# **HEALTH INSURANCE REPORT (NPHIES)**

# Tables loaded

1. Claim

It Contains Health insurance claims data along with Nphies Claim ID, Claim reference ID, Claim use, Patient ID,Doctor ID, Insurance company ID, Claim Type, status, Invoice master ID, Claim type Description, Adjudication Outcome, etc.

2. Claim Item

Claim Item details of Result of the Claim processing, indicating approval, denial, or adjustment , Number of units of the service or indemnities Claim Item ID, Nphies Claim ID,, Order ID, Unit Price, Quantity, Gross price, Tax Percentage, Adjudication Outcome, etc

3. Claim Response

Claim Response Contains Nphies Claim Response ID, Nphies Claim ID, Status, Outcome, Adjudication Outcome, etc.

4. Claim Response Item

Claim Response Items full data with Claim Response Nphies Claim Response Item ID, Nphies Claim Response ID, Adjudication Outcome, Tax, Approved Quantity,

5. Core Patients

Contains detailed patient information such as age, gender, citizenship, insurance status, etc.

6. Core Treatment Visits

Includes comprehensive details of visits, including whether they are scheduled or walk-in, consultation name, pediatric or pregnant status, referral status, and eligibility for insurance schemes.

7.HR Departments

Includes comprehensive details of visits, including whether they are scheduled or walk-in, consultation name, pediatric or pregnant status, referral status, and eligibility for insurance schemes.

1. Insurance Providers

Contains information about insurance companies, including company name, insurance provider ID, provider type, address (with phone number), TPA ID, active status, and policy number.

9. Eligibility Request

Provides details of Eligibility Request includes Eligibility Request ID, Treatment Visit ID, Patient ID, Doctor ID, Referred (yes,no), Insurance Company ID, Outcome, Site Eligibility, Patient Name, Date of Birth, Referred (not referred, referred).

10. Insurance TPA (Third party Administrator)

Contains information regarding TPA ID, TPA Name, Account ID, TPA Parent Account ID.

11. Parameter Created

Parameter Creates that Eligibility check, Preauthorization, claims, payment Reconciliation, Parameter fields, Parameter Order

12. Payment Reconciliation

It contains all about payment Nphies Payment Reconciliation ID, Status, Outcome, Payment Amount, Insurance Company ID etc.

1. Payment Reconciliation Item

14. PreAuthorization

Contains information regarding the Nphies Claim ID, Claim Reference ID, Claim use, Treat Visit ID, Patient ID, Doctor ID, Insurance Company ID, Claim Type, Claim Date, Status, Invoice Mater ID, IS Transfer, Claim Type Description , Transferred, Adjudication Outcome, etc.

15.Calendar Table

Created by Calender\_table = CALENDAR(date(2022,1,1),today()+1)

## Transformations Done

Claim

* Retained only essential columns from the table while removing others.
* Claim Type Description If Claim Type equals to 1 -(institutional) Claim Type equals to 2 -(Professional) Claim Type equals to 3 -(Oral) Claim Type equals to 4 - (Pharmacy) Claim Type equals to 5 - (Vision) else Null.
* IsTransferred If Is Transfer equals to TRUE (Transferred) Is Transfer equals to FALSE (Not Transferred) else Not Transferred.
* Custom column Inserted date DateTime.Date([ClaimDate]).

Claim Item

* Retained necessary columns only.
* Retained only essential columns from the table while removing others.

Claim Response

* All the necessary columns are kept
* Removed Blank rows

Claim Response Item

* All the necessary columns are kept
* Retained only essential columns from the table while removing others.

Payment Reconciliation

* Retained all necessary columns
* Custom column Date -- DateTime.Date([PaymentDate])

Payment Reconciliation Item

Eligibility Request

* Retained all necessary columns.
* Retained only essential columns from the table while removing others.
* Referred (yes,no)
* Custom column Date -- DateTime.Date([CreatedDate])
* Referred (not referred, referred).

Core Patients

* Retained all necessary columns
* Full name changed in lowercase letters

Core Treatment Visits

* Retained all necessary columns

Preauthorization

* Retained all necessary columns
* Custom column Date -- DateTime.Date([ClaimDate])
* Claim Type Description If Claim Type equals to 1 -(institutional) Claim Type equals to 2 -(Professional) Claim Type equals to 3 -(Oral) Claim Type equals to 4 - (Pharmacy) Claim Type equals to 5 - (Vision) else Null.
* IsTransferred If Is Transfer equals to TRUE (Transferred) Is Transfer equals to FALSE (Not Transferred) else Not Transferred.
* Filter rows equal to 1.

