

Analytical Dashboards User Guide

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Dashboard User Guide ACO Metrics Tile

ACO METRICS





ACO Metrics display the clinical quality measures required for Accountable Care Organization and Value Based Payment program reporting. Measures cover care coordination, patient safety, preventive health, and at-risk populations.



Dashboard User Guide ACO Metrics Tile





Preventive Care Records by Measure - Reporting Period Influenza Immunization ACO-14 HbA1c Poor Control ACO-27 Colorectal Cancer Screening ACO-19 Statin Drug Therapy ACO-42 Breast Cancer Screening ACO-20 © 50 100 150 200 250 300 "PC Records within metric period - see Appendix

Preventive Care Patients by Performance –Met displays a trend line comparison of last year to current month and year.

Preventive Care Patients by Performance displays a monthly summary of patients who have completed (Met) and those who have not (Not Med).

Preventive Care Records by Measure-selecting a bar from this chart will open up a patient list of details for each measure.

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Dashboard User Guide ACO Metrics Tile

Network Demo	arge T					Metric	Colorectal Canter Screenin	12 200-19		
Practice Dumo S	mail 🔻					Perfor				
						Period	Previous Reporting Period			
Patient Name	DOB	Sex	Ethnicity	Race	Activity Date	Most Recent Facility	Provider	Act Type	Act Desc	Record #
										2,311
2419429, PATIEN	01/18/1947	F			04/10/2015	Facility 2	MCKESEY, PAUL SCDI	Procedure	Colonoscopy - 73761001	1
2756219, PATIEN	12/10/1949	M		White	02/04/2016	Facility 2	MCKESEY, PAUL SCOL	Procedure	Lesion removal colonoscopy	1
2813193, PATIEN	03/31/1955	F		White	05/13/2016	Facility 2	MCKESEY, PAUL SCOL	Procedure	Colonescopy - 73761001	1
2876389, PATIEN	06/24/1948	F	Not Hisp	White	11/13/2014	Facility 2	MCKESEY, PAUL SCOI	Procedure	Colonoscopy - 73761001	1
3052543, PATIEN	12/01/1945	P		White	05/18/2015	Facility 2	MCKESEY, PAUL SCOL	Procedure	Colonoscopy and biopsy - 4531	1
3155956, PATIEN	01/18/1953	M			02/11/2017	Facility 2	NIGHTENGALE, DIAN	Procedure	Colonoscopy - 73761001	1
3187505, PATIEN	09/06/1954	F			04/15/2017	Facility 2	RAUSCH, MICHAEL SI	Procedure	Colonoscopy and biopsy - 4531	1
3278883, PATIEN	09/03/1964	F		White	08/21/2014	Facility 2	MCKESEY, PAUL SCDI	Procedure	Colonoscopy - 73761001	1
3352045, PATIEN	08/06/1954	F			11/14/2015	Facility 2	RAUSCH, MICHAEL SI	Procedure	Diagnostic colonoscopy - 4537	1
3409139, PATIEN	06/23/1954	M		White	03/18/2017	Facility 2	MCKESEY, PAUL SCDI	Procedure	Colonoscopy - 73761001	1
3469936, PATIEN	10/21/1959	F			10/03/2015	Facility 2	RAUSCH, MICHAEL S	Procedure	Colonoscopy - 73761001	1
3541062, PATIEN	03/08/1955	F	Not Hisp	Hispanic	04/20/2017	Facility 2	MCKESEY, PAUL SCOL	Procedure	Lesion removal colonoscopy	1
584399, PATIEN	11/10/1946	F			10/30/2015	Facility 2	MCKESEY, PAUL SCDI	Procedure	Colonoscopy - 73761001	1
629676, PATIEN	12/14/1958	F			11/28/2015	Facility 2	RAUSCH, MICHAEL SI	Procedure	Colonoscopy and biopsy - 4531	1
3593863, PATIEN	11/27/1948	M			12/15/2016	Facility 2	MCKESEY, PAUL SCOL	Procedure	Lesion removal colonoscopy	1

On demand reports identify patients for follow up to improve reported outcomes. At reporting time, organizations can directly export and upload their measure results, saving time and improving data completeness.



Administrator Patient Pool Tile

ADMINISTRATOR PATIENT POOL REVIEW

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.

E Dack	Hama	M					0.	duainisten	tor Dationt Deal I	Deview			
- Dack	Home	dents.					A	uministra	tor Patient Poor	Review			-
Administrator 9	Vallent Poo	Review Pa	atient Assignn	nent Alerts Edit Payer I	List Docu	mentation							
Provider					Y Attribut	ed Payer All Va	ues (10)		•	Admin Group			
Status All		Vot Se	en in 18+ Mo	onths All Values (2)	V Last	Initial All Values	(26)	First Initia	All Values (26)	T Limit Rows To	1000		-
Patient Name	Sex	DOB	Encounters at Facility	Encounters Most at Other Recent Facilities Encounter Date at Facility	Not Seen at Facility in 18 Months	Most Recent Provider at Facility	Most Recent Primary Payer at Facility	Included?	Payer Attributed?	Last Pool Status Change	Patient Has >1 Provider	Patient Has No Provider	ĺ
	F	1987-10-29	4	0 2019-02-23		. 0						۲	24
	F	1953-02-09	112	0 2019-01-29		. 0	MEDICARE					۲	
	84	1947-09-24	70	0 2019-04-08		+ 0	MEDICARE - 1/1					۲	
	and a	and Distance	112	1 2019-04-10		+ 0	MEDICARE					۲	
	M Encour	cer cecan	13	0 2019-02-20		. 0	STUDENT ASSL					۲	
	Reques	t Provider Change	= 19	0 2019-03-25			CORESOURCE -					۲	
	F	1944-04-16	25	0 2018-12-16		. 0	HUMANA - O/P		ō			Ó	
	F	1929-02-05	44	0 2018-12-13		. 0	MEDICARE		ā				
	F	1926-01-30	153	0 2019-03-06		. 0	MEDICARE INP		ō			۲	
	M	1959-05-02	64	0 2019-02-26		.0	UNITED HEALTH					۲	
	54	1953-09-28	43	0 2019-04-11		. 0	BLUE CROSS B		0			۲	
	м	1961-11-07	16	0 2018-12-04		, 0	BC/BS FEDERA					۲	
	F	1932-02-04	152	0 2019-03-18			MEDICARE KS I					۲	
Excel POF								-				-	-
								Edit	Provider Setting	Ge	to Dashb	oards	

Administrator Patient Pool Review

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 quickview). 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 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, blank otherwise.

• Most Recent Provider at Facility - the latest provider 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



Administrator Patient Pool Tile

• **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

Back Home		Adr	ninistrator Patient Pool Review		
damand later Renew From Re-	Patient Assignment Alerts Edit Payer	List Documentation			0
Provider Demo Large		Attributed Payer All Values (8)	*	Admin Group Demo Large	•
Status All	Not Seen in 18+ Months All Values (2)	 Last Initial All Values (26) 	 First Initial All Values (26) 	T Limit Rows To 1000	

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 show in the report. The default is 10



Administrator Patient Pool Tile

E Back	Home					Adn	ninistrato	r Patient Pool R	eview			
second to be	Patient Appl Represe	Patient Assignm	nent Alerts Edit Pay	er List Docu	mentation							0
Provider Demo L	arge			* Attribut	ed Payer All Va	lues (8)		•	Admin Group	Demo Large		
Status All	▼ No	t Seen in 18+ Mo	onths All Values (2)	¥ Last	Initial All Values	(26)	First Initia	All Values (26)	T Limit Rows Te	1000		
Patient Name	Sex DOB	Encounters at Facility	Encounters Most at Other Recent Facilities Encounte Date at Facility	Not Seen at Facility in r 18 Months	Most Recent Provider at Facility	Most Recent Primary Payer at Facility	Included?	Payer Attributed?	Last Pool Status Change	Patient Has >1 Provider	Patient Has No Provider	*
(9843585)				۲								
(9843592)												
(9843633)				۲								
(9842634)				۲								
(984 W Encu	unter Debel											
(984 💽 Requ	est Provider Change			۲			-					
(9843711)							-					
(9843723)							-					
Admin Group		Provider	Settings				Edit	Provider Setting	s G	to Dash	boards	
Demo Large		Disabled										

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, 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.

Back Hor	ne				Administ	rator Patient D
Patient Name	Provider			Included	? Payer Attribute	d?
(9843638)	Demo Large				Ц	
Patient Account ID		Admit Date	Facility	Admitting Provider	Encounters at Facility	Encounters at Other
Totals						Facilities
Excel POF						



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.

Back	Home				Request Pr	ovider C	hange
Patient Name		Admin Group Demo Large				ADD	REMOVE
		Current	User Group Membership				
Patient Name		User Group Demo Large Demo Large Brovider Admin				Group 1 Admin	ype
		Chan	ge Requests Submitted			User	
Patient Name	Admin Group	User Group	Action Statu	s Created By	Created At	Modified By	Modified At

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

S.	ACVALLE	Y E						
≡ ε	Back	Home					Patient Assignm	nent Alerts
Admini	istrator Pa	atient Pool Review	Patient Assignment Aler	ts Edit	Payer List	Docur	mentation	
Has Alert?	True		To Limit Rows	10				Admin Group Demo Large 🔻
Patient N	Name	Admin Group	No Admin	Too Many User Groups	Has Admin, But No User	# Admin Groups	# User User Groups List Groups	



Dashboard User Guide Administrator Patient Pool Tile

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.)

≡ Back Home				Edit Payer List
Administrator Patient Pool Review	Patient Assignme	ent Alerts	Edit Payer List	Documentation
Add New Payer for Demo Large		۲		
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 of assignments for patients have no effect on 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

Edit Provider Settings Go to

Go to Dashboards

Interactive Features

• 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 in to the dashboards to see the new Included/Excluded settings effected 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.



ALERTS



Know when your patient has a visit somewhere else in real-time!

Starting in Spring of 2021 (twelve months after the publication of the final rule), CMS's Medicare CoPs for hospitals and CAHs will require that they send electronic patient ADT event notifications to other health care facilities or community providers. Alerting reduces readmissions (inside and outside of your system) and avoidable ED visits, improves the quality of care for at-risk patients during transitions of care, and reduces overall healthcare costs.

- The AcuteAlerts notification includes the patient's name, the treating provider's name, sending institution's name and admit, transfer and discharge date and time, meeting CoP requirements.
- The AcuteAlerts is sent electronically to the patient's care provider/practice, applicable postacute care provider, or other providers identified by the patient.
- Provider(s) are notified by email that they have received an AcuteAlerts for their patient. They are directed to a secure website to view the patient information. The Admission, Discharge and Transfer (ADT) feed from the hospital is utilized to electronically identify patients and alert their providers.
- AcuteAlerts provides the alerts in near real-time by leveraging existing capabilities in the SacValley MedShare health information exchange platform.
- AcuteAlerts inform transitions of care in clinical workflow, so care teams can proactively engage and monitor patients after they are discharged from the hospital or admitted to an ER.
- Alerts can be delivered to a patient's established PCP, established primary care practice group, or other practitioners/groups identified by the patient as primarily responsible for his or her care.

