



Maximize Organizational Effectiveness with Analytics and Reporting

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Agenda

1

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8

This is a sample text

- Improve operational efficiency
 - Reduce waste
- Reduce cost of care
 - Maximize services with the right provider and the right clinical interventions
- Improve clinical outcomes
 - Deliver the right services at the right level of care with the most impact
- Evaluate and improve clinician performance and effectiveness

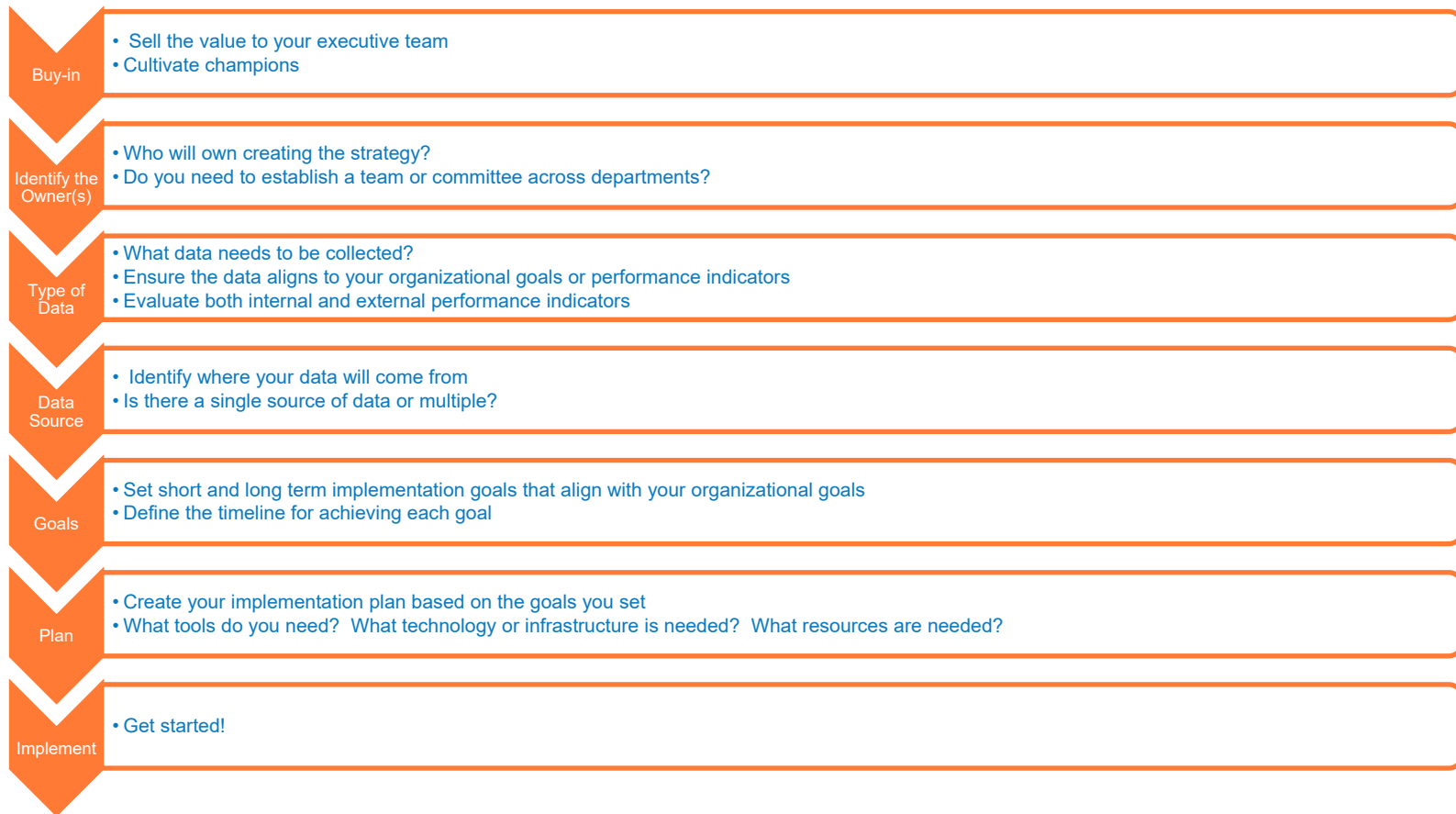
What is a Data Strategy?

- Comprehensive plan that outlines the tools, technology and processes that you will implement to collect, manage, analyze and act upon data across your organization to achieve strategic goals

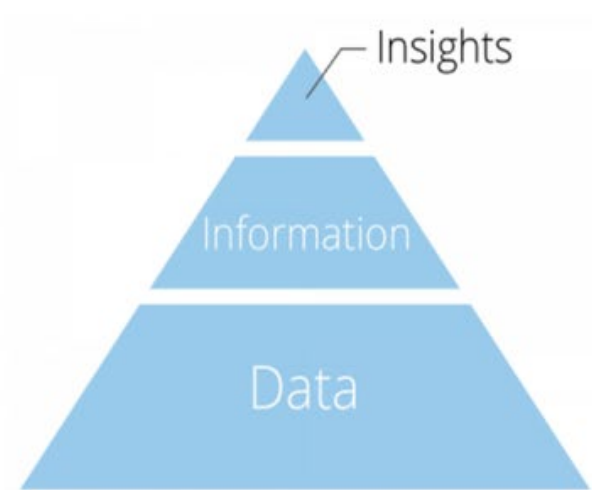
Why is the important?

- Large amount of data is being collected every day but only a small fraction is being leveraged for decision making or performance improvements
- A data strategy will help your organization become more focused and deliberate about what data is collected, how it is analyzed and how it is consumed by your staff

Key Principles in Establishing a Data Strategy

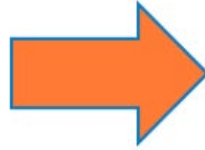


- **Data** is the raw and unprocessed facts that are usually in the form of numbers and text. Data can be quantitative (measured) or qualitative (observed). Data primarily exists in computer-friendly formats and mostly lives in databases and spreadsheets.
 - **Example:** 3,000 individual sessions were provided in YTD
- **Information** is prepared data that has been processed, aggregated and organized into a more human-friendly format that provides more context. Information is often delivered in the form of data visualizations, reports and dashboards.
 - **Example:** Those sessions broken down by program and provider
- **Insights** are generated by *analyzing* information and drawing conclusions. Both data and information set the stage for the discovery of insights that can then influence decisions and drive change.
 - **Example:** Clients with 5 – 10 sessions are more likely to have better outcomes



Traditional Reporting

- Structured data summaries through defined reports or ad hoc requests
- Controlled by IT staff
- Governance of data
- Single version of truth
- Raises questions
- Distills information
- Alerts organizations to exceptions in the data



Analytics

- Free exploration of the data to extract meaningful insights
- Controlled by the Business User
- End user flexibility
- Timely access to data insights
- Attempts to answer “why” and “so what”
- Provides deeper insights into business
- Offers actionable data



Options Counseling Case Study

qualif*acts* + CREDIBLE





- About 30 Years old
 - Medicare / Medicaid 40%
 - Child Welfare 50%
 - Commercial Insurance 10%