Insurance TPA (third Party Administrator

* Retained all necessary columns

Insurance Provider

* Retained all necessary columns
* Insurance provider names changed into Lowercase letters

HR Departments

* Retained all necessary columns
* Departments names changed into Lowercase letters

## Data Modelling

1. Claim - Calendar\_table

* Connected Claim with Calendar table by the common column Date using a many-to-one relationship

2.Claim - Insurance provider

* Connected Claim with Insurance provider by the column Insurance company ID & Insurance provider ID using a many-to-one relationship

3.Claim -Core Patients

* Connected Claim with Core Patients by the common column Patient ID using a many-to-one relationship

1. Claim - Core Treatment Visits

* Connected Claim with Core Treatment Visits by the common Treatment Visit ID using a many-to-one relationship

5. Claim Item – Claim

* Connected Claim Item with Claim by the common column Nphies ClaimID using a many-to-one relationship.

6. Claim Item - Claim Response Item

* Connected Claim Item with Claim Response Item by the column fname Nphies Claim Item ID & Nphies Claim Response Item ID using a one-to-one relationship.

1. Core Treatment Visits – HR Departments

- Connected Core Treatment Visits with HR Departments by the common column Department ID using a many-to-one relationship.

8. Eligibility Request – Calendar\_table

* Connected Eligibility Request with Calendar\_table by the common column Date using a many-to-one relationship.

9. Eligibility Request – Insurance Provider

* Connected Eligibility Request with Insurance Provider by the column name Insurance Company ID & Insurance Provider ID using a many-to-one relationship.

10.Eligibility Request - Core Patients

* Connected Eligibility Request with Core Patients by the common column Patient ID using a many-to-one relationship.

11.Eligibility Request - Core Treatment Visits

* Connected Eligibility Request with Core Treatment Visits by the common column Treatment Visit ID using a many-to-one relationship.

12. Insurance Providers – Insurance TPA

* Connected insurance Providers with Insurance TPA by the common column TPA ID using a many-to-one relationship.

13. Payment Reconciliation – Insurance Provider

* Connected Payment Reconciliation with Insurance Provider by the column name Insurance Company ID & Insurance Provider ID using a many-to-one relationship.

14. Payment Reconciliation – Calendar\_table

* Connected Payment Reconciliation with Calendar\_table by the common column Date using a many-to-one relationship.

15. PreAuthorization - Calendar\_table

* Connected PreAuthorization with Calendar\_table by the common column Date using a many-to-one relationship.

16. PreAuthorization - Insurance Provider

* Connected PreAuthorization with Insurance Provider by the column name Insurance Company ID &Insurance Provider ID using a many-to-one relationship.

17. PreAuthorization – Core Patients

* Connected PreAuthorization with Core Patients by the common column Item Patient ID using a many-to-one relationship.

18. PreAuthorization – Core Treatment Visits

* Connected PreAuthorization with Core Treatment Visits by the common column Treatment visit ID using a many-to-one relationship.