Home			Pat	ient Alerts				
Archive Patient Visits View Archived Visits						Patie	nt Total 90	0
tient Last Patient First Patient Phune Number Date of Birth Gender Patient ID	Admit Source	Admit Date	Patient Type	Medical Service	Discharge	Discharge Disposition Sending Facility	Patient	Accine
Les Dance		2020-04-12	Emergency	_				<u> </u>
		2020-04-22	Emergency		3020-04-22	1		
		2020-04-22	Emergency		The second second			
		2020-04-22	Emergency					
		2820-04-22	Inpatient.		and the second s			
		2020-04-31	Emergency		3030-04-21			
		2020-04-21	Emergency		2020-04-21			
		2020-04-21	Emergency		2020-04-21			
		2020-04-21	Emergency		2020-04-21			
		2020-04-21	Emergency		2020-04-21			
		2020-04-31	Inpatient		100000000000000000000000000000000000000			
		2520-04-21	Emergency		2020+04+21			
		2020-04-31	Emergency		2020-04-21			
		2020-04-21	Emergency					
		2020-04-20	Inpatient					
		2020-04-20	Inpatient					
		2626-64-20	Inpatrinot					
		2020-04-20	Tubacient		-			
		2020-04-20	Inpapient		3030-04-30	a second s		
		2020-04-20	Intergency		2020-04-20			

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Dashboard User Guide Appendix Tile

APPENDIX TILE



Appendix provides brief reference and description of criteria used for each condition and measure reported on the various dashboards.

Back	Home					Appendix
Category Type measure measure	y Breast Cancer Screening ACD-20 ▼ High Risk Condition Lab Value Greater Than Lab Val NO YES _specific_a 🌑 🧼	lue Less Tha	m		605,340	Example from Appendix of criteria for ACO 20 Breast Cancer Screening
	ICD and Procedure Code List	Gender	Age Start	Age End	Duration (in months)	
	Diagnosis Codes					Inclusion Criteria: CPT
						and HCPCS codes for
					-	Screening Mammograms
inclusion	Codes 77061, 77062, 77053, 60202, 60204, 60206	F	50	74	24	Females, ages 50-74
						Duration: Every 24
						months
-				-		
	Diagnosis Codes					Exclusion criteria lists
	PDF					codes for Breast Cancer,
-						previous breast
Exclusion	Codes	F, M				surgeries.
	12275171000119100, 12275221000119100, 13607100119101					
	137671000119105, 137681000119108, 14693006, 14714006 17066001, 172043006, 19180, 19200, 19220, 19240, 19303, 19304,					Printer Friendly Version
	19305, 19305, 19307, 22418005, 22664005, 237367005, 237365004, 237385002, 237385002, 24028007, 24028007, 24802006, 274957008.		-			available in PDF or Excel
	128/3005 1812/0008 1853/9003 185/6008 185/62000					
	185463005, 185464004, 185465003, 185465002, 185467006, 185466001, 185470005, 19681004, 207195004, 225929007,					Code export available in
	270427003, 270430005, 308335008, 315205008, 3391000175108, 390906007, 406547008, 439708005, 439740005, 698704008, 704126008, 87790002, 90526000, 99201, 99202, 99203, 99204, 99205, 99214, 99214, 99215, 99244, 99245, 99243, 99245, 99255, 9925					each section via mouse
Metric Refer	ence: ACO-20		Printe	er Frier	Idly Version	
						Metric Reference lists
						source for standards and

codes.



BEHAVIORAL HEALTH



Behavioral Health measures are structured to track screenings for patients with serious mental illness conditions of bipolar disorder, schizophrenia, and depression. Each measure has specific requirements available for review in the Appendix.

Performance displays three categories of calculation.

<u>Met</u> - The patient has fallen into both the numerator and denominator requirements including any office visit criteria.

<u>Not Met</u> - The patient meets the denominator criteria and has eligible office visits during the measurement period, but no evidence of the screening completed.

<u>Unreported</u> - The patient meets requirements for the metric, but does **not** have the required office visit.

Period identifies the reported timeframe.

<u>Current</u> - This is the current calendar year. <u>Previous</u> - This is the previous calendar year. <u>Historical</u> - This is anything prior to the 'Previous Reporting Period' time frame









atien! List								Patient List example from Recor by Measure . This shows			
Facility All Values (16)					Metr	C Diabetes Care with Serie Adult Suicide Assessmen Child Suicide Assessmen	us Mental Illness 🔻 It t	Performance MET for Diabetes Care with Serious Mental Illness			
Patient Name	DOB	Sex	Ethnicity	Race	Perio Activity Date	Hypertension MGMT in S Tobacco Use Screening a Most Recent Facility	erious Mental Illness and Cessation	Act Type	Act Desc		
819969, PATIEN	01/17/1966	м		White	06/17/2017	Facility 13	Lab	Lab	HBA1C - 10.7		
216119, PATIEN	06/21/1962	F			07/30/2017	Facility 13	Lab	Lab	HBA1C - 14.4		
522420, PATIEN	09/28/1956	М		White	04/20/2017	Facility 11	Lab	Lab	HEMOGLOBIN A1C - 9.1		
350022, PATIEN	06/26/1956	F	Not Hisp	White	02/28/2017	Facility 8	Lab	Lab	HEMOGLOBIN A1C - 9.1		
866411, PATIEN	12/02/1969	М		White	06/25/2017	Facility 1	Lab	Lab	HEMOGLOBIN A1C - 9.2		
589776, PATIEN	01/08/1963	F		White	03/01/2017	Facility 5	Lab	Lab	HEMOGLOBIN A1C - 9.2		
1874282, PATIEN	03/30/1968	F		White	09/01/2017	Facility 7	Lab	Lab	HEMOGLOBIN A1C - 9.2		
1776707, PATIEN	11/13/1972	F		White	06/10/2017	Facility 8	Lab	Lab	HEMOGLOBIN A1C - 9.4		
1701114, PATIEN	11/03/1972	F			09/04/2017	Facility 15	Lab	Lab	HEMOGLOBIN A1C - 9.4		

Behavioral Health Patients by Performance - Met 40 35 30 25 20 15 10 5 0 M Μ 1 J A s 0 D A N Cur 12 Months Prev 12 Months

Trend line comparison between current and previous years



Displays eligible office visits performance month to month current year.

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530.258.2544



View of the patient detail report from the BH Patients by Performance chart. It lists patient names, date of birth and office visit date with visit description and location. Performance Met compliance require patients have an eligible face to face encounter during the measurement period in addition to the appropriate screening or assessments.

Facility All Values	(16) 🔻				Metric D	abetes Care with Serious Mental Illness	9. T	
Month 2017-08	- 17				Perfor	dult Suicide Assessment hild Suicide Assessment		
Office Visit Faci	lity All Values	(16) 🔻			Period	iabetes Care with Serious Mental Illnes	S	
					H	ypertension MGMT in Serious Mental Illi	ness.	
Patient Name	DOB	Sex Ethnicity	Race	Performance	Office Visit Dat	e Visit Desc	Office Visit Facility	
186075, PATIEN	03/30/1994	F	White	Met	08/04/2017	Office or other outpatient visit	Facility 6	
258215, PATIEN	06/25/1996	м	White	Met	08/18/2017	Office/outpatient visit, est, lev	Facility 2	-
421195, PATIEN	03/18/2000	F		Met	08/13/2017	Office or other outpatient visit	Facility 2	
485252, PATIEN	02/16/1953	F	White	Met	08/21/2017	Office/outpatient visit, est, lev	Facility 12	
547610, PATIEN	01/08/1995	F	White	Met	08/04/2017	Office or other outpatient visit	Facility 15	
1654625, PATIER	11/06/1964	M	White	Met	08/28/2017	Office or other outpatient visit	Facility 7	
1659820, PATIE	02/05/1963	M	White	Met	08/28/2017	Office/outpatient visit, est, lev	Facility 2	
1746800, PATIEN	12/19/1994	М		Met	08/28/2017	Office or other outpatient visit	Facility 4	
2000648, PATIE	08/08/1981	F		Met	08/07/2017	Office or other outpatient visit	Facility 6	
2046816, PATIEN	04/18/1988	F	White	Met	08/20/2017	Office/outpatient visit, est, lev	Facility 1	
2502226, PATIE!	09/13/1995	F	White	Met	08/14/2017	Office or other outpatient visit	Facility 10	

Filter options include Facility, Month, and Office Visit Facility.



Dashboard User Guide Controlled Substances Tile

CONTROLLED SUBSTANCES



CONTROLLED SUBSTANCES

The Controlled Substances Dashboard is a collection of pages that display medications ordered and administered to the client population. The medications displayed are separated by **Controlled Substances** and Opioid **Medications**. Tabs for Emergency, Inpatient, Outpatient and Other filter the views based on patient visit type. Default is **All** visit types.

Total Population: the number of patients in the client population.

Schedule II Population: the number of patients in the client population who have received at least one medication (ordered or administered) in the Controlled Substances category.

Overlapping Opioid Prescriptions: the number of patients in the client population who have received Opioid medications (ordered or administered) that overlap each other.

Eligible Opioid Medication Names

Any Medications that contain one of these values is considered as an Opioid Medication.

-morphine -methadone -codeine -meperidine -opium -oxycodone -hydromorphone -fentanyl

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Eligible Controlled Substance Names

Any Medications that contain one of these values is considered a Controlled Substance, in addition to the Opioid Medications listed.

- amphetamine glutethimide
- methamhetaminepentobarbital
- methylphenidate
- idate cocaine

- amobarbital

Chart Overviews



Controlled Substances Prescription Distribution

Breaks out the Controlled Substances medication distribution by Facility and Date Range.

Overlapping Opioid Medications Rolling 12 Months

Shows a distribution of the Overlapping Opioid Medication populations broken down by the rolling 12 months.

Multiple Overlapping Facilities in last 12 Months

Shows Number of patients with medications from multiple facilities within past 12 months.



Dashboard User Guide Controlled Substances Tile



Opioid Prescription Distribution: breaks out the Opioid medication distribution by Facility and Date Range of prescription.

Overlapping Opioid Medications by Facility: shows a distribution of the Overlapping Opioid Medication populations broken down by Facility



TOP 5 OPIOID MEDICATIONS PRESCRIBED: shows a distribution of the top Opioid medications administered by the client.



Dashboard User Guide Controlled Substances Tile

Consistent with all dashboard charts, clicking within a chart summary opens a patient specific list. Fields displayed depend on the parameters used in the summary display.

MEDSHARE							
Back Home						Patient List - Facility - Outpatient	Print
Facility Facility 2 v Date Range 6 Month v							
# Name	DOB	Sex	Ethnicity	Race	Facility	# of Prescriptions/Administered	
81		1			-	302	
1 1977380, PATIENT	03/19/1968	F	Not Hisp	Black or	Facility 2	35	
1 3788380, PATIENT	08/16/1950	M			Facility 2	17	
1 9643599, PATIENT	05/25/1957	М			Facility 2	15	
1 1665369, PATIENT	12/03/1941	M			Facility 2	14	
1 4146494, PATIENT	11/08/1934	F		White	Facility 2	13	
1 729942, PATIENT	04/02/1973	F	Not Hisp	Black or	Facility 2	12	
1 4054981, PATIENT	11/11/1976	M			Facility 2	10	
1 3617090, PATIENT	10/20/1964	F			Facility 2	9	
1 682502, PATIENT	03/01/1976	F			Facility 2	8	
1 4235386, PATIENT	01/12/1954	М		White	Facility 2	8	
1 846567, PATIENT	06/04/1961	F	Not Hisp	Black or	Facility 2	7	
1 4613291, PATIENT	10/11/1967	F			Facility 2	7	

Within patient lists, one can select an individual patient and drill down to display medication details.

