KPI Basic Navigation
&
Review

August 10, 2020

Los Angeles County Department of Public Health
Substance Abuse Prevention and Control

Learning Objectives

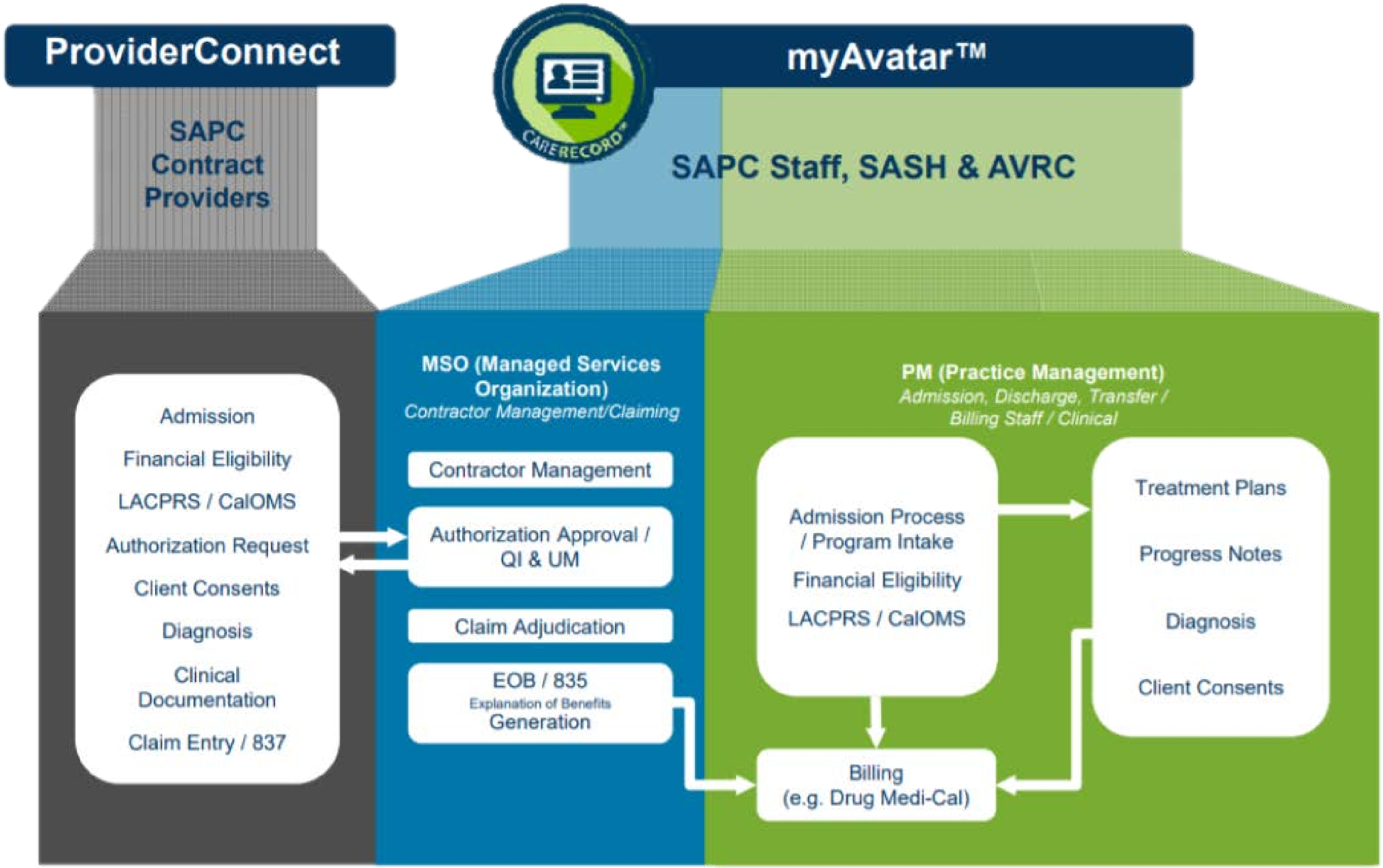
Understand	Understand where data is pulled from and how long it remains available in KPI.
Identify	Identify 4 ways “drill down” or apply a filter.
Highlight	Highlight MSO KPI sheets that may have the most utility for Providers. • Provider Demonstration of sheets with use cases • Review limitations of sheets.

KPI Dashboards Overview

KPI Data

- All data is pulled from myAvatar.
  - If it doesn't exist in myAvatar it cannot be pulled into KPI

