Centricity Reports, Centricity Analytics & Financial Dashboard

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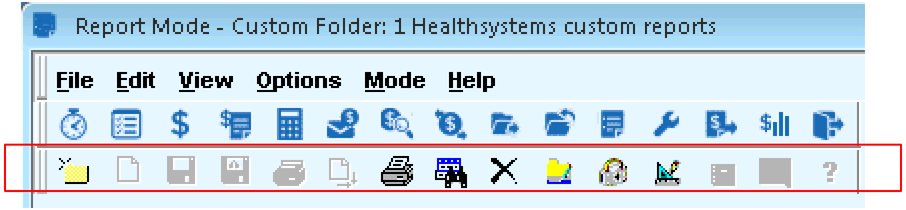
Presentation

- 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

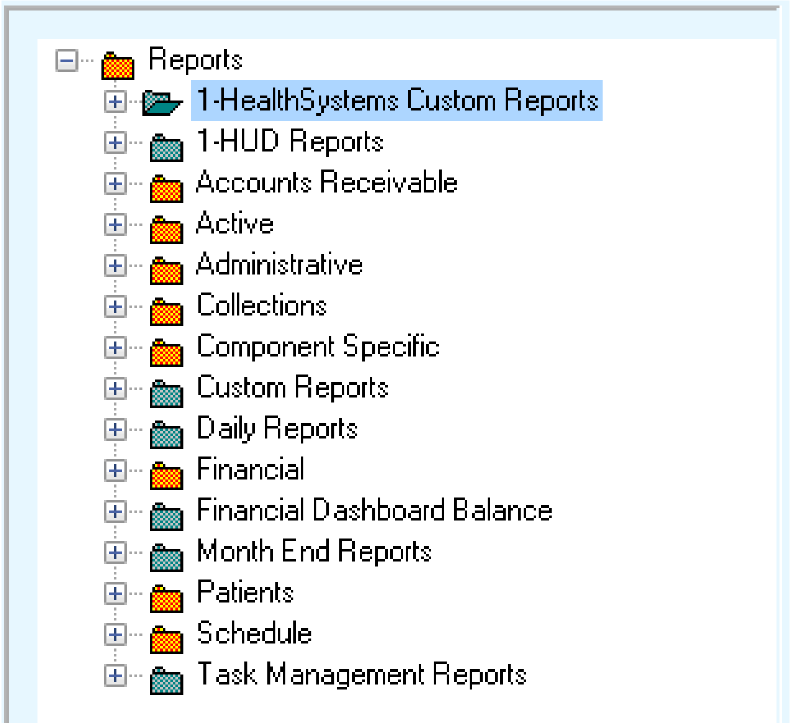
GE Shipped

Custom

Criteria

Reports Module

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



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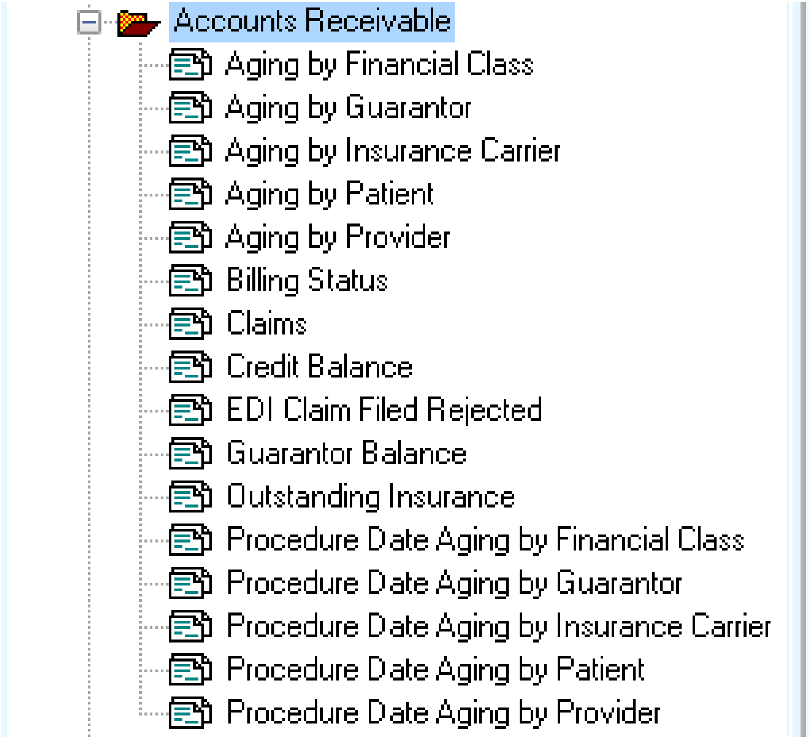
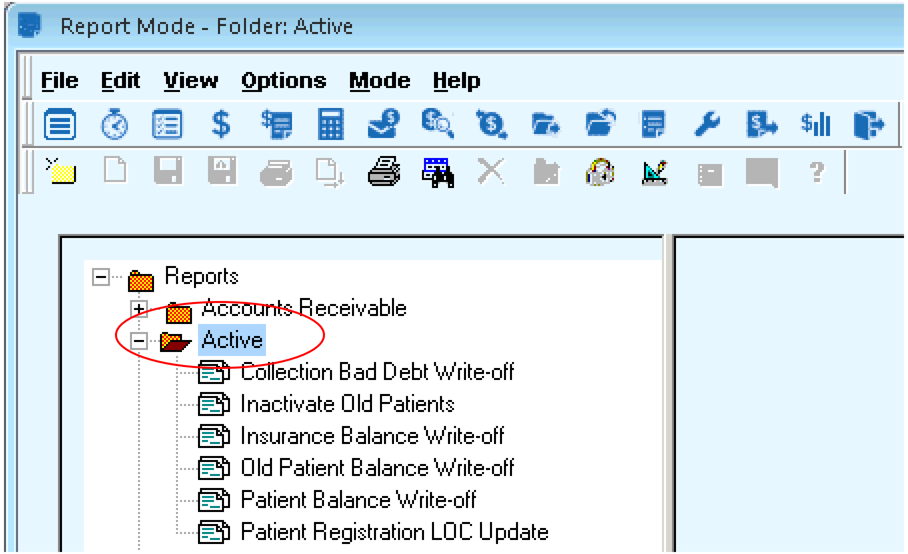
Accounts Receivable

