



Leveraging KPI to Approximate Max/Current Number of Beneficiaries for NACT Reporting

September 20, 2023





Disclaimers

The KPI demonstration is in a training environment and does **NOT** contain protected health information (PHI).

- KPI Limitations
 - The sheets reviewed are dependent on billing. So, if it wasn't billed, it won't be there.
 - There is no financial eligibility information in MSO KPI, so this will overestimate the number of Medi-Cal beneficiaries.
 - Financial Eligibility can be found on PM KPI under Financial Eligibility for Providers sheet.
 - However, claims data is limited to state adjudications, which may underestimate the number of Medi-Cal beneficiaries.



Client Detail Sheet

- This gives a unique client count based on selected filters
- The Date of Birth field may be used to calculate the age at the month of service once data is exported
 - The Age field is the age at the time you are running the data.
 - Age grouping may also be determined by Auth_Grouping_Code for FY22/23.
- Recommended for smaller agencies with few sites, with a single modality and age grouping per site, and smaller number of staff.
- Run the sheet by site each month and select the highest number to approximate the max number of beneficiaries.
 - Additional needed filters: site, funding source, FY, month, auth grouping.
 - Add practitioner to get staff's max beneficiary.



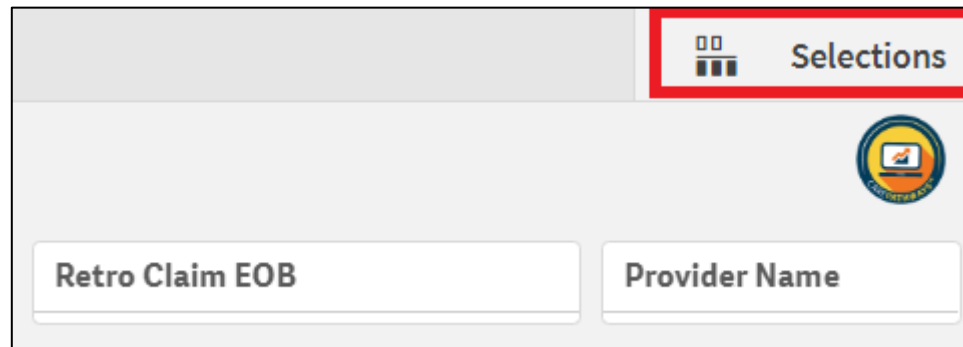
Payment Reconciliation Sheets

- Recommended for larger agencies, sites with multiple modalities, sites with multiple age groups, and/or large number of staff.
- Exporting this sheet will allow for the analysis of number of clients by Site and Practitioners.
- Depending on the drill down method, age grouping and modality may also be obtained from this sheet.

- **Provider Name**
- **Contracting Provider Program** (especially for larger agencies where there is too much data for the object to load).
- **Fiscal Year: FY2023**
- **Month:** Data will be exported by month. (July 2022-June 2023)
- **Funding Src ID:** DMC funding source on Service Authorization
(must use Selections to find Funding Src ID 1)
- **Age Grouping:** can be done by **Auth_Grouping_Code** FY 22/23, modifiers noted in the **Procedure**, or using **Client Details** DOB.
(must use Selections to find **Auth_Grouping_Code**).
 - Age groupings were removed from the naming convention for levels of care in FY22/23, must use modifier or DOB.
- **Performing Provider:** Practitioner may easiest to evaluate once data is exported.

