

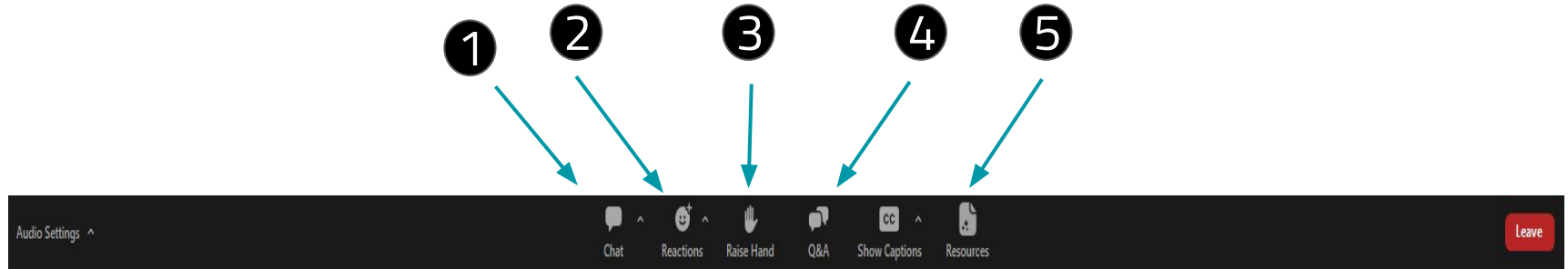


Meet the new Practice Analytics

Next level Reporting &
Dashboards



Navigating Zoom



All attendees will be muted during this webinar.

1. **Chat** - Please enter additional team members names, who have not registered for the webinar.
2. **Reactions** - Use this to react with smile, like thumbs up, or celebrate emoji.
3. **Raise Hand** - Attendees can raise hand to alert trainer you have a question. Please add your question to the Q&A tab.
4. **Q&A** - Send questions throughout the webinar to organizer and panelists
5. **Resources** - Are available to download during the session

Speaker

Matt Tadros
Director of Product
Practice Management and RCM Technologies



AGENDA

Introduction

- Today vs Future
- Reports Overview

Functionality

- Differences
- Similarities

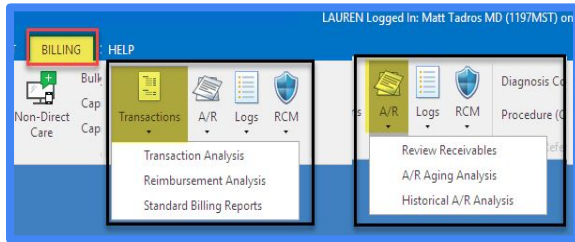
New Reports

- Historical AR
- Patient Demographics

OP Reporting Today

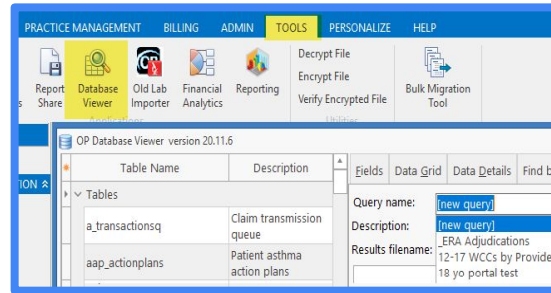


OP supports a variety of reporting methods & tools, so before we jump in to Practice Analytics, let's take a step back and set the stage...



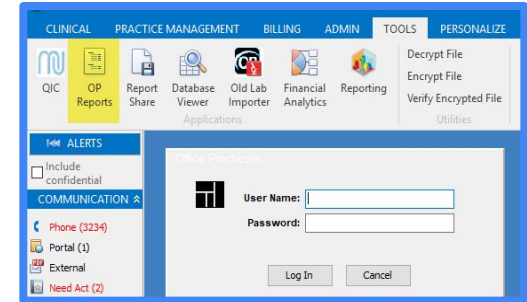
Billing Reports

- Built into OP out of the box, the majority of these reports live under the Billing tab
- These are where the reports that were “lifted and shifted”
- With predefined parameters, these reports cannot easily be modified