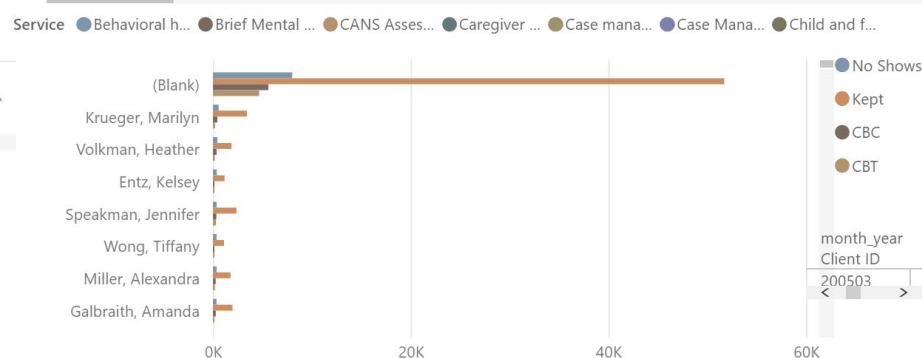
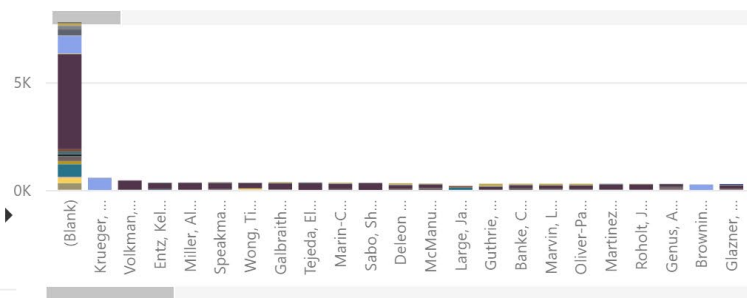
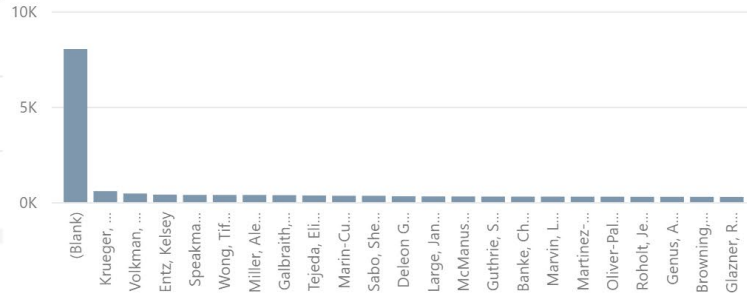
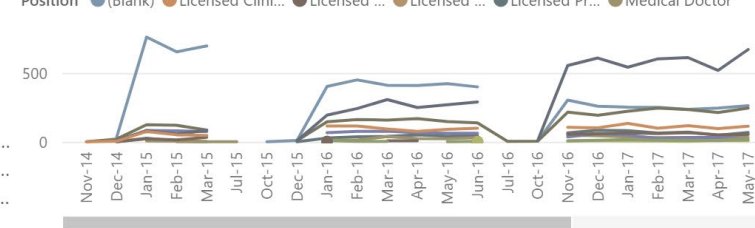
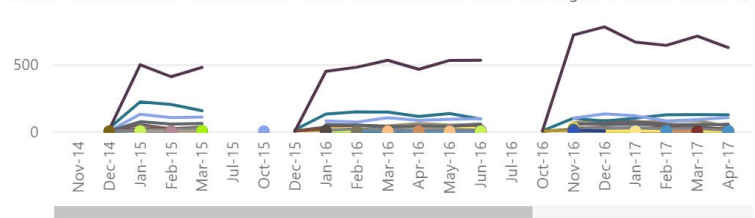
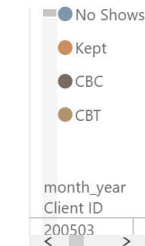


- About 30 Years old
 - Medicare / Medicaid 40%
 - Child Welfare 50%
 - Commercial Insurance 10%
- 13 +/- offices in 11 Counties
- About 250 Staff

History of Analytics for Options

- Implemented with commercial 3rd party
 - ❑ Very expensive \$\$\$\$

Kept %	No Show %	CBC %	CBT %
75.6 %	11.1 %	7.33 %	6.0 %



Engagement

Engagement

● Active Client Count ● Persons Served

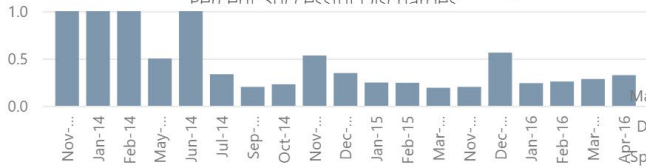


Persons Served Proportions

● Admits ● Discharges

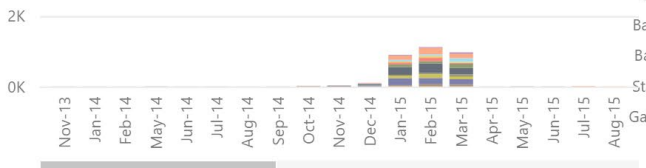


Percent Successful Discharges

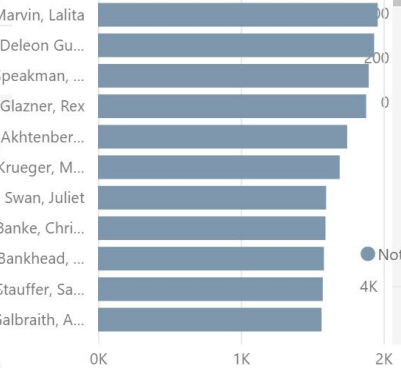


Discharges Rv Reason

Discharge Reason ● (Blank) ● Client deceased ● Client incarcerated... ● Client move...



Staff - Billable Hours

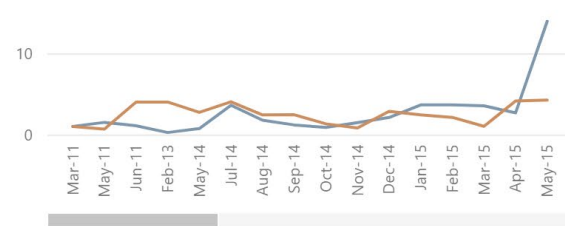


Client Units Report

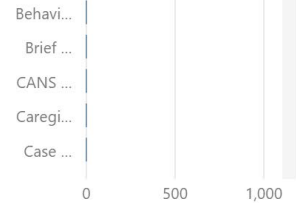
Client ID	Mar-11	May-11	Ju...
200499			
200502			
200503			
200507			
200509			
200511			

Service Intensity

● Service Hours Per Client ● Units Per Client

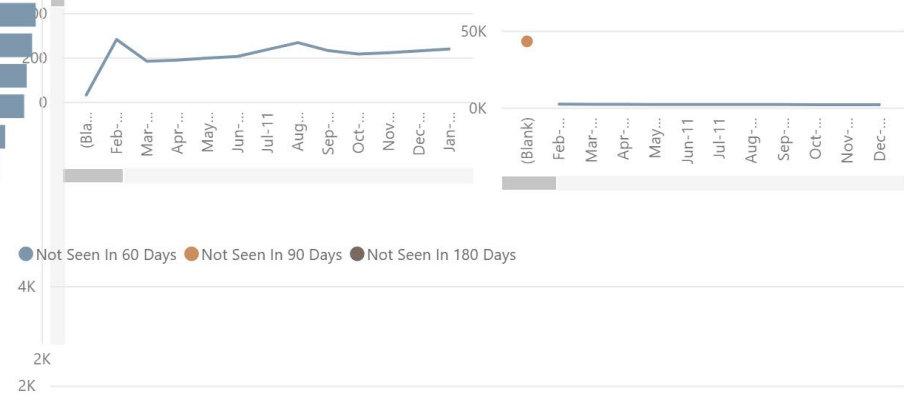


Units Per Client Rv Activity



Avg Days Since Seen

● For Discharged ● Length of Stay ● For Not Discharged



● Not Seen In 60 Days ● Not Seen In 90 Days ● Not Seen In 180 Days



Revenue Generation

Expected Fee

Expected Fee Proportions

Services

Billable Hours Proportions

... (Blank) ... Behavioral he...

Service Encounters Billable Hours

... (Blank) ...

Expected Fee Reports

Program	Jan-15
	\$160.00
Payer Plan	

Active Client Count

(Blank) ... Feb ... Mar ... Apr ... May ... Jun ... Jul ... Aug ... Sep ... Oct ... Nov ...

10K

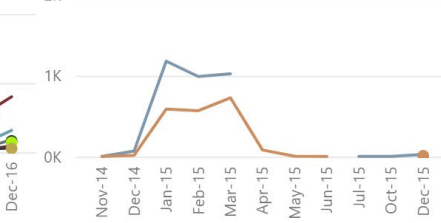
0K

Per Staff Ratios

Service Behavioral ... Brief Ment... CANS Asses...