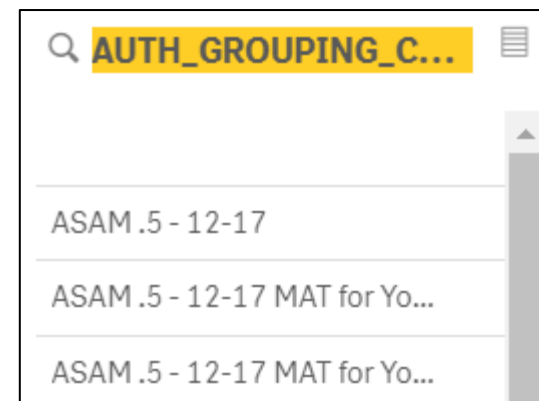
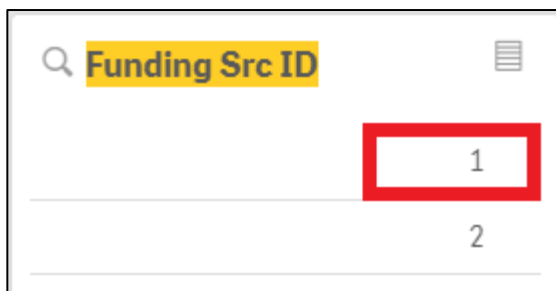
Selections

- Funding Src ID and Auth_Grouping_Code can only be found with Selections.



App dimensions Show fields

Search dimensions and fields





Recommended Data Pulls for Max Beneficiaries

- Run by Month (12 exports for July 2022-June 2023)
- If a site has multiple modalities but only one age grouping (12-17 or 18+), run by Month and Auth Grouping associated with Modality (Outpatient, IOP, OTP, Residential)
 - Or you will need to filter out by procedure code to look at the first U-Code (U7; U8; UAUG; U1,U2,U3)
- If a site has multiple age groups, run by Month and Auth grouping associated with modality and age groupings (12-17, 18+, 21+)

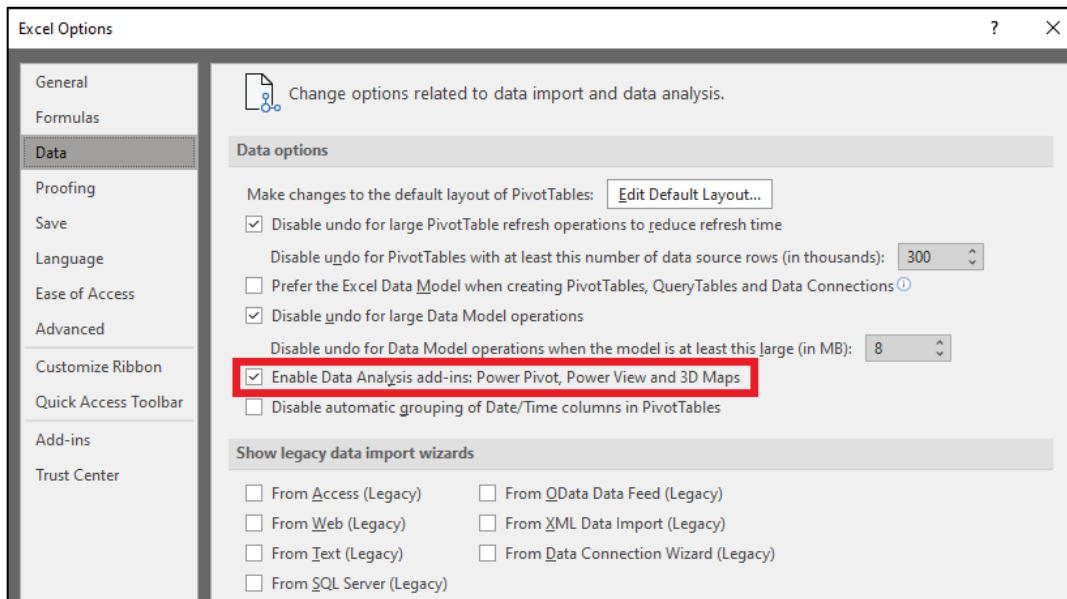
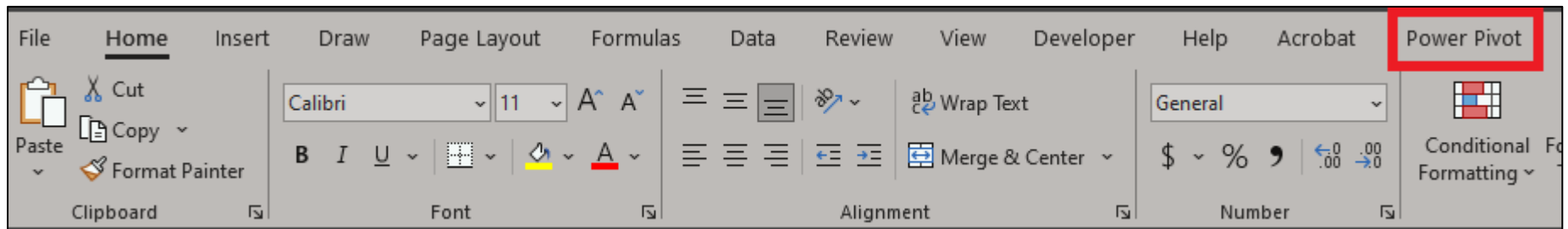