Back	Home					1	Prescription Detail Page - Outpatient
r	-						
Facility	inty 2 •						
Patient Na	me 9643599	PATIEN	TX	Date Range 6 Month			
# Provider	Facility C	ode	Name		Start Date	Stop Date	Dosage
1	Facility 2 2	14100	Anthenderschung 205 MC	/ Hudeney days playtophe 7 5 MC Out	To 2018 08 24	1010 00 DE	0.0042
1	LOUNCY Z Z	14102	Acelaminophen 325 MG	/ Hyurocouone Bitaru'ate 7.5 MG Orat	1d 2010-00-24	2010-09-03	
2,	Facility 2 2	14182	Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-10	2018-09-03	
2,	Facility 2 2 Facility 2 2	14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10	2018-09-03 2018-08-22 2018-08-24	
2 / 2 / 3 / 4 /	Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2	14182 14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10 Ta 2018-08-05	2018-09-03 2018-08-22 2018-08-24 2018-08-10	
1, 2, 3, 4, 5,	Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2	14182 14182 14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10 Ta 2018-08-05 Ta 2018-07-22	2018-09-03 2018-08-22 2018-08-24 2018-08-10 2018-08-05	
1, 2, 3, 4, 5, 5,	Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2 Facility 2 2	14182 14182 14182 14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10 Ta 2018-08-05 Ta 2018-07-22 Ta 2018-07-08	2018-09-03 2018-08-22 2018-08-24 2018-08-10 2018-08-05 2018-07-22	
1 2 3 3 4 7 5 7 7	Facility 2 2 Facility 2 2	14182 14182 14182 14182 14182 14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10 Ta 2018-08-05 Ta 2018-07-22 Ta 2018-07-08 Ta 2018-06-24	2018-09-03 2018-08-22 2018-08-24 2018-08-05 2018-08-05 2018-07-22 2018-07-08	
1, 2, 3, 4, 5, 6, 7, 8,	Facility 2 2 Facility 2 2	14182 14182 14182 14182 14182 14182 14182 14182 14182	Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG Acetaminophen 325 MG	/ Hydrocodone Bitartrate 7.5 MG Oral / Hydrocodone Bitartrate 7.5 MG Oral	Ta 2018-08-24 Ta 2018-08-10 Ta 2018-08-10 Ta 2018-08-05 Ta 2018-07-22 Ta 2018-07-08 Ta 2018-06-24 Ta 2018-06-10	2018-09-03 2018-08-22 2018-08-24 2018-08-10 2018-08-05 2018-07-08 2018-07-08 2018-05-24	

Selection of the All Patient Medication button, available in the Overlapping Patient List, displays all medications on record for the patient for all patient types and dates.

Back	ARE Home					()verlappir	ng Pres	cription Detail Page - Al	L	
Facility All V	alues (16) 🔻]		ALL PAT	ENT MEDIC	ATIONS]				
Patient Nan	ne 37607, P	ATIENT V Patie	nt DOB 1976/01/26 ¥								
# Provider	Facility	Code	Name	Start Date	Stop Date	Day of Week	Time of Day	Dosage	Occurrence	Pat Type	Packaging Route
1,	Facility 6	214182	Acetaminophen 325 MG / Hydrocodor	2017-02-18		Sat	11	1		Inpatient	
2,	Facility 6	00179011320	Hydrocodone Bit/Acetaminophen 5 M	2017-02-18		Sat	05	1 TAB	Q4-6PRN	Inpatient	
3,	Facility 6	214183	Acetaminophen 325 MG / Oxycodone	2016-07-18		Mon	11	1		Inpatient	
4,	Facility 6	214183	Acetaminophen 325 MG / Oxycodone	2016-07-18	2017-02-17	Mon	11	1		Inpatient	
5,	Facility 6	63481062370	Oxycodone HCl/Acetaminophen 5 MG	2016-07-18		Mon	04	1 TAB	Q4	Inpatient	
6											D.
5			8								
4			6								
2			4								
1			2	1	1		-				
0	Man	Sat	0	5-8am		Sam-Son					



Controlled Substances Tile

Back	Home						Overlapping - All Meds P	Pat List - ALL	Print
Patient Nam	e 37607. PAT	TENT .							
# Provider	Facility	Code	Name	Start Date	Stop Date	Dosage	Occurrence Packaging Route	Pat Type	
59 ,	Facility 6	214183	Acetaminophen 325 MG / Oxycodone I	2017-07-24		1		Inpatient	
42 ,	Facility 6	1008340	Docusate Sodium 50 MG / sennosides,	2017-02-18		1		Inpatient	
31 ,	Facility 6	00143203701	Ciprofloxacin 500 MG	2016-10-28		500 MG	BID	Inpatient	
43 ,	Facility 6	00179011320	Hydrocodone Blt/Acetaminophen 5 MC	2017-02-18		1 TAB	Q4-6PRN	Inpatient	
49 ,	Facility 6	00406051262	Oxycodone/Acetaminophen 5 MG-325	2017-03-06		1-2 TABLET	Q4-6PRN	Inpatient	
16 ,	Facility 6	00440162830	Ibuprofen 800 MG	2016-07-18		800 MG	PRN	Inpatient	
26 /	Facility 6	00517003125	Cyanocobalamin 1000 MCG/ML	2016-10-21		1000 MCG	UNSURE	Inpatient	
44 .	Facility 6	00536355601A	Cyanocobalamin 1000 MCG	2017-02-18		1000 MCG	DAILY	Inpatient	
45 .	Facility 6	10939023211	Ferrous Sulfate 325 MG (65 MG IRON)	2017-02-18		1 CAP	DAILY	Inpatient	
46 ,	Facility 6	41163062962	Sennosides/Docusate Sodium 8.6 MG-	2017-02-18		1 EACH	DAILY	Inpatient	
32 ,	Facility 6	57664037708	Tramadol Hcl 50 MG	2016-10-28		50 MG	Q6-8PRN	Inpatient	
17 ,	Facility 6	63481052370	Oxycodone HCI/Acetaminophen 5 MG-	2016-07-18		I TAB	04	Inpatient	

Patient List Tab provides option to search by patient name to view all medication history, controlled substances only, or non-controlled substance medications.

васк	110.000								0.0
Parent	Home	3					Patient Medication C	ount	Pri
Overview	Overl	apping Patient List	Patient Lis	t					
PI atient Nan	All Value	as (63180) Q				Cont	rolled Substance Medicat	ion Yes	
Jucine Hum	Tephi Value	13 (40100)						All Values (2)	
# N	lame		DOB	Sex	Ethnicity	Race	Total Medications	No	
21.448							172,214	The second se	
4	710265.	ATTENT	01/22/1947	F			298	Yes	
4	625655. F	ATIENT	09/19/1955	M			406		
2	752707, F	ATIENT	01/05/1946	M			452		
19	978846, F	ATIENT	02/24/1959	F			317		
19	977380, F	ATIENT	03/19/1968	F	Not Hisp	Black or	462		
19	949889, F	ATIENT	05/07/1959	М		Black or	327		
18	833101, F	ATIENT	08/21/1950	F			339		
13	346141, F	ATIENT	09/24/1964	M			421		
13	209322, P	ATIENT	12/25/1965	F			358		
8	57687, PA	TIENT	01/02/1967	F			295		
7	29942, PA	TIENT	04/02/1973	F	Not Hisp	Black or	369		
69	93315, PA	TIENT	07/12/1948	F		Black or	323		
61	82502, PA	TIENT	03/01/1976	F			600		
5	10975, PA	TIENT	04/03/1972	F		Black or	642		
40	64445, PA	d IENT	02/24/1939	7	_	White	317		
SACVALLEY	Y E								
Deels	llama				Dali	and Merel	cotion Datall		
DACK	Home				Pdu	ent meu	cauon Detail		
tient Name	e 561727, P	ATIENT Y Patient DO	B 01/06/1961 ¥	í.			Controlled Substance M	edication All Values (2) Y	
tient Name + Provider	e 561727, P Code	ATIENT • Patient DO	B 01/06/1961 ▼	s	tart Die	Stop Date	Controlled Substance M Dosage Occurrence	edication All Values (2) Y	Packaging Route
tient Name F Provider	e 561727, P Code 2047882	Name 1 ML testosterone cy	B 01/06/1961 ¥	s 5/t 2	tart DLe 018-08-27	Stop Date 2018-08-2	Controlled Substance M Dosage Occurrence 7 200	edication All Values (2) Y	Packaging Route
tient Name Provider	e 561727, P Code 2047882 15996	Name 1 ML testosterone cy Mirtazapine 30 MG 0	B 01/05/1961 ▼ pionate 200 MC ral Tablet	5/t 2	tart Dive 018-08-27 018-08-26	Stop Date 2018-08-2	Controlled Substance M Dosage Occurrence 7 200 30	edication All Values (2) 🔻	Packaging Route
tient Name	e 561727, P Code 2047882 15996 15996	Name 1 ML testosterone cy Mirtazapine 30 MG O Mirtazapine 30 MG O	B 01/05/1961 V pionate 200 MC ral Tablet ral Tablet	S 5/1 2 2 2	tart DLye 018-08-27 018-08-26 018-08-13	Stop Date 2018-08-2 2018-08-2	Controlled Substance M Dosage Occurrence 7 200 30 5 30	edication All Values (2) 🔻	Packaging Route
tient Name	e 561727, P Code 2047882 15996 5032 2047892	ATTENT Patient DO Name 1 ML testosterone cy Mirtazapine 30 MG 0 Guaifenesin 200 MG 0 Guaifenesin 200 MG	Bi 01/06/1961 V pionate 200 MC ral Tablet ral Tablet Oral Tablet	5 5/1 2 2 2 2	tart DLye 018-08-27 018-08-26 018-08-13 018-07-28	Stop Date 2018-08-2 2018-08-2	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 9 200	edication (All Values (2) Y	Packaging Route
tient Name	e 561727, P Code 2047882 15996 15996 5032 2047882 15996	ATTENT * Patient DO Name 1 ML testosterone cy Mirtazapine 30 MG O Guaifenesin 200 MG 1 ML testosterone cy Mirtazapine 30 MG O	BI 01/05/1961 V pionate 200 MC ral Tablet ral Tablet Oral Tablet pionate 200 MC ral Tablet	5/1 2 2 2 2 5/1 2	tart Dive 018-08-27 018-08-26 018-08-13 018-07-28 018-07-28 018-07-28	Stop Date 2018-08-2 2018-08-2 2018-08-2 2018-07-2 2018-08-1	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 8 200 3 30	edication (All Values (2) Y)	Packaging Route
tient Name	e 561727, P Code 2047882 15996 15996 5032 2047882 15996 6470	ATIENT Patient DO Name I. ML testosterone cy Mirtazapine 30 MG 0 Mirtazapine 30 MG 0 Guaifenesin 200 MG I. ML testosterone cy Mirtazapine 30 MG 0 Lorazepane 0.5 MG 0 Lorazepane 0.5 MG 0	Bio1/05/1961 ▼ pionate 200 MC ral Tablet Oral Tablet pionate 200 MC ral Tablet ral Tablet	5/1 2 2 2 2 5/1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	tart D. e 018-08-27 018-08-26 018-08-13 018-07-28 018-07-28 018-07-28 018-07-26	Stop Date 2018-08-2 2018-08-2 2018-07-2 2018-07-2	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 8 200 3 30	edication (All Values (2) 💌	Packaging Route
tient Name	e 561727, P Code 2047882 15996 15996 5032 2047882 15996 6470 2047882	ATIENT Patient DO Name I ML testosterone cy Mirtazapine 30 MG 0 Mirtazapine 30 MG 0 Guaifenesin 200 MG Untazapine 30 MG 0 Lorazepam 0.5 MG 0 I ML testosterone cy	B 01/05/1951 ▼ pionate 200 MG ral Tablet oral Tablet Oral Tablet pionate 200 MG ral Tablet ral Tablet pionate 200 MG	5/1 2 2 2 5/1 2 2 5/1 2 2 5/1 2	tart D. e 018-08-27 018-08-26 018-08-13 018-07-28 018-07-28 018-07-28 018-07-16	Stop Date 2018-08-2 2018-08-2 2018-07-2 2018-07-1 2018-07-1	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 8 200 3 30 5 200 5 200	edication (All Values (2) Y)	Peckaging Route
tient Name # Provider 1 2 3 5 5 5 5 5 5	e 561727, P Code 2047882 15996 15996 5032 2047882 15996 6470 2047882 6918	ATTENT Patient DO Name 1 ML testosterone cy Mirtazapine 30 MG 0 Mirtazapine 30 MG 0 Guaifenesin 200 MG 1 ML testosterone cy Mirtazapine 30 MG 0 Lorazepam 0.5 MG 0 1 ML testosterone cy 24 HR metoprolof su	BI 01/05/1961 V pionate 200 MG ral Tablet Oral Tablet Oral Tablet pionate 200 MG ral Tablet pionate 200 MG cinate 50 MG 6	5/1 2 2 2 5/1 2 2 5/1 2 2 5/1 2 2 5/1 2 2 5/1 2 2 5/1 2 2 5/1 2 2 5/1 2 2 2 5/1 2 2 2 5/1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	tart Dive 018-08-27 018-08-26 018-08-13 018-07-28 018-07-28 018-07-28 018-07-16 018-07-16 018-07-15	Stop Date 2018-08-2 2018-08-2 2018-08-2 2018-07-2 2018-07-1	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 8 200 3 30 5 200 5 200 50	edication (All Values (2) Y	Packaging Route
tient Name # Provider 1 2 3 4 5 5 7 3 4 7 3 3	e 561727, P Code 2047882 15996 5032 2047882 15996 6470 2047882 6918 7646	ATTENT Patient DO Name 1 ML testosterone cy Mirtazapine 30 MG O Guaifenesin 200 MG 1 ML testosterone cy Mirtazapine 30 MG O Lorazepam 0.5 MG O 1 ML testosterone cy 24 HR metoprolol su Omeprazole 40 MG D	B 01/05/1961 V pionate 200 MC ral Tablet ral Tablet Oral Tablet pionate 200 MC ral Tablet pionate 200 MC ral Tablet pionate 200 MC relayed Release	5/1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	tart Dive 018-08-27 018-08-26 018-08-13 018-07-28 018-07-28 018-07-28 018-07-16 018-07-15 018-07-15	Stop Date 2018-08-2 2018-08-2 2018-07-2 2018-08-1 2018-07-1	Controlled Substance M Dosage Occurrence 7 200 30 5 30 200 8 200 3 30 5 200 5 30 40	edication (All Values (2) Y)	Packaging Route