Reporting with SQLs

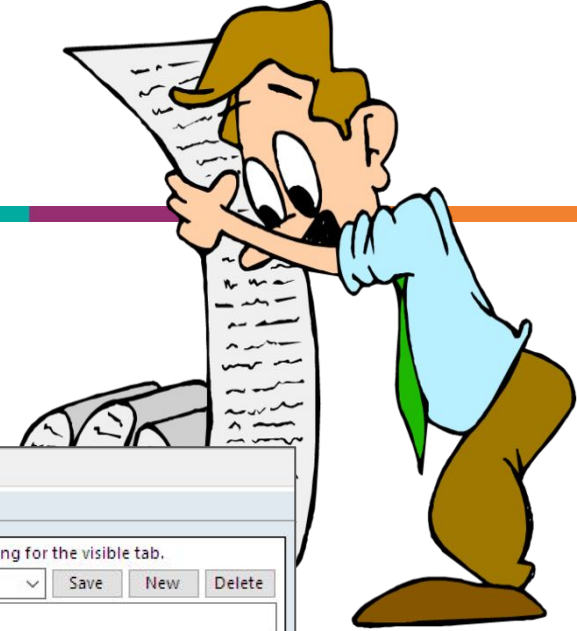
- Accessed via Database Viewer out of the box in OP
- Users can build their own SQL queries



OP Reports (Reports Builder)

- Reports built via Report Builder
- Docs like school and camp forms, General/Referral letters, billing statements, and more can be mass-generated

Why the Change?



LAUREN Logged In: Matt Tadros MD (1197MST) on matt.ta

CLINICAL PRACTICE MAGEMENT **BILLING** HELP

Schedule Billing Center Patient Chart Tasks Non-Direct Care Bulk Cap Cap

Transactions A/R Logs RCM

Transaction Analysis Reimbursement Analysis Standard Billing Reports

A/R Logs RCM

Review Receivables A/R Aging Analysis Historical A/R Analysis

Diagnosis Co Procedure (C

ALERTS

Include confidential

Billng Analysis x

Analyze Transaction Maintenance

Search criteria

Reference dates: 3/27/2024 to 3/27/2024

Reference date:

Charge/payment

Posting (entry)

Daysheet

Daysheet ID

Refresh Grid

Include non-daysheeted Include voids

Save/Restore column selection and data filtering for the visible tab.

Report name: Save New Delete

Description:

Filters:

Auto column width Expand grid Print Grid Export

Transactions: Charge, payment and adjustment trans

Transactions Total Receipts Receipts for Deposit Accounting Transfers Patient Credit Account Void Trans. Only Pract. Level Adj.

- Reports scattered throughout OP
- Multiple clicks to reach your desired destination
- Lacking clarity, purpose, frequency
- Restrictions on the amount of data you can export
- Empowering practices to be more successful (more reports to come)

Under the Hood

- OP → Snowflake → New Reports (data flow)
- Parsed Data
- Nightly Snapshots
- Near-real-time
- Daysheeting and Dates
- No restriction on data (exporting Excel)
- Summarized Data and Visualization
- Updates are *not dependent* on OP releases



Enablement

The screenshot shows the 'Security Settings' window with the 'Users' tab selected. The 'Staff Search' field contains 'dd9'. In the 'Users' list, 'DD9' is expanded to show a tree of permissions. The 'Tools_Reporting' permission is highlighted with a red box. A red arrow points from this permission to the 'Edit User...' button.

The screenshot shows the 'Staff Directory' window with the 'Basic Info' tab selected. The user 'Demo Doctor, MD' is selected. The 'Edit Address' dialog is open, showing the 'Email address 1' field with the value 'TTPXJOTLJ@LSFTTMZQFEI@BUSIDT.DPN'. A red arrow points from the 'Tools_Reporting' permission in the previous screenshot to this field.