## DAX Formulas Used:

|  |  |
| --- | --- |
| No\_of\_Claim\_Requests sent | var result = CALCULATE(COUNTROWS('Claim'))  // Claim use = 2 is Claim Request  // Claim use = 1 is Preauthorization Request  return COALESCE(result,0) |
| Previous Month claim request | // previous Month Claim requests var result = CALCULATE([No\_of\_Claim\_Requests sent],DATEADD('Calender\_table'[Date],-1,MONTH))  RETURN COALESCE(result,0) |
| This month claim Requests | //This month Claim Requests VAR \_thismonth = MONTH(MAX('Calender\_table'[Date]))  RETURN  CALCULATE(      [No\_of\_Claim\_Requests sent],      FILTER(          'Calender\_table',          MONTH('Calender\_table'[Date]) = \_thismonth      )  ) |
| KPI this month Eligibility Requests with % change | //This month Eligibility Requests with Percentage change var a = [This month Eligibility Requests]  var b = DIVIDE([This month Eligibility Requests] - [Previous Month Eligibility Reqeuest],[Previous Month Eligibility Reqeuest])  var c = ROUND(b,2)  RETURN  COALESCE(a & " " & "(" &FORMAT(b, "#,##%") & ")" , 0 ) |
| KPI this month referred patients with % change | //This month referred patients with Percentage change var a = [This month referred patients]  var b = DIVIDE([This month referred patients] - [Previous month referred patients],[Previous month referred patients])  var c = ROUND(b,2)  RETURN  COALESCE(a & " " & "(" &FORMAT(b, "#,##%") & ")" , 0 ) |
| Previous Month Eligibility Reqeuest | var result = CALCULATE([Total\_Eligibility\_Requests\_Sent],DATEADD('Calender\_table'[Date],-1,MONTH))  RETURN COALESCE(result,0) |
| Previous month referred patients | var result = CALCULATE([Total\_Referred\_Patients],DATEADD(Calender\_table[Date],-1,MONTH))  return COALESCE(result,0) |
| This month Eligibility Requests | VAR \_this month = MONTH(MAX('Calender\_table'[Date]))  RETURN  CALCULATE(      [Total\_Eligibility\_Requests\_Sent],      FILTER(          'Calender\_table',          MONTH('Calender\_table'[Date]) = \_this month      )  ) |
| This month referred patients | VAR \_thismonth = MONTH(MAX('Calender\_table'[Date]))  RETURN  CALCULATE(      [Total\_Referred\_Patients],      FILTER(          'Calender\_table',          MONTH('Calender\_table'[Date]) = \_thismonth      )  ) |
| Total\_Eligibility\_Requests\_Sent | var result = COUNT('EligibilityRequest'[EligibilityRequestId])  return COALESCE(result,0) |
| Total\_Referred\_Patients | // IsReferral means patient has been referred to our hospital facility by other hospital or clinic  var result = CALCULATE(COUNTROWS('EligibilityRequest'),'EligibilityRequest'[IsReferral] = True())  return COALESCE(result,0) |
| Total\_Insurance\_Companies | // Number of insurance companies, [InsuranceProviderType] = 2     var result =  CALCULATE(          COUNT('InsuranceProviders'[InsuranceProviderID]),          'InsuranceProviders'[InsuranceProviderType] = 2)      RETURN COALESCE(result,0) |
| Total\_Policy\_Holders | // Number of Policy Holders [InsuranceProviderType] = 3      var result = CALCULATE(          COUNT('InsuranceProviders'[InsuranceProviderID]),          'InsuranceProviders'[InsuranceProviderType] = 3)      return COALESCE(result,0) |
| Total\_TPA | // Number of TPA  var result = COUNT('Insurance TPA'[TPAID])  return COALESCE(result,0) |
| Previous month payments | var result = CALCULATE([Total\_received\_amount], DATEADD(Calender\_table[Date],-1,MONTH))   RETURN COALESCE(result,0) |
| Total\_received\_amount | -- Total payments received  var result = SUM('PaymentReconciliation'[PaymentAmount])  return COALESCE(result,0) |
| KPI this month preauthorization Requests with % change | var a = [This month preauthorization Requests]  var b = DIVIDE([This month preauthorization Requests] - [Previous Month Pre Authorisation Reqeuest],[Previous Month Pre Authorisation Reqeuest])  var c = ROUND(b,2)  RETURN  COALESCE(a & " " & "(" &FORMAT(b, "#,##%") & ")" , 0 ) |
| KPI this month transferred patients with % change | var a = [This month transferred patients]  var b = DIVIDE([This month transferred patients] - [Previous Month Transfers],[Previous Month Transfers])  var c = ROUND(b,2)  RETURN  COALESCE(a & " " & "(" &FORMAT(b, "#,##%") & ")" , 0 ) |
| Pre\_Auth\_requests | var result = COUNTROWS(PreAuthorization) -- Preauthorization requests made  // Claim use = 2 is Claim Request  // Claim use = 1 is Preauthorization Request  return COALESCE(result,0) |
| Previous Month Transfers | -- Patient tranferred to another hospital from our hospital  var result = CALCULATE([Total\_Transferd\_patients],DATEADD('Calender\_table'[Date],-1,MONTH))  RETURN COALESCE(result,0) |
| Previous Month Pre Authorisation Reqeuest | var result = CALCULATE([Pre\_Auth\_requests],DATEADD('Calender\_table'[Date],-1,MONTH))  RETURN COALESCE(result,0) |
| This month preauthorization Requests | VAR \_thismonth = MONTH(MAX('Calender\_table'[Date]))  RETURN  CALCULATE(      [Pre\_Auth\_requests],      FILTER(          'Calender\_table',          MONTH('Calender\_table'[Date]) = \_thismonth      )  ) |
| This month transferred patients | VAR \_thismonth = MONTH(MAX('Calender\_table'[Date]))  RETURN  CALCULATE(      [Total\_Transferd\_patients],      FILTER(          'Calender\_table',          MONTH('Calender\_table'[Date]) = \_thismonth      )  ) |
| Total\_Transferd\_patients | var result =          CALCULATE(              COUNT(PreAuthorization[NphiesClaimID]),              PreAuthorization[IsTransfer] = TRUE()          )      return COALESCE(result,0) |
| temp | var result = CALCULATE(COUNTROWS('EligibilityRequest'), FILTER(Calender\_table, MONTH(Calender\_table[Date]) = 1))  return COALESCE(result, 0) |

## Visualizations:

Overview

Title card: Health Insurance Analytical Insights - Overview

**Text Card Configuration:**

* Select a text card visualization.
* Insert a title with the following settings:
* Font Family: Segoe UI
* Font Size: 18
* Font Colour: Black
* Bold Setting: Enabled

**-** Add a report description below the title with the following settings:

TPA : third party administrator,HIC : health insurance company, HCP : health care provider.

