Financial Analytics: Understanding the Data and How to Compare It to OP Data

Last Modified on 10/15/2021 4:29 pm EDT

Version 20.14

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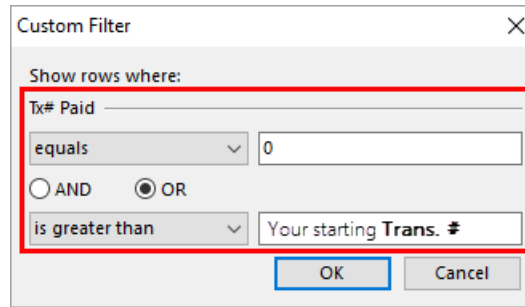
About

The dataset for OP Financial Analytics includes three full calendar years in addition to the present year. Meaning, *prior* to January 1, 2022, the first date in the dataset is January 1, 2018 and after January 1, 2022, the first date in the dataset is January 1, 2019.

Compare Dashboard Data to OP Data

> **Path: Billing tab > Transactions drop-down > Transaction Analysis**

OP Financial Analytics reference the same data as that which is displayed in the **Billing Analysis Report**. The only caveat to take into consideration when comparing one to the other for the purpose of validating data is the dataset restriction described in the Overview section above. The steps below should be taken if you are attempting to validate Financial Analytics data to data displayed in the Billing Analysis Report.

1. Navigate to the Billing Analysis report by following the path above.
2. Set the report parameters:

   a. Enter your **date range**. If you are validating data from the beginning of the dataset, enter January 1, 2018 as your start date and the ending date that you used when viewing your Analytics (until after January 1, 2022).
   b. Select the **Posting (entry)** radio button and deselect the **Include voids** checkbox if it is selected.
   c. Click **Refresh Grid** to populate the report data.

3. Click the **Add columns** button 📇 , and select the checkboxes (if not already selected) for the following to add them to the grid.

   - Date Posted
   - Trans. #
   - Tx # Paid

4. Click the **Date Posted** column header to sort the transactions by earliest date, and scroll to the top of the list so that you are starting with the earliest date in your range.
5. In the report grid, scroll down to identify the first occurrence (based on **Date Posted**) of an **actual charge CPT** code. CPTs such as 1, 2, or 4 reference transactions made on charges outside of the dataset and do not count as actual CPTs.
6. Make note of the **Trans. #** for that line item. **This is the transaction number that begins your dataset** and will be used in step 8.
7. Hover over **Tx # Paid** column, select the filter icon, and click **Custom**.
8. Create your filter to be **equals 0 or greater than the Trans. #** you identified as the start to your dataset in step 6.

9. Click **OK**.

> ## This content is intended for use by OP RCM Clients only.

About

The dataset for OP Financial Dashboards includes three full calendar years in addition to the present year. Meaning, *prior* to January 1, 2021, the first date in the dataset is January 1, 2017 and after January 1, 2021, the first date in the dataset is January 1, 2018.
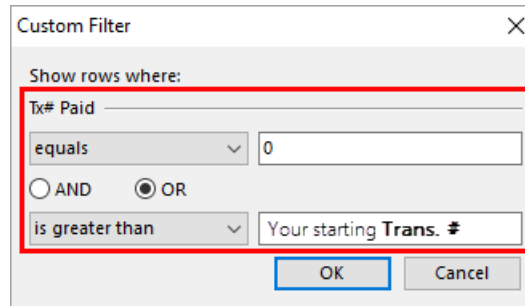
Compare Dashboard Data to OP Data

| **Path: Billing tab > Transactions drop-down > Transaction Analysis**

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1. Navigate to the Billing Analysis report by following the path above.
2. Set the report parameters:

   a. Enter your **date range**. If you are validating data from the beginning of the dataset, enter January 1, 2018 as your start date and the ending date that you used when viewing your Dashboards.
   b. Select the **Posting (entry)** radio button and deselect the **Include voids** checkbox if it is selected.
   c. Click **Refresh Grid** to populate the report data.

3. Click the **Add columns** button ⊞ , and select the checkboxes (if not already selected) for the following to add them to the grid.

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7. Hover over **Tx # Paid** column, select the filter icon, and click **Custom**.
8. Create your filter to be **equals 0 or greater than the Trans. #** you identified as the start to your dataset in step 6.

Custom Filter   ✕

Show rows where:

Tx# Paid

| equals | ⌄ | 0 |

○ AND   ⦿ OR

| is greater than | ⌄ | Your starting **Trans. #** |

OK   Cancel

9. Click **OK**.