myAvatar™



Data Availability

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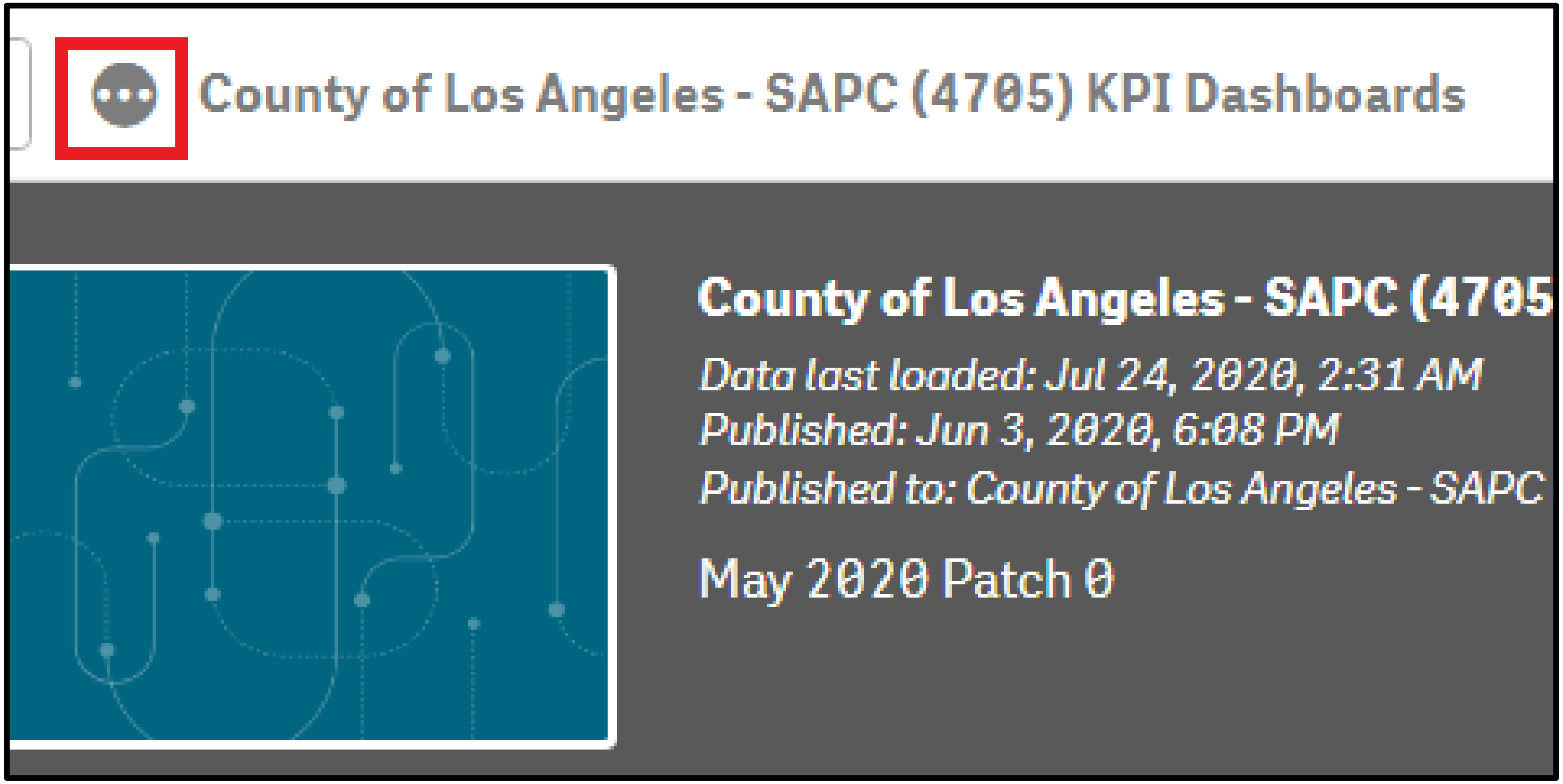
- Data in the KPI Dashboards is available on a “rolling history” basis, meaning it is only available for a finite amount of time.
- We will always have access to the two previous calendar years, two previous fiscal years, plus the current calendar year.

CURRENT DATE	AVAILBLE DATA RANGE
April 1, 2020	Fiscal Year Available: FY17/18, FY18/19, partial FY19/20
	Calendar Year Available: 2018, 2019, 2020 (to present)
	Date Range: Dec 1, 2017 (Sage GO LIVE) - March 31, 2020
Aug 10, 2020	Fiscal Year Available: FY18/19, FY19/20; partial FY20/21
	Calendar Year Available: 2018, 2019, 2020 (to present)
	Date Range Jan 1, 2018 – August 9, 2020
Jan 15, 2021	Fiscal Year Available: FY18/19, FY19/20, partial FY20/21
	Calendar Year: 2019, 2020, 2021 (to present)
	Date Range: July 1, 2018 – Jan 14, 2021



Nightly Loads

- Data is not live.
- Verify when the last completed load occurred.
- This may explain why you are not seeing expected data.
- KPI (PM side) and MSO KPI load at different times.

KPI and MSO KPI at a glance

KPI Dashboards 2.0

- Pulls information from the Practice Management (PM) side of myAvatar
- Includes information between the State and SAPC.
- Pulls information from specific forms (ASAM, CalOMS, Service Connections, Referral Connections Log.

MSO KPI Dashboards 2.0

- Pulls information from the Managed Services Organization (MSO) side of KPI
- Primarily financial information between SAPC and the network.
- Requires a financial transaction for data to populate (billing, service authorization)

With the exception of PATIDs, information from KPI (PM side) cannot transfer over to MSO KPI and vise versa. Data is restricted to where the data point originated, either a PM form or an MSO form.

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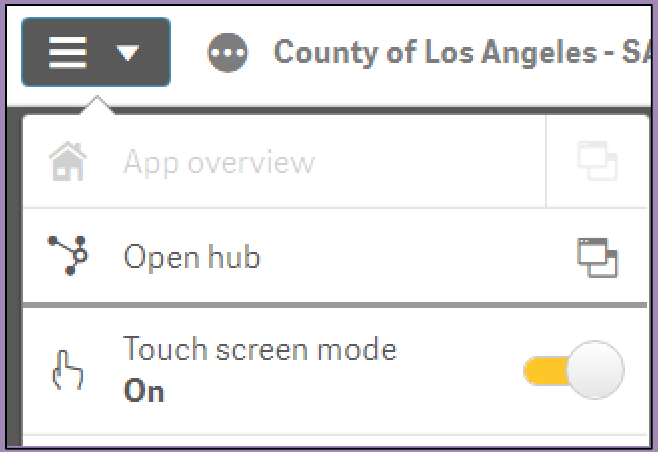
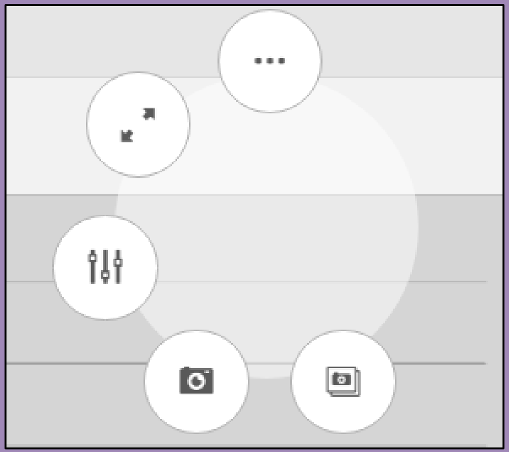
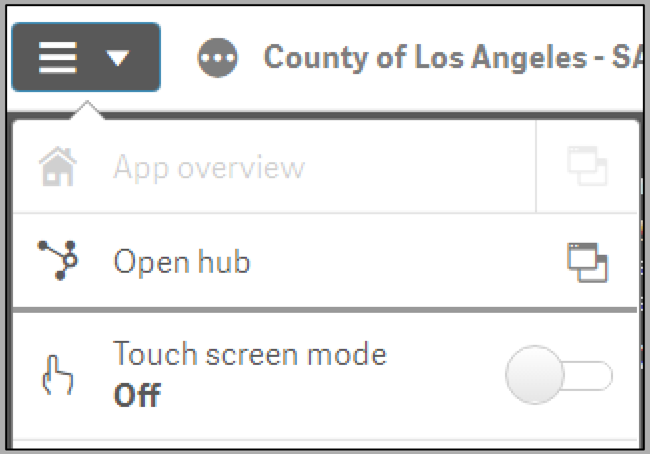
Orientation to MSO KPI Dashboards 2.0