KPI Export



Manipulating the Export

- Power Pivot or Regular Pivot Tables



If you don't see Power Pivot on the toolbar, go to File> Options> Data> check of the box in red



Power Pivot

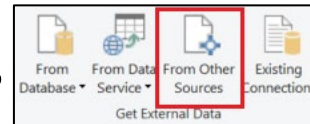
- Will allow you to create a Distinct Count for Clients.

1. Export KPI Sheet, save it, and close it.

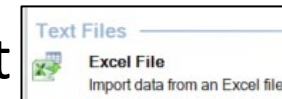
2. Open a blank Excel and click Power Pivot

3. Click Manage 

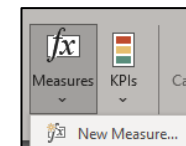
4. Click From Other Sources



5. Select Excel File and open saved KPI export

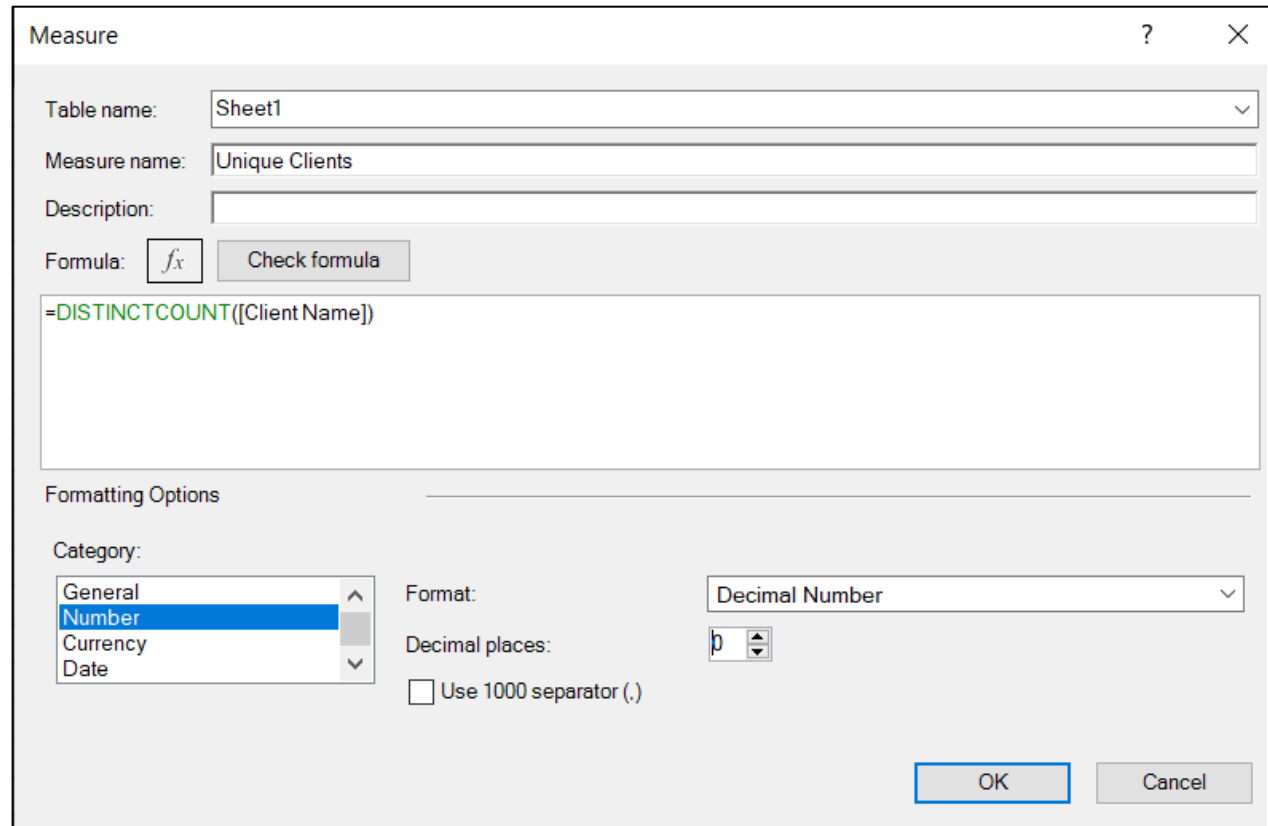


6. Click on Measure and select New Measure