- 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



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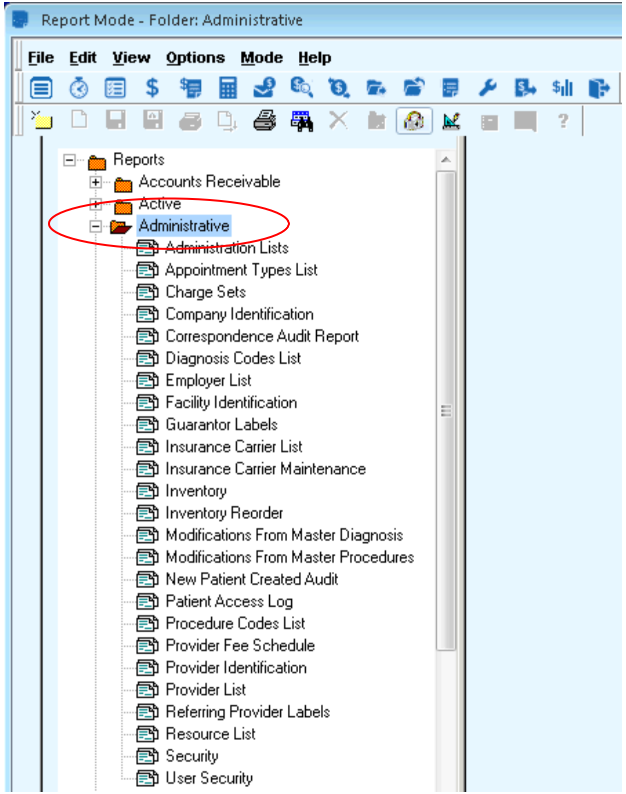
Administrative Reports

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



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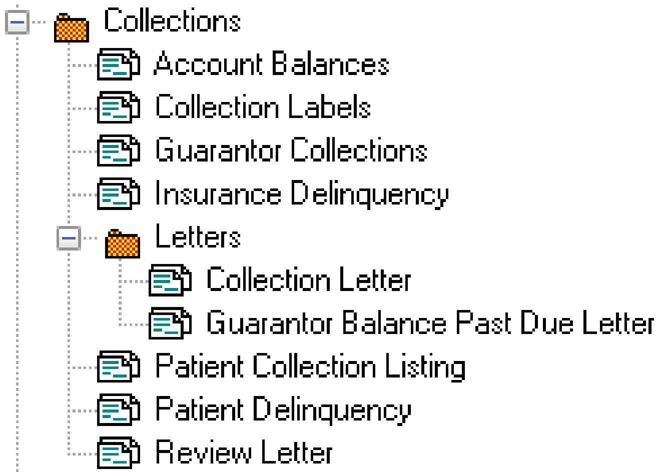
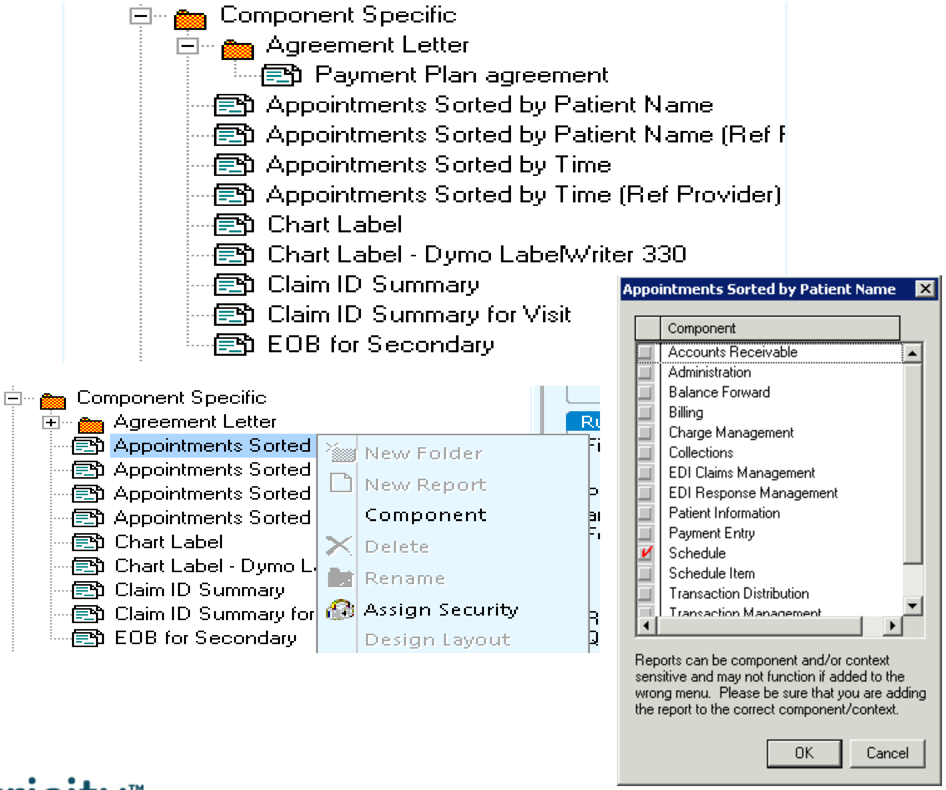
Collections

