INSURANCE CLAIMS ANALYSIS USING POWER



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TRAINING CENTER

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Introduction

Insurance Claims Analysis Using Power BI Training Course gives claims, operations and finance professionals the analytical skills to understand what claims data is really saying. Participants learn how to prepare claim extracts, build measures and design dashboards that reveal frequency, severity, leakage and settlement speed. The programme covers Power Query data preparation, DAX measures, star schema modelling, loss ratio analysis and fraud indicator reporting. Furthermore, it addresses data quality, claims leakage detection and the governance rules that protect policyholder data. As a result, delegates can turn claims registers into decisions on reserving, triage and process improvement. Gentex Training Center delivers the programme through hands-on dashboard workshops.

Insurance Claims Analysis Using Power BI Course Objectives

- Explain the claims lifecycle and the data each stage produces.
- Extract and clean claims data using Power Query and SQL sources.
- Build a star schema model with claims, policies, dates and parties tables.
- Write DAX measures for claim counts, average severity and settlement days.
- Calculate loss ratios, incurred claims and development patterns.
- Identify claims leakage and anomalous payment indicators.
- Design interactive dashboards for claims operations and management.
- Apply drill-through, slicers and bookmarks for claims investigation.
- Apply data quality checks, lineage and access controls to claims data.
- Present findings and recommendations clearly to claims and finance leaders.

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Course Methodology

The course combines short demonstrations with extensive hands-on Power BI workshops using realistic claims datasets. Participants build queries, model data, write DAX measures and publish dashboards, then present insights to a review panel. In addition, structured peer critique and group discussion reinforce each technique, and every day closes with an applied analytical task.

Who Should Take This Course

- Claims analysts, handlers and team leaders.
- Insurance operations and performance managers.
- Actuarial support and reserving analysts.
- Fraud investigation and recovery teams.
- Finance and management reporting staff in insurers.
- Data analysts supporting claims and underwriting functions.

Insurance Claims Analysis Using Power BI Course Outlines

Day 1: Claims Data Fundamentals and Power Query

- The claims lifecycle from notification to settlement and recovery.
- Data sources: claims systems, policy administration and payment files.
- Power Query for extraction, cleaning, merging and transformation.
- Handling messy data: duplicates, missing values and date formats.
- Defining grain, keys and relationships before modelling.

- Data quality checks and preparation documentation.
- Workshop: preparing a claims extract in Power Query.

Day 2: Data Modelling and DAX Measures

- Star schema design for claims analytics.
- Fact and dimension tables: claims, policies, dates, parties and covers.
- Relationship design, filter direction and handling inactive relationships.
- DAX basics: calculated columns versus measures.
- Core measures: claim count, gross and net incurred, average severity.
- Time intelligence for development patterns and period comparisons.
- Workshop: building a claims data model with core DAX measures.

Day 3: Claims Performance and Leakage Analysis

- Loss ratio, claim frequency and severity analysis by segment.
- Settlement cycle time and outstanding claims analysis.
- Case reserving accuracy and development pattern review.
- Claims leakage indicators and expense analysis.
- Reopened claims, recoveries and subrogation tracking.
- Benchmarking by branch, handler, product and cause.
- Workshop: analysing leakage indicators in a claims portfolio.

Day 4: Dashboard Design and Interactive Reporting

- Dashboard design principles for claims operations.
- Building visuals: matrices, charts, KPI cards and decomposition trees.
- Slicers, drill-down and drill-through for investigation.

- Bookmarks, tooltips and custom navigation.
- Publishing, scheduled refresh and row-level security.
- Common visualisation pitfalls in claims reporting.
- Workshop: designing an interactive claims operations dashboard.

Day 5: Fraud Indicators, Governance and Reporting

- Anomaly indicators: repeated claimants, unusual timing and round amounts.
- Building exception reports and watchlists in Power BI.
- Integrating external data such as repair networks and providers.
- Data protection, access control and policyholder confidentiality.
- Documenting methodology and supporting audit review.
- Presenting insights and recommendations to management.
- Workshop: presenting a claims insight pack before a review panel.

Conclusion

By successfully completing Insurance Claims Analysis Using Power BI Training Course, participants will have acquired the knowledge to analyse claims data and communicate what it shows. They will understand Power Query preparation, data modelling, DAX measures, loss ratio and leakage analysis, dashboard design and governance, and they will know how to turn findings into operational action. As a result, delegates improve settlement speed, control leakage and support better reserving. Gentex Training Center builds the programme around current analytics practice.

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FAQs for the Insurance Claims Analysis Using Power BI course

Q1 What is the "Insurance Claims Analysis Using Power BI" course about?

It teaches how to analyse insurance claims data and report it visually. You cover Power Query preparation, star schema modelling, DAX measures, loss ratio and leakage analysis, dashboard design and governance, with hands-on work on realistic claims datasets.

Q2 What are the key benefits of the "Insurance Claims Analysis Using Power BI" course?

You gain the ability to spot leakage, slow settlement and reserving gaps from data rather than instinct. You also cut manual reporting effort, build dashboards management actually uses, and strengthen the evidence behind fraud referrals and process changes.

Q3 What skills will I gain from the "Insurance Claims Analysis Using Power BI" course?

You will gain claims data preparation and modelling, DAX measure development for claims metrics, claims performance and leakage analysis, and interactive dashboard design and governance.

Q4 What tools, methods, or standards are covered in the "Insurance Claims Analysis Using Power BI" course?

The course covers Microsoft Power BI with Power Query, DAX measures and time intelligence, star schema data modelling, SQL data extraction, loss ratio and settlement cycle metrics, leakage indicator analysis, row-level security, scheduled refresh and exception reporting for fraud indicators.

Q5 How is the "Insurance Claims Analysis Using Power BI" course applied in real-world practice?

Graduates apply it to build claims dashboards for handlers and managers, monitor settlement speed and outstanding claims, analyse loss ratios by product and branch, run leakage and anomaly exception reports, support reserving reviews, and prepare evidence for management and audit discussions.