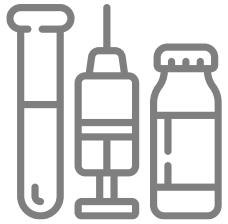


BI Infrastructure Implementation

Medical Equipment Company

- Tracked monthly revenues generated and identified account receivable trends through automated dashboards on Tableau
- Built Billing Denial dashboard on Tableau to track Denials % by billing period and by various dimensions such as business regions, payors, and branches
- Built multiple automated Quality Check dashboards to ensure accuracy of data

© 2024 Accordion CONFIDENTIAL

BI reporting and quality management for a medical equipment company

BI Infrastructure Implementation

Situation

- Client was expanding inorganically by acquiring companies and by scaling up the operations. To provide visibility through this phase, it required support to augment the BI Reporting/Analytics capabilities for various functions such as RCM, Accounting, Operations, etc.
- Partnered with the client to design and build the BI Reporting Suite on Tableau, for RCM, Accounting, and Operations, and developed automated critical Tableau dashboards. Also, we provided data & quality management services to ensure high accuracy of data.

Accordion Value Add

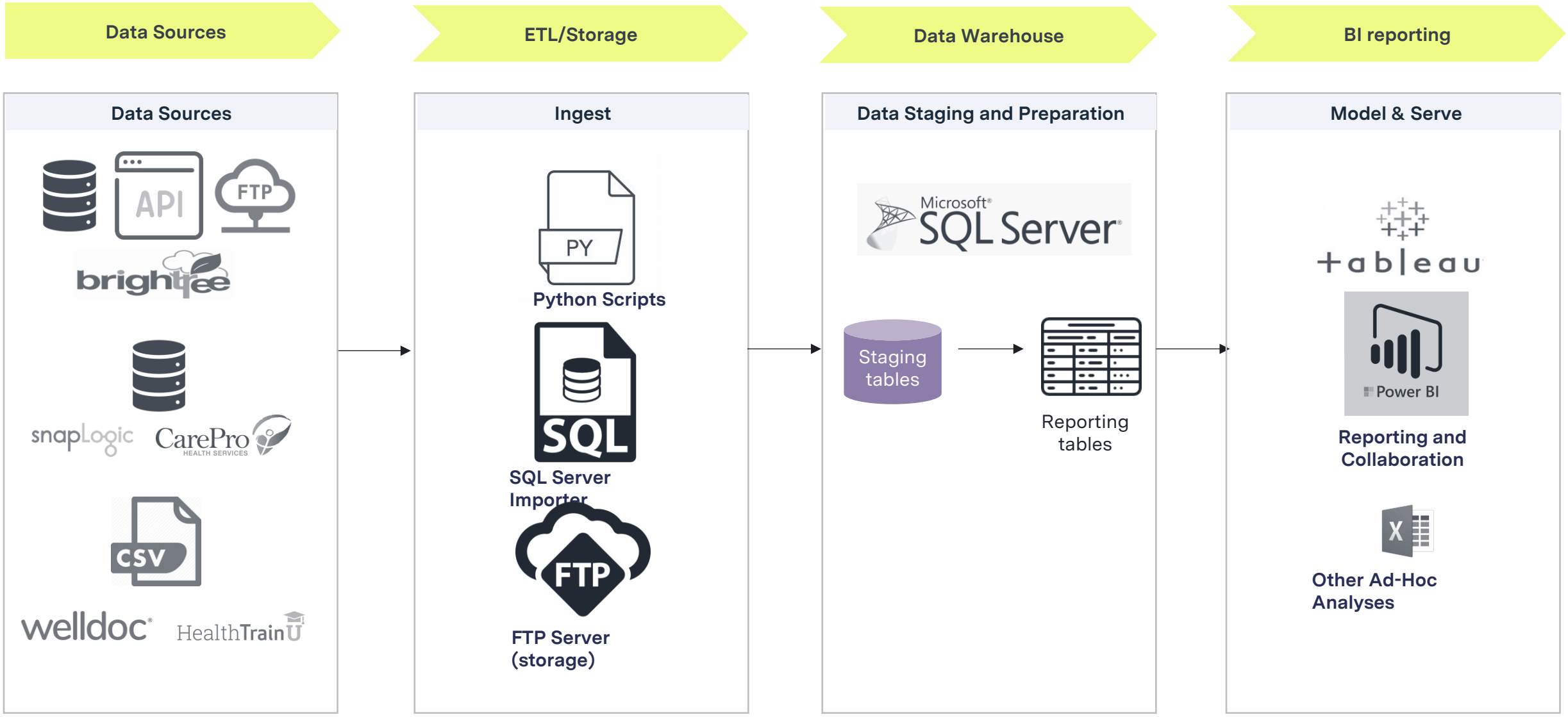
- Consolidated data across 20 business units using custom-built SSIS models and built automated self-service financial dashboards on Tableau to track Accounts Receivable (by age, region, entity etc.) and monthly revenues by product categories and regions
- Developed automated Billing Denial report by consolidating Invoice and Payments data from various business units to show denials % across businesses and identified Top-10 denial reasons
- Developed multiple automated Tableau Dashboards to monitor SQL jobs refresh time, Tableau Data Source Extracts refresh consistency and accuracy of data shown in production dashboards