Slicers:

1. **Calendar\_table**

**Table:** calendar\_table, column Year

* -Set the slicer style to "Dropdown."
* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled
* Slicer Height: 64
* Slicer Width: 272

KPI Cards:

**KPI card 1:**

**Third party Administrator (Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 225
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* intermediary between the HIC and the policyholder
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 2:**

**Health Insurance Companies(Tittle)**

* Insert a title with the following settings:
* Height : 146
* Width : 225
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled

- Insert a subtitle with the following settings:

- who provides medical and surgical expenses for an insured person

- Font Family: Segoe UI

* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled

- Callout value

* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 3:**

**Policy holders (Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 225
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* patients who owns an insurance policyFont Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 4:**

**Payment Reconciliation(Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 225
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* Total payment received Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled.

Donut chart:

**Eligibility check :**

* Color code Eligible: #BAD4AA
* Color code not active : #EBF5DF
* Height : 311
* Width : 429
* Legend is enabled

**Detail Labels:**

1. Detail labels Enabled
2. Position outside
3. Label contents: data value, percent of total
4. Font Family: Segoe UI
5. Font Size: 9
6. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle:**
* - number of eligibility check requests submitted by the HCP to the HIC and updates on their status.

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

**Donut chart inside KPI Card:**

**-** Font Family: Segoe UI

- Font Size: 13

- Bold setting: Enabled

- color code : #0E1A77

Stacked bar chart:

**PreAuthorization:**

* On y-axis PreAuthorization outcome from PreAuthorization is selected
* On x-axis pre\_auth\_request are selected and renamed as count
* Height : 312
* Width : 440
* Color code approved: #83C5BE
* Color code pended :#F3E9DC
* Color code Data point :#808080
* Legend is enabled PreAuthorization outcome from PreAuthorization is selected
* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting :Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle:**
* - number requests for payment prior to treatment have been submitted to the HIC for approval and updates on their status**.**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Pie Chart:

**1. Pie Chart Configuration (Claims Pie Chart):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 314

- Width: 439

- Assign the "Adjudication Outcome " column from the dataset as the legend.

- Add the "pre\_auth\_requests" measure to the values field.

- Customize the slice colors as follows: - Approved:#83C5BE

- pended: #F3E9DC

- Data point color :#808080

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966 (Hex Code)

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Stacked bar chart:

Title :

Health Insurance company wise Eligibility check

Health Insurance company wise Preauthorization

Health Insurance company wise Claims

Health Insurance company wise Payment Reconciliation

- Font Family: Segoe UI

- Height : 315

- width : 649

- Font Size: 13

- Font Colour: Black

- Divider: Enabled

- Header icon: Enabled

- Tool Tip: Enabled

- Italic setting: Enabled

- Bold setting: Enabled

- color code :#48CAE4 for bars

- Y axis Insurance Providers from table column insurance provider name

- X axis Field is Parameter

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting :Enabled

New Slicer card

**Field:** parameter

- Height : 315

- Width : 247

- Single selection : Enabled

- Force selection : Enabled

- shape :Rounded rectangle

- Rounded corners :13%

- Callout values

- Font Family : DIN

- Font Size : 12

- color code : #131312

- Text wrap :Enabled

- Border :Enabled

- Fill : Enabled

- Text Background : Enabled

* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled.

Eligibility Report

Title card: Eligibility check

**Text Card Configuration:**

* Select a text card visualization.
* Insert a title with the following settings:
* Font Family: Segoe UI
* Font Size: 18
* Font Colour: Black
* Bold Setting: Enabled

**-** Add a report description below the subtitle with the following settings:

- healthcare providers (hcps) verify beneficiary insurance coverage and benefit plans to determine eligibility for receiving healthcare services at the given facility.

* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: Disabled

Slicers:

1. **Calendar\_table**

**Table:** calendar\_table, column Year

* -Set the slicer style to "Dropdown."
* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled
* Slicer Height: 63
* Slicer Width: 265

KPI Cards:

**KPI card 1:**

**Count of eligibility (Tittle):**

* Insert a title with the following settings:
* Height : 147
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* check requests submitted this year.
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 2:**

**Count of eligibility(Tittle)**

* Insert a title with the following settings:
* Height : 147
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled

- Insert a subtitle with the following settings:

- check requests submitted this month and % change from previous month.