No Shows Cancellations

Scheduled Events



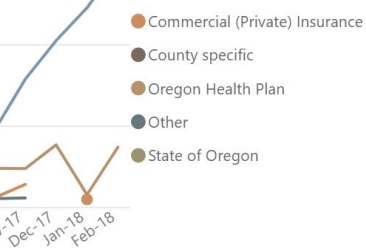
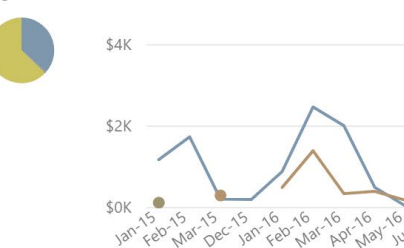
Consumer Populations

Expected Fee By Payer

... (Blank) ... Female ... Alaska Native ... CPMS- Hisp... ... English

Payer Plan

(Blank)
Commercial (Private) Insurance
County specific
Oregon Health Plan
Other
State of Oregon



Staff Trends

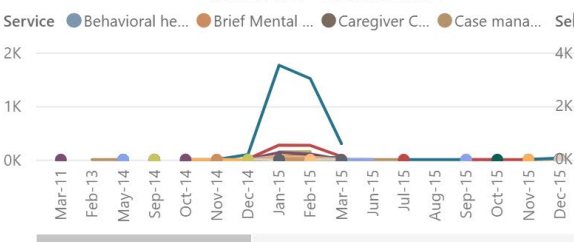
Caseload and Persons Served



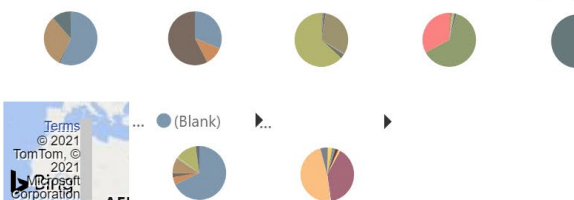
Billable Hours and NonBillable Hours



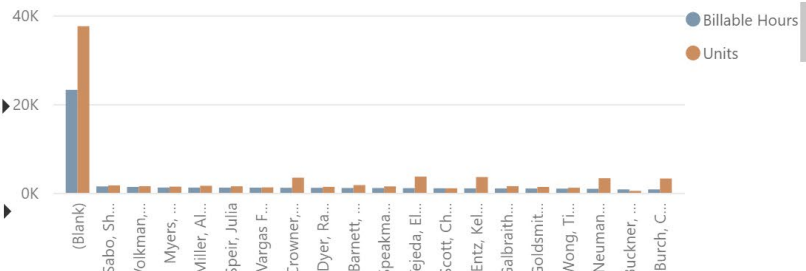
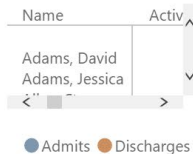
Service Mix - Billable Hours



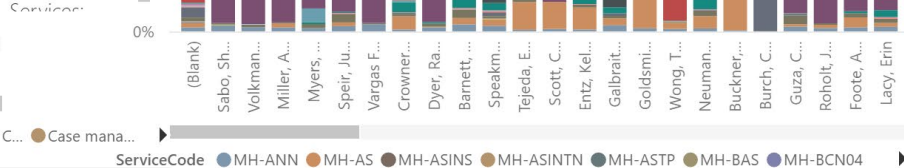
Service Mix - Units



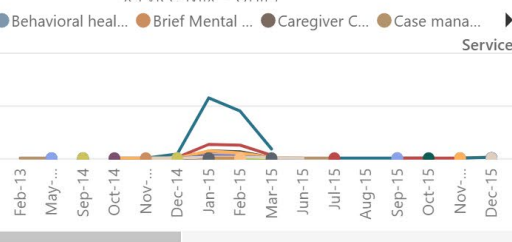
Popout for Staff Scorecard



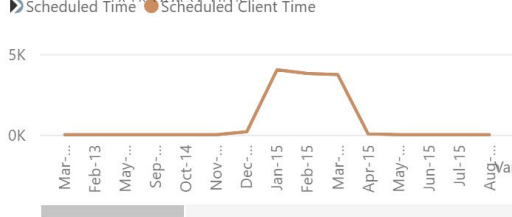
Non Billable Services



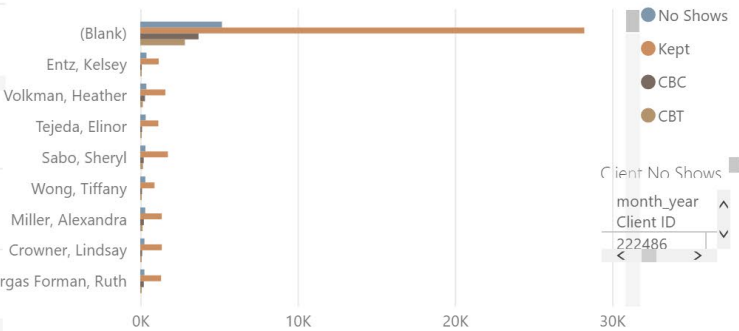
Service Mix - Units



Scheduled Time



Kept %	No Show %	CBC %	CBT %
70.2 %	13.6 %	9.32 %	6.8 %



History of Analytics for Options

- Implemented with commercial 3rd party
 - ❑ Very expensive \$\$\$\$
- Information overload / Not specifically relevant
- Did not know how to act on it within our mission
- Desire to continue with what they knew
 - ❑ Excel reports for very specific info

Client ID												
A	B	C	D	E	F	G	H	I	J	K	L	
Client ID	Client #	Client Name	Payer	Level	Auth Begoin Date.	Auth End Date	Staff Name					
255434	WN801L8A		HealthShare Oregon	B	03-20-21	09-16-21	Amanda Genus					
255436	WN801L8B		HealthShare Oregon	C	03-26-21	09-22-21	Amanda Genus					
255667	EP701F9R		HealthShare Oregon	C	04-03-21	09-30-21	Amanda Genus					
260861	OR201F8S		HealthShare Oregon	B	02-16-21	08-15-21	Amanda Genus					
263004	NP501L8U		HealthShare Oregon	C	03-22-21	09-18-21	Amanda Genus					
266674	MS601M7O		HealthShare Oregon	C	05-01-21	10-28-21	Amanda Genus					
268486	KX901J1P		HealthShare Oregon	As+3	03-14-21	09-10-21	Amanda Genus					
268512	XS901J7D		HealthShare Oregon	C	03-21-21	09-17-21	Amanda Genus					
268575	NE300U5F		HealthShare Oregon	C	03-15-21	09-11-21	Amanda Genus					
240325	OC401K9O		HealthShare Oregon	B	02-15-21	08-14-21	Sally Gradin					
265775	YP19603B		HealthShare Oregon		03-20-21	09-16-21	Sally Gradin					
214137	IU301A7T		HealthShare Oregon	C	02-13-21	08-12-21	Portland File Room					
219650	FP300N5A		HealthShare Oregon		05-01-21	10-28-21	Portland File Room					
233576	CG200T4I		HealthShare Oregon	C	03-16-21	09-12-21	Portland File Room					
234618	SB501A6A		HealthShare Oregon	B	03-29-21	09-25-21	Portland File Room					
239993	NM400R4V		HealthShare Oregon	B	03-09-21	09-05-21	Portland File Room					
244653	FS100N3K		HealthShare Oregon		04-23-21	10-20-21	Portland File Room					
247389	KJ301C6B		HealthShare Oregon	B	04-01-21	09-28-21	Portland File Room					

