FORV/S®



Creating Healthcare Insights With Solver & Power Bl

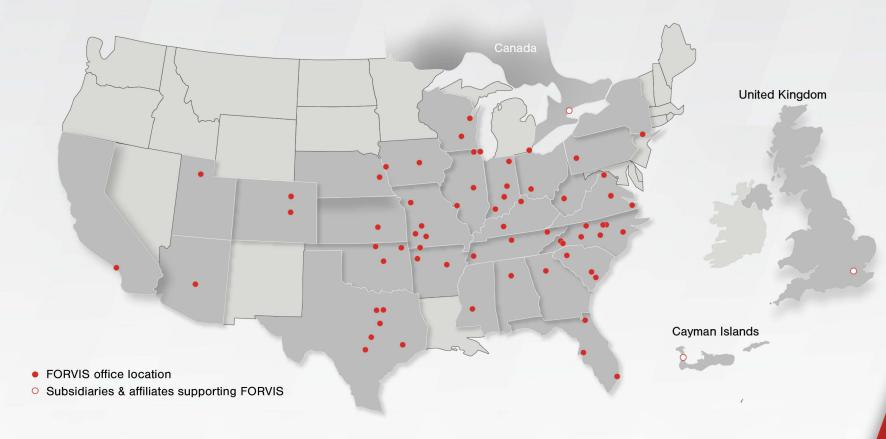
November 8, 2023

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- You must respond to at least 3 of the 4 polling questions per CPE hour
- You must be logged in for a minimum of 50 minutes per every CPE hour in order to receive CPE credit



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FORVIS Wealth Advisors, LLC

- FORVIS Global Advisory Canada ULC**
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States + Canada, U.K., & ** Cayman Islands

10+ Industries

68

Markets

500+

6,000+

Partners & Principals

Team Members





alliance of independent accounting firms that offers

Business Technology Solutions

Business Technology Solutions at **FORVIS** provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.



We are an award-winning partner of Solver Global, which itself is highly rated by G2.



Microsoft Partner









From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenter



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Creating Healthcare Insights With Solver & Power Bl

November 8, 2023

Objectives

- Recognize how a cloud-based data warehouse can be used as a single source of truth for reporting & planning
- Explain how data from multiple systems can be combined for reporting & planning
- Describe how dashboards can be created using Power BI & the Solver data warehouse

Agenda

12:00 p.m. CT

Introduction

12:05 p.m.

Pulling It All Together

12:15 p.m.

Gaining Insights

12:35 p.m.

Planning Ahead

Introduction





About FORVIS BTS Healthcare Experience

- Hospitals & Clinics
- Senior & Assisted Living Care
- Anesthesia Associations
- Visiting Nurse Associations
- Hospice Care

Healthcare Data



EHR/EMR



Accounting



Payroll



Materials Management



Reporting & Planning Challenges

- Multiple systems
- Actual, budget, & pro forma data
- Sharing with different stakeholders



Putting It All Together



The Data Warehouse

- Single source of truth
- Understandable data

Putting It All Together











PLANNING DASHBOARDS













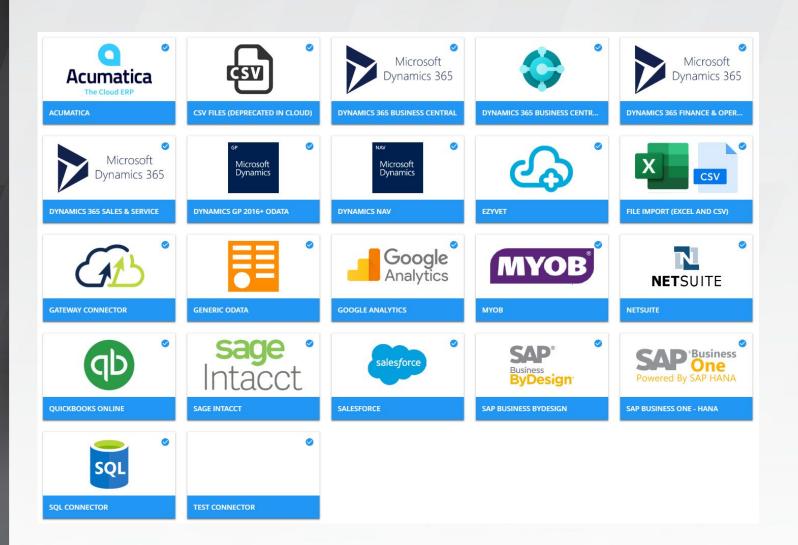




FORV/S

Pulling in Data

- Prebuilt connectors
- Generic connectors





Gaining Insights



Solver Reports

- Data warehouse-driven
- Excel report design
- Online viewing & sharing



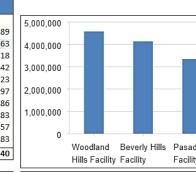
Solver Reports

- Financial report
- Multiple clinics
- Drilldown
- Graphics

Solver Healthcare Consolidated Profit and Loss Detail Report

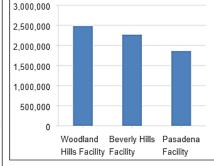
October, 2021

Account	Account Descriptions	Woodland Hills Facility	Beverly Hills Facility	Pasadena Facility	Total
Revenue	Account Descriptions	racility	racility	racility	IOCAI
	ID Develope	545.000	F70.4F6	472.740	4 500 000
41000	IP Revenue	645,993	573,156	473,740	1,692,889
42000	OP Revenue	3,203,273	2,906,421	2,343,270	8,452,963
42001	OP Revenue Non-IDTF	224,816	203,871	160,831	589,518
43000	Phys Revenue	397,316	359,002	289,124	1,045,442
44000	Tech Fees	20,765	18,688	14,470	53,923
45000	Charity Revenue	70,720	60,497	51,780	182,997
48680	Medical Records	513	501	372	1,386
49000	Other Rev-Non Operating	6,593	6,054	4,635	17,283
49010	Interest Income	171	156	131	457
49050	Gain/Loss on Settle AP	3,841	3,671	2,871	10,383
	Total Revenue	4,574,002	4,132,016	3,341,223	12,047,240



