KPI 101

An Introduction to the Dashboards

Agenda

- General overview of the Dashboards
- Navigation of the Sheets
- Drilling down
- Review of available Sheets
- How to request access to KPI

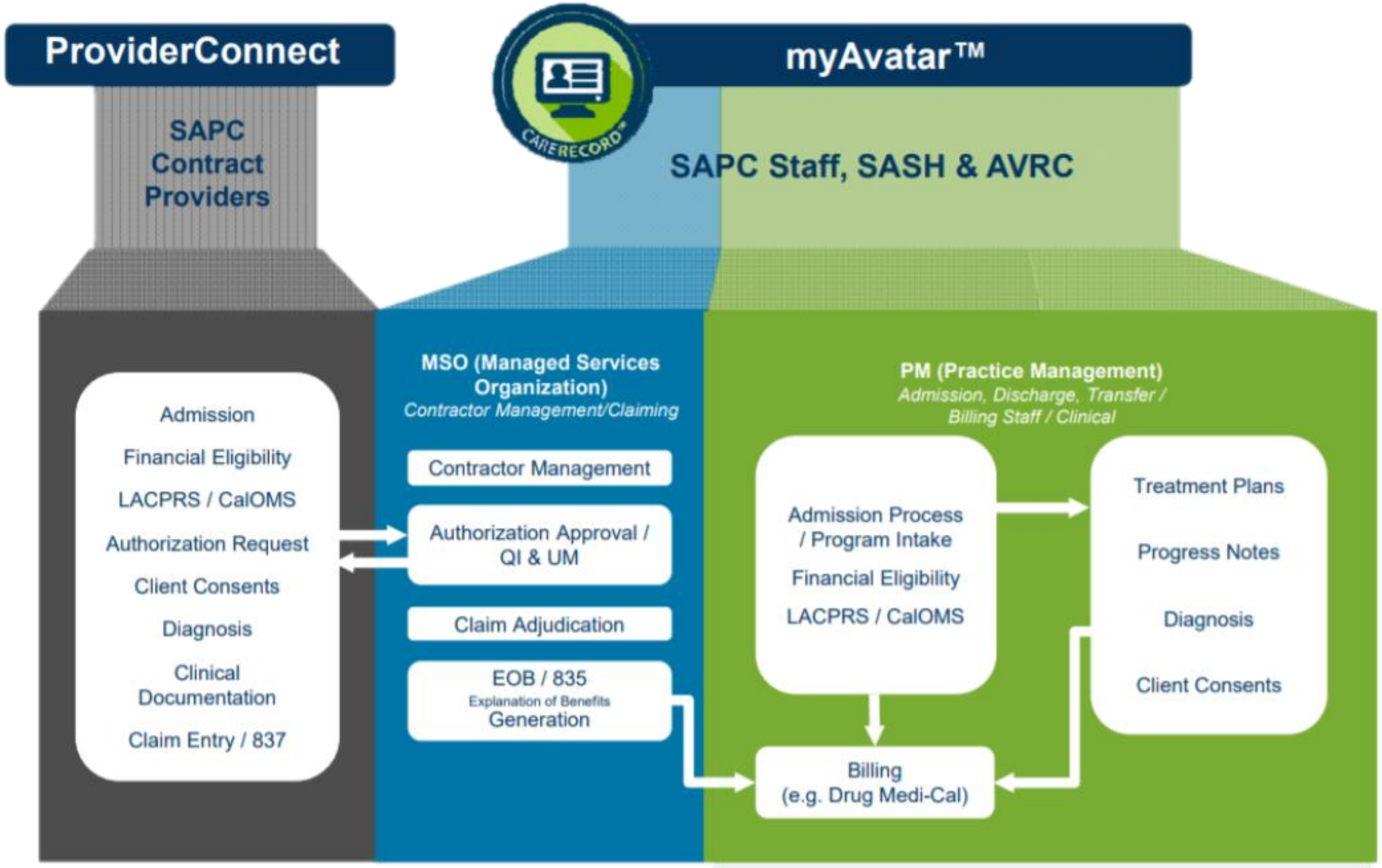
Dashboards

General Overview

What is the Purpose of KPI

- KPI Dashboards provides refreshed views for clinical, financial and operational data of select Key Performance Indicators (KPIs), as well as the ability to filter aggregated data by program, service type, patient and more.

From Where Does KPI Data Come?



myAvatar™

- All KPI data is pulled from myAvatar.
- Information gets into Avatar from ProviderConnect and 837P/I files.
- If it doesn't exist in myAvatar it cannot be pulled into KPI

