**Clinical Director Meeting Notes**

**Topic:** Patient Retention and Care Insights Dashboard  
**Date:** [Insert Date]  
**Attendees:**

* Dr. Jennifer MacLeod, Clinical Director (Chair)
* Mr. Simon Fraser, Medical Practice Manager
* Mr. Damion Wilson, BI Analyst / Data Analyst
* Mr. Liam O’Connor, IT & Data Systems Lead
* Ms. Sophie Tremblay, Nursing Supervisor
* Ms. Amina Farah, Patient Experience Coordinator
* Mr. Derek Chen, Finance Officer

**1. Meeting Objective**

To align on how the new patient visit dataset will be analyzed and visualized to improve **patient retention**, **service quality**, and **resource allocation** across the practice.

**2. Key Points Discussed**

**A. Data Overview**

* The dataset captures information on **patient demographics**, **visit details**, **charges**, **insurance**, **departments**, **length of stay**, **specialist consultations**, and **survey responses**.
* Data from **Hospital A** and **Hospital B** will be combined for comparative analysis.
* Each record represents a **single patient visit**.

**B. Analytical Goals**

1. **Patient Retention & Frequency**
   * Determine how often patients return (within 1 year and 5 years).
   * Identify which groups have higher retention (by age, condition, or department).
   * Compare retention among patients who see specialists vs. those who only attend general consultations.
2. **Operational Efficiency**
   * Analyze **average length of stay** and **time between visits** per patient.
   * Highlight departments or conditions with unusually long stays or gaps in follow-up.
   * Identify trends that may indicate inefficiencies or delays in care delivery.
3. **Financial Insights**
   * Review **mean and median visit charges** by hospital, department, and condition.
   * Compare charges for specialist vs. general visits.
   * Assess the **impact of insurance coverage** on billing and patient satisfaction.
4. **Patient Experience**
   * Evaluate **survey completion rates** and **satisfaction scores**.
   * Determine if patients who complete surveys have higher or lower retention.
   * Examine patterns (e.g., dissatisfaction in specific departments or conditions).

**3. Directives and Responsibilities**

| **Department** | **Responsibility** | **Expected Outcome** |
| --- | --- | --- |
| **BI Analyst / Data Analyst** | Develop interactive Power BI dashboard using the recommended data model (FactVisits + Dim tables). | Dashboard with visuals for retention, charges, satisfaction, and survey metrics. |
| **Clinical Director & Nursing Supervisor** | Define key **clinical metrics** (e.g., target follow-up intervals, ideal stay length). | Reference benchmarks to help interpret analytics results. |
| **Patient Experience Coordinator** | Audit and improve survey response processes. Ensure that surveys are consistently distributed and recorded. | Higher survey completion rate and better data quality. |
| **Finance Officer** | Validate accuracy of visit charge data. Identify outliers and verify insurance claim records. | Clean, verified billing data for analysis. |
| **IT & Data Systems Lead** | Ensure the dataset is properly maintained, updated monthly, and securely shared with the analytics team. | Reliable and compliant data pipeline. |
| **Practice Manager** | Coordinate feedback meetings after dashboard implementation. Set monthly review cadence. | Continuous improvement cycle established. |

**4. Key Deliverables and Timeline**

| **Deliverable** | **Owner** | **Due Date** |
| --- | --- | --- |
| Clean, updated dataset | IT Lead & Finance Officer | [Insert Date +1 week] |
| Initial Power BI dashboard draft | BI Analyst | [Insert Date +2 weeks] |
| Review meeting with leadership | Clinical Director | [Insert Date +3 weeks] |
| Final dashboard + summary report | BI Analyst & Clinical Director | [Insert Date +4 weeks] |

**5. Next Steps**

* BI Analyst to circulate mock-up of the Power BI dashboard layout.
* Data cleaning and validation to begin immediately.
* Schedule follow-up review in two weeks to evaluate early insights and visualizations.
* Begin documentation for long-term data governance and version control.

**6. Closing Remarks**

The clinical leadership emphasized that this project should not only provide numbers but also **actionable insights**.  
The end goal is to:

* Improve **patient follow-up rates**
* Reduce **unnecessary readmissions**
* Enhance **care quality through data-driven decisions**