Impact

- AR Aging report enabled better tracking of balance amounts over time, and identify high risk patients/insurance
- Billing Denial Dashboard helped identify regions and payors with high Denial rates and address the denial reasons. This also helped extract a worklist for open denials and share with respective clearing houses for further processing.
- SQL Status Summary Dashboard and Critical Dashboard Summary Dashboards helped in proactively identifying and debugging the failures in the SQL server or in Tableau environment. These automated dashboards reduced manual effort to monitor the production environments and keep the dashboards stable.

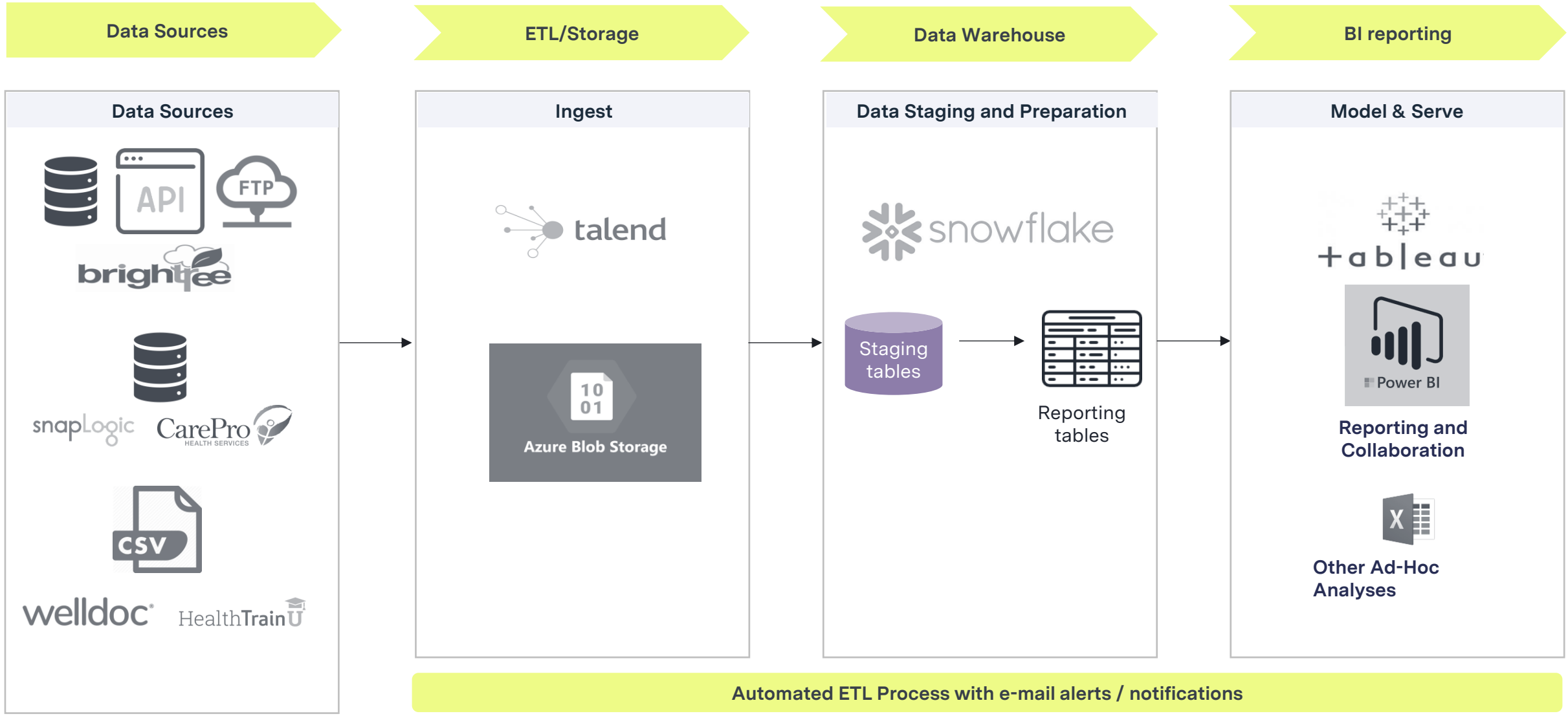
© 2024 Accordion CONFIDENTIAL

BI infrastructure (old – on prem DW)



© 2024 Accordion CONFIDENTIAL

BI infrastructure (new – transitioned from traditional DW to cloud)



© 2024 Accordion CONFIDENTIAL

FP&A reporting

Accounts Receivable by age and payer type
Helps identify AR Aging for different types of Payers including Patients and Insurance agencies

Account Receivable Trends

EOM Date | Region: Region1 | Nick Name: (All)

