Belle Curve Insights

Your Profit Leak Analysis — data request

STEP ONE · CHIROTOUCH · TWO EXPORTS · ~15 MINUTES

To run your Profit Leak Analysis we need **two** exports out of ChiroTouch — no login access required, and nothing we do not need. Export both as Excel (not PDF) and send them back. That is the whole lift on your side.

THE TWO EXPORTS WE NEED

1. **Payment Details** what came in, and what was applied

Reports → Collections and Productivity → Payment Details → EXCEL

Every payment received in the period, with its method and how much of it was applied to a charge. This one file carries the headline number, the payment-method breakdown and the account-level detail.

Date range: two full calendar months that closed at least 30 days ago
Grouped by: Preferred Provider/Location
Voided payments: excluded (the default)

2. **Patient Accounts Receivable** what is still owed, as of today

Reports → Accounts Receivable → Patient Accounts Receivable → EXCEL

Outstanding balances by patient with aging buckets, and the unallocated cash sitting on each account. Include credit and negative balances if the report offers the option.

Date range: none — this is a snapshot, so run it as of today
Include: credit / negative balances
Also useful: Payer Accounts Receivable, if it is one more click

Why the second export matters. On its own, a payment sitting unapplied looks like money waiting to be posted. Sometimes it is — and sometimes the patient has simply paid ahead and owes nothing, which is not a leak at all. The only way to tell the two apart is to look at what each account still owes. In a recent pilot the two largest items in the audit turned out to be prepayments, not posting failures. The second export is what keeps that out of your report.

BEFORE YOU SEND

Write down the date you ran each report. Unapplied balances move as payments get posted, so the same report run two weeks apart gives a different number. The run date is what makes the findings hold up — and your system does not record it in the file.

Send the export as it comes out. No cleanup, no reformatting. If something will not export, a screenshot of the report on screen is enough to start.

Not sure you are looking at the right reports? Send us a screenshot of your reports menu and we will point you to the exact two — or we will walk you through them on a short screen share. We never need your password.

PRIVACY & SECURITY

We sign a **Business Associate Agreement** before you send anything.

Files go over a secure upload link, never email — **bellecurveinsights.com/upload**.

Patient names are not required. An account ID is enough.

We use your data only to produce your audit. Never shared, never resold.

1. Run the two exports above.
2. Drop both files into the secure upload link: **bellecurveinsights.com/upload**
3. We confirm receipt, and deliver your Profit Leak Analysis in about a week — a short report plus a call to walk through it.

This is the data request for the **Profit Leak Analysis** — the fixed-scope first look. Going deeper into **Full Practice Findings** takes a wider set of exports; ask us for that request sheet when you are ready.