

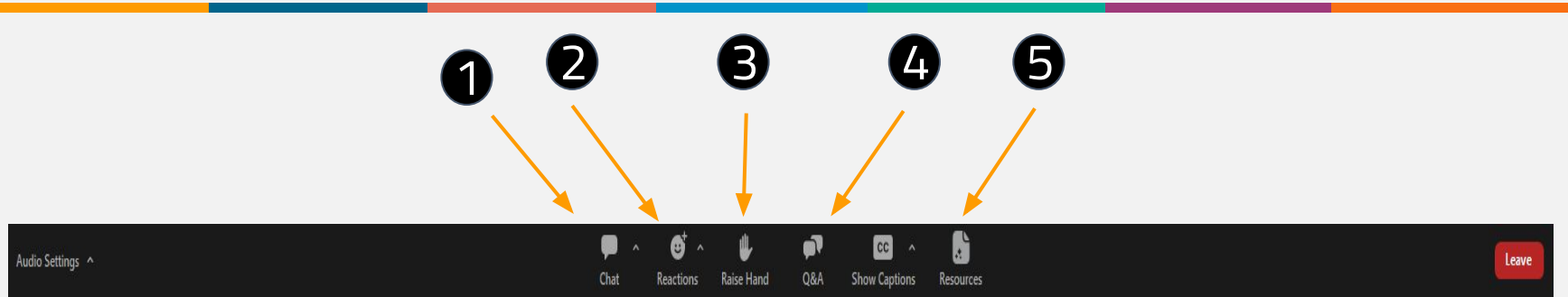


# Workshop: Navigating the Top Five Reports in OP Practice Analytics

Kristin DeSalle, Training Team Supervisor



# 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

**Kristin DeSalle**  
Training Team Supervisor



# Objectives



In this webinar, we'll walk through:

- **Permissions** needed for new reports
- **Scheduling Reports**
  - Unbilled Charges for Scheduled Appointments
- **Daysheet Dependent reports**
  - Total Receipts
- **Daily Reports**
  - Billing Analysis
    - Total Charges by Rendering Provider
- **Monthly Reports**
  - Reimbursement Analysis
    - Payments received for particular CPT code(s).
- **Practice Analytics Dashboard** (Free)

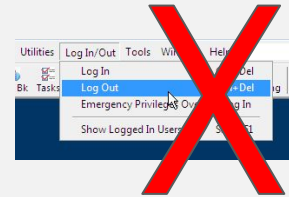
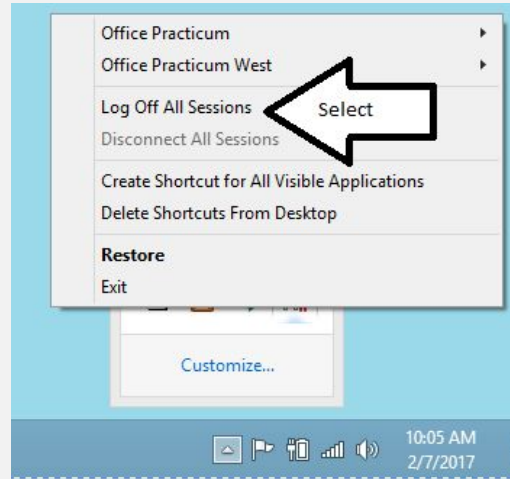
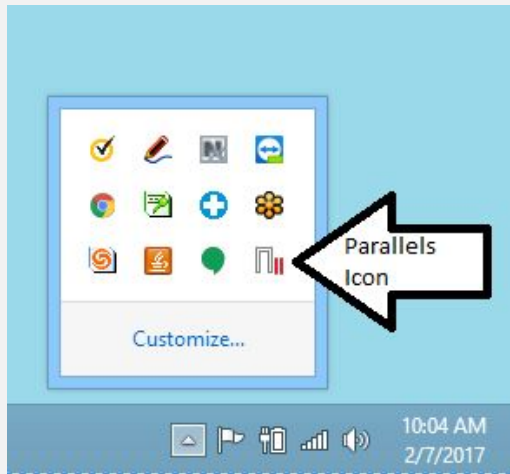


## Activity 1

# Adding permissions for new reports

# Log off all Sessions

Find the Parallels icon in your taskbar (bottom right corner of your screen where you find the time and date). Right-click the Parallels icon and select Log Off All Sessions.



Logging out of OP is **not** the same as doing a Log Off All Sessions.



## Activity 2

# Report: Total Receipts

**Importance:** Balance payments for users and see total receipts for a specified time period.



## Activity 3

# Report: Unbilled Charges for Scheduled Appointments

**Importance:** Identify any appointments that may be missing charges





## Activity 4

# Report: Transaction Analysis

**Importance:** View charges, payments and adjustments for specified time period.



## Activity 5

# Report: Reimbursement Analysis

**Importance:** Payment history by CPT, Insurance payment monitoring, and Payment history by provider.



## Activity 6

# Dashboard: Practice Analytics Dashboard (free)

**Importance:** KPI Net collections Adjustments trend over time Month, Quarter or Year, Denials & AR aging benchmark comparison (against MGMA)



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

# Resources



- [Practice Analytics: Overview](#)
- [Practice Analytics / Billing Reports Comparison](#)
- [Data Element Tutorial](#)
- [Filter Tutorial](#)
- [Maximized Elements](#)
- [Webinar Recording: Practice Analytics \(Presented May 9, 2024\)](#)



Q&A