Centricity Reports, Centricity Analytics & Financial Dashboard

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HealthSystems
Presentation

• Presentation will include:
• Centricity Standard Reports
• Centricity Analytics
• Centricity Financial Dashboard
• HealthSystems Automated Reporting
• Question & Answers
Reports Module Basics

Toolbar - Detail

Folder - Colors
- GE Shipped
- Custom

Report - Colors
- GE Shipped
- Custom
- Criteria
Reports Module

- Accounts Receivable
- Active
- Administrative
- Collections
- Component Specific
- Financial
- Patients
- Schedule
Accounts Receivable

- Aging By...
  - Doctor
  - Financial Class
  - Guarantor
  - Insurance Carrier
  - Patient
- Billing Status
- Claims
- Procedure Date Aging by...
  - Doctor
  - Financial Class
  - Guarantor
  - Insurance Carrier
  - Patient
Active Reports

- Key Reports
- Collections Bad Debt W/O
- Patient/Insurance Bal W/O
- Pat Reg LOC Update
Administrative Reports

- Key Reports
- CO/FAC/PROV Identification
- Security
- User Security
Collections

- Useful tool beneficial for the collection account follow-up process
- These reports are executable with Collection Parameters and/or Visits with the Status of Collections
- Ability to batch print collection letters for patients with overdue balances based upon collection status
Component Specific

- These reports are executable from Specific Components
- These documents do not have criteria to execute from within the Reports Component
Financial Reports

- Key Reports
  - MFS
  - MPA
  - MRA
  - MTS
  - Net Charges By Insurance
  - Net Charges By Provider
Patient

- New Patient Analysis
- Patient Ledger
- Patient Ledger – Detailed
- Recalls
- Visits by Case
Schedule

- Appointments
- Canceled Appointments
- Letters
- Patient Collections
  Appointments
- Schedule
- Superbill
- Waiting List
Suggested Reports

• Daily Reports
• Weekly Report
• Monthly Reports
• Working “AR” Reports
Suggested - Daily Reports

- Schedules
- Superbills
- Patient Profiles
- Daily Balance (by batch or by date)
- Deposit Slip (by batch, by date or by date of deposit)
- Daily Financial Summary (Current Month)
Suggested - Weekly Reports

- Billing Status: Approved Failed, File Rejected, Filed, File Succeeded
- Outstanding Insurance
- Actual Allowed
- Adjustments
- Payments
- Case List
- New Patient Analysis
- Cancelled Appointments
- Schedule – Letters
- Missing Ticket Report (Export)
Suggested - Monthly Reports

- Monthly Production Analysis
- Monthly Financial Summary
- Monthly Revenue Analysis
- Net Charges By Doctor (“Drill Down”)
- Aging Reports
- Reimbursement Analysis (Hard Close - Dependent)
- Reimbursement Summary by DOS
- Insurance Reimbursement Summary
- Tax Summary
- Referring Physician Analysis (“Drill Down”)
Suggested - Working A/R Reports

• Accounts Receivable Folder
  – Credit Balance
  – Guarantor Balance
  – Outstanding Insurance

• Administrative Folder
  – Correspondence Audit Report

• Collections Folder
  – Account Balances
  – Insurance Delinquency
  – Patient Delinquency

• Patient Folder
  – Patient Ledger
  – Patient Ledger Detailed
Optimizing Report Usage

- Creating Saved Criteria
- Creating Folders
- Security
- Closed Date Dependent Reports
- Drilling Down in Reports
- Customizing Letters
- Tips and Tricks
- Reports the Balance
- Custom Reports
Usage - Creating Saved Criteria

- Enables consistency in reporting results
- Improves efficiency
Usage - Creating Saved Criteria

Financial Reports

- Date of Entry
- Date Range Macro
  - Today +/-1, Month-1
- Report Setup
  - + value = right or down
  - - value = left or up
- “?” Tool Bar Icon
Usage - Creating Folders

- Daily Reports
- Working AR Reports
- Month End Reports
- Specific Staff
- Print all Reports in a Folder with one Print command
Usage - Security

- After creating saved criteria reports, assign security to User/Groups to customized folders
  - To determine access to specific reports/folders
  - To limit access to specific reports/folder
  - To create a consistency on reporting results
Usage – Hard Closed Date Dependent

• File Menu
  – Reports, Patient Information & Visit
  – Statements

• Financial Folder
  – Reimbursement Analysis by Financial Class
  – Reimbursement Analysis by Insurance
Usage - Drill Down Reports

- Isolates data onto a separate page
- Available inside:
  - Accounts Receivable Folder
  - Administrative Folder
  - Collection Folder
  - Financial Folder
  - Patient Folder
  - Schedule Folder
Usage - Customized Letter

• Collection Letters
• Recall Letters
• Reminder Letters
• Labels
Usage - Reports Tips & Tricks