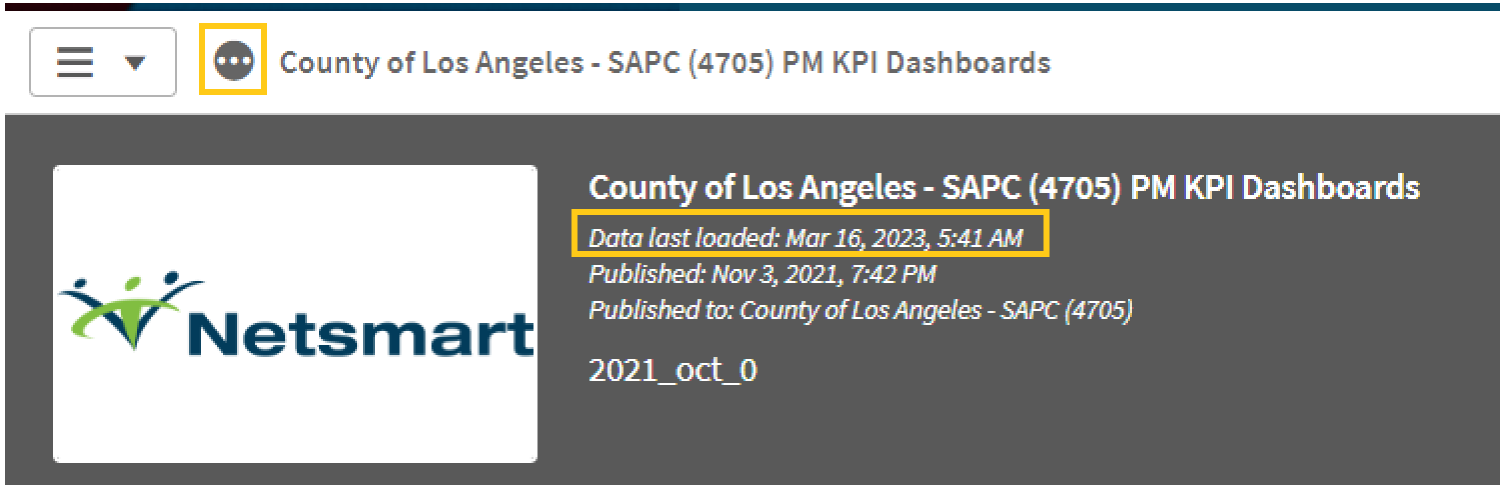
Data Availability

- 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.
  - This range was temporarily extended to allow visibility on older claims during the cost reporting process.
- Data is truncated 2x a year
  - January 1st
  - July 1st

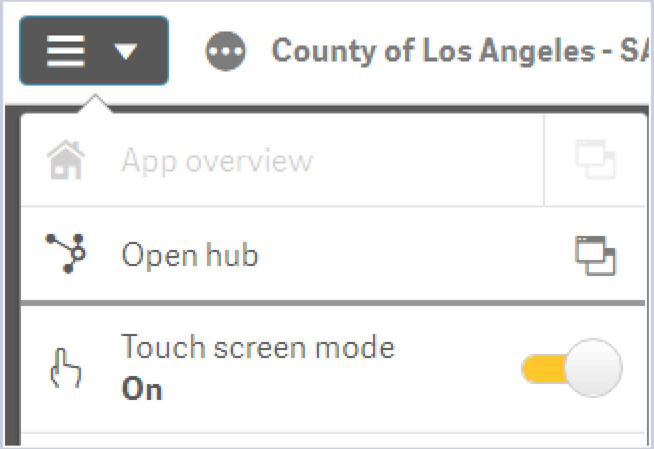
CURRENT DATE	AVAILBLE DATA RANGE
April 1, 2023	Extended Data available: FY19/20
	Fiscal Year Available: FY 20/21, FY 21/22, FY 22/23
	Calendar Year Available: 2019 (H2), 2020, 2021, 2022, 2023
	Date Range: July 1, 2019 to March 31, 2023
July 15, 2023	Extended Data available: TBD
	Fiscal Year Available: FY 21/22, FY 22/23, FY 23/24
	Calendar Year: 2021 (H2), 2022, 2023
	Date Range: July 1, 2021 (TBD) – July 14, 2023

Nightly Loads

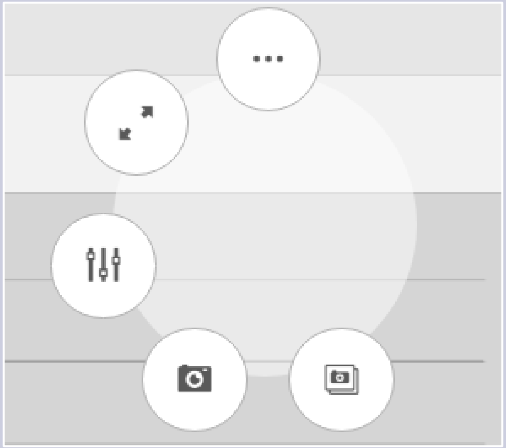
- Data is not live and will only be available for items prior to the "Data last loaded."
- Verify when the last completed load occurred.
- KPI (PM side) and MSO KPI load at different times.