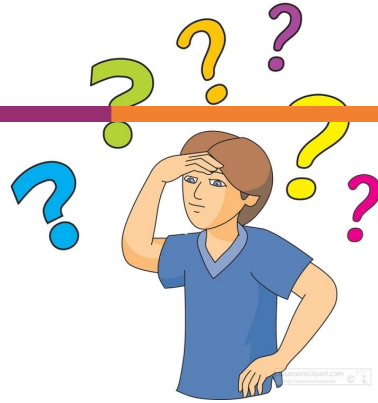


- Security Permission: **Tools_Reporting**
- Enter Email Address1 in the Staff Directory

FAQ - Unable to Access

Please verify the following configuration items are downloaded or configured correctly:

- Correspondent Record WEBREPORTS is enabled
- Security Permission was enabled
- Email Address1 in the Staff Directory was added
- On-premise, on version 21.3.53
- On-premise, downloaded WebView2 on each workstation
- Valid [Keycloak](#) permission must be enabled for users



Visual Changes

The screenshot displays a software interface with a top navigation bar containing 'REPORT', 'Financial Analytics', and 'Clinical Analytics'. Below this is a 'TOOLS' menu with 'Reporting' highlighted. The main dashboard is organized into several report sections:

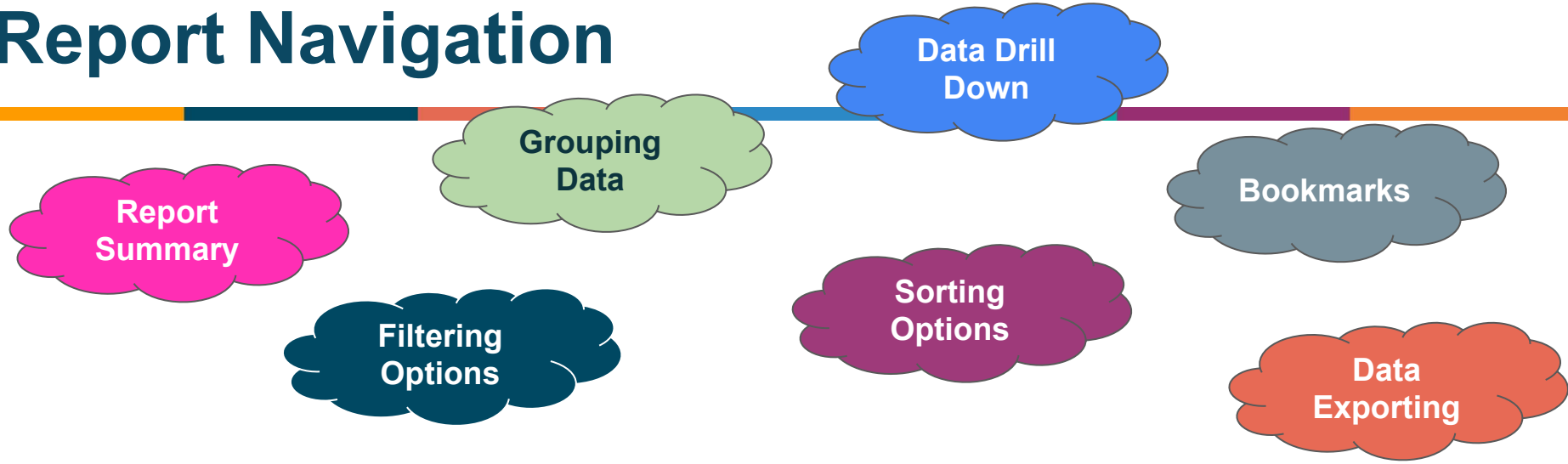
- Scheduling Reports**: Charges per Scheduled Appointment, Reimbursement per Scheduled Visit, Scheduled Appointments, Unbilled Charges for Scheduled Appts.
- Daily Reports**: Patient Credit Account, Practice Level Adjustments, Transaction Analysis, Transactions For Check Number.
- Accounts Receivable Aging Analysis**: Payer: Insurance A/R, Location: Insurance A/R, Rendering: Insurance A/R; Payer: Payer A/R, Location: Patient A/R, Rendering: Patient A/R; Payer: Total A/R, Location: Total A/R, Rendering: Total A/R; Payer: Pat Resp. Date A/R; Payer: Sec Resp. Date A/R.
- General Reports**: Patient Demographics.
- Analytics**: Practice Overview.

Other sections include 'Daysheet Dependent' (Accounting Transfers, Daysheet Log, Receipts for Deposit, Total Receipts, Void Transactions Only) and 'Monthly Reports' (Compare Allowable to Payment, Financial Summary, Reimbursement Analysis).