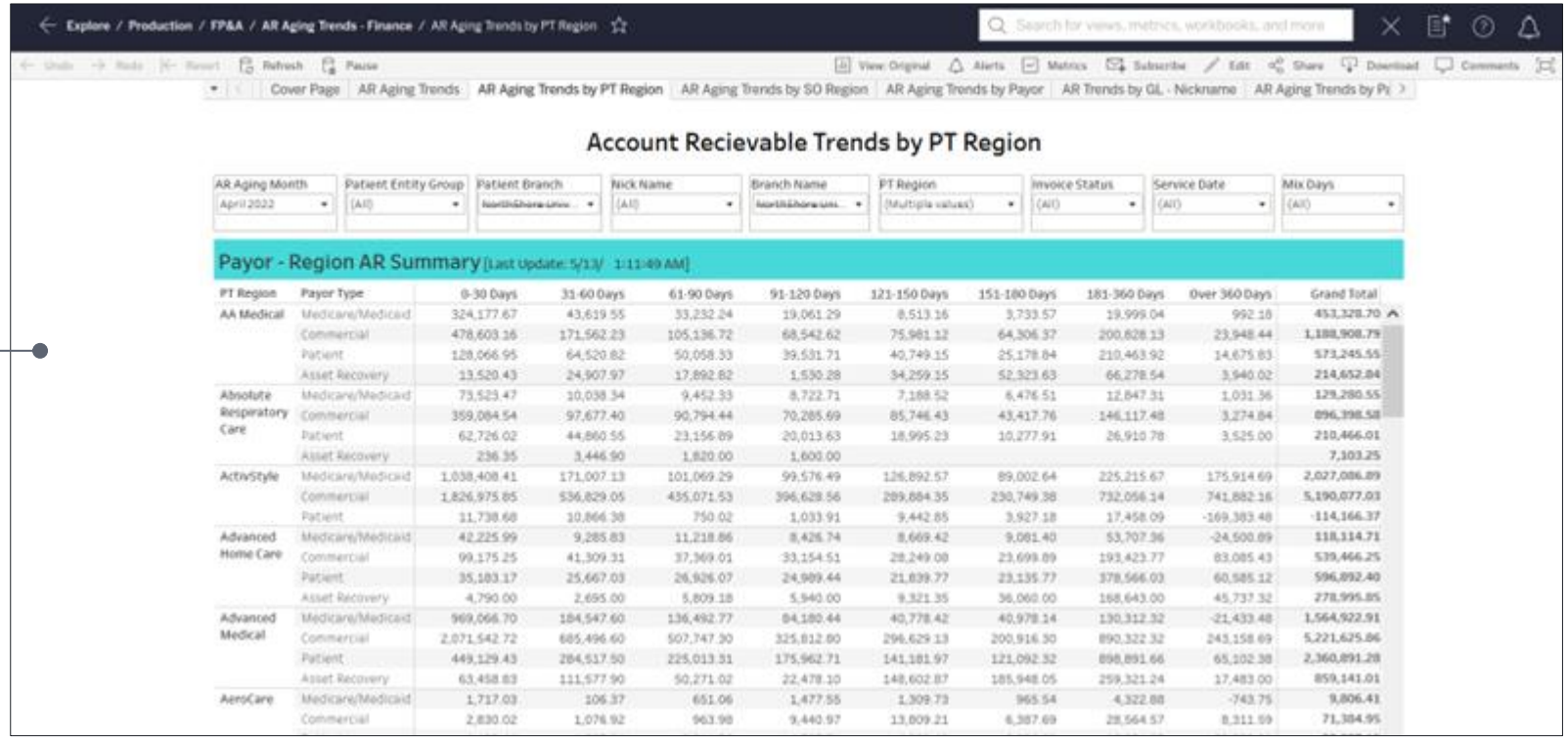
Last GL month available:

AR Balance as of :