- 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



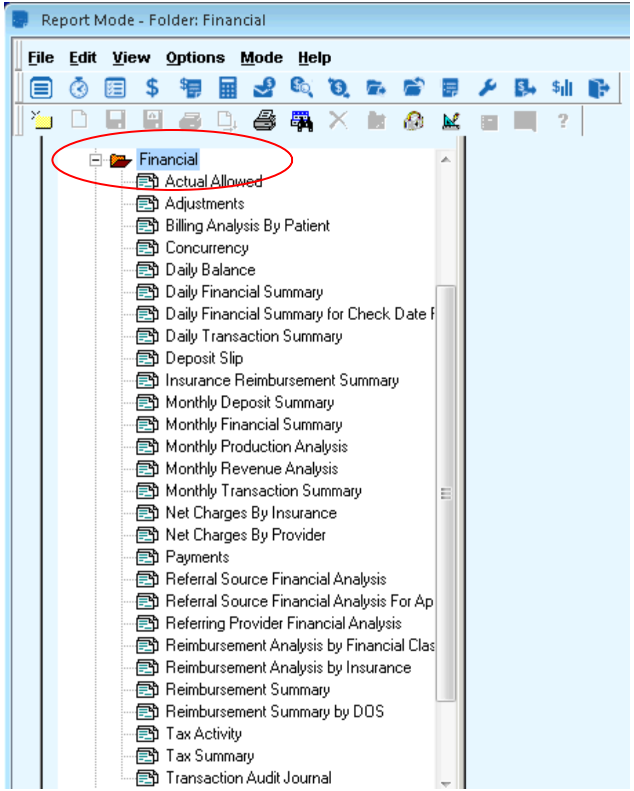
Component Specific

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



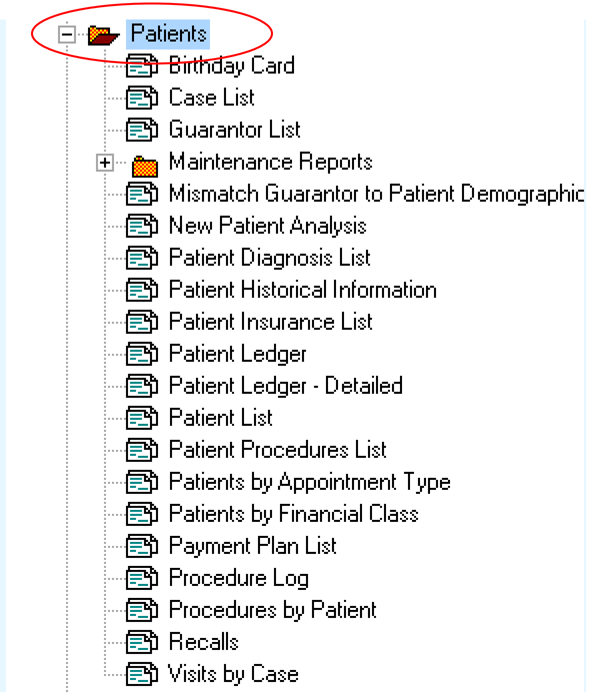
Financial Reports

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



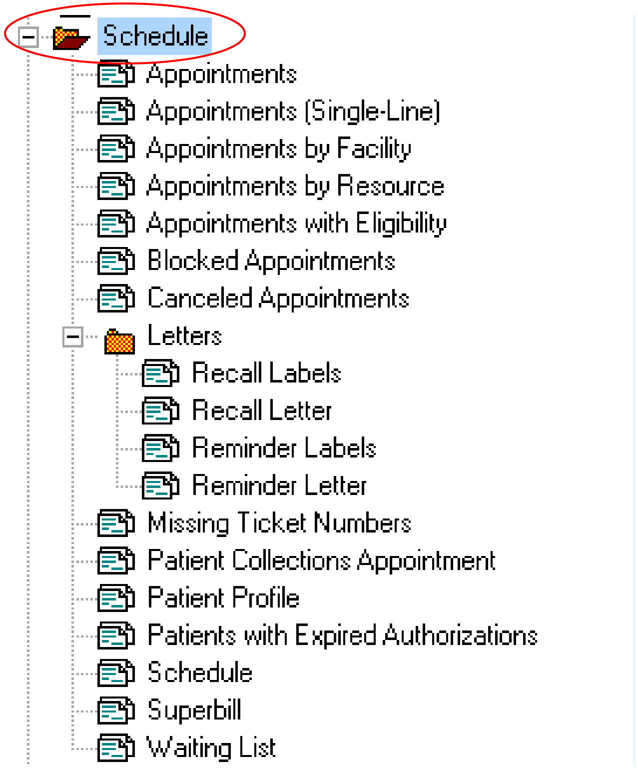
Patient

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



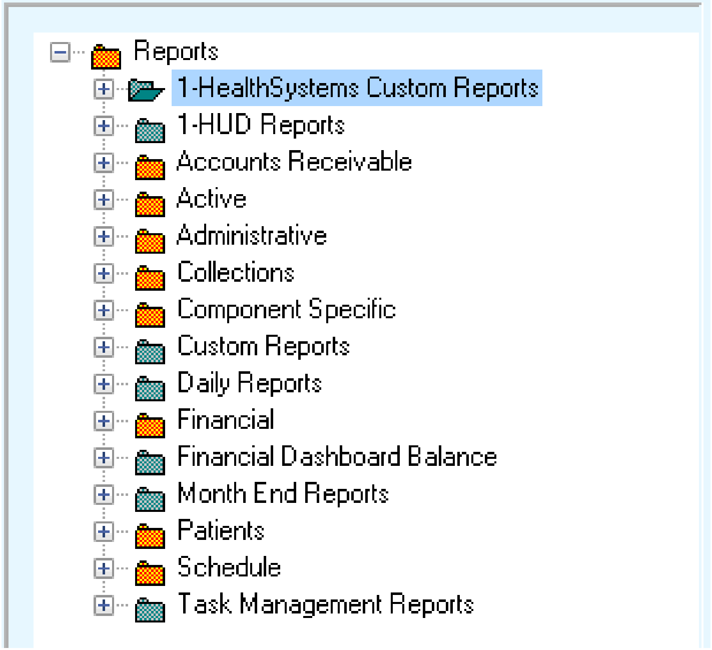
Schedule

- 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