C2

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Service Date	Client #	Client	Staff	Activity Code	Status	Staff Time	Client Time	Standard Fee	Program Code	Org Code		
2	01-Aug-21	273152		Miller, Lisa (269903)	DHS InSvc	DNS	4:00 PM - 5:00 PM	4:00 PM - 5:00 PM	\$0.00	ISRS	Eug		
3	02-Aug-21	268804		Dieter, Danielle	MH-PCITF	CBC	4:00 PM - 5:00 PM	4:00 PM - 5:00 PM	\$250.00	OCSCOP	MARCO		
4	02-Aug-21	269118		Diaz, Rosa (224580)	DHS CSVS	DNS	8:30 AM - 9:30 AM	8:30 AM - 9:30 AM	\$0.00	FSC	MARCO		
5	02-Aug-21	269118		Mansur, Ricardo	MH-INDINS	CBT	1:00 PM - 2:00 PM	1:00 PM - 2:00 PM	\$0.00	OCSAOP	SOSALEM		
6	02-Aug-21	272882		Mansur, Ricardo	MH-INDINS	CBT	3:00 PM - 4:00 PM	3:00 PM - 4:00 PM	\$0.00	OCSAOP	SOSALEM		
7	02-Aug-21	269180		Roberts, Wendi Lou	MH-GRPTX	DNS	5:30 PM - 7:30 PM	5:30 PM - 7:30 PM	\$80.00	OCSAOP	Sprfld		
8	02-Aug-21	272408		Mansur, Ricardo	MH-INDINS	CBT	10:00 AM - 11:00	10:00 AM - 11:00 AM	\$0.00	OCSAOP	SOSALEM		
9	02-Aug-21	239628		Scott, Christopher	MH-INDINS	CBC	5:00 PM - 6:00 PM	5:00 PM - 6:00 PM	\$0.00	OCSAOP	Sprfld		
10	02-Aug-21	254700		Wilson, Laura (245139)	MH-INDINS	CBT	8:00 AM - 9:00 AM	8:00 AM - 9:00 AM	\$0.00	OCSAOP	Rural		
11	02-Aug-21	249432		Rivas, Dina (259850)	MH-INDINS	CBC	11:00 AM - 12:00	11:00 AM - 12:00 PM	\$0.00	OCSCOP	WOOD		
12	02-Aug-21	272000		Smith, Marial (270350)	MH-INDINS	DNS	11:00 AM - 12:00	11:00 AM - 12:00 PM	\$0.00	OCSAOP	Eug		
13	02-Aug-21	268588		Dooley, Thomas	MH-ANN	DNS	5:00 PM - 6:00 PM	5:00 PM - 6:00 PM	\$240.00	OCSAOP	SOSALEM		
14	02-Aug-21	218799		Mansur, Ricardo	MH-INDINS	CBT	9:00 AM - 10:00 AM	9:00 AM - 10:00 AM	\$0.00	OCSAOP	SOSALEM		
15	02-Aug-21	230817		Hill, Caitlynn (244407)	MH-INDINS	DNS	4:00 PM - 5:00 PM	4:00 PM - 5:00 PM	\$0.00	OCSCOP	Multnomah		
16	02-Aug-21	239335		Reyes Alcantar, Blanca	DHS CSVS	CBC	3:30 PM - 5:00 PM	3:30 PM - 5:00 PM	\$0.00	ISRS	MARCO		
17	02-Aug-21	250749		Barnett, David (238998)	MH-SP-WC	CBT	4:00 PM - 5:00 PM	4:00 PM - 5:00 PM	\$205.00	OCSCOP	Florence		
18	02-Aug-21	230519		Hill, Caitlynn (244407)	MH-INDINS	DNS	2:00 PM - 3:00 PM	2:00 PM - 3:00 PM	\$0.00	OCSCOP	Multnomah		
19	02-Aug-21	266257		Rivas, Dina (259850)	MH-INDINS	CBC	3:00 PM - 4:00 PM	3:00 PM - 4:00 PM	\$0.00	OCSAOP	WOOD		
20	02-Aug-21	264690		Deleon Guerrero,	MH-INDINS	CBC	2:00 PM - 3:00 PM	2:00 PM - 3:00 PM	\$0.00	OCSAOP	MARCO		
21	02-Aug-21	272643		Pickup-Cook, Faith	KEEPGRP	DNS	2:00 PM - 3:30 PM	2:00 PM - 3:30 PM	\$0.00	KEEP	Multnomah		
22	02-Aug-21	268689		Wurster, Melissa	MH-FTWC	CBC	4:00 PM - 5:00 PM	4:00 PM - 5:00 PM	\$0.00	YFHS	MARCO		
23	02-Aug-21	268689		Wurster, Melissa	MH-INDINS	DNS	3:00 PM - 4:00 PM	3:00 PM - 4:00 PM	\$0.00	YFHS	MARCO		
24	02-Aug-21	272717		Mansur, Ricardo	MH-INDINS	CBT	5:00 PM - 6:00 PM	5:00 PM - 6:00 PM	\$0.00	OCSAOP	SOSALEM		
25	02-Aug-21	270589		Aaron, Martha (251985)	MH-ASINS	CBC	1:00 PM - 2:30 PM	1:00 PM - 2:30 PM	\$500.00	OCSCOP	WOOD		
26	02-Aug-21	267388		Mason, Sir Aaron	MH-INDINS	DNS	10:00 AM - 11:00	10:00 AM - 11:00 AM	\$0.00	OCSAOP	Eug		
27	02-Aug-21	201594		Wilson, Laura (245139)	MH-INDINS	CBT	10:00 AM - 11:00	10:00 AM - 11:00 AM	\$0.00	OCSAOP	Eug		

Clipboard		Font	Alignment	Number	Styles				
A99									
	A	B	C	D	E	F	G	H	I
81	Staff Name								
82	Tia Miller								
83	Client Name	Program				points		Points for Program	
84		Family Support and Connections (FSC)			X	6.7	=	6.67	
85		Family Support and Connections (FSC)			X	6.7	=	6.67	
86		Family Support and Connections (FSC)			X	6.7	=	6.67	
87		Family Support and Connections (FSC)			X	6.7	=	6.67	
88		Family Support and Connections (FSC)			X	6.7	=	6.67	
89		Family Support and Connections (FSC)			X	6.7	=	6.67	
90		Health Navigator (HN)			X	1	=	1	
91		Family Support and Connections (FSC)			X	6.7	=	6.67	
92		Family Support and Connections (FSC)			X	6.7	=	6.67	
93	Family Support and Connections (FSC)			X	6.7	=	6.67		
94	Family Support and Connections (FSC)			X	6.7	=	6.67		
95								Total Points	67.7
96	Staff Name								
97	Erin Davis								
98	Client Name	Program				points		Points for Program	
99		In Home Safety and Reunification Services (ISRS)			X	13	=	12.5	
100								Total Points	12.5

History of Analytics for Options

- Implemented with commercial 3rd party
 - ☐ Very expensive \$\$\$\$
- Information overload / Not specifically relevant
- Did not know how to act on it within our mission
- Desire to continue with what they knew
 - ☐ Excel reports for very specific info
- Bottom line
 - ☐ adoption failed because it was too much, too fast, too generic.



Restart

- Begin with some of the existing Excel reports
 - ❑ Convert them to Power BI.

Staff Name > Org > Program > Client_id > Relation
Begin > Relation End

Staff Name	Active Clients
<input type="checkbox"/> Virginia Dimitre	64
<input type="checkbox"/> Cassidy Smith	56
<input type="checkbox"/> Multnomah	35
<input checked="" type="checkbox"/> MH - Child Outpatient	32
<input checked="" type="checkbox"/> MH - Adult Outpatient	3
<input type="checkbox"/> Clackamas	12
<input checked="" type="checkbox"/> MH - Child Outpatient	12
<input type="checkbox"/> Washington	9
<input checked="" type="checkbox"/> MH - Child Outpatient	6
<input checked="" type="checkbox"/> MH - Adult Outpatient	3
<input checked="" type="checkbox"/> Thomas W Dooley	54
<input checked="" type="checkbox"/> Elizabeth M Bradshaw	48
<input checked="" type="checkbox"/> Andrea L Larsen	47
<input checked="" type="checkbox"/> Elizabeth K Conkey	46
<input checked="" type="checkbox"/> Richard Ruddell	46
<input checked="" type="checkbox"/> Jason Cheung	45
<input checked="" type="checkbox"/> Caitlynn Hill	44
<input checked="" type="checkbox"/> Danielle Sanchez	43
<input type="checkbox"/> Sandra Spooner	43
Total	2715

Relationship Active

8/1/2021

8/31/2021

Client Age

0

119

Program

☐ Collaborative Home Services

☐ Enhanced Visitation

☐ Family Support and Connections

☐ Hands-On Parenting

☐ Health Navigator

☐ In Home Safety and Reunificatio...

☐ Independent Living Program

☐ Intensive In-home Family Treatm...

☐ KEEP

☐ MH - Adult Outpatient

☐ MH - Assertive Community Treat...

☐ MH - Child Outpatient

☐ MH - Commercial Insurance Only

☐ MH - Employee Assistance Progr...