- Font Family: Segoe UI

* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled

- Callout value

* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 3:**

**Number of patients(Tittle):**

* Insert a title with the following settings:
* Height : 147
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* referred to our healthcare facility this year
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 4:**

**Number of patients(Tittle):**

* Insert a title with the following settings:
* Height : 147
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* referred to our healthcare facility this month and % change from previous month.
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled.

Donut Chart:

**1. Donut chart Configuration (Eligibility check):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 311

- Width: 442

- Assign the "site eligibility " column from the dataset as the legend.

- Add the "Total \_Eligibility \_requests\_ sent" measure to the values field.

- Customize the slice colors as follows:

- Eligible : #83C5BE

- not-active : #BAD4AA

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

number of eligibility check requests submitted by the HCP to the HIC and updates on their status.

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Donut chart :

**1. Configuration (Referral status Distribution ):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 311

- Width: 450

- Assign the "referred " column from the dataset as the legend.

- Add the "Total \_Eligibility \_requests\_ sent" measure to the values field.

- Customize the slice colors as follows:

- no : #BAD4AA

- yes :#83C5BE

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

- number of patients referred and not referred distribution to our healthcare facility

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Stacked column chart:

**Eligibility check trend line:**

* On y-axis Total eligibility requests sent from All measures selected
* On x-axis year,month and day are selected from calendar
* Color code (Eligible) : #83C5BE
* Color code (not-active) :#BAD4AA
* Height :311
* Width : 662

- Legend is enabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (drill down and drill up by year | month | day)**

1. Font Family: Segoe UI
2. Font Size: 8

15. Colour code: #6C6966

Stacked bar chart:

**Department:**

* On y-axis Department tittle EN from HR Departments is selected renamed as department
* On x-axis Total\_eligibility\_requests\_sent measure is selected
* Height : 311
* Width : 332
* Color code (Eligible) : #83C5BE
* Color code (not-active) :#BAD4AA
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (number of requests submitted by department and thier status)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked bar chart:

**Insurance company :**

* On y-axis Insurance provider name from Insurance providers is selected renamed as Insurance company
* On x-axis Total\_eligibility\_requests\_sent measure is selected
* Height : 311
* Width : 340
* Color code (Eligible) : #83C5BE
* Color code (not-active) :#BAD4AA
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI

11. Font Size: 9

12. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI

14. Font Size: 13

15. Font Colour: Black

16. Divider: Enabled

17. Header icon: Enabled

18. Tool Tip: Enabled

19. Italic setting: Enabled

20. Bold setting: Enabled

* **Subtitle: (number of requests sent to HIC and thier status)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 64

- Width : 183

**Tittle : departments**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 64

- Width : 183

**Tittle : Insurance companies**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

Table:

- Height : 248

- Width : 1300

**Columns :** Date, Department, Insurance company , Patient name, Eligibility, Referred

**Values** :

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

**Column Headers : Text (Tittle)**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 9

- text Color code : #000000

- Background color :#83C5BE

- Header icon : Enabled

Preauthorization Report :

Title card: Preauthorization

**Text Card Configuration:**

* Select a text card visualization.
* Insert a title with the following settings:
* Font Family: Segoe UI
* Font Size: 18
* Font Colour: Black
* Bold Setting: Enabled

**-** Add a report description below the subtitle with the following settings:

- health care providers (hcp) obtain a prior-approval from the health insurance company (hic) for payment, prior to performing the requested treatment to the beneficiary

* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: Disabled

Slicers:

1. **Calendar\_table**

**Table:** calendar\_table, column date

* -Set the slicer style to "Dropdown."
* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled
* Slicer Height: 63
* Slicer Width: 265

KPI Cards:

**KPI card 1:**

**Preauthorization (this year) (Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* number of requests submitted this year
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 2:**

**Preauthorization (this month) (Tittle)**

* Insert a title with the following settings:
* Height : 146
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled

- Insert a subtitle with the following settings:

- requests submitted this month and % change from previous month

- Font Family: Segoe UI

* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled

- Callout value

* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 3:**

**Transferred (this year) (Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* total transferred patients from our facility to other health care facilities this year
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 4:**

**Transferred (this month) (Tittle):**

* Insert a title with the following settings:
* Height : 146
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* number of transferred patients this month and % change from previous month.
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled.

Donut chart:

**1. Configuration (Preauthorization):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 311

- Width: 442

- Assign the "Adjudication outcome " column from the dataset as the legend.

