

BUILDING BETTER DASHBOARDS

MICROSOFT POWER BI



INTRODUCTION



**TONY
DESANTIS**

TDESANTIS@LUTZ.US

THE AGENDA

INTRO

**REPORTING VS.
ANALYTICS**

**DATA
VISUALIZATION**

DASHBOARDS

KPIS

EXAMPLES

REPORTING VS ANALYTICS

WHAT YOU MIGHT BE HEARING

**HAVE YOU SAID
TO YOURSELF OR
HEARD CLIENT'S
SAY ANY OF THE
FOLLOWING?**

**THE
PROCESS
IS VERY
MANUAL**

**I CANNOT
GET THE
DATA I
NEED/WANT**

**IT TAKES
FOREVER TO
GET THE
REPORTS I
NEED**

**THERE ARE
SO MANY
DIFFERENT
SYSTEMS**

**WE HAVE A TON
OF
SPREADSHEETS**

**OUR DATA
IS A MESS**

**HOW DO WE GET
INSIGHTS OR
MAKE BETTER
BUSINESS
DECISIONS**

**THERE HAS
TO BE AN
EASIER WAY**

DEFINITION



DATA ANALYTICS

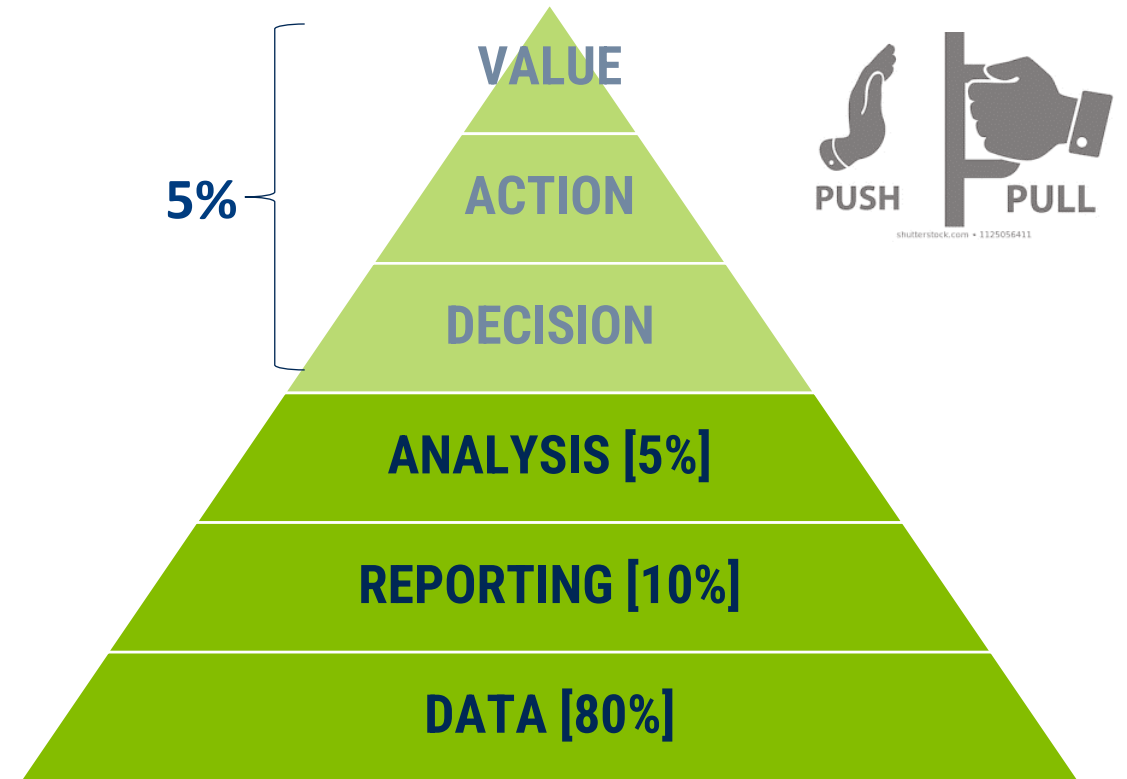
Analytics often involves studying past historical data to research potential trends, to analyze the effects of certain decisions or events, or to evaluate the performance of a given tool or scenario. The goal of analytics is to improve the business by gaining knowledge which can be used to make improvements or changes.¹

¹ "WHAT ARE ANALYTICS? DEFINITION AND MEANING." BUSINESSDICTIONARY.COM, [HTTP://WWW.BUSINESSDICTIONARY.COM/DEFINITION/ANALYTICS.HTML](http://www.businessdictionary.com/definition/analytics.html). ACCESSED 14 SEP 2020.

REPORTING

WHAT IS REPORTING?

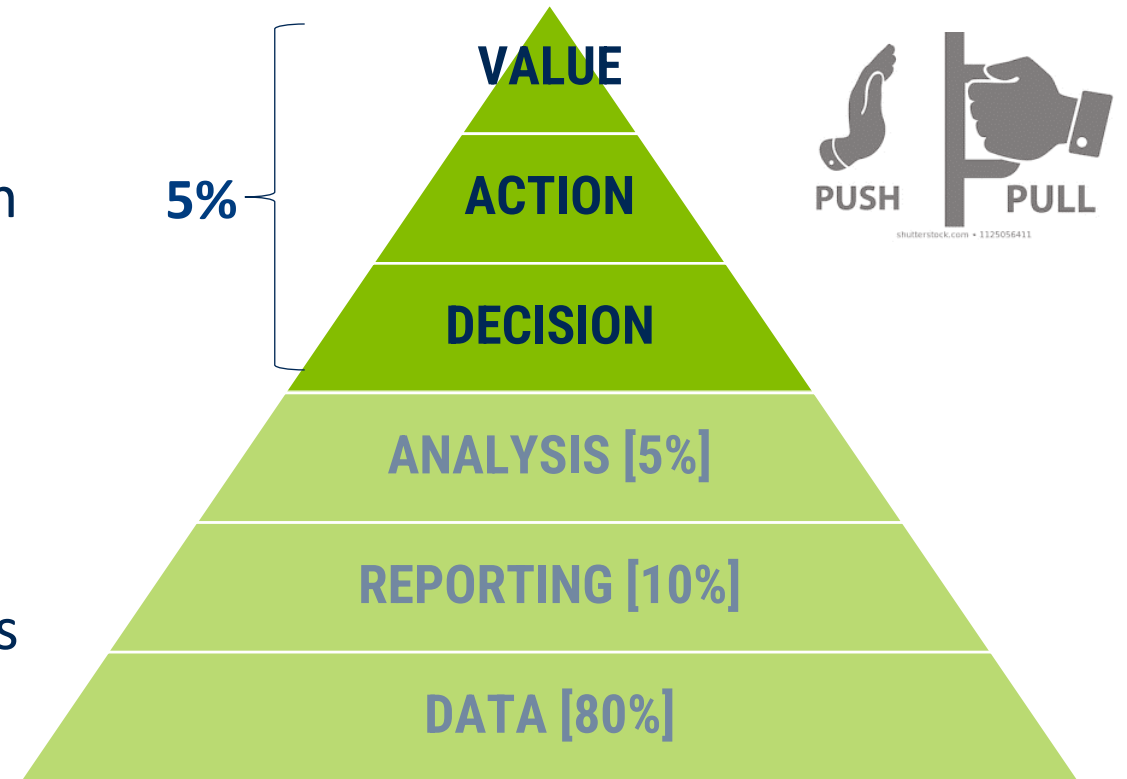
- Translating raw data into informational summaries
- Raises questions – “what is happening?”
- “Push” information to users to interpret the data to mine for insights



ANALYTICS

WHAT IS ANALYTICS?

- Transforming data, reports and information into meaningful insights
- Answers “why?” and “what can be done about it?”
- Analyst “pulls” information
- Analytics includes the tools, methodologies and techniques



ANALYTICS - THE PROCESS

- Define Scope & Approach
- Obtain Relevant Data
- Profile, Transform & Consolidate Data
- Analytics
- Reporting & Visualization
- Present Findings & Enhance

DATA



SORTED



ARRANGED



PRESENTED
VISUALLY



EXPLAINED
WITH A STORY



DATA VISUALIZATION

HOW THE BRAIN WORKS

PRE-ATTENTIVE PROCESSING

- We see with our brains rather than our eyes
- Our brains are constantly trying to make sense of what the eyes see
- The brain uses the subconscious mind to quickly identify patterns or objects that stand out and can be grouped together



ATTENTIVE PROCESSING

- The brain uses the conscious mind when patterns or objects aren't easily discernible
- Process is slower because it demands deliberate conscious attention

Transaction	ScoreL	Effective Date	Account	Account Description	Credit	Debit	Memo
1044231	2	21.4%	7/14/20	70000 Electricity	\$1,680	\$0	
1044231	2	14.4%	7/14/20	71000 Gas	\$122	\$0	
1044231	2	21.4%	7/14/20	70000 Electricity	\$1,540	\$0	
1044231	2	14.4%	7/14/20	71000 Gas	\$128	\$0	
1044231	2	40.0%	7/14/20	70000 Electricity	\$3,750	\$0	
1044231	2	14.4%	7/14/20	71000 Gas	\$138	\$0	
1044231	2	26.0%	7/14/20	70000 Electricity	\$2,300	\$0	
1044231	2	21.4%	7/14/20	71000 Gas	\$250	\$0	
1044231	2	14.4%	7/14/20	70000 Electricity	\$1,355	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$202	\$0	
1044231	2	14.4%	7/14/20	70000 Electricity	\$2,193	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$114	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$225	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$214	\$0	
1044231	2	14.4%	7/14/20	73000 Telephone	\$138	\$0	
1044231	2	14.4%	7/14/20	70000 Electricity	\$1,493	\$0	
1044231	2	21.4%	7/14/20	71000 Gas	\$180	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$163	\$0	
1044231	2	14.4%	7/14/20	72000 Water	\$68	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$115	\$0	
1044231	2	33.2%	7/14/20	70000 Electricity	\$1,100	\$0	
1044231	2	14.4%	7/14/20	70000 Electricity	\$1,784	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$257	\$0	
1044231	2	33.0%	7/14/20	70000 Electricity	\$1,100	\$0	
1044231	2	23.7%	7/14/20	72000 Water	\$200	\$0	
1044231	2	9.8%	7/14/20	72000 Water	\$133	\$0	
1044231	2	21.4%	7/14/20	73000 Telephone	\$490	\$0	
1044231	2	14.4%	7/14/20	70000 Electricity	\$1,268	\$0	

▲ HOW THE BRAIN WORKS

According to research at Cambridge University, it doesn't matter in what order the letters in a word are, the only important thing is that the first and last letter be at the right place. The rest can be a total mess and you can still read it without a problem. This is because the human mind does not read every letter by itself, but the word as a whole.

HOW THE BRAIN WORKS

7	6	2	7	6	7	8	4	3
8	6	0	3	7	1	5	7	2
8	0	5	8	6	3	3	7	9
6	4	6	5	9	7	3	8	7
4	6	9	8	2	5	9	5	6
3	5	2	3	3	7	8	1	2
0	3	3	7	9	8	8	2	3
8	0	4	0	4	7	6	5	9
5	2	5	6	3	2	4	6	2
3	9	7	2	4	1	3	5	8
9	5	6	8	0	9	1	6	9
8	4	2	4	9	2	8	4	6

HOW THE BRAIN WORKS

7	6	2	7	6	7	8	4	3
8	6	0	3	7	1	5	7	2
8	0	5	8	6	3	3	7	9
6	4	6	5	9	7	3	8	7
4	6	9	8	2	5	9	5	6
3	5	2	3	3	7	8	1	2
0	3	3	7	9	8	8	2	3
8	0	4	0	4	7	6	5	9
5	2	5	6	3	2	4	6	2
3	9	7	2	4	1	3	5	8
9	5	6	8	0	9	1	6	9
8	4	2	4	9	2	8	4	6

DASHBOARDS

STRATEGIC DASHBOARDS

EXECUTIVE SUMMARIES

- Snapshot
- High-Level metrics / KPIs
- Static



OPERATIONAL DASHBOARDS

MONITORING

- Showing changing activity
- Dynamic
- Focus on items that need immediate action
- Exception Reporting