Client Program Org

☐ Benton

☐ Clackamas

☐ Clatsop

☐ Columbia

☐ Douglas

☐ Eugene

☐ Florence

☐ Lane

☐ Lincoln

☐ Linn

☐ Marion

☐ McKenzie River

☐ Mid-Valley

☐ Multnomah



Restart

- Begin with some of the existing Excel reports
 - ☐ Convert them to Power BI.
- Add some filters and options
 - ☐ People can adjust as they need
 - ☐ Introduce visualizations (charts and graphs)

Select Filters

Discharge Date

4/1/2021

6/30/2021

Select Program

- ☐ Collaborative Home Services (CHS)
- ☐ In Home Safety and Reunification Services (ISRS)
- ☐ Youth Mentor (YM)

Select Organization

- ☐ Clackamas
- ☐ Clatsop
- ☐ Columbia
- ☐ Douglas
- ☐ Eugene

Results

Outcome Value	Number of clients	% of closed cases
<input type="checkbox"/> 3	4	39.81%
<input type="checkbox"/> 1	3	28.85%
<input type="checkbox"/> 2	2	20.87%
<input type="checkbox"/> 6	1	10.48%
Total	10	100.00%

Select Filters

Discharge Date

4/1/2021

6/30/2021

Select Program

- ☐ Collaborative Home Services (CHS)
- ☐ In Home Safety and Reunification Services (ISRS)
- ☐ Youth Mentor (YM)

Select Organization

- ☐ Clackamas
- ☐ Clatsop
- ☐ Columbia
- ☐ Douglas
- ☐ Eugene

Results

Outcome Value	Number of clients	% of closed cases
<input checked="" type="checkbox"/> 3	4	39.81%
<input checked="" type="checkbox"/> 1	3	28.85%
<input checked="" type="checkbox"/> In Home Safety and Reunification Services (ISRS)	3	28.85%
<input checked="" type="checkbox"/> Polk	3	28.85%
1. Achieved - Child remains in-home with parent	2	18.78%
1. Achieved - Child returned to parent's care	1	10.07%
<input checked="" type="checkbox"/> 2	2	20.87%
<input checked="" type="checkbox"/> Collaborative Home Services (CHS)	1	10.42%
<input checked="" type="checkbox"/> Polk	1	10.42%
2. Achieved most identified outcomes	1	10.42%
<input checked="" type="checkbox"/> In Home Safety and Reunification Services (ISRS)	1	10.45%
<input checked="" type="checkbox"/> 6	1	10.48%
<input checked="" type="checkbox"/> Collaborative Home Services (CHS)	1	10.48%
<input checked="" type="checkbox"/> Polk	1	10.48%
Total	10	100.00%

Select Filters

Discharge Date

1/1/2021

6/30/2021

Select Program

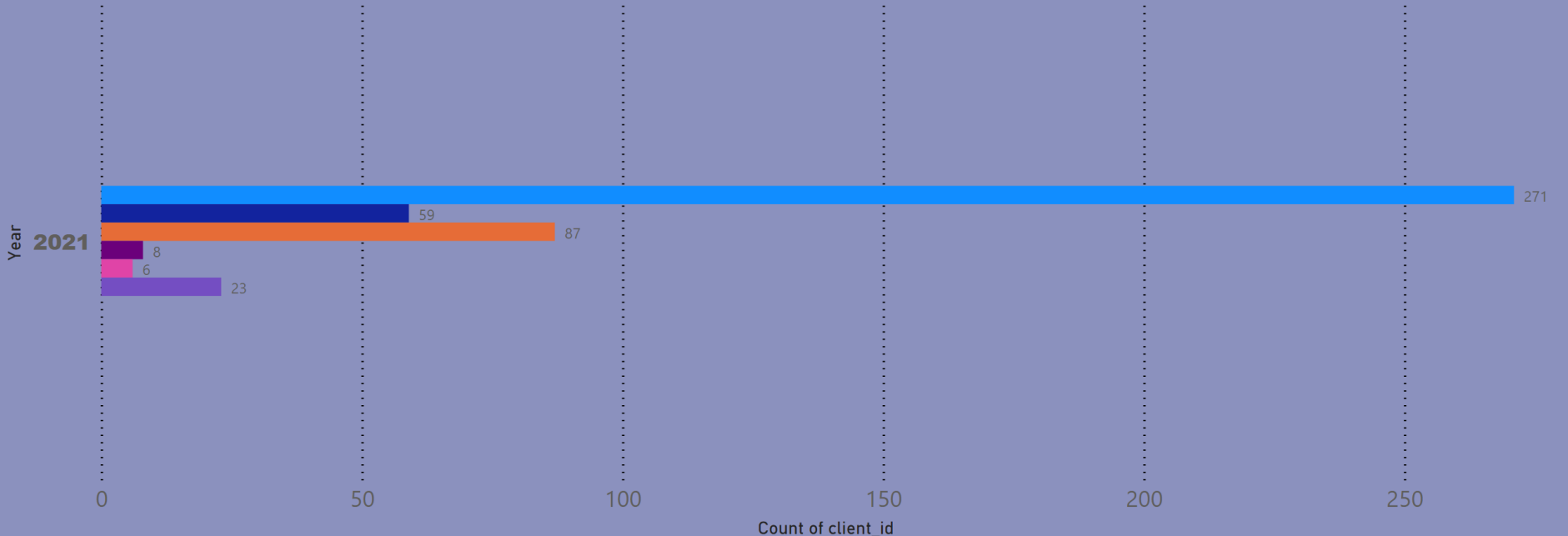
- ☐ Collaborative Home Services (CHS)
- ☐ Enhanced Visitation (EV)
- ☐ Family Support and Connections (FSC)
- ☐ Hands-On Parenting (HOP)
- ☐ Health Navigator (HN)

Select Organization

- ☐ Clackamas
- ☐ Clatsop
- ☐ Columbia
- ☐ Douglas
- ☐ Eugene

Results

Outcomes 1. Achieved 2. Partialy Achieved 3. Not Achieved 4. Made Some Progress Towards Goals 5. Did not Make Progress Toward... 6. Canceled Due to Lac...



Select Filters

Discharge Date

1/1/2021

6/30/2021

Select Program

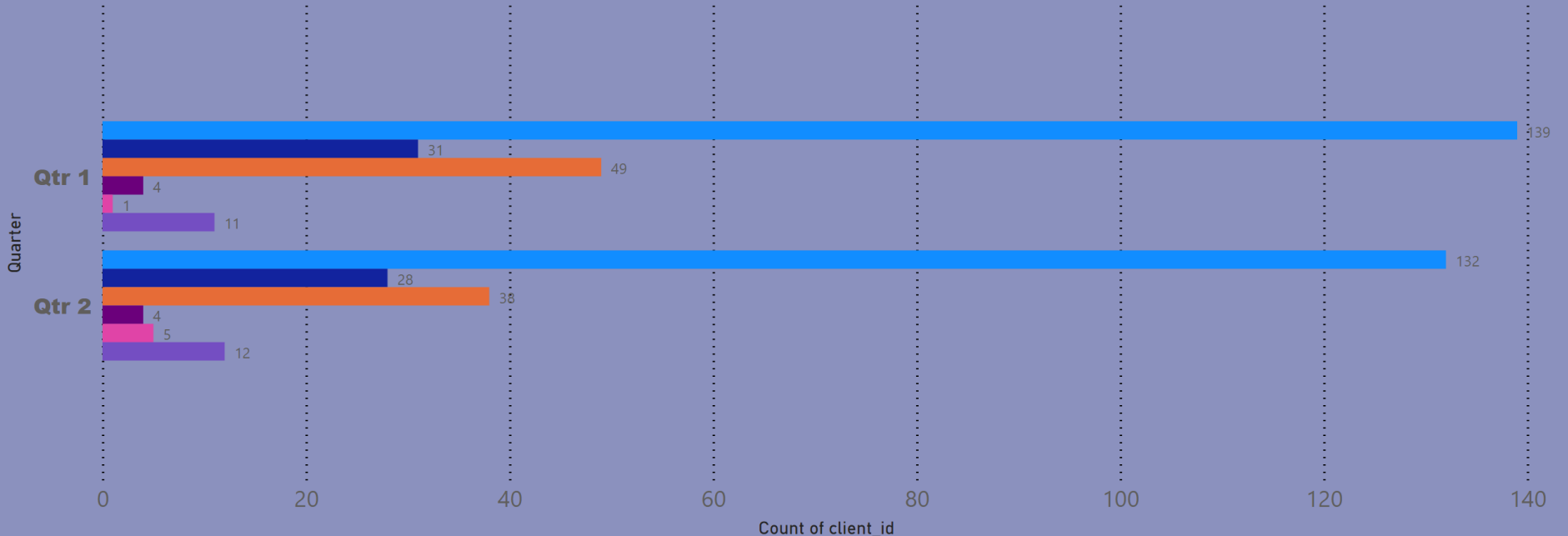
- ☐ Collaborative Home Services (CHS)
- ☐ Enhanced Visitation (EV)
- ☐ Family Support and Connections (FSC)
- ☐ Hands-On Parenting (HOP)
- ☐ Health Navigator (HN)

Select Organization

- ☐ Clackamas
- ☐ Clatsop
- ☐ Columbia
- ☐ Douglas
- ☐ Eugene

Results

Outcomes ● 1. Achieved ● 2. Partialy Achieved ● 3. Not Achieved ● 4. Made Some Progress Towards Goals ● 5. Did not Make Progress Toward... ● 6. Canceled Due to Lac...