Device Differences

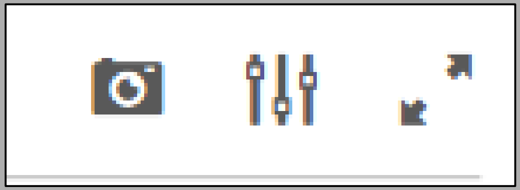


Touch Screen, Right Click Object

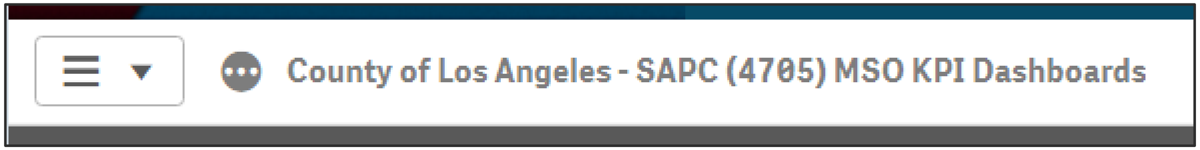




No Touch Screen, hover over right hand corner of object

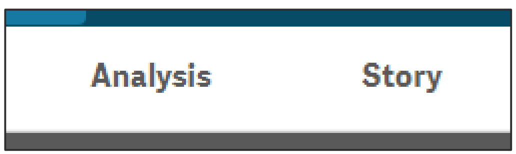


Dashboard Navigation



The drop arrow shows the App Overview.
The ellipses shows the last data load.

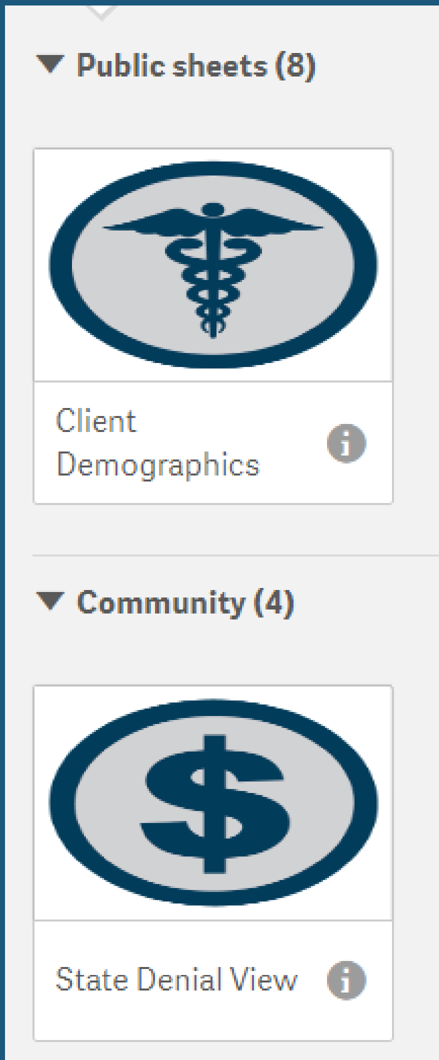
Shows the Sheets, saved Bookmarks (shortcuts to drill downs, and Stories based off snapshots



Analysis shows the data.
Story shows a collection of snips often used for reporting data.

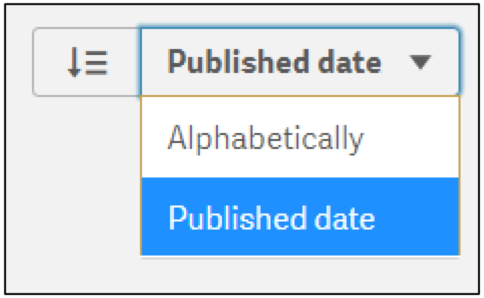
Allows for the transfer of PATIDs from one dashboard to another based on drill down selections

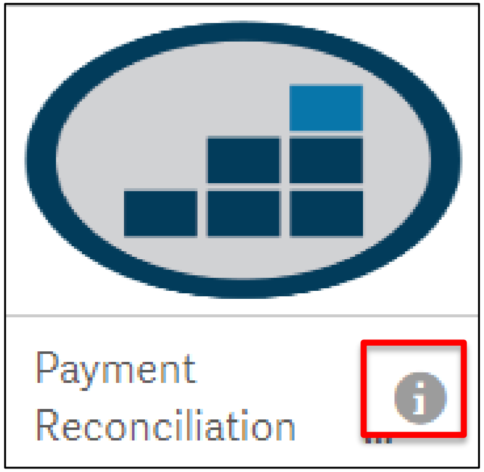
Sheets



- Public sheets are standard sheets for anyone using KPI. They cannot be altered or deleted.
- Community Sheets are sheets that have been created specifically for SAPC.
- If you have ideas on how to improve a sheet or would like to suggest the creation of a new sheet please submit a request to the Help Desk.
- Public and Community Sheets are visible to <u>all</u> users. Requests for updating/creation of a new sheet should include how the change(s) would benefit the network.
- Unfortunately, sheets cannot be modified or created where only specific users or agencies have access.

Community Sheets





- Community Sheets may be sorted alphabetically or by published date.

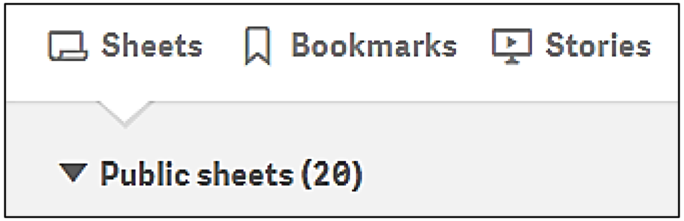
- By clicking on the “i” icon, additional information on the sheet will become visible.

