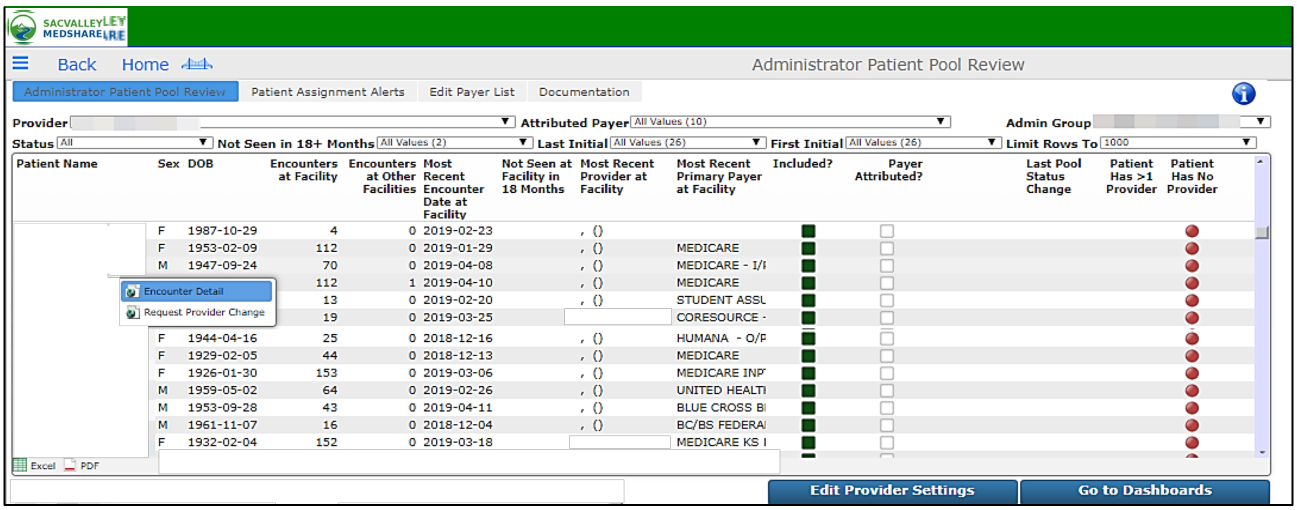
Dashboard User: **Administrator Patient Pool Tile**

ADMINISTRATOR PATIENT POOL REVIEW
The Administrator Patient Pool Review is a collection of pages that allow a Practice Administrator to manage patient attribution for providers within their practice.

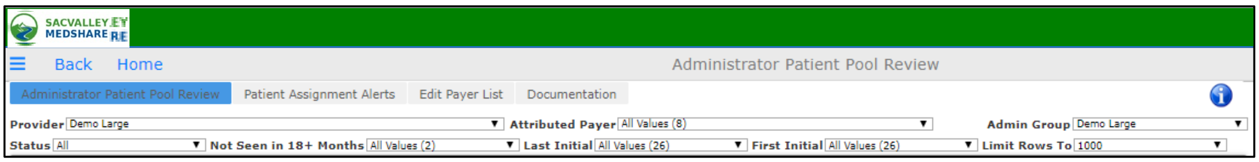


Administrator Patient Pool Review
The patient Pool Review tab shows a list of patients that are in the logged-in administrator's security group. It also allows the Practice Administrator to review the patient lists for individual providers. Practice Administrators can exclude and re-include patients from a provider's pool (only when they are viewing a single provider's patient list as set by the Provider quick view). Practice Administrators can also submit a provider change request for a patient to SVMS.

The display lists the following fields for each of the patients:

- **Basic demographics**: Name, DOB and Gender
- **Encounters at Facility** - count of the patient's visits within the client's facilities.
- **Encounters at Other Facilities** - count of the patient's visits outside of the client's facilities.
- **Most Recent Encounter Date at Facility** - the date of the patient's last visit within the client's facilities.
- **Not Seen at Facility in 18 Months** - a red indicator marks any patient that has not had a visit with the client in the last 18 months; otherwise, it is blank.
- **Most Recent Provider at Facility** - the latest provider's name available on the patient's visits.
- **Most Recent Primary Payer at Facility** - the latest primary name available on the patient's visits within the client facilities.
- **Included?** - a checkbox indicating if the patient is included in (dark green) or excluded from (white) a provider's or administrator's view.