AR Aging data

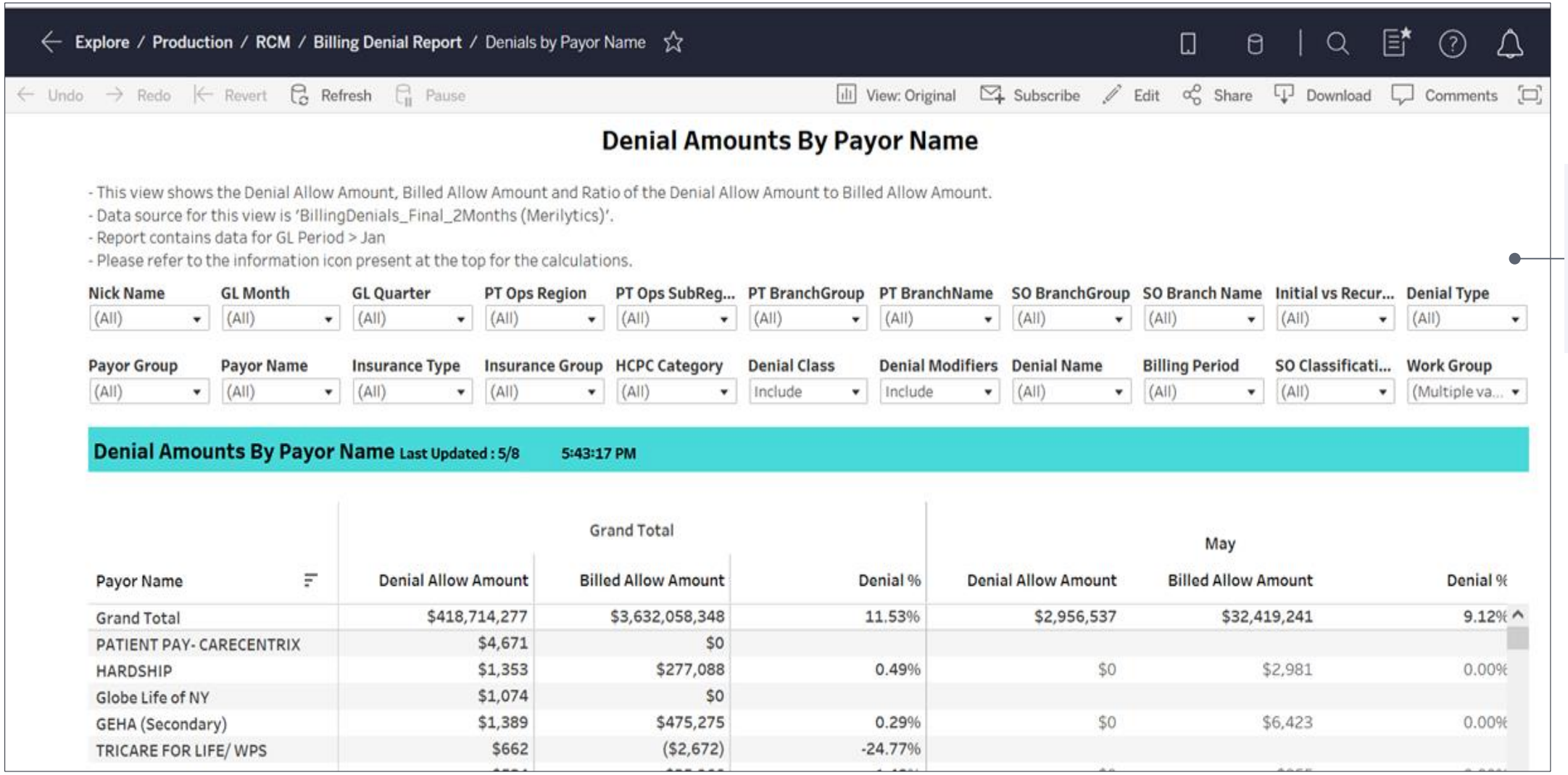
Payer	Current	31-60 Days	61-90 Days	91-120 Days	121-150 Days	151-180 Days	181-360 Days	>360 Days	Grand Total
Non-Patient Pay	$9,096,626	$1,710,674	$1,262,156	$1,038,480	$1,009,295	$747,660	$2,308,623	$362,018	$17,535,533
Patient Pay	$2,198,231	$1,396,885	$866,005	$602,497	$599,193	$488,841	$2,296,760	$2,278,306	$10,726,718
Patient Pay - Asset Recovery	$65,873	$136,795	$110,160	$165,396	$89,602	$72,555	$521,612	$570,067	$1,732,060
Grand Total	$11,360,730	$3,244,354	$2,238,321	$1,806,373	$1,698,090	$1,309,056	$5,126,995	$3,210,392	$29,994,311

Accounts Receivable by Patient regions
Helps identify the AR Aging for different Patient regions