Creating a New Measure

This formula will count the Client 1x instead of summing up the number of rows with a client name.



Measure

Table name: Sheet1

Measure name: Unique Clients

Description:

Formula: Check formula

=DISTINCTCOUNT([Client Name])

Formatting Options

Category:

- General
- Number**
- Currency
- Date

Format: Decimal Number

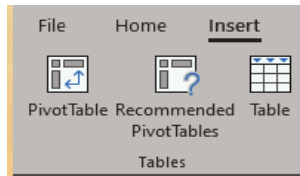
Decimal places: 0

Use 1000 separator (,)

OK Cancel

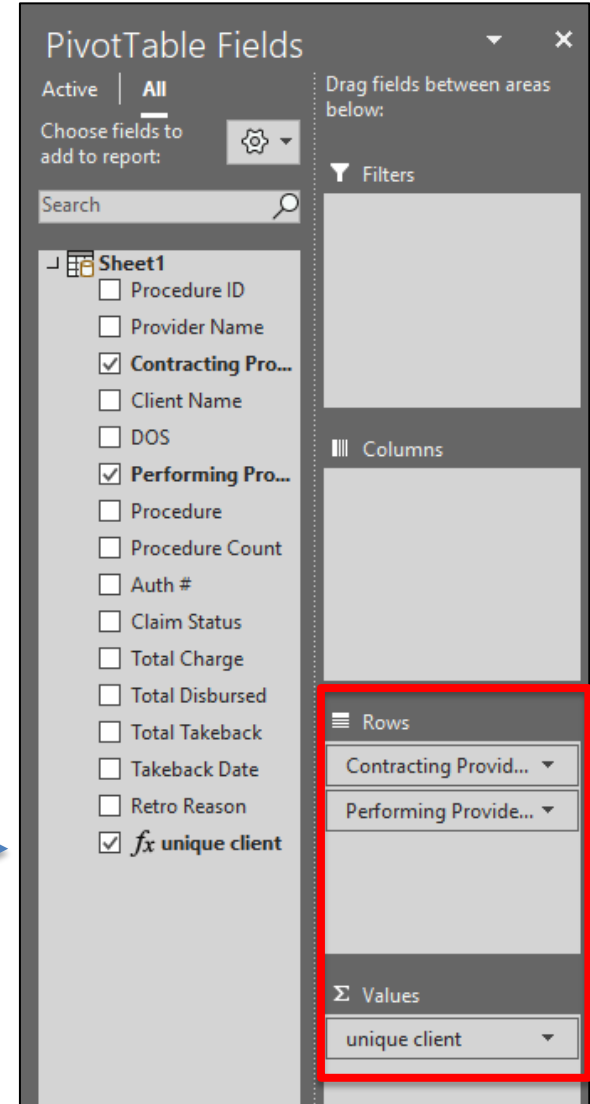
Power Pivot

7. Create a new Pivot Table



8. Select the fields to create the pivot table

The bottom field is the newly created measure that will give the distinct count.