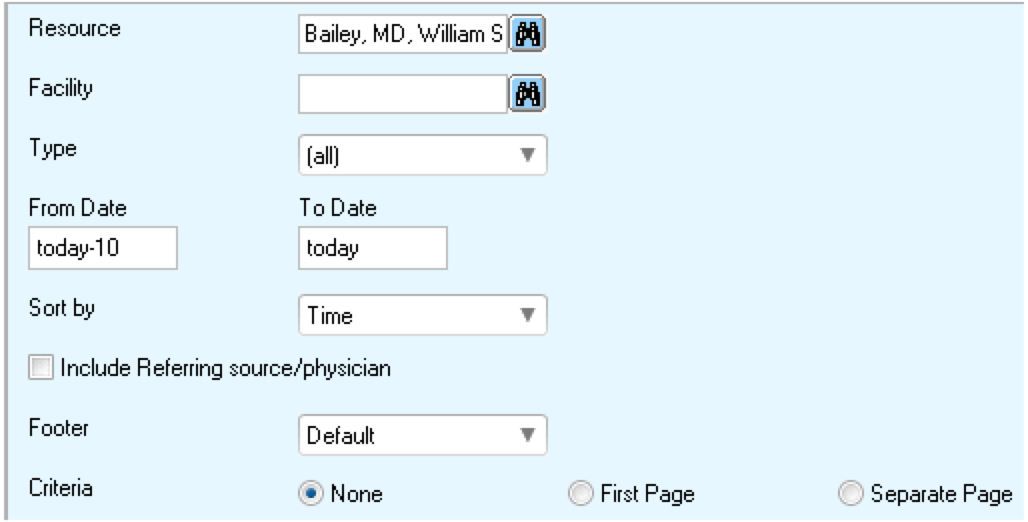
- Accounts Receivable Folder
  - Credit Balance
  - Guarantor Balance
  - Outstanding Insurance
- Administrative Folder
  - Correspondence Audit Report
- Collections Folder
  - Account Balances
  - Insurance Delinquency
  - Patient Delinquency
- Patient Folder
  - Patient Ledger
  - Patient Ledger Detailed

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

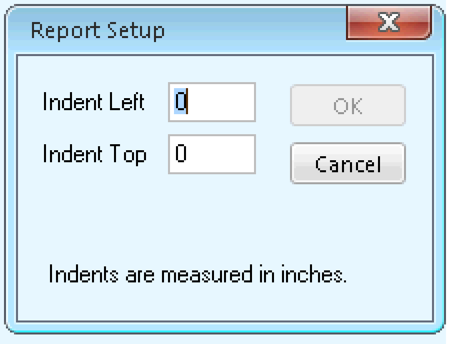
- Enables consistency in reporting results
- Improves efficiency