- Add the "Pre\_auth\_requests" measure to the values field.

- Customize the slice colors as follows:

- Approved : #83C5BE

- Pended : #BAD4AA

- Data point color : #CCCCCC

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

number of preauthorization requests sent to HIC and updates on their status

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Donut Chart:

1. **configuration (Preauthorization requests by healthcare domains):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 311

- Width: 449

- Assign the "Claim type description " column from the dataset as the legend.

- Add the "Pre\_Auth\_requests" measure to the values field.

- Customize the slice colors as follows:

- oral : #B392AC

- professional :#D1B3C4

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

- institutional : inpatient of a clinic or a hospital | professional : outpatient from a physician, physiotherapy,consulting and rehabilitation | oral : denture and hygene | pharmacy : medicine | vision : vision services for professional patients (glasses or contact lenses)

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Stacked column chart:

**Preauthorization requests trend line:**

* On y-axis Total eligibility requests sent from All measures selected
* On x-axis Date hierarchy year,month and day are selected from calendar\_table
* Height : 311
* Width : 902
* Color code (Approved) :#83C5BE
* Color code (Pended) : #BAD4AA
* Data point color : #CCCCCC

- Legend is enabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (drill down and drill up by year | month | day)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked bar chart:

**Department:**

* On y-axis Department tittle EN from HR Departments is selected renamed as department
* On x-axis Pre\_Auth\_requests measure is selected
* Height : 311
* Width : 449
* Color code (Approved) :#83C5BE
* Color code (Pended) : #BAD4AA
* Data point color : #CCCCCC
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (number of requests submitted by department and updates on their status)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked bar chart:

**Insurance companies :**

* On y-axis Insurance provider name from Insurance providers is selected renamed as Insurance company
* On x-axis Pre\_Auth\_requests measure is selected
* Height : 322
* Width : 447
* Color code (Approved) :#83C5BE
* Color code (Pended) : #BAD4AA
* Data point color : #CCCCCC
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

13.Font Family: Segoe UI

14. Font Size: 13

15. Font Colour: Black

16. Divider: Enabled

17. Header icon: Enabled

18. Tool Tip: Enabled

19. Italic setting: Enabled

20. Bold setting: Enabled

* **Subtitle: (number of requests submitted by department and updates on their status)**

21. Font Family: Segoe UI

22.Font Size: 8

23.Colour code: #6C6966

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 55

- Width : 243

**Tittle : departments**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 55

- Width : 242

**Tittle : Insurance companies**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

Table:

- Height : 255

- Width : 902

**Columns :** Date, Patient name, Department, Insurance company , outcome

**Values** :

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

**Column Headers : Text (Tittle)**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 9

- text Color code : #000000

- Background color :#83C5BE

- Header icon : Enabled

Claim Report :

Title card: Claims

**Text Card Configuration:**

* Select a text card visualization.
* Insert a title with the following settings:
* Font Family: Segoe UI
* Font Size: 18
* Font Colour: Black
* Bold Setting: Enabled

**-** Add a report description below the subtitle with the following settings:

- health care providers (HCP) electronically submit the claims for the performed services to the health insurance company (hic) for adjudication with the possibility of single claim submission or batch submission

* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: Disabled

Slicers:

1. **Calendar\_table**

**Table:** calendar\_table, column date

* -Set the slicer style to "Dropdown."
* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled
* Slicer Height: 63
* Slicer Width: 265

KPI Cards:

**KPI card 1:**

**Claims (this year) (Tittle):**

* Insert a title with the following settings:
* Height : 148
* Width : 215
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* number of claims submitted to the health insurance companies this yearFont Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 2:**

**Claims (this month) (Tittle)**

* Insert a title with the following settings:
* Height : 148
* Width : 215
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled

- Insert a subtitle with the following settings:

- claims submitted this month and % change from previous month

- Font Family: Segoe UI

* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled

- Callout value

* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

Stacked column chart:

**Claims submitted trend line:**

* On y-axis No of claim\_requests sent from All measures selected
* On x-axis year,month and day are selected from calendar\_table
* Color code (Approved) :#83C5BE
* Data point color(Blank) : #CCCCCC
* Height :311
* Width : 650

- Legend is enabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (drill down and drill up by year | month | day)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Donut chart:

**Claim Outcome :**

* Color code (blank) : #BAD4AA
* Color code (approved) : #83C5BE
* Height : 312
* Width : 469
* Legend is enabled

**Detail Labels:**

1. Detail labels Enabled
2. Position outside
3. Label contents: data value, percent of total
4. Font Family: Segoe UI
5. Font Size: 9
6. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle:**

