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Insights & Automation

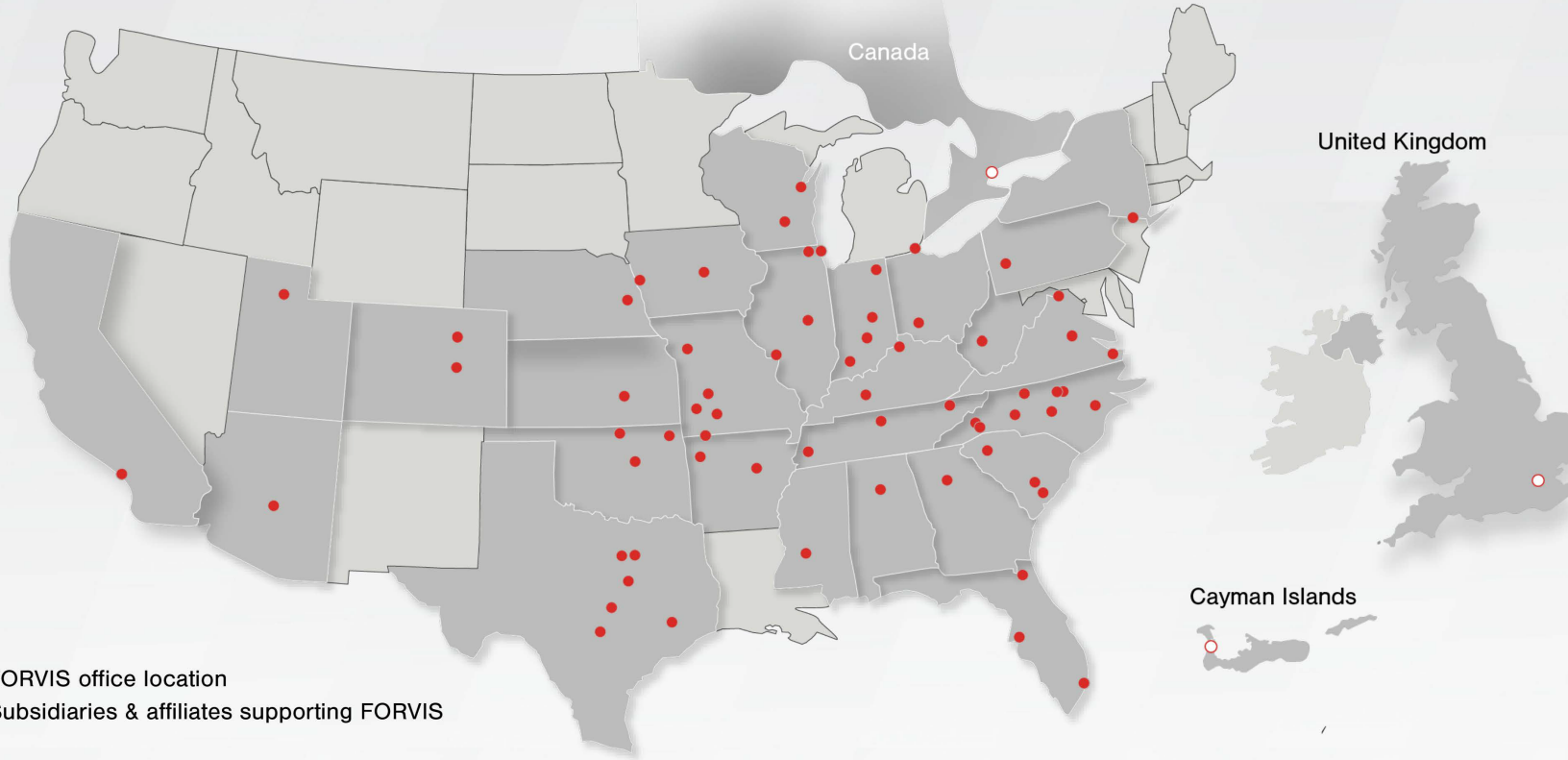
Creating Healthcare Insights With Solver & Power BI

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

Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Canada ULC**
- FORVIS Global Advisory Ltd. UK**
- TALENT SHIFT, LLC

FORVIS

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

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.

