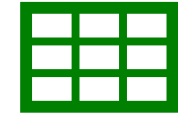


Reports for Analysts – Some Best Practices



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310-500-5841
www.theprototyper.design

Making a report for an analyst



When making reports for another analyst, remember that it is always about the numbers. Sometime a report full of filterable tables and matrices is all you need.

But still – let’s bring them something more than a filterable grid of numbers – while still including the numbers.

In the following pages you’ll see instances of an anonymized report page I built, followed by an annotated version of that page showing Best Practices.

Note that the pages are built in Power BI, but the Best Practices therein can be applied to multiple data visualization platforms.

Logo Here

Intro page

Month Ending 11/30/2024

Market

Lorem

Ipsum

NCAL

SCAL

NW

HI

MAS

CO

GA

WA

HB

PB

Capitated Coverage

Non-Capitated KP Coverage

Non-KP Coverage

No Coverage

\$560M

Lorem

\$1.9bn

Ipsum

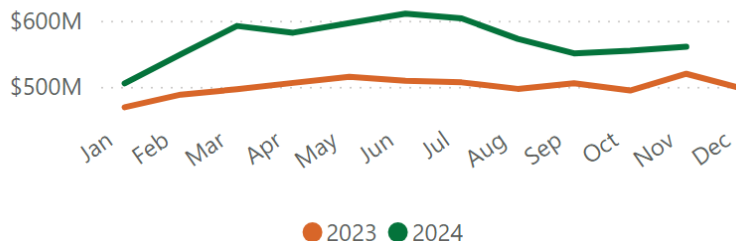
\$1.0bn

Sit

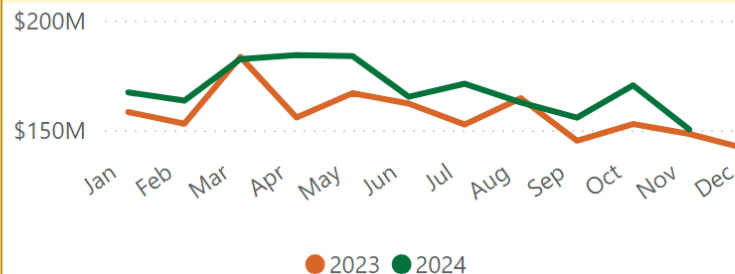
\$390M

Dolor

Lorem



Ipsum



Monthly and Yearly - At a Glance

November 2024

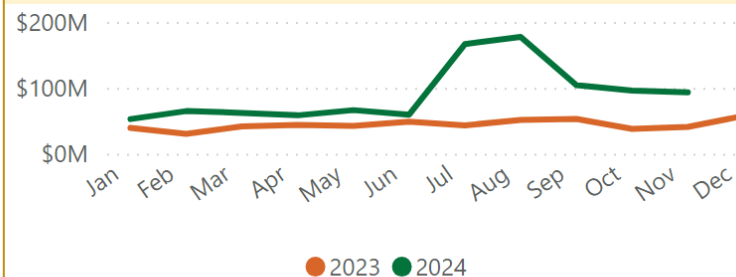
Calculation Table

Comparison	Lorem	Ipsum
Current	\$560,358,922	\$150,388,138
Prior Month	\$554,369,789	\$170,444,473
Current Month to Prior Month	1.08%	-11.77%
YTD	\$560,358,922	\$1,856,541,525
PYTD	\$519,557,297	\$1,742,656,953
YTD to PYTD	7.85%	6.54%
PY End	\$497,187,714	\$1,884,274,509
YTD to PY End	12.71%	-1.47%

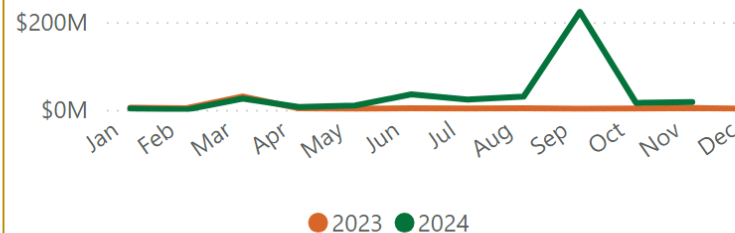
Calculation Table

Comparison	Sit	Dolor
Current	\$93,374,164	\$17,863,188
Prior Month	\$96,003,711	\$15,554,639
Current Month to Prior Month	-2.74%	14.84%
YTD	\$1,001,087,538	\$389,940,668
PYTD	\$472,073,579	\$62,992,316
YTD to PYTD	112.06%	519.03%
PY End	\$529,539,301	\$65,335,465
YTD to PY End	89.05%	496.83%