Usage - Creating Saved Criteria

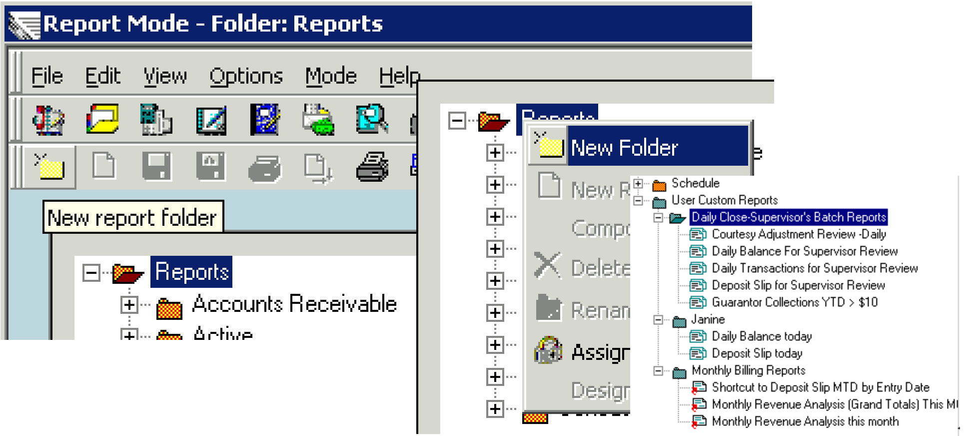
Financial Reports

- 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



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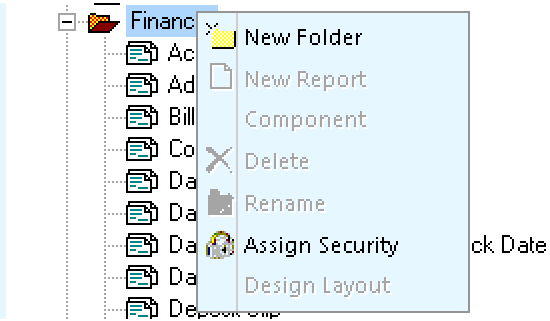
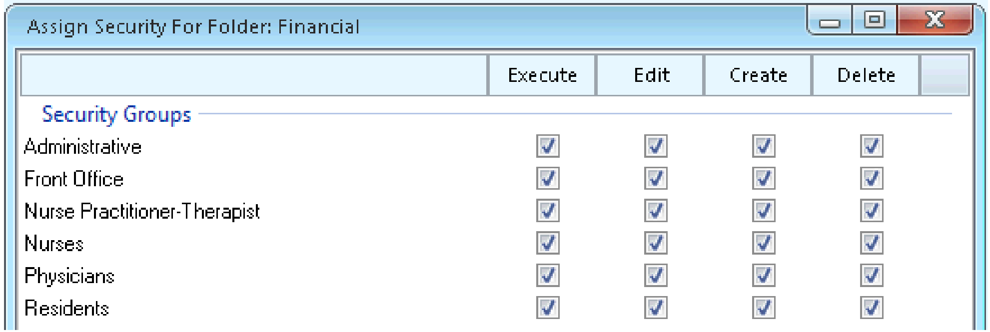
Usage - Security