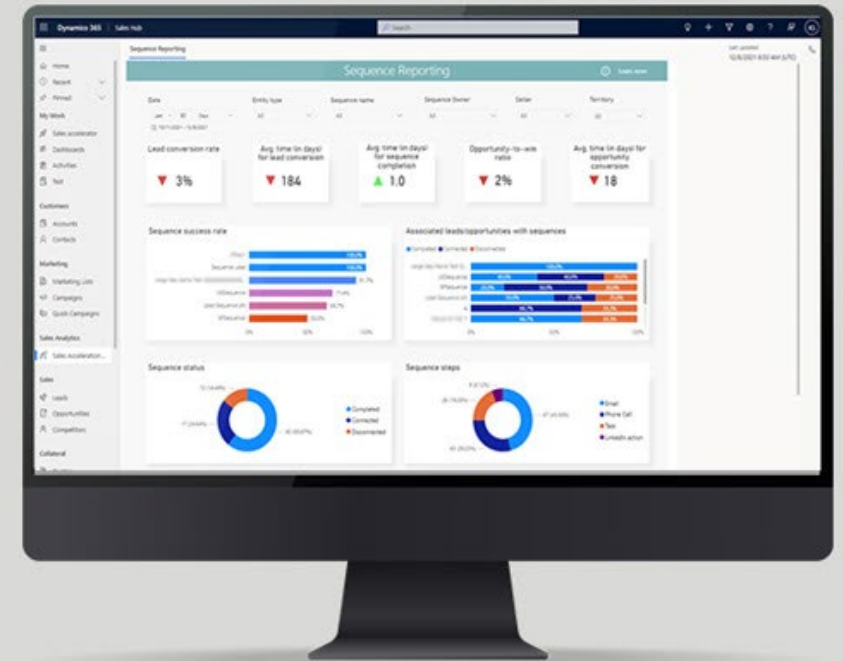
FORVIS

Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



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

Meet the Presenter



Charles Allen
Senior Managing Consultant

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Insights & Automation

Creating Healthcare Insights With Solver & Power BI

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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

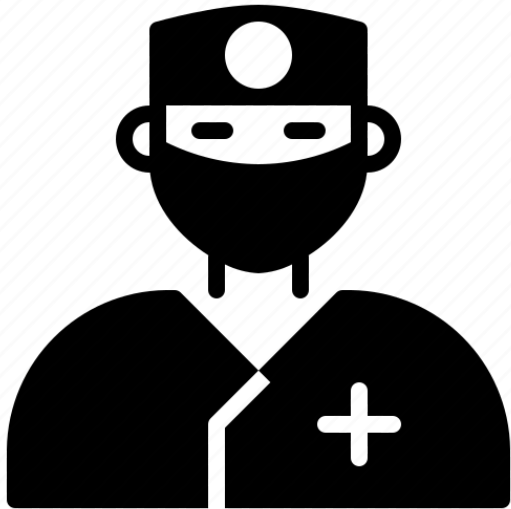
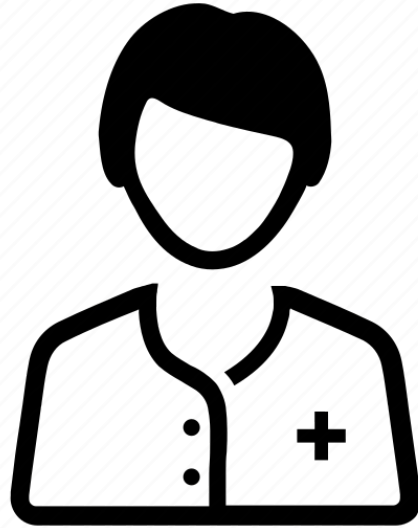
Introduction

FORV/S

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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

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Reporting & Planning Challenges

