# SCHNEIDER DOWNS
## Big Thinking. Personal Focus.

AUTOMATION AND DATA ANALYTIC PROCESS TEAM SUCCESS STORY

# DATA ANALYTIC REPORTING TOOL FOR
## PRIMARY CARE PHYSICIAN NETWORK

The company approached us to help revamp their reporting function, allowing management more time to analyze data and less time compiling reports and manual analysis in traditional spreadsheets. As a foundation for this engagement, the project team had a series of meetings with management and gained a clear understanding of the sources of data, structure of the data tables and availability of the data. Through these co-planning sessions, the project team identified three key sources: (1) cloud based practice management and billing system, (2) cloud based payroll system and (3) cloud based general ledger accounting system.



To facilitate the reporting and data visualization needs based on the client's budget and the amount of data needed to be processed, we determined integration directly to an interactive dashboard tool was the best solution. We developed a series of dashboard reports that monitored productivity of each physician on a weekly basis - this being the most frequent time period that data was entered consistently, completely and reliably. Now, management is able to identify physicians that are not meeting expectations in terms of number of patients seen. Management can also see what type of visits each physician completed in any given period. This allows management to coach their physicians on proper treatments and billing practices to improve patient care.

We also designed a series of dashboard reports providing additional analysis on the profitability of each physician, service location and type of visit. This was a Key Performance Indicator that management did not previously have the ability to calculate reliably. Not only did management become more efficient with their analysis by implementing these automatically calculated analytics, but they also became more effective by having insights that were previously not available to them.

By management's estimation, the automated nature of these tools **saved approximately five hours on a weekly basis** and several additional hours during monthly and quarterly reporting. This gave management time to focus on high value tasks as opposed to compiling analysis manually.

### About Schneider Downs Technology Advisors
Our consultants combine practical business experience with up-to-date technical options to implement cost-effective solutions for our clients. Our association with industry-leading technology companies provides our clients with the latest industry-specific, low-risk and proven solutions. Through vendor certification programs, advanced education and industry conferences, our consultants are trained and certified on the latest products and services. Our consultants bring a variety of experiences, technical knowledge and industry certifications to our clients, providing an ongoing and effective partnership.

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