

We are currently updating the OP Help Center content for the release of OP 14.19 or OP 19. OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

Billing Transaction Analysis: Transactions

Last Modified on 08/30/2019 4:23 pm EDT

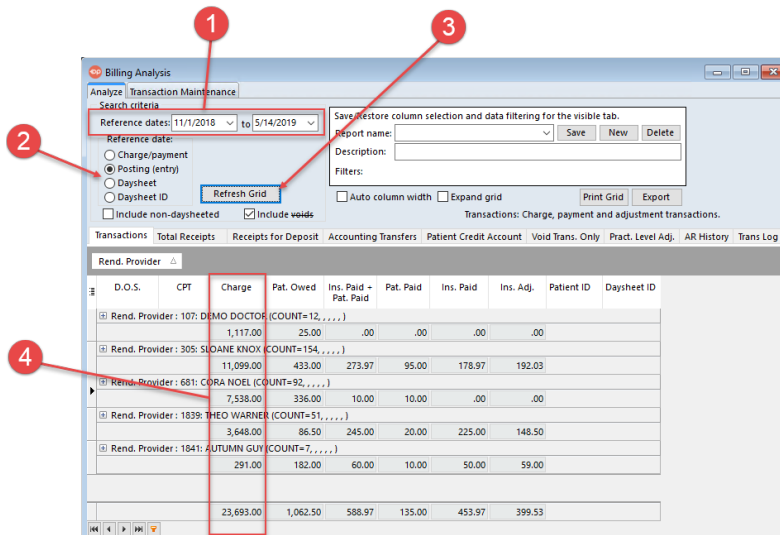
Version 14.19

When to Use this Report

The Billing Transaction Analysis report is commonly used for:

- Financial Summary Reporting
- CPT Utilization

Use this report to view your charges, payments, or adjustments for a day, a week, a month, or any time frame that you wish to isolate your data. For example, if you wish to look at all charges that were posted into the system for a period of a week, select the **date range** to be a one week period (1), select your reference to be Posting (entry) (2), click the **Refresh Grid** (3), and view the Charge column (4).




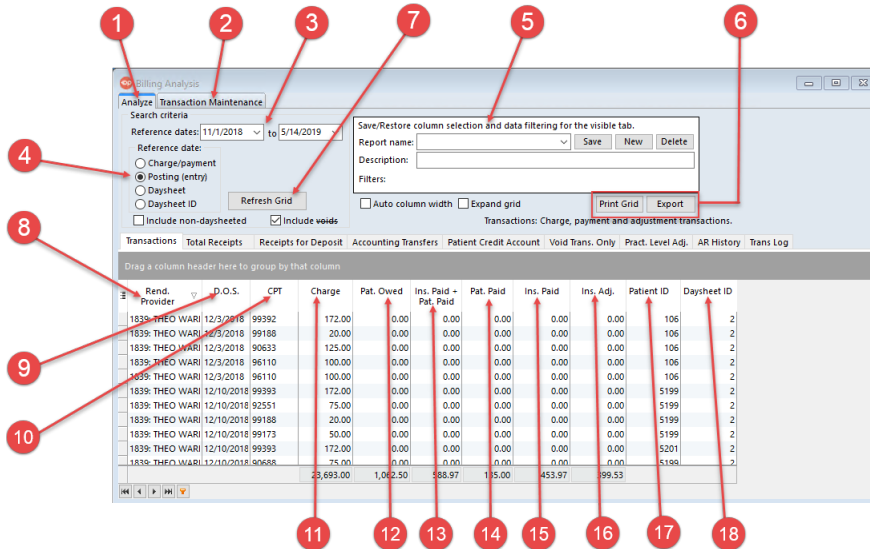
All daysheeted (archived) transactions for the time period the user requested the system to recall are displayed.