- One designated area for all reporting & analytic needs
- Organized category driven report sections
- Easily navigate to categorize report

Report Navigation

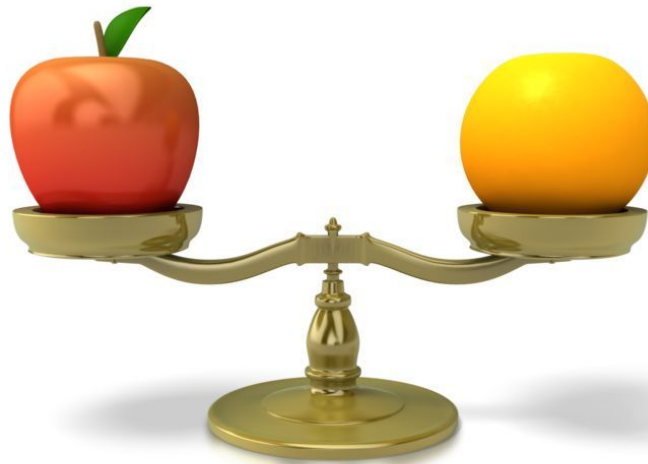


*Default Settings

- All columns show by default
- Date range defaults to last 30 days



Compare Current vs. New



Comparing Current vs. New

REED FOWLER
1:00, Satellite Location

TEST, CHRIS | ~EST WELL CHK: 11-

Conference
Satellite Locatio

Block- Lunch
Satellite Locatio

Conference
Satellite Locatio



Appt.Date	Provider	Type of Visit
3/11/2024	2035 REED FOWLER	Cnt: 5
	Type of Visit :	Cnt: 3
	Satellite Loca	
	Satellite Loca	
	Satellite Loca	
	Type of Visit : EST WELL CHK	Cnt: 1
	Main Office	EST WELL CHK
	Type of Visit : TEST CONSULTATI	Cnt: 1
	Main Office	TEST CONSULTATI



Scheduling based reports exclude non-patient notes

Detailed Report

Appointment Date	Provider	Appointment Type	Appointment ID	Patient
03/11/2024	2035 REED FOWLER	EST WELL CHK	233638	7375 TEST CHRIS
		TEST CONSULTATI	233645	7452 Test Friday

Comparing Current vs. New

Transactions	Total Receipts	Receipts for Deposit	Accounting Transfers	Patient Credit Acco		
Dep. Method						
Daysheet ID	Daysheet Date	Patient ID	First Nm.	Last Nm.	Ins. Paid + Pat. Paid	Ins. Pay.
Dep. Method: CK						
3070	3/11/2024	99983686	TT	TT	50.00	50.00
3070	3/11/2024	99983689	BOLO	BOLO	200.00	
3070	3/11/2024	99982825	KIM	XXXTTEST	15.00	
3070	3/11/2024	99983686	TT	TT	200.00	
3070	3/11/2024	99983688	AOLO	AOLO	200.00	
3070	3/11/2024	99983691	ONE	DEE	100.00	
					6	765.00



Distinct Patient Counts

Daysheet Date

Last 30 days (02/24/2024 - 03/24/2024)

Posted Date

Select date range

Total Patients

5

Total Insurance Paid

\$250.00

Detailed Report

Daysheet ID	Daysheet Date	Posted Date	Deposit Method	Patient	Ins. Paid
3070	03/11/2024	03/11/2024	Check	99983691 ONE DEE	
3070	03/11/2024	03/11/2024	Check	99983689 BOLO BOLO	
3070	03/11/2024	02/13/2024	Check	99982825 KIM XXXTTEST	
3070	03/11/2024	03/08/2024	Check	99983686 TT TT	
3070	03/11/2024	03/11/2024	Check	99983688 AOLO AOLO	
3070	03/11/2024	03/08/2024	Check	99983686 TT TT	