Dashboard User Guide COVID-19 Tile

COVID-19



The COVID tile allows for drilling down into your patient's or your county's population with COVID giving granular details into each patient and/or area as long as the user's access allows for that type of information.

State Public Health Reporting for COVID 19

Back	Home 4	+					My CO	VID+19 Patients			
COVID-10	Gverview	covito-se She Map	COVID-10 County	Map CO	VID-10 F	acility Countin	Hy COVID-19 Ratieske	Code = = 1) - 607.29 007.1 220.825		Patient Total 1,460	
Admit Date	Patient Type	Discharge Date	Discharge Disposition	Patient Age	Gender	Patient Ethnicity	Patient Race Sending Facility		Admitting Diagnosis Codes	Admitting Diagnosis Text	Admit Reason
2020-04-22	Outpatient		1	21	F	1135-1	2106-3		U07.1		
2020-04-22	Gutpatient			46	78	43	908		Z20.828		
2020-04-22	Outpatient	2020-04-23	V.	6E	F	NOT HISPANIC	White		220.826	Contact with and (suspected) exposure to	
2020-04-22	Outpatient		1	39	14	NOT HISPANIC	White		220.828	Contact with and (suspected) exposure to-	
020-04-22	Outpatient			75	F	NOT HISPANIC	White		007.1	COVID-15	007.1
20-04-22	Outpatient			48	H	NOT HISPANIC	white		U07.1	COVID-19	007.1
020-04-22	Outpatient			25	F	NOT HISPANIC	White		007.1	COVID-19	007.1
020-04-22	Outpatient			22	¥	NOT HISPANIC	Black		1/07.1	COVID-19	407.1
020-04-22	Outpatient			52	F	NOT HISPANIC	White		007.1	COVID-19	087.5
020-04-22	Outpatient			67	H	NOT HISPANIC	White		U07.1	COVID-19	007.3
020-04-22	Outpatient			43	F	NOT HISPANIC	Black		U07.L	CEVID-19	U87.1
020-04-22	Outpatient			41	98	NOT HISPANIC	white		L/D 7. L	COVID-19	007.1
020-04-22	Outpatient			40	Ē	NON	CA		007.1	COVID-19	
020-04-22	Outpatient	2020-04-22	4	46	F	NOT HISPANIC	White		U07.1	CGVID-19	
020-04-22	Outpatient	2020-04-23		50	N	NOT HISPANIC	White		007.1	COVID-13	Folloyeup
020-04-22	Outpatient			26	F		OTHER		220.826	CONTACT W AND EXPOSURE TO OTH VIRA	
020-04-22	Inplatient		DBS -	58	14	H	Other Race		007.1	COVID-19	Fever
020-04-22	Outpatient			46.	F		C		220.826	CONTACT W AND EXPOSURE TO OTH VIRA	LAB/ COVID 19
20-04-22	Gutpatient		-	30	Ē		c l		720.828	CONTACT W AND EXPOSURE TO OTH VIRA	LAB/COVID 19
020-04-22	Outpatient			45	F		ĉ		720.835	CONTACT W AND EXPOSURE TO OTH VIRA	LAB/COVID 19
020-04-21	Outpatient	2020-04-21		40	F	HDN	B		720.828	Contact with and (suspected) exposure to	

Physician Practice: Alerting with COVID 19

Home 44	Papent Werts						
Archive Patient Visits View Archived Visits	COVID	19 Patient Lis	2			Patient Total 90	6
ient Last Patient First Patient Phone Number Date of Birth Gender Patient ID	Admit Source	Admit Date	Patient Type	Medical Service	Discharge Date	Discharge Disposition Seniting Facility	Patienit Accin
		2020-04-12	Emergency				
		2020-04-22	Emergency		2020-04-22		
		2020-04-22	Emergency				
		2020-04-22	Emergency				
		2820-04-22	Inpatient				
		2020-04-31	Emergency		3030-04-21		
		2020-04-21	Emergency		2020-04-21		
		2020-04-21	Emergency		2020-04-21		
		2020-04-21	Emergency		2020-04-21		
		2020-04-21	Emergency		2020-04-21		
		2020-04-31	Inpatient				
		2820-04-21	Emergency		2020+04+21		
		2020-04-31	Emergency		2020-04-21		
		2020-04-21	Emergency				
		2020-04-20	Inpatient				
		2020-04-20	Inpatient				
		2020-04-20	Inpatient				
		2020-04-20	Inpatient				
	A CONTRACTOR OF	2020-04-20	Inpatient	A CONTRACTOR OF A	And And And And	The second se	
		2020-04-20	Emergency		2020-04-20		
		2020-04-20	inpatient k		2020-04-20		-



Dashboard User Guide Disease Registries Tile

DISEASE REGISTRIES



Disease registries display a list of patients in the population that meet the defined criteria. **This differs from High Risk** patients in that patients on this list may have only 1 condition and no Emergency Department activity.

Potential Use: Identify high population with certain high risk or "at risk" diagnoses or lab values. Currently criteria are listed in the selections. See the Appendix for ranges of codes.

- 1. A1c Poor Control are patients with a diagnosis of Diabetes and a lab value for Hemoglobin A1c that is 9% or greater.
- 2. A1c Range 5.7-6.4% criteria is patients without Diabetes and a lab value of Hemoglobin A1c in the defined range. It identifies "at risk" patients.
- 3. Acute Myocardial Infarction lists patients treated with a diagnosis of Acute MI as defined on the Appendix.



- 4. **BG 100-125** lists patients who are **not diabetic** and have a **blood glucose** within the 100-125 mg/dl range, another "at risk" for diabetes indicator.
- 5. **BG>125** displays **non-diabetic patients** with **blood glucose higher than 125 mg/dl**. Potentially at even higher "risk" for diabetes.
- 6. Diabetes: All patients in population with diagnosis of Diabetes.
- 7. Heart Failure: Patients identified with diagnosis of Heart Failure (see Appendix for specific codes)
- 8. Hypertension: Patients identified with Essential Hypertension
- 9. Ischemic Heart Disease: Patients diagnosed with ischemic heart disease condition.
- 10. **Pre diabetes:** List of patients who were diagnosed with certain **Pre-Diabetic diagnoses**, Impaired Glucose
- 11. Stroke Transient Ischemic Attack (TIA): Those with a diagnosed condition of Stroke or TIA in the patient population.
- 12. Tobacco User: Those with a confirmed diagnosis of Tobacco Use (does not include counseling).
- 13. Bipolar Disorder: Patients diagnosed with Bipolar Disorder.
- 14. Schizophrenia: patients in population diagnosed with Schizophrenia.

Patient Lists for each condition may be generated from the charts, selection from the available filters or use of the Patient List tab.

