Belle Curve Insights · Big-Firm Analytics for Chiropractic Practices

Your Profit Leak Audit — data request

CHIROTOUCH · ~15 MINUTES

To run your audit we need a few standard reports out of ChiroTouch — **no login access, no PHI beyond what billing already contains.** Export each as **Excel or CSV** (not PDF) for the same date range, and send them back. That's it. Menu names vary slightly by ChiroTouch version; if a label differs, look for the report that produces the described data.

THE 5 REPORTS WE NEED

1. Payer Mix `by insurance company`

ChiroTouch: Reports → Payer Mix (or "Patients by Insurance")

Patient count by insurance carrier for the period. This tells us your book of business by payer.

2. Procedure / Provider Productivity `charges & payments by code`

ChiroTouch: Reports → Provider Productivity / Procedure Code Productivity

By CPT / case type: units, amount charged, insurance paid, patient paid, and total collected. This drives revenue-per-visit and CPT profitability.

3. Collections by Provider `payments received`

ChiroTouch: Reports → Payment Summary / Collections by Provider

Payments received in the period, split by provider and payment source (insurance vs. patient, cash/card/check/ERA).

4. Insurance Aging / A/R `outstanding claims`

ChiroTouch: Reports → Insurance Aging (A/R) Report

Open claims by payer and age bucket (0–30, 31–60, 61–90, 90+). This is where uncollected revenue and stalled claims surface.

5. Unapplied / Unallocated Payments `money not yet credited`

ChiroTouch: Reports → Unapplied Payments / Credit Balance

Payments received but not applied to a patient account. Often thousands of dollars sitting uncredited — a fast, direct recovery.

► **How to get started — step-by-step directions on the next page**

STEP-BY-STEP DIRECTIONS

HOW TO SET EACH REPORT

- **Date range:** last 3 full calendar months (by date of service).
- **Providers:** all providers.
- **Payers:** all insurance + self-pay.
- **Export as:** Excel (.xlsx) or CSV — **not PDF.**
- **Name files** by report + month, e.g. *PayerMix_JanMar.xlsx*.

PRIVACY & SECURITY

- We sign a **Business Associate Agreement (BAA)** before you send anything.
- Data is transferred over a secure upload link (not email) — bellecurveinsights.com/upload.
- Prefer to de-identify? Patient **names aren't required** — an account ID is enough.
- We only use your data to produce your audit. Never shared or resold.

SEND IT IN 3 STEPS

1. Run the 5 reports above for the last 3 months and export each to Excel/CSV.
2. Drop all files into our secure upload link: bellecurveinsights.com/upload.
3. We confirm receipt and deliver your Profit Leak Audit within about a week.

Questions or a different ChiroTouch version? Email sandra@bellecurveinsights.com and we'll walk you through it.

Not sure a report exists in your version? Send what you can — even the Payer Mix and Provider Productivity exports are enough to start. We handle the rest.