ANALYTICAL DASHBOARDS

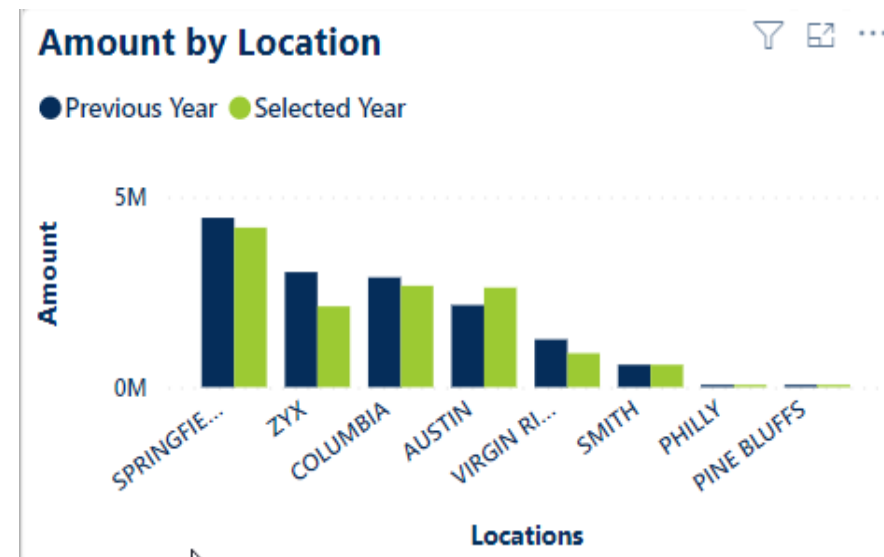
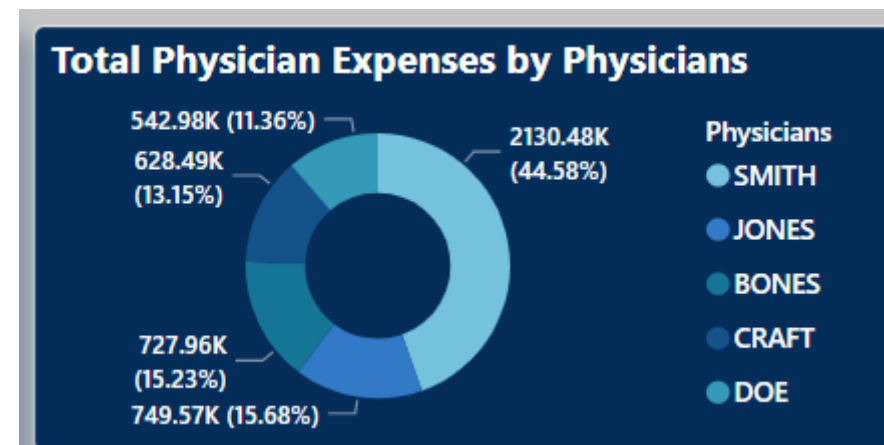
80% OF WHAT YOU WILL BUILD

- Require context
- Highly Interactive
- Rich Comparisons
- Drill Downs
- What-If Scenarios



COMMON DASHBOARDS

- PRODUCTION INFORMATION
- CLAIMS/INSURANCE DATA
- BILLING DATA;
- ACCOUNTS RECEIVABLE
- STAFFING/PROVIDER UTILIZATION
- BENCHMARKING
 - PRACTICE AVERAGE
 - STATE/NATIONAL

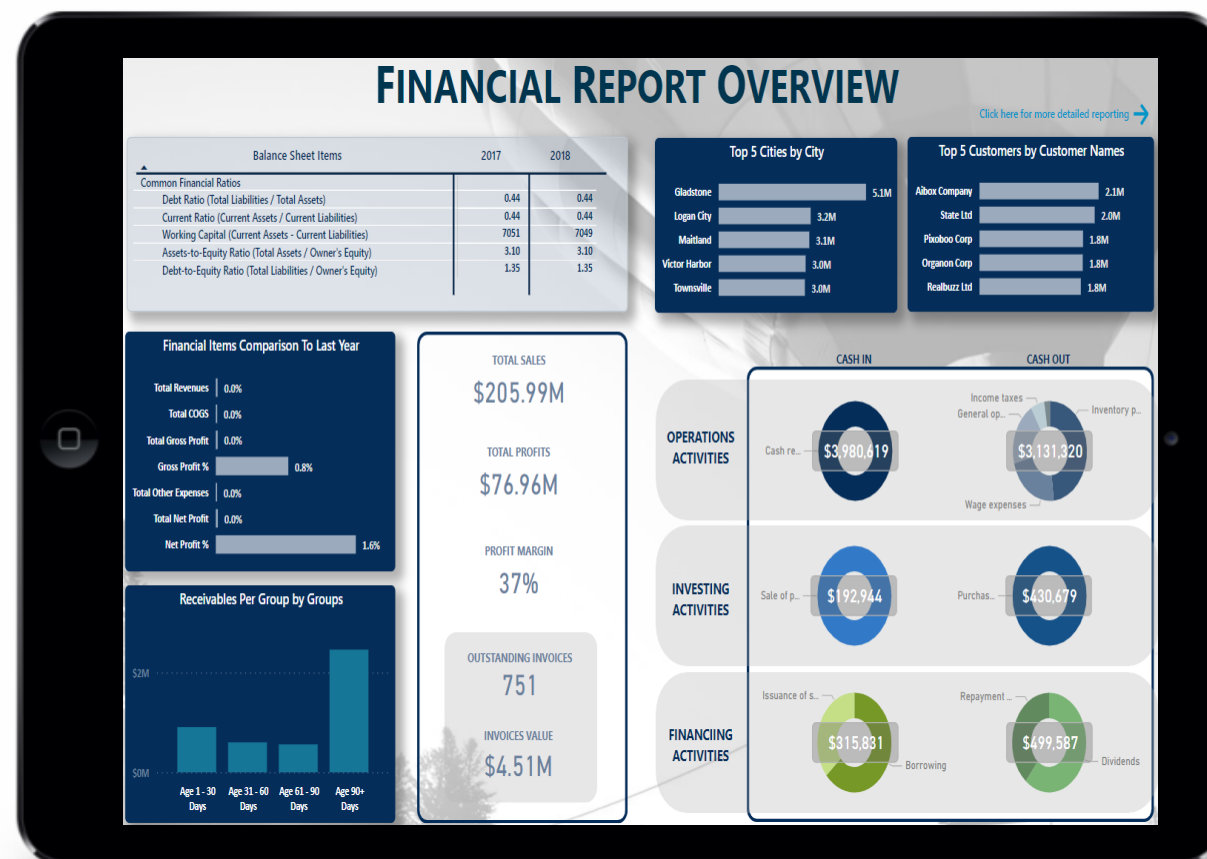


KPIs

KPIs

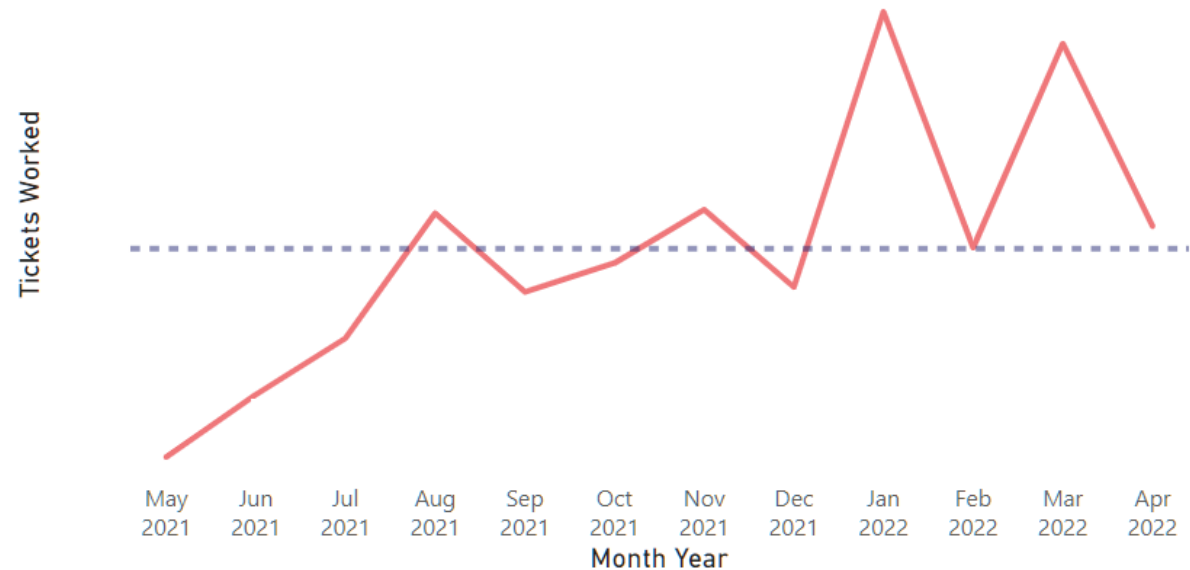
DESIGNED TO MEASURE PERFORMANCE

- What are we doing well?
- What are we doing not so well?
- Maximize Revenue
- Minimize Costs



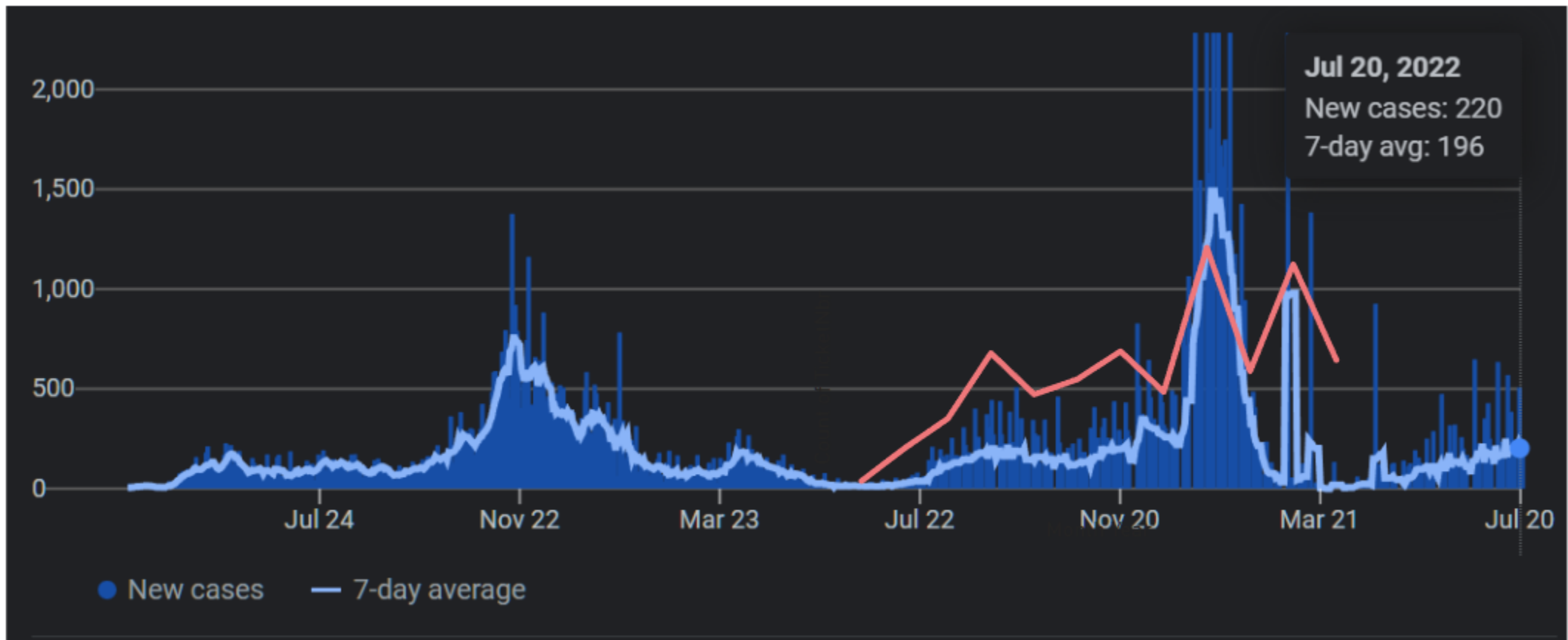
WHAT DO THE VISUALS TELL US?

Highly variable workload.



