



SHP Dashboard Updates: Alert Management & PDGM Revenue



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Winning Wednesday Webinar Series



Learning Objectives

- ✓ Overview of New Dashboard Tools
- ✓ Alert Management
 - Introduction to New Widgets
 - The New Alert Impact Report
 - Use Cases
- ✓ PDGM Revenue Review
 - Introduction to New Widgets
 - Use Cases




Navigating to the Dashboard Features

- ▶ Log in to SHP (www.shpdata.com)
- ▶ Click on the **Dashboard** option on the menu, then select one of the new **views/tabs** which have been added to your personal Dashboard

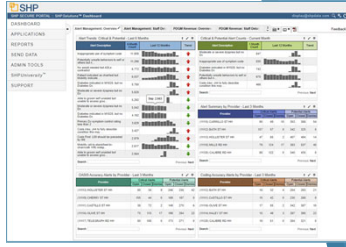




Getting Started with the New Dashboard

Preset Views Available

- SHP has created new preset Dashboard views to help get you started with these new tools
- These views were created in collaboration with our clients to address the most commonly requested use cases not already covered by our Dashboard



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Getting Started with the New Dashboard

The New Preset Views Include:

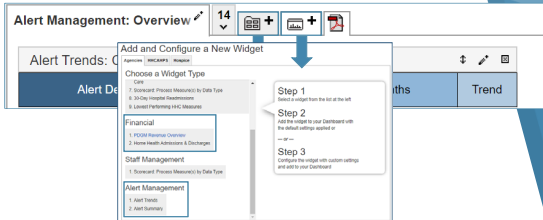
- Alert Management: Staff Detail
- Alert Management: Overview
- PDGM Revenue: Staff Detail
- PDGM Revenue: Overview



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How to Add a New View or Widget

- Click on the "Add View" box to add a new view
- Click on the "Add Widget" box to add a widget to a view



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Customizing Your Views and Widgets

- Click on the wand on each widget to configure the details

Alert Management: Overview 16 Feedback?

Alert Trends: Critical & Potential - Last 3 Months

Alert Description	6 Month Count	Last 12 Months	Trend
[Empty table body]			

Enterprise CASTLEOST HI

Title
Alert Trends: Critical & Potential - Last 6 Months

Color
Blue Steel

Date Range
Last 6 Months

Alert Type
Undefined

Notes: Select the set of alerts on which you want to report. Update the title of the widget based on your selections to avoid confusion.
Current month is included in Month Count, but excluded from Trend. Trend arrows are based on the linear score of the data in the selected time period: green arrow indicates a greater than 2 decrease in alert volume, red arrow indicates a greater than 2 increase.

Save Cancel

SHP 7

Alert Management Views and Use Cases

SHP 8

New Alert Management Views

- The Default Views below are available to all SHP users

Overview: High Level

Staff Detail: Specific

SHP 9

Color Coded Widgets to Stay Organized

Color

- Violet
- Navy
- Blue Steel
- Aqua
- Olive
- Umber
- Sienna
- Silver
- Magnum

Provider	Critical Alerts	Potential Alerts
111113 GARRILLO ST HH	90	49
111113 BATH ST HH	157	57
111113 HOLLISTER ST HH	47	85
111113 MILLS RD HH	79	124
111203 CALBINE RD HH	88	122

SHIP 10

Alert Management Customizations

- Within the widget customization box, select from a variety of options, including:
- Provider Level, Title, Color, Date Range, Alert Type, Alert Severity, Alert Status and Assessment Reason

Clinician	Critical Alerts	Potential Alerts
AMABLE, AMY	24	3
CORDAL, CHRISTINE	17	10
KIND, KATRINA	17	1
LEONARD, LENNY	16	2
HELPFUL, HENRY	14	10

Team	Critical Alerts	Potential Alerts
GOLD TEAM	11	18
BLUE TEAM	6	11
YELLOW TEAM	8	10
ORANGE TEAM	0	0
CHARCOAL TEAM	5	39

SHIP 11

Introducing the NEW Alert Impact Report!

