Dashboard Gadget User Guide

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A/R Aging

Best used to: Quickly find your aging charges and understand who is responsible for it.

Designed for: Collections

Filters: By Date of Service, By Entered Date, All Charges, By Charge Amount, by Net Amount, Exclude Charges at Collection, Show Amount Over 90 Days, Show Amount Over 120 Days.

Drill Down: Not Applicable.

Details: As your outstanding charges increase in age, the ability to locate and collect on balances becomes critically important. Similar to the A/R Aging Summary report, the A/R Aging gadget will summarize who is responsible for outstanding charges at various age ranges and provide the total amount that is outstanding at any given time.

Any charges entered or updated will not be reflected in the A/R calculation until the next day.

Drill Through: This report includes a direct connection to the Charge Aging Report.

Limitations:

- Does not include charges set to the status of Deleted or Incomplete.
- Does not include charges set to the status of Paid.

Average Touches to Completion Gadget

Best used to: Understand the efficiency of your practice's revenue cycle

Designed for: Administrators

Filters: Last 6 Months, Last 12 Months, All Time

Drill Down: Includes ability to drill down by a specific month when viewing results.

Details: Claim rework and denials can be a major source of inefficiency – and cost – in your practice's revenue cycle. The Average Touches to Completion is a powerful view into your practice's efficiency by showing you, on average, how many times a claim has been worked before it was paid. Aim to have each claim worked two or fewer times between charge capture and the claim being paid for maximum efficiency

Drill Through: This report includes a direct connection to the **Touches to Completion** report.

Charges & Debits Gadget

Best used to: Track daily and weekly trends in the amount of charges and debits entered into CollaborateMD.

Designed for: Administrators

Filters: Date of Service or Entered Date; Last 7 Days, Last 30 Days, Last 90 Days; Charges and Debits, Only Charges, Only Debits

Drill Down: Includes ability to drill down by a specific date when viewing results within the Last 90 Days.

Details: One of the key indicators for determining your office's billing volume is the amount of charges and debits being created over time. The Charges & Debits gadget, much like a summarized version of the Daily/Monthly report, will provide an overview of charges and debits flowing through CollaborateMD on a daily and weekly basis, allowing your office to ensure a consistent and increasing volume.

Drill Through: This report includes a direct connection to the Daily/Monthly Charges and Debits report.

Limitations: None.

Charges Not Billed Gadget

Best used to: Track outstanding charges that are waiting to be billed to insurance.

Designed for: Billers

Filters: N/A

Drill Down: Includes ability to drill down unbilled charges per customer, if multiple exist.

Details: Ensuring maximum collection potential means constantly being on top of charges still waiting to b billed to insurance. The Charges Not Billed gadget identifies all idle charges that have yet to be billed or (re billed) to insurance, allowing your business' revenue cycle to remain healthy.

Drill Through: This report includes a direct connection to Claim Control.

Limitations:

- Does not include charges set to the statuses of Deleted or User Print and Mail to Insurance.
- Does not include any post-billing status, such as Charge at Insurance, Rejected at Clearinghouse.
- Debits are included in any balances appearing in the following statuses: On Hold, Incomplete, Pending Patient, Pending Physician, and Waiting for Review. When drilling through to Claim Control from this gadget, only charges will appear, debits are not included in the results list.
- When drilling through to Claim Control from this gadget, keep in mind that Claim Control displays the totals charge amounts, while the gadget displays the charge balances.
- Charge balances must be greater than zero ($0.00).

Claim Denials Gadget

Best used to: Stay on top of recent denials from your payers and track your denial rate.

Designed for: Billers

Filters: Last 30 Days, Last 90 Days, Last 6 Months, Last 12 Months; By Code, By Payer.

Drill Down: Includes ability to drill down rejections on a specific date and per customer, if multiple exist.

Details: The Claim Denials gadget shows you the denials that are having the biggest impacts on your performance and, therefore, are the first to target to improve your cash flow and revenue cycle management. This gadget also calculates your denial rate, the percentage of your billed claim amounts tha are being denied. On average, denial rates between 5% and 10% are typical, with rates below 5% indicatin

exceptional revenue cycle management.

Drill Through: This report includes a direct connection to the Denials report for the date range shown in the gadget and the denial code/payer that was selected (depending on which view option is used).

Note: This Gadget is meant to display a historical metric of the denials you've received over time; it is NOT a "working report" managing denials that require action.

