Dummy Healthcare Power BI Report - Technical Walkthrough

# 1. Executive Dashboard

Purpose: High-level summary for leadership.

Key Metrics:
- Total Charges ($1.95M vs $1.7M budget, +14.5%)
- Total Payments, Units, RVUs, Office Visits, Surgery Volume, New Patients

Visuals:
- Monthly encounter trends vs budget and prior year
- Selected Metric vs Budget (line + bar charts)
- Daily averages (e.g., $11.5K per working day)

Use Case: Quick pulse on financial and clinical performance against goals.

# 2. Metrics by Month

Purpose: Drill into monthly trends by provider team.

Key Insights:
- Table showing encounters by team (APP, Surgical, Rehab, etc.)
- Visual: monthly encounters compared to last year and budget
- Slicers: Provider → Location and vice versa

Use Case: Identify which specialties drive volume, where declines are happening, and how teams contribute to growth.

# 3. AI Analysis

Purpose: Advanced insights using AI visuals (Key Influencers, Decomposition Tree).

Metrics Analyzed: Encounters, Charges, Adjustments, Payments, Units, RVUs, ASC/MRI/DME activity, Net Revenue, Collection %.

Visuals:
- Decomposition Tree breaking down provider performance
- Key Influencers showing drivers of variation

Use Case: Exploratory analysis; find root causes of trends and what factors most impact outcomes.

# 4. Provider Metrics (Detailed)

Purpose: Comparison of individual providers YoY.

Metrics: Encounters, Charges, Payments, Units, RVUs

Structure: Split by provider teams (APP, Surgical, Rehab, etc.) with individual doctors.

Use Case: Spot top performers, track YoY growth/decline, benchmark across specialties.

# 5. Clinic Performance

Purpose: Operational clinic view.

Focus:
- Visits by provider and location
- Office Visits vs LY vs Budget
- Professional Fees (charges) YoY & YTD

KPIs:
- YTD Clinical Visits: 1,393 (+11% vs budget)
- YTD Professional Fees: $187K (+17% vs budget)

Use Case: Location-level decision making, resourcing clinics, spotting under/over-performance.

# 6. Clinical Analysis

Purpose: Patient acuity/severity monitoring.

Visuals:
- Encounters by clinical severity (Routine, Urgent, Emergency, Critical)
- Average encounter duration by severity
- Severity trends over time
- KPI Scorecard overlay

Use Case: Track acuity shifts (e.g., more urgent cases), operational planning for staff, quality-of-care monitoring.

# 7. Appointments & Episodes

Purpose: Patient-level scheduling & clinic throughput.

Focus:
- Established vs New patient appointments
- Clinic episodes: AM/PM sessions, surgeries, surgeries per clinic
- Charges by clinic minute
- Specialty & provider team appointment patterns

Use Case: Understand patient mix, optimize scheduling, monitor clinic efficiency.

# 8. ASC Performance (Ambulatory Surgery Center)

Purpose: Surgery-focused performance tracking.

KPIs:
- YTD ASC Encounters: 618 (down vs 933 LY)
- YTD Charges: $510K
- MTD Charges: $15K

Visuals: Cases by provider/location, YoY encounter/charge trends

Use Case: Evaluate surgical center utilization, highlight referral or throughput issues.

# 9. PT Performance (Physical Therapy)

Purpose: Rehabilitation/PT outcomes.

KPIs:
- YTD PT Visits: 1,404 (vs 1,939 LY)
- YTD PT Charges: $1.12M

Breakdowns: By referring provider, by location, by CPT code

Use Case: Measure therapy demand, track referral effectiveness, optimize staffing and billing.

# 10. MRI Performance

Purpose: Imaging center performance.

KPIs:
- YTD Encounters: 49 (down 29.6% YoY)
- YTD Charges: $34.7K

Visuals: Encounters by referrer type (internal vs external), by location

Use Case: Track imaging utilization and identify declining referrals or capacity gaps.

# 11. DME Performance (Durable Medical Equipment)

Purpose: Supplies & medical equipment revenue.

KPIs:
- YTD Encounters: 29
- YTD Charges: $26.5K

Visuals: Units by CPT, Encounters/Charges YoY, Avg Units/Encounter

Use Case: Monitor DME revenue contribution, CPT utilization, billing accuracy.

# 12. Specialty Scorecard (Provider-Level)

Purpose: Track individual provider performance within a specialty.

Metrics: Avg Charges, Collections, Surgical Cases, Encounters, New Patients

Comparisons: Current month vs prior year, YTD vs prior year, vs best-in-class benchmarks

Use Case: Fair performance evaluation, identify training/mentorship needs, reward high performers.

# 13. Specialty Scorecard (Subspecialty-Level)

Purpose: Focused specialty analysis (example: Foot & Ankle).

Metrics: Same as provider view but at specialty aggregate

Comparisons: Prior 12-month rolling charges, collections, encounters, new patients, surgical cases

Use Case: Track how subspecialties contribute to total performance and benchmark them against peers.

# 14. Data Dictionary

Purpose: Documentation for data transparency.

Contents:
- Column descriptions (e.g., AdjustmentAmt, AppointmentType, BillableIndicator)
- Measure definitions
- Relationships across tables

Use Case: Essential for developers, analysts, and auditors; ensures definitions are consistent across the org.

# 15. Data Quality Report

Purpose: Trust and governance of data.

Score: Overall data quality = 0.90

Checks:
- Freshness (days since last update)
- Completeness (patients, encounters, charges)
- Consistency (refunds > charges, duplicates, orphan records, mismatches)

Use Case: Gives confidence in data-driven decisions, identifies ETL or source system issues.