Charges per Scheduled Appt

Standard Reports

Charges per Scheduled Appt

Search criteria
Reference dates: 3/28/2024 to 3/28/2024

Reference date:
 Appt. Date
 Posting (entry)
 Daysheet

Auto column width
 Expand grid

Appt. Date	Total Pat. Appts. in Sched	No. Appts. w/Chrgs	Charges	No. Appts. w/SBills	Superbill Charges
3/28/2024	4	1	\$0.00	1	\$0.00

Appt. Date	Appt. Type	No. Visits w/Chrgs	Charges	No. Appts w/SBills	Superbill Charges
3/28/2024	WELL VISIT, EST	0		0	
3/28/2024	WELL VISIT, EXT	1	\$0.00	0	

Appt. Date	Appt. Type	Patient ID	No. Chrg. CPT	Charges	No. SB CPT Codes	Superbill Charge
3/28/2024	WELL VISIT, EXT	121329	5	\$0.00	0	

Appt. Date	Appt. Type	Patient ID	Chrg. CPT	Chrg. CPT Desc.	Charge	SB CPT	SB CPT Desc.	SB
3/28/2024	WELL VISIT, EXT	121329	1	PAYMENT	\$0.00			
3/28/2024	WELL VISIT, EXT	121329	1	PAYMENT	\$0.00			
3/28/2024	WELL VISIT, EXT	121329	1	PAYMENT	\$0.00			
3/28/2024	WELL VISIT, EXT	121329	1	PAYMENT	\$0.00			
3/28/2024	WELL VISIT, EXT	121329	2	CO-PAY PAID	\$0.00			

Appt. Date	Appt. Type	No. Chrgs	Charges	No. Appts w/SBills	Superbill Charges
3/28/2024	WELL VISIT, NEW	0		1	\$0.00



Excludes "CPT" codes
1-4 Not truly 'charges'

My View Office View COVID WORK IN Location: ANON PEDS DOS Settings: NA/OOO, Visit_Details

Date: 3/28/2024

Time: All AM PM

Expand grid
 Exclude checked out
 Auto refresh
 Exclude not checked in
 Show billing panel

CLAIM TEST
 Primary: AETNA, 1122 (Commercial)
 Subscriber: CLAIM TEST, 02/15/2024 SELF
 Second: CIGNA, 233 (Commercial)
 Subscriber: CLAIM TEST, 02/15/2024 SELF
 Pat Resp: Copayments only, waived for preventive care
 Patient Balance: \$148.46 Credits: \$0.00
 Family Balance: \$148.46 Credits: \$0.00

#	Time	Patient	Reason	TOV	Arrival	Visit Status	Mi n.	Billing Status	Checko ut	Confirm Status
1		PEYTON RASMUSSEN, MD (COUNT=3)								
09:00		FREEMAN, A	WELL VISIT,							Confirmed
09:15		WELL VISIT	WELL VISIT,							Confirmed
09:00		TEST, CLAIM	WELL VISIT,					Checked O	01:50	Confirmed

UNPOSTED CHARGES

Date	Prov	CPT-Mod	Description	DX	Description
03/28/2024		1	PAYMENT		
03/28/2024		1	PAYMENT		
03/28/2024		1	ADJUSTME		
03/28/2024		1	BILL		
03/28/2024		2	PATIENT		

Pat.ID: 121329 Thursday, March 28, 2024 Week# 13

Unbilled Charges for Scheduled Appts



Includes “CPT” codes 1-4
Today they are being excluded
because the system reads them
as charges.



Standard Reports Schedule

Unbilled Charges for Scheduled Appts

Search criteria
Reference dates: 3/28/2024 to 3/28/2024

Reference date:
 Charge/payment
 Posting (entry)
 Daysheet
 Daysheet ID

Auto column width
 Expand grid

Refresh Print Grid Export

Rpt. hint: ⓘ
SQL hint: ⓘ

Visit Status Appt. Date Appt. Type

Appt. Date	Patient ID in Schedul	Scheduled with Provide	Charges	Superbill Charges
Visit Status :	Cnt: 1			
Appt. Date : 3/28/2024	Cnt: 1			
Appt. Type : WELL VISIT, NEW	Cnt: 1			
3/28/2024	1235	107: PEYTON RASMUSSEN		

My View Office View COVID WORK IN Location: ANON PEDS DOS Settings: /NA/OOD, Visit, Details