Payment Reconciliation View
Published: Mar 3, 2020, 7:05 PM
Published by: sharm (NPC)

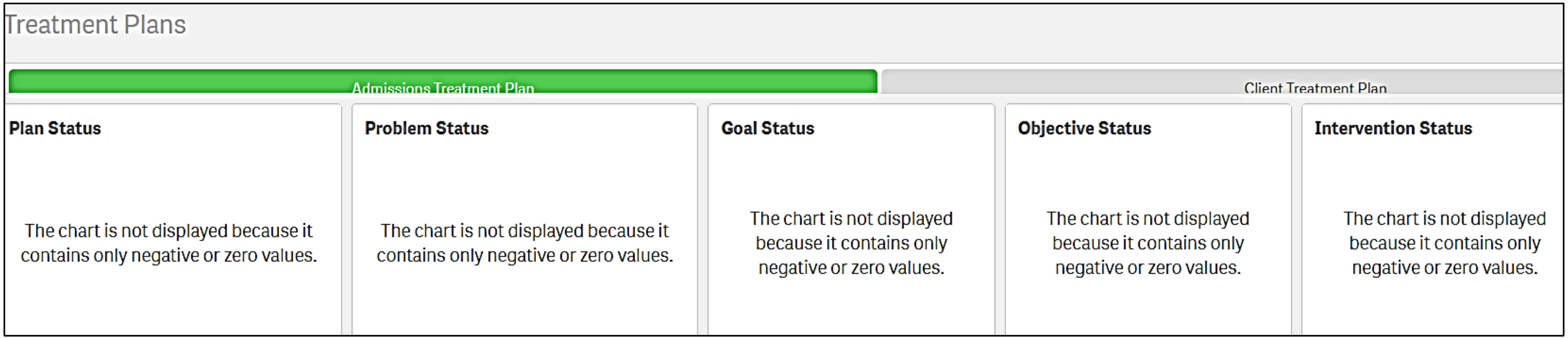
Overall this sheet has been created to meet the requirements of understanding the relationship between procedures that have been performed, claims that have been submitted, and payments that have returned as the result of an EOB. End users can select one or many data fields or data concepts to drill down deeper into the data set.

Blank Sheets/Objects

- You may encounter Public sheets or objects within Public sheets that do not populate information.



- Many of these sheets, especially on the KPI (PM side) do not populate with any information because the data points are based on myAvatar clinical forms which are not used by providers.



Objects

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Sheets are comprised of Objects, which offer a visual representation of data.

Tables, bar graphs, charts, KPIs (value of a particular measure)

Objects are comprised of dimensions, measures or combination of both.

Dimensions: variables that are viewed by categories: Location, Denial Type, Ethnicity, Claim Status, Contracting Provider Program.

Measures: variables, accounted for by a numerical value.

- How many, average, max, total, etc. It represents some sort of count.

The Drill-Down

Filters and Selections

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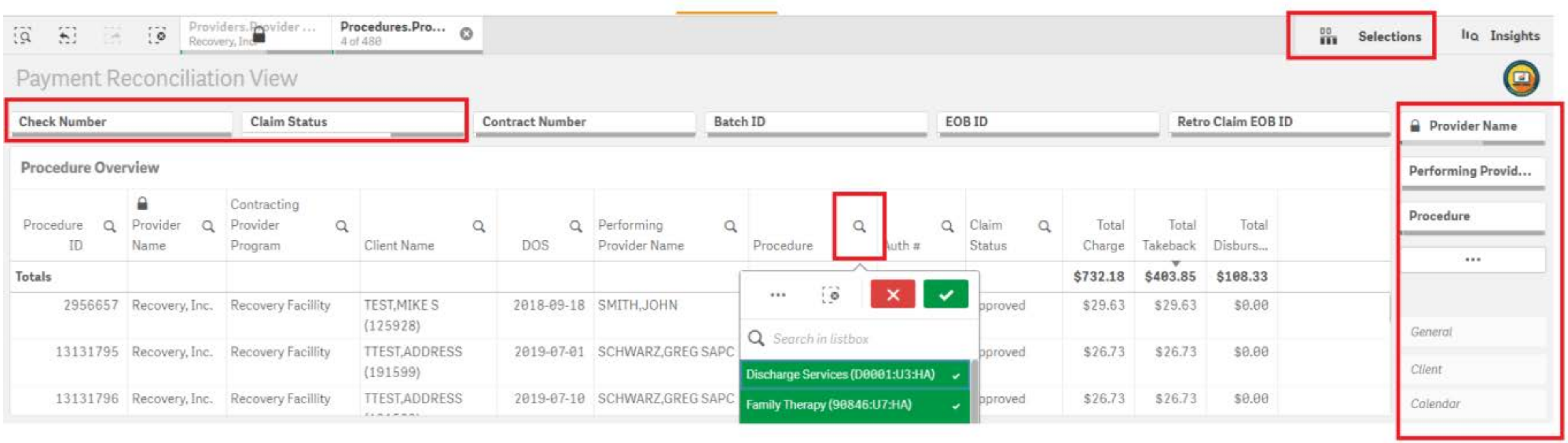
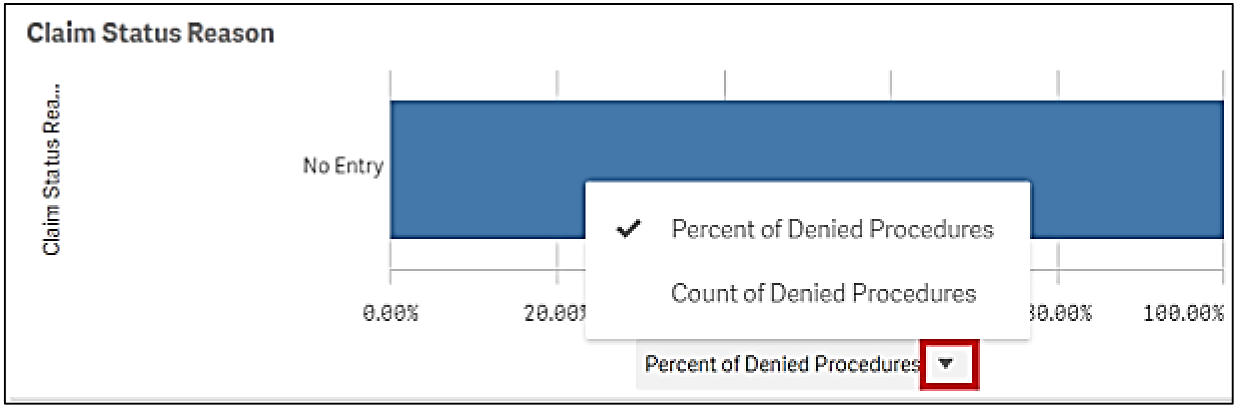
- To narrow down data, the drill-down process is used. This can be done in various ways (pgs. 12-21 of KPI User Guide 2.0)
  – Common selector
  – Filters at the top of the sheet
  – Click/click and drag within an object
  – Selections (for more advanced users)
  – Lasso within an object (typically a graph)



Alternative Object Views

- Graphs/charts may be viewed in picture or data table format
- Objects that are tables, like “Procedure Overview,” allow for column order to be switched as well as adjustment of the column width.
  - The changes revert to the default setting if you switch to the other Dashboard and/or when you log out.