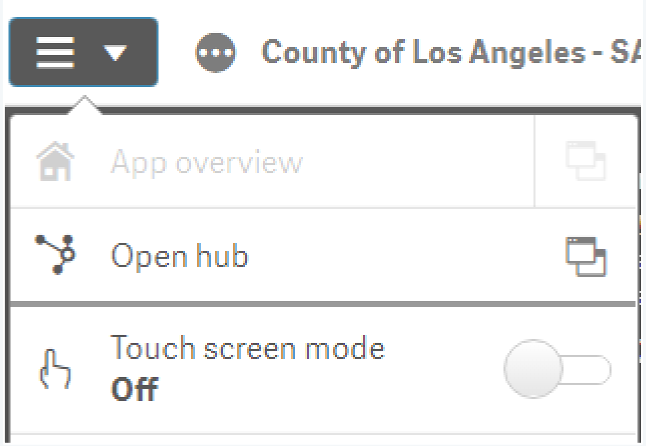


Device Differences

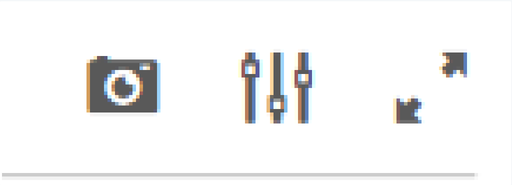


Touch Screen, Right Click Object





No Touch Screen, hover over right hand corner of object



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

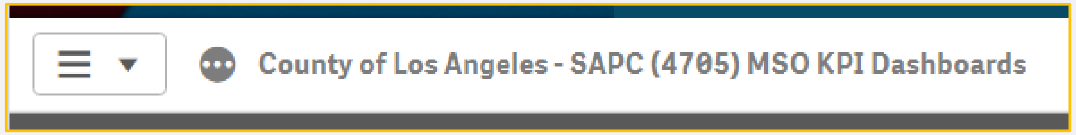
Pulls information from the Managed Services Organization (MSO) side of KPI

Primarily financial information between SAPC and the network.

Requires a financial transaction for data to populate (billing, service authorization)

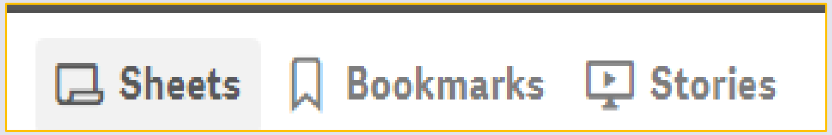
With the exception of PATIDs, information from KPI (PM side) cannot transfer over to MSO KPI and vise versa. Data is restricted to where the data point originated, either a PM form or an MSO form.

Dashboard Orientation



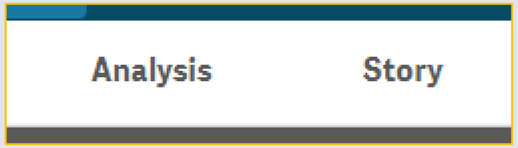
- The drop arrow shows the App Overview.
- The ellipses shows the last data load.

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



Shows:

- Sheets,
- Saved Bookmarks (shortcuts to drill downs)
- Stories based off snapshots



Once a sheet is selected:

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

Sheets

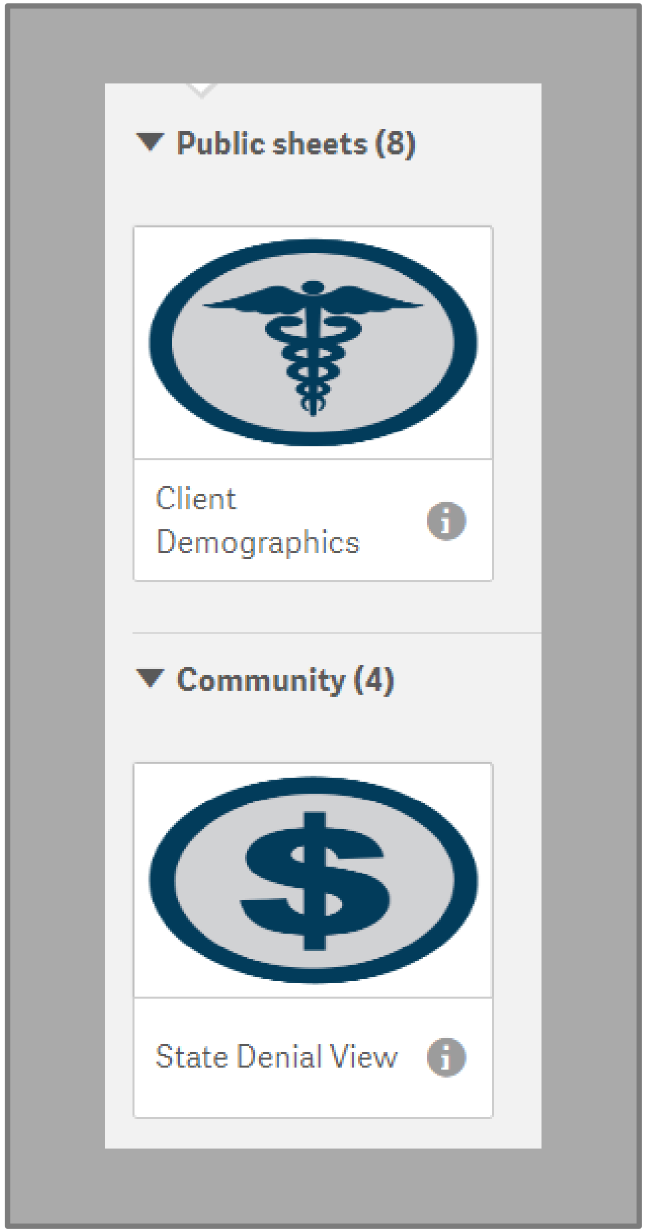
- **Public sheets** are standard sheets for anyone using KPI. They cannot be altered or deleted.

- **Community Sheets** are sheets that have been created specifically for SAPC.

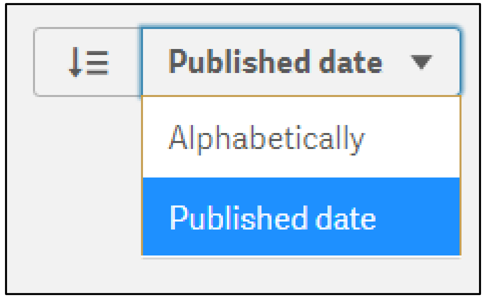
- If you have ideas on how to improve a sheet or would like to suggest the creation of a new sheet please submit a request to the Help Desk.