About Billing Analysis: Transactions

Path: Billing tab > Transactions button > Transaction Analysis > Transactions tab

This report shows charges, payments, and adjustment transactions for a specified time frame based off of grid criteria (Charge/Payment date, Posting (Entry), Daysheet, Daysheet ID). The grid is customizable. You can add/remove columns, group data, and filter data. These reports can be created and saved for future use. Reports can also be printed or exported to excel. The CPT Activity Reports (when Charge/Payment Date is selected) are best indicated by date of service. The CPT Productivity report (when Daysheet is selected) is based on the effective daysheet date and provides provider productivity breakdowns and insurance plan breakdowns.

Note: More columns are available in the data grid than shown in the map below. The map only describes the columns displayed in the map. To see the total list of columns, select the column selection icon in the upper-left area of the grid ().



Billing Analysis: Transactions Map

Number	Section	Description
1	Analyze tab	The Analyze tab displays transactions for particular categories based on set search criteria. It creates a financial report with each transaction having its own entry.
2	Transaction Maintenance tab	The Transaction Maintenance tab shows transactions where the logged-in user is either the Rendering, Billing, Supervising, or Service Provider. Transactions can be updated with the name of the rendering provider (REND_ADDR_ID) of the charge that was paid in this tab. Only transactions with a null value are updated from this tab (where REND_ADDR_ID=null or 0).
3	Reference dates (range)	The Reference Dates set the start and end date for the displayed report's date range. Reports that meet the criteria and fall within the selected date range are displayed in the standard reports grid.
4	Report Reference Criteria	<p>The Report Reference Criteria settings filters the information that is displayed in the grid after selecting a reference date criteria. The selections include:</p> <ul style="list-style-type: none"> • Charge/payment: This report pulls the data based on the charge date (usually the date of service) and payments and adjustments according to their payment date (which can be backdated at the time of posting). The Charge/Payment displays CPT activity reports. • Posting (entry): This report accesses charges, payments, and transactions that have a posting date within the time frame selected. The Posting (Entry) selection displays when a transaction was attached to the patient account.

		<ul style="list-style-type: none"> • Daysheet and Daysheet ID: This grid displays charges, payments, and adjustments according to the date or ID that they were processed on a daysheet. The Daysheet selection displays the CPT productivity in the grid. The Daysheet ID selection displays the grid based on the OP assigned ID# when a daysheet is processed.
5	Report Template Recorder	Once a grid is customized, you can save the report layout as a template using the Report Template Recorder. You can Save/Restore column selections and data filtering for the visible tab.
6	Print/Export functions	The Print Grid and Export buttons are used to print the grid (using the Print Grid button) or Exporting the data to Excel (using the Export button).
7	Refresh Grid button	The Refresh Grid button displays the latest data in the grid based upon the Reference Dates and Report Reference Criteria filter selections.
8	Rendering Provider	The Rendering Provider column lists the name of the provider for the transaction.
9	Date of Service	The Date of Service column lists the date of service for the indicated transaction.
10	CPT	The CPT Code column lists the medical code for the visit on the date of service.
11	Charge	The Charge column displays the total charges from the provider for the selected transaction.
12	Patient Owed	The Patient Owed column indicates the amount owed by the patient.
13	Insurance Paid + Patient Paid	The Insurance Paid + Patient Paid column displays the total amount paid by the insurance carrier and the patient (adding the Insurance Paid and Patient Paid columns together).
14	Patient Paid	The Patient Paid column displays the total amount paid by the patient.
15	Insurance Paid	The Insurance Paid column displays the amount paid by the insurance carrier.
16	Insurance Adjustment	The Insurance Adjustment column indicates the amount of the insurance adjustment that was written off for a particular CPT code.
17	Patient ID	The Patient ID column displays the patient identifier for the indicated transaction.

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Daysheet ID

The Daysheet ID column displays the daysheet identifier for the indicated transaction.