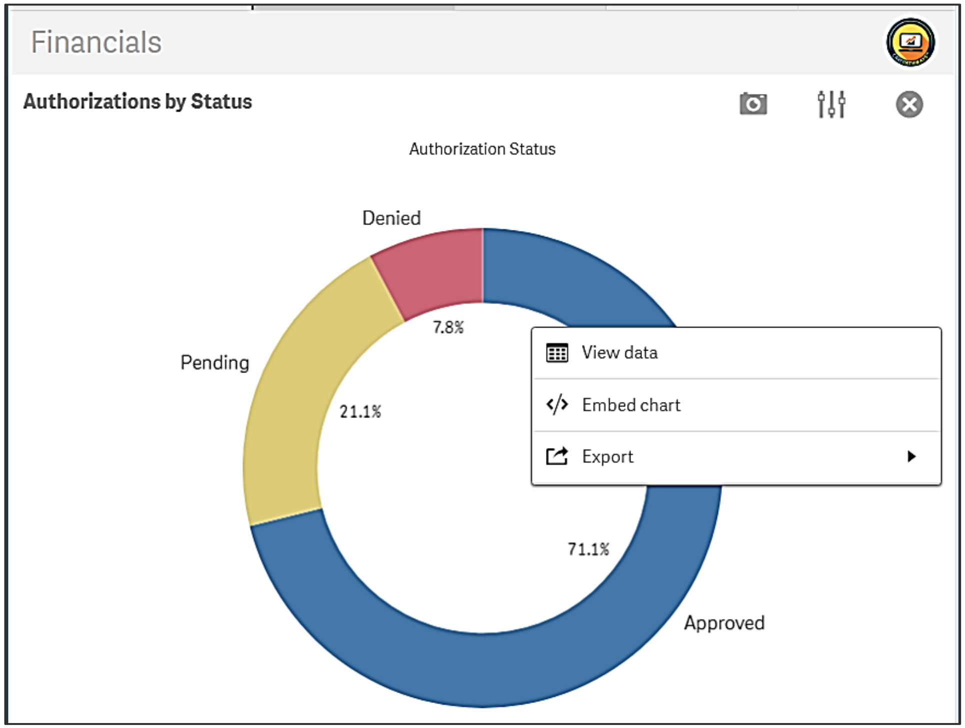


When you see an arrow on the label of a graphic, an alternative view is available.

Note: if you are on a small screen you may need to expand each object to see if there are alternative views.

Alternative Object Views

Chart View-Default



Data View

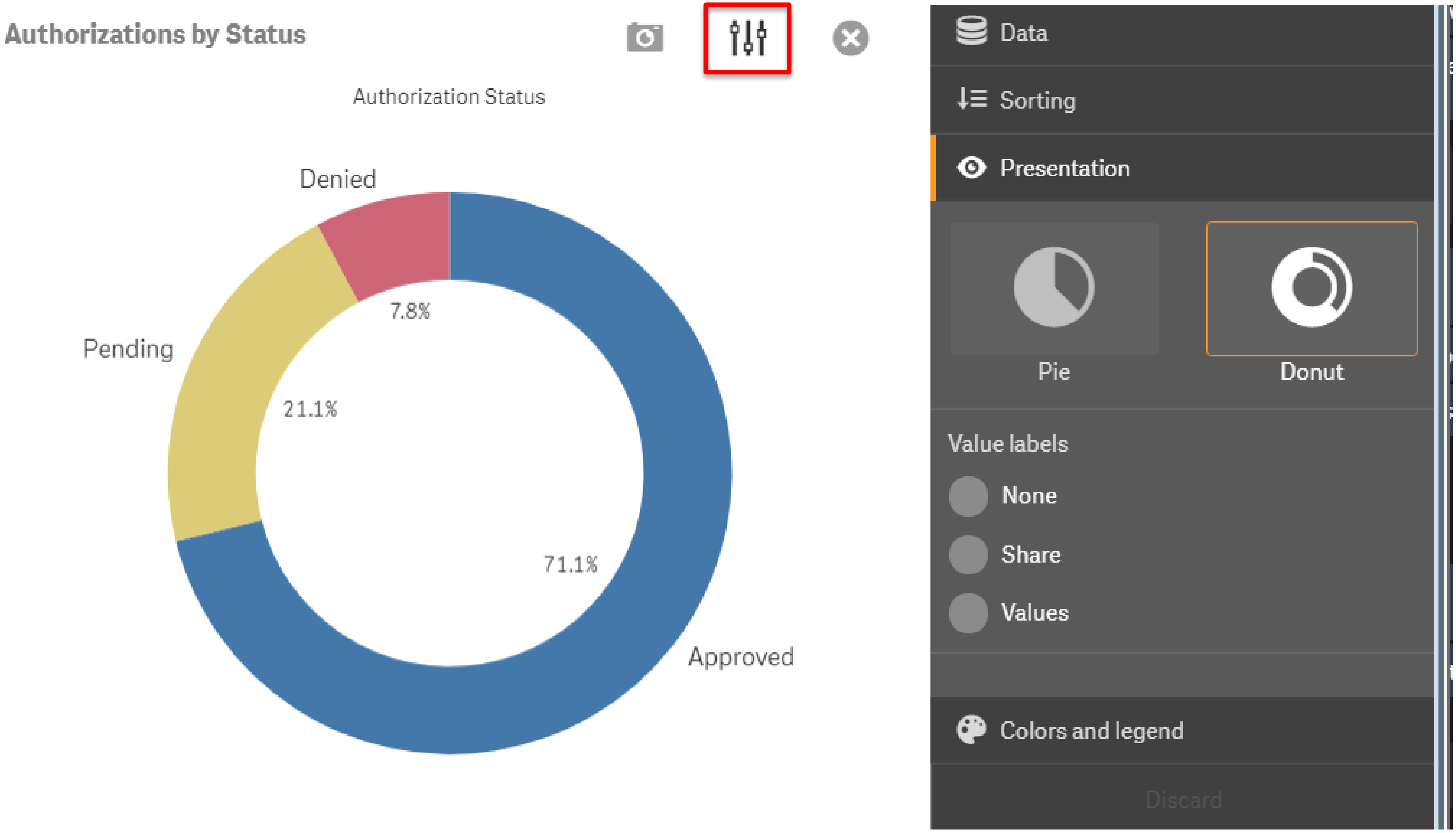
Financials

Authorizations by Status

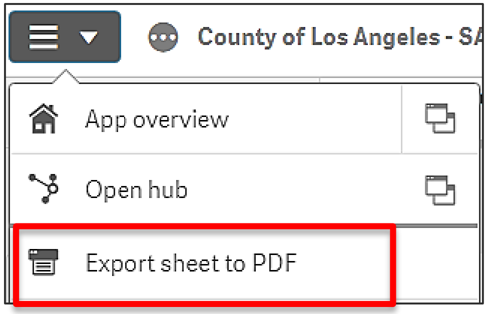
Authorization Status	Authorization Count
Approved	64
Pending	19
Denied	7

Exported data will always export as an excel table even if the graphic representation is a chart. To export the chart, you may export as a PDF.