- Public and Community Sheets are visible to all users, SAPC and Contracted Providers alike. Requests for updating/creation of a new sheet should include how the change(s) would benefit the network.

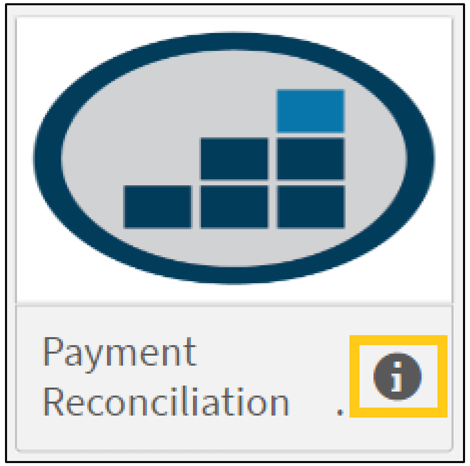
- Unfortunately, sheets cannot be modified or created where only specific users or agencies have access.



Community Sheets



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



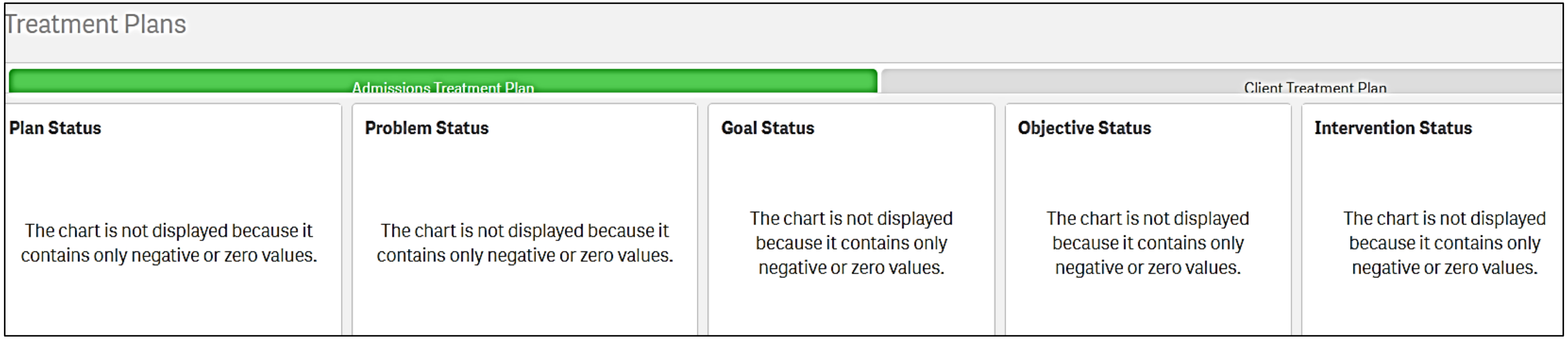
- By clicking on the "i" icon, additional information on the sheet will become visible.

Payment Reconciliation View
Published: Nov 16, 2022, 8:36 AM
Published by: ORELLANA, ESTHER (KPI_USERSTORE)

This sheet was updated 11/16/2022.
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

- Public sheets or objects within Public sheets may 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 Netsmart specific forms which are not used by SAPC.

Objects

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.

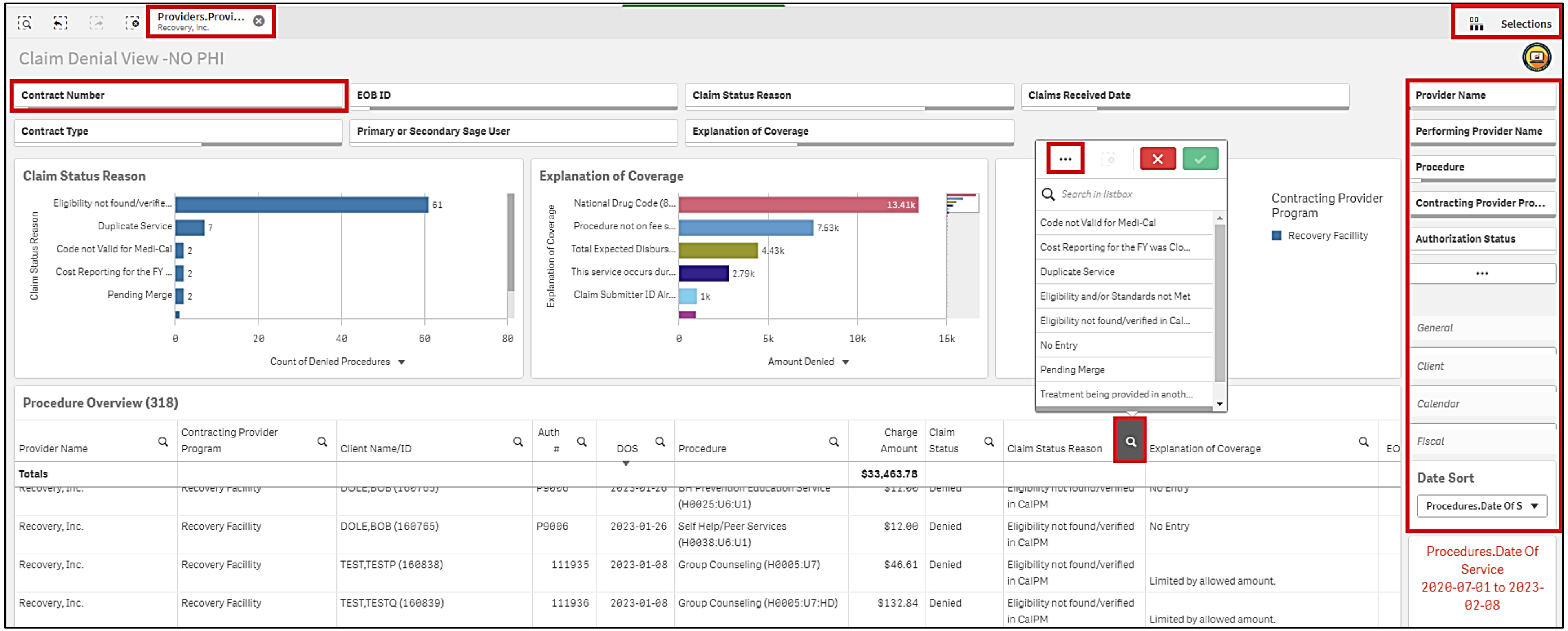
Measures: variables, accounted for by a numerical value.