Claim Rejections Gadget

Best used to: Stay on top of recent claim rejections from the Clearinghouse or Payer and track your acceptance rate.

Designed for: Billers

Filters: Yesterday, Last 7 Days, Last 30 Days; Show All Rejections, Only show "Rejected – Not Fixed"; Clearinghouse Rejections, Payer Rejections, Clearinghouse & Payer Rejections.

Drill Down: Includes ability to drill down rejections on a specific date and per customer, if multiple exist.

Details: CollaborateMD takes pride in its industry-leading first-pass acceptance rate, but some claims may slip through the cracks on that first submission to the Clearinghouse. Track your claim acceptance rate, and take advantage of Claim Review, Claim Scrubbing, and Real-Time Claim Submission to get as close to 100% as possible. The Claim Rejections gadget provides a direct window into your most frequent recent rejections and allows billers to hone in on the rejections still waiting to be fixed. Using this gadget in conjunction with Claim Tracking will ensure no rejection ever gets overlooked.

Drill Through: This report includes a direct connection to Claim Tracking.

Claims Billed Gadget

Best used to: Track trends and consistency in the amount and number of claims billed over a period of time

Designed for: Administrators

Filters: Last 7 Days, Last 30 Days, Last 90 Days, Last 12 Months

Drill Down: Includes ability to drill down by a specific date when viewing results for the Last 90 Days or Last 12 Months.

Details: How does your current billing volume compare to where your business was a year ago? A month ago? The Claims Billed gadget monitors claim volume and billing consistency on a daily, weekly, and monthly basis, allowing administrators to understand and deal with potential enterprise-level volume problems further downstream in the billing cycle.

Drill Through: This report includes direct connections to the Claims Billed Report and Claim Tracking.

Limitations:

- Does not include claims billed within a processing mode of TEST.

Claims Entered Gadget

Best used to: Understand how much was billed and paid on average over the last 12 months.

Designed for: Administrators

Static Filters: Displays results for claims entered within the last 12 months.

Drill Down: Includes ability to drill down claims entered within a specific month.

Details: How does today's average claim compare to a year ago? Is your claim amount to payment ratio increasing? These business critical questions can be explored through the Claims Entered gadget, which shows average claim/payment ratios compared with claim volume over the last 12 months.

Drill Through: This report has a direct connection to the Claims Entered Report.

Limitations:

- Does not include Deleted or Incomplete claims.

Clean Claim Rate Gadget

Best used to: Track trends in your front-end billing performance.

Designed for: Billers

Filters: Last 30 Days, Last 90 Days, Last 6 Months, Last 12 Months.

Drill Down: Includes the ability to drill down by each day within the period (month or week).

Details: The Clean Claim Rate calculates the percentage of claims that pass all front-end edits. A high clean claim rate means that you're avoiding issues that prevent payment and require issuing corrected claims. If the rate is low, check your top claim rejections and make sure you're taking advantage of our Claim Scrubbing feature to catch common issues before billing!

Drill Through: This report includes a direct connection to the**Electronic Claim Activity** report.

Collections Aging Gadget

Best used to: Quickly find your aging collections and understand who is responsible for it.

Designed for: Collections

Filters: None.

Drill Down: Not Applicable.

Details: As your outstanding charges increase in age, the ability to locate and collect on balances becomes critically important. Similar to the A/R Aging Summary report, the Collections Aging gadget will summarize who is responsible for outstanding charges at various collection agencies and provide the total amount that is outstanding at any given time .

Drill Through: This report includes a direct connection to the Charges at Collection report .

Limitations:

- Does not include charges set to the status of Deleted or Incomplete.
- Does not include charges set to the status of Paid.

Days in A/R Gadget

Best used to: Understand how your practice's revenue cycle is performing

Designed for: Administrators

Filters: Last Month, Last 90 Days, Last 6 Months, Last 12 Months; All Open Charges, Exclude Charges at Collection

Drill Down: Includes the ability to drill down by a specific Payer, Payer Type, Facility, Practice, Office, Provider, or Provider Specialty when viewing results within the Last 90 Days, 6 Months, or 12 Months.

Details: Days in A/R shows the average number of days that it takes your practice to receive reimbursement, a crucial measure of your revenue cycle performance. Between 35 and 50 represents a healthy practice. Higher than 50 indicates that there are opportunities for improvement.

Drill Through: N/A

Limitations:

- Only shows payments that have been posted/saved. If ERAs are unapplied, these payments are not included in this gadget.
- Does not include refund or reversal payments.
- Only updates once per day.