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

Putting It All Together

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The Data Warehouse

- Single source of truth
- Understandable data

FORVIS

Putting It All Together



CEO

CFO

COO

CMO



KPIs



REPORTING



PLANNING



DASHBOARDS



DATA WAREHOUSE



WEB STATS



PAYROLL



ERP



EHR



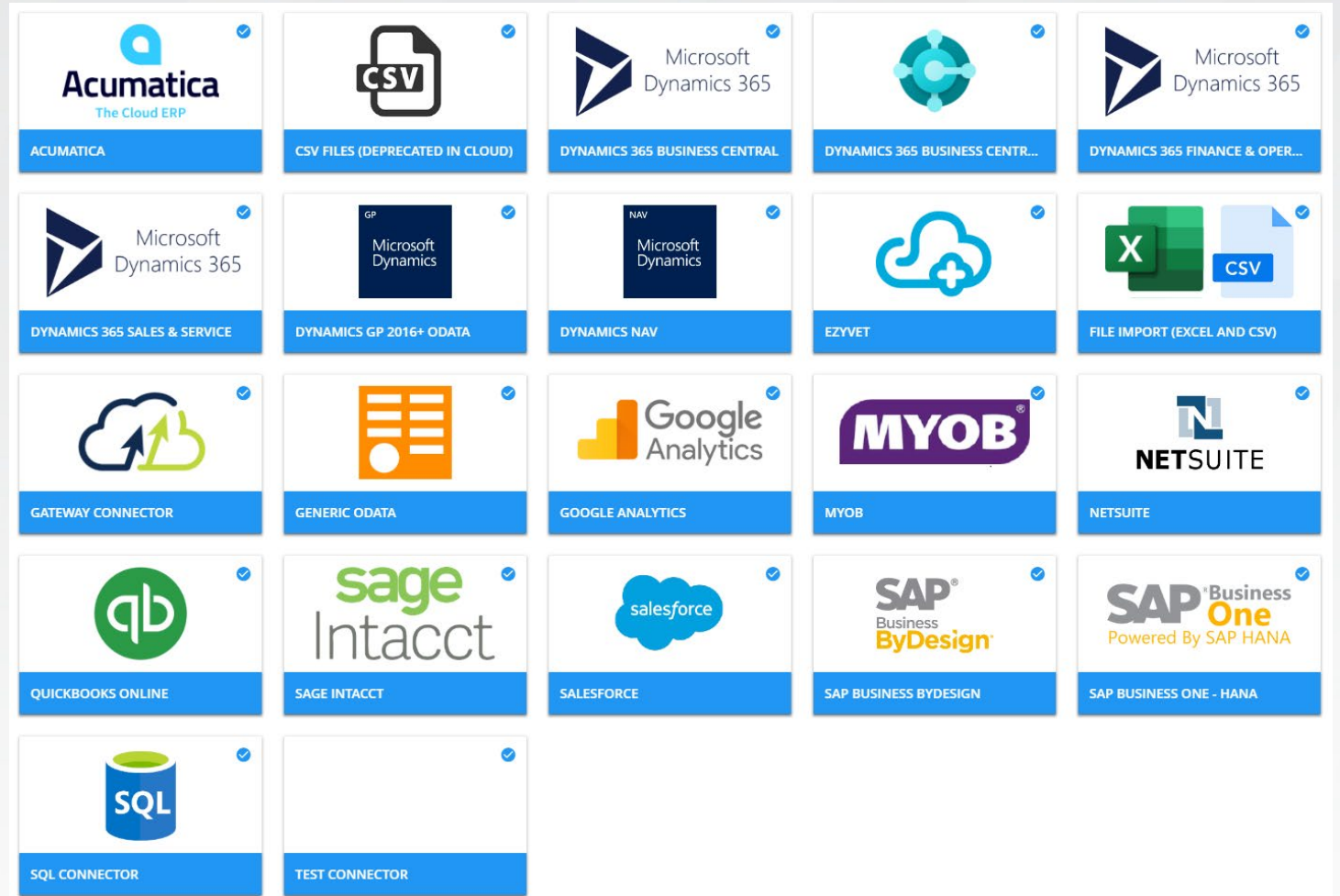
Materials



CLOUD

Pulling in Data

- Prebuilt connectors