Select Filters

Discharge Date

1/1/2021

6/30/2021

Select Program

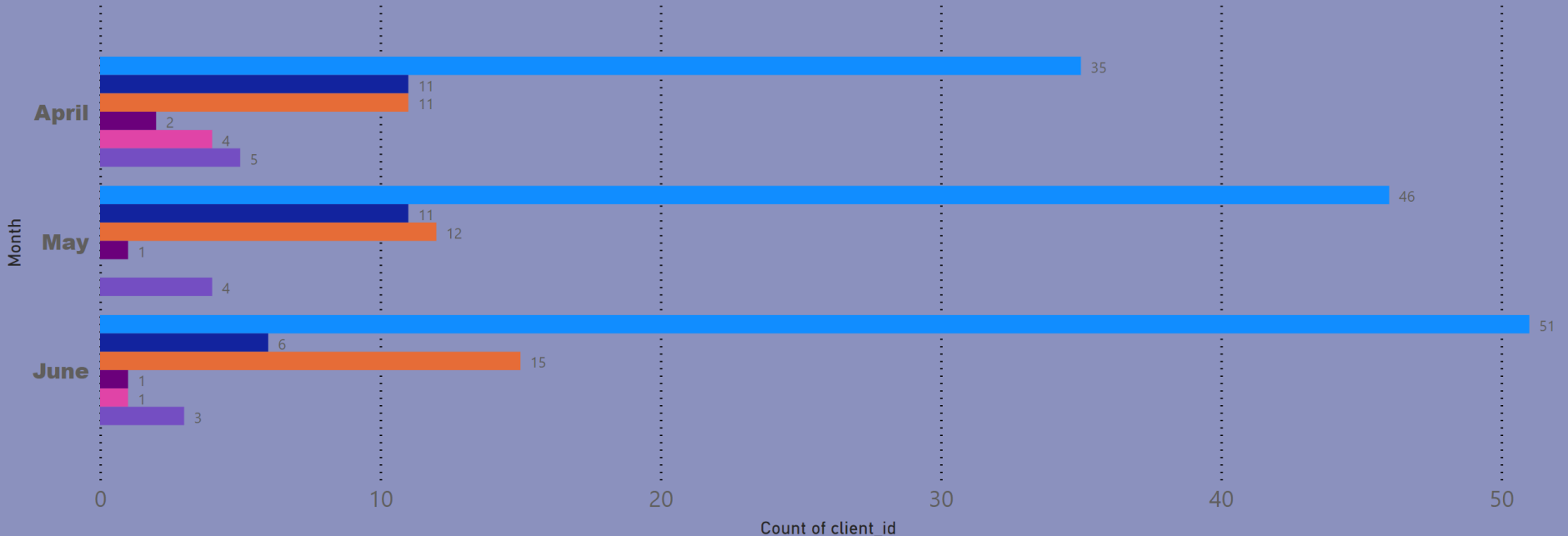
- ☐ Collaborative Home Services (CHS)
- ☐ Enhanced Visitation (EV)
- ☐ Family Support and Connections (FSC)
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1/1/2021

6/30/2021

Select Program

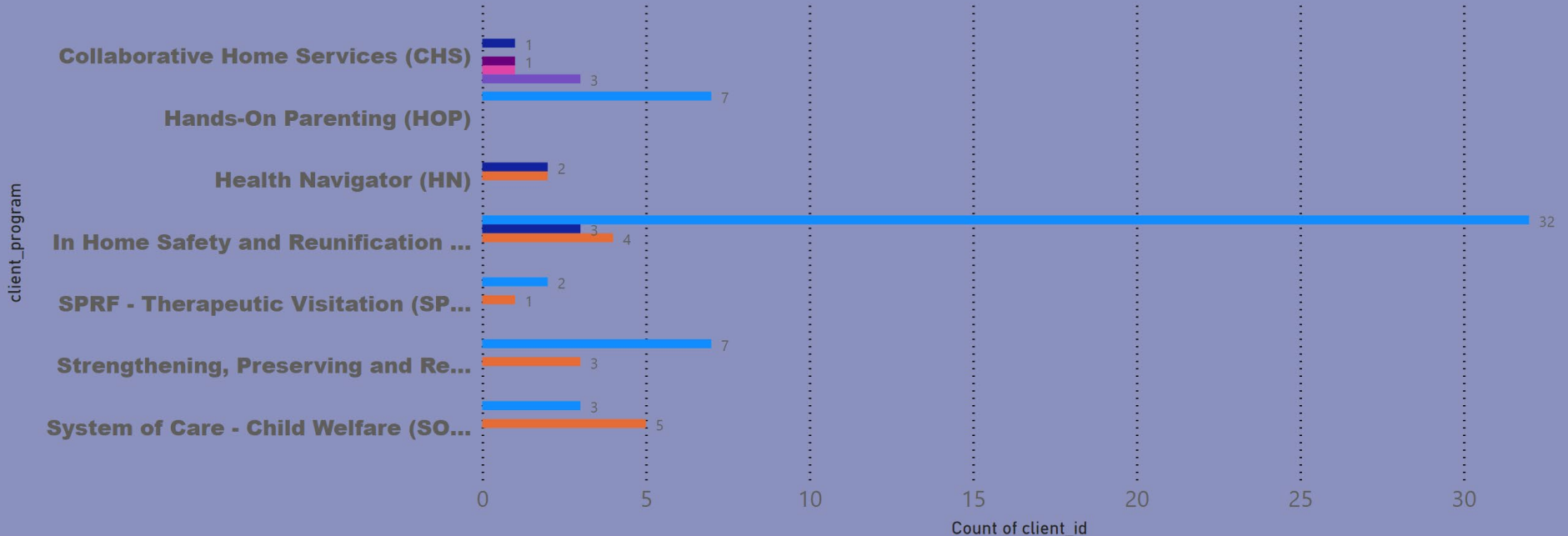
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Restart

- Begin with some of the existing Excel reports
 - ☐ Convert them to Power BI.
- Add some filters and options
 - ☐ People can adjust as they need
 - ☐ Introduce visualizations (charts and graphs)
- Find the people who like the new report
 - ☐ Train them on some additional features

Claim Created Between

Claim Priority

5/1/2021

6/30/2021

1

2

Program

- ☐ MH - Adult Outpatient (OCAOP)
- ☐ MH - Child Outpatient (OCSCOP)
- ☐ MH - Commercial Insurance Only (OCSCIO)
- ☐ MH - Psychiatric Services (OCMM)
- ☐ MH - Youth & Family Home Services (YFHS)

Orgabnization

- ☐ Clackamas
- ☐ Eugene
- ☐ Florence
- ☐ Marion
- ☐ Multnomah
- ☐ South Salem
- ☐ Springfield
- ☐ Washington
- ☐

Payer Plan

- ☒ **Select all**
- ☐ **(Blank)**
- ☐ **Advanced Health - Coos County**
- ☐ **Aetna**
- ☐ **All Care Health Plan CCO**
- ☐ **Anthem BC/BS**
- ☐ **Atrio Health Plans**
- ☐ **BC/BS & Regence Blue Cross/Blue Shield**
- ☐ **Blue Cross Blue Shield and Regence BCBS**

Could not determine standard fee
(activity may be outside date range of
the procedure fee record).

Guarantor Address Missing or
Incomplete

No Activity Procedure crosswalk exists

No Diagnosis

No Fee Matrix Setup for Procedure,
Licensure, or Payer

Payer does not support add on
procedure

organization

paid

Balance

<input type="checkbox"/> Woodburn	0.00	48.00
<input type="checkbox"/> MH - Psychiatric Services (OCMM)	0.00	48.00
<input type="checkbox"/> Martha Aaron	0.00	48.00
<input type="checkbox"/> MODA Health	0.00	48.00
<input type="checkbox"/> 268274	0.00	48.00
<input type="checkbox"/> service Date - 5/19/2021 Activity Code - MH-RXMGT	0.00	48.00
Claim # 1270626 - Claim Created - 6/11/2021 - Claim Priority - 1 - Batch ID - 16169 - 6/18/2021	0.00	48.00
<input checked="" type="checkbox"/> South Salem	0.00	245.06
<input checked="" type="checkbox"/> Marion	0.00	596.36
Total	0.00	1,033.55

Claim Created Between

5/1/2021

6/30/2021

Claim Priority

1

2

3

4

Program

- ☐ In Home Safety and Reunification Services (ISRS)
- ☐ MH - Adult Outpatient (OCAOP)
- ☐ MH - Assertive Community Treatment (OCSACT)
- ☐ MH - Child Outpatient (OCSCOP)
- ☐ MH - Commercial Insurance Only (OCSCIO)
- ☐ MH - Employee Assistance Program (OCSEAP)
- ☐ MH - Intensive Outpatient Support and Services (OCISOS)
- ☐ MH - Psychiatric Services (OCSMM)
- ☐ MH - Youth & Family Home Services (YFHS)
- ☐ Youth & Family Home Services (YFHS)