TESTING DATA, NO PHI

- Sample output of Power Pivot

Row Labels	unique client
ACFW 1135 South Alvarado St	
ABSON, CHARLOTTE	7
BANDZHARDZHIAN, SUZANNA	4
BERRY, NICAEA	3
BRADSHAW, SHERRY	2
COBOS, MICHAEL	1
COMBS, JOZETTE	1
DAVIS, DEBRA	1
JACKSON, CHARLENE	2
JOHNSON, ESPONOLA	2
MACIAS, CINDY	1
MALERBA, LINDA	3
MAYS-MANNING, CARRIE	1
OLIVAREZ, RICHARD	1
USERSH, TEST	1
ACFW 1147 South Alvarado St	
ABSON, CHARLOTTE	2
BANDZHARDZHIAN, SUZANNA	2
BERRY, NICAEA	1
BRADSHAW, SHERRY	2
BURTON, SARAH	1
BURTON, SHARON	1
CALANDRINO, ANDREA	1
DAVIS, DEBRA	1
GONZALES, GENEVA	1
GONZALEZ, BALDOMERO	1
MALERBA, LINDA	1
OLIVAREZ, RICHARD	1

Contracting Provider Program. This can be filtered with the down arrow on Row Labels

These are the Performing Practitioners that had billing for that site. The unique client count is reflected in the next column

If multiple sites are exported from KPI they will be all listed unless filtered.

Regular Pivot Table with NO Power Pivot

- The unique client count cannot be calculated in a regular pivot table. However, the same fields can be added as variables.

Row Labels
ACFW 1135 South Alvarado St
ABSON, CHARLOTTE
DOE, ADEL (160367)
DOE, MARTHA (160368)
HONG, ANA (160468)
KIM M, MALKOVICH (121700)
LANE, LEI (160473)
O'DONNELL, HELOISA G (1682)
TEST, RACHAEL (159925)
BANDZHARDZHIAN, SUZANNA
DOE, ADEL (160367)
KIM M, MALKOVICH (121700)
LANE, LEI (160473)
SCREEN, TEST (160056)
BERRY, NICAEA
CHELSEA D, MINICHILLO (6548)
DOE, ADEL (160367)
KIM M, MALKOVICH (121700)
BRADSHAW, SHERRY
HONG, ANA (160468)
LANE, LEI (160473)
COBOS, MICHAEL
LANE, LEI (160473)

Contracting Provider Program

Performing Provider who had billing for that site.

These are the clients associated with the practitioner at that site. The rows of clients would need to be counted to get a client count.



NACA Data





Compiling Data for Max Beneficiaries

- Create a summary sheet or a separate notebook.
- Compare the data at the site level from month to month.
- Use the highest number for the max value
 - This should also be done by site/modality/age grouping if the site has more than one modality and/or age grouping.
- Compare the data for the practitioner by site from month to month.
- Use the highest number for the max value if there is no set caseload expectation. (Ex. Supervisors don't typically have a caseload)



Current Beneficiaries

- Definitions
 - Site: The total number of active Medi-Cal patients at this location as of **March 31, 2023**
 - Practitioner: The number of Medi-Cal patients that are currently on a practitioner's caseload (or the number of Medi-Cal patients that are being served by the practitioner at the time of reporting)
- The Payment Reconciliation sheet is based on billing, which may or may not be current at the time of NACA entry if the agency was not able to complete billing due to contract augmentations.



Resources





Contacts

Contact	Method of Contact
Esther Orellana, Ph.D. KPI Liaison	Email: Eorellana@ph.lacounty.gov Sage@ph.lacounty.gov
NACT General Questions	Email: SAPC_NACT@ph.lacounty.gov
Sage Help Desk KPI log in issues, data issues	Portal: https://netsmart.service-now.com/plexussupport (preferred, include snips) Phone: (855) 346-2392