- Deposits are not included in all reports
- Remember deposits do not age on the aging reports, but they do reduce the total A/R amount
- Unapplied funds are not included in all reports
- All reports are exportable
Usage - Reports that Balance

- Daily Balance = Daily Financial Summary (DOE)
- Daily Financial Summary = Daily Transaction Summary (DOE)
- Monthly Financial Summary = Monthly Transactions Summary (DOE)
- Ending AR (Monthly Summaries) = Procedure Date Aging

*DOE = Date of Entry
Centricity Analytics at a Glance

• Benefits of Analytics
• How Analytics Works
• Some Useful Purposes
• How to Create a Report
Benefits of Centricity Analytics

- Business Intelligence…Data Mining…Decision-Support…Financial Analysis…Data Warehousing
- No Crystal Report development
- Runs on your existing Centricity server – no additional hardware or software required (except MS Excel)
- Build customized views of data and modify them interactively…save and refresh or build off saved reports
- Identifies trends and potential issues
- Easy point and click, drag and drop access to financial information in your practice
- No impact on your practice while you run a report – runs on copy of database
- Microsoft Excel is a skill most of us already have making reports familiar and easy to use
How Does Analytics Work?

- The nightly job extracts and summarizes key financial information from your Centricity PM database and loads into the Centricity Analytics Data Warehouse.
- Data is stored in an “OLAP Cube” – which is a data storage format that significantly enhances the ability to analyze and data-mine information.
How Does Analytics Work?

• Access to the Centricity Analytics data is done using the Pivot Table feature of Microsoft Excel, which allows you to quickly and easily create numerical and graphical representations of your data. Save your data views and refresh at a later time.

• Create your own custom patient & transaction-level reports & queries using the Analytics Views and the Microsoft Query feature of Excel.
Successful Management

• For successful management in today’s healthcare organizations, access to timely and accurate information is critically important.

• Centricity Analytics provides Doctors, Administrators and Office Managers with an intuitive and flexible tool to help manage this complex environment.

• Centricity’s easy-to-use interface simplifies the process of navigating through detailed data in order to isolate the information that will help organizations evaluate revenue and production, detect undesired utilization trends and investigate business opportunities.
Useful Reporting

• Revenue and Financials
  – Monthly Productivity and Revenue
  – Quarterly Comparisons
  – Annual Comparisons

• Ancillary Services
  – Tracking Revenue
  – Tracking Production
  – Tracking Patients

• Contracting
Numbers Don’t Lie
Centricity Analytics “Dimensions”

- Doctors
- Facilities & Places of Service
- Financial Classes
- Insurance Carriers & Groups
- Companies
- Resources
- Referring Doctors
- Appt Types
- Adjustment Types
- Entry Dates
- Service Dates
- CPT Codes & Departments
- Diagnoses
- Modifiers
- Patient City, State & Zip
- Patient Visit Ages
- Patient Genders
Centricity Analytics “Measures”

- Charges
- Payments
- Adjustments
- RVU’s
- Insurance Allowed
- Visit Balances

- Patient Visit Counts
- Procedure Counts
- Cash Collection %’s
- Month-to-Month & Year-to-Year Trending
- Over 200 Calculations
Centricity Analytics “Views”

• What are Analytics Views?
  – Contain Patient & Transaction-level information
  – Quickly & easily create customized detail queries using Microsoft Excel
  – Choose from dozens of data fields…apply filters…identify sort fields…view & manipulate your data in Excel
  – Each view provides a different subject area of information

• Available Analytics Views:
  – Patient Demographic
  – Charge & Payment Transaction Detail
  – Balance & Summaries – Patient, Patient Visit, Patient Visit Procedure
  – Appointments & Recall Appointments
OLAP CUBES
# Centricity Financial Analytics – Sample

<table>
<thead>
<tr>
<th>Service Dates</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Classes</td>
<td>All Financial Classes</td>
</tr>
<tr>
<td><strong>Doctor Name</strong></td>
<td><strong>Cptcode</strong></td>
</tr>
<tr>
<td><strong>Jackson MD, Kevin</strong></td>
<td>99211</td>
</tr>
<tr>
<td></td>
<td>99212</td>
</tr>
<tr>
<td></td>
<td>99213</td>
</tr>
<tr>
<td></td>
<td>99214</td>
</tr>
<tr>
<td></td>
<td>99215</td>
</tr>
<tr>
<td><strong>Jackson MD, Kevin Total</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Olsen MD, Robert</strong></td>
<td>99211</td>
</tr>
<tr>
<td></td>
<td>99212</td>
</tr>
<tr>
<td></td>
<td>99213</td>
</tr>
<tr>
<td></td>
<td>99214</td>
</tr>
<tr>
<td></td>
<td>99215</td>
</tr>
<tr>
<td><strong>Olsen MD, Robert Total</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Thompson MD, Janet L</strong></td>
<td>99212</td>
</tr>
<tr>
<td></td>
<td>99213</td>
</tr>
<tr>
<td></td>
<td>99214</td>
</tr>
<tr>
<td></td>
<td>99215</td>
</tr>
<tr>
<td><strong>Thompson MD, Janet L Total</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

