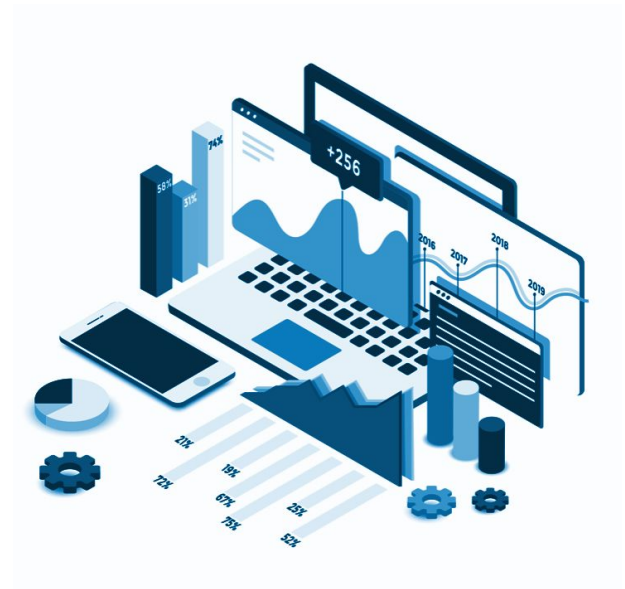# How to Turbocharge Your Practice with eCW Analytics

PM Analytics Dashboard and eBO Reporting

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Speakers

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About **Revele**

Simplifying the business of medicine.

Everyday users of **eClinicalWorks** for over a decade

National in scope with expertise on medical coding and billing regulations for **every state and specialty in the U.S.**

Monthly **insight reporting and consulting to guide** RCM customers to meet performance goals.

U.S. based eClinicalWorks support and Certified Trainers to assist with eCW questions, issues, and optimization.

REVELE

OUR SOLUTIONS

Built for end-to-end optimization

Revenue Cycle Management

End-to-end revenue cycle management services built for eClinicalWorks users to improve cash flow by collecting more, faster.

Reporting & Analytics

Custom eBO reporting and healthcare analytics and dashboard solutions to make measuring and managing RCM and clinical performance a breeze.

Training & Support

eClinicalWorks support, training, reporting and optimization services customized to fit each practice's unique needs.

REVELE

Housekeeping

- Questions? Use the Q and A box on your screen and we will get to as many as we can at the end of the webinar.

- The webinar is being recorded, we will send you the slides and recording once the webinar concludes.

eClinicalWorks eBO

eBO Overview & Customizations

1. Quick Links (bottom menu bar)

2. Search

3. Classic View vs. Portal View

4. Identify Report Package

5. Creating Folders

6. Run Reports in Background

Front End/Mid Office

eBO Report 11.01

Day Sheet Payments by User

- Filters:
  - Date Range
  - Summary and/or Detail
  - Facility Name
  - User Name
- View:
  - Payment Type (including custom types)
  - Patient/Insurance Details
  - Date
  - ID
  - Amount

REVELE

eBO Report 11.02

Copay Report

Disclaimer: Must have custom payment types with COPAY as a prefix

- Filters:
    - Date Range
    - Appointment Provider
    - Facility
    - OMIT visit statuses
- View:
    - Expected Copay
    - Copay Amount
    - Other Paid
    - Total Collected
    - Copay Variance
    - Copay Percent Collected

eBO Report 13.04

Available Slots

- Filters:
    - Date Range
    - Time Range
    - Facility
    - Provider
    - Visit Types/Visit Statuses
    - Days of Week
- View:
    - Available Appointment Date
    - Start Date/Time
    - End Date/Time
    - Count by Day, Visit Type, Provider, Facility

eBO Report 13.10

Progress Note Completion Date vs. Claim Creation Date

- Filters:
    - Service Date Range
    - Appointment Provider/Resource Provider
    - Facility
    - Visit Status
- View:
    - Brief Patient Details
    - Encounter ID
    - Billable vs. Non Billable
    - Chart Lock Status
    - Progress Note Locked Date
    - Claim Number
    - Claim Creation Date

eBO Report 4.04 & 4.05

Incoming Referral / Outgoing Referral

- Incoming
    - Referral Status
    - Referral From
    - Brief Patient Details
    - Referral/Authorization Number
    - Start/End Date
    - Insurance
    - Visits Allowed/Visits Used
- Outgoing
    - Referral From/Referral To
    - Specialty Name
    - Count