- Generic connectors





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Gaining Insights

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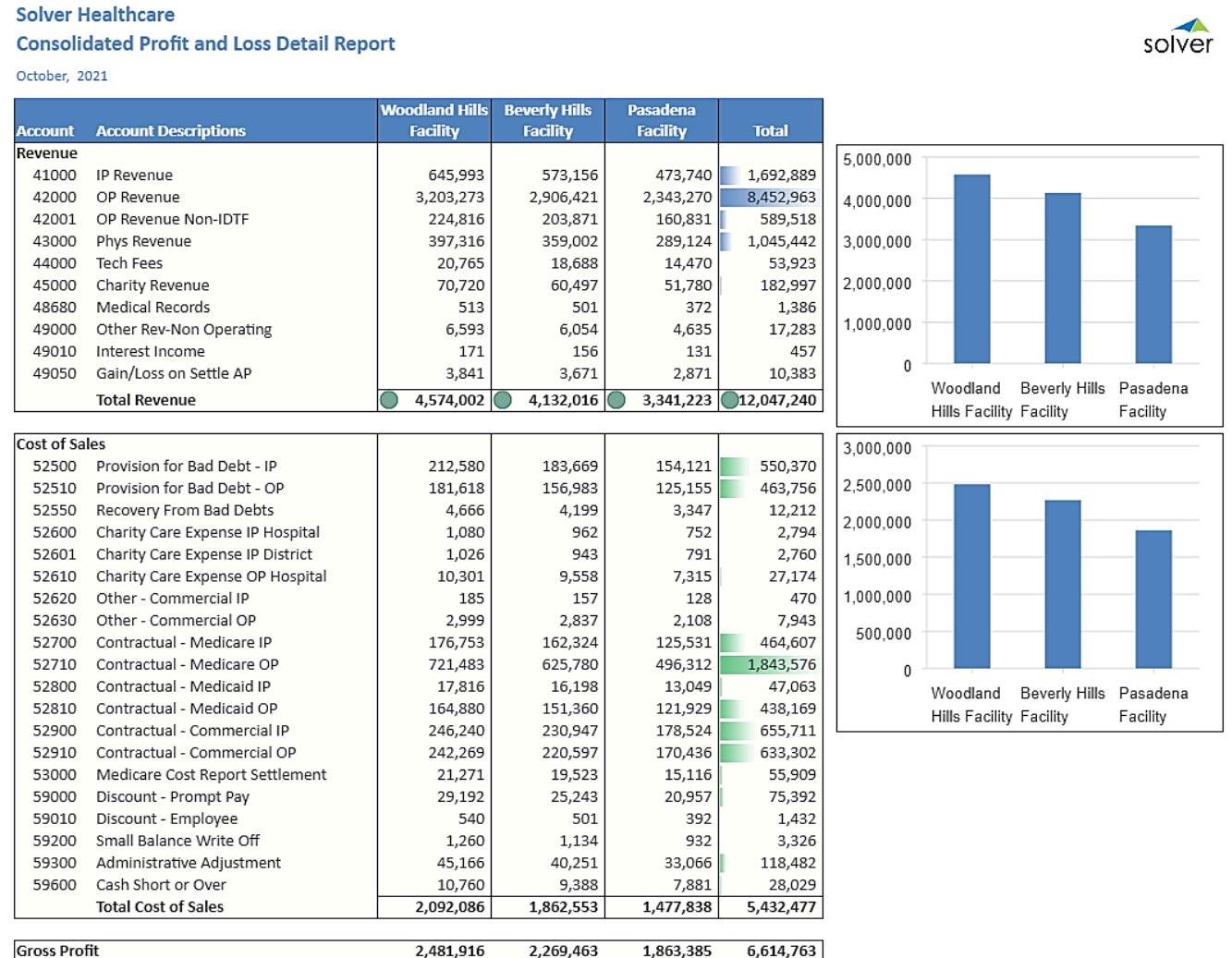
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Solver Reports

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

Solver Reports

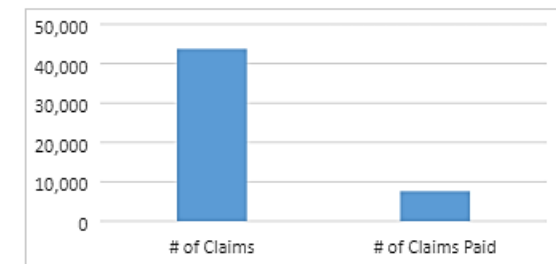
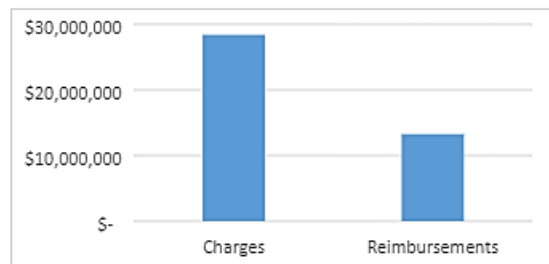
- Financial report
- Multiple clinics
- Drilldown
- Graphics