Sit



Dolor



Logo Here

Intro page

Month Ending 11/30/2024

Market

Lorem

Ipsum

NCAL SCAL NW HI MAS CO GA WA

HB PB

Capitated Coverage Non-Capitated KP Coverage Non-KP Coverage No Coverage

Intro page Annotated

\$560M

Lorem

\$1.9bn

Ipsum

\$1.0bn

Sit

\$390M

Dolor

Monthly and Yearly - At a Glance

November 2024

Calculation Table

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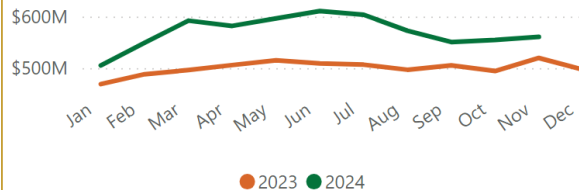
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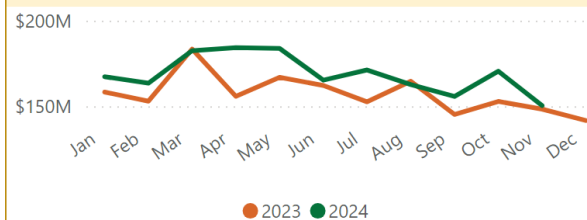
Cards on top can get the analyst thinking in broad terms.

Calculation Tables are a great feature of Power BI – they calculate a series of time-dependent data based on the Current Month – or Week, or Day, or anything you want if you set it up. In many reports they become oversized (and often slow performing) tables, but you can cut them down like you see here.

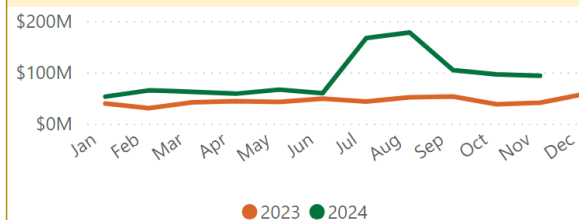
Lorem



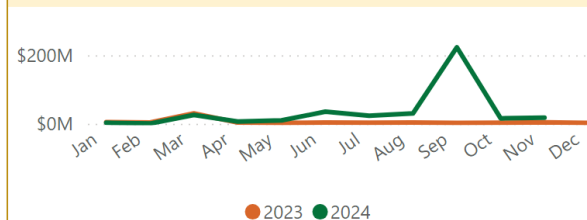
Ipsum



Sit



Dolor



We have thematic colors here, and then break the color pattern for the line charts – it brings a bit of visibility and distinctness through clashing colors.