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

The Drill Down

Filters and Selections

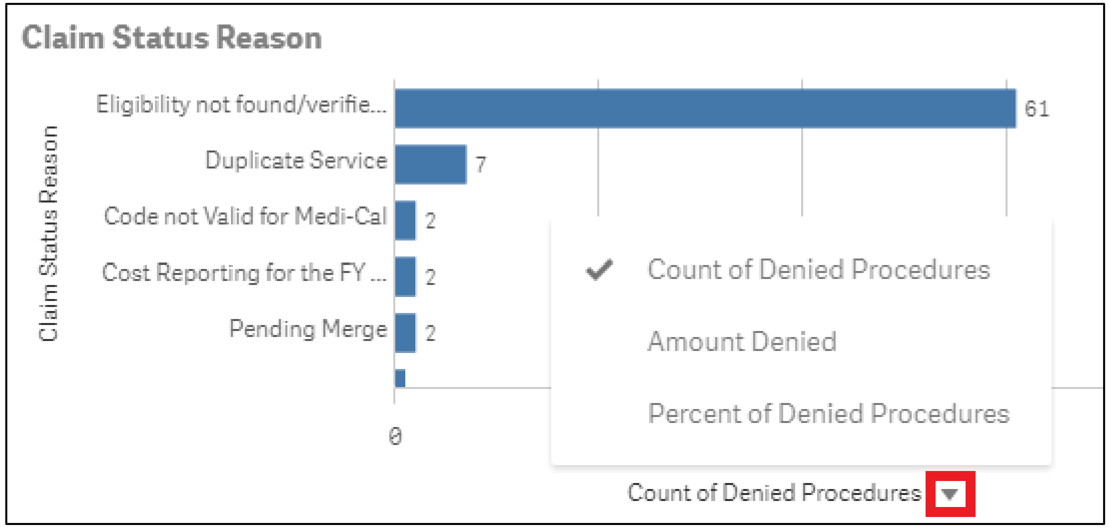
- To narrow down data, the drill-down process is used. This can be done in various ways (pgs. 12-21 of KPI User Guide 2.0)



- 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.