solver

Cost of Sa	los				
		242 500	100.550	154 104	550 070
52500	Provision for Bad Debt - IP	212,580	183,669	154,121	550,370
52510	Provision for Bad Debt - OP	181,618	156,983	125,155	463,756
52550	Recovery From Bad Debts	4,666	4,199	3,347	12,212
52600	Charity Care Expense IP Hospital	1,080	962	752	2,794
52601	Charity Care Expense IP District	1,026	943	791	2,760
52610	Charity Care Expense OP Hospital	10,301	9,558	7,315	27,174
52620	Other - Commercial IP	185	157	128	470
52630	Other - Commercial OP	2,999	2,837	2,108	7,943
52700	Contractual - Medicare IP	176,753	162,324	125,531	464,607
52710	Contractual - Medicare OP	721,483	625,780	496,312	1,843,576
52800	Contractual - Medicaid IP	17,816	16,198	13,049	47,063
52810	Contractual - Medicaid OP	164,880	151,360	121,929	438,169
52900	Contractual - Commercial IP	246,240	230,947	178,524	655,711
52910	Contractual - Commercial OP	242,269	220,597	170,436	633,302
53000	Medicare Cost Report Settlement	21,271	19,523	15,116	55,909
59000	Discount - Prompt Pay	29,192	25,243	20,957	75,392
59010	Discount - Employee	540	501	392	1,432
59200	Small Balance Write Off	1,260	1,134	932	3,326
59300	Administrative Adjustment	45,166	40,251	33,066	118,482
59600	Cash Short or Over	10,760	9,388	7,881	28,029
	Total Cost of Sales	2,092,086	1,862,553	1,477,838	5,432,477



Gross Profit	2,481,916	2,269,463	1,863,385	6,614,763

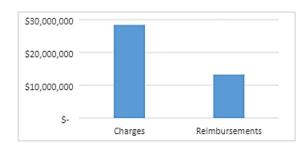


Solver

- EHR data
- Grouping
- Details

Claims Report by Payor - Charges & Reimbursements







Description	Emp#	Employee Name	Charges	R	eimbursements	# of Claims	# of Claims Paid	% Claims Paid
Aetna Group								
	253	Wesley O. Moser	\$ 41,627	\$	20,449	175	53	30%
	256	Nancy O. Hobbs	\$ 421,989	\$	192,770	300	72	24%
	283	Ian I. Nichols	\$ 752,263	\$	346,490	502	70	14%
	335	Jim I. Singleton	\$ 88,959	\$	45,878	318	48	15%
	337	Pauline P. Spivey	\$ 868,835	\$	371,350	1,586	584	37%
		Sub Total by Payor	\$ 2,173,673	\$	976,937	2,880	827	29%
BCBS of Michigan Group								
	299	Geoffrey E. Reed	\$ 218,450	\$	100,000	94	37	40%
	300	Tiffany A. Nash	\$ 130,850	\$	65,000	149	38	25%
	301	Todd I. Wilkerson	\$ 166,100	\$	84,000	281	43	15%
	330	Kimberly R. Gross	\$ 701,300	\$	325,000	351	28	8%
_	331	Jon I. Richmond	\$ 668,700	\$	290,100	2,371	68	3%
		Sub Total by Payor	\$ 1,885,400	\$	864,100	3,246	214	7%
BCBS of NJ Group								
	299	Geoffrey E. Reed	\$ 606,744	\$	263,320	389	50	13%
	300	Tiffany A. Nash	\$ 154,050	\$	70,600	1,497	60	4%
	301	Todd I. Wilkerson	\$ 309,193	\$	149,090	383	104	27%
	330	Kimberly R. Gross	\$ 555,960	\$	247,200	366	37	10%
_	331	Jon I. Richmond	\$ 706,950	\$	359,500	1,377	46	3%
-		Sub Total by Payor	\$ 2,332,897	\$	1,089,710	4,012	297	7%

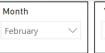


Power BI Dashboards

- Data warehouse
- EHR data

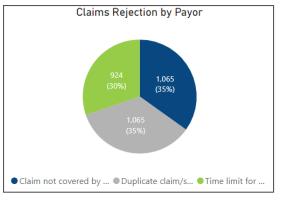


Healthcare - Claims Dashboard



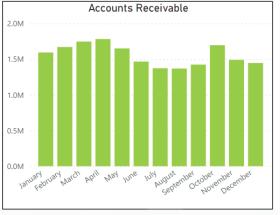


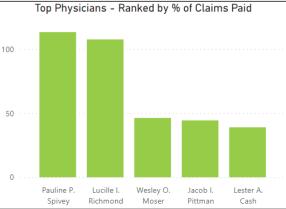
















Planning Ahead



Planning in Solver

- Data warehouse
- Parameter-driven
- Workflow
- Comments/line item detail



Plan Types

- Financial
- Revenue
- Personnel
- Capital
- Expenses





What's Next

Creating Solver Reports Using Groups & Trees

Tuesday, November 28 | 10–11 a.m. ET

forvis.com/events/2023/11/creating-solver-reports-using-groups-trees



Questions?



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Thank you!

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