Market

NCAL	SCAL	NW	HI	MAS	CO	GA	WA
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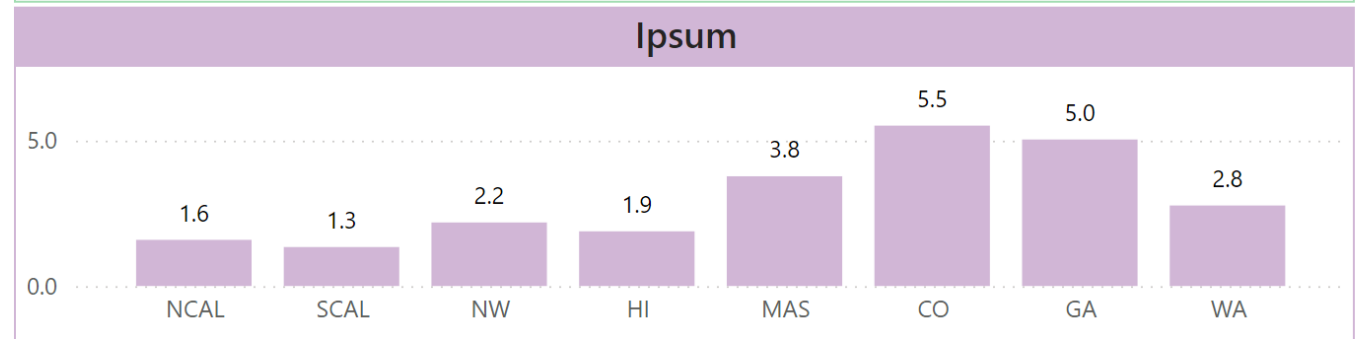
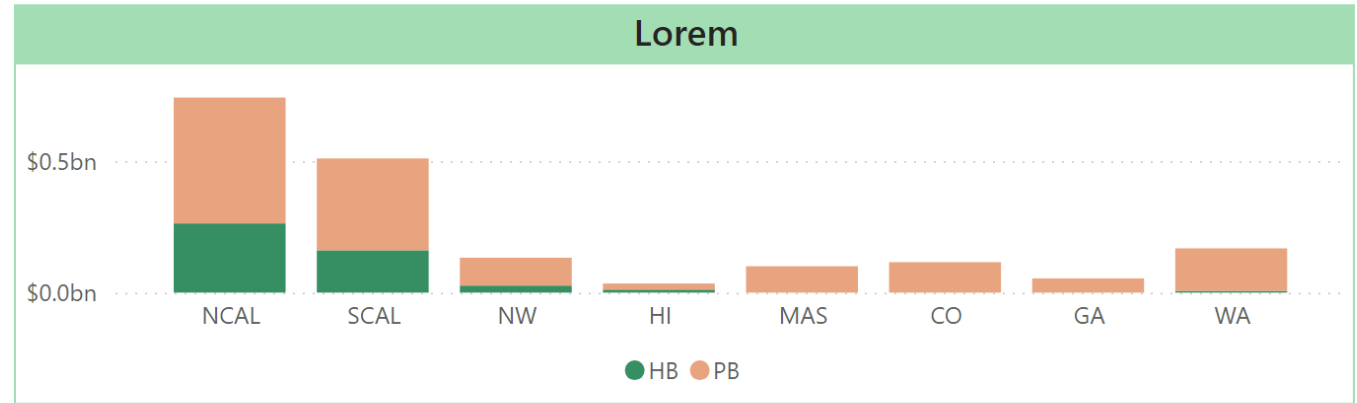
Lorem

HB	PB
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Ipsum

Capitated Coverage	Non-Capitated KP Coverage	Non-KP Coverage	No Coverage
--------------------	---------------------------	-----------------	-------------

Billing System	NCAL	SCAL	NW	HI	MAS	CO	GA	WA	Total
HB									
Lorem	26.2	31.7	30.4	23.2				34.4	28.0
Ipsum %	61.4%	65.1%	60.2%	54.2%				45.2%	62.4%
Sit %	31.9%	30.3%	53.4%	48.5%				75.1%	33.6%
Dolor %	30.1%	28.8%	52.0%	47.5%				73.4%	31.9%
PB									
Lorem	33.6	29.4	26.0	32.1	33.4	25.9	31.6	33.4	31.1
Ipsum %	48.8%	50.9%	48.3%	44.3%	50.2%	59.2%	51.9%	41.9%	50.1%
Sit %	29.7%	36.6%	45.7%	38.6%	52.2%	58.2%	52.9%	45.1%	39.5%
Dolor %	28.4%	35.4%	44.9%	38.3%	51.6%	57.6%	52.5%	43.8%	38.4%



Lorem
Ipsum

	NCAL	SCAL	NW	MAS	CO	GA	Total
Lorem	118	142	102	104	65	93	108
Ipsum	5,344	4,506	1,007	901	631	857	13,246
Sit	4,200	3,815	1,033	916	826	1,147	11,937

Calc Group Table

Forecast (Monthly) Calc Items	NCAL	SCAL	NW	HI	MAS	CO	GA	WA	Total
Current	\$835,561	\$1,178,531	\$100,487	\$129,126	\$408,780	\$57,330	\$7,682	\$36,861	\$2,754,358
YTD	\$15,731,377	\$9,821,265	\$1,211,116	\$1,056,498	\$3,552,523	\$217,016	\$256,206	\$467,394	\$32,313,394
Current Year Annualized	\$17,161,502	\$10,714,107	\$1,321,217	\$1,152,544	\$3,875,479	\$236,745	\$279,498	\$509,884	\$35,250,976
PY End	\$23,036,836	\$17,667,826	\$1,429,147	\$2,072,359	\$4,546,169	\$446,356	\$228,673	\$1,003,887	\$50,431,253
Current Year Annualized / PY End	74.50%	60.64%	92.45%	55.62%	85.25%	53.04%	122.23%	50.79%	69.90%