© 2024 Accordion CONFIDENTIAL

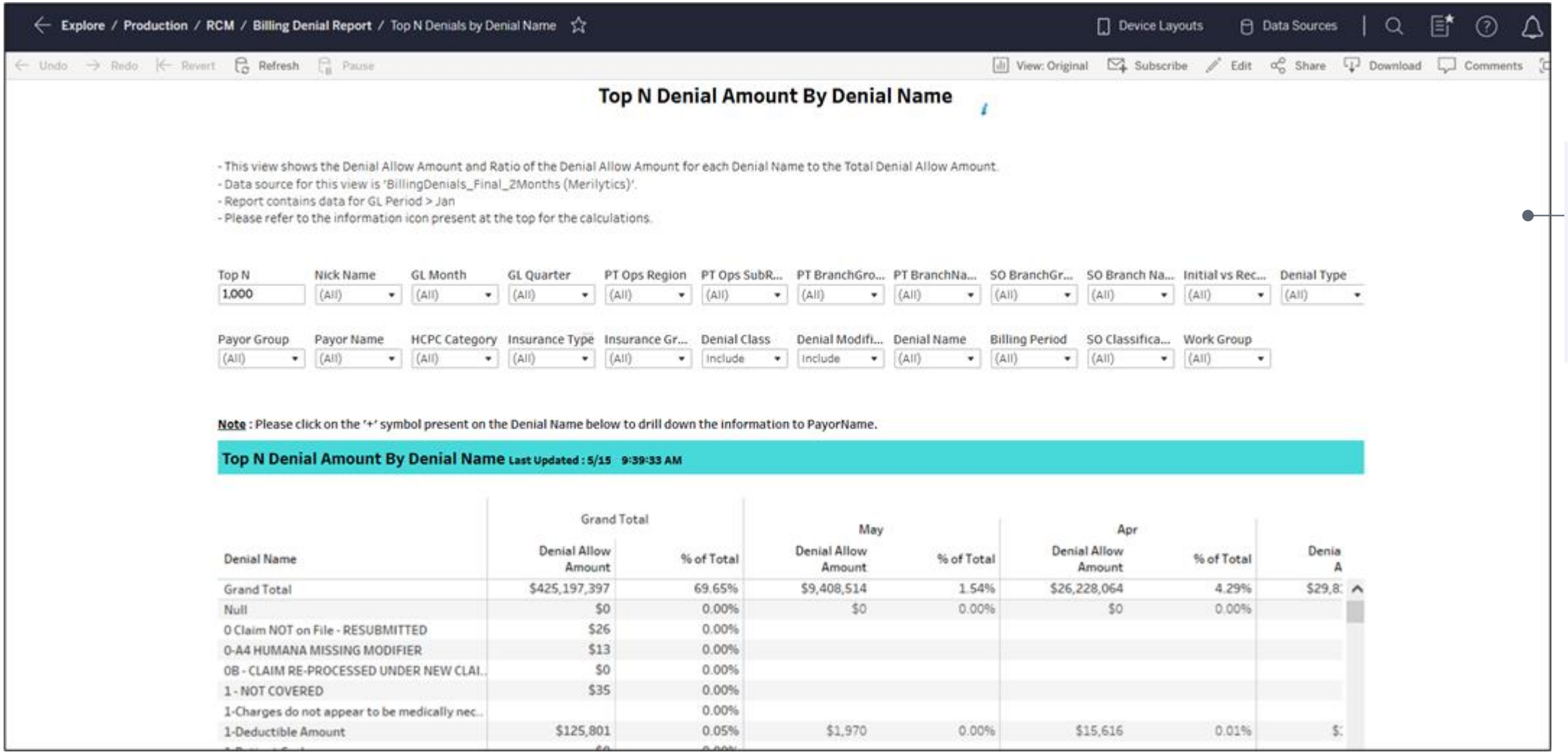
RCM reporting (1/2)



Billing Denial Dashboard shows overall Denial % for the client across business operation regions and payors

© 2024 Accordion CONFIDENTIAL

RCM reporting (2/2)