Calendar Tracking

Date: 3/28/2024 Show tasks: Expand grid Exclude checked out Exclude not checked in Show billing panel

Time: All AM PM

Print Validate Confirm Upc Show Blank Billing Status Days since today: 7 30 90 180

Send Message Statements Re

CLAIM TEST
Primary: AETNA 1122 (Commercial)
Subscriber: CLAIM TEST 02/15/2024 SELF
Second: CIGNA 233 (Commercial)
Subscriber: CLAIM TEST 02/15/2024 SELF
Pat Resp: Copayments only, waived for preventive care
Patient Balance: \$148.46 Credits: \$0.00
Family Balance: \$148.46 Credits: \$0.00

UNPOSTED CHARGES
Auto-Post Post All Post Selected Edit

Date	Prov	CPT-Mod	Description	DX	Description
<No data to display>					

POSTED CHARGES
Edit Apply Payment Change Payer

Date	Prov	CPT-Mod	Description	DX	Description
03/28/2024	1	PAYMENT			
03/28/2024	1	PAYMENT			
03/28/2024	1	ADJUSTME			
03/28/2024	1	BILL			
03/28/2024	2	PATIENT			

Pat ID: 121329 Thursday March 28, 2024 Week# 13

A/R Aging Analysis- Summarized Totals



Based on end-of-day snapshot (close of business)
 Non-dependent on Daysheeting, therefore charge/ payments entered after daysheeting will display

A/R report type: Ins. Payer - Ins. A/R Refresh Print Export

Show summary totals Show patient details

Latest daysheet processed: 06/27/2023 Daysheet ID: 3060

Print expanded area only auto column width

Insurance Carrier	0 to 30	%	31 to 60	%
APP AETNA PPO [AETNA]	0.00	0.00%	0.00	0.00%

Insurance	Patient ID	0 to 30	31 to 60	61 to 90	91 to 120	Over 120	Total A/R
APP	6863	0.00	0.00	0.00	0.00	895.00	895.00
APP	6883	0.00	0.00	0.00	0.00	90.00	90.00
APP	6908	0.00	0.00	0.00	0.00	225.00	225.00
APP	6914	0.00	0.00	0.00	0.00	365.00	365.00
APP	6925	0.00	0.00	0.00	0.00	145.00	145.00
APP	6934	0.00	0.00	0.00	0.00	805.00	805.00
APP	6950	0.00	0.00	0.00	0.00	740.00	740.00
APP	6955	0.00	0.00	0.00	0.00	290.00	290.00
APP	6964	0.00	0.00	0.00	0.00	275.00	275.00
APP	7007	0.00	0.00	0.00	0.00	90.00	90.00
APP	7017	0.00	0.00	0.00	0.00	920.00	920.00
APP	7037	0.00	0.00	0.00	0.00	155.00	155.00
APP	7222	0.00	0.00	0.00	0.00	370.00	370.00
APP	7289	0.00	0.00	0.00	0.00	15.00	15.00
APP	7419	0.00	0.00	0.00	0.00	(99.90)	(99.90)
APP	7517	0.00	0.00	0.00	0.00	135.00	135.00
APP	32040	0.00	0.00	0.00	0.00	8.00	8.00
APP	99982495	0.00	0.00	0.00	0.00	0.07	0.07
APP	99982825	0.00	0.04	0.00	0.00	0.04	0.04
APP	99982998	0.00	0.00	0.00	120.00	209.03	329.03
APP	99983076	0.00	0.00	0.00	0.00	0.29	0.29
APP	99983085	0.00	0.00	0.00	0.00	0.19	0.19
APP	99983686	110.00	0.00	0.00	0.00	0.00	110.00
APP	99983689	700.00	0.00	0.00	0.00	0.00	700.00
APP	99983695	600.00	0.00	0.00	0.00	0.00	600.00
APP	99983701	41.00	0.00	0.00	0.00	0.00	41.00
APP	99983702	143.00	0.00	0.00	0.00	0.00	143.00