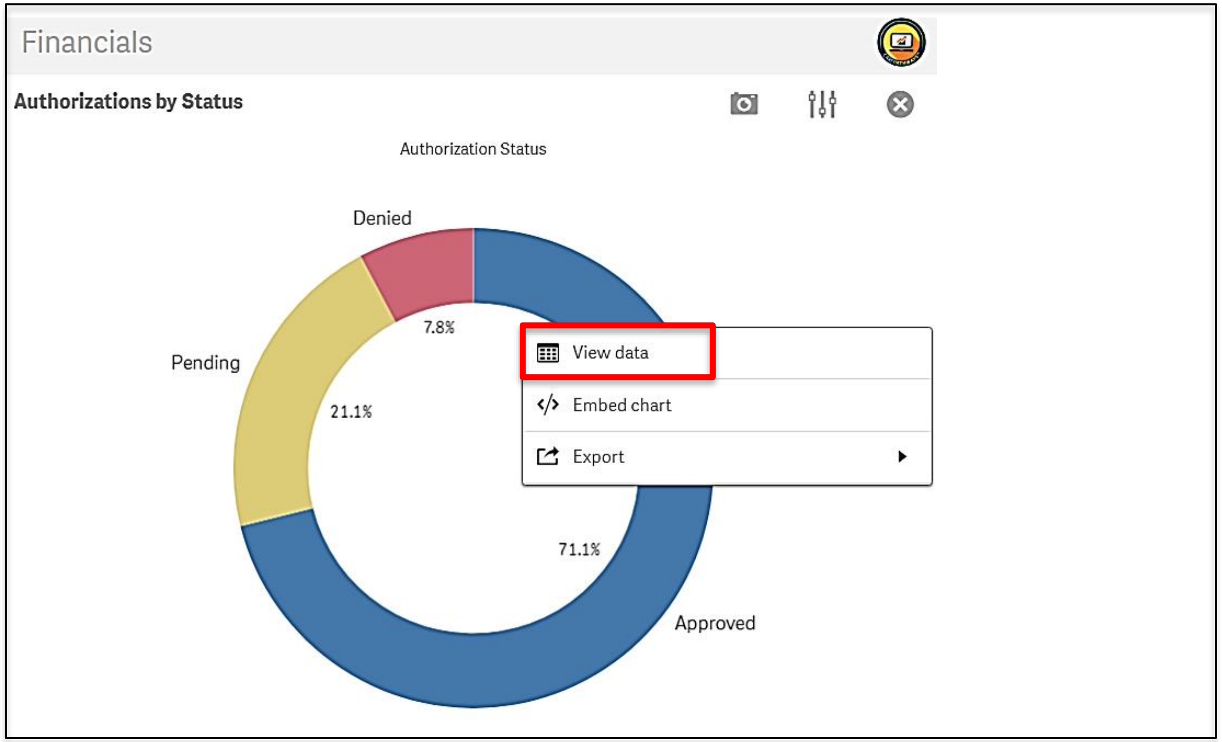


Small triangles next to an axis label indicate there are alternative views.

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



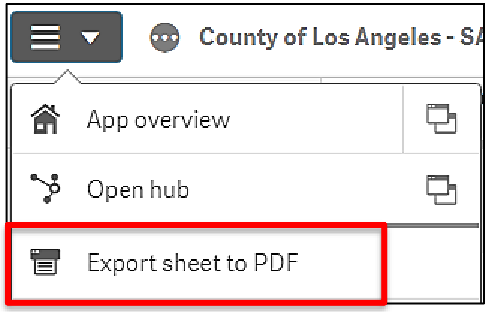
View Data-option

Financials

Authorizations by Status

Authorization Status	Authorization Count
Approved	64
Pending	19
Denied	7

Exporting

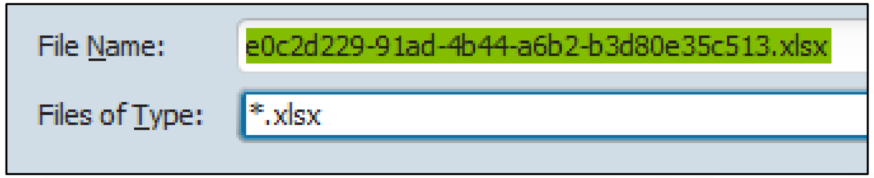


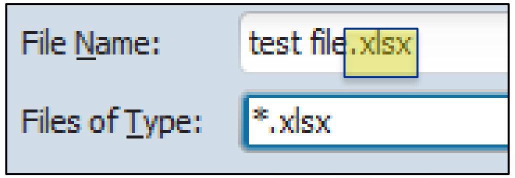
Exporting a whole sheet to PDF will only display what you see on your screen. If scrolling is needed to see data, it will not be captured in this export.

Within an object you can also export information.

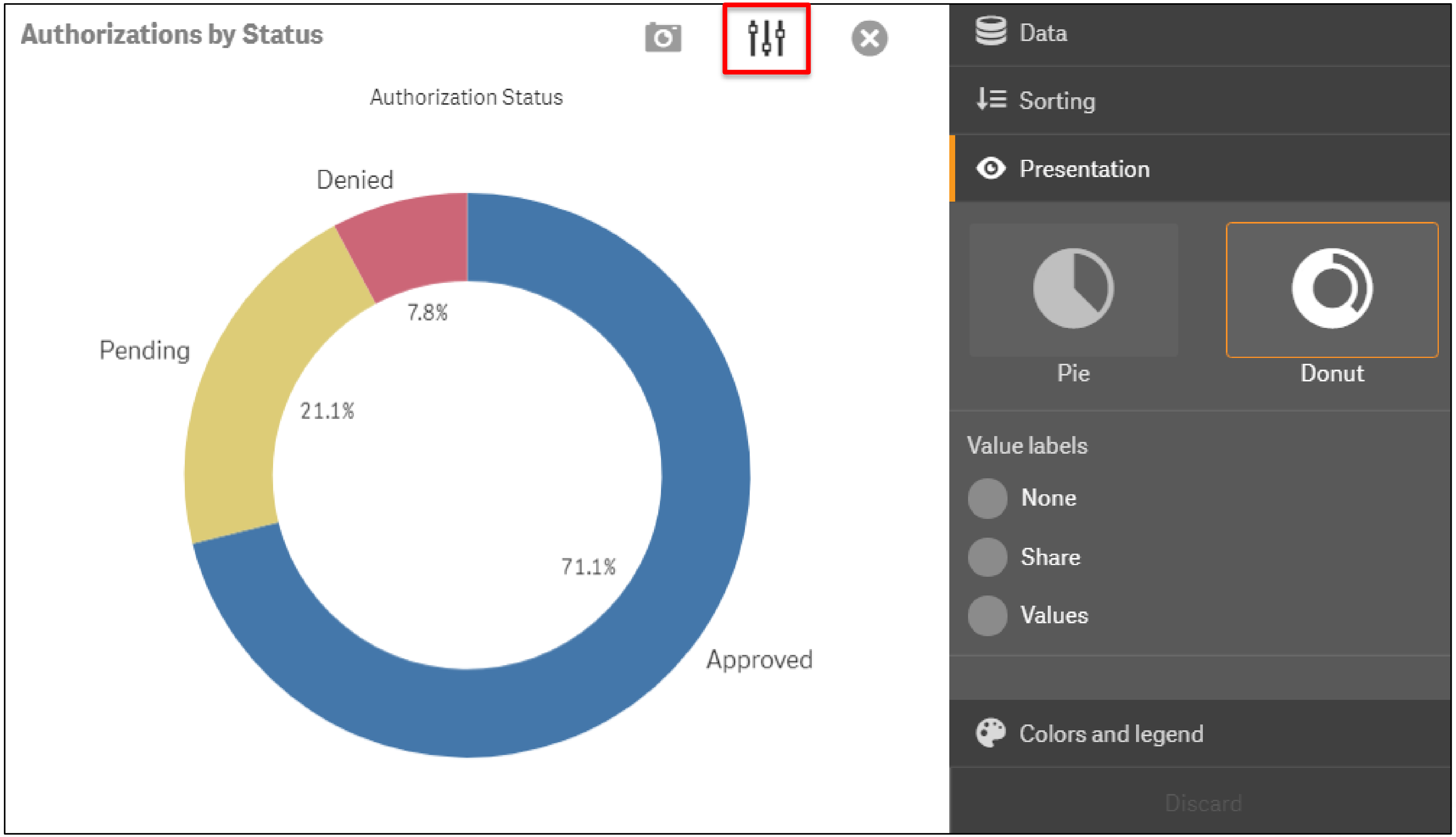
- For better resolution use export as an image customize the pixels.
- To include information in reports consider exporting to a PDF.
- For analysis, tracking, internal record keeping export data to excel.