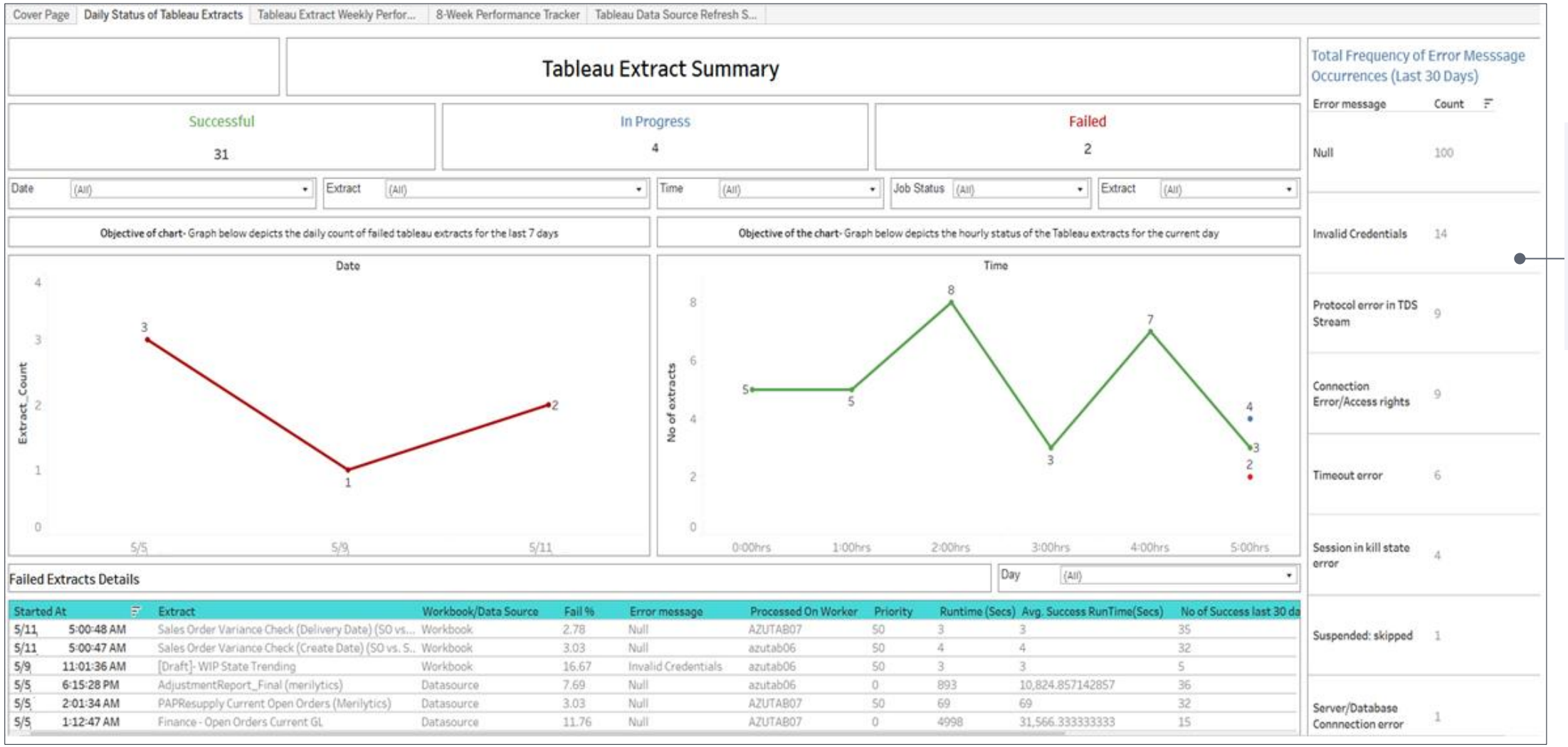


Billing Denial Dashboard helps the client to identify top denial reasons by denial % for different business units and payors

