



## Financial Oversight Reporting Exercises

Here are some of the things you'll do during this practice session:

- Connect to the EHR Report Library on your own server
- Connect to Practice Management Smart Report Suite (srs) on your own server
- Experience how to customize reports to meet your needs

*Connect to your PCC server and EHR application for exercises 1-2. Please see a PCC staff member if you need assistance with connecting to your server. You will need to connect to Practice Management and use srs (Smart Report Suite) for exercises 3-4.*

**Exercise 1: Determine if there are any old encounters still waiting to be billed. Are there some providers with lots of unbilled encounters?**

- Use the "Encounters by Billing Status" report in the Report Library.

**Exercise 2: Use the EHR "Total Charges and Payments by Provider and Month" report to report monthly charges, payments, and refunds by provider.**

- Create a custom version of this report that includes a subtotal by provider and procedure group.
- If your practice has multiple locations, add an additional column to subtotal by location.

*Connect to to Practice Management and use srs (Smart Report Suite) for exercises 3-4.*

**Exercise 3: Report sick, well, immunization, and other visit totals by provider.**

- Use the “Per-Visit Analysis by Provider (Grouped by Visit Type)” report in srs Visit Reports category.
- Be sure to add the following restrictions when running the report:
  - “Include only Revenue Charges”

**Exercise 4: Run a payment analysis by CPT code report to monitor average charge and payment amounts by payor.**

- Use the “Reimbursement Analysis w/RVU (by CPT Code)” report in srs RVU Reports category.
- When prompted, select several of your most common procedure groups
- Add restriction criteria of “CHARGE Amount Due for Visit” and specify \$0 to \$0. This ensures you are only looking at paid charges.

Are any insurance companies paying you at or near your charge amount for certain procedures? Is it time to raise some prices?