Market

NCAL	SCAL	NW	HI	MAS	CO	GA	WA
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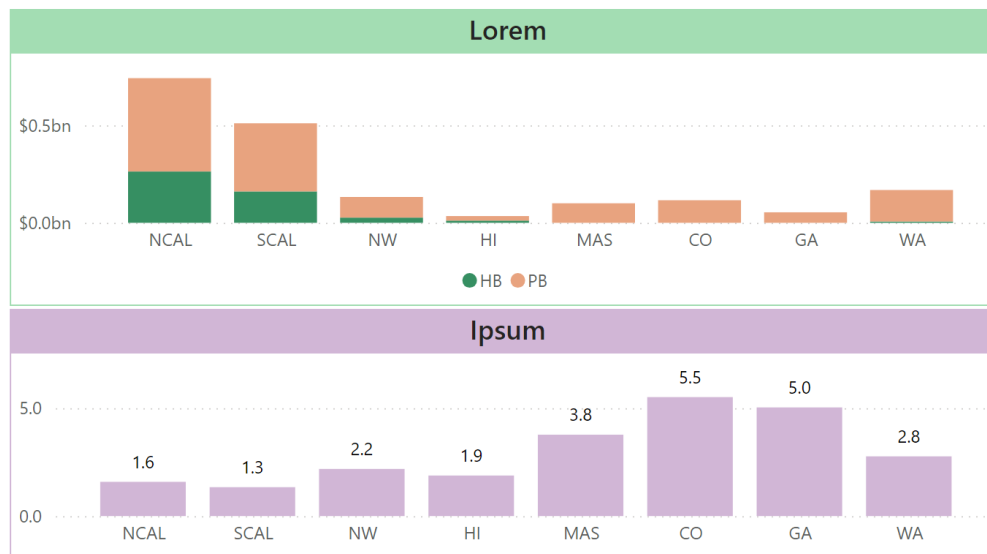
Lorem

HB	PB
----	----

Ipsum

Capitated Coverage	Non-Capitated KP Coverage	Non-KP Coverage	No Coverage
--------------------	---------------------------	-----------------	-------------

Billing System	NCAL	SCAL	NW	HI	MAS	CO	GA	WA	Total
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Lorem	26.2	31.7	30.4	23.2				34.4	28.0
Ipsum %	61.4%	65.1%	60.2%	54.2%				45.2%	62.4%
Sit %	31.9%	30.3%	53.4%	48.5%				75.1%	33.6%
Dolor %	30.1%	28.8%	52.0%	47.5%				73.4%	31.9%
PB									
Lorem	33.6	29.4	26.0	32.1	33.4	25.9	31.6	33.4	31.1
Ipsum %	48.8%	50.9%	48.3%	44.3%	50.2%	59.2%	51.9%	41.9%	50.1%
Sit %	29.7%	36.6%	45.7%	38.6%	52.2%	58.2%	52.9%	45.1%	39.5%
Dolor %	28.4%	35.4%	44.9%	38.3%	51.6%	57.6%	52.5%	43.8%	38.4%



Lorem Ipsum

	NCAL	SCAL	NW	MAS	CO	GA	Total
Lorem	118	142	102	104	65	93	108
Ipsum	5,344	4,506	1,007	901	631	857	13,246
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Current Year Annualized	\$17,161,502	\$10,714,107	\$1,321,217	\$1,152,544	\$3,875,479	\$236,745	\$279,498	\$509,884	\$35,250,976
PY End	\$23,036,836	\$17,667,826	\$1,429,147	\$2,072,359	\$4,546,169	\$446,356	\$228,673	\$1,003,887	\$50,431,253
Current Year Annualized / PY End	74.50%	60.64%	92.45%	55.62%	85.25%	53.04%	122.23%	50.79%	69.90%

Comparisons page Annotated

Add as much numeric detail as you can without overloading the analyst.

Calculation tables like this can perform slowly, but once loaded they provide a lot of detail.

Add a bit of conditional formatting to tables if you can, but only if the analyst wants it. Also consider what they are looking for – some want to see only the bad things, some want to see the opportunity in high performers. Some want a bit of both. Some want shading, some want arrows.