Back	Home						Patient List	ī				
Overview	Patient List	Disease Registries	Мар									
Facility A	Il Values (16) V					Patient Gender	All Values (2)	7	1			
Tucincy	active states (10)					Patient Age Group	All Values (2)	۷	Recent Reference Most Recent Time 2015-07-10 08:56:00 2016-08-27 13:31:00 2016-06-18 07:21:00			
						Disease Registries Condition	A1c Poor Control					
							All Values (15)					
	Namo	DOR	Cov	Ethnicity	Daca	Dationt Zin Eacility	A1c Range 5.7-6.4%		Recent Reference, Mart Recent Time			
* 37	37 30 1955759 Patient 12/07/1940 M Nr			Eunicity	Race	Patient Zip Facility	Acute Myocardial Infarction		Recent Reference Most Recent Time			
30				Not Hisp	White		Bipolar Disorder		2015-07-10 08:56:00			
12	722661 Patient	10/30/1961	F	Not Hisp	White	67901	Blood Glucose >125		2015-07-10-00.50.00			
16	1016354 Patient	01/05/1957	F	Not Hisp	white	67519	Diabetes		2016-06-18 07:21:00			
35	2230149 Patient	05/02/1954	M	Not Hisp		67623	Heart Failure		2016-08-21 09:11:00			
28	1819696 Patient	07/11/1953	M	Not Hisp	White	0,020	Hypertension		2015-05-21 16:37:00			
26	1658742, Patient	04/20/1968	M			67005	Prediabetes		2018-01-08 06:56:00			
1	122746, Patient	11/22/1979	F	Hispanic	White	67208	Schizophrenia		2015-07-16 18:36:00			
8	487561, Patient	04/20/1977	F	Not Hisp			Stroke / Transient Ischemic Tobacco User		2017-02-19 11:36:00			
20	1192492, Patient	04/16/1957	F	Not Hisp		66070	1	0.7	2016-06-11 16:22:00			
5	436854, Patient	06/03/1949	F	Not Hisp	White		1	0.9	2016-09-22 15:17:00			
21	1246756, Patient	06/29/1937	М	Not Hisp	White		1	0.9	2016-11-18 11:36:00			
31	1964607, Patient	09/10/1974	М	Not Hisp			1	0.9	2018-05-18 11:36:00			
10	577877, Patient	06/04/1975	М	Central			1	1	2015-02-18 10:44:00			
15	1011038, Patient	08/17/1950	F	Not Hisp			1	1.3	2016-10-07 15:32:00			



Dashboard User Guide Disease Registries Tile





HIGH RISK PATIENTS

High Risk Patient population: Those with 3 or more Chronic Disease Conditions AND 5 or more visits to ED in past 12 mos.



A CMS list of 27 chronic conditions is the reference. Hospital and clinic pilot participants helped refine the conditions down to the 17 displayed on dashboards. <u>https://www.ccwdata.org/web/guest/condition-categories</u>

- Alzheimer's Disease Asthma Atrial Fibrillation Bipolar Disorder Cancer Chronic Kidney Disease
- COPD Depression Diabetes Heart Failure Hyperlipidemia Ischemic Heart Disease

Osteoporosis Rheumatoid/Osteoarthritis Schizophrenia Stroke/Transient Ischemic Attack



Dashboard User Guide High Risk Patients Tile

PURPOSE: High Risk Patient dashboard identifies patients that could be considered most at risk for poor health outcomes, high resource utilization and in need of care coordination and management.



Chronic Conditions Distribution shows distribution of chronic conditions by color code. Hover over individual bar provides specific number of patients with that condition. Numbers will be greater than the number of patients due to multiple conditions/patient.



Clicking on any bar from the Chronic Conditions color chart opens a distribution of chronic diseases in a descending order of frequency for the population. Can be limited to 1 facility to note differences. NOTE: Facility with <u>most recent use</u> of the chronic diagnosis is identified as the source. PDF option available.

Selecting an individual condition from distribution chart opens a **patient list with that chronic condition.** List will retain selection from previous chart or can be filtered by **Facility** and **Chronic Condition** without returning to previous chart. **Total** number of patients with chronic condition displays in upper left of list. Columns are sortable in ascending and descending order by clicking on column headers. **PDF and Excel exports** opens by clicking on icon in lower left.

hronic	Condition Hypertension			×	
#	Name	DOB	Sex	Ethnicity	Facility
2,598					
1	8837, Patient	11/15/1981	м	Not Hispanic or Latino	Facility 1
2	9141, Patient	5/16/1995	М	Not Hispanic or Latino	Facility 11
3	9889, Patient	1/21/1989	м	Not Hispanic or Latino	Facility 11
4	10832, Patient	8/12/1980	М	Not Hispanic or Latino	Facility 10
5	10886, Patient	9/16/1983	м	Not Hispanic or Latino	Facility 11
6	11143, Patient	1/9/1981	М	Not Hispanic or Latino	Facility 10
7	17819, Patient	11/18/1955	м	Not Hispanic or Latino	Facility 13
8	18488, Patient	1/25/1931	М	Not Hispanic or Latino	Facility 5
9	22081, Patient	12/6/1979	м	Not Hispanic or Latino	Facility 10
10	22325, Patient	2/25/1973	М	Not Hispanic or Latino	Facility 7
11	22335, Patient	8/8/1981	м	Not Hispanic or Latino	Facility 8
12	23589, Patient	12/4/1934	М	Not Hispanic or Latino	Facility 11
13	29002, Patient	6/10/1988	F	Not Hispanic or Latino	Facility 10
14	29417, Patient	12/19/1978	М	Not Hispanic or Latino	Facility 13
15	32393, Patient	7/5/1962	F	Not Hispanic or Latino	Facility 11
16	38390, Patient	10/19/1982	F	Not Hispanic or Latino	Facility 13
17	40743, Patient	6/16/1935	м	Not Hispanic or Latino	Facility 2
18	41392, Patient	5/15/1984	м	Not Hispanic or Latino	Facility 11
19	42558, Patient	9/9/1985	F	Not Hispanic or Latino	Facility 2
20	44052, Patient	4/18/1964	м	Not Hispanic or Latino	Facility 1
21	44538, Patient	10/2/1925	м	Not Hispanic or Latino	Facility 2
22	44600, Patient	2/26/1967	М	Not Hispanic or Latino	Facility 2

https://sacvalleyms.org

Reveniense



Dashboard User Guide High Risk Patients Tile



This chart displays association between **number of Chronic Conditions and ED visit ranges.** Hover over any segment provides breakdown of patients with chronic conditions for that ED range. Click on bar opens **patient specific list.** Displays total number of patients.

Can filter on number of visits and Number of Chronic Conditions.

Same column sort features, name, DOB, sex. Export to Excel or PDF

ED	V15	115-1	у спк	UNIC	LUNDI	TION	OM	
3-4 Conditions								
5-6 Conditions								
7+ Conditions								
(500	1,000	1,500	2,000	2,500	3,000	3,500

Patient Name	Patient DOB	Sex	Ethnicity	Pat #
				2,209
3837, Patient	11/15/1981	М	Not Hispanic or Latino	1
9141, Patient	05/16/1995	М	Not Hispanic or Latino	1
1143, Patient	01/09/1981	М	Not Hispanic or Latino	1
17819, Patient	11/18/1955	М	Not Hispanic or Latino	1
21629, Patient	10/06/1972	М	Not Hispanic or Latino	1
22081, Patient	12/06/1979	М	Not Hispanic or Latino	1
22325, Patient	02/25/1973	M	Not Hispanic or Latino	1
23589, Patient	12/04/1934	M	Not Hispanic or Latino	1

Similar to ED Visit Group, but shows **total ED visits** for past 12 months by number of chronic conditions category. Hover over bar gives total visits.

> Click on bar within chart opens patient list. Total number of ED Visits displayed. Can filter by Facility and Number of Chronic Conditions. Displays: Name, DOB, sex and **total ED visits for that patient.** Same column sort features, name, DOB, sex and # visits.

All	ED I	acility	Re	port

Patient List					
Facility All Values (16) 🔽 Number of Chronic Co] onditions Group <mark>[3</mark>	-4 Cor	nditions 🔽		
Name	DOB	Sex	Ethnicity	Facility	Visit #
					17,051
756776, PATIENT	10/06/1980	F	Hispanic or Latino		210
1197817, PATIENT	02/28/1955	м	Hispanic or Latino		195
1539362, PATIENT	11/17/1952	F	Hispanic or Latino		192
1892303, PATIENT	01/01/1988	м	Hispanic or Latino		187
1163430, PATIENT	07/18/1949	М	Hispanic or Latino		185
2248565, PATIENT	05/10/1962	F	Hispanic or Latino		163
2028045, PATIENT	07/27/1987	М	Hispanic or Latino		148
2160680, PATIENT	01/05/1983	F	Not Hispanic or Latino		117

Patient List

ED Visit Group 5-10 visits



Dashboard User Guide High Risk Patients Tile



Top 5 Chronic Conditions -frequency of chronic conditions among the High-Risk patients. Click on bar opens patient list. Displays: Facility with <u>most recent use</u> of that Chronic Diagnosis Can filter by Facility and/or individual Chronic Condition. Same column sort features, name, DOB, sex and by Facility Export to Excel or PDF

V

Sex Ethnicity

Facility

Not Hispanic or Latino Facility 1

Not Hispanic or Latino Facility 11

Not Hispanic or Latino Facility 11

Not Hispanic or Latino Facility 11

Not Hispanic or Latino Facility 13

Not Hispanic or Latino Facility 10

8/12/1980 M Not Hispanic or Latino Facility 10



Gender and Age Distribution of Patients

DOB

11/15/1981 M

5/16/1995 M

1/21/1989 M

9/16/1983 M

1/9/1981 M

11/18/1955 M

Facility All Values (16) V Chronic Condition Hypertension

1 8837, Patient

2 9141, Patient

3 9889, Patient

4 10832, Patient

5 10886, Patient

6 11143, Patient

7 17819, Patient

Name

2.598

This report adds graphic analysis of the number of chronic conditions by age and sex. Clicking on bar opens patient specific list.



High Risk Patients Tile



High Risk Patient List

Displays distribution of chronic diseases among the High-Risk patient population. As example. For those with 7+ conditions, Heart Failure is present 50% of the time.

Selecting one of the segments in the bars automatically displays the patient list. Filters on facility, condition and number of conditions group. Same sort and export options.

Of Note: clicking on All Chronic Conditions sorts the conditions in alphabetical order.

49 774455, Patient	12/05/2013 M	2016-02-27	Facility 7	Alzheimers Disease, Asthma, Cancer, COPD, Hyperlipidemia
1 37776, Patient	05/01/2011 F	2016-06-30	Facility 5	Alzhein Alzheimers Disease, Asthma, Cancer, COPD, Hyperlipidemia, Hypertension
33 1909692, Patient	08/30/1979 M	2016-07-25	Facility 1	Alzhe hers Disease, Asthma, COPD, Hyperlipidemia, Hyper
17 1750388, Patient	08/26/2005 F	2016-05-25	Facility 7	Alzheimers Disease, Asthma, COPD, Hypertension, Osteopo

Mouse hover displays extended list of chronic conditions.



High Risk Patients Tile

Partial Plane Haden Like Event Instantion Performance Event Instantion	buck Home						High R	lisk Patients	
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B 10080, PATLENT 00(19)1865 F W/ht 00 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	7 176021, PATIENT	09/17/1980	F Not Hisp	White	0	5		client facility as part of	the total
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<pre>ting</pre>								providers.	
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Polychronic Patients Tile



PolyChronic Patients

OVERVIEW: Patients with 3 or more Chronic Disease Conditions.