Alert Trends: Critical & Potential - Last 3 Months

Alert Description	6 Month Count	Last 12 Months
Ambulation severity in conflict with transferring so	1,114	845
Code Alert: I&4 to fully describe condition this may	845	715
Diabetes indicated in M1020, but no Diabetes Dx	715	697
Alert to groom self unaided but unable to access privs	697	

SHIP 12

Alert Impact Drill-Down Report

- Alert Impact Detail report with filters applied
- Summary Section
- Trend Section

SHP Alert Impact
 CAHPS HEALTH HEALTH
 MMD/YYYY - MM/DD/YYYY
 Report Date: MM/DD/YYYY

[D] Critical Alert: FDOM Clinical Group: This CD code is unacceptable for use as a primary diagnosis under FDOM. This code is not included in a FDOM Clinical Group and is not eligible for payment effective January 1, 2020.
 [X] Severity Filter: Critical & Potential [X] Alert Type Filter: Case Mix Accuracy

Summary	Total	Open	Closed	Dismiss
Critical	474	99	375	14
Potential	0	0	0	0
Informational	0	0	0	0
Total	474	99	375	14

Legend: Total (Orange bar), Open (Blue line), Closed (Green line), Dismiss (Red line)
 Y-axis: 0 to 300. X-axis: Jun, Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May



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Alert Impact Drill-Down Report (Cont'd)

- Groupings for the Providers, Clinicians, Teams and Case Managers associated with the Selected Alert or Alert Category

Provider	Total	Open	Closed	Dismiss	Clinician	Total	Open	Closed	Dismiss
[11111] CASSELL, D.H.H.	53	53	0	0	HELFER, ANDREW	17	1	16	0
[11112] BATH, H.H.	44	23	24	1	CORDIAL, CHRISTINE	13	0	13	0
[11120] CALBRE, H.H.	30	1	25	0	SAMPLE, SAM	13	0	13	0
[11114] HALEY, H.H.	34	4	26	2	HOPFEL, HELEN	10	0	10	0
[11118] OLIVE, H.H.	30	0	30	0	CORAZON, KELLY	8	0	8	1

Team	Total	Open	Closed	Dismiss	Case Manager	Total	Open	Closed	Dismiss
BLUE TEAM	28	2	26	0	(Not Assigned)	61	16	45	0
YELLOW TEAM	21	14	7	0	DOTING, DANNY	10	0	0	0
RED TEAM	20	1	19	0	CORDIAL, CHRISTINE	9	0	9	0
GOLD TEAM	20	3	17	0	AMBULE, AMY	9	0	9	0
ORANGE TEAM	16	0	16	0	HOPFEL, HELEN	7	0	7	0



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Alert Impact Drill-Down Report (Cont'd)

- The "Related Critical and Potential Alerts" section shows the alerts that showed up the most frequently when the selected alert was also present

Related Critical & Potential Alerts	Total	Open	Closed	Dismiss
Diabetes Indicated in M1020, but no Diabetes Dx	82	18	64	3
Ambulation severity in conflict with transferring severity	69	9	60	12
Moderate or severe dyspnea but no Dx	68	11	57	0
Code Also J44 to fully describe condition this may be accompanied by J45	61	26	35	0
Diabetes and PVD/PAD Indicated in M1020, but no Dx Codes	33	9	24	2
Able to walk only with supervision but able to bathe self at chair/bedroomcode	22	8	14	4
PDOM Comorbidity, Reason 1 - Non specific Dx for chronic kidney disease	19	4	15	7
Use Additional Code E11.22 should be followed by N18.1 - N26.6	16	12	4	2
PVD or PAD Indicated in M1020, but no PVD or PAD Dx	17	2	15	2
M1311 indicates pressure ulcers/leg ulcers but no Dx of pressure ulcer/leg ulc	16	1	15	1