Object Exploration



Exporting

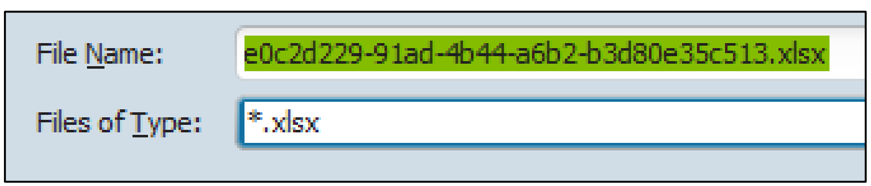


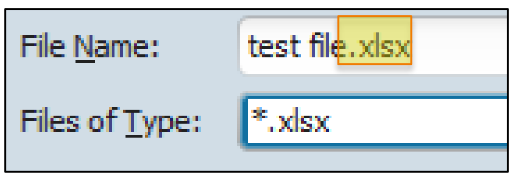
Exporting a whole sheet to PDF will only display what you see on your screen. If scrolling is needed to see data, it will not be captured in this export.

Within an object you can also export information.

- For better resolution use export as an image customize the pixels.
- To include information in reports consider exporting to a PDF.
- For analysis, tracking, internal record keeping export data to excel.

When renaming the exported file include the extension ".xlsx" or ".jpg" or ".pdf" in the actual file name.





Failure to add this extension will result in difficulties opening the file.

Year Selections

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Fiscal Year

Fiscal Year in KPI/MSO KPI is defined as the end year of the fiscal year range.

FY 18-19 is FY2019 in KPI

FY 20-21 is FY2021 in KPI

Fiscal Half for FY2021

H1= July 2020-December 2020

H2= January 2021- June 2021

Fiscal Month Number

FY2020-1 equals July 2019

FY2020-12 equal June 2020

Calendar Year

Follows standard calendar year

Requires more selections if attempting to review full fiscal year information

Options for year, half, quarter, month and week (Sun-Sat)

MSO KPI Dashboards 2.0: Utilizing the Data

How Providers Can Use MSO KPI

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Detailed claim information

- Payment Reconciliation, Claim Denial, State Denial

Check and EOB information

- Operational Details (EOB Details), Payment Reconciliation

Utilization

- Authorizations, Procedures, Operational Detail (Authorization Detail)

Productivity- in development

Recoupments

- State Denial, Payment Reconciliation

Data needed for grant or contract proposals (RFP)

- Client Demographics, Operation Details

General Information Available in MSO KPI

Client demographics

Authorizations and Procedures

Financial

Patient Data

In general MSO KPI, is related to patient data in some way, but there are specific sheets dedicated to demographic information

- Client Demographics
- Client Details

MSO KPI patient sheets are limited to patients who have a *financial transaction*

- Patient for whom providers have billed or submitted an authorization are available in MSO KPI Sheets (depending on selections)
- Missing data, incomplete or inaccurate data is related to it not being entered in Sage, either due to policy or provider error or entered incorrectly or is outside the range of the Dashboards’ data range.

Client Demographics Sheet

- All vs. Active Clients filter

All clients are active in Sage

- Reminder: Data shows what is entered in the system

From Client Demographics in Sage, where many fields are not required

The age interval changes the age distribution graph only

Useful to view different age categories

- Age Interval

Los Angeles, East Los Angeles, LA

Not in Labor Force has 4 subcategories which is different than Unemployed

- Multiple selections may be needed to get desired data

Client Details Sheet

Able to analyze specific clients that match the filters/parameters

Provides the same demographic information as other sheet, but on an individual patient level

Authorization and Procedures Data

Authorization information

- Groupings/LOC
- Claims against an authorization
- Date Sort should be changed to an authorization related option. The default for sheets is to sort data by date of service.
- Disbursements by agency, site, performing provider or procedure