A CMS list of 27 chronic conditions is the reference. Clinical advisory members refined the conditions down to 17 for display. https://www.ccwdata.org/web/guest/condition-categories

All Values (17) Alzheimers Disease Asthma Atrial Fibrillation Bipolar Cancer Chronic Kidney Disease COPD Depression Diabetes Heart Failure Hyperlipidemia Hypertension **Ischemic Heart Disease** Osteoporosis Rheumatoid Arthritis Osteoarthritis Schizophrenia Stroke Ischemi Transie

https://sacvalleyms.org



Dashboard User Guide Polychronic Patients Tile

PURPOSE: Polychronic Patient dashboard identifies patients that could be considered most at risk for poor health outcomes, high resource utilization and in need of care coordination and management.



Chronic Conditions Distribution shows distribution of chronic conditions by color code. Hover over individual bar provides specific number of patients with that condition. Numbers will be greater than the number of patients due to multiple conditions/patient.



Clicking on any bar from the Chronic Conditions color chart opens a distribution of chronic diseases in a descending order of frequency for the population. Can be limited to 1 facility to note differences. NOTE: Facility with <u>most recent use</u> of the chronic diagnosis is identified as the source. PDF option available.

Chronic	Condition Hyperten	sion		×	
#	Name	DOB	Sex	Ethnicity	Facility
2,598					
1	8837, Patient	11/15/1981	м	Not Hispanic or Lating	Facility 1
2	9141, Patient	5/16/1995	М	Not Hispanic or Lating	Facility 11
3	9889, Patient	1/21/1989	м	Not Hispanic or Lating	Facility 11
4	10832, Patient	8/12/1980	м	Not Hispanic or Lating	Facility 10
5	10886, Patient	9/16/1983	м	Not Hispanic or Lating	Facility 11
6	11143, Patient	1/9/1981	M	Not Hispanic or Lating	Facility 10
7	17819, Patient	11/18/1955	м	Not Hispanic or Lating	Facility 13
8	18488, Patient	1/25/1931	м	Not Hispanic or Lating	Facility 5
9	22081, Patient	12/6/1979	м	Not Hispanic or Lating	Facility 10
10	22325, Patient	2/25/1973	М	Not Hispanic or Lating	Facility 7
11	22335, Patient	8/8/1981	м	Not Hispanic or Lating	Facility 8
12	23589, Patient	12/4/1934	м	Not Hispanic or Lating	Facility 11
13	29002, Patient	6/10/1988	F	Not Hispanic or Lating	Facility 10
14	29417, Patient	12/19/1978	М	Not Hispanic or Lating	Facility 13
15	32393, Patient	7/5/1962	F	Not Hispanic or Lating	Facility 11
16	38390, Patient	10/19/1982	F	Not Hispanic or Lating	Facility 13
17	40743, Patient	6/16/1935	м	Not Hispanic or Lating	Facility 2
18	41392, Patient	5/15/1984	м	Not Hispanic or Lating	Facility 11
19	42558, Patient	9/9/1985	F	Not Hispanic or Lating	Facility 2
20	44052, Patient	4/18/1964	м	Not Hispanic or Lating	Facility 1
21	44538, Patient	10/2/1925	M	Not Hispanic or Lating	Facility 2
22	44600, Patient	2/26/1967	M	Not Hispanic or Lating	Facility 2

Selecting an individual condition from distribution chart opens a **patient list with that chronic condition.** List will retain selection from previous chart or can be filtered by **Facility** and **Chronic Condition** without returning to previous chart. **Total** number of patients with chronic condition displays in upper left of list. Columns are sortable in ascending and descending order by clicking on column headers. **PDF and Excel exports** opens by clicking on icon in lower left.

https://sacvalleyms.org



Dashboard User Guide Polychronic Patients Tile



This chart displays association between **number of Chronic Conditions and visit ranges.**

Hover over any segment provides breakdown of patients with chronic conditions for that visit range. Click on bar opens **patient specific list.** Displays total number of patients.

Can filter on number of visits and Number of Chronic Conditions.

Same column sort features, name, DOB, sex.

Visit Group 5-10 visita

Number of Chronic	Conditions Group	Values (3		
Patient Name	Patient DOB	Sex	Ethnicity	Pat #
				2,209
8837, Patient	11/15/1981	M	Not Hispanic or Latino	1
9141, Patient	05/16/1995	м	Not Hispanic or Latino	1
11143, Patient	01/09/1981	M	Not Hispanic or Latino	1
17819, Patient	11/18/1955	м	Not Hispanic or Latino	1
21629, Patient	10/06/1972	м	Not Hispanic or Latino	1
22081, Patient	12/06/1979	м	Not Hispanic or Latino	1
22325, Patient	02/25/1973	M	Not Hispanic or Latino	1

м

Not Hispanic or Latino

1



Top 5 Chronic Conditions -frequency of chronic

12/04/1934

conditions among patients.

Click on bar opens patient list.

Displays: Facility with most recent use of that

Chronic Diagnosis

Can filter by Facility and/or individual Chronic

Condition.

23589, Patient

Same column sort features, name, DOB, sex and by Facility

Patient Drill Down from Gender and Age for # Chronic Conditions

Gender and Age Distribution of Patients

This report adds graphic analysis of the number of chronic conditions by age and sex.





Polychronic Patients Tile



Polychronic Patient List

Displays distribution of chronic diseases among the patient population. As example. For those with 7+ conditions, Heart Failure is present 50% of the time.

Selecting one of the segments in the bars automatically displays the patient list. Filters on facility, condition and number of conditions group. Same sort and export options.

Of Note: clicking on All Chronic Conditions sorts the conditions in alphabetical order.



Polychronic Patients Tile

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Drill down to patient specific list by condition and insurer from chart.



Dashboard User Guide Population Health Tile

POPULATION HEALTH

			Home		
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High Risk Patients	Quality Metrics	Readmissions	Disease Registries	Population Health	Appendix

Population Health intended for use to identify and plan for population health needs on a **defined geographic regional basis**, not restricted to client specific population. Data displayed has been modified to comply with HIPAA de-identification rules.

Potential Use: Identify high population for a geographic region with certain high risk or "at risk" diagnoses or lab values.

Community health resource coordination and planning.

Current Criteria

- 1. A1c Poor Control are patients with a diagnosis of Diabetes and a lab value for Hemoglobin A1c that is 9% or greater.
- 2. A1c Range 5.7-6.4% criteria is patients without Diabetes and a lab value of Hemoglobin A1c in the defined range. It identifies "at risk" patients.
- 3. Acute Myocardial Infarction lists patients treated with a diagnosis of Acute MI as defined on the Appendix.
- 4. **BG 100-125** lists patients who are **not diabetic** and have a **blood glucose** within the 100-125 mg/dl range, another "at risk" for diabetes indicator.
- 5. **BG>125** displays **non-diabetic patients** with **blood glucose higher than 125 mg/dl**. Potentially at even higher "risk" for diabetes.
- 6. **Diabetes:** All patients in population with **diagnosis of Diabetes.**
- 7. **Heart Failure:** Patients identified with diagnosis of **Heart Failure** (see Appendix for specific codes)
- 8. Hypertension: Patients identified with Essential Hypertension
- 9. Ischemic Heart Disease: Patients diagnosed with ischemic heart disease condition.
- 10. **Prediabetes:** Patients who were diagnosed with certain **Pre-Diabetic diagnoses**, Impaired Glucose Tolerance
- 11. Stroke Transient Ischemic Attack (TIA): Those with a diagnosed condition of Stroke or TIA in the patient population.
- 12. **Tobacco Use Disorder:** Those with a record of Tobacco Use.



Dashboard User Guide Population Health Tile



Regions are organized to include populations of at least 20,000 residents to comply with HIPAA deidentification rules. Mouse over provides number of patients with condition.



Population Health Tile



The second tab of Population Health displays information for counties in with greater than 20,000 residents.



Provider Patient Pool Tile

PROVIDER PATIENT POOL REVIEW

Provider PATIENT POOL REVIEW

The Provider Patient Pool Review page shows a list of patients that are in the logged-in provider's security group. The page allows providers to exclude patients from the provider's pool, or to re-include a currently excluded patient via the Included? checkbox. It also provides a detail list of each patient's encounters as a click-action.

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Patient Name	Sex	DOB	Encounters at Facility	Encounters Most at Other Recent Facilities Encounter Date at Facility	Not Seen at Facility in 18 Months	Most Recent Provider at Facility	Most Recent Primary Payer at Facility	Included?	Payer Attributed?	Last Pool Status Change	Patient Has >1 Provider	Patient Has No Provider	
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	@ encour	ice Detail	13	0 2019-02-20		. 0	STUDENT ASSL					۲	
	Reques	t Provider Change	19	0 2019-03-25			CORESOURCE -					۲	
	F	1944-04-16	25	0 2018-12-16		. 0	HUMANA - O/P		Ē.			۲	
	F	1929-02-05	44	0 2018-12-13		. 0	MEDICARE						
	F	1926-01-30	153	0 2019-03-06		. 0	MEDICARE INP					۲	
	M	1959-05-02	64	0 2019-02-26		. 0	UNITED HEALT					0	
	M	1953-09-28	43	0 2019-04-11		. 0	BLUE CROSS B		0			۲	
	M	1961-11-07	16	0 2018-12-04		. 0	BC/BS FEDERA					۲	
	F	1932-02-04	152	0 2019-03-18			MEDICARE KS					۲	
								_				-	

Basic Demographics - Patient Name - patient's last name, first name, Sex, DOB

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 patient's last visit within the client's facilities.

<u>Not Seen at Facility in 18 Months</u> - a red indicator marks any patient that has not had a visit with the client in the last 18 months, blank otherwise.

Most Recent Provider at Facility - the latest provider name available on the patient's visits.

<u>Most Recent Primary Payer at Facility</u> - the latest primary name available on the patient's visits within the client facilities.

Included? - a checkbox indicating if the patient is marked as included in (dark green) or excluded from (white) the provider's view. Included (green) is the default state. A provider can change the Included/Excluded status of a patient by clicking on the checkbox on that patient's row. A popup window appears where a user can 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.

<u>*Note:</u> after changing the Include? status for one or more patients, a user needs to log out and log back in to the dashboards to see the new Included/Excluded settings effected on the data dashboards.

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. This checkbox is read-only in the provider's view.

Last Pool Status Change - the date and time of the last edit to a patient's Included/Excluded status via the Included? checkbox.



Patient Encounter Detail Report

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 logged in provider's security group, the Included? status (which can be edited here as well), the Payer Attributed? status for the patient, and a list of all the encounters for the patient.

Back Hon	ne			Provider Patient Deta				
Patient Name	Provider			Included? Payer Attributed?				
(618)	Demo Large				0			
Patient Account ID		Admit Date	Facility	Admitting Provider	Encounters at Facility	Encounters at Other		

E Back Ho	me					Provider Patie	nt Pool Re	eview			
Provider Demo Large				•			Attribute	d Payer All Vi	alues (8)		•
Status All Values (2)	Not Seen in 18+ All Values (2) Last Initial All Values (2)			5) ¥ First Initial	All Value	es (26)	To Limit Rows 1000				
Patient Name	Sex DOB	Encounters at Facility	Encounters Most at Other Recent Facilities Encounter Date at Facility	Not Seen at Facility in 18 Months	Most Recent Provider at Facility	Most Recent Primary Payer at Facility	Included?	Payer Attributed?	Last Pool Status C	nange	0 -

Filters

The Patient Pool report can be filtered by the following quickviews:

• 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 show in the report. The default is 10.



Dashboard User Guide Provider Patient Pool Tile

Back Ho	me				Provider Patient Pool Review							
rovider Demo Large					•			Attribute	ed Payer All Vi	alues (8)		
Status All Values (2)	•	Not Seen in 18+ Months	All Values	(2)	T Last	All Values (2	6) v First Initia	All Valu	es (26)	To Limit Rows	1000	_
Patient Name	Sex DOB	Encounters at Facility	Encounters at Other Facilities	Most Recent Encounter Date at Facility	Not Seen at Facility in 18 Months	Most Recent Provider at Facility	Most Recent Primary Payer at Facility	Included?	Payer Attributed?	Last Pool Status Ch	lange	0
(13)		0	1									
(618)					۲							
(623)									9			
(628)					۲							
(631)												
(632)									- C -			
(637)												
(638)									C1			
(642)									0			

• Confirm Patient Pool Reviewed - Clicking on this button simply refreshes the page and logs an acknowledgement from the provider user that the patient pool has been reviewed. On subsequent logins, the provider user will not see the initial Welcome Page but will instead be taken directly to the data dashboards.

• Go to Dashboards - this link takes the user to the main menu for the data dashboards.



Quality Metrics Tile

QUALITY METRICS



The Quality Metrics dashboard displays client results and analysis of preventive care procedures commonly required and approved for quality reporting programs for ambulatory practices. Individual measures are structured to meet NCQA, CMS and HEDIS requirements.

Measures include screening for colorectal, cervical and breast cancers, osteoporosis, pneumonia and influenza vaccines, controlled high blood pressure, diabetes and tobacco use.



Patient eligibility all patients in total client population that meet the QM guidelines. Individual measures may have exclusions based on age, gender or previous conditions Details of the requirements for each condition and measure can be found in the Appendix. **'Performance'** is a breakdown of how the patient can be categorized per the metric of interest.

Met - The patient has fallen into both the numerator and denominator requirements for the metric including any office visit criteria. **Not Met** - The patient meets the denominator criteria, but does not meet the numerator criteria for the metric.

Unreported - The patient meets the numerator requirements for the metric, however the patient does **not** have the required office visit, excluding them from the denominator population to be considered "Met".

Period The 'Period' dropdown is a breakdown timeframes.

The three 'Period' options are:

Current -The current calendar year. Previous - The previous calendar year. Historical - Anything prior to the previous calendar year.



Measures help clients meet their MIPS Quality reporting requirements and other health insurance mandates by completing their records with dates and evidence of preventive screenings performed outside their facility. Export format allows ease of filtering and import into EMR or other tracking software.

Patient list for each measure display from each bar chart on the overview dashboard. Report columns vary dependent on the chart selection.

abent List											Patient List exar	nple from
Facility All Value	s (16) 🔻				N P	Metric Perfor	Controlled H Breast Cance Cervical Cance Colorectal Ca	gh Blood Pressure			Measure 12 mo	nths.
Patient Name	DOB	Sex	Ethnicity	Race	Activity Date	Mos	Controlled Hi Influenza Ima Osteoporosis Pneumonia In	ph Blood Pressure nunization Screening nmunization	Act Type	Act D	esc	Record #
1577045, PATIEN	10/03/1939	M	Not Hisp	White	08/09/2018	Faci	Primary Carie	s Prevention	Vital Sign	Vitals	In Control - 110 / 66	1
2794729, PATIEN	05/28/1948	М	Hispanic		08/09/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 122 / 68	1
474383, PATIEN	08/24/1934	F		White	08/08/2018	Facil	ity 1	Lab	Vital Sign	Vitals	In Control - 100 / 45	1
1262432, PATIEN	09/11/1944	F	Not Hisp	White	08/07/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 124 / 70	1
1938695, PATIEN	07/28/1939	M	Not Hisp	White	08/07/2018	Facil	ity 10	Lab	Vital Sign	Vitals	In Control - 121 / 71	1
3981333, PATIEN	08/06/1943	F	Not Hisp	White	08/07/2018	Facil	ity 15	Lab	Vital Sign	Vitals	In Control - 120 / 70	1
592333, PATIEN	11/23/1962	M	Not Hisp	White	08/06/2018	Facil	ity 10	Lab	Vital Sign	Vitals	In Control - 132 / 84	1
2826896, PATIEN	08/04/1956	М	Not Hisp	White	08/06/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 134 / 56	1
421069, PATIEN	07/17/1938	F	Not Hisp	White	08/01/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 108 / 60	1
567239, PATIEN	08/25/1961	F	Not Hisp	White	08/01/2018	Facil	ity 3	Lab	Vital Sign	Vitals	In Control - 110 / 73	1
963710, PATIEN	04/16/1936	F	Not Hisp		08/01/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 112 / 70	1
1293051, PATIEN	02/21/1935	М	Not Hisp	White	08/01/2018	Facil	ity 8	Lab	Vital Sign	Vitals	In Control - 112 / 60	1

Facility Charts by Records and by Patients display most frequent facility for a single measure. Selecting the Metric drop down changes display of charts on right. Patient list detail for each is obtained by selecting bar on chart.

Potential Use: Facilities may want to see where their patients have completed the preventive care measures. Gives indication of referral patterns and utilization. May be of particular interest to integrated network of hospital and physician clinics.



Readmissions Tile







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Displays the **Readmit trends by date ranges**. Most frequent in this example occur within 0-5 days. This is useful tool for analyzing reasons for re-admit and designing interventions to prevent. The need for follow up clinic appointments within 0-5 days or phone contact to check patient condition and answer questions, ensure medication compliance. Trend can vary by disease condition and facility. Drill down on bar chart opens patient specific list.

Displays the **FACILITIES** where patients returned for readmission. Organizations may know when patient readmitted to their facility, but not when they readmit elsewhere. Useful to identify trends in patient utilization, and targeted patient education and coordination between facilities. **Only admissions to another qualified Acute care facility IPPS count.** Transfers between hospitals, admits to Critical Access, Long term care, psychiatric or rehabilitation hospitals and other specialty facilities do not count.

https://sacvalleyms.org



Readmissions Tile

Drill down from the bar on chart opens patient list Filtered by Return Facility.

Ba	ick Hom	e			AN	41	Readmissio	ns		
Medi Facility	All Values (15)	sions Medicare	e Readmission	s Patient	List HF HI Type	P-KNEE	s All Readmissions Patient List Discharge Year-Month	olling 12 Mon	ths 💌 I	Beginning Month:2016-02 Ending Month:2017-01
#		Patient Name	DOB 5	Sex Adm	it Date	Discharge Date	Provider	Condition	Facility	Primary Diagnosis
32										
17	Index First Return	403614, PATIEN	1951/02/20 1	M 2016 2016	5-04-25 5-05-04	2016-04-26 2016-05-09	PHYSICIAN93951, 93951 (TRRRQ@KQ) PHYSICIAN126258, 126258	STROKE	Facility 9 Facility 14	161.8 Other nontraumatic intrace 274.4663001 Acute pain
18	Index First Return	1973943, PATIE	1936/07/20	M 2010 2010	5-04-26	2016-05-06 2016-05-29	PHYSICIAN93860, 93860 (TRRRRW\$T) PHYSICIAN126258, 126258	STROKE	Facility 3 Facility 14	163.9 Cerebral infarction, unspeci 274.4663001 Acute pain
19	Index First Return	243944, PATIEN	1929/12/02	= 2016 2016	5-02-07	2016-02-14 2016-02-28	PHYSICIAN94165, 94165 (TRRRT\$%R) PHYSICIAN126258, 126258	STROKE	Facility 9 Facility 14	I60.8 Other nontraumatic subara 274.4663001 Acute pain
20	Index First Return	656962, PATIEN	1932/12/15	= 2016 2016	5-02-02	2016-02-05 2016-02-17	PHYSICIAN93467, 93467 (^RQ@RR) PHYSICIAN126258, 126258	STROKE	Facility 9 Facility 14	163.5 Cerebral infarction due to u 274.4663001 Acute pain
21	Index First Return	2056166, PATIE	1946/08/08	2010	5-04-13	2016-04-15 2016-05-04	PHYSICIAN91820, 91820 (%W%\$CK) PHYSICIAN126258, 126258	STROKE	Facility 9 Facility 14	G45.9 Transient cerebral ischemic 129.9844 Alteration in nutrition (1
22	Index First Return	144569, PATIEN	1950/07/14	= 2010 2010	5-04-13	2016-04-24 2016-05-14	PHYSICIAN93860, 93860 (TRRRRW\$T) PHYSICIAN64961, 64961	STROKE	Facility 9 Facility 14	163.441 Cerebral infarction due to 150.22 CHRONIC SYSTOLIC (CON
23	Index First Return	917095, PATIEN	1943/06/14	M 2010	5-04-10	2016-04-13 2016-05-13	PHYSICIAN91849, 91849 (R^R%\$W) PHYSICIAN126258, 126258	STROKE	Facility 9 Facility 14	163.9 Cerebral infarction, unspeci- 274.4663001 Acute pain





Drill down from the bar on chart opens patient list Filtered by Return Facility.

READMIT RATE 12 month Trend: Displays a monthly trend of readmissions for selected condition and facility. Also provides a comparison with previous 12 month period. (Data dependent). Clicking on the spreadsheet icon upper right opens a pop-up

	Month	Cut 12 Months	Prev 12 Months
	September	1/.2	23.3
	October	11.6	41.3
	November	24.1	-30.0
	Depember	36.2	51,5
A MARCH AND A MARCH	January,	14.3	
able exports to	February	21.4	15.4
DE and Excel	Micro	27,8	91
DI and Excel	april	9.1	16.7
	May	16.2	16.7
	June	10.9	40.0
	JUNY	19	5.7
	August	16.1	16.7

INDEX W/Readmit vs POPULATION

Comparison of readmits to the total admissions for condition by month. May see seasonal variations especially for conditions of Pneumonia and COPD.

Selecting changes chart display to actual values. No patient drill down in this view. Re-selecting icon changes display back to bar chart.

INDEX W/READMIT vs POPULATION								
Discharge Year-Month	Index w/Readmit	Index Populatio						
2015-09	5	2						
2015-10	4	3						
2015-11	7	2						
2015-12	6	3						
2016-01	6	4						
2016-02	4	1						

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Readmissions Tile

Back	Home			Readmissions
Medicare F	Readmissions	Medicare Readmissions Patient List	All Readmissions	All Readmissions Patient List

Selecting patient list from the main Readmissions Dashboard is a quick way to go directly to the patient specific details for readmissions for each condition. Filters available include Facility (initial admitting), Return Facility, Disease Type, # days, and Discharge Year-Month.

Ba	ack Hom	e					Readmiss	sions		
Medi	care Readmis	sions Medicare	e Readmissio	ns Pa	atient List	All Readmission	s All Readmissions Patient List			
Facility	All Values (15) Facility All Va	v lues (15) v			Type	0PD V ys1-5 V	Discharge Year-Month	YTD Comple	te 🔽	Beginning Month:2017-01 Ending Month:2017-01
#		Patient Name	DOB	Sex	Admit Date	Discharge Date	Provider	Condition	Facility	Primary Diagnosis
4										
1	Index First Return	1655343, PATIE	1947/10/27	м	2017-01-10 2017-01-14	2017-01-13 2017-02-02	PHYSICIAN19122, 19122 (RANST) PHYSICIAN20754, 20754	COPD	Facility 2 Facility 2	J44 CHRONIC OBSTRUCTIVE PULI J44 CHRONIC OBSTRUCTIVE PULI
2	Index First Return	603115, PATIEN	1950/06/26	F	2017-01-22 2017-01-29	2017-01-24 2017-01-30	PHYSICIAN96800, 96800 (JOUDFAN) PHYSICIAN96462, 96462	COPD	Facility 8 Facility 6	J44.9 CHRONIC OBSTRUCTIVE PU J44.9 CHRONIC OBSTRUCTIVE PU
3	Index First Return	948566, PATIEN	1951/12/30	м	2017-01-10 2017-01-19	2017-01-15 2017-01-22	PHYSICIAN96796, 96796 (CLAWAAC) PHYSICIAN126258, 126258	COPD	Facility 9 Facility 14	J44.9 CHRONIC OBSTRUCTIVE PU
4	Index First Return	1372926, PATIE	1944/08/20	F	2017-01-22	2017-01-23	PHYSICIAN38691, 38691 (HUGT)	COPD	Facility 8 Facility 13	J44.9 CHRONIC OBSTRUCTIVE PU

Facility: The first facility where patient is admitted with one of the qualifying index conditions. In many cases, this will be restricted the client's eligible hospital, unless the client has multiple eligible facilities. <u>The hospital where the patient is first admitted</u> is the one that is assigned the potential penalty if the patient readmits at the same or any other eligible facility (**RETURN Facility**) within 30 days <u>for any reason.</u>

Specific **exclusion criteria for readmission** conditions included scheduled procedures, treatment for cancer and other diseases. KAMMCO structures data rules to comply with specific criteria to the extent possible based on available data. Lack of access to billing and claims and non-KHIN participant's data limits ability to completely replicate or comply with CMS or other payer algorithms. The intent of Readmissions is to provide early identification of potential risks.



Readmissions Tile

All Readmissions



All readmissions includes the 7 Medicare conditions plus readmits for any conditions (HWR) to the list of clinical conditions. Readmissions in this section are not restricted to Medicare beneficiaries and includes all patients 18 years and older.

Eligible hospitals include Critical Access Hospitals in addition to Acute IPPS facilities.



UTILIZATION



Utilization includes all visits with a filtering option for recognized office visits codes versus nonoffice visits. There are several facility selection options. The left facility selection option is a 'pick list'.

To select multiple facilities at one time, hold the 'Ctrl' key on your keyboard and click on other facilities. The two other single selection pick lists will be set to 'All Values', however the results will represent those items selected in the pick list.



Dashboard User Guide Utilization Tile



Displays emergency department activity for selected date range. Top five facilities for activity appear in rank order. Drill down into facility and patient detail available from chart.





Inpatient Visit Totals: Displays inpatient activity for selected date range. Top five facilities for activity appear in rank order. Drill down into facility and patient detail available from chart.

> ED/Inpatient Visit Follow up Interval This chart tracks office visits after an IP or ED visit. Drill down is available into patient detail to show site of ED or IP visit and associate office encounter.

al Page									
Facility	All Values (16) 🔻			Office Visit Durat	ion Category All Values	(7) Y Patient T	ype All Values (2) 🔻		
#	Name	DOB	Sex	Discharge Date	Discharge Facility	OV Date	OV Facility	OV Code	OV Desc
1	2252409, Patien	: 1/1/1950	М	02/01/2017	Facility 12	02/05/2017	Facility 14	99213	Office/outpatient visit, est
1	2252409, Patient	1/1/1950	M	02/01/2017	Facility 12	02/05/2017	Facility 14	99213	Office/outpatient visit, est
1	2252409, Patient	1/1/1950	M	02/01/2017	Facility 12	02/05/2017	Facility 14	99213	Office/outpatient visit, est
1	2252409, Patient	1/1/1950	Μ	01/31/2017	Facility 12	02/05/2017	Facility 14	99213	Office/outpatient visit, est
1	2252747, Patient	2/5/1968	M	01/20/2018	Facility 7	01/28/2018	Facility 12	99213	OFFICE OR OTHER OUTPATIEN
1	2252747, Patient	2/5/1968	M	01/07/2018	Facility 7	01/28/2018	Facility 8	99213	OFFICE OR OTHER OUTPATIES
1	2253064, Patien 2253581, Patien	11/17/1966 7/16/1950	M	10/03/2017	Facility 2 Facility 12	10/06/2017 01/26/2017	Facility 15 Facility 14	99204 99212	OFFICE/OUTPATIENT VISIT, N Office/outpatient visit, est
1	2253581, Patien	7/16/1950	M	01/20/2017	Facility 12	01/26/2017	Facility 14	99212	Office/outpatient visit, est
1	2253581, Patien	7/16/1950	M	12/21/2016	Facility 12	01/26/2017	Facility 14	99212	Office/outpatient visit, est
1	2253581, Patien	7/16/1950	M	01/21/2017	Facility 12	01/26/2017	Facility 14	99212	Office/outpatient visit, est
1	2253581, Patien	7/16/1950	M	01/21/2017	Facility 12	01/26/2017	Facility 14	99212	Office/outpatient visit, est

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Dashboard User Guide Utilization Tile

Office Visit Current Year; Rolling 12 Months; and Previous Year display graphically by month the incidence of office and other types of visits for the patient population.



Patient List

Home						Patient Visit Count
Overview Patient List	Office Visit Patient Lis	c .				
Contraction of the second s						
Facility All Values (16) V			MPI	All Val	ues (104835) Q	
			Patient	Name All Val	ues (104791) Q	
	VIS	IT COL	UNTBY	PATIENT		
# Name	DOB	Sex El	thnicity	Race	Total Visits	-
104,790					1,789,189	11 ·
1 2047333, PATIENT	05/24/1982	F			5,616	
2 686670, PATIENT	11/30/2001	M	1	White	1,948	
3 2321192, PATIENT	12/10/1954	M			1,844	
4 1126317, PATIENT	10/20/1947	M N	lot Hisp		1,261	
5 1197817, PATIENT	02/28/1955	M H	lispanic	White	968	
6 1051364, PATIENT	11/30/1987	M			846	
7 1680674, PATIENT	06/24/1973	F N	lot Hisp	American	805	
8 2111582, PATIENT	09/28/1979	F N	lot Hisp		790	
9 683843, PATIENT	04/11/1981	M N	lot Hisp	White	685	
10 1092586, PATIENT	05/25/1987	F N	lot Hisp		681	
11 2073888, PATIENT	04/18/1963	F			640	
12 1618477, PATIENT	12/10/1979	M N	lot Hisp		630	
13 1783759, PATIENT	02/27/1983	F			625	
14 1968471, PATIENT	07/17/1954	F	1	White	595	
15 2210877, PATIENT	12/05/1987	F			593	
16 756735, PATIENT	11/22/1974	F N	lot Hisp	White	582	

Patient List displays a historical list of all visit activity for all patients in the client's population. Use of the Patient Name selection displays a single patient name. This is useful to confirm patient is included in population. Selecting a single patient provides visit details.

SACVALLEY MEDSHARE					
Back Home					Patient Visit Count
Overview Patient List Offi	ce Visit Patient Lis	t			
Facility All Values (16) T		MPI Patient	All Name 496	Values (104835) Q	
	VIS	IT COUNT BY	PATIENT		
# Name	DOB	Sex Ethnicity	Race	Total Visits	
1				12	
			and the	(1) (2)	



Utilization Tile

isit Date				
isit Date	e			
	Facility	Day of Week	Time of Day	21
017/12/10	Facility 14	Sun	08	
017/12/09	Facility 13	Sat	23	
017/10/31	Facility 4	Tue	14	
017/08/12	Facility 13	Sat	23	
017/03/23	Facility 13	Thu	23	
017/03/23	Facility 13	Thu	23	
017/03/23	Facility 13	Thu	23	
017/03/23	Facility 13	Thu	23	-
017/02/05	Facility 13	Sun	23	
017/02/05	Facility 13	Sun	23	
	9			
_	7			
	5			
		1 m m		
	11/12/10/31 017/10/31 017/03/12 017/03/23 017/03/23 017/03/23 017/02/05	9 9 9 9 8 7 6 9 8 7 6	91/12/105 Facility 13 Soc 017/10/31 Facility 13 Sat 017/08/12 Facility 13 Thu 017/03/23 Facility 13 Sun 017/02/05 Facility 13 Sun 017/02/05 Facility 13 Sun 017/02/05 Facility 13 Sun	9 9 9 8 7 6

Daci	< Home					Account Det				
acility:	Facility 13		PCP: ,	1						
Pat Name	e: 496003, PATIENT		Accoun	Account ID: *>AJYYOPPYIY*PPTJ%%OBXJ%B\$J						
Diagnosi	s List				- 1					
Diag Code	Diag Desc			Diag Se	quence					
B349	Viral disease				1					
209	Bronchitis				2	the second second				
259	Contact dermatitis			22.2	3	Single Patient visit				
200129	Encounter for routine child	health examinati	on without abnorm	al findings	4	detail in Utilization				
Insurance Ins Name	e List	Effective Date	Explication Date	Raced on Visit D	ata					
ins reame	c864c3efd1a855719cade6d	2017/10/30	Expiration Date	2017/03/23	ite					



Dashboard User Guide Utilization Tile

Office Visit Patient List Displays Office, Clinic, Inpatient, and Other visits for patient within selected time periods. Filtering available for facility, month, and all visits, office or non-office visits. Mouse hover expands visit description

= Back	Home						Uti	lization Patient List	Trend Pop-up
Facility All Valu	es (16) 🔻					Month YTD	Complete V	Office Visit Yes V All Values (2) No	2
Record # P	atient Name	DOB	Sex	Ethnicity	Race	Activity Date	Visit Desc	Facility	
7,468									
1 3	872413, Patient	12/06/1954	F	Not Hisp	White	03/25/2018	OFFICE/OUTPATIENT VISIT ES	Facility 8	
1 3	872413, Patient	12/06/1954	F	Not Hisp	White	04/20/2018	OFFICE/OUTPATIENT VISIT ES	Facility 8	
1 3	874382, Patient	07/27/1944	F		White	04/30/2018	Office/outpatient visit; establis	Facility 10	
1 3	874822, Patient	01/10/1946	M	Not Hisp	White	01/12/2018		atizat lauri 2, 00212	
1 3	875344, Patient	06/23/1946	M	Not Hisp	White	02/03/2018	Onice/outpatient visit; established;	Tucincy 15	
	878042, Patient	08/15/1968	M		White	02/04/2018	Office/outpatient visit; establis	Facility 10	
1 3	All the second states and the second second				Mibito	04/02/2019	Office (outpatient visit: octablic	Engliby 10	
13	878042, Patient	08/15/1968	M		write	04/02/2010	Office/outpatient visit, establis	racincy 10	