- 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





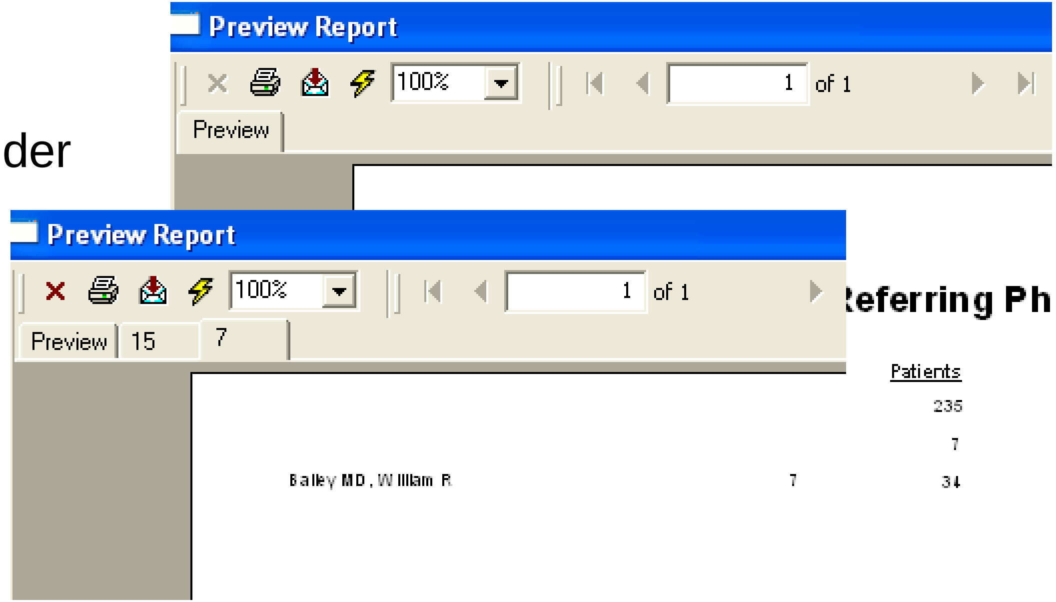
Usage – Hard Closed Date Dependent

- 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

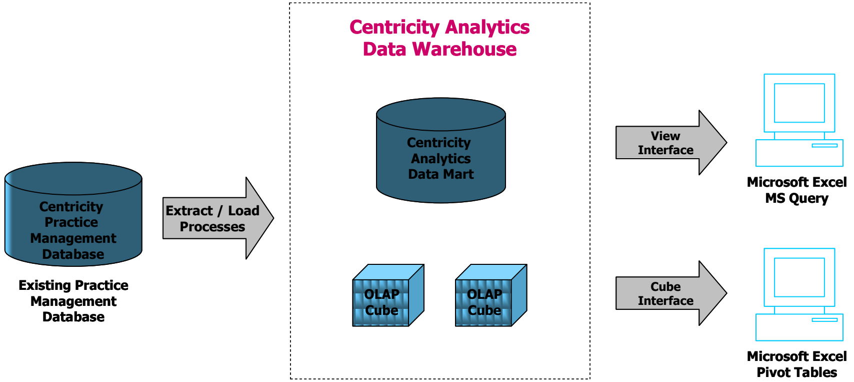
- Benefits of Analytics
- How Analytics Works
- Some Useful Purposes
- How to Create a Report

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

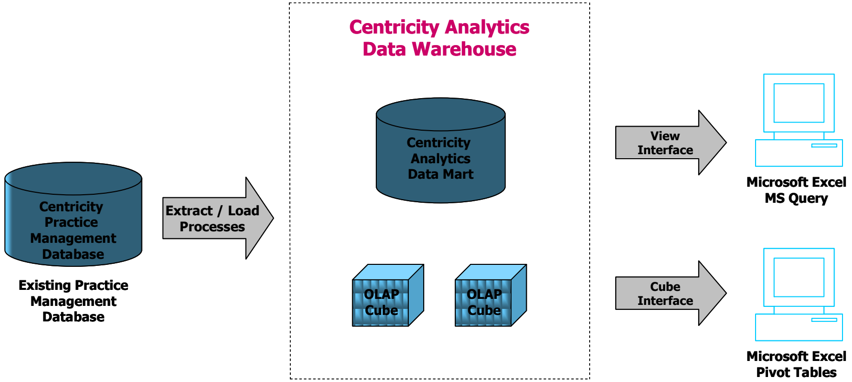
How Does Analytics Work?

- 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

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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"

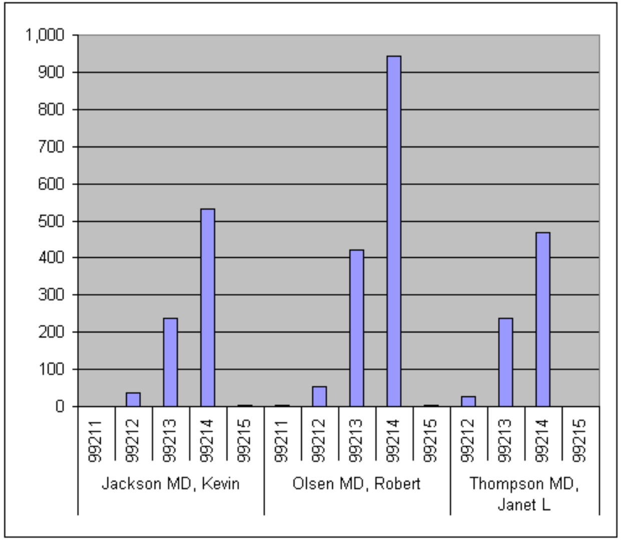
- What are Analytics Views?
  - Contain Patient & Transaction-level information
  - Quickly & easily create customized detail queries using Microsoft Excel
  - Choose from dozens of data fields…apply filters…identify sort fields…view & manipulate your data in Excel
  - Each view provides a different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

Service Dates	2005
Financial Classes	All Financial Classes

Doctor Name	Cptcode	# Procs
Jackson MD, Kevin		
	99211	1
	99212	36
	99213	238
	99214	532
	99215	5
Jackson MD, Kevin Total		812
Olsen MD, Robert		
	99211	4
	99212	53
	99213	421
	99214	942
	99215	3
Olsen MD, Robert Total		1,423
Thompson MD, Janet L		
	99212	26
	99213	238
	99214	467
	99215	1
Thompson MD, Janet L Total		732
Grand Total		2,967



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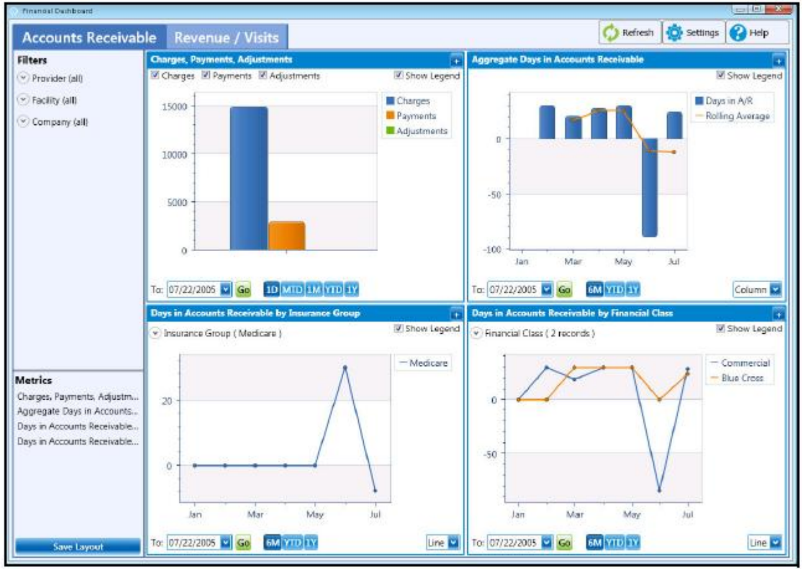
Financial Dashboard

- You can use the Financial Dashboard to view high-level financial key performance indicators.