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Saved Views in the Alert Manager

- If there is an alert category that you would like to monitor, reach out to your SHP Customer Manager to set up a "Saved View" that shows patient detail data for a specified alert



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Alert Management Use Case #1

- How can I review only my Open Critical and Potential Alerts?
- Steps to achieve the results

- 1) Navigate to or add the Alert Management: Overview (for a high level view) or the Alert Management: Staff Detail (for a Granular view)
- 2) "Alert Summary by..." Provider, Clinician, Case Manager, Team, etc.
- 3) Click on the "Open" header at the top of the column under Critical or Potential to sort in descending order

Provider	Critical Alerts			Potential Alerts		
	Open	Closed	Dismissed	Open	Closed	Dismissed
(11117) OLIVER HH	276	285	51	1,011	1,283	373
(11114) CHERRY HH	198	124	8	696	727	111
(11119) TELEGRAPH HH	53	37	5	222	219	68
(11120) BELFAST HH	52	97	40	219	487	264
(11135) ORANGE HH	25	85	5	90	307	79



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Alert Management Use Case #2

- What are my most common alerts in the last 6 months?
- Steps to achieve the results

- 1) Navigate to or add the Alert Management: Overview (for a high level view) or the Alert Management: Staff Detail (for a Granular view)
- 2) Review "Alert Trends: Critical & Potential - Last 6 Months". Under the "6 Month Count" column, you will be able to see the most frequent alerts for the level of the organization you've been granted access

Alert Description	6 Month Count	Last 12 Months	Trend
Intermittent use of symptom scales	2,290	[Bar Chart]	↑
Attribution severity is conflicted with transferring to...	1,300	[Bar Chart]	↓
Caregiver did not fully describe condition this may	1,288	[Bar Chart]	↓
Physically unsafe behaviors to self or others did n...	1,000	[Bar Chart]	↓
No action needed but A/C/Ls contraindicated	1,000	[Bar Chart]	↑
Diabetes indicated in HPI/QR, but no Diabetes Dx	978	[Bar Chart]	↓
Alert triggered self checked but unable to access group	715	[Bar Chart]	↓
PODM Critical Group, Primary Dx Unacceptable - No TO	656	[Bar Chart]	↑



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PDGM Revenue Views and Use Cases

New PDGM Revenue Views

- PDGM Revenue – Overview and Staff Detail

Overview:

Provider	Period	Case Wt	Total Payment	Potential Revenue	Realized Revenue
AMBIABLE, ARMY	134	1.383	0.947	\$234K	\$1,856
HELPFUL, HENRY	236	1.488	0.946	\$431K	\$1,684
CORDIAL, CHRISTINE	52	1.428	0.967	\$170K	\$1,618
SAMPLE, SAM	69	1.350	0.937	\$155K	\$1,534
DOTING, DANNY	83	1.369	0.916	\$111K	\$1,497

Staff Detail:

Staff	Period	Case Wt	Total Payment	Potential Revenue	Realized Revenue
AMBIABLE, ARMY	134	1.383	0.947	\$234K	\$1,856
HELPFUL, HENRY	236	1.488	0.946	\$431K	\$1,684
CORDIAL, CHRISTINE	52	1.428	0.967	\$170K	\$1,618
SAMPLE, SAM	69	1.350	0.937	\$155K	\$1,534
DOTING, DANNY	83	1.369	0.916	\$111K	\$1,497

PDGM Revenue Use Case #1

- Which Clinicians/Case Managers have the highest Potential or Realized Revenue associated with their patients?