Logo Here

Monthly Anonymized Inquiries

Month Ending 11/30/2024

Market

NCAL SCAL NW HI MAS CO GA WA

Lorem

HB PB

Ipsum

Capitated Coverage Non-Capitated KP Coverage Non-KP Coverage No Coverage

Lorem Ipsum

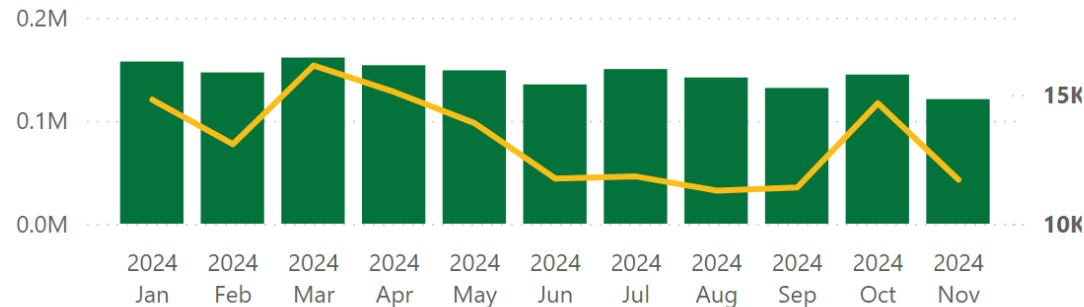
YTD Average	Month	Member	Non-Member	True Self Pay/Uninsured
Non-Member	2023 Nov	38.2	99.9	67.9
107.7	2023 Dec	30.3	98.1	59.3
True Self Pay/Uninsured	2024 Jan	28.5	97.0	59.4
92.8	2024 Feb	35.4	99.4	69.7
Member	2024 Mar	31.1	114.5	74.5
29.3	2024 Apr	28.5	127.6	89.5
	2024 May	27.4	112.9	94.3
PY Average	2024 Jun	28.3	104.1	125.8
Non-Member	2024 Jul	28.3	106.9	114.4
87.7	2024 Aug	27.2	104.2	104.5
True Self Pay/Uninsured	2024 Sep	28.8	105.9	94.7
56.4	2024 Oct	27.6	106.4	105.4
Member	2024 Nov	30.0	112.3	96.5
29.7				

Sit Dolor

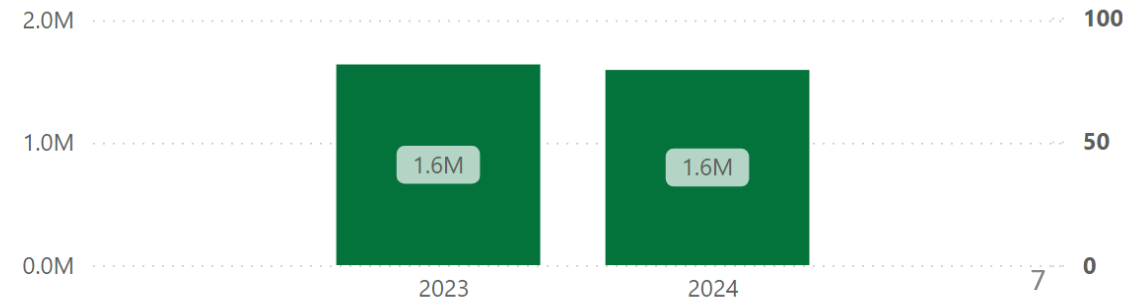
YTD Average	Month	Member	Non-Member	True Self Pay/Uninsured
Non-Member	2023 Nov	60.0	64.4	82.5
106.1	2023 Dec	76.2	100.0	110.2
True Self Pay/Uninsured	2024 Jan	69.7	85.3	86.2
98.2	2024 Feb	66.7	90.7	83.0
Member	2024 Mar	56.3	81.4	69.2
81.4	2024 Apr	68.8	102.1	85.6
	2024 May	67.4	103.0	85.3
PY Average	2024 Jun	70.4	90.9	91.6
True Self Pay/Uninsured	2024 Jul	101.3	104.8	112.9
76.0	2024 Aug	109.7	130.6	130.6
Non-Member	2024 Sep	98.2	115.1	115.1
61.2	2024 Oct	86.5	125.2	93.3
Member	2024 Nov	88.6	122.5	100.5
53.9				

Note: PB-RX and PB-Dental are excluded in Cycle Time metrics above.