A/R Aging Analysis- Insurance Payer- Insurance A/R

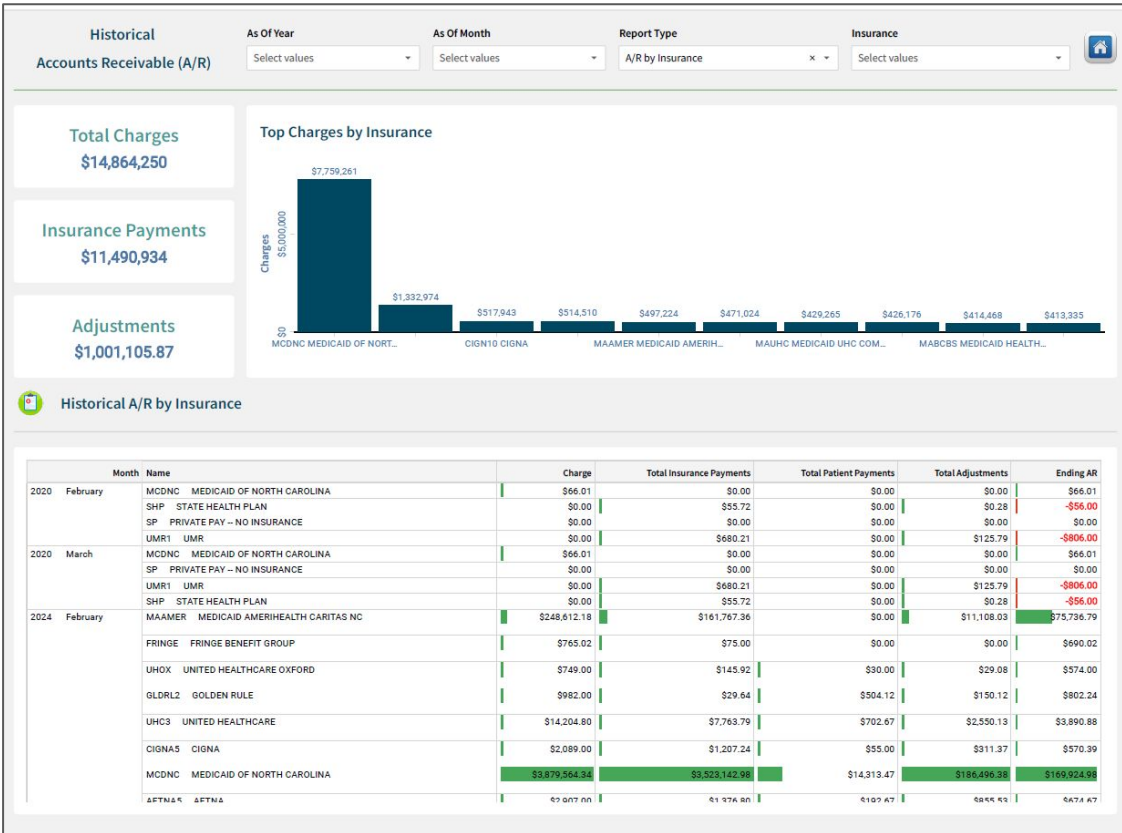
Insurance Carrier	0-30	0-30 (%)	Patient	0-30 Days
+ ACB AMERIHEALTH TPA	\$0.00	0.00%		
+ AHM AETNA HMO	\$0.00	0.00%		
+ AMS MYALLSAVER	\$0.00	0.00%		
+ ANI AMERIHEALTH NI	\$0.00	0.00%		
- APP AETNA PPO	\$1,594.00	4.25%		
			99983689 BOLO BOLO	\$700.00
			99983695 INU INU	\$600.00
			99983702 CR CR	\$143.00
			99983686 TT TT	\$110.00
			99983701 DR DR	\$41.00
			6863 ELLEN C8C7AF3D	\$0.00
			2739 LONDON A73C9	\$0.00
			6831 CADEN EBE5E7	\$0.00
			323 AUSTIN CA73F05E70	\$0.00
			5843 MASON 59501E	\$0.00
			5624 EMMA FD610	\$0.00



New Reports



Historical A/R



- Snapshots!
- Month over month snapshots of A/R
- Data from March 2024 onward (no retroactive data)
- New data structure/ tables



