OP | Webinar Resource Handout:

Workshop: Navigating the Top Five Reports in OP Practice Analytics

Scenario #1: Adding Permissions for new reports	
Exercise A: Add permission 1. Navigate to **Practice Management > Staff Directory** (OR **Admin>Security Administration**) 2. Click **Security Access**. The Security Permission window opens. 3. Scroll to find the user on the left-hand side of the grid. 4. Scroll to find **Tools_Reporting** on the right-hand side of the grid. 5. Drag and drop Tools_Reporting under the user's name or use the red arrow to move it over. 6. Close the Security Permission window.	
Exercise B: Add an email address to user in address book 1. Click the **Address Book** Icon. 2. Click on the **Address** tab. 3. Enter an email address in the Email Address 1 field. *The user will need to log out of OP and out of Parallels.*	
Exercise C: Open the Reports Module 1. Log back into OP. 2. Navigate to **Tools > Practice Analytics** 3. The reports module opens up to the landing page.	

Scenario #2: Navigating Through the Reports

You want to filter, group, hide columns, and sort the report to view relevant data.

Report Name: Total Receipts

Exercise A: Open a Report from the landing page

1. If not already there, navigate to **Tools > Practice Analytics**
2. Select **Total Receipts** under Daysheet Dependent Reports on the landing page. The report opens with a defaulted date range of 30 days.

Exercise B: Review the Date filter options

1. Click in the **date filter** at the top of the report.
2. Click the drop-down next to Last.
3. Select **On**. The calendar opens.
4. Select a **date**. You'll see the Detailed Reports grid and summaries updated to reflect the date selected.
5. Click on the **drop-down** next to On.
6. Select **between**.
7. Enter a **start date** in the first calendar.
8. Enter an **end date** in the second calendar. You'll see the Detailed Reports grid and summaries updated to reflect the date selected.

Exercise C: Review the Detailed Report filter option

1. Once you have the desired date entered, click on the **expand button** in the upper right corner of the Detailed Report grid. The Detail Report grid expands.
2. Click the **drop-down** next to any column.
3. Click **Filter**. The filter pop-up opens
4. Click the **toggle** to the left of a filter to enable it.
5. Click the **drop-down** to see the available options to filter by
6. Select one or more.
7. View the details grid updates.
8. Go back into the filter window.
9. Click the **ellipses**.
10. Select **change filter types**.

11. Select one of the options. 12. Enter criteria. The details grid is updated.	
Exercise D: Sort columns in ascending and descending order 1. Select a **column** and right-click on the column. 2. Select **ascending**. The grid is sorted in ascending order for that column. 3. Right-click on the column again. 4. Select **descending**. The grid is sorted in descending order for that column.	
Exercise E: Group and ungroup by columns 1. Right-click on a column, and select **Group column** from the drop-down. The grid updates with the data grouped by that column. 2. Click the **+** sign to expand the column. 3. Click the **-** sign to collapse the column. 4. Right-click on the column again. 5. Select **Remove from Grouping** from the drop-down. The report is now ungrouped.	
Exercise F: Hide and unhide columns 1. Right-click on a column. 2. Select **Hide Column** from the drop-down. The grid updates with that column no longer visible. 3. Click **Control Z** to bring the column back, OR click the Reset button at the bottom right of the report. *NOTE: Clicking Reset will reset all changes you have applied.*	
Outcome: You can filter, sort, hide, and group the report by certain criteria to find the data needed.	

