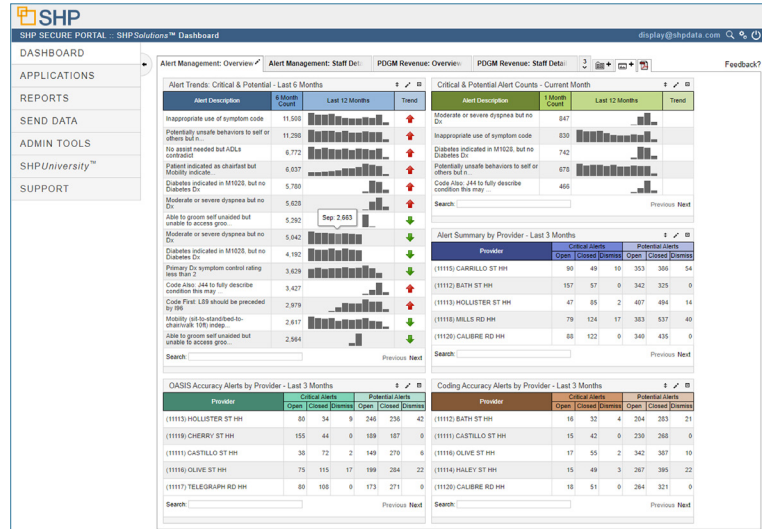


Quick Start Guide

Adding Views and Widgets to the Dashboard

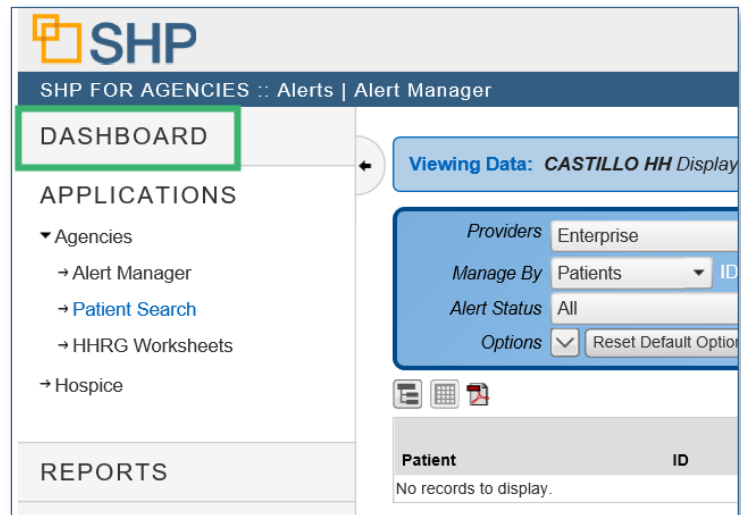
What's Inside this Guide?

The first step to using the SHP Dashboard, is to learn how to add or adjust views, and configure the individual “Widgets” or boxes that are found within the Dashboard. This guide will provide a basic walk-through of how to add a new view or widget to your Dashboard. The final pages of this document provides a brief definition of the available parameter options.



Where to Find the Dashboard

Once you've logged in to the SHP Program (accessed through: www.shpdata.com), the Dashboard tab will be located in the far upper left-hand corner of the SHP home-page. Click on this tab to access your personal dashboard.



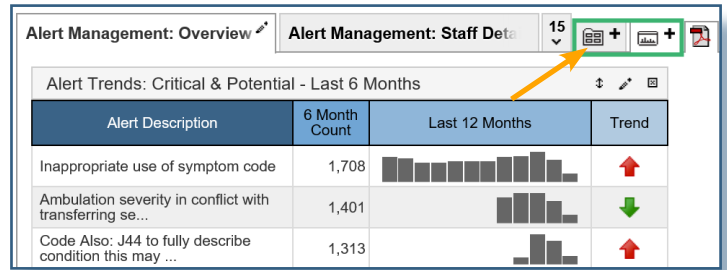
Configuring the “Widgets”

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 look for the pencil or wand, found in the upper right-hand side of the widget you're looking to customize.

Alert Trends: Critical & Potential - Last 6 Months			
Alert Description	6 Month Count	Last 12 Months	Trend
Inappropriate use of symptom code	2,308		↑
Ambulation severity in conflict with transferring se...	1,401		↓
Code Also: J44 to fully describe condition this may ...	1,313		↑

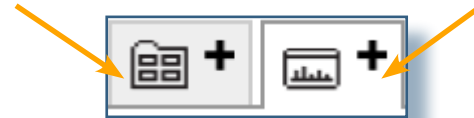
Adding Views and Widgets to Your Dashboard

1) Once you've accessed the Dashboard, in the upper right hand corner you will see two tabs. The one on the left is designed to assist you in creating a new view, and the one on the right will be used to add a new individual widget to an existing view.



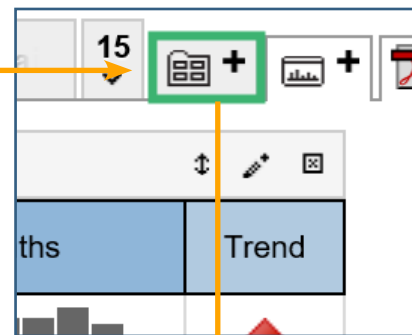
Add a New View

Add a New Widget



Add a New View

2) Adding a view will be very useful if you would like to start with a default Dashboard page, before customizing the widgets you would like to view. Once you've selected the "Add a New View" tab, select which view you would like to add to your Dashboard. Name the view, and select "Add this View" to add the view to your Dashboard.



Create a New View

Agencies | Hospice | HHCCHPS | Shared Views | Blank Template

Choose a View

- Home Health
- Public Scores
- Alert Management: Overview
- Alert Management: Staff Detail
- PDGM Revenue: Overview
- PDGM Revenue: Staff Detail

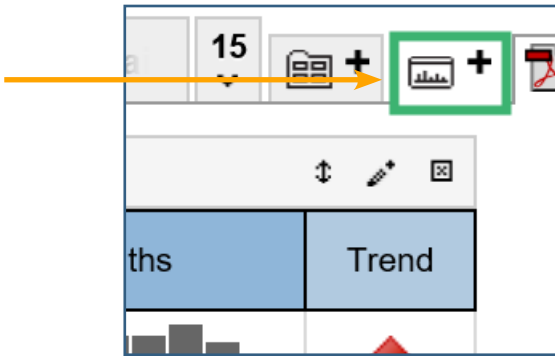
Home Health

Add this View

Add a New Widget

1) Add a New Widget. Select the “Add a New Widget” tab in the upper right-hand side of your Dashboard.

2) Select the widget type you would like to include on the left, and follow the steps to configure the widget and add it to a pre-existing Dashboard view.



Add and Configure a New Widget

Agencies **HCAHPS** Hospice

Choose a Widget Type

Clinical

1. Home Health Admissions & Discharges
2. Home Health Compare: Managing Daily Activities
3. Home Health Compare: Managing Pain and Treating Symptoms
4. Home Health Compare: Preventing Harm 1
5. Home Health Compare: Preventing Harm 2
6. Home Health Compare: Preventing Unplanned Hospital Care
7. Scorecard: Process Measure(s) by Data Type
8. 30-Day Hospital Readmissions
9. Lowest Performing HHC Measures

Financial

1. PDGM Revenue Overview
2. Home Health Admissions & Discharges

Step 1
Select a widget from the list at the left

Step 2
Add the widget to your Dashboard with the default settings applied or
— or —

Step 3
Configure the widget with custom settings and add to your Dashboard

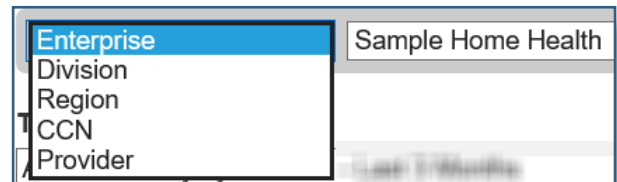
Alert Summary

A sortable snapshot of your total open, closed, and dismissed critical and potential alerts by provider, staff member, group, and more. Use this widget to identify education opportunities by Data Type.

[Configure this Widget](#) [Add to Dashboard](#)

Parameter Options

1) Provider Selection. Select the level of your organization to be included in the data for the widget.



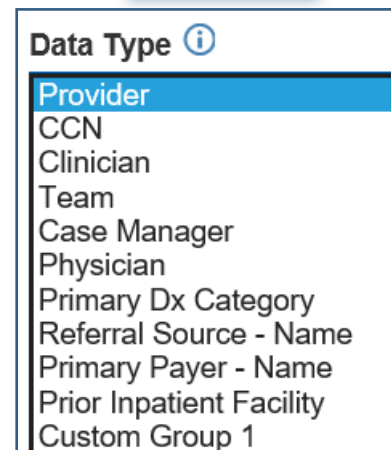
2) Title. Change the the title of the widget to suit your needs.



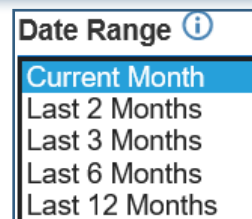
3) Color. The Color option will allow you to choose between 9 different options, to better track performance for similar widgets or results for Data Types. For example, you might choose to have all of your widgets associated with North Division be Violet, and all of your widgets for East Division could be Aqua.



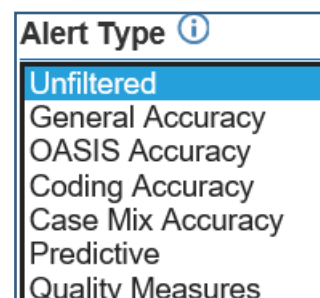
4) Data Type (when applicable). The Data Type field will determine which group from your organization is being included in the results that appear in the widget. The Data Type fields available will depend upon which of these fields SHP is able to receive from your EMR vendor.



5) Date Range. Choose one of the available date ranges to review your performance. The options range between the current month, and the last 12 months.



6) Alert Type (When Applicable). Select a specific type of SHP alert to be the focus of the results included for the widget.



Parameter Options (Cont'd)

7) Alert Severity (When Applicable). This field will filter the levels of severity for alerts.

Alert Severity ⓘ
Unfiltered
Critical
Critical & Potential
Potential
Informational

8) Assessment Reason (When Applicable). This field will filter the results according to the assessment type the alert is associated with.

Assessment Reason (M0100) ⓘ
Unfiltered
SOC (01)
ROC (03)
Recert (04)
Other Follow-Up (05)
Transfer (06)
Transfer w/ DC (07)
Death (08)
DC (09)
SOC/ROC (01, 03)
Recert/Follow-Up (04, 05)
TRF/DC (06, 07, 08, 09)
Comprehensive (01, 03, 04, 05)
Comprehensive Cert (01, 04)
Comprehensive Non-Cert (03, 05)

9) Payer Type (When Applicable). This will select the payer types associated with patient alerts for the widgets.

Payer Type
Unfiltered
Medicare Traditional
Medicare HMO/Advantage

10) Period Inclusion (When Applicable). The Exclude 'Pending' Status option will remove any pending payment periods from the results included in the widget.

Period Inclusion ⓘ
Unfiltered
Exclude 'Pending' Status

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.