Breakdown Snapshot

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Overview

This article goes over the breakdown snapshot in TDO. This report is perfect for seeing a breakdown of your Insurance, Adjustments and No Charges.

Detailed Instructions

Click **Reports** on the top menu bar; select **Financials – Breakdown Snapshot.**

First, select the time period you wish to see the details for as well as which (or all) practice doctors. Then, select which breakdown you wish to view.

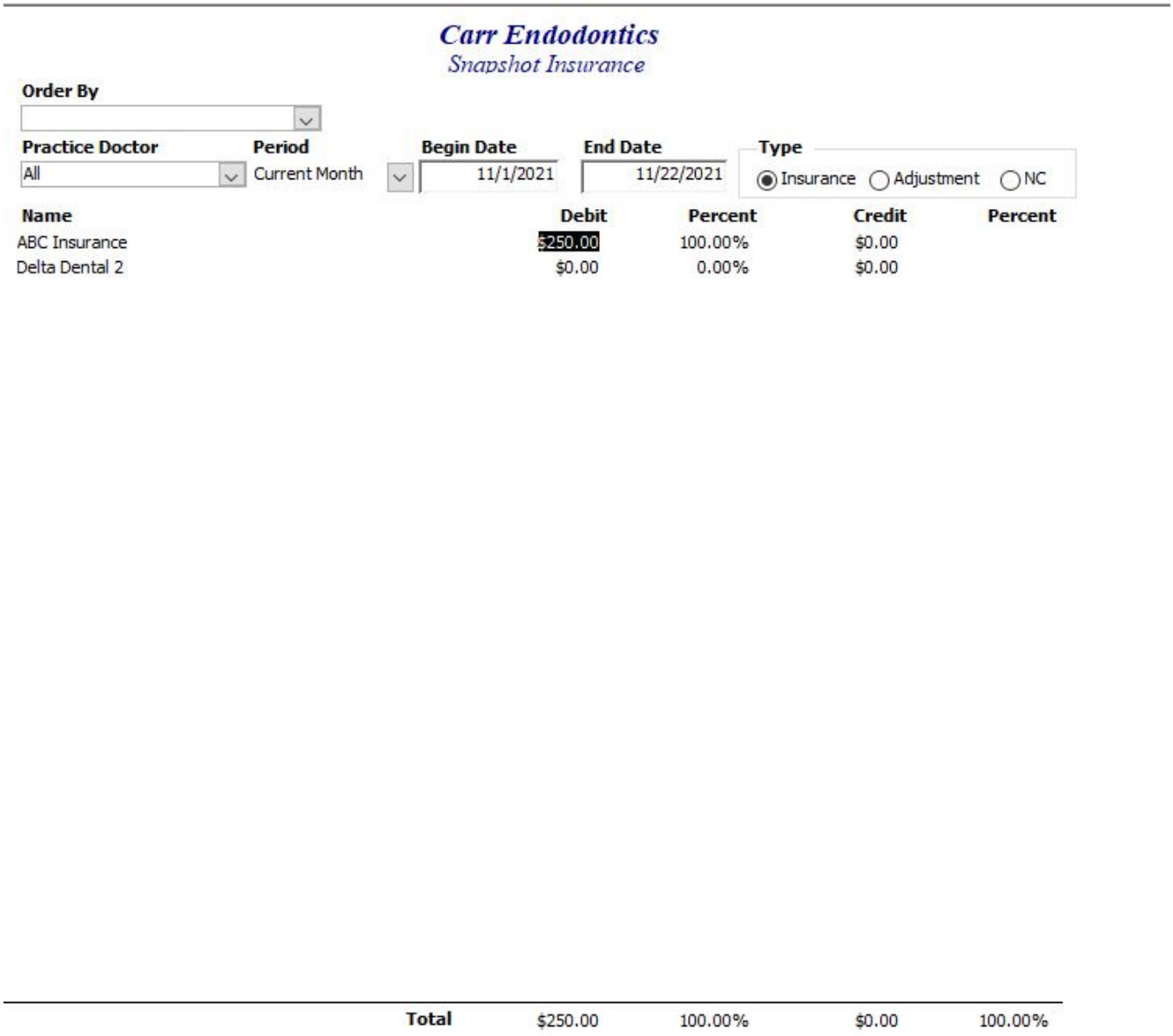
Debits are what was billed to insurance and the **percentage** is the percentage of insurance billing that company represents. **Credits** are insurance payments and the **percentage** is the percentage of all insurance payments that company represents.

Type

Insurance - You will see the dollar amounts and percentages billed and collected for each insurance company for that time period. It is really valuable to see how much you are billing to each company and then also the percentage of collections. For example, you might see you are billing 80% of all insurance to Delta but only collecting 40% of insurance collections.

Adjustment in the Type box at the top you will see the dollar amounts and percentages for each type of debit and credit adjustment during that time period.

NC in the Type box at the top you will see a breakdown of the dollar amounts and percentages for each type of no charge procedure posted from the fee page.



Carr Endodontics

Snapshot Insurance

Order By

Practice Doctor All

Period Current Month

Begin Date 11/1/2021

End Date 11/22/2021

Type (●) Insurance ( ) Adjustment ( ) NC

Name	Debit	Percent	Credit	Percent
ABC Insurance	$250.00	100.00%	$0.00	
Delta Dental 2	$0.00	0.00%	$0.00	
Total	$250.00	100.00%	$0.00	100.00%

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