

Quick Start Guide

SHP Dashboard PDGM Revenue Use Cases 1 & 2

What's Inside this Guide?

This guide will walk through the SHP Dashboard PDGM Revenue use cases discussed in the 05/20/2020 National Webinar: "SHP Dashboard Updates: Alert Management & PDGM Revenue". Here, you will find detailed information regarding the steps to prepare the widgets to match each use case. These features are for use with the "SHP for Agencies" product. Financial Permissions will be required to access the full range of these features.

Where to Find the Dashboard

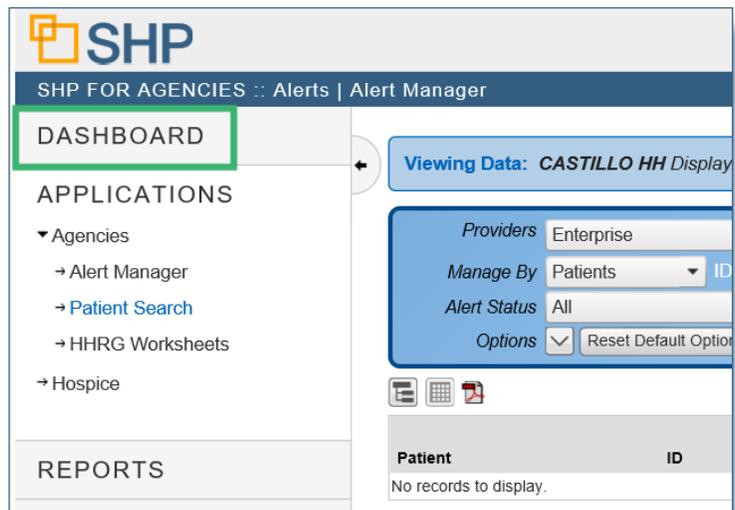
Log in to the SHP Program (accessed through the site: www.shpdata.com), the Dashboard tab will be located in the far upper left-hand corner of the SHP homepage. Click on this tab to access your personal dashboard.

Configuring the Widgets

Each box that contains data on the Dashboard is known as a "widget". To adjust the details of any of the widgets on your dashboard, simply click on the pencil or wand, found in the upper right-hand side of the widget you're looking to customize. For More informatoin about setting up views and widgets, please see the Quick Start guide: Adding New Views and Widgets to the Dashboard.

Clinician	Period #	Case Wt		Total Payment	Potential Revenue	Realized Revenue
		Early	Late			
AMIABLE, AMY	28	1.180	0.743	\$29,237	\$1,486	\$1,656
CARLSON, CARLY	45	1.332	0.851	\$47,658	\$1,409	\$657
SAMPLE, SAM	42	1.490	0.905	\$62,948	\$1,321	\$1,038
CORDIAL, CHRISTINE	15	1.345	1.022	\$27,723	\$1,002	\$459
OLSON, OLLY	49	1.377	0.868	\$61,421	\$993	\$410

Search: Previous Next



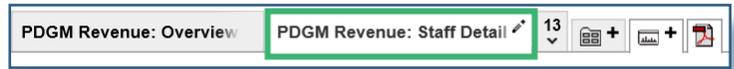
The screenshot shows the SHP dashboard interface. On the left is a navigation menu with 'DASHBOARD' highlighted. Below it are sections for 'APPLICATIONS' (Agencies, Alert Manager, Patient Search, HHRG Worksheets, Hospice) and 'REPORTS'. On the right, there are filter controls for 'Providers' (Enterprise), 'Manage By' (Patients), 'Alert Status' (All), and 'Options' (Reset Default Option). A table below shows 'Patient ID' with the message 'No records to display.'

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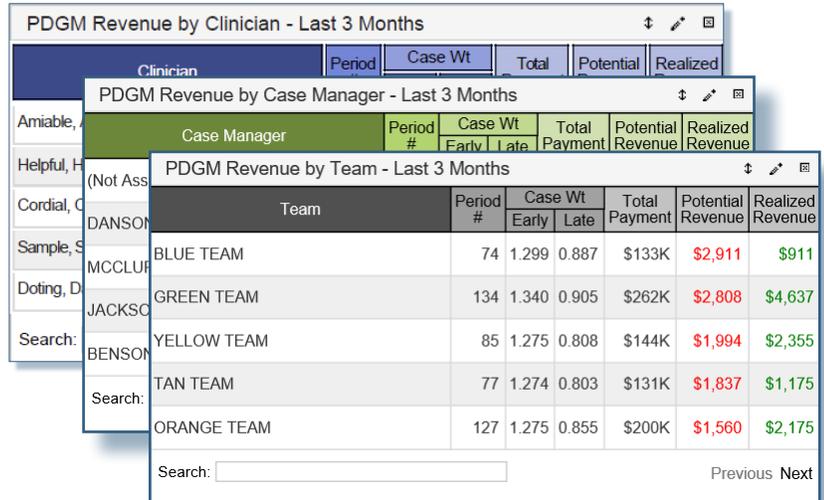
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PDGM Revenue Use Case #1 - Which Clinicians/Case Managers/Teams Have the Highest Potential or Realized Revenue Associated with Their Patients?

1) Access the Dashboard tab, navigate to, or add, the PDGM Revenue: Staff Detail view.



2) SHP has created widgets that have been included in your PDGM Revenue: Staff Detail view. Scroll down on this view to see the widgets for the PDGM Revenue by Clinician, Case Manager, and Team, and then select the widget you would like to view.



3) Once you've selected the PDGM Revenue widget you would like to view, it will initially be sorted in alpha-numeric order. To sort the Data Type by potential revenue left on the table, click on the column header for "Potential Revenue" and then the revenue values for unresolved alerts associated with the Data Type will be placed in descending order. In the example to the right, Data Type is set to "Case Manager".

Case Manager	Period #	Case Wt		Total Payment	Potential Revenue	Realized Revenue
		Early	Late			
(Not Assigned)	91	1.389	0.934	\$35,040	\$6,880	\$25,203
DANSON, DAN	12	1.361	0.901	\$24,645	\$1,499	\$0
MCCLURE, TROY	41	1.501	0.905	\$65,536	\$1,321	\$1,038
JACKSON, JACK	45	1.369	0.843	\$68,179	\$1,191	\$1,019
BENSON, BRITTANY	46	1.365	0.847	\$75,099	\$1,129	\$161

4) To highlight the highest values of Realized Revenue (when alerts have been corrected and revenue is recovered), click on the column header "Realized Revenue" and then the widget will place the revenue values in descending order.

Case Manager	Period #	Case Wt		Total Payment	Potential Revenue	Realized Revenue
		Early	Late			
(Not Assigned)	91	1.389	0.934	\$35,040	\$6,880	\$25,203
HELPFUL, HENRY	50	1.408	0.870	\$86,263	\$0	\$7,785
LENNY, DONNA	47	1.408	0.896	\$84,674	\$338	\$4,597
PEGGY, JOHN	58	1.450	0.881	\$95,983	\$696	\$4,258
AMIABLE, AMY	43	1.464	0.890	\$78,125	\$320	\$4,159

PDGM Revenue View Use Case #2 - What if I Need to Configure a View to Track Revenue for Multiple Regions, Divisions, or Providers for Payment Results?

1) Once you've accessed the Dashboard tab, navigate to or add, the PDGM Revenue view you would like to have included or create a new view or widget (see the SHP Quick Start guide: Adding New Views and Widgets to the Dashboard).



2) Use the new color coding options to track all of the clinicians, case managers, teams, providers and many other Data Types associated with the region or division you would like to group together.

Example (see images to the right): You might determine that all of West Division's widgets will be tracked using the color Olive, and all of East Division's widgets will be set to Navy. You can add many different views and widgets to your Dashboard according to your goals. Feel free to reach out to your SHP Customer Manager for further assistance with configuring these views.

A screenshot of a table titled 'West Division PDGM Revenue by Clinician - Last 3 Months'. The table has columns for Clinician, Period #, Case Wt (Early, Late), Total Payment, Potential Revenue, and Realized Revenue. The 'Potential Revenue' and 'Realized Revenue' columns are color-coded: red for negative values and green for positive values. An orange arrow points from the text above to the 'West Division' tab.

Clinician	Period #	Case Wt		Total Payment	Potential Revenue	Realized Revenue
		Early	Late			
(Not Assigned)	91	1.389	0.934	\$35,040	\$6,880	\$25,203
HELPFUL, HENRY	50	1.408	0.870	\$86,263	\$0	\$7,785
LENNY, DONNA	47	1.408	0.896	\$84,674	\$338	\$4,597
PEGGY, JOHN	58	1.450	0.881	\$95,983	\$696	\$4,258
AMIABLE, AMY	43	1.464	0.890	\$78,125	\$320	\$4,159

A screenshot of a table titled 'East Division PDGM Revenue by Clinician - Last 3 Months'. The table has columns for Clinician, Period #, Case Wt (Early, Late), Total Payment, Potential Revenue, and Realized Revenue. The 'Potential Revenue' and 'Realized Revenue' columns are color-coded: red for negative values and green for positive values. An orange arrow points from the text above to the 'East Division' tab.

Clinician	Period #	Case Wt		Total Payment	Potential Revenue	Realized Revenue
		Early	Late			
SAMPLE, SAM	63	1.412	0.925	\$119K	\$780	\$8,249
FREEMONT, FELDA	88	1.393	0.859	\$153K	\$818	\$5,255
ANGELICA, ANGIE	72	1.491	0.951	\$136K	\$0	\$5,033
TELLER, TED	50	1.487	1.042	\$102K	\$309	\$4,713
LIZZY, LIV	11	1.628	1.271	\$26,438	\$0	\$4,250

Support

If you have any additional questions regarding the information found in this report, please contact us at (805) 963-9446, or by email at training@SHPdata.com.