Organization

- ☐ Clackamas
- ☐ Clatsop
- ☐ Eugene
- ☐ Florence
- ☐ Lane
- ☐ Marion
- ☐ McKenzie River
- ☐ Mid-Valley

Payer Plan

- ☒ Select all
- ☐ (Blank)
- ☒ Advanced Health - Coos County
- ☒ Aetna
- ☒ All Care Health Plan CCO
- ☒ Anthem BC/BS
- ☒ Atrio Health Plans
- ☒ BC/BS & Regence Blue Cross/Blue Shield
- ☒ Blue Cross Blue Shield and Regence BCBS

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No Diagnosis

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Payer does not support add on procedure

Standard Fee cannot be less than Contracted Rate

payer_plan_name

paid

Balance

☒ Advanced Health - Coos County

0.00

696.13

☒ Aetna

0.00

1,268.00

☒ Annamaria Mattox

0.00

397.65

☒ 241035

0.00

397.65

☒ service Date - 3/6/2021 Activity Code - MH-INDINS

0.00

106.04

☒ Claim # 1272658 - Claim Created - 6/9/2021 - Claim Priority - 1 - Batch ID - 16142 - 6/3/2021

0.00

106.04

☒ MH - Adult Outpatient (OCAOP)

0.00

106.04

South Salem

0.00

106.04

☒ service Date - 4/14/2021 Activity Code - MH-INDINS

0.00

79.53

☒ service Date - 4/24/2021 Activity Code - MH-INDINS

0.00

106.04

Total

473.54

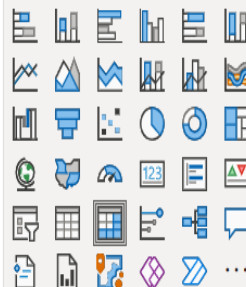
190,569.18



Visualizations



Filters



Rows

payer_plan_name



staff_name



client_id



Cons_claim_info



cons_claim_info2



item_program



organization



Columns

Add data fields here

Fields

Claim Created Between

5/1/2021

6/30/2021

Claim Priority

1

2

3

4

Program

- ☐ In Home Safety and Reunification Services (ISRS)
- ☐ MH - Adult Outpatient (OCAOP)
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- ☐ Marion
- ☐ McKenzie River
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Payer Plan

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- ☐ (Blank)
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- ☒ Aetna
- ☒ All Care Health Plan CCO
- ☒ Anthem BC/BS
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payer_plan_name

paid

Balance

<input checked="" type="checkbox"/> Advanced Health - Coos County	0.00	696.13
<input checked="" type="checkbox"/> Aetna	0.00	1,268.00
<input type="checkbox"/> Annamarie Mattox	0.00	397.65
<input type="checkbox"/> 241035	0.00	397.65
<input type="checkbox"/> service Date - 3/6/2021 Activity Code - MH-INDINS	0.00	106.04
<input type="checkbox"/> Claim # 1272658 - Claim Created - 6/9/2021 - Claim Priority - 1 - Batch ID - 16142 - 6/3/2021	0.00	106.04
<input type="checkbox"/> MH - Adult Outpatient (OCAOP)	0.00	106.04
South Salem	0.00	106.04
<input checked="" type="checkbox"/> service Date - 4/14/2021 Activity Code - MH-INDINS	0.00	79.53
Total	473.54	190,569.18

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 - ☐ People can adjust as they need
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 - ☐ Train them on some additional features
- Ask for other things they want to see.

Take away / lessons learned

- IT cannot force change
 - ❑ Even if we are asked to
- Find advocates / power users to champion with peers
- Listen to requests carefully
- Start slowly and add info as users are ready
- Determine the proper delivery format



Monarch Case Study

qualif*acts* + CREDIBLE



Credible BI: How Data Can Help Support Operations

- Prior to having access to our Credible BI system, we had various barriers to visualize data captured in our Electronic Medical record.
- We had to resort to creating and managing manual spread sheets to help keep track of assigned provider and case management patients.
- We had limited insight into our data and outcomes which limited our ability to identify gaps in operations and workflows.



Provider Caseload

Credible BI has given us the ability to visualize provider case loads broken down by acuity levels.

This allows providers and case managers to visualize their caseload. Any number that is highlighted in blue drills down into a list of the actual patient names who are associated with that provider. This allows quick access to patient records within our MAT program.

This also allows us the ability to see when we have patients who are not appropriately assigned to a provider.

From an administrative perspective, this helps to ensure that each patient is supported by the appropriate team and/or provider.

MAT Provider Caseload Report [DT2]

Number of Clients		Most Recent TCM Risk Level				
MAT Provider	Most Recent MAT Stage	High	Low	Moderate		Total
Mchale, Robert	Maintenance	0	3	0	0	3
	Stabilization	17	4	15	0	36
		0	0	0	3	3
Sub Total		17	7	15	3	42
None Assigned	Induction	2	0	0	0	2
	Stabilization	2	0	2	0	4
		1	0	0	2	3
Sub Total		5		2	2	9
Total		22	7	17	5	51

MAT Case Manager Caseload Report [DT2]

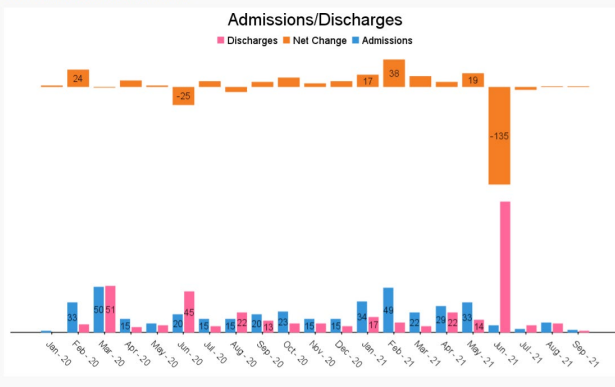
Client ID		Most Recent TCM Risk Level				
Case Manager/Family Partner	Most Recent MAT Stage	High	Low	Moderate		Total
Cowan, Brittany	Induction	1	0	0	0	1
	Maintenance	0	2	0	0	2
	Stabilization	15	2	15	0	32
		1	0	0	1	2
Sub Total		17	4	15	1	37
Crayton, Jerry		0	0	0	1	1
Sub Total					1	1
None Assigned	Stabilization	1	2	0	0	3
		0	0	0	3	3
Sub Total		1	2		3	6
Richardson, Nicole	Induction	1	0	0	0	1
	Maintenance	0	1	0	0	1
	Stabilization	3	0	2	0	5
Sub Total		4	1	2		7
Total		22	7	17	5	51



Referral Management

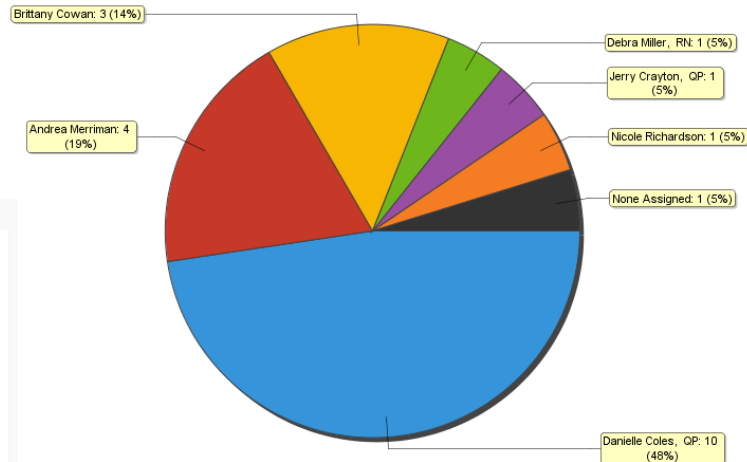
We can monitor referrals by staff assignment and evaluate appropriate case load for care management teams. We can easily view our monthly admissions and discharges.

MAT Episode Admission Discharge



TCM Dashboard Assigned Staff (Structural) [DT2]

Staff Assigned to Accepted Referrals



Productivity

We are able to look at predictive scheduling to ensure care managers can meet productivity for the following week.

We are able to see total completed services by week and month along with total duration of services rendered by month per employee.