Lorem - YTD by Month



Ipsum - YoY comparison



Logo Here

Monthly Anonymized Inquiries

Month Ending 11/30/2024

Market

NCAL	SCAL	NW	HI	MAS	CO	GA	WA
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Lorem

HB	PB
----	----

Ipsum

Capitated Coverage	Non-Capitated KP Coverage	Non-KP Coverage	No Coverage
--------------------	---------------------------	-----------------	-------------

Lorem Ipsum

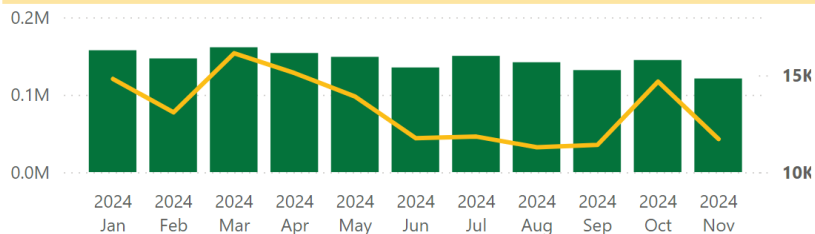
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87.7	2024 Jul	28.3	106.9	114.4
True Self Pay/Uninsured	2024 Aug	27.2	104.2	104.5
56.4	2024 Sep	28.8	105.9	94.7
Member	2024 Oct	27.6	106.4	105.4
29.7	2024 Nov	30.0	112.3	96.5

Sit Dolor

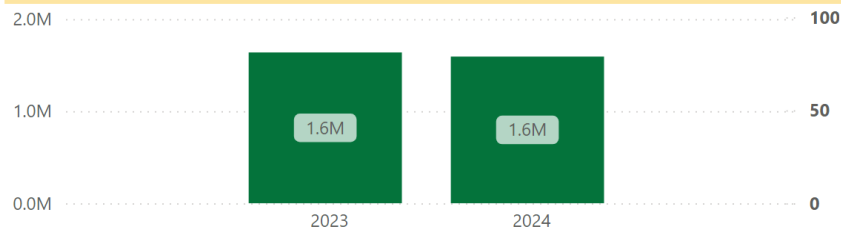
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True Self Pay/Uninsured	2024 Jun	70.4	90.9	91.6
76.0	2024 Jul	101.3	104.8	112.9
Non-Member	2024 Aug	109.7	130.6	130.6
61.2	2024 Sep	98.2	115.1	115.1
Member	2024 Oct	86.5	125.2	93.3
53.9	2024 Nov	88.6	122.5	100.5

Note: PB-RX and PB-Dental are excluded in Cycle Time metrics above.

Lorem - YTD by Month



Ipsum - YoY comparison



Numbers page Annotated

Sometimes the data is displayed best as numbers. Still, make it interesting if you can – add a few multi row Cards to supplement the table, and be sure to thematically group all content, or at least separate it with a line.

If there is space for a visualization or two, make sure it either says something the table can not, and/or fits in with the theme. These tables are a bit of both – they show YTD trends, and YoY trends, but you can see the trends a bit better than in a table.

Market

NCAL	SCAL	NW	HI	MAS	CO	GA	WA
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Lorem

HB	PB
----	----

Ipsum

Capitated Coverage	Non-Capitated KP Coverage	Non-KP Coverage	No Coverage
--------------------	---------------------------	-----------------	-------------

