

# Reporting Overview

Access OrthoFi reporting by clicking the Reports button at the top of your homepage. You can limit access to certain reports by clicking the Team Management button. Navigate between the tabs on the Reports page to change reports.

## BUSINESS HEALTH DASHBOARD

DASHBOARD

ACCOUNTING

PRACTICE PERFORMANCE

COLLECTIONS

ADMIN

BUSINESS HEALTH DASHBOARD

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Date: May 2021 Practice: Practice City: (All)

- Real-time executive level summary of key performance indicators for the month
- Recommended for Doctor, Financial Coordinator, Practice Manager
- Check Daily/Weekly/Monthly

### The report is broken down into 4 sections:

#### AmpliFi

Growth of the practice by month

- Measures: Starts, Production, Kept New Patient Exams

#### ClariFi

How effective and efficient is the growth by month

- Measures: Same Day Starts, Same Day Cash, Treatment Recommended Conversions (TRC), Kept New Patient Exams

#### SimpliFi

Insurance services managed by OrthoFi

- Measures: Eligibility Checks, Claims Management, Insurance Receivables

#### SolidiFi

Patient collections services managed by OrthoFi

- Measures: Patient Receivables, Net Collections Rate

## ACCOUNTING REPORTS

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Month ▾

May ▾

2021 ▾

All Practices ▾

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Practice Location

[Run Report](#)

### Monthly Balance Sheet

- Check Monthly
- Recommended for Bookkeeper/CPA
- Serves as the primary end-of-month reporting resource for bookkeepers & accountants. Breaks down totals for production, collections, and deposits for the month.

### Patient A/R

- Check Monthly
- Breakdown of patient receivables by credit tier, aging of past due balances, and production by each tier.

### Insurance A/R

- Check Monthly
- Reporting to provide clear visibility to claim status and Insurance A/R
- Insurance A/R Aging - provides visibility into the aging of Insurance A/R for claims that we expect payment

### Claims Status

- Check Monthly
- Provides both a summary and detailed views of the status for all of a practice's claims

### Production Adjustments

- Check Weekly/Monthly

### Discounts

- Check Weekly/Monthly
- Itemizes discounts that have been applied to each patient account.
- Provides the discount name, amount, patient, and method of application.

### Misc Charges

- Check Monthly
- Shows all of the miscellaneous, or one-time charges. These charges most commonly include things like retainers, toothbrushes, or various other expenses not included in treatment.

### Patient Account Summary

- Check as Needed
- Specific patient's financial and treatment info. Includes contracts in suspended status and past due accounts.

### Interest Accrual

- Check Monthly
- Monthly representation of interest accrued by patient. Shows the amount of days the interest has accrued, and the percentage of the interest.

## PRACTICE PERFORMANCE REPORTS

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Practice Location

Select a Practice

Select a Practice

+ Advanced Filters

Run Report

### Starts Report

- Check Daily/Weekly/Monthly
- Represents a signed contract by the patient. Includes: treatment fee, discounts, production, insurance coverage, patient responsibility, down payment, monthly payment, payment length, interest rate, and finance charge.

### Kept NPE

- Check Daily/Weekly/Monthly
- Breakdown of scheduled exams by exam type. Output is the number/percentage of exams that were kept.

### Outcomes

- Check On Demand
- Details the outcome assigned to all scheduled exams. Possible outcomes include: Treatment Recommended, Observation, No Treatment, Specialist, or Cancellation.

### Conversions

- Check Daily/Weekly/Monthly
- Conversion rate for the practice by exam type. OrthoFi measures conversion using TRC, or treatment recommended conversion. Considers only those patients ready for treatment that signed a contract.

### Conversions by Month

- Check Monthly
- Month over month analysis of Conversion Rate (exams/starts) and TRC (Tx Recommended Conversion) by Exam Type

### Referral Sources

- Check Monthly
- Documents revenue generated by referral type. Useful when evaluating effectiveness of marketing campaigns

## COLLECTIONS REPORTS

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05/17/2021

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Payment Location

Select a Practice

Select a Practice

Run Report

### Collections Summary

- Check As Needed
  - Summary of dollars collected during a defined period of time by the following:
  - Patient - Down Payment/Monthly Payment
  - Insurance - Benefits
  - Collections Outside OrthoFi - Receivables collected in PMSW
  - Schedule Autopay - Future autopay collections expected

### Collections Details

- Check Daily/Weekly/Monthly
- A more detailed report of collections by collection type.
- Report highlights whether the payment is completed or failed.
- Included transaction fees (credit card processing), whether collected by office or practice, and any interest collected for the payment.

### Collections and Charges

- Check Daily/Weekly/Monthly
- Collections and Fee reporting.
- Includes all revenue collected, less all incurred fees, resulting in an estimated deposit amount

### Day Sheet

- Check Daily
- This report is used to show all payments that were collected in the office
  - Cash, checks, cashier's checks, PMSW transactions, and other collections
- This includes insurance checks received in the office and uploaded to OrthoFi
- It does not include credit/debit/checking/savings payments

## ADMIN REPORTS

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Run Report

### Delinquent

- Check Daily/Weekly
- Reporting for all past due accounts. Important to track these accounts in OrthoFi, but also your management system by creating an alert. Details which accounts have a payment and email on file for collection efforts.

### Insurance Reconciliation

- Check Weekly/Monthly
- Repository for all insurance collections, whether received by the practice or OrthoFi. Report is separated into two categories:
- Non-OrthoFi Patients - Insurance collections for patients started in practice management software
- OrthoFi Patients - Insurance collections for patients started in OrthoFi

### Goals

- Check Monthly
- Goal setting capability for year over year growth analysis. Focuses on Kept NPE, Starts, and Production. Ability to enter numbers for these three categories retroactively to measure growth of the practice.