First Pass Resolution Rate Gadget

Best used to: Track trends in your insurance billing performance.

Designed for: Billers

Filters: Last 30 Days, Last 90 Days, Last 6 Months, Last 12 Months.

Drill Down: Includes the ability to drill down by each day within the period (month or week).

Details: The First Pass Resolution Rate calculates what percentage of claims are paid on the initial submission. This metric captures your overall efficiency through all clearinghouse and payer edits/rules. Aim for an FPRR of over 90% to maximize the efficiency of your revenue cycle!

Limitations:

- Does not include resubmitted claims.

Gross Collection Rate Gadget

Best used to: Understand what percentage of your charges are collected.

Designed for: Administrators

Filters: Last 6 Months, Last 12 Months, All Time; Rolling 12-Month Average Collection Rate, Fixed Gross Collection Rate

Drill Down: Includes ability to drill down by a specific month when viewing results.

Details: Your gross collections rate indicates how well your fees are matched to your allowed amounts. A very low gross collection rate may indicate that your fee schedule amounts are too high. A very high gross collection rate may indicate that your fee schedule amounts are too low, potentially leading to reduced reimbursements.

Drill Through: This report includes a direct connection to the**Daily/Monthly Transactions** report.

Limitations:

- Any charges or payments entered or updated will not be reflected in the gross collection rate calculation until the next day.

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nsurance Payments & Adjustments Gadget

Best used to: Understand how insurance payments and adjustments compare to one another on a daily an weekly basis.

Designed for: Administrators

Filters: Received or Entered Date; Last 7 Days, Last 30 Days, Last 90 Days

Drill Down: Includes ability to drill down by a specific date when viewing results within the Last 90 Days.

Details: Understanding the trends and ratio between your insurance payments and adjustments is crucial when gauging how effectively your office is billing. The Insurance Payments & Adjustments gadget provide an overview of how much is being paid versus adjusted including any refunds/reversals on a daily and weekly basis, allowing for easy assessment of your current billing goals and strategic insight behind the planning of new goals.

Drill Through: This report includes a direct connection to the Daily/Monthly Insurance Payments/Adjustments report.

Limitations:

- Results only include payments that have been posted/saved. Unapplied ERAs are not included in this report.

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nterface Errors Gadget

Best used to: Monitor and resolve interface errors as they happen in real-time.

Designed for: Front Office

Filters: Yesterday, Last 7 Days

Drill Down: Includes ability to drill down interface errors by a specific date, and customers, if multiple exis

Details: An optimized workflow between your favorite EHR and CollaborateMD relies on fast and efficien resolution of errors that may occur. A backlog of unfixed interface errors can have a serious impact on the life cycle of claims, which is why the Interface Errors gadget keeps you informed in real-time of errors that

have come across.

Drill Through: This report includes a direct connection to Interface Tracking.

Limitations:

- Only applicable for accounts that have an active interface which sends messages to CollaborateMD.

Lag Time Gadget

Best used to: Understand the efficiency of each stage of your practice's revenue cycle.

Designed for: Administrators

Filters: Last 30 Days, Last 90 Days, Last 6 Months, Last 12 Months.

Details: Lag Time shows how long, on average, a charge will spend in each part of the revenue cycle: charge lag, insurance charge capture lag, and patient charge capture lag. Understanding charge lag is the key to understanding where to invest in efficiency within your practice. Aim for billing lag – the number of days between the date of service and billing insurance of 1-2 days.

Drill Through: This report includes a direct connection to the**Lag Time** report.

Net Collection Rate Gadget

Best used to: Understand the health of your revenue cycle.

Designed for: Administrators

Filters: Last 6 Months, Last 12 Months, All Time; Rolling 12-Month Average Collection Rate, Fixed Net Collection Rate

Drill Down: Includes ability to drill down by a specific month when viewing results.

Details: Your net collections rate indicates what percentage of your net charges – your charges less

contractual adjustments – your practice is collecting. A net collection rate of 97% or more indicates a top-performing practice. If your net collection rate is between 93-96%, your net collection rate is good. Lower than 93%, you can run an Adjustments report to find non-contractual adjustments that are being taken against your net charges, run a Denials report to see which claims aren't being paid, and use Electronic Statements and Prompt Payment Discounts to reduce Patient A/R.

Drill Through: This report includes a direct connection to the**Daily/Monthly Net Charges** report.