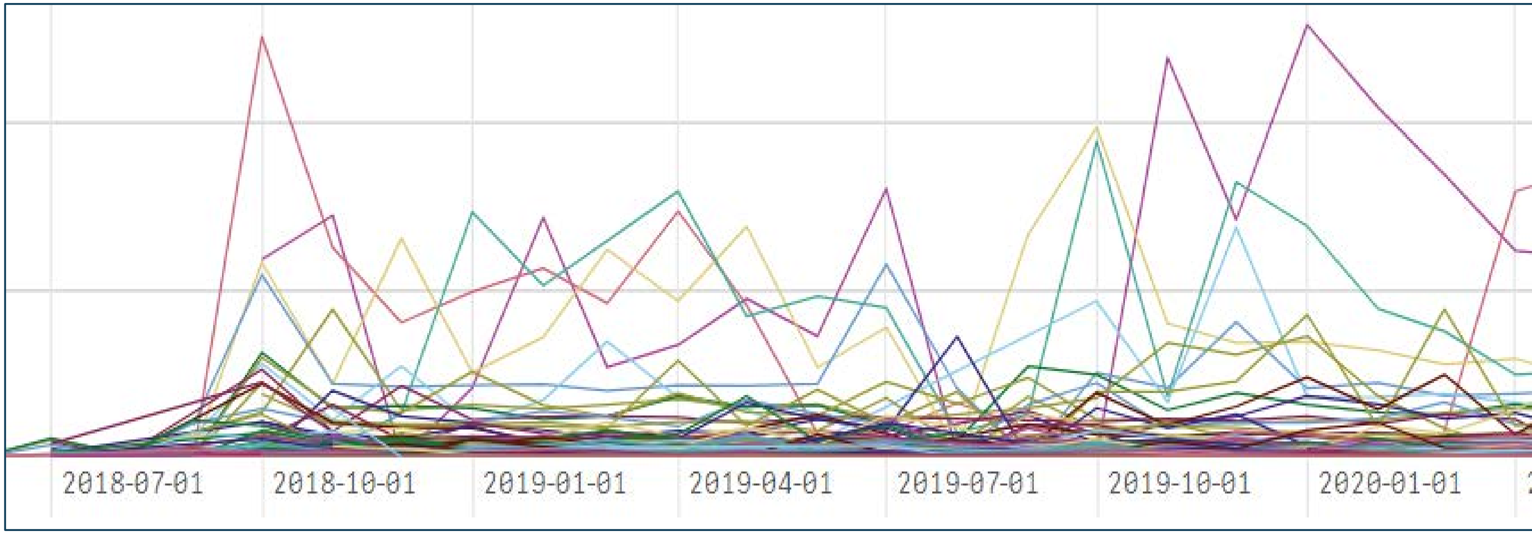
Procedures Information

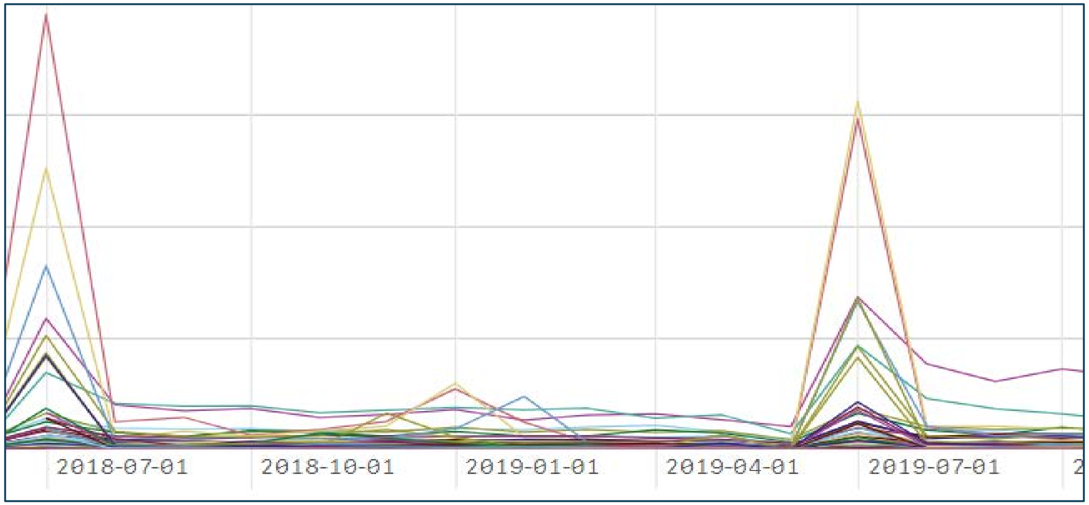
- Great for trend analysis.
- Is billing occurring steadily or erratically?
- Are the types of services offered consistent with the LOC requirements.
- Are certain services under utilized?
- Limited productivity information

Know What You Are Looking At

Same Procedures Sheet with the same filters… The difference is the Date Sort

Sorted by Date of Service



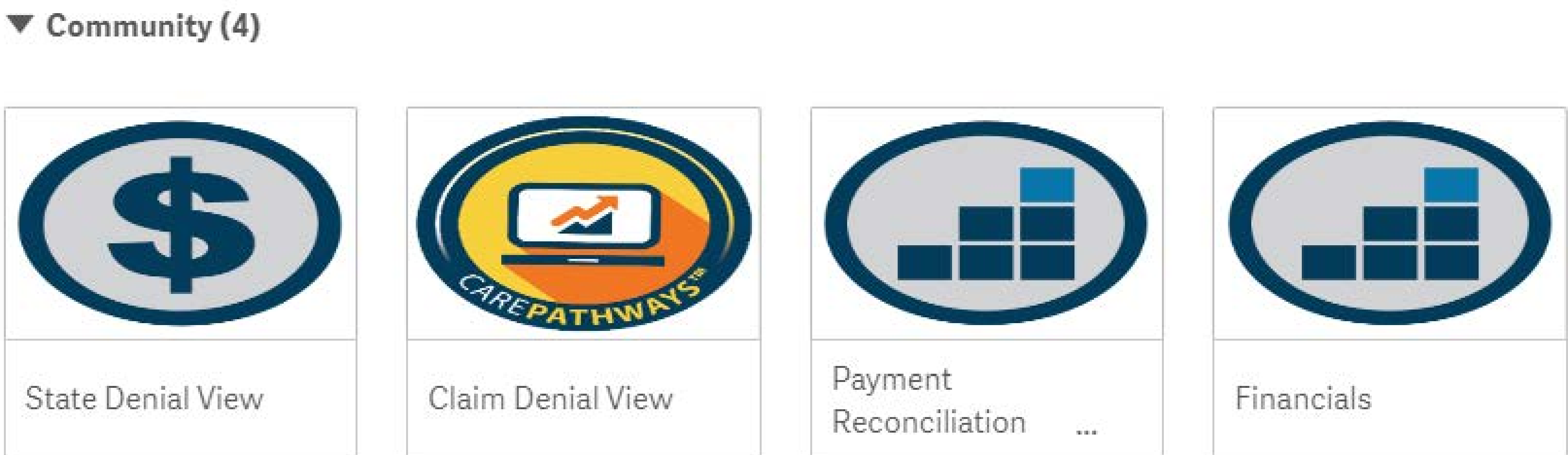


Sorted by Authorizations.Begin Date of Auth

Financial Data

Primary Community Sheets for Financial information

- Payment Reconciliation View (updates pending)
- Claim Denial View
- State Denial View (updated June 25, 2020)
- Financials