TCM Dashboard: (Productivity) Scheduled Services (Next 7 Days) [DT2]

Number of Scheduled Appts		Visit Status		
Employee		NOTPRESENT	SCHEDULED	Total
Berry, Marcus		0	17	17
Coles, Danielle		0	15	15
Cowan, Brittany		0	13	13
Crayton, Jerry		2	10	12
Miller, Debra		0	2	2
Richardson, Nicole		0	18	18
Total		2	75	77

TCM Dashboard: Productivity (Completed Activities) Services by Employee [DT2]

Number of Services		Employee						
Service Date		Berry, Marcus	Coles, Danielle	Cowan, Brittany	Crayton, Jerry	Merriman, Andrea	Richardson, Nicole	Total
09/07/2021		1	4	1	6	2	8	22
09/08/2021		2	7	3	4	9	8	24
09/09/2021		6	2	5	2	8	9	24
09/10/2021		3	8	4	3	8	4	29
Total		12	19	13	15	2	29	90

TCM Dashboard: Productivity (Completed Activities) Duration by Employee [DT2]

Total Duration (Hours)		Employee						
Service Date		Berry, Marcus	Coles, Danielle	Cowan, Brittany	Crayton, Jerry	Merriman, Andrea	Richardson, Nicole	Total
09/07/2021		0.3	0.7	0.5	25.9	2.0	4.0	33.3
09/08/2021		0.8	2.8	1.5	2.3	8.9	4.5	11.4
09/09/2021		2.3	0.4	3.5	1.0	0.0	4.5	11.7
09/10/2021		1.3	1.4	2.5	1.7	0.0	2.0	8.8
Total		4.5	5.3	8.0	30.9	2.0	14.5	65.2



Coming Due Assessment Management

Active Episodes	Assigned Employee	Role	Risk Stratification Level	Qualifying Service Count	No Shows	Duration (Hours)	Meets Productivity Expectations	Completed CCA?	Care Mgmt Intake Completion	Care Mgmt Reassess	NOMS	PCP Creation/Revision	PCP Expiration	SDOH	SDOH Plan	PHQ-9	URICA	ASAM
CCBHC-ALL, CCBHC-TCM, MEDMGMT, OP REGISTRATN	Miller, Debra	Case Manager	Low	0			No	Yes		10/29/2021	09/29/2021	11/29/2021	05/24/2022	10/12/2021		01/19/2022	No Record	N/A
CCBHC-ALL, CCBHC-OT, CCBHC-TCM, MEDMGMT, REGISTRATN	Crayton, Jerry	Case Manager	Low	5		25.5	Yes	Yes		No Record	11/16/2021	No PCP	No PCP	09/23/2021		02/02/2022	10/14/2021	N/A
CCBHC-ALL, CCBHC-TCM, MAT, OP	Cowan, Brittany	Case Manager	Low	0	2		No	Yes		No Record	11/05/2021	11/07/2021	11/09/2021	11/07/2021		02/18/2022	11/07/2021	01/26/2022
CCBHC-ALL, CCBHC-TCM	Richardson, Nicole	Case Manager	Low	5		2.5	Yes	Yes		No Record	10/29/2021	11/17/2021	11/17/2021	10/31/2021		Overdue	11/02/2021	Overdue

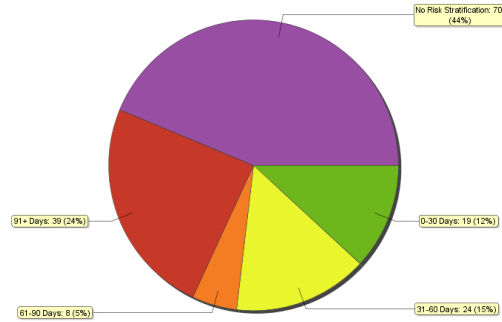
We are now able to identify where we have assessments that are need to be captured or updated. This helps us ensure that we are meeting care delivery expectations.



Insight Into Patient Follow Up

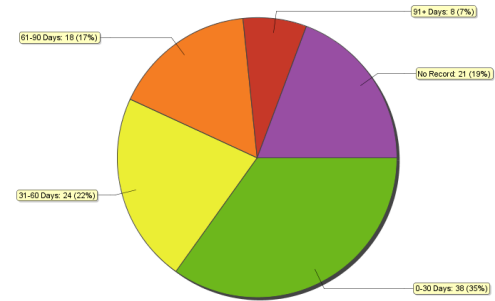
TCM Dashboard (Structural) Risk Stratification [DT2]

Most Recent Risk Stratification within 90 Days of Present Date



TCM Dashboard - PCP Details [DT2]

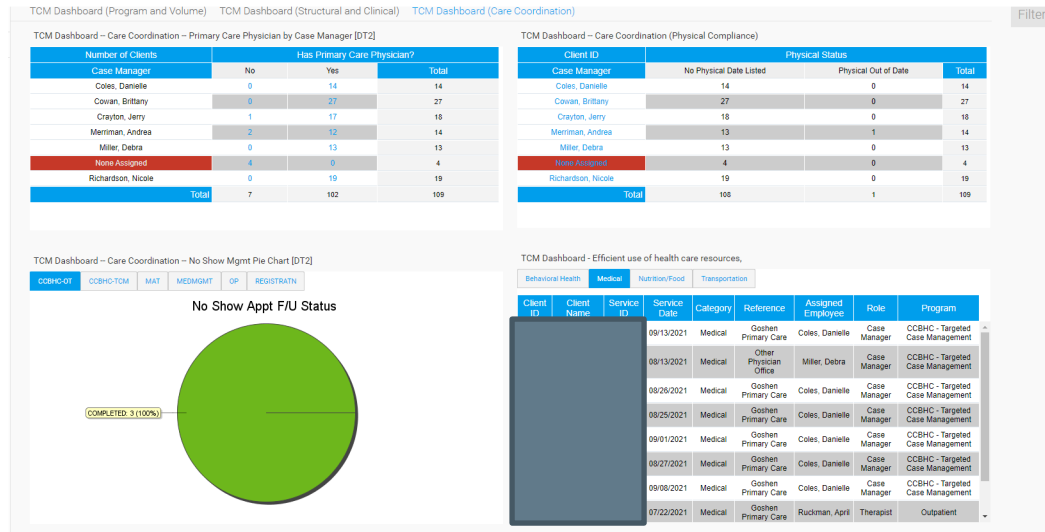
PCP Service Within Last 90 Days?



Credible BI allows us the ability to see when we have gaps in specific assigned patient tasks.



Care Coordination



We can look at different integrated care aspects and support coordination of care. We can track all referrals made by care managers to outside community partners.



Evaluating Impact On SDOH

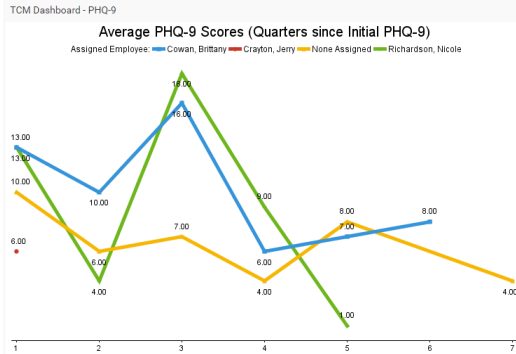
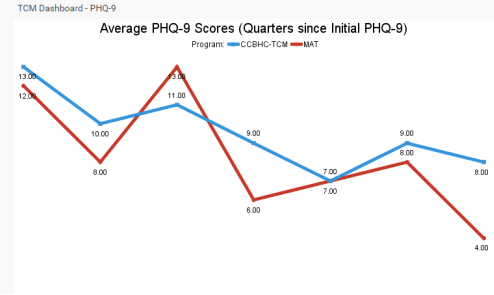
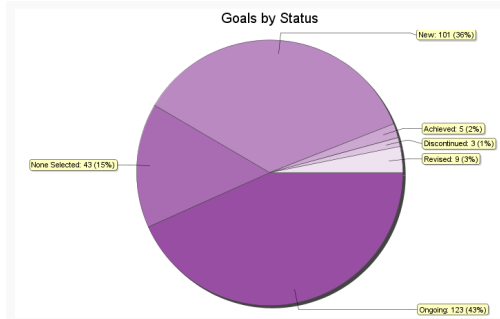
TCM Dashboard SDOH Gap Analysis [DT2]

Assigned Employee	Role	Client ID	Client	Initial SDOH Service Location	Initial SDOH Program	Initial SDOH Service Date	Most Recent Reassessment Date	Initial SDOH/6 Month SDOH Differ Flag	Initial SDOH Positive Response Flag	Initial SDOH Negative Response Flag	Most Recent Positive Response Flag	Most Recent