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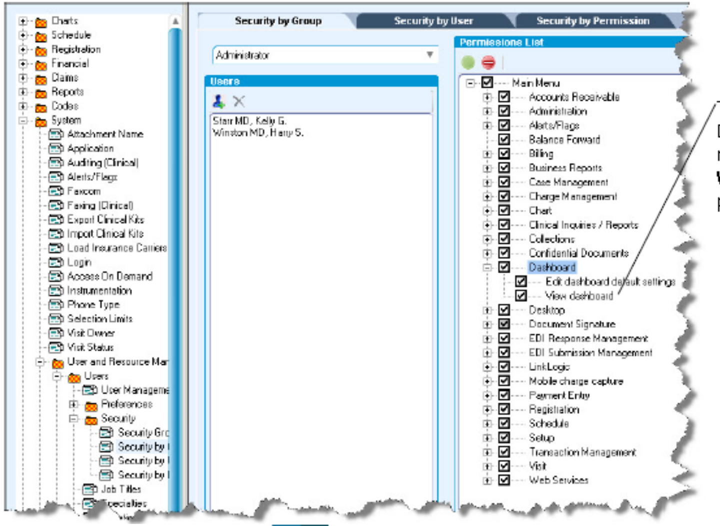
Financial Dashboard

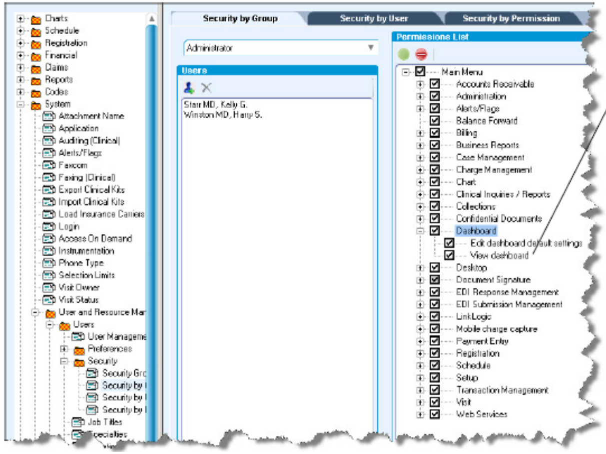
- Accessing the Financial Dashboard
  - To access from the main menu or the module toolbar, you will need the Dashboard > View Dashboard permission



To view the Financial Dashboard, users must have at least the **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



To view the Financial Dashboard, users must have at least the **View dashboard** permission.

Viewing Key Performance Indicators

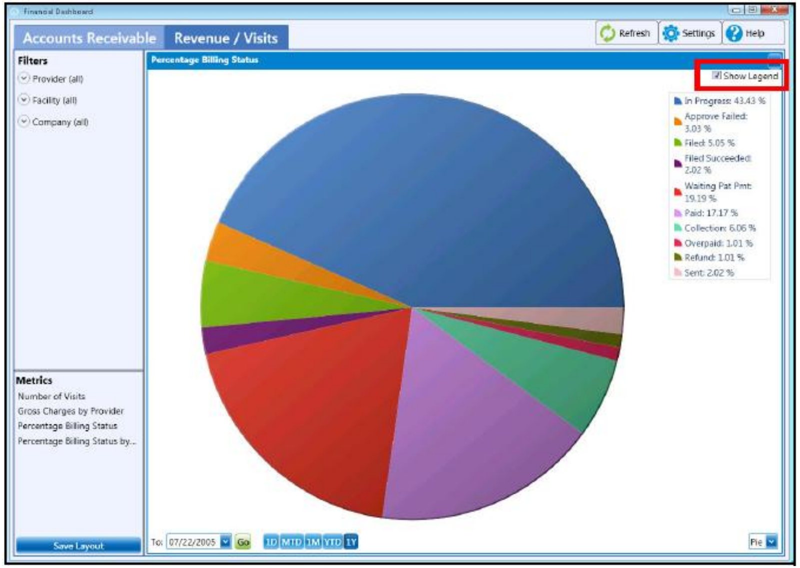
- Eight Metrics reside in two tabs
  - Accounts Receivable and Revenue/Visits

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



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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

This Dashboard metric	Balances to this report	Under these conditions
Aggregate days in Accounts Receivable	Monthly Financial Summary	Run by the same date of service or date of entry
Charges, payments, adjustments	Daily Financial Summary or Monthly Financial Summary	Run by the same date of service or date of entry
Days in Accounts Receivable by financial class	Adjustments report, grouped by financial class Payments report, grouped by financial class Reimbursement Summary by Financial Class report	Run by the same date of service or date of entry
Days in Accounts Receivable by insurance group	Adjustments report, grouped by insurance group Payments report, grouped by insurance group Net Charges by Insurance report	Run by the same date of service or date of entry

