SHP

STRATEGIC HEALTHCARE PROGRAMS

SHP Dashboard Updates:

Alert Management & PDGM Revenue

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Winning Wednesday Webinar Series

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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*

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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
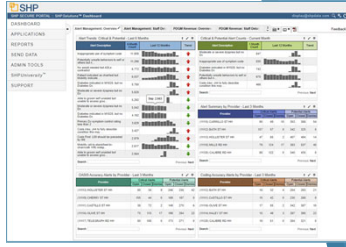
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Getting Started with the New Dashboard

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
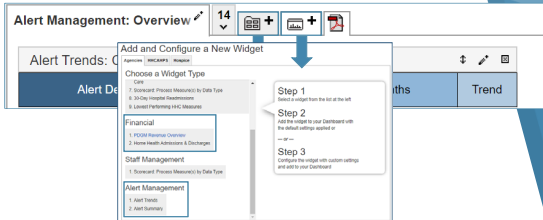
The New Preset Views Include:

- 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 Views and Use Cases

New Alert Management Views

‣ The Default Views below are available to all SHP users

Overview: High Level   Staff Detail: Specific

Color Coded Widgets to Stay Organized

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

Introducing the NEW Alert Impact Report!

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Alert Impact Drill-Down Report

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

SHP — **Alert Impact** — CASTILLO HOME HEALTH — MM/DD/YYYY - MM/DD/YYYY — Report Date: MM/DD/YYYY

[X] **Critical Alert:** PDGM Clinical Group: This ICD code is unacceptable for use as a primary diagnosis under PDGM. This code is not included in a PDGM 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

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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
(11111) CASTILLO HH	103	50	53	6
(11112) BATH HH	44	20	24	1
(11120) CALIBRE HH	36	1	35	0
(11114) HALEY HH	34	9	26	2
(11116) OLIVE HH	30	0	30	0

Clinician	Total	Open	Closed	Dismiss
HELPFUL, HENRY	17	1	16	0
CORDIAL, CHRISTINE	13	0	13	0
SAMPLE, SAM	13	0	13	0
HOPEFUL, HELEN	10	0	10	0
CORAZON, KELLY	8	0	8	1

Team	Total	Open	Closed	Dismiss
BLUE TEAM	28	2	26	0
YELLOW TEAM	21	14	7	0
RED TEAM	20	1	19	0
GOLD TEAM	20	3	17	0
ORANGE TEAM	16	0	16	3

Case Manager	Total	Open	Closed	Dismiss
(Not Assigned)	61	16	45	0
DOTING, DANNY	10	10	0	0
CORDIAL, CHRISTINE	9	0	9	0
AMIABLE, AMY	9	0	9	0
HOPEFUL, 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 M1028, 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	9
Code Also: J44 to fully describe condition this may be accompanied by J45 -	61	26	35	20
Diabetes and PVD/PAD indicated in M1028, but no Dx Codes	33	9	24	2
Able to walk only with supervision but able to bathe self at chair/sink/commode	22	8	14	4
PDGM Comorbidity: Renal 1 - Non-specific Dx for chronic kidney disease	19	4	15	7
Use Additional Code: E11.22 should be followed by N18.1 - N18.6	18	12	6	2
PVD or PAD indicated in M1028, but no PVD or PAD Dx	17	2	15	2
M1311 indicates pressure ulcer/injury but no Dx of pressure ulcer/injury	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

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

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

PDGM Revenue Views and Use Cases

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New PDGM Revenue Views

▸ **PDGM Revenue** – Overview and Staff Detail

Overview:

Staff Detail:

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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
		Early	Late			
Amiable, Amy	134	1.383	0.947	$234K	$1,856	$4,240
Helpful, Henry	236	1.488	0.946	$431K	$1,694	$4,394
Cordial, Christine	52	1.428	0.967	$170K	$1,618	$1,288
Sample, Sam	69	1.350	0.937	$155K	$1,534	$0
Doting, Danny	83	1.369	0.916	$111K	$1,497	$1,909

PDGM Revenue by Clinician - Last 3 Months

Search: Previous Next

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PDGM Revenue Use Case #2

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

PDGM Revenue Use Case #2 (Cont'd)

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

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

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?

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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

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Conclusion

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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
  - OASIS Assessment - Detail
  - Payment Episodes - Aggregate
  - Payment Episodes - Benchmark
  - Payment Episodes - Detail
  - PDGM Period Measures - Aggregate by Period
  - 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

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Thank you for attending!

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