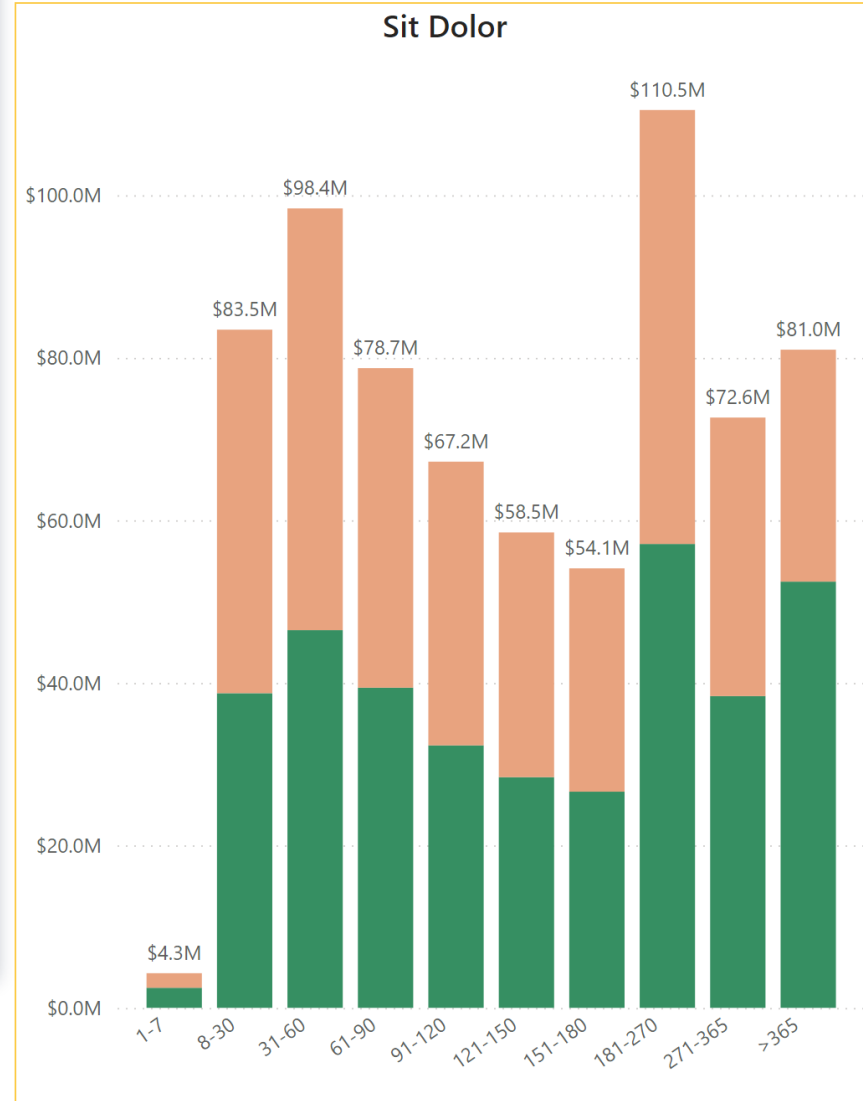
Lorem Ipsum

Click on a line to influence chart on the right -->

Lorem Subcategory	Current	Current Month - Prior Month	YTD to PYTD	YTD - PYTD
<input type="checkbox"/> Billed Patient	\$560,356,251	\$5,990,757	7.85%	\$40,800,085
1-7	\$556,715	\$54,616	295.62%	\$415,995
8-30	\$31,806,528	(\$1,204,377)	0.05%	\$14,790
31-60	\$67,325,569	\$1,594,039	-2.86%	(\$1,982,309)
61-90	\$60,034,241	(\$1,506,977)	-5.48%	(\$3,477,820)
91-120	\$57,384,516	(\$97,866)	-7.47%	(\$4,629,547)
121-150	\$52,498,319	(\$1,844,213)	-3.35%	(\$1,819,278)
151-180	\$49,484,942	\$1,148,952	5.65%	\$2,647,614
181-270	\$100,389,166	(\$2,229,922)	9.19%	\$8,450,975
271-365	\$64,449,562	\$7,592,467	29.99%	\$14,870,518
>365	\$76,426,693	\$2,484,038	52.49%	\$26,309,148
<input type="checkbox"/> Unbilled Patient	\$148,378,572	(\$62,381,660)	13.77%	\$17,961,536
1-7	\$3,703,954	(\$58,764,595)	-15.31%	(\$669,700)
8-30	\$51,647,959	(\$4,525,705)	10.97%	\$5,105,159
31-60	\$31,053,835	(\$399,137)	34.03%	\$7,884,872
61-90	\$18,687,299	\$615,019	32.24%	\$4,555,831
91-120	\$9,828,162	\$945,753	31.07%	\$2,329,807
121-150	\$6,005,210	(\$302,402)	-15.08%	(\$1,066,347)
151-180	\$4,598,941	\$178,932	28.69%	\$1,025,416
181-270	\$10,098,032	(\$860,617)	13.36%	\$1,190,022
271-365	\$8,190,526	\$835,636	10.52%	\$779,696
>365	\$4,564,656	(\$104,544)	-41.01%	(\$3,173,219)
Total	\$708,734,823	(\$56,390,903)	9.04%	\$58,761,621

	Current	Current Month - Prior Month	YTD to PYTD	YTD - PYTD
Lorem	\$61,972,825	\$1,307,776	10.01%	\$5,641,206
Ipsum	\$148,378,602	(\$62,381,660)	13.77%	\$17,961,566