© 2024 Accordion CONFIDENTIAL

ILLUSTRATIVE

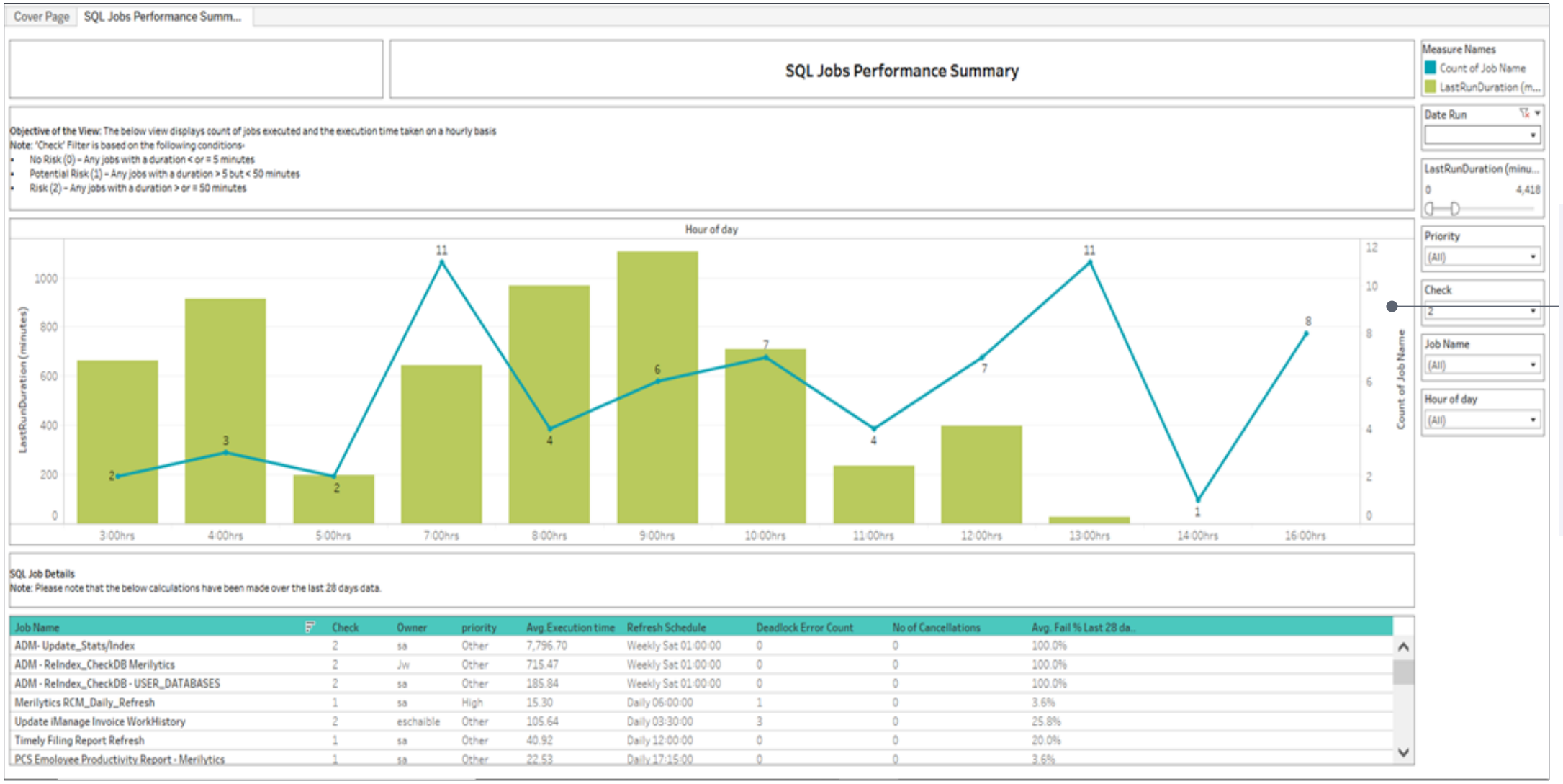
Data management & quality reporting



This dashboard gives overview on overall health of the Tableau infrastructure of the client. It also identifies long running tableau extracts and any high priority failures

© 2024 Accordion CONFIDENTIAL

Data & quality management reporting



The dashboard shows the overall health of SQL server of the client. It identifies long running SQL jobs and proactively helps to identify and fix the critical failures in any given day

© 2024 Accordion CONFIDENTIAL