Patient Demographics

Register Date: On or after 04/03/2023 | Patient Status: ACTIVE | PCP: Select values | Last Visit: Select date range | Recall Type: Select values

Register

Patient #	Patient Name	Alt First Name	Age	Birth Date	Sex/Gender Identity	Primary Address	Orientation	Orientation Details	Language	Alternate Id	Alt Last Name	Ethnicity	Ethnicity Details	Register Date	Race	Race Details	City	State	Zipcode	County	Country
3506	LORALEE H CUARESMA	null	14	09/14/2010	F	1467 BLUE EAGLE WAY EAST	4	null	null	null	null	2	null	null	18	null	JACKSONVILLE	FL	32225	null	US
4746	JASMINEI BARRERAS	null	15	03/13/2009	F	2467 PARIS MILL RD	4	null	null	null	1	null	null	null	4	null	JACKSONVILLE	FL	32221	null	US
3889	TRISTAN N MCCLENDON	null	16	06/27/2008	M	329 Redwood Lane	4	null	null	null	2	null	null	4	null	null	Jacksonville	FL	32259	null	US
65096	LEO TEST	null	3	09/25/2021	M	POLAND	4	null	null	null	null	null	09/25/2023	0	null	Cleveland	OH	44144	1	AW	
4704	JOSHUA M NEWMAN	null	21	05/11/2003	M	3580 PALL MALL DRIVE	4	null	null	null	2	null	null	null	16	null	Jacksonville	FL	32257	null	US
6228	DESTINY ROBINSON	null	21	06/06/2003	F	14178 big spring st	4	null	null	null	2	null	null	null	16	null	Jacksonville	FL	32258	null	US
6148	NATALEIGH A BARNETT	null	16	10/05/2008	F	302 SOUTHERN BRANCH LN	4	null	null	null	2	null	null	null	20	null	SAINT JOHNS	FL	32259	null	US
6087	BRAYDEN MACCLURE	null	14	02/05/2010	M	16808 OAK PRESERVE DRIVE	4	null	null	null	2	null	null	null	16	null	JACKSONVILLE	FL	32226	null	US
5222	PATRICK R BROWN	null	15	07/22/2009	M	403 ALLAPATTAH AVE	4	null	null	null	2	null	null	null	16	null	Saint Augustine	FL	32092	null	US
6229	BROOKE ROBINSON	null	18	08/11/2006	F	14178 big spring st	4	null	null	null	2	null	null	null	16	null	Jacksonville	FL	32258	null	US
3150	BABY TEST	null	9	07/11/2015	M	12345 Bartram Road	4	null	null	null	1	null	null	null	4	null	Jacksonville	FL	32258	null	US
4139	ANGELICA K GENAO	null	18	11/23/2006	F	6234 OLETA WAY	4	null	null	null	1	null	null	null	16	null	JACKSONVILLE	FL	32258	null	US

SUMMARY ^ 12 rows - 41 columns

Insurance

Patient #: 3889 | Insurance Status: Select values

Patient #	Insurance Status	Insurance Carrier Code	Insurance Carrier Name	Primary Ranking	Secondary Ranking	Tertiary Ranking	Capitation	Cap
3889	ACTIVE	BC	BC	BC	null	null	null	null

SUMMARY ^ 1 row - 36 columns

Contact

Patient #: 3889

Patient #	Family Contact Last Name	Family Contact First Name	Nick Name	Birth Date	Language	Address	City	State	Zipcode
3889	PERRY	CYNTHIA	null	null	null	null	null	null	null
3889	FLYNN	RICHARD	null	null	null	null	null	null	null
3889	MCCLENDON	NICKETTE	null	null	null	329 REDWOOD LANE	JACKSONVILLE	FL	32259
3889	PERRY	HUGH	null	null	null	null	null	null	null

SUMMARY ^ 4 rows - 24 columns

- New Demographic Report
- Capture patient population and key data points
- Easily identify a subset of your patient population



What's Next?

- Financial analytic dashboards
- More financial reports
- Clinical reports and dashboards

General Reports

- Alerts
- Claim Status
- Eligibility Inquiry Status
- RVU
- Statements
- Task Details



If you have an idea for new reports or dashboards, please post them on our ideas portal!

Questions?