Limitations:

- Any charges or payments entered or updated will not be reflected in the net collection rate calculation until the next day.

Patient Payments & Adjustments Gadget

Best used to: Understand how patient payments and adjustments compare to one another on a daily and weekly basis.

Designed for: Administrators

Filters: Received or Entered Date; Last 7 Days, Last 30 Days, Last 90 Days

Drill Down: Includes ability to drill down by a specific date when viewing results within the Last 90 Days.

Details: Collecting patient balances is an art form in its own right, especially when it comes to ensuring tha your office is collecting more than is being written off or adjusted in other ways. By using the Patient Payments & Adjustments gadget, your office can easily see what has been collected from patients on a dail and weekly basis compared with how much has been adjusted or written off. Used with the Daily/Monthly report of the same name, this gadget can be your main tool for managing trends in your patient collection consistency.

Drill Through: This report includes a direct connection to the Daily/Monthly Patient Payments/Adjustments report.

Limitations:

- Results only include payments that have been posted/saved.

Patient Statements Gadget

Best used to: Track trends and consistency in the amount and number of patient statements sent over a period of time.

Designed for: Administrators

Filters: Last 7 Days, Last 90 Days, Last 12 Months

Drill Down: Includes ability to drill down by a specific date when reviewing result within the Last 90 Days and the Last 12 Months.

Details: When it comes to collecting on patient balances, steady and persistent statement billing is key. Th Patient Statements gadget allows easy tracking of statements billed on a daily, weekly, and monthly basis, resulting in quick analysis of statement trends and effective planning for where your statement volume wi be in the near future.

Drill Through: This report includes a direct link to the Statements Printed in a Date Range report.

Limitations:

- This report includes Automated, Plain Text User Print, and Enhanced User Print statements.
- Results will not necessary match information displayed in Statement Tracking, as Plain Text User Print statements are not reflected in Statement Tracking results.

Patients Added Gadget

Best used to: Track daily and weekly trends in the number of patients entered into CollaborateMD.

Designed for: Administrators

Filters: Last 7 Days, Last 30 Days, Last 90 Days

Drill Down: Includes ability to drill down the number of patients added within a week when viewing results within the Last 90 Days.

Details: New patients are essential to the growth and prosperity of a practice. Is your frequency of new patient visits trending upward or downward? The Patients Added gadget will help to track these trends and provide daily and weekly summaries of patients added into CollaborateMD.

Drill Through: This report includes a direct connection to the Patient Listing report.

Limitations:

- Does not include patients marked as inactive.

Payer Mix Gadget

Best used to: Understand what types of payers are having the largest impact on your business.

Designed for: Administrators

Filters: Last 7 Days, Last 30 Days, Last 90 Days

Drill Down: N/A

Details: Depending on its specialty, your practice may depend on certain payers more than others and, often times, variations in payer types means variations in expectations. These expectations can be strategically managed by utilizing the Payer Mix gadget, which shows the top payer types that claims have been created for recently, allowing your office to properly position expectations for when those claims are adjudicated.

Drill Through: This report includes a direct connection to the Daily/Monthly Charges and Debits report.

Limitations:

- Only considers the primary payer on charges.

Payments Received Gadget

Best used to: Track daily and weekly trends in the amount of payments received from patients and insurance.

Designed for: Administrators

Filters: Received or Entered Date; Last 7 Days, Last 30 Days, Last 90 Days; All payments, Only insurance payments, Only patient payments

Drill Down: Includes ability to drill down by a specific date when viewing payments received in the Last 90 Days.

Details: The Payments Received gadget provides the ultimate overview of payments received from both patients and insurance. This gadget provides full visibility into your business' gross revenue on a daily and weekly basis, allowing for analysis of trends and projection of future revenue.

Drill Through: This report includes direct connections to the Daily Deposit Report, Daily/Monthly Insurance Payments/Adjustments report, and the Daily/Monthly Patient Payments/Adjustments report and the Payment Tracking area of the Control section.

Limitations:

- Only shows payments that have been posted/saved. If ERAs are unapplied, these payments are not included in this gadget or the corresponding reports.
- Does not include refund or reversal payments.

Payment Plan Balance Gadget

Best used to: Monitor overdue and upcoming balances due on patient payment plans.

Designed for: Collections

Filters: By Age, By Week, By Month

Drill Down: N/A

Details: Is your office staying vigilant when it comes to collecting balances on patient payment plans? Maximize your planned patient payments by utilizing the Payment Plan Balances gadget, which provides a overview of overdue and upcoming payment plan balances that should be collected.

