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Advanced Business
Intelligence for
Medical Practices

BY NATE MOORE, CPA, MBA, FACMPE

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Focus Topics:

Business Intelligence
Data Analytics & Reporting

Book Overview

Even Better Data, Better Decisions — Advanced Business Intelligence for Medical Practices, by Nate Moore, is a sequel to *Better Data, Better Decisions*. The content is all-new and builds on the foundation provided by that earlier book. It is organized in two sections — the first outlines a new technology-driven vision for Business Intelligence in a medical practice, while the second offers real-world examples from practices across America that have embraced this vision.

Chapter 1

Getting Started. Business Intelligence is defined here as a collection of processes that pull data from all across an organization, to support decision making in real time. Moore wants practices to benefit from applied spreadsheets, PivotTables, dashboards, emails, maps, visualizations, and other tools that drive practice performance, automatically refresh, and can be customized by end users *without* needing any IT support. Useful new Excel features and the pros and cons of cloud data storage are also discussed.
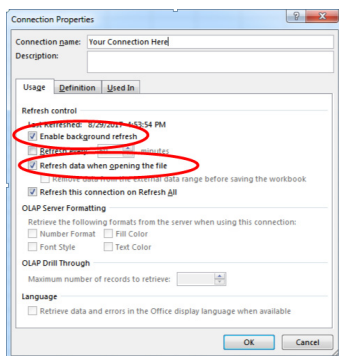
Chapter 2

Communicating Your Business Intelligence Vision. The old labor-intensive reporting model meant building one report at a time. The new model is to build one dataset and from it generate dozens (even hundreds) of useful reports that boost efficiency and solve or prevent problems. This chapter covers the basics of the Business Intelligence vision and how to communicate it to administrators, physicians, managers, and staff.

Chapter 3

Business Intelligence Tools. PivotTables and other tools presented in the previous volume are recapped here, but the main focus of this chapter are the new powerhouses: SQL Server Reporting Services (SSRS), Power BI, PowerPivot and the Excel Data Model, Maps, SQL Server Integration Services (SSIS), and SQL Server Analysis Services (SSAS). Most practices that follow the Business Intelligence vision will start out with PivotTables and move on to using more complicated tools like SSRS, but the real benefits come from integrating them in appropriate ways.
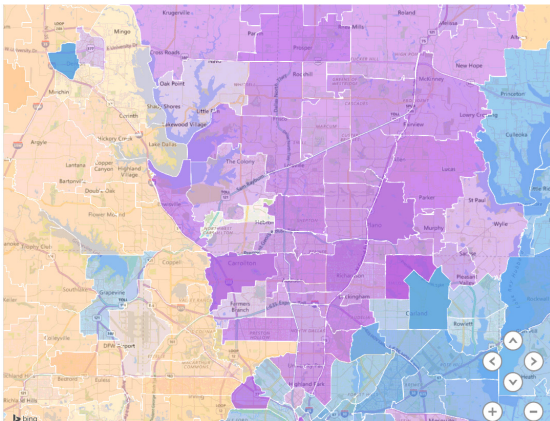
Chapter 4

Payer Contracting. With the basics in place, it's time to address practical applications. This chapter presents a broad view of the challenges involved in payer contracting, and how to use the collected Business Intelligence tools to meet those challenges. It covers creating a master Contract Analysis Spreadsheet, a Patient Balance Estimator, Payer Contract Rate Spreadsheets, and an advanced Contract Payment Manager. It also shows how to create useful datasets based on the procedure codes from denied claims and the adjustment group codes and reason codes from the EOB. Finally it addresses tracking

successful payment appeals, setting billed charges, and the future of payer contracting.

Chapter 5

Attracting Patients. Without patients a practice doesn't exist, and without new patients it can't thrive. Using these new data and reporting tools to attract patients, and tapping publicly available medical data from The Centers for Medicare & Medicaid Services (CMS) to your practice's benefit, are the subjects covered in this chapter. It discusses tracking referral sources and trending referring physicians, using zip codes and other useful location mapping techniques, and analyzing patient loyalty by location and provider. Finally, it covers useful ways to understand Payer changes within a market, and how to make sure a practice maintains the right primary care practice panel size.

Chapter 6

Seeing and Managing the Future by Analyzing Appointments. This is the longest chapter in the book because it focuses on using appointment data to allow a practice to project and manage a practice's future, making sure it doesn't miss opportunities for viable growth or savings. Fully ten different ways are shown, for example, to use PivotTables for pulling useful predictions out of unsold appointments; and after that the chapter covers many other ways for a practice to tap "routine" information in order to project reliable estimates of upcoming activity, necessary staffing, and other needs.