Scenario #3: You are ready to run reports. You want to make sure that charges for last week's scheduled appointments have charges entered without having to scroll through different dates on the Schedule. You also want to create and save custom versions of the report via Bookmarks

Report Name: Unbilled Charges for Scheduled Appointments

Exercise A: Open a Report from the landing page 1. Navigate to **Tools > Practice Analytics**. 2. Select **Unbilled Charges for Scheduled Appointments** on the landing page under the Scheduling Reports. 3. The report opens.	*"Missing charges"*
Exercise B: Apply personal changes 1. Filter to show the last **60 days** in the Appointment Date field. 2. Filter, sort, and group the data in a way you want to save as a preference. 3. Drag and drop columns to the desired location in the grid you want to save as a preference.	
Exercise C: Create Bookmarks (saved report) 1. At the bottom right-hand corner of the screen, click the **bookmark** icon. 2. Click Save as a new bookmark. The Save bookmark window opens. 3. Name the bookmark and click **Save**. 4. Click on the home icon to go back to the landing page.	
Exercise D Access Saved Reports 1. Click on **Unbilled Charges for Scheduled Appointments** *(or the report you saved a custom version of)*. 2. At the bottom of the report, click on the **bookmark** icon. 3. Hover to personal bookmarks. 4. Select the report you saved. Your saved version of that report opens.	

Outcome: You can create and save custom versions of the reports that you can easily access.	

Scenario #4: You want to run a report to show total charges by the Rendering Provider. You'll save this report so that you can run it on a regular basis.

Report Name: Transaction Analysis

Exercise 1: Open a Report from the landing page 1. Navigate to **Tools > Practice Analytics** 2. Select the **Transaction Analysis** report on the landing page under the Daily Reports. 3. The report opens.	
Exercise 2: Apply personal changes 1. Enter date criteria. 2. Filter, sort, and group the data in a way you want to save as a preference. 3. Drag and drop columns to the desired location in the grid you want to save as a preference.	
Exercise 3: Export the data 1. Click the **ellipses** in the upper-right corner of the Detailed Report grid. 2. Hover on Export, and select **Excel**. A progress bar opens. 3. When done, the Save As folder opens. 4. Name the report. 5. Select a **folder** to save it to. 6. Click **Save**.	
Outcome: You can export the data from OP. When reviewing on your own, take a look at all of the different columns and filtering available to you!	

Scenario #5: Report Name: Reimbursement Analysis	
Now that you have your tools, Lets run a Reimbursement Analysis to show payments received for particular CPT code(s)	

Exercise 1: Open a Report from the landing page 1. Navigate to **Tools > Practice Analytics** 2. Select the **Reimbursement Analysis** report on the landing page under the Monthly Reports 3. The report opens.	
Exercise 2: Apply personal changes 1. Enter date criteria. 2. Filter, sort, and group the data in a way you want to save as a preference. 3. Drag and drop columns to the desired location in the grid you want to save as a preference.	
Exercise 3: Export the data 1. Click the **ellipses** in the upper-right corner of the Detailed Report grid. 2. Hover on Export, and select **Excel**. A progress bar opens. 3. When done, the Save As folder opens. 4. Name the report. 5. Select a **folder** to save it to. 6. Click **Save**.	
Outcome: You can export the data from OP.	

Scenario #6: Added Bonus! **Practice Analytics Dashboard**

You want to drill down on dashboard visualizations to view and filter the underlying data

Exercise A: Open the dashboard from the landing page. 1. Navigate to **Tools > Practice Analytics** 2. Select the **Practice Overview Dashboard** report on the landing page under the category of **Analytics**. 3. The dashboard opens.	
Exercise B: View the data displayed on Dashboard You can drill down on the visualizations in the dashboards to view and filter the underlying data	
Exercise C: View the underlying data 1. Scroll down to **Appointment Status by %**. 2. Click on a **month** you want to look at further. 3. Right-click and select **Show Underlying Data**. The detailed report opens below the graph.	
Exercise D: Filter to see No Show 1. Click on the down arrow next to the **Visit Status** column. 2. Select **Filter**. 3. Select the toggle button next to **Visit status**. 4. Click the **drop-down**. 5. Select **No Show**. You now have a detailed list of patients for that month who were marked as a No Show appointment.	
Outcome: You can drill down on the visualizations in the dashboards to view and filter the underlying data.	