Drill Through: This report includes a direct connection to the Payment Plan Balances report.

Limitations:

- Only considers active payment plan balances.

Procedure Frequency Gadget

Best used to: Understand which procedures are bringing the largest return on investment.

Designed for: Administrators

Filters: Last 30 Days, Last 90 Days, Last 12 Months; By Charge Amount, Charge Count, or % Paid, By Unit Count

Drill Down: N/A

Details: Determining an office's return on investment for procedures performed is crucial to the success and stability of a practice. Which procedures are getting paid the most? Which are being performed more frequently? The Procedure Frequency gadget provides insight into your office's most frequent procedures and how much is actually being paid on them.

Drill Through: This report includes a direct connection to the Procedures Done in a Date Range report.

Limitations:

- When viewing results for Charge Amount and Charge Count deleted charges are not included.
- When viewing results for the Percentage Paid, only posted/saved payments are included in the results. Unapplied ERAs are not included in this report.

Refunds & Reversals Gadget

Best used to: Track how refunds and reversals are impacting your net revenue on a daily and weekly basis.

Designed for: Administrators

Filters: Received or Entered Date; Last 7 Days, Last 30 Days, Last 90 Days; View Options: Refunds & Reversals, Only Refunds, Only Reversals

Drill Down: Includes ability to drill down to amount within a specific date when viewing results for the Last 90 Days.

Details: If not closely monitored and accounted for, refunds and reversals can have a serious impact on your business' net revenue, especially if gone unnoticed. The Refunds & Reversals gadget helps to keep you fully aware of all recent negative impacts to your revenue, preventing any surprises while closing your books.

Drill Through: This report includes a direct connection to the Refund/Reversal report.

Limitations:

- Only includes refunds and reversals that have been posted/saved. Unapplied ERAs that include refunds/reversals are not reflected in this report.

Scheduled Appointments Gadget

Best used to: See a weekly overview of upcoming appointments, broken down by status.

Designed for: Front Office

Filters: This & Next Week, Next 30 Days, This Month

Drill Down: Regardless of the filter selection, users can always drill down into a specific week to see the

day by day breakdown of the scheduled appointments.

Details: Is your office scheduling more follow-ups than initial encounters? Have you hit your maximum capacity of appointments over the next couple of weeks? These questions are answered by utilizing the Scheduled Appointments gadget, which shows you a breakdown of appointments over the next few weeks by status, allowing your office to plan its schedule effectively and strategically.

Drill Through: This report includes a direct connection to the Scheduler section.

Limitations:

- Does not include inactive appointment statuses.
- Does not include the appointment status of Deleted.
- This report does not include the option to hover over the date to see specifically how many appointments have been scheduled or confirmed.

To-Do List Gadget

Best used to: Stay on top of action items such as outstanding claims, unapplied ERAs and statements that are relevant to your role in CollaborateMD.

Designed for: Billers & Payment Posters

Filters: N/A

Drill Down: N/A

Details: Managing your account by jumping from section to section can be time-consuming and distracting. The To-Do List gadget will help keep even the busiest billers and payment posters on track by providing a real-time, summarized list of action items, catered to your role in CollaborateMD.

Drill Through: Click on the title to be brought to the screen/section to complete the action.

Limitations:

- The below items only display data for the last thirty (30) days:
    - Unapplied ERAs
    - Unresolved claim rejections
    - Unresolved interface errors
    - Unresolved statement errors
    - Claim follow-ups
- All drill-through capabilities require permission(s) to the corresponding section(s) of the application.

Top Clients Gadget

Best used to: Understand which clients are contributing the most to the success of your billing service.

Designed for: Business Owners

Filters: Last 30 Days, Last 90 Days, Last 12 Months

Drill Down: N/A

Details: As a business owner, it is important to recognize and nurture clients that are contributing most to the growth and stability of your business. The Top Clients gadget provides a ranked overview of revenue received per customer account, allowing for a quick glance into where the majority of your business' profit potential lies.

Drill Through: N/A

Limitations:

- This gadget can only be viewed by Admins and Authorized Reps. Users are unable to view this gadget, even when included on a dashboard to which they have access.
- Admins will only see information for customers to which they have access.
- Clients are ranked based on insurance payments that have been received and posted/saved. Unapplied ERAs are not included in this report.