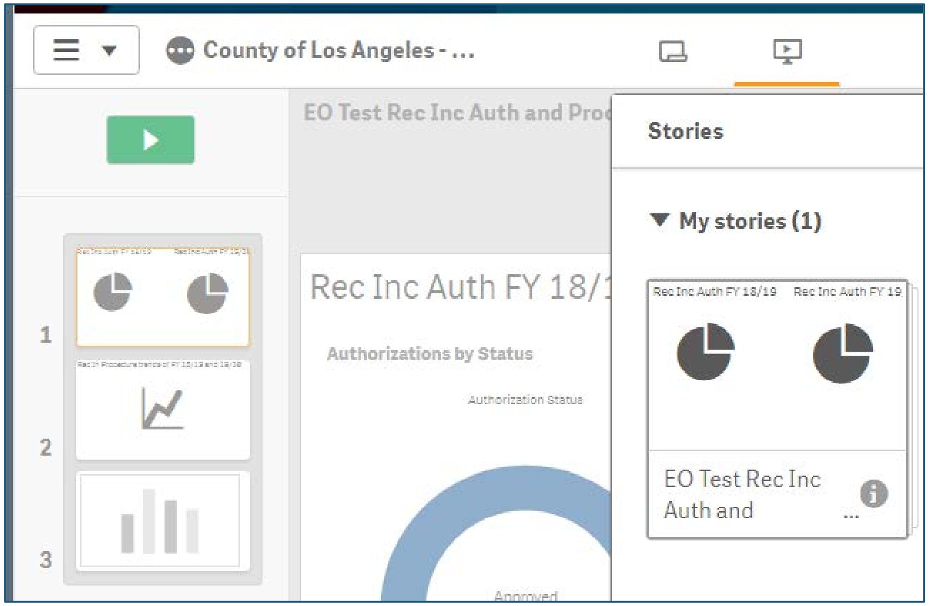
Bookmarks

Bookmark feature is a great shortcut if you are reviewing information with the same parameters.

- Only a specific site
- Specific Date Rage
- Specific Service codes
- Bookmark is set to a specific sheet.

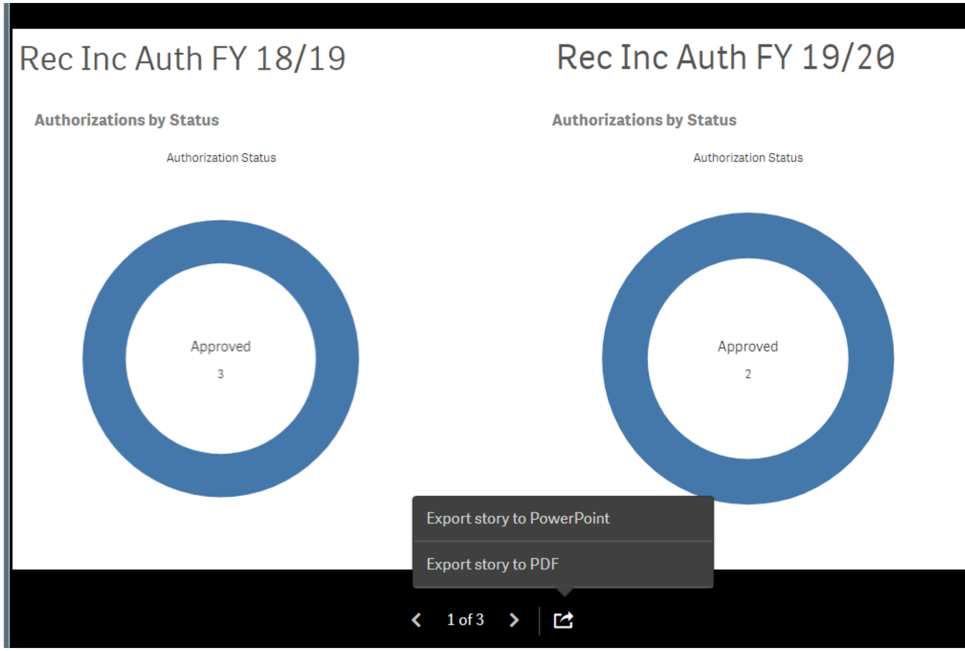
Bookmarks can be accessed from the app overview so you don't even have to open a sheet. By selecting your bookmark it will take you directly to the desired sheet with the saved parameters

Stories



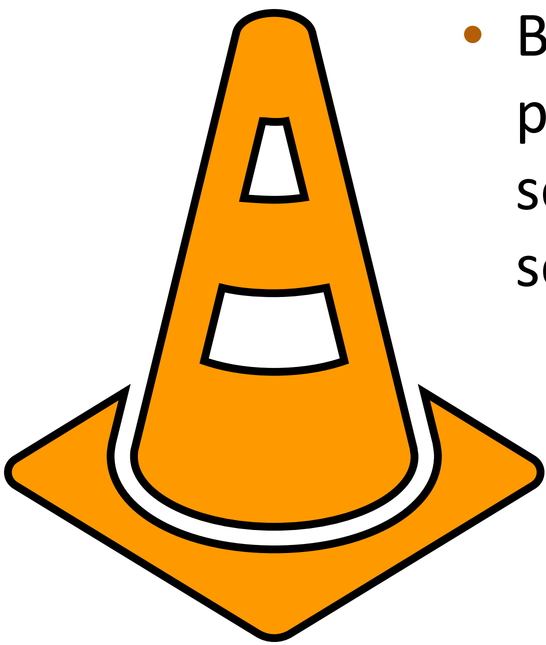
- Stories allow for the creation of a presentation based on snapshots.

- The presentation can be played directly from KPI or exported to PP or PDF.
- When played in KPI, you can include an active sheet so you can do a live demo without exiting Stories.



Upgrades and New Additions

Development



- Not all fields are readily available in KPI or MSO.
- There are a hundreds of tables with thousands of fields some of which have similar information
- Before new sheets or updates to sheets are published they go through a validation process so the data you see is what is intended to be seen.

In the Works

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Productivity

Credentialing

State Denial Pattern tracking

Non-claim based tracking of payments/takebacks.

Specialty population specific information

Access to Care

Summary

KPI data is pulled from various data elements within Sage and converted into readable objects and tables within each sheet.

Community Sheets were developed specifically for SAPC use.

Analysis is based on the particular question being asked.

Filters are used to “drill-down” into the data to get those specific answers.

Data is in the eye of the beholder.

Remember to check filters, selections and other elements to verify the data is being displayed correctly.

Bookmarks are useful for repeat data.

Stories can be great tools for presentations to tell the story of the data.

Additional Resources

Help Desk 855-346-2392
https://netsmart.service-now.com/plexussupport

Finance Analyst

For Local Claim Denial Investigation: SAPC Start ODS All Provider Meeting January 28, 2020.

For State Denial Investigation and Resolution: June 25, 2020

KPI trainings and User Guide: ProviderConnect→ Documentation→ Help→ Sage Training and Other Materials (left hand side panel).

Questions

Contact Information

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- UM Questions/Check Status of Authorizations:
  SAPC.Qi.UM@ph.lacounty.gov
  (626) 299-3531