Limitations of Billing Transaction Analysis

The limitations to using the Billing Transaction Analysis include:

- Determining Payments for specific CPT Codes.
- Patient payments based on applied credits; not credits received (the Receipt for Deposit tab reconciles this).
- Dates are critical for Accurate Reporting (though this isn't a true limitation, it is still considered a limitation).
- Counts are based on the number of transactions.

Best Practice Suggestions for Financial Reporting

Use the posting (entry) date as the Reference date.

- Avoid backdating.
- Run a daysheet daily. Running daysheets daily protects the integrity of every practice's financial data from human error and deliberate adjustment.
- Regularly monitor financial and productivity reports.

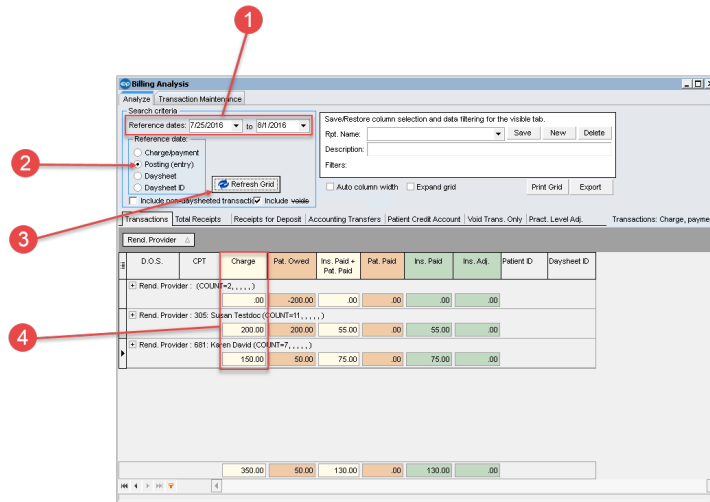
Version 14.10

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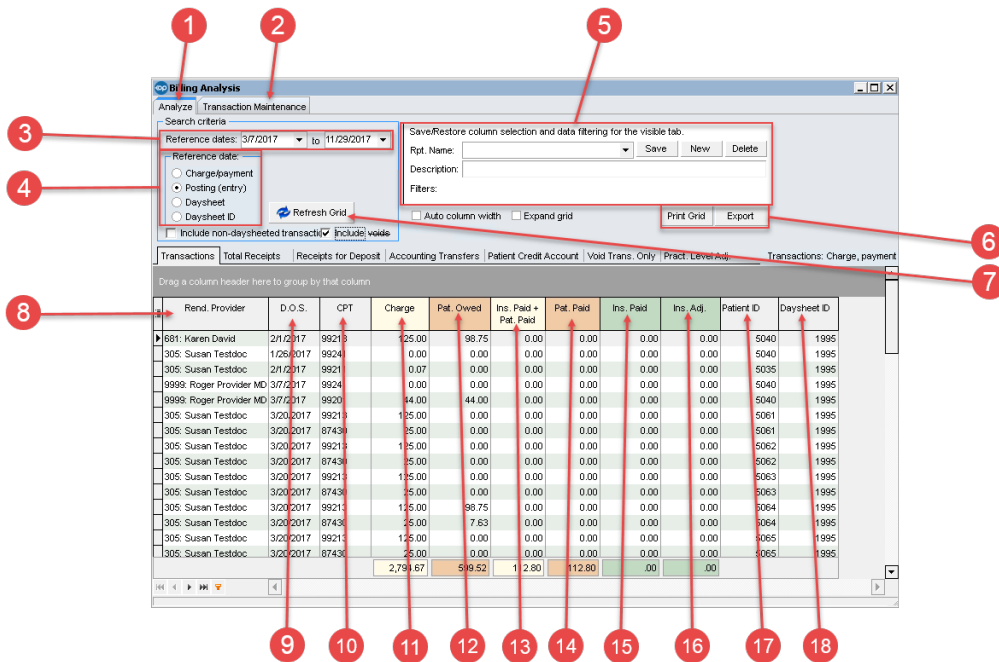
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About Billing Analysis: Transactions

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