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.





Object Exploration



Year Selections

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)

Fiscal Year

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

FY 21/22 is FY2022 in KPI

FY 22/23 is FY2023 in KPI

Fiscal Half for FY2023

H1= July 2022-December 2022

H2= January 2023- June 2023

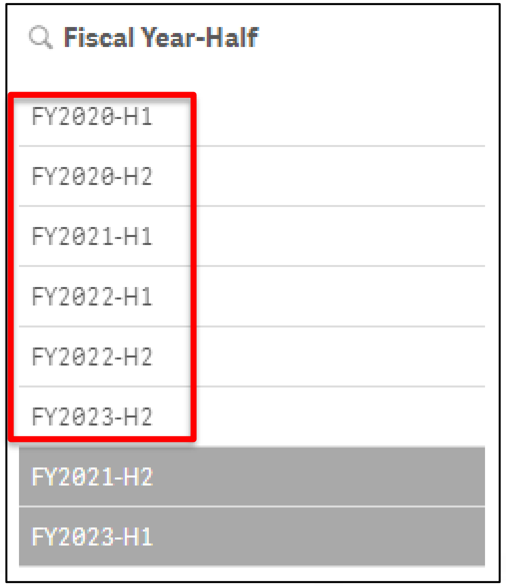
Fiscal Month Number

FY2023-1 equals July 2022

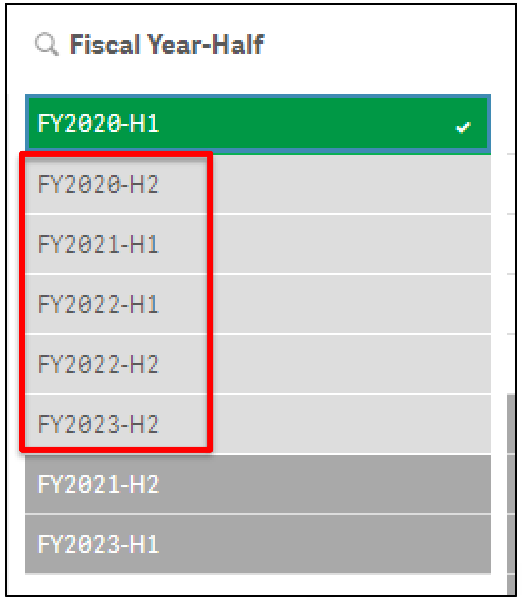
FY2023-12 equal June 2023

Selections

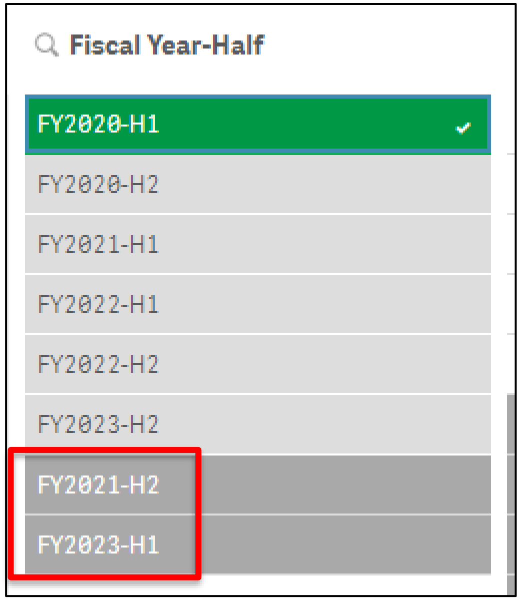
White
Item contains available data based on selected filters



Light Gray
Once a selection is made, it shows what additional values contain data that would not override the existing selection.



Dark Gray
Once a selection is made, it shows values that are outside of all the selected filters. If selected, this would override existing filters.



MSO KPI Dashboards 2.0

MSO Public Sheets

- Client Demographics:
  - Aggregate information based on data entered on Provider Admission, which does not change.
  - This is a limitation for MSO, there is no accurate measure of admission to a site or length of stay SAPC protocol is to not have Episodes closed at discharge.
- Client Details:
  - Client specific demographic details
  - Limited to client with financial transactions.

