Navigating Financial Analytics in OP

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☁ This is a contracted feature available to OP Cloud Practices. Contact your Client Account Manager for more information.

About

The Financial Analytics dashboards are a contracted feature for non-RCM Practices. To inquire about implementing Financial Analytics in your Practice, contact your Client Account Manager. The information below provides details about how to navigate the Financial Analytics dashboards.

Getting to the Dashboards

The Financial Analytics dashboards are accessed by navigating to the **Tools tab > Financial Analytics** button. In the Financial Dashboards window, the Dashboard drop-down is where the different available dashboards are selected. For more information about the content of the individual dashboards, see **OP Financial Analytics**.

Filtering the Dashboards

The following filter options are available in all of the dashboards with the exception of the A/R History dashboard and the Worklist dashboards:

- **Date Range**: 30 days, 60 days, 90 days, Custom Date Range
    - To set a Custom Date Range, select the radio button to open the Dashboard Parameters window where you will enter a Start and End Date, and click **Submit** to apply the date range.
- **Providers**: By default, all Providers are displayed. To change this, use the drop-down and deselect the All checkbox. Then, proceed with selecting the checkboxes for the Providers you want to view. When you're done, click outside of the drop-down to apply your selections.
- **Locations**: By default, all Locations are displayed. To change this, use the drop-down and deselect the All checkbox. Then, proceed with selecting the checkboxes for the Location(s) you want to view. When you're done, click outside of the drop-down to apply your selections.

Drilling Down in the Dashboards

Each dashboard, with the exception of the Worklists, features a graph that can be drilled down several levels by simply clicking directly on the graph. To go back a level, use the back arrow located in the upper right-hand corner of the dashboard widget.

Here's How

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