-number of patients referred and not referred distribution to our healthcare facility

1. Font Family: Segoe UI

16. Font Size: 8

17. Colour code: #6C6966

Donut chart:

**Claims submitted by healthcare domains :**

* Color code (professional) : #B392AC
* Color code (oral) : #D1B3C4
* Height : 312
* Width : 445
* Legend is enabled

**Detail Labels:**

1. Detail labels Enabled
2. Position outside
3. Label contents: data value, percent of total
4. Font Family: Segoe UI
5. Font Size: 9

6. Bold setting: Enabled

* **Title:**

7.Font Family: Segoe UI

8. Font Size: 13

9. Font Colour: Black

10.. Divider: Enabled

11. Header icon: Enabled

12.. Tool Tip: Enabled

13. Italic setting: Enabled

14. Bold setting: Enabled

* **Subtitle:**

. institutional : inpatient of a clinic or a hospital | professional : outpatient from a physician, physiotherapy,consulting and rehabilitation | oral : denture and hygiene | pharmacy : medicine | vision : vision services for professional patients (glasses or contact lenses)

15. Font Family: Segoe UI

16. Font Size: 8

17. Colour code: #6C6966

Stacked bar chart:

**department :**

* On y-axis Department Tittle EN from HR Departments is selected renamed as department
* On x-axis No of claim requests measure is selected
* Height :312
* Width :445
* Color code (Approved) :#83C5BE
* Data point color(Blank) : #CCCCCC
* Data point color : #CCCCCC
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

13.Font Family: Segoe UI

14. Font Size: 13

15. Font Colour: Black

16. Divider: Enabled

17. Header icon: Enabled

18. Tool Tip: Enabled

19. Italic setting: Enabled

20. Bold setting: Enabled

* **Subtitle: (number of claims submitted by department and updates on their status)**

21. Font Family: Segoe UI

22.Font Size: 8

23.Colour code: #6C6966

Clustered column chart:

**services :**

* On y-axis Department Tittle EN from HR Departments is selected renamed as department
* On x-axis No of claim requests measure is selected renamed is count
* Height :312
* Width :445
* Color code (Approved) :#83C5BE
* Data point color(Blank) : #CCCCCC
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

13.Font Family: Segoe UI

14. Font Size: 13

15. Font Colour: Black

16. Divider: Enabled

17. Header icon: Enabled

18. Tool Tip: Enabled

19. Italic setting: Enabled

20. Bold setting: Enabled

* **Subtitle: (number of claims submitted to HIC by service and updates on their status)**

21. Font Family: Segoe UI

22.Font Size: 8

23.Colour code: #6C6966

Stacked bar chart:

**Insurance company :**

* On y-axis Insurance provider name from Insurance providers is selected renamed as department
* On x-axis No of claim requests measure is selected
* Height :341
* Width :445
* Color code (Approved) :#83C5BE
* Data point color(Blank) : #CCCCCC
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend is enabled**

1. Font Family: Segoe UI
2. Font Size: 9
3. Bold setting: disabled
4. Color code :#6C6966

* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Total Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

13.Font Family: Segoe UI

14. Font Size: 13

15. Font Colour: Black

16. Divider: Enabled

17. Header icon: Enabled

18. Tool Tip: Enabled

19. Italic setting: Enabled

20. Bold setting: Enabled

* **Subtitle: (number of claims submitted to HIC and updates on their status)**

21. Font Family: Segoe UI

22.Font Size: 8

23.Colour code: #6C6966

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 67

- Width : 181

**Tittle : departments**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 9

- Color code : #000000

Slicer card :

**Slicer settings: Enabled**

**-** Options in style :Dropdown

- Selection : Multi selection

- Slicer header : Enabled

- Height : 66

- Width : 181

**Tittle : Insurance companies**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Color code : #000000

- Font Size: 9

- Headers icon :Enabled

**Values**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 9

- Color code : #000000

Table:

- Height : 266

- Width : 896

**Columns :** service, Patient name, Department, Insurance company , amount, status

**Values** :

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 8

- Color code : #000000

**Column Headers : Text (Tittle)**

**-** Font Family : Segoe UI

- Bold setting : Enabled

- Font Size: 9

- text Color code : #000000

- Background color :#83C5BE

- Header icon : Enabled

Payment Reconciliation :

Title card: Payment Reconciliation

**Text Card Configuration:**

* Select a text card visualization.
* Insert a title with the following settings:
* Font Family: Segoe UI
* Font Size: 18
* Font Colour: Black
* Bold Setting: Enabled

**-** Add a report description below the subtitle with the following settings:

- health insurance company sends the payment reconciliation to the health care provider along with the details of the payment amount and the claims related to the payment reconciliation transactions

* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: Disabled

Slicers:

1. **Calendar\_table**

**Table:** calendar\_table, column date

* -Set the slicer style to "Dropdown."
* Configure slicer header with the following settings:
* Font Family: Segoe UI
* Font Size: 9
* Font Colour: Black
* Bold Setting: Enabled
* Slicer Height: 63
* Slicer Width: 265

KPI Cards:

**KPI card 1:**

**payment received (Tittle):**

* Insert a title with the following settings:
* Height : 150
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled
* Insert a subtitle with the following settings:
* total payments received in millions
* Font Family: Segoe UI
* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled
* Callout value
* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

**KPI card 2:**

**Previous month (Tittle)**

* Insert a title with the following settings:
* Height : 150
* Width : 214
* Font Family: Segoe UI
* Font Size: 13
* Font Colour: Black
* Bold Setting: Enabled
* Italic Setting: Enabled

- Insert a subtitle with the following settings:

- previous month received payments in millions

- Font Family: Segoe UI

* Font Size: 8
* Font Colour: Black
* Bold Setting: disabled
* Italic Setting: Disabled

- Callout value

* Font Family: DIN
* Font Size: 25
* Bold Setting: disabled
* Italic Setting: Disabled

Stacked bar chart:

**Yearly revenue receipt :**

* On y-axis year from Calendar\_table is selected renamed as department
* On x-axis payment amount from sum of Payment Reconciliation renamed amount Received
* Height :316
* Width :367
* Color code :#83C5BE
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend :**Disabled
* **Data Labels:**

1. Data labels : Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (payment received each year )**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Pie Chart:

**1. Pie Chart Configuration (quarterly revenue receipt):**

- Add a pie chart visualization to the report.

- Set the size of the visual to the following dimensions:

- Height: 316

- Width: 367

- Assign the "quarter in calendar table " column from the dataset as the legend.

- Add the "Payment Amount “ from Payment Reconciliation to the values field.

- Customize the slice colors as follows:

- Q4 : #83C5BE

- Turn on the legend and set its position to "Top Center."

- Turn on detail labels and set their position to "Outside."

- Set label contents to "Data Value" and "Percent of Total."

- Configure the font for labels to:

- Font Family: Segoe UI

- Font Size: 9

- Turn on title and subtitle for the chart.

- Set the title font to:

- Font Family: Segoe UI

- Font Size: 13

- Font Color: Black

- Bold and Italic Setting: Enabled

- Turn on text wrapping for the title.

- Set the subtitle font to:

- payment received each quarter

- Font Family: Segoe UI

- Font Size: 8

- Font Color: #6C6966 (Hex Code)

- Turn on the divider.

- Turn on the background for the chart and set it to white.

Stacked column chart:

**monthly revenue receipt**

* On y-axis Add the "Payment Amount “ from Payment Reconciliation to the values field.
* On x-axis month are selected from calendar\_table
* Height : 316
* Width : 370
* Color code :#83C5BE

- Legend is disabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (payment received each month)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked bar chart:

**payment received by each insurance company :**

* On y-axis Insurance provider name from Insurance providers is selected renamed as Insurance company
* On x-axis payment amount from sum of Payment Reconciliation renamed Amount
* Height :311
* Width :443
* Color code :#83C5BE
* Title for x-axis and y-axis is disabled
* Y-axis & X-axis values are enabled
* **Legend :**Disabled
* **Data Labels:**

1. Data labels : Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (payments received from each insurance company )**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked column chart:

**Weekly revenue receipt**

* On y-axis Add the "Payment Amount “ from Payment Reconciliation to the values field.
* On x-axis week number are selected from calendar\_table
* Height : 310
* Width : 444
* Color code :#83C5BE

- Legend is disabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (payment received each week)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966

Stacked column chart:

**daily revenue receipt**

* On y-axis Add the "Payment Amount “ from Payment Reconciliation to the values field.
* On x-axis day are selected from calendar\_table
* Height : 311
* Width : 447
* Color code :#83C5BE

- Legend is disabled

* Title for x-axis and y-axis is disabled
* **Data Labels:**

1. Data labels Enabled
2. Font Family: Segoe UI
3. Font Size: 9
4. Bold setting: Enabled

* **Title:**

1. Font Family: Segoe UI
2. Font Size: 13
3. Font Colour: Black
4. Divider: Enabled
5. Header icon: Enabled
6. Tool Tip: Enabled
7. Italic setting: Enabled
8. Bold setting: Enabled

* **Subtitle: (payment received each week)**

1. Font Family: Segoe UI
2. Font Size: 8
3. Colour code: #6C6966