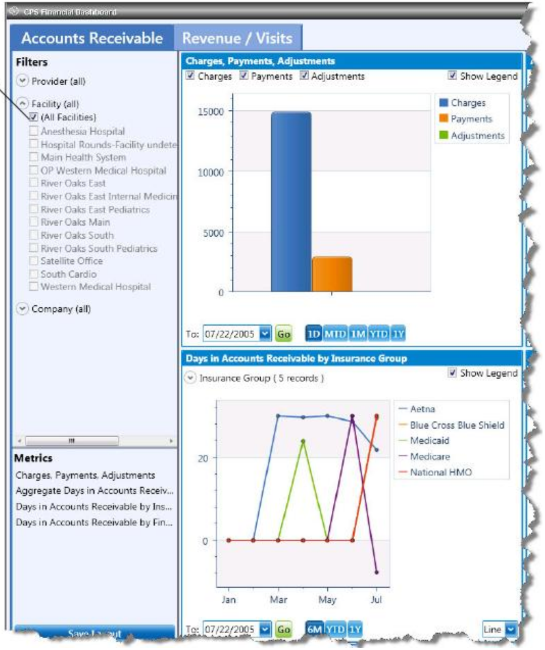
Metrics Balances to Reports Table

This Dashboard metric	Balances to this report	Under these conditions
Gross charges by provider	Monthly Production Analysis report, Monthly Quantity subtotal OR Daily Financial Summary report, grouped by provider	Run by the same date of entry or date of service
Number of visits	Billing Status report	Run by the same visit date or last filed date
Percentage visit status	Billing Status report, grouped by status	Run by the same visit date or last filed by date
Percentage visit status by balance	Billing Status report, grouped by status	Run by the same visit date or last filed date

Filtering Options

- Filter across all metrics to view any combination of:
  - Providers
  - Facilities
  - Companies

Expand the Provider, Facility, and Company filters to view metrics specific to your selections. By default, all providers, facilities, and companies are included. When you apply a filter, it applies to all metrics on the Dashboard.



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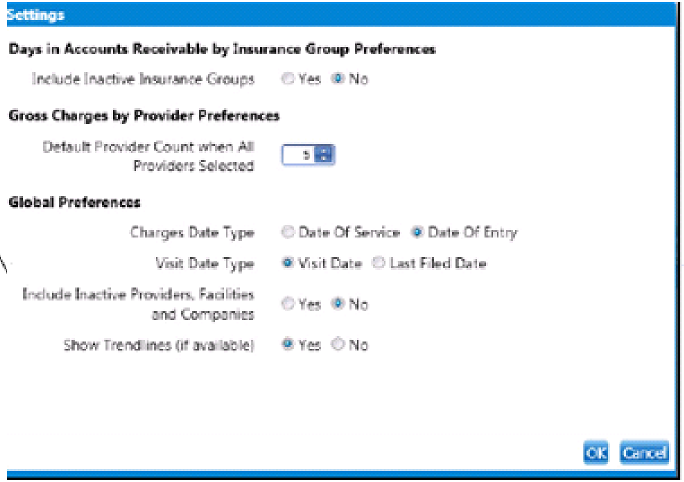
Financial Dashboard Settings

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

The Settings window allows you to set global preference views.



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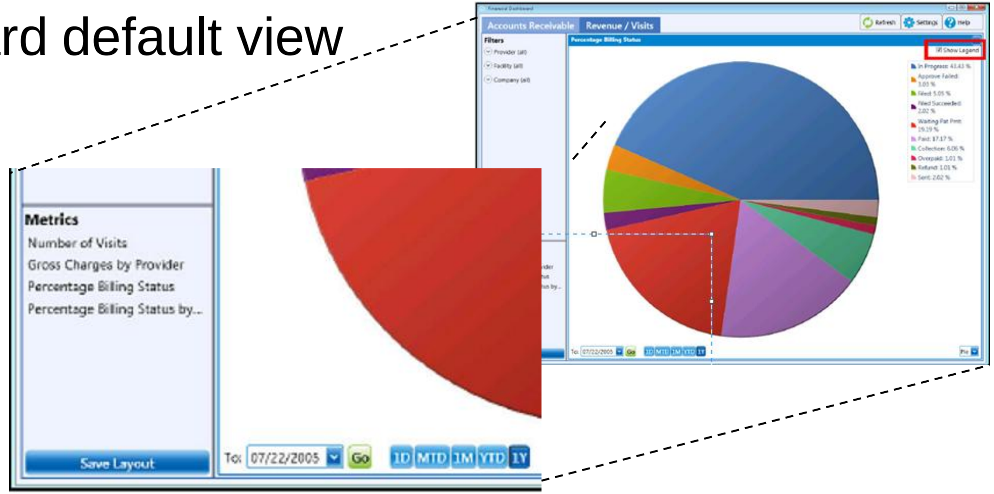
Financial Dashboard Settings

- 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.

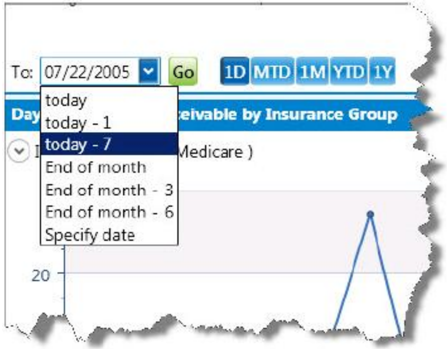
Customizing Your Layout

- 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



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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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