ADDING CONTEXT

Douglas County Covid Caseload



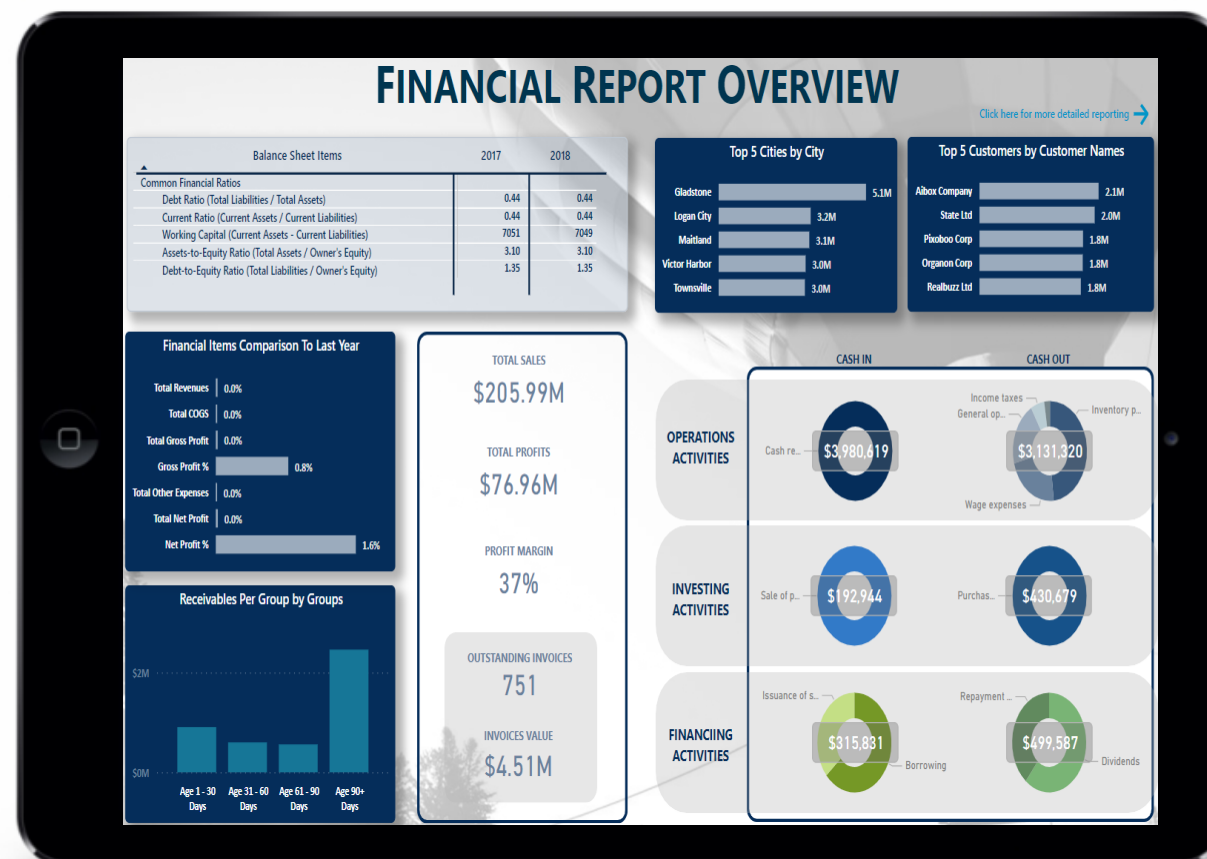
KPIs

CONTENT

- What are we measuring?
- Why are we measuring it?
- What decisions are we going to make
- What actions will we take?

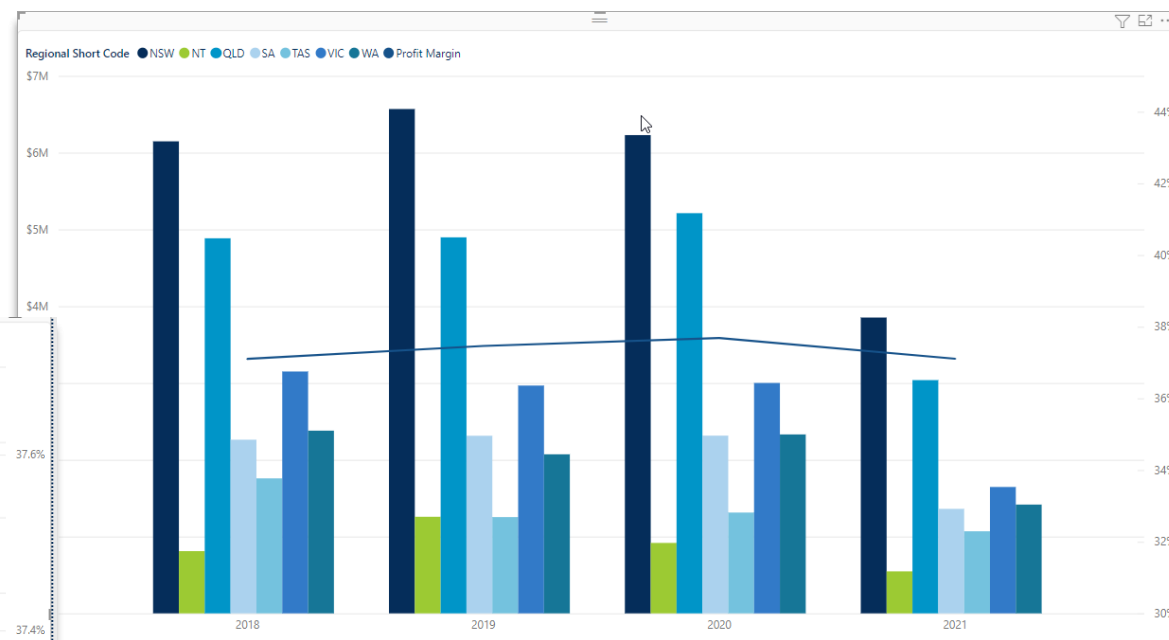
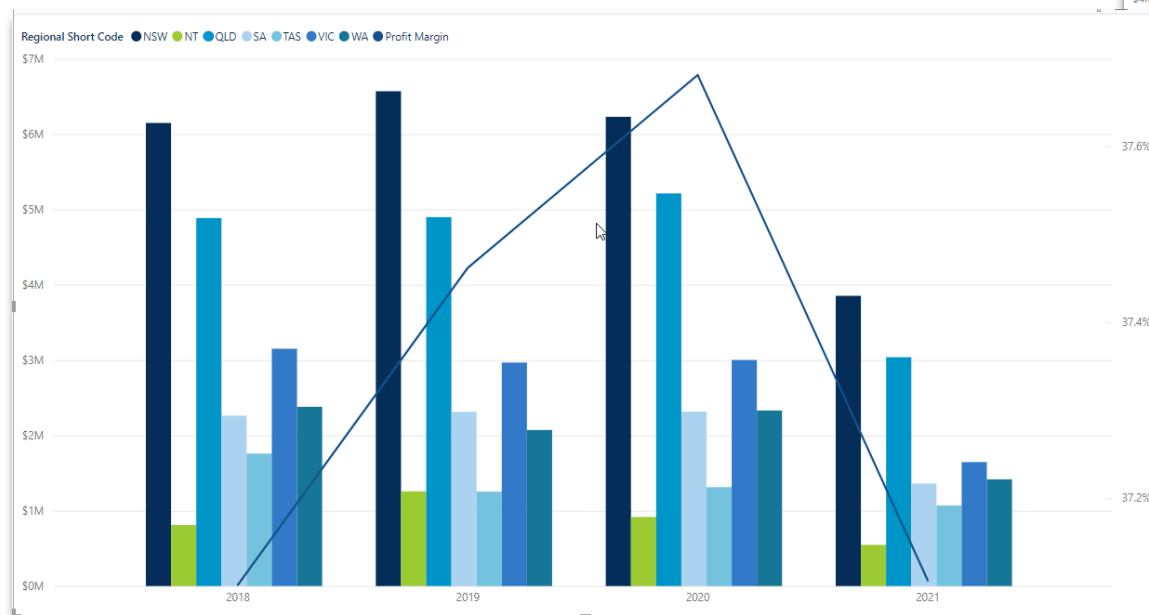
CONTEXT

- Overall, By Region, By Department
- Monthly, Quarterly, Annually
- TY vs LY or TP vs LP



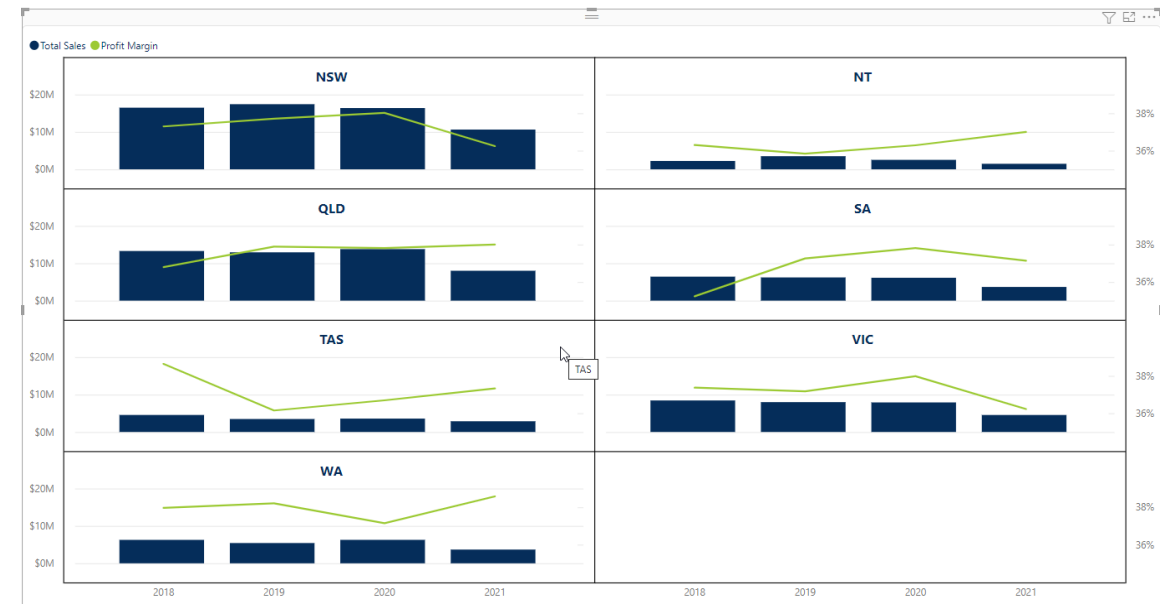
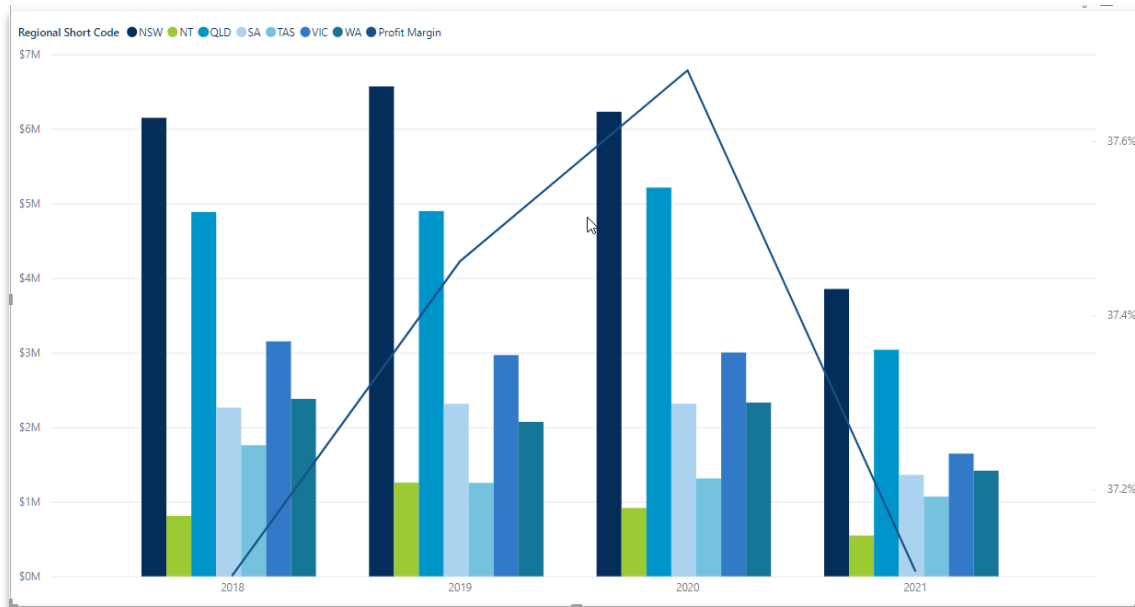
CONTENT + CONTEXT

**WHICH COMPANY IS
PERFORMING BEST?**



CONTENT + CONTEXT

**WHICH LOCATION IS
DRIVING PROFITS?**



**ARE INCREASED SALES
“GOOD” SALES?**

FINANCIAL STATS/KPIs

- **DAYS IN A/R ; A/R AGING**
- **COLLECTIONS (GROSS/NET RATIOS, DAYS TO PAY, COPAYS)**
- **DENIAL RATES**
- **WRITE OFF RATES**
- **CLAIMS/INSURANCE DATA**
- **REVENUE PER VISIT, BY DEPARTMENT, PROVIDER, LOCATION**
- **PRODUCTION DATA – BY PROVIDER, DEPARTMENT, LOCATION**
- **COST PER CASE/VISIT**
- **RATIOS OF VOLUME/REVENUE/COST**