Clinician	Period #	Case Wt	Total Payment	Potential Revenue	Realized Revenue
Amiable, Army	134	1.383	0.947	\$234K	\$1,856
Helpful, Henry	236	1.488	0.946	\$431K	\$1,684
Cordial, Christine	52	1.428	0.967	\$170K	\$1,618
Sample, Sam	69	1.350	0.937	\$155K	\$1,534
Doting, Danny	83	1.369	0.916	\$111K	\$1,497

Search: Previous Next

PDGM Revenue Use Case #2

- How do I configure the PDGM Revenue widget for different groups of Providers, Regions, Clinicians, etc?

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PDGM Revenue Use Case #2 (Cont'd)

- You can use the same widget for reporting on different provider groupings in your organization

Provider	Critical Alerts		Potential Alerts	
	Open	Closed/Dismiss	Open	Closed/Dismiss
(11117) OLIVER HH	178	310	55	1,035
(11114) CHERY HH	63	37	5	234
(11119) TELEGRAPH HH	180	125	9	722
(11120) BELFAST HH	15	87	0	119
(11130) ORANGE HH	24	86	1	140

Provider	Critical Alerts		Potential Alerts	
	Open	Closed/Dismiss	Open	Closed/Dismiss
(11116) IVY HH	180	302	52	900
(11122) BORDER HH	176	37	5	225
(11128) SPRINGBOK HH	170	124	8	660
(11127) ISLAND HH	80	87	0	116
(11130) BLUE SKY HH	75	86	1	132

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Practical Application of the Dashboard

- Spot the areas of importance across the enterprise
- Configure the Dashboard according to your needs
- New Dashboard widgets will allow you to stay on top of your most urgent opportunities for improvement

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Questions for Internal Discussion

- Which Measures are Our Focus?
- How are We Doing with Assessing Our Performance?
- Which Case Managers are Our Top Performers?
- Do We Have Members of the Team Who Need Additional Training?
- Are We Meeting Our Long-Term Goals?
- How Will We Share This Information with Our Stakeholders?
- Do We Need More Training for SHP?



Use Case Questions Answered

Documents demonstrating how to use the Dashboard for the use cases below have been created and are attached to the Webinar as handouts:

- Alert Management: How can I review my open Critical and Potential alerts?
- Alert Management: What are my most common alerts in the last 6 months?
- PDGM: What clinician(s)/staff grouping(s) have the highest potential and realized revenue?
- All: What if I need to have multiple versions of the same view for different regions, or individual providers within my enterprise?
- Additional use case documents will be added as we obtain feedback and input from our users



Conclusion



Other New Resources

- ▶ **COVID-19:** SHP has released a number of specific COVID-19 report updates to help your organization deal with the changes resulting from this pandemic
- ▶ **Client Data Export:** If you're looking for additional analytics tools for Alert Management and PDGM, several new exports have been added the Client Data Export (CDE) tool
- ▶ **New Scorecard Widget:** This summer we will be adding a new Scorecard widget, stay tuned!

CLIENT DATA EXPORT

- Agencies
- Alerts - Aggregate
- Clinical Measures - Aggregate
- Clinical Measures - Benchmark
- Clinical Measures - Detail
- HH Stay - Aggregate
- HH Stay - Benchmark
- HH Stay - Detail
- QMSIS Assessment - Detail
- Payment Episodes - Aggregate
- Payment Episodes - Benchmark
- Payment Episodes - Detail
- PDGM Period Measures - Aggregate by Field
- PDGM Period Measures - Detail by Patient
- PDGM Stay Measures - Aggregate by Stay
- PDGM Stay Measures - Detail by Patient



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We'd Love to Hear from You!

- ▶ As you begin using the Dashboard, let us know if you have use cases you've found valuable as you custom configure your widgets
- ▶ As always, don't hesitate to contact your SHP Customer Manager or our Support department with any questions or if you would like additional live training

Submit a Support Ticket...
For prompt service, please submit the form below.



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STRATEGIC HEALTHCARE PROGRAMS

Thank you for attending!

Questions? Please Contact Us At:
Support@SHPdata.com
 or call (805) 963-9446