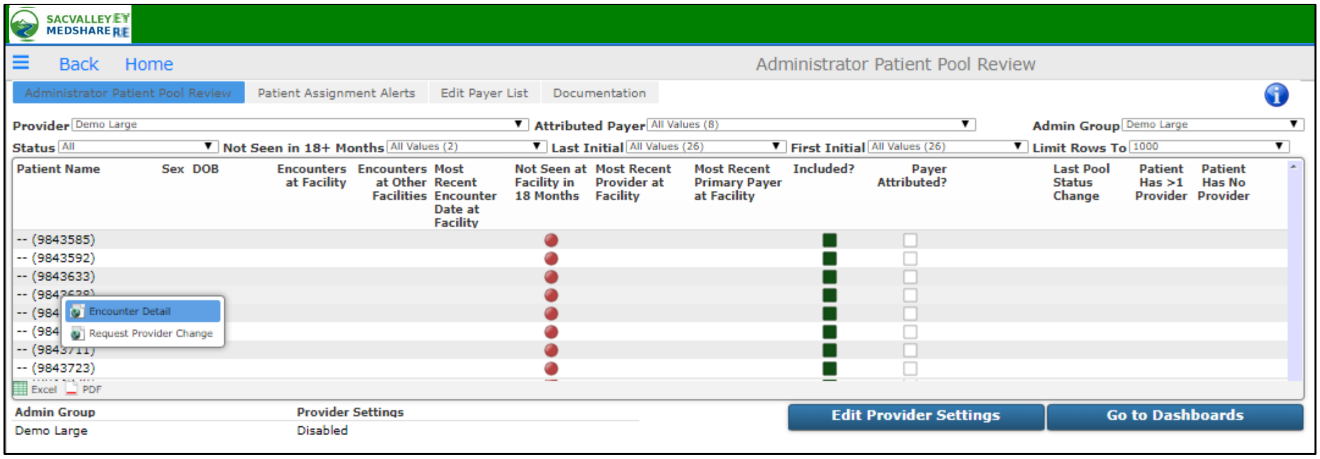
- **Payer Attributed?** - a checkbox indicating if a patient has been marked as payer attributed. This checkbox is white by default, and green if a Practice Administrator has attributed a payer to the patient. The setting is practice/client-wide, and not on a per-provider basis
- **Last Pool Status Change** - the date and time of the last edit to a patient's Included/Excluded status
- **Patient Has >1 Provider** - a circular red alert displayed for any patient that has been assigned to more than one provider within the client/practice.
- **Patient Has No Provider** - a circular red alert displayed for any patient that has not been assigned to a provider



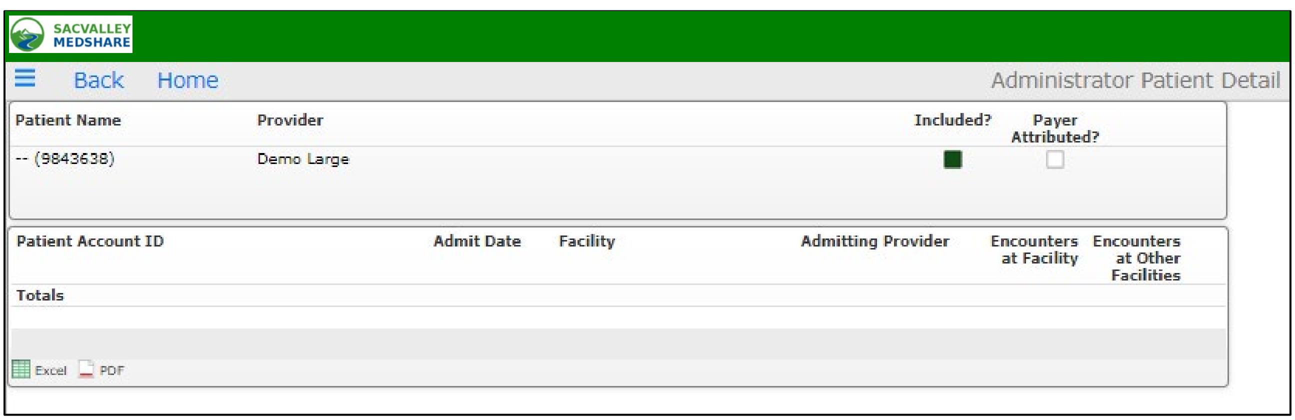
Filters

The Patient Pool report can be filtered by the following:

