



## Healthcare Billing Performance Dashboard and Reporting

### Business Overview

Our client, PTU, is a private, university-affiliated physicians group consisting of approximately 200 doctors and 300 total employees. PTU physicians provide services through 13 clinical departments.

Patient billing is provided in a disjointed fashion through a variety of departmental billing systems and through a national commercial medical billing system. The main billing reporting is slow and can take multiple hours to return data sets that may need to be manipulated manually before being distributed to the user population.

### Business Challenge

PTU is looking to improve visibility to patient billing data through the use of KPI driven dashboards, report bursts, online interactive reporting and the use of ad-hoc reporting and analytics. PTU is also looking to reduce the manual intervention and time laden data retrieval necessary with the current reporting environment.

The current environment does not have a centralized repository for data, nor does it have any analytical reporting. PTU was challenged just to get the basics out of their billing systems.

*"LPA's understanding of our business challenge made possible the significant insights we gained with our data."*

CFO

The BI strategy that PTU adopted was to demonstrate the value of Business Intelligence within the organization against billing data. Subsequent to that PTU would then investigate adding other high interest subject areas to the business intelligence environment (patient data, meaningful use, etc.). The requirements with the highest impact for the lowest investment were selected first so that business value could begin to be realized while additional phases of the project are being developed.

## LPA Business Case Study: Healthcare Billing Performance Dashboard and Reporting

### Solution

LPA met with PTU personnel to understand the complexities of their environment and the priorities of management -- specifically the existing revenue cycle. It was decided to architect a solution that would implement the beginning stages of a data warehouse (focused on revenue cycle reporting) in order to build a foundation that could grow with PTU and provide the framework for future extensions once the billing issues were solved. This stable and reliable foundation would enable consistent, accurate and timely reporting and analytical capabilities.

Due to the busy nature of the environment, PTU decided to start with a small number of key users (PTU administration, billing and finance, clinical department heads and administrators, and early adopter physicians). These "leaders" would prove out the solution and provide the knowledge centers for those physicians who were not as comfortable in the computerized world.

LPA split this effort into two phases. In the first phase LPA gathered requirements, documented the high-level design, drew out a roadmap detailing time and effort to achieve PTU's goals, and then met with management to adjust the recommendations to reflect business priorities.

With this understood and agreed on, LPA implemented the second phase, working with PTU to design the data warehouse using Microsoft's SQL Server 2008, write the data sourcing (ETL) logic using SSIS, install the business intelligence toolsets IBM Cognos 10, design the metadata model, and write the Billing Performance dashboards and reports.

We then provided knowledge transfer to selected staff members and user orientation and training using LPA's instructor-led custom Training courses. Because this training was customized to use the data and terminology of PTU, we could ensure the right level of emphasis was placed on areas of greatest interest and challenge.

### Results

The new solution was an overwhelming success. Administrators got billing performance data in minutes instead of hours...and with no manual intervention. Executives were able to leverage performance reporting on-demand to understand impacts of the operations. And the foundation architecture that LPA built has allowed UTP executives to add more and more KPI tracking to the system.