Revenue Cycle/Financial

eBO Report 31.01

Aging Summary Analysis

- Filters:
  - Claim Date/Service Date
  - Balance Types & Range
  - Facility Name/Group
  - Insurance Name/Group
  - Provider
  - Patient/Guarantor
  - 0-30 - 180+ Days
- View:
  - AR Ranges
  - Balance
  - Drill In/Export Detail
  - Groupings/Categories (Facility, Insurance, Provider, etc.)

eBO Report 36.14

Financial Analysis at Claim Level (with everything)

- Filters:
  - Claim Date/Service Date
  - Associated vs. Unassociated
  - Date Range
  - Facilities, Insurances, Patients, etc.
  - Transactions to Display (Billed Charge, Payments, Withholds, Refunds, Adjustments, Counts, etc.)

- View:
  - Transaction Types
  - Drill In/Export Detail
  - Groupings/Categories (Facility, Insurance, Provider, etc.)

eBO Report 37.08

Financial Analysis at CPT Level (with everything)

- Filters:
  - Claim Date/Service Date
  - Associated vs. Unassociated
  - Date Range
  - Facilities, Insurances, Patients, etc.
  - Transactions to Display (Billed Charge, Payments, Withholds, Refunds, Adjustments, Counts, etc.)

- View:
  - Transaction Types
  - Drill In/Export Detail
  - Groupings/Categories (Facility, Insurance, Provider, etc.)

eBO Report 37.09

Fee Schedule Allowable vs. Claim Payments

- Filters:
  - Claim Date/Service Date
  - Associated vs. Unassociated
  - Date Range
  - All Payments/Payments < Fee Schedule Allowed/Payments > Fee Schedule Allowed
  - Provider, Facility, Insurance, Procedure Code

- View:
  - Groupings/Categories (Facility, Insurance, Provider, CPT code etc.)
  - Dates
  - Claim ID
  - Charge Allowed Fee/Payment Allowed Fee/Payment Percentage

eBO Report 38.01

RVU Report (Work and Total)

Disclaimer: Make sure to run the Populate Dummy CPT code RVU Utility via the Report Console

- Filters:
    - Summary/Detail
    - Claim Type: HCFA, UB, Dental
    - Date Range and Type (Claim vs. Service)
    - RVU Year
    - Insurance, Facility, Provider, CPT, etc.

- View:
    - Groupings/Categories (Facility, Insurance, Provider, CPT code etc.)
    - RVU's
    - Billed Charges
    - Billed Units

Exception Reports

eBO Report 122.06

Unposted Transactions at CPT Level

- Filters:
    - Date Range
    - Claim Date vs. Service Date
    - Associated vs. Unassociated
- View:
    - Unposted Payments at CPT
    - Unposted Refunds at CPT
    - Unposted Write Offs at CPT

Importance: If you run and view CPT level reports with a goal to see all associated transactions to those codes, it's important to ensure all transactions are posted to the CPT level that can be. The charges will always be at the CPT level but you have to make sure payments, refunds, and write-off's are carried to the CPT level as well.

eBO Report 44.03

Facilities Not in a Group

- Export:
  - Facility Group (blank)
  - Facility Name
  - Deleted Facility (Yes/No)

Importance: If you run and view reports at a facility group level with a goal to see all associated transactions to facilities in those groups, it's important to make sure all facilities you use are in a group to ensure all transactions are reflected on reports.

eBO Report 44.04

Insurances Not in a Group

- Export:
    - Insurance ID (system generated number)
    - Insurance Name
    - Insurance Demographics (Address, State, Zip)
    - Payor ID

Importance: If you run and view reports at an insurance group level with a goal to see all associated transactions to insurances in those groups, it's important to make sure all insurances you use are in a group to ensure all transactions are reflected on reports.

eBO Report 44.05

Insurances in More than One Group

- Export:
  - Insurance Name
  - Insurance Group Name

Importance: If you run and view reports at an insurance group level with a goal to see all associated transactions to insurances in those groups, it's important to make sure insurances are only in one group or else they will be counted numerous times based on how many groups the insurance is in.

Q & A

How can we help *your practice*?