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.