Sit Dolor



Market

NCAL	SCAL	NW	HI	MAS	CO	GA	WA
------	------	----	----	-----	----	----	----

Lorem

HB	PB
----	----

Ipsum

Capitated Coverage	Non-Capitated KP Coverage	Non-KP Coverage	No Coverage
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Lorem Ipsum

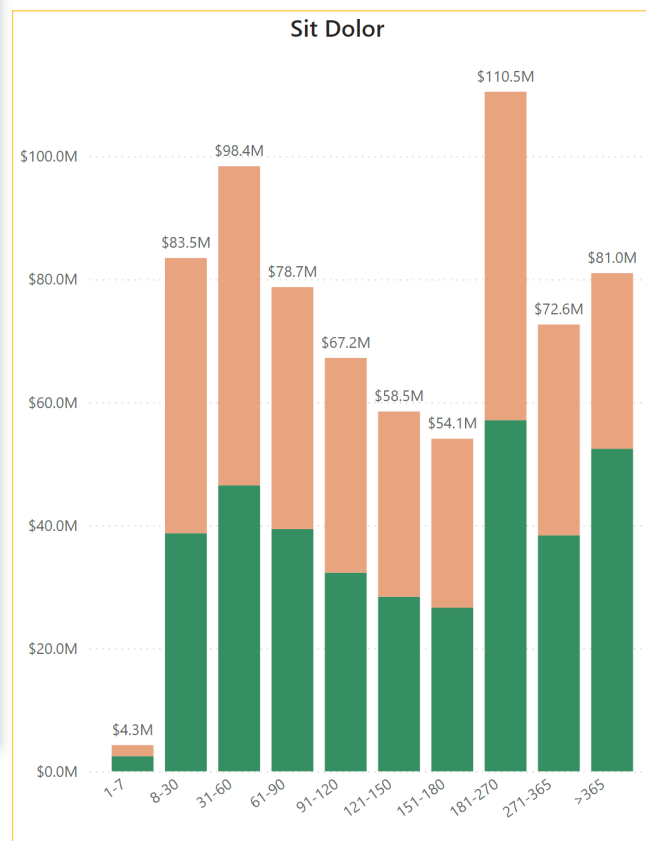
Click on a line to influence chart on the right -->

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121-150	\$52,498,319	(\$1,844,213)	-3.35%	(\$1,819,278)
151-180	\$49,484,942	\$1,148,952	5.65%	\$2,647,614
181-270	\$100,389,166	(\$2,229,922)	9.19%	\$8,450,975
271-365	\$64,449,562	\$7,592,467	29.99%	\$14,870,518
>365	\$76,426,693	\$2,484,038	52.49%	\$26,309,148
Unbilled Patient	\$148,378,572	\$62,381,660	13.77%	\$17,961,536
1-7	\$3,703,954	(\$58,764,595)	-15.31%	(\$669,700)
8-30	\$51,647,959	(\$4,525,705)	10.97%	\$5,105,159
31-60	\$31,053,835	(\$399,137)	34.03%	\$7,884,872
61-90	\$18,687,299	\$615,019	32.24%	\$4,555,831
91-120	\$9,828,162	\$945,753	31.07%	\$2,329,807
121-150	\$6,005,210	(\$302,402)	-15.08%	(\$1,066,347)
151-180	\$4,598,941	\$178,932	28.69%	\$1,025,416
181-270	\$10,098,032	(\$860,617)	13.36%	\$1,190,022
271-365	\$8,190,526	\$835,636	10.52%	\$779,696
>365	\$4,564,656	(\$104,544)	-41.01%	(\$3,173,219)
Total	\$708,734,823	\$56,390,903	9.04%	\$58,761,621

	Current	Current Month - Prior Month	YTD to PYTD	YTD - PYTD
Lorem	\$61,972,825	\$1,307,776	10.01%	\$5,641,206
Ipsum	\$148,378,602	(\$62,381,660)	13.77%	\$17,961,566



Sit Dolor



Interactive page Annotated

Most everything in Power BI is interactive. In the chart on the left we told the analyst what they must do through a subtitle. B2B does not require subtlety, so feel free to be overt with what you want them to do.

Lorem Ipsum

Click on a line to influence chart on the right -->

And that is it!

Feel free to contact me at any
time 😊

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