Solver

- EHR data
- Grouping
- Details

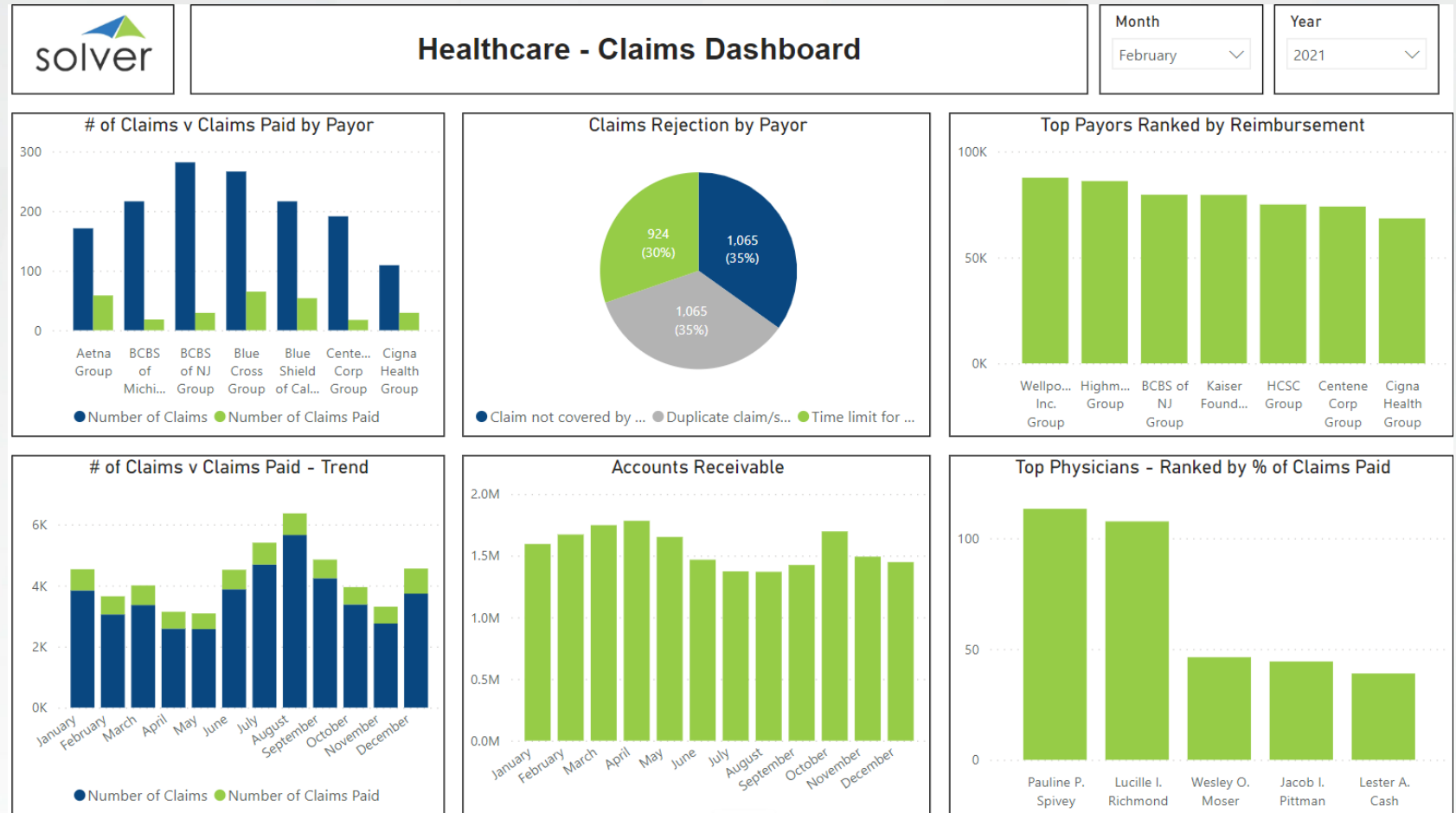
Claims Report by Payor - Charges & Reimbursements



Description	Emp #	Employee Name	Charges	Reimbursements	# 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





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Planning Ahead

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Planning in Solver

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

Plan Types

- Financial
- Revenue
- Personnel
- Capital
- Expenses



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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

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Questions?

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CPE Credit

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Thank you!

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Assurance / Tax / Consulting