![Chart](chart.png)
You can use the Financial Dashboard to view high-level financial key performance indicators.
Financial Dashboard

• Accessing the Financial Dashboard
  – To access from the main menu or the module toolbar, you will need the Dashboard > View Dashboard permission
Financial Dashboard

• Accessing the Financial Dashboard
  – To view Financial Dashboard graphs by Date of Service or Date of Entry, or to include or exclude inactive providers, facilities, or companies, you will need the Dashboard > Edit dashboard default...
Viewing Key Performance Indicators

- Eight Metrics reside in two tabs
  - Accounts Receivable and Revenue/Visits
Viewing Key Performance Indicators

• Accounts Receivable metrics
  – Charges, Payments, Adjustments
  – Aggregate Days in Accounts Receivable
  – Days in Accounts Receivable by Insurance Group
  – Days in Accounts Receivable by Financial Class

• Revenue/Visits metrics
  – Gross Charges by Provider
  – Number of Visits
  – Percentage Billing Status
  – Percentage Billing Status by Balance
View Metrics

• Standard grid view or expand a single metric to cover the entire dashboard desktop
View Metrics

• To fully expand your graph view, clear the Show Legend checkbox (top right corner) for the metric or right-click and choose Hide Legend

• To view the exact value of the data, hover over a color within the graph
# Metrics Balances to Reports Table

<table>
<thead>
<tr>
<th>This Dashboard metric</th>
<th>Balances to this report</th>
<th>Under these conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregate days in Accounts Receivable</td>
<td>Monthly Financial Summary</td>
<td>Run by the same date of service or date of entry</td>
</tr>
<tr>
<td>Charges, payments, adjustments</td>
<td>Daily Financial Summary or Monthly Financial Summary</td>
<td>Run by the same date of service or date of entry</td>
</tr>
<tr>
<td>Days in Accounts Receivable by financial class</td>
<td>Adjustments report, grouped by financial class</td>
<td>Run by the same date of service or date of entry</td>
</tr>
<tr>
<td>Days in Accounts Receivable by insurance group</td>
<td>Adjustments report, grouped by insurance group</td>
<td>Run by the same date of service or date of entry</td>
</tr>
<tr>
<td></td>
<td>Payments report, grouped by insurance group</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reimbursement Summary by Financial Class report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Net Charges by Insurance report</td>
<td></td>
</tr>
</tbody>
</table>
## Metrics Balances to Reports Table

<table>
<thead>
<tr>
<th>This Dashboard metric</th>
<th>Balances to this report</th>
<th>Under these conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross charges by provider</td>
<td>Monthly Production Analysis report, Monthly Quantity subtotal OR Daily Financial Summary report, grouped by provider</td>
<td>Run by the same date of entry or date of service</td>
</tr>
<tr>
<td>Number of visits</td>
<td>Billing Status report</td>
<td>Run by the same visit date or last filed date</td>
</tr>
<tr>
<td>Percentage visit status</td>
<td>Billing Status report, grouped by status</td>
<td>Run by the same visit date or last filed by date</td>
</tr>
<tr>
<td>Percentage visit status by balance</td>
<td>Billing Status report, grouped by status</td>
<td>Run by the same visit date or last filed date</td>
</tr>
</tbody>
</table>
Filtering Options

- Providers
- Facilities
- Companies

Expand the Provider, Facility, and Company filters to view metrics specific to your selections. Default: all providers, facilities, and companies are included. When you apply filters, it applies to all metrics on the Dashboard.
Financial Dashboard Settings

• **Settings Window**
  - Selections apply to all Financial Dashboard users
  - Access to the Settings window requires the Dashboard > Edit dashboard default settings permission
Financial Dashboard Settings

Using Settings
- Include or exclude inactive providers, facilities, or companies
- View charges by Date of Service or Date of Entry
- View visits by Last Filed Date or Visit Date

The Settings window allows you to set global preference views.
Customizing Your Layout

• Preferred Dashboard Layout
  – Save Layout button in bottom left corner of the Dashboard
  – Choose metrics and filter options you want to see
  – Save layout as the Dashboard default view
Customizing Your Layout

• Dynamic Dates
  – Metric data changes according to dynamic date set from the To Date drop-down
  – Example: Dynamic Date is June 17, 2011, save layout, open Dashboard on June 20, 2011, metric To Date will display 06/20/11
Automated Reporting

- Daily Reports
- Monthly Reports
- Annual Reports
Questions & Answers

Thank you for attending!

We value your feedback – Please Complete Surveys

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