Chapter 7

Measuring Productivity. Practice managers are always being asked to do more with less — now more than ever. This chapter explores 12 different measures using Business Intelligence tools that can increase productivity: Provider Productivity Using Work RVUs, Which Provider To See Next, Front Desk Balances to Collect, Physical Therapy Productivity, Lag Days, Data Entry, Collection Activities, Clinical Scheduling, Duration, On-Time Board, and Resource Utilization.
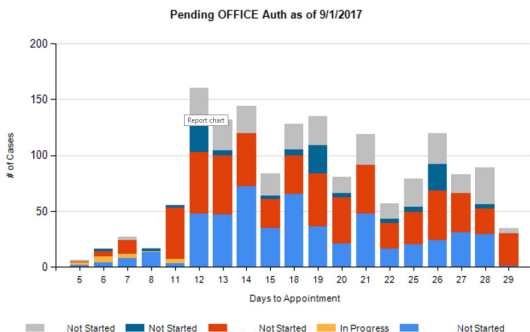
Chapter 8

Don't Tell the Boss How Easy This Is: Automating Recurring Reports. Automating reports is such a critical time saver that it's often the first Business Intelligence project implemented in a practice. This chapter shows how easy it is to automate reporting, making critical data available in minutes instead of hours or days, and putting it directly into the hands of the staffers who need it most. In a typical practice, reports can be a costly drain on time and energy. The more the process can be automated, the faster and more reliable it becomes, which means managers can spend time acting on reports

instead of creating them. Practical examples are provided, including Changes in Charges and Payments, Payer Mix Changes, Trending Accounts Receivable Balances, Trending Patient Credit Balances, Pre-Authorization Tracking, Tracking Specific Patients, and more. The final part of the chapter covers technical issues related to automating reports and how to avoid potential data entry problems.

Chapter 9

Business Intelligence with Clinical and EHR Data. This chapter shows how to leverage clinical and Electronic Health Record (EHR) data. Many of the presented reports integrate these with practice management data in order to better serve patients. Examples include: Following Up on No-Shows and Appointment Cancellations, Patients Who Need an X-Ray, Narcotics Prescribed Without an Appointment, Upcoming Appointments Needing Clinical Data, Following Clinical Protocols, Tracking Specific Diseases, External Tracking Registries, Mining Clinical Data to Improve Patient Care, and Using Clinical Data to Find Missing Charges.
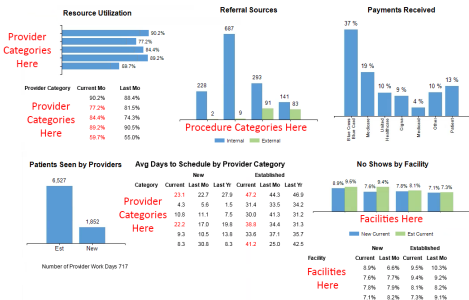
Chapter 10

Coping with Compliance. Complying with government and payer mandates is a growing drain on practice resources, so it makes sense to use Business Intelligence tools to handle it faster and more effectively. This chapter covers that topic and shares six detailed real-world examples, dealing with: Medicare Credit Balances, Tracking Compliance in Quality Reporting, Missing Quality Codes, Simplifying compliance for Pain Management Providers, Testing Data Before Submitting It to a Registry, and Complying With Billing Requirements.

Chapter 11

Dashboards. Dashboards are an integral tool for optimizing Business Intelligence and sharing data with all members of a practice. They can grow to be quite sophisticated and large, but if you are new to their use it is best to start small. This chapter provides sample dashboards from all across the country, each created for a different purpose and intended for use at different levels within a practice's management hierarchy. They provide useful starting points that can be adapted to almost any practice's needs.

Chapter 12

Business Intelligence in Your Practice. This final chapter concludes with specific suggestions for overcoming any hurdles that may be in the way of applying these new tools within a practice, and how to approach a complicated but powerful field in a straightforward, step-by-step way.

Appendices

The first appendix covers SQL Server reporting Services (SRSS) in detail. The second goes into similar depth concerning other important data tools a practice could benefit from using, including Power BI, PowerPivot, the Excel Data Model, Excel Maps, SQL Server Integration Services (SSIS), and SQL Server Analysis Services (SSAS).

*Even Better Data, Better Decisions —
Advanced Business Intelligence for
Medical Practices* is available in trade
paperback and eBook.

Buy it and other MGMA books at
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