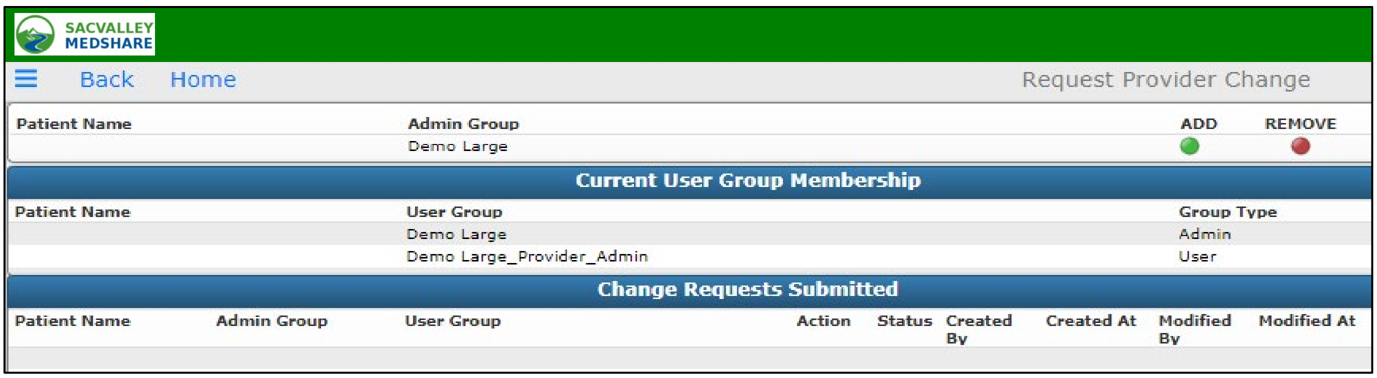
- **Status** - filters the report to show only Included patients, only Excluded patients, or All patients (default) for the provider.
- **Attributed Payer** - filters the report to only those patients that a Practice Administrator has marked as attributed to a particular payer. The default is to show all patients.
- **Not Seen in 18+ Months** - filters the report to show only those patients for which the condition is True or False. The default settings show all patients.
- **First Initial** - filters the report to only patients whose first initial starts with the selected character. The default settings show all values.
- **Last Initial** - filters the report to only patients whose last initial starts with the selected character. The default settings show all values.
- **Limit Rows To** - sets the number of patients to view in the report. The default is 10



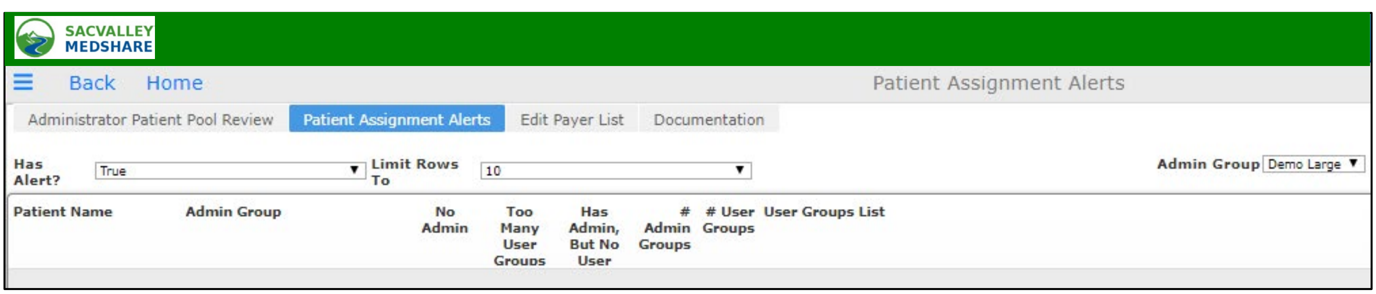
Patient Encounter Detail Click-Action - Clicking on any non-indicator column for a patient in the Patient Pool report pops up a new page with the Encounter Detail report for the selected patient. The page shows the patient name, the selected administrator or provider security group, and the Included. status (which can be edited if a provider security group was selected), the Payer Attributed? status for the patient (which can be edited if the administrator group was selected), and a list of all the encounters for the patient.



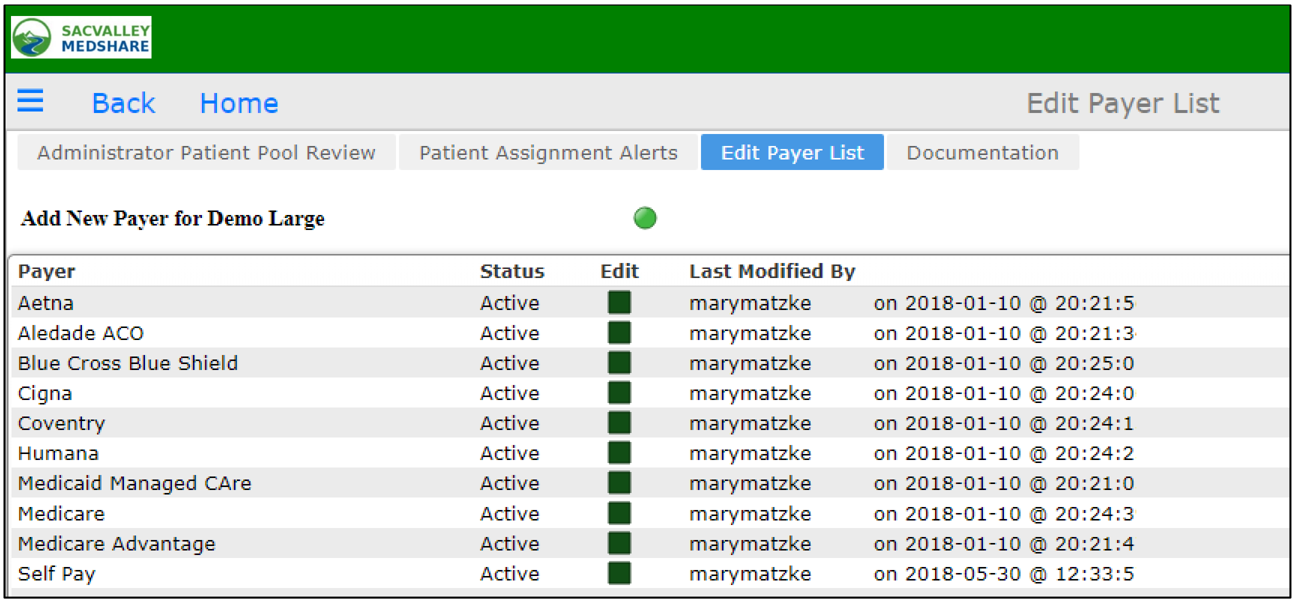
Request Provider Change - Clicking on any patient in the Patient Pool report allows the user to select the Request Provider Change menu item. This navigates to a new page that lists all the security groups the selected patient has been assigned to. A round green Add allows a user to request a new provider security group assignment for the patient. A round red Remove allows a user to request that a patient be removed from a provider security group. The page also shows a list of all the Add and Remove requests that have been submitted for the patient.



Patient Assignment Alerts: shows alerts for any patients within the client that have issues with their security group assignments.



Edit Payer List: shows the list of payers that can be attributed to patients, and allows the Practice Administrator to edit the list by adding new Payers, editing existing Payers, or disabling an existing Payer. (Note: disabled Payers will not show up as options when editing Payer Attributed for a patient, but they are not deleted so as to be able to report on report on any patients that still have those disabled payers attributed.)



Payer	Status	Edit	Last Modified By	
Aetna	Active		marymatzke	on 2018-01-10 @ 20:21:5
Aledade ACO	Active		marymatzke	on 2018-01-10 @ 20:21:3
Blue Cross Blue Shield	Active		marymatzke	on 2018-01-10 @ 20:25:0
Cigna	Active		marymatzke	on 2018-01-10 @ 20:24:0
Coventry	Active		marymatzke	on 2018-01-10 @ 20:24:1
Humana	Active		marymatzke	on 2018-01-10 @ 20:24:2
Medicaid Managed CAre	Active		marymatzke	on 2018-01-10 @ 20:21:0
Medicare	Active		marymatzke	on 2018-01-10 @ 20:24:3
Medicare Advantage	Active		marymatzke	on 2018-01-10 @ 20:21:4
Self Pay	Active		marymatzke	on 2018-05-30 @ 12:33:5

Edit Provider Settings Button - The current selection of whether the Provider Settings should be applied to the Practice Administrator's view of patients is displayed under the Patient Pool report.
Provider Settings=Disabled means the provider exclusions or assignments for patients have no effect on the administrator's view of the patients; Enabled means provider exclusions affect the administrator's view. The Edit Provider Settings button under the Patient Pool report takes the user to a page where the user can change the Provider Settings between Enabled and Disabled states. By default, Provider Settings are disabled for all clients.

Go to Dashboards - takes the user to the main menu for the data dashboards

<u>Interactive Features</u>

• **Included?** When a Provider's security group is chosen from the Provider Quickview, the patient list is limited to that Provider's patients. The Included checkbox becomes interactive on each patient's row, allowing the user to click on it and toggle the Included/Excluded status of that patient in the selected provider's view. The popup window that appears on a user click allows the user to select an Exclude Reason, and select OK to save the Inclusion/Exclusion edit. Editing the Include? checkbox status updates the Last Pool Status Change field also. **Note:** after changing the Include?

status for one or more patients, a user needs to log out and log back into the dashboards to see the new Included/Excluded settings affected on the data dashboards.

When the Administrator's security group is chosen from the Provider quickview, the patient list displays all patients within the practice/client. The Included? checkbox in this view is a display-only alert (green for included, white for excluded). Patient exclusions cannot be set explicitly for a Practice Administrator; they are determined by the exclusions set by all the providers that a patient is assigned to at the client. If Provider Settings for the client's Admin Group have been enabled, then any patient in the Practice Administrator's view that has not been assigned to a Provider group, or has been excluded by all Providers, will be deemed excluded for the Practice Administrator. If the Provider Settings for the client's Group have been disabled, then the Practice Administrator's view includes all patients assigned to the administrator, whether or not they are assigned to or excluded from Provider views.