OPERATIONAL STATS/KPIs

- **APPOINTMENTS PER DAY (PATIENTS PER DAY)**
- **REFERRERS**
- **NEW PATIENTS**
- **ACTIVE PATIENTS**
- **PATIENT VALUE**
- **STAFF UTILIZATION**
- **DAYS WORKED PER MONTH**
- **SERVICE HOURS**
- **TIME CLOCK VIOLATIONS (LOST INCOME FOR LATES)**

DASHBOARD EXAMPLES

PRACTICE INFORMATION



2018

2019

2020

2021

Q1

Q2

Q3

Q4

MGMA Year: 2020

Physician

Physician Assistant

Nurse Practitioner

Other

Charges				
Role Group	Total Charges YTD	%	PY Charges	%
Physician Assistant				
Physician Assistant 2	83,352.50	32.59%	66,110.00	35.71%
Physician Assistant 3	74,150.75	28.99%	51,635.00	27.89%
Physician Assistant 4	51,717.09	20.22%	35,537.90	19.20%
Physician Assistant 1	46,571.56	18.21%	31,851.50	17.20%
Total	255,776.90	100.00%	185,119.40	100.00%
Total	255,776.90	100.00%	185,119.40	100.00%

Total Collections	%	PY Collections	PY %
71,285.83	28.11%	53,706.11	27.24%
76,292.44	30.09%	63,542.95	32.24%
69,851.98	27.55%	52,857.19	26.81%
36,139.48	14.25%	27,020.10	13.71%
253,554.73	100.00%	197,111.35	100.00%
253,554.73	100.00%	197,111.35	100.00%

Visits			
Visits YTD	%	Visits YTD PY	%
144.00	19.25%	123.00	17.67%
243.50	32.55%	229.50	32.97%
203.00	27.14%	205.50	29.53%
157.50	21.06%	138.00	19.83%
748.00	100.00%	696.00	100.00%
748.00	100.00%	696.00	100.00%

MGMA												
Speciality	Charges	%	Charges PY	PY %	Collections	%	Collections PY	PY %	Visits	%	Visits PY	PY %
Family Medicine (with OB)	257,611.63	26.22%	255,589.63	26.22%	113,661.50	24.32%	111,639.50	24.32%	550.25	19.95%	550.25	19.95%
Family Medicine (without OB)	314,556.13	32.02%	312,534.13	32.02%	166,268.75	35.57%	164,246.75	35.57%	878.00	31.83%	878.00	31.83%
NP: Family Medicine (without OB)	195,417.88	19.89%	193,395.88	19.89%	86,796.88	18.57%	84,774.88	18.57%	615.00	22.29%	615.00	22.29%
PA: Family Medicine (without OB)	214,905.50	21.87%	212,883.50	21.87%	100,712.38	21.55%	98,690.38	21.55%	715.50	25.94%	715.50	25.94%
Total	982,476.13	100.00%	980,454.13	100.00%	467,424.50	100.00%	465,402.50	100.00%	2,758.75	100.00%	2,758.75	100.00%



PRACTICE INFORMATION

Year

Quarter Num

1

2

2021

44.57%

NetCollection%

187.48

Avg NetCollections

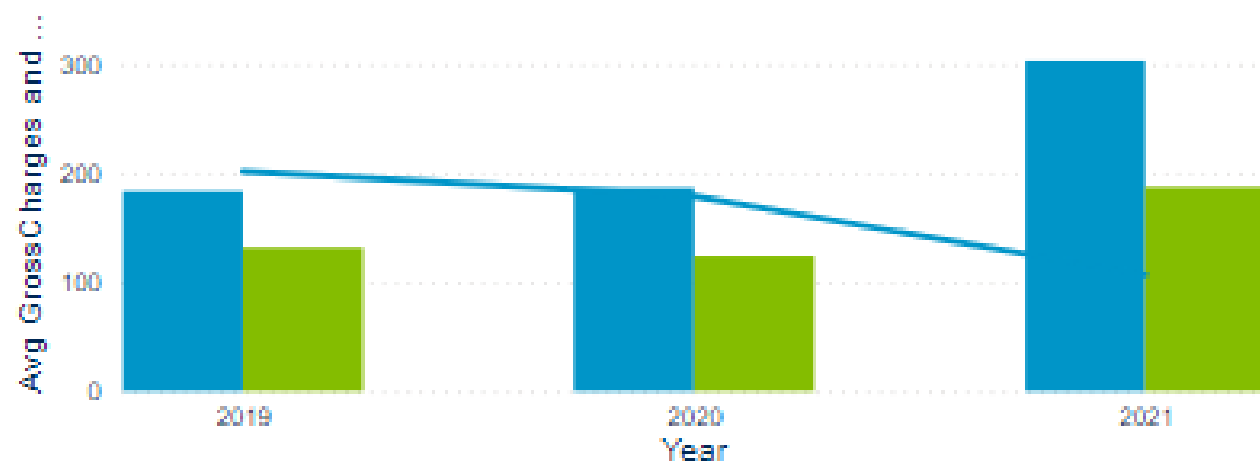
303.10

Avg GrossCharges

Name	Total Charges	%	PY Charges	%	Collections	%	PY Collections	%	Patient Visits	%	PY Patients	%
Anderson PA, Stacy A	475,948.50	40.86%	415,779.00	40.04%	178,587.10	24.79%	155,350.46	20.67%	792	20.61%	1358	22.16%
Blue PA, Brian	630.81	0.05%	800.02	0.08%	9,146.78	1.27%	11,600.32	1.54%	45	1.17%	117	1.91%
Brown MD, Jill E	2,522.97	0.22%	3,876.28	0.37%	36,583.06	5.08%	56,206.06	7.48%	465	12.10%	577	9.41%
Johnson MD, Gary A	12,059.40	1.04%	15,294.23	1.47%	174,861.26	24.27%	221,766.36	29.50%	960	24.98%	1703	27.78%
Smith MD, Trent R	668,810.25	57.42%	596,552.25	57.45%	250,969.69	34.83%	217,629.00	28.95%	918	23.89%	1639	26.74%
Williams PA, Noah	4,849.73	0.42%	6,150.63	0.59%	70,321.11	9.76%	89,184.17	11.86%	663	17.25%	735	11.99%
Total	1,164,821.66	100.00%	1,038,452.42	100.00%	720,468.99	100.00%	751,736.37	100.00%	3843	100.00%	6129	100.00%

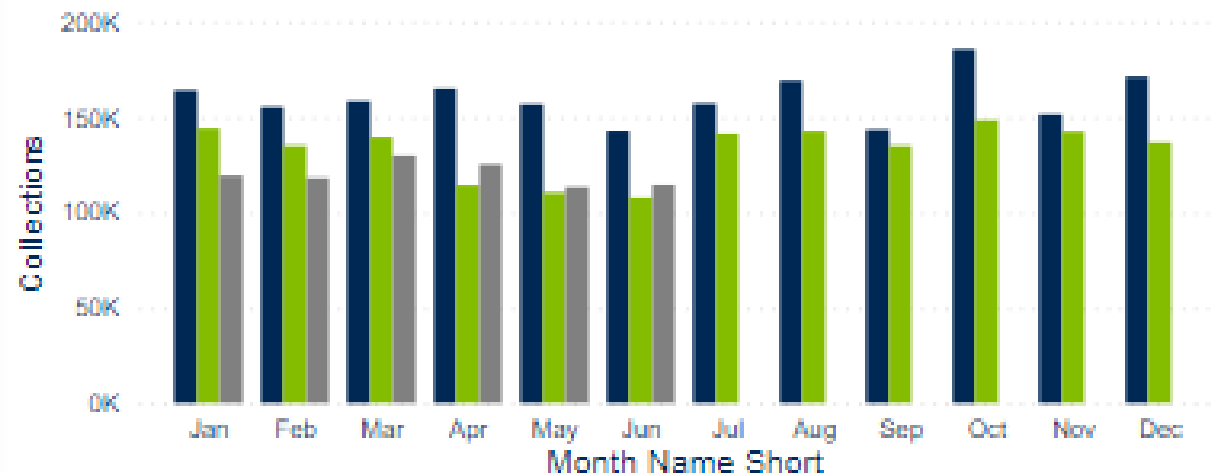
Avg GrossCharges, NetCollections and Average of Patient Visits by Year

● Avg GrossCharges ● NetCollections ● Average of Patient Visits



Collections by Month Name Short and Year

Year ● 2019 ● 2020 ● 2021



PROCEDURE CHARGES

2018

2019

2020

2021

Q1

Q2

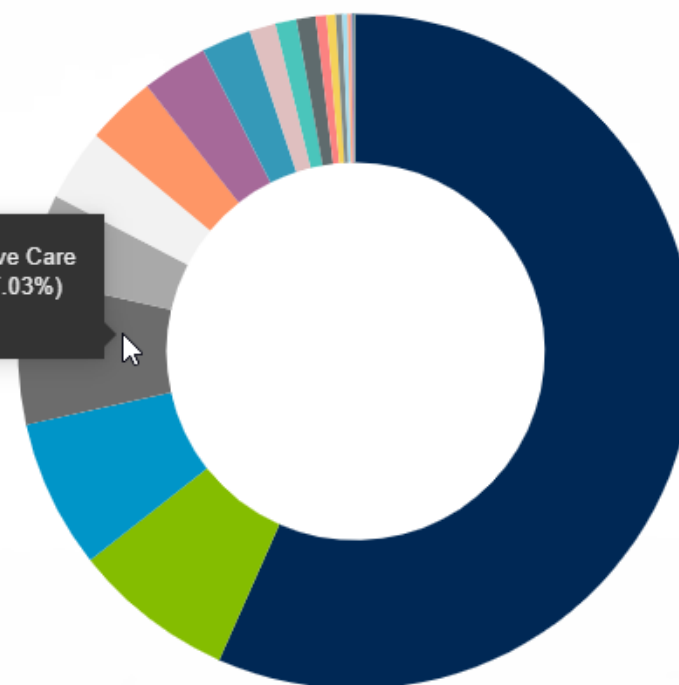
Q3

Q4

Charge Category by Type

Procedure	Charge Total YTD	%	Charges PY	% PY	YOY Change
Evaluation and Management	\$649,181	56.62%	563,636.99	58.46%	15.18%
Laboratory	\$89,052	7.77%	82,805.75	8.59%	7.54%
Immunization	\$81,753	7.13%	73,168.25	7.59%	11.73%
Preventative Care	\$80,614	7.03%	30,647.75	3.18%	163.06%
Inpatient Care	\$46,552	4.06%	36,272.00	3.76%	28.34%
Endoscopies	\$39,412	3.44%	37,751.00	3.91%	4.40%
Surgical	\$38,635	3.37%	32,195.75	3.34%	20.00%
Maternity Care	\$36,169	3.15%	27,311.75	2.83%	32.44%
Outpatient Hospital Care	\$26,993	2.35%	23,191.25	2.40%	16.40%
HCPCS_J	\$14,424	1.26%	14,864.94		
Xray	\$11,738	1.02%	14,216.00		
Injections	\$10,300	0.90%	8,328.50		
Newborn Care	\$6,038	0.53%	4,702.25		
EKG	\$5,068	0.44%	5,461.25	0.57%	-7.22%
Finance Charge	\$3,458	0.30%	3,146.20	0.33%	9.93%
Excisions Biopsy	\$2,873	0.25%	3,351.50	0.35%	-14.30%
Other	\$1,808	0.16%	1,402.21	0.14%	29.06%
Medical	\$1,331	0.12%	628.25	0.06%	112.76%
HCPCS_G	\$590	0.05%	356.00	0.04%	66.67%
HCPCS_L	\$505	0.04%	473.00	0.05%	6.73%
Business Office Procedures	\$151	0.01%	323.75	0.03%	-54.12%
Fractures/Dislocations	\$31	0.00%	5.00	0.00%	0.00%
HCPCS_A	\$5	0.00%	5.00	0.00%	0.00%
HCPCS_Q	\$5	0.00%	5.00	0.00%	0.00%
Medical Supplies	\$5	0.00%	14.00	0.00%	0.00%
Professional Services	\$5	0.00%	5.00	0.00%	0.00%
Total	\$1,146,568	100.00%	964,143.34	100.00%	18.92%

YTD Procedure Charges by Type



- Evaluation and Manage...
- Laboratory
- Immunization
- Preventative Care
- Inpatient Care
- Endoscopies
- Surgical
- Maternity Care
- Outpatient Hospital Care
- HCPCS_J
- Xray
- Injections
- Newborn Care
- EKG
- Finance Charge
- Excisions Biopsy
- Other
- Medical

Display: Procedure Category.2
Preventative Care
Charge Total YTD \$53,740 (7.03%)
%GT Charge Total YTD 7.03%