MSO Public Sheets

- Procedures:
  - General overview of how many procedures and patient's have been billed against, based on the type of procedure, authorization type, or performing provider.
- Operational Details:
  - **Claim Detail:** Mainly indicates when and how much a type of claim was billed (Professional vs Institutional).
  - **Authorization Detail:** The procedures that have been billed against a specific authorization. The Auth ID is an auto generated number not visible to providers in Sage and is different than the authorization number.
  - **Procedures Details:** Non-patient specific billed procedures, including the charge amount, claim status and comparison to the Total Fee Table Amount
  - **EOB Detail:** Only Original EOBs are included. This provides the amount associated with the EOB and notes if there is an associated check number(s).

Payment Reconciliation (Updated Nov 2022)

- Purpose: Overall view of financial transactions between providers and SAPC.
  - Approvals, Denials, Takebacks, paid/not yet paid.
  - It contains details of services which can be used for drill down/sorting selections.
- Updates:
  - Additional filters were added for easier drill down
  - New columns were added to the Procedure Overview that will aid in troubleshooting denials or discrepancies with claim amounts.
  - EOB date added to the Original EOB Summary to aid in troubleshooting.
- Use Cases: This can be used for reconciliation, trend identification, review of transaction history.

Claim Denial View (Updated Nov 2022)

- Purpose: Provide visibility on local/Level 1 denials and the reason for the denial.
- Updates:
  - New filter options
  - Additional graphic of denial count by site location
  - Additional columns to the Procedure Overview table to include charged amount and EOB information
- Use Cases: Identify local denial reason then reference the Sage Claim Denial reason and Resolution Crosswalk for a resolution to the denial(s). Correct the claims and resubmit/replace.

State Denial Sheet

- Purpose: Provide visibility on State/Level 2 denials and the reason for the denial. This only shows State Denial that have been retro adjudicated from providers.
  - Retro Adjudications generate a specific "Retro EOBs."
  - Retro EOB date is the same as the takeback date.

- Use Cases: Identify State denial reason then reference the Sage Claim Denial reason and Resolution Crosswalk for a resolution to the denial(s). Correct the claims and resubmit/replace.
  - The Procedure Overview maintains an ongoing list of State Denials regardless of whether they have been corrected and resubmitted/replaced.
  - A recommended way to work denials is by the takeback date.

Procedure Auth Review

- Purpose: Provides visibility on whether KPI registers services having been billed against an authorization. MSO KPI verifies transactions against the authorization. If there are discrepancies KPI will suppress the data as it is flagged as a potential HIPAA/42 CFR Part 2 violation.
- Use Cases:
  - Troubleshooting data discrepancies
  - Overall trend analysis to see whether services are being billed, particularly for P-Auths.

MSO: Financial Analysis by Year (New)

- Purpose: to provide detailed information about financial trends and overall financial information using several financial measures that can be filtered by level of care, contract number and various dates.
- Use Cases:
  - Fiscal year trend analysis of payments, denials, takebacks by LOC.
  - Monthly trend analysis of payments, denials, takebacks by LOC

PM KPI Dashboards 2.0

Client Details

This is based on the patients who have been admitted to an episode.

- Client Detail- Basic demographic information: Gender, age, DOB, home phone.
- Client Demographic Detail- Race, ethnicity, education, employment, occupation
- Client Diagnosis Detail- Most recent diagnoses submitted.
- Client Medication Detail- Blank- it will not populate
- Vital Signs Detail- Blank – it will not populate

Financial Eligibility for Providers (Newish)

- Purpose: Provides a count patients associated with each guarantor.
- Use Cases: Specifically, this sheet was developed to provide visibility into patients listed as Applying for Medi-Cal for easier tracking and determine if the Applying for Medi-Cal guarantor is used appropriately.

Requesting KPI Access

KPI Account Requirements

- Contract Provider Practitioners must have a Sage Account to request a KPI Account.
- Under the Sage User Enrollment Page complete the User Creation form and select "KPI Access" under SAGE User Request Type and return to sageforms@ph.lacounty.gov

Step 3

Sage Registration

- Complete the Sage ProviderConnect User Creation form to create your Sage Account and submit to sageforms@ph.lacounty.gov.

Click on FORM to download the Sage ProviderConnect User Creation form.

Field Instructions	Input Values This Column
SAGE User Request Type	KPI Access
Agency for user to be setup under	Additional Agency Creation
Does user belong to an Agency Already	Modification
This is the user's C# (NO HYPHEN)	Termination KPI Access

KPI Account Approval

- Once Contracts receives the User Creation Form, they will contact the Agency Liaison to verify the Agency is in agreement to allow access.
- KPI is not appropriate for all staff.
- KPI exposes PHI and financial information for an entire agency not just a particular site, so Agencies should be mindful to whom they give that level access.
- KPI is intended as an analytics tool, therefore users should be able to view/manipulate data to extrapolate key findings.

Resources

KPI Resources

- **Job Aids**- http://publichealth.lacounty.gov/sapc/providers/sage/kpi.htm
- **Recordings and KPI Guide**- Sage > Main Menu > Documentation > Help > Sage Training and Other Materials
- Denial Crosswalk
- Guide to Claim Denial Resolution and Crosswalk
- Quick Guide to Identifying Denials