VISITS BY ROLE/PROVIDER

Year

2021

Quarter Num

1

2

3843

Patient Visits

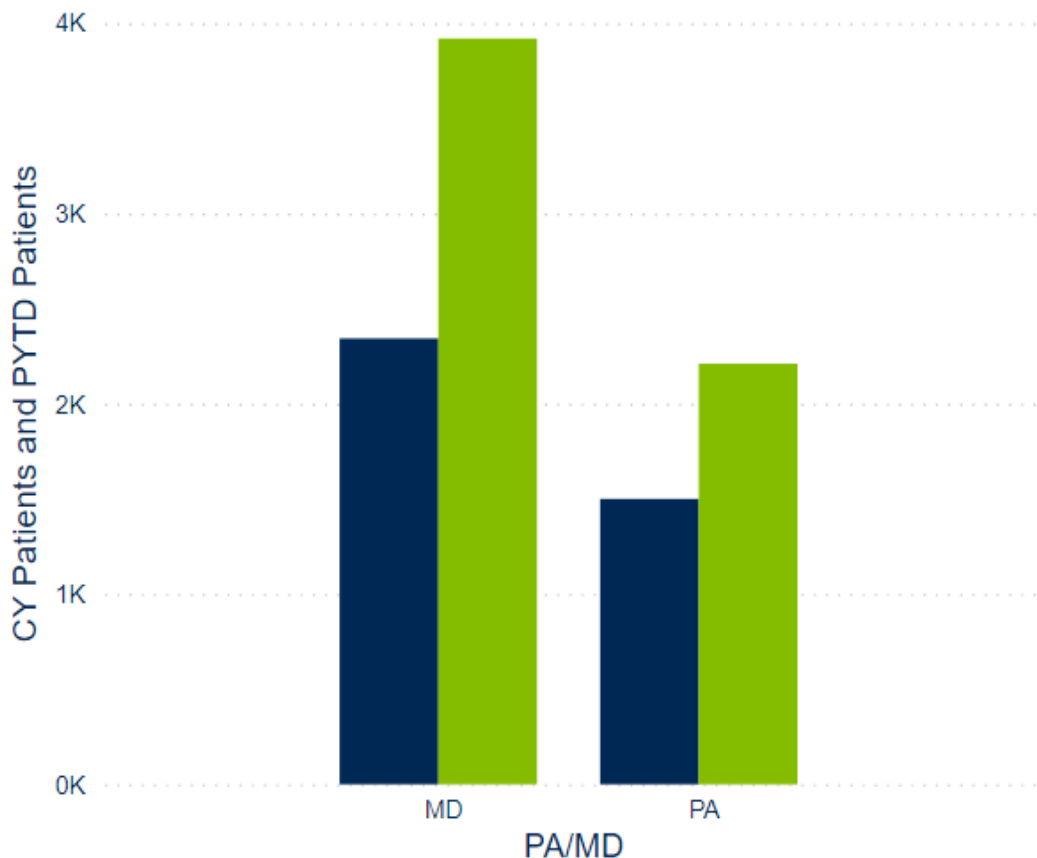
-2286

PY Patients Diff

Name	NetCollections	GrossCharges
Anderson PA, Stacy A	225.49	600.95
Blue PA, Brian	203.26	14.02
Brown MD, Jill E	78.67	5.43
Johnson MD, Gary A	182.15	12.56
Smith MD, Trent R	273.39	728.55
Williams PA, Noah	106.07	7.31
Total	187.48	303.10

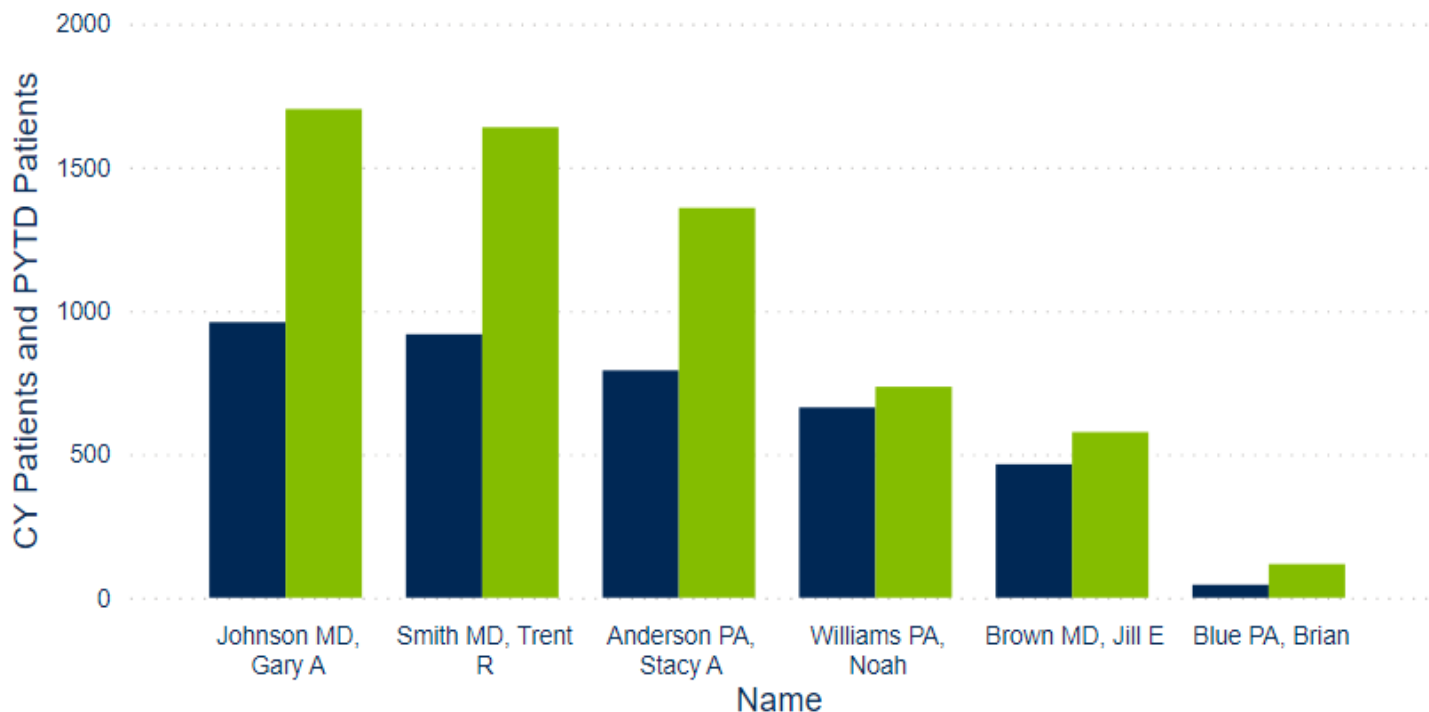
By Role

● CY Patients ● PYTD Patients



By Provider

● CY Patients ● PYTD Patients





Office Visits

NEW VISITS

Code ● 71046 ● 73610 ● 99204 ● 99205

Count of Code



73610 71046 99204 99205

of Visits

25 29 23 10

%

28.7% 33.3% 26.4% 11.5%

ESTABLISHED VISITS

Code ● 99212 ● 99213 ● 99214 ● 99215

Count of Code



99212 99213 99214 99215

of Visits

18 5 5 11

%

45.0% 12.5% 15.0% 27.5%

Year

2021



Name

All

TOTALS:

156

OF EST VISITS

103

OF NEW VISITS

PREVENTATIVE VISITS

70

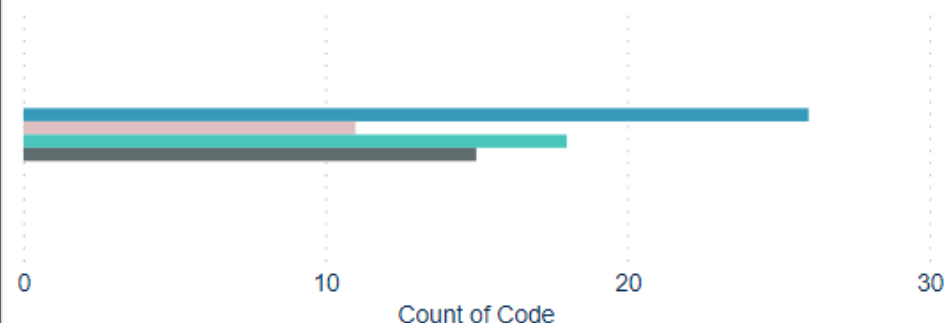
OF NEW VISITS

116

OF ESTABLISHED VISITS

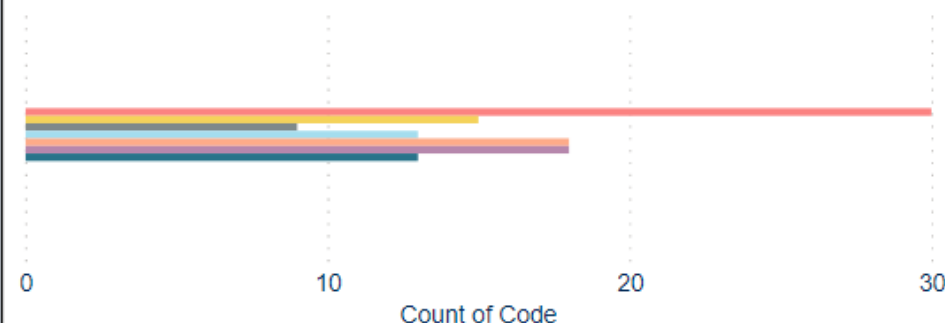
NEW VISITS

Code ● 99381 ● 99384 ● 99385 ● 99386



ESTABLISHED VISITS

Code ● 99391 ● 99392 ● 99393 ● 99394 ● 99395 ● 99396 ● 99397



PATIENT RECEIVABLES

2018

2019

2020

2021

Select a Quarter:

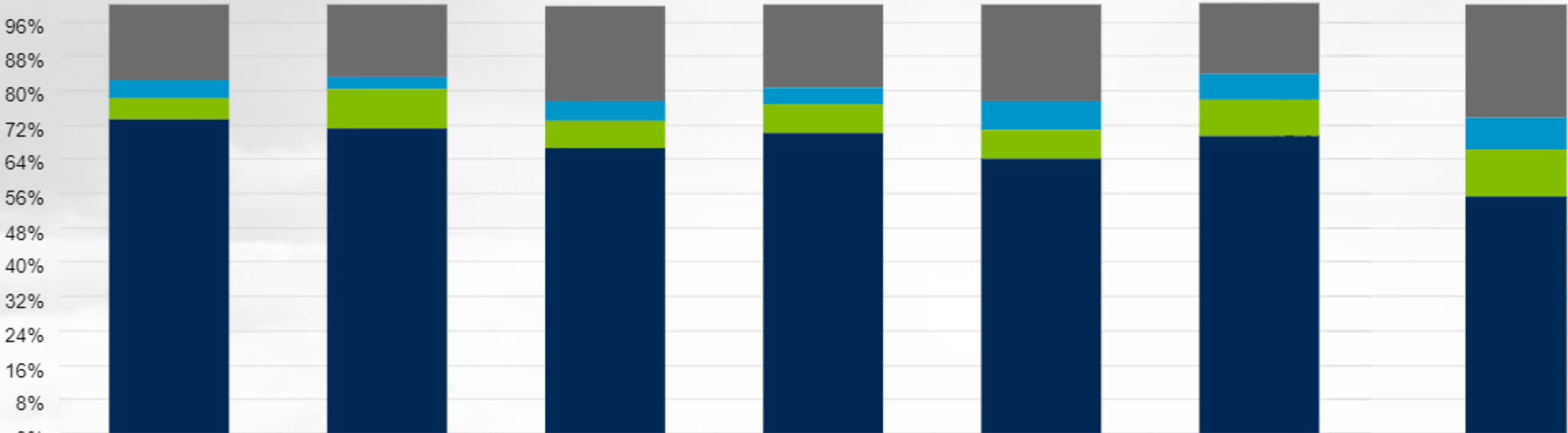
Multiple selections

MGMA Year:

2020

Patient Receivable Aging (Excluding Amount in Collections)

MGMA



	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	-
0-30	\$410,175	\$502,838	\$352,251	\$404,283	\$293,971	\$340,743	-
0-30 %	73%	71%	67%	70%	64%	69%	55%
31-60	\$27,568	\$65,487	\$32,790	\$38,141	\$30,656	\$41,234	-
31-60 %	5%	9%	6%	7%	7%	8%	11%
61-90	\$23,812	\$18,836	\$25,119	\$22,516	\$31,157	\$29,024	-
61-90 %	4%	3%	5%	4%	7%	6%	8%
91-120+	\$97,740	\$118,714	\$118,090	\$112,457	\$103,077	\$80,776	-
91-120+ %	17%	17%	22%	19%	22%	16%	26%
Aging Total	\$559,289	\$705,869	\$528,245	\$577,391	\$458,855	\$491,771	-



PATIENT RECEIVABLES

Quarter Num

1

3

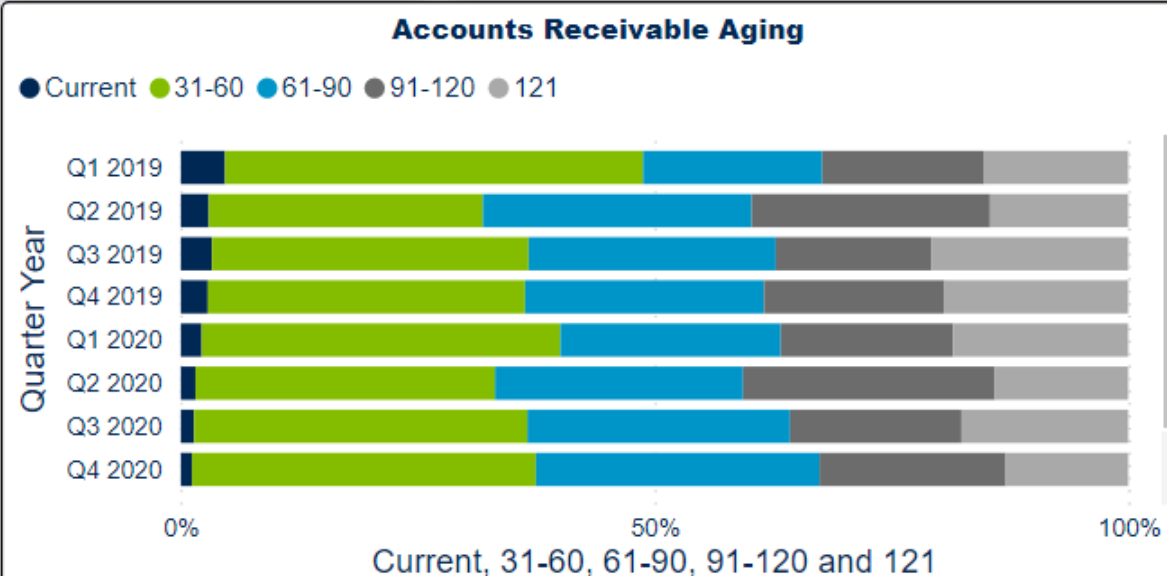
2

4

Year

Multiple selections

Quarter Year	Current	31-60	61-90	91-120	121	totalAR
Q1 2019	5,211.04	48,814.24	20,931.47	18,922.35	16,854.25	110,733.35
Q2 2019	4,313.59	41,740.35	40,957.17	36,309.24	21,098.05	144,418.40
Q3 2019	3,538.34	35,566.05	27,761.70	17,473.21	22,163.42	106,502.72
Q4 2019	2,868.65	33,324.22	25,089.80	18,975.87	19,327.36	99,585.90
Q1 2020	2,290.14	38,567.79	23,715.41	18,563.77	18,855.50	101,992.60
Q2 2020	1,790.40	35,917.00	29,731.34	30,185.74	16,023.78	113,648.27
Q3 2020	1,358.71	33,006.60	26,013.27	16,974.60	16,558.59	93,911.78
Q4 2020	985.80	29,484.39	24,307.35	15,979.65	10,530.10	81,287.29
Q1 2021	663.67	28,823.24	11,704.48	9,035.71	10,139.13	60,366.24
Q2 2021	385.40	27,181.82	17,649.21	12,215.15	6,162.67	63,594.26
Total	23,405.75	352,425.70	247,861.21	194,635.30	157,712.85	976,040.81



BY PROVIDER

Name

All

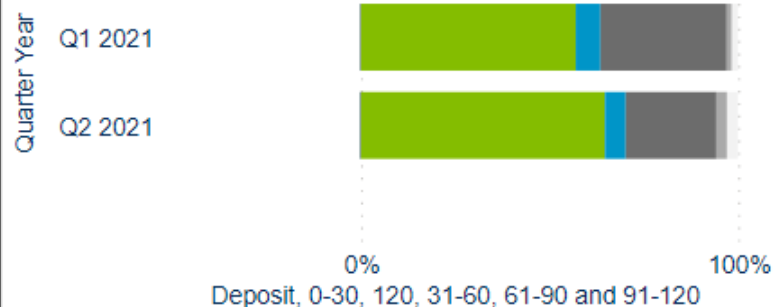
864,916.72

TotalAging

Quarter Year	Deposit	0-30	31-60	61-90	91-120	120
Q1 2021	-948.80	286,891.62	168,607.55	6,916.29	7,582.42	33,011.13
Q2 2021	-750.80	235,582.17	87,281.08	10,429.08	10,250.47	20,064.52
Total	-1,699.60	522,473.78	255,888.63	17,345.37	17,832.89	53,075.65

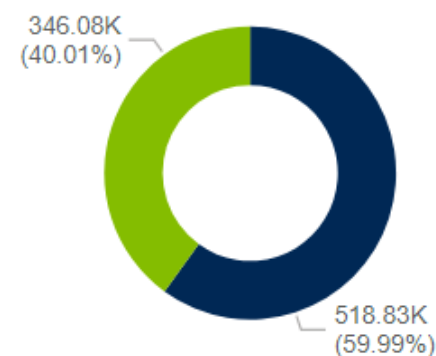
Accounts Receivable Aging

● Deposit ● 0-30 ● 120 ● 31-60 ● 61-90 ● 91-120



TotalAging by Billing

Billing ● Patient ● Insurance



2018 2019 2020 2021

Q1 Q2 Q3 Q4

E&M Year:

2016 2018

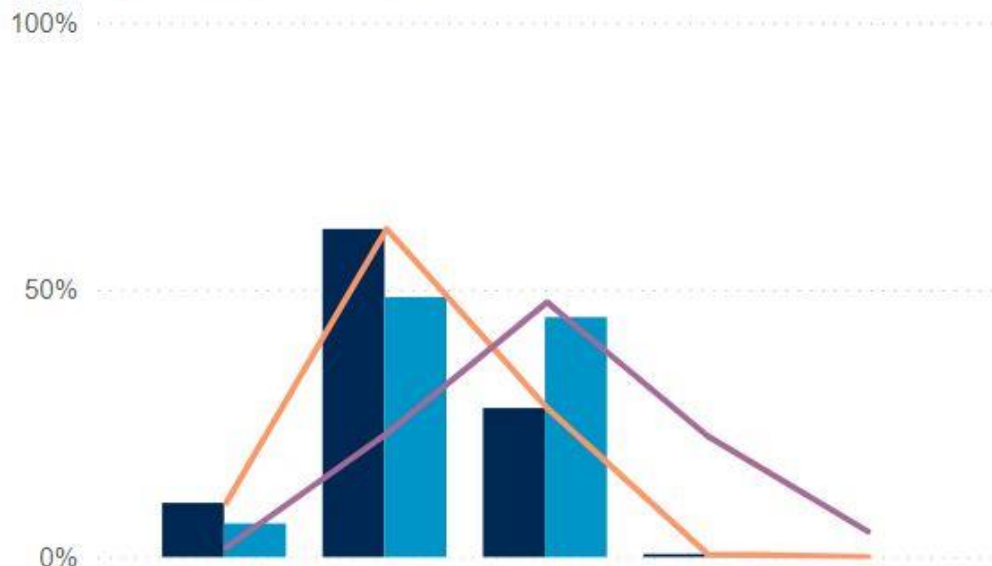
Visits as of 12/31/2020

SELECT EMPLOYEE:

All

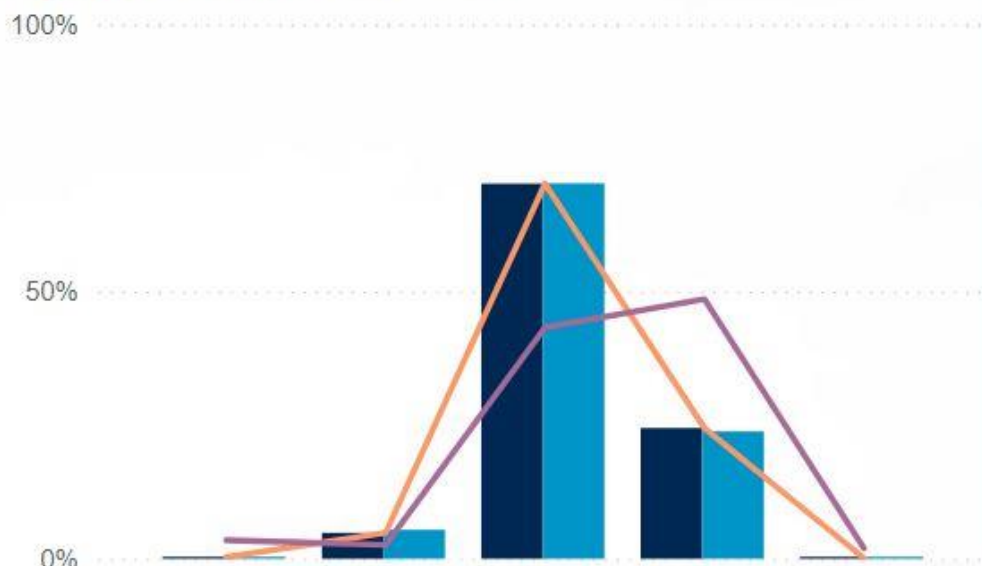
New Office Visit

● CY ● PY ● Practice ● State EM Utilization



Established Office Visit

● CY ● PY ● Practice ● State EM Utilization



2018 2019 2020 2021

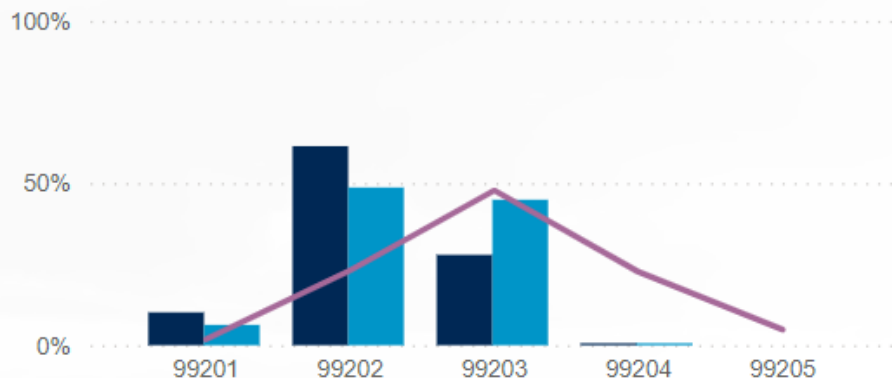
Q1 Q2 Q3 Q4

E&M Year: 2016 2018

Visits as of 12/31/2020

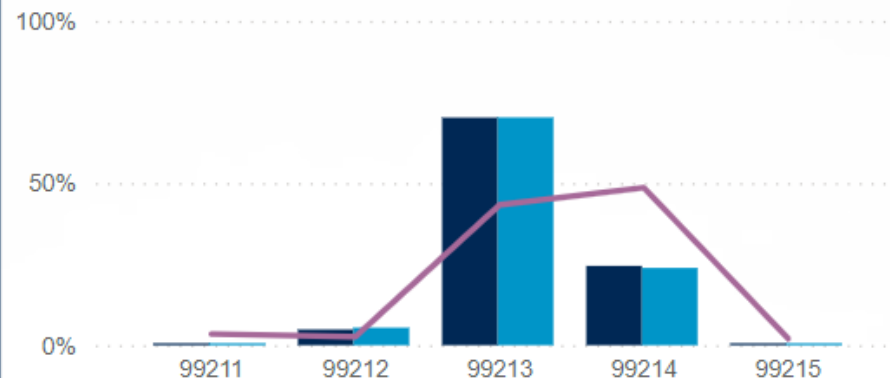
New Office Visit

● CY ● PY ● State EM Utilization



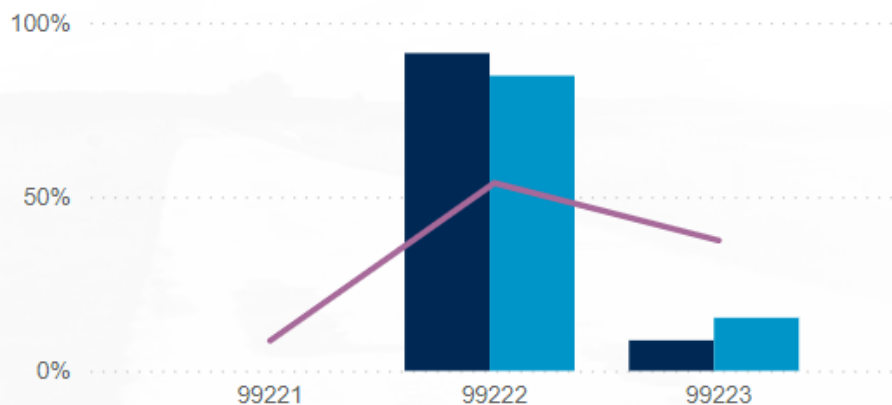
Established Office Visit

● CY ● PY ● State EM Utilization



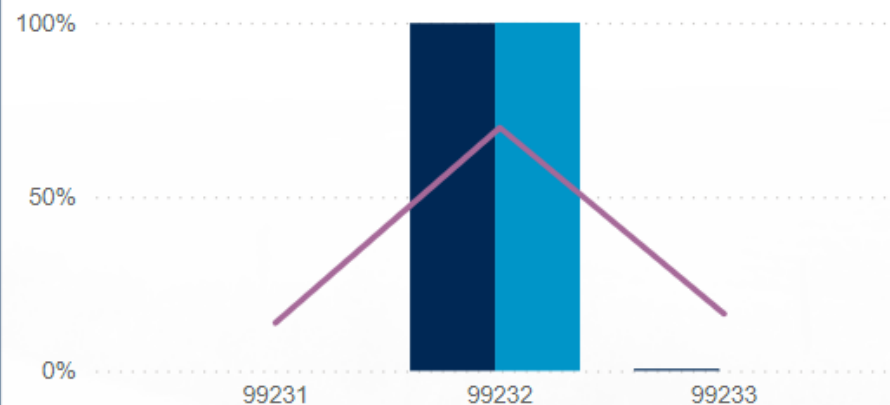
Initial Hospital Visit

● CY ● PY ● State EM Utilization



Subsequent Hospital Visit

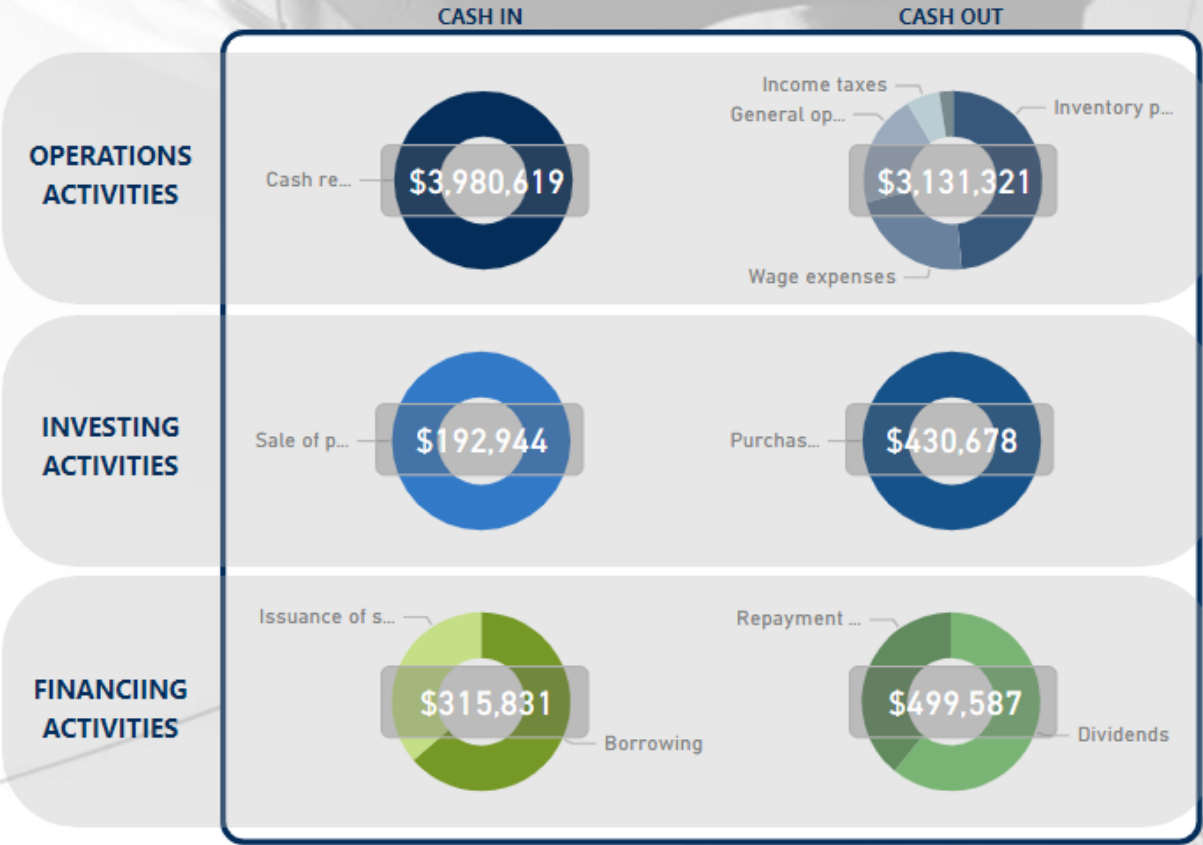
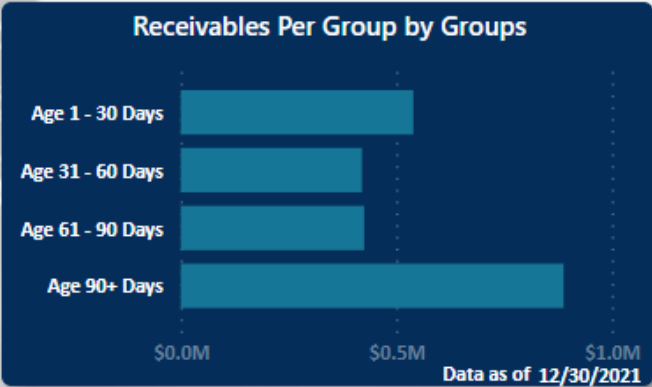
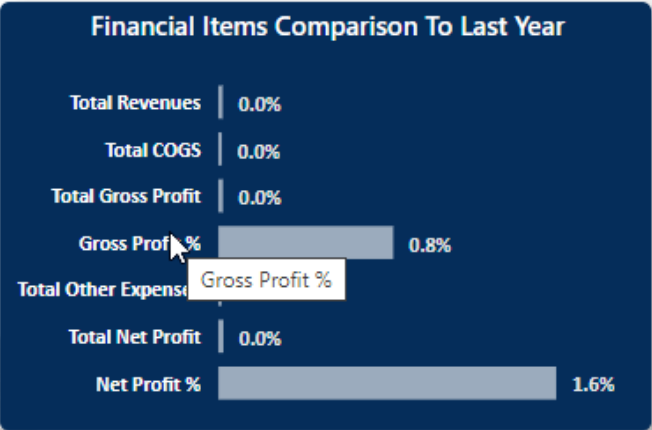
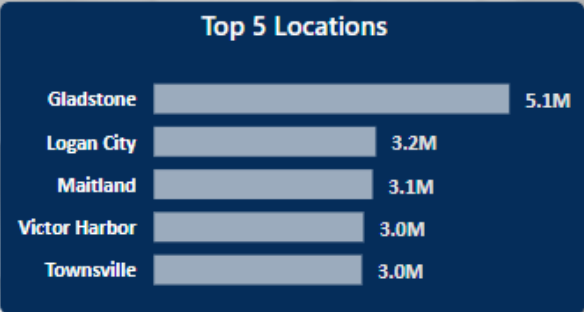
● CY ● PY ● State EM Utilization



FINANCIAL REPORT OVERVIEW

[Click here for more detailed reporting](#) ➔

Balance Sheet Items	2020	2021
Common Financial Ratios		
Debt Ratio (Total Liabilities / Total Assets)	0.44	0.44
Current Ratio (Current Assets / Current Liabilities)	0.44	0.44
Working Capital (Current Assets - Current Liabilities)	7051	7049
Assets-to-Equity Ratio (Total Assets / Owner's Equity)	3.10	3.10
Debt-to-Equity Ratio (Total Liabilities / Owner's Equity)	1.35	1.35





INCOME STATEMENT

Year, QuarterOfYear

All

Locations

All

Account Type

All

Statement of Revenue and Expenses

AUSTIN

COLUMBIA

PHILLY

PINE BLUFFS

SMITH

SPRINGFIELD

VIRGIN RIVER

ZYX

Total

Revenues									
Net Patient Revenues									
Medical Fees	0.00	30,341,846.68	27,501.59	122,586.54	5,127,918.50	42,755,805.13	11,221,103.71	24,828,583.62	114,425,345.77
Other Revenues			115,582.50		200,031.88	56,250.00			371,864.38
Pharmacy Revenue	21,436,047.65								21,436,047.65
Drug Rebates	425,464.82	631,880.26				945,047.79	338,273.06	868,082.31	3,208,748.24
Medical Records		1,913.00	21,135.00			3,111.50	935.00	3,477.50	30,572.00
Refunds-Insurance		-37,139.16	-128.54		-25,773.09	-210,408.90	-91,769.03	-167,968.63	-533,187.35
Drug Study									
E Prescribing									
Refunds-Patient		-15,286.86	0.00	-63.83	-2,174.16	-7,121.15	-3,499.05	-6,317.58	-34,462.63
Total Revenues	21,861,512.47	30,923,213.92	164,090.55	122,522.71	5,300,003.13	43,542,684.37	11,465,043.69	25,525,857.22	138,904,928.06
Operating Expenses									
Cost of Employee Labor									
Staff Wages	439,070.94	939,486.16	2,038,826.23	10,587.42	8,342.00	1,442,600.69	462,214.78	1,337,835.82	6,678,964.04
FFCRA Leave Wages	563.04	2,670.40	167.12			5,169.31	1,515.04	5,575.37	15,660.28
FFCRA 200 FMLA			441.56			442.20			883.76
Payroll Taxes	28,845.41	71,198.18	133,897.30	845.97	29.51	109,191.40	34,922.66	102,216.05	481,146.48
Group Health Insurance	17,615.94	54,445.11	115,347.83			73,253.92	38,366.21	86,735.15	385,764.16
Dental Insurance	-12.06	11.46	51.59			-21.34	-67.21	70.20	32.64
Cancer Care Policy		0.00	353.18			-577.07	34.98	79.20	-109.71
Critical Care			83.01			26.94	48.14		158.09
Voluntary Term Life	-7.22		933.04			-482.93	-13.99	59.55	488.45
Accident Insurance		0.00	282.16			754.56	31.14	62.80	1,130.66
Short Term Disability		0.00	550.85			56.90	-21.24	167.98	754.49
Whole life Insurance			28.43			466.69	-68.92	68.92	495.12
Group Disability Insurance	2,958.90	3,677.46	11,767.59			8,496.02	4,622.37	8,915.36	40,437.70
Long Term Care Insurance			4,029.72						4,029.72
Vision Insurance	-1.12	-427.80	7.42			-666.32	3.61	-11.86	-1,096.07
401K Expense	18,396.70	37,141.09	92,946.01			48,717.05	26,943.50	43,692.34	267,836.69
Profit Sharing Expense	25,297.90	35,752.11	121,789.47			51,649.36	29,969.92	32,285.95	296,744.71
Staff Licenses & Dues	932.00	861.00	2,953.44			2,285.90	312.00	778.00	8,122.34
Outside Medical Fees									
Continuing Education		245.00	3,779.00			1,910.80		372.00	6,306.80
Contract Labor					230,962.96	3,900.35		27,032.00	261,895.31



INCOME STATEMENT

Year, QuarterOfYear

All

Physicians

BONES

CRAFT

DOE

JONES

SMITH

Statement of Revenue and Expenses	BONES	CRAFT	DOE	JONES	SMITH
Physician Salary	651,749.12	543,541.35	460,534.00	680,780.16	2,009,911.60
Payroll Taxes	17,740.28	16,026.98	14,553.41	18,362.18	54,905.68
Vision Insurance			308.52		-0.09
Health Insurance	211.70	343.01	368.86	63.12	989.97
Disability Insurance	0.00	0.00	0.00	0.00	7,999.80
Voluntary Life Insurance				0.00	9.19
401 (k) Expense	14,250.04	14,250.04	14,250.04	14,250.00	
Profit Sharing Expense	23,249.96	23,249.96	23,249.96	23,250.00	
Continuing Education	875.00	50.00		85.00	2,286.00
Depreciation Expense		4,333.96			
Auto Expenses	4,306.92	16,047.09	11,814.85	1,301.33	
Licenses & Dues	4,949.00	3,838.00	6,279.00	1,206.00	14,060.00
Physician Donations	1,357.14	1,357.14	1,357.14	1,357.14	
Other Expenses	697.97	152.50	4,669.72	234.19	3,643.00
Publications	250.00				
Telephone	1,018.19	496.66	793.00	2,524.37	2,063.57
Travel Expenses				111.07	18,510.11
Computer Expense	2,500.37	0.00		718.84	3,373.79
Meals & Entertainment				527.34	
Personal Expenses	0.00		0.00	0.00	
Malpractice Insurance	4,800.00	4,800.00	4,800.00	4,800.00	12,723.00
Total Physician Expenses	727,955.69	628,486.69	542,978.50	749,570.74	2,130,475.53

Total Physician Expenses by Physicians

Physicians	Expense	Percentage
SMITH	2130.48K	(44.58%)
JONES	727.96K	(15.23%)
BONES	749.57K	(15.68%)
CRAFT	628.49K	(13.15%)
DOE	542.98K	(11.36%)

Actuals (,000) by Physician expenses categories

Category	Expense (,000)
Physician Salary	2130.48
Payroll Taxes	121.59
Profit Sharing Exp...	57.00
401(k) Expense	57.00
Auto Expenses	31.92
Malpractice Insur...	18.62
Licenses & Dues	8.00
Travel Expenses	18.62
Other Expenses	8.00
Disability Insurance	8.00
Telephone	6.59
Computer Expense	6.59
Physician Donatio...	4.33
Depreciation Exp...	4.33
Continuing Educa...	1.98
Health Insurance	1.98
Meals and Enterta...	0.31
Vision Insurance	0.31
Publications	0.01
Voluntary Life Ins...	0.01
Personal Expenses	0.01



Practice Revenue

Year, QuarterOfYear

Multiple selections

Locations

All

Income Statement

Income

Category	Previous Year	Selected Year	Increase/Decrease	Percent of Total
Medical Fees	11,806,839.79	10,011,677.31	-1,795,162.48	76.44
Pharmacy Revenue	2,026,266.40	2,599,214.60	572,948.20	19.84
Drug Rebates	583,358.85	471,564.21	-111,794.64	3.60
Other Revenue	40,477.50	32,350.00	-8,127.50	0.25
Medical Records	4,109.50	2,329.00	-1,780.50	0.02
Drug Study	0.00	0.00	0.00	
Revenue - Other	0.00	0.00	0.00	
Refunds - Patient	-5,854.57	-1,092.04	4,762.53	-0.01
Refunds - Insurance	-75,428.18	-18,338.03	57,090.15	-0.14
Total	14,379,769.29	13,097,705.05	-1,282,064.24	100.00

Amount by Location

Previous Year Selected Year



The following compares year 2022, quarter(s) 1 to the previous year and quarter. Net Patient Revenue decreased by -1,282,064.24.

AUSTIN has increased by \$459,341.03.

has decreased by \$0.00.

SMITH has decreased by (\$33.86).

PINE BLUFFS has decreased by (\$119.54).

PHILLY has decreased by (\$2,739.43).

COLUMBIA has decreased by (\$219,396.26).

SPRINGFIELD has decreased by (\$256,684.03).

VIRGIN RIVER has decreased by (\$363,255.72).

ZYX has decreased by (\$899,176.43).

Pharmacy Revenue has increased by \$572,948.20.

Refunds - Insurance has increased by \$57,090.15.

Refunds - Patient has increased by \$4,762.53.

Medical Records has decreased by (\$1,780.50).

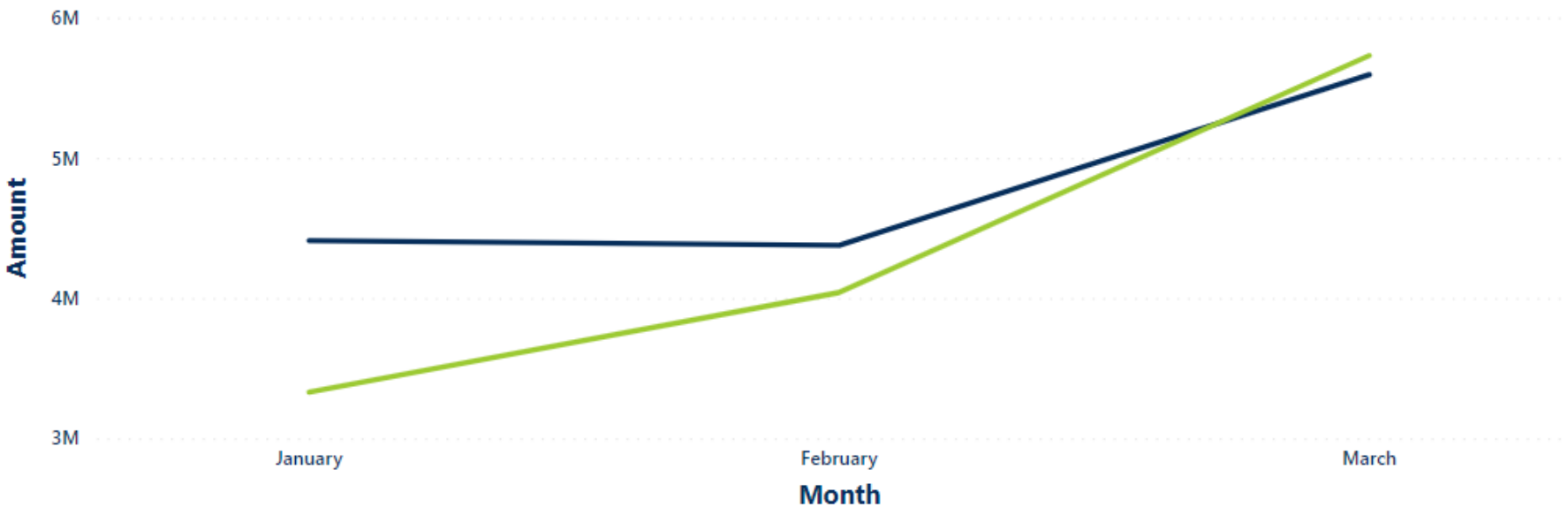
Other Revenue has decreased by (\$8,127.50).

Drug Rebates has decreased by (\$111,794.64).

Medical Fees has decreased by (\$1,795,162.48).

Amount by Month

Previous Year Selected Year



Top revenues for 2022

Medical Fees:\$10,011,677.31

Pharmacy Revenue:\$2,599,214.60

Drug Rebates:\$471,564.21

Top locations for revenue in 2022

SPRINGFIELD:\$4,190,249.66

COLUMBIA:\$2,662,399.82

AUSTIN:\$2,614,209.78

Top increases

Pharmacy Revenue:\$572,948.20

Refunds - Insurance:\$57,090.15

Refunds - Patient:\$4,762.53

Top decreases

Medical Fees:(\$1,795,162.48)

Drug Rebates:(\$111,794.64)

Other Revenue:(\$8,127.50)

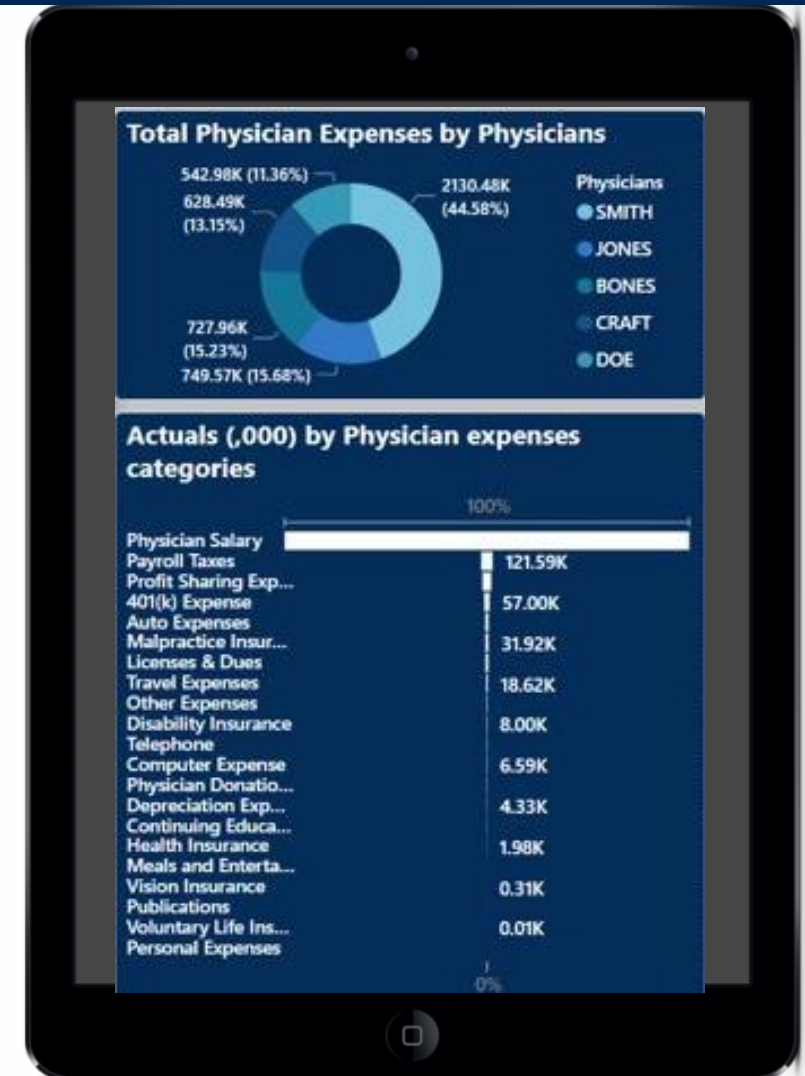
Percentage of total revenue

OBTAINING THE DATA

PROPER TRACKING

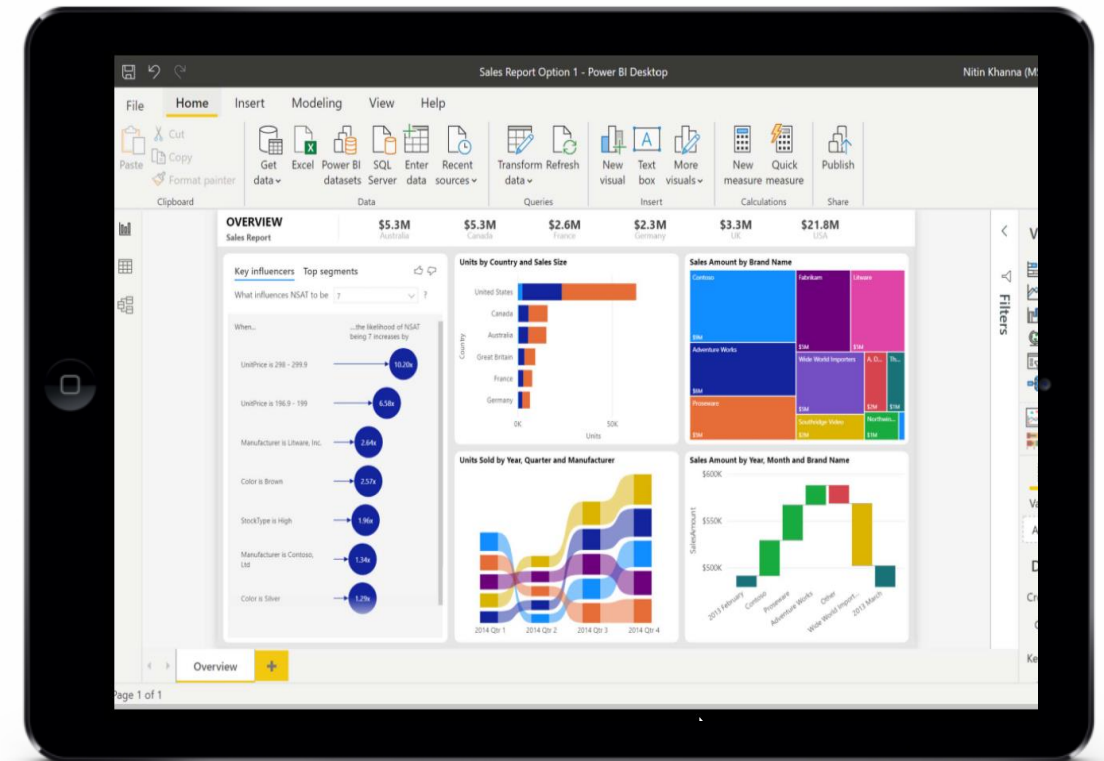
ACCOUNTING & EMR SYSTEM

- Timely, accurate data entry
 - Train employees performing manual process
- Proper classification/tracking
- By Provider, Location, or Department
- Use the tools/resources available



OVERVIEW: TURN DATA INTO OPPORTUNITY

- Data visualization tool
- Getting started is FREE
- Unify many different data sources
- Drive Business Insights
- Distribute Interactive Reporting via web, mobile, desktop or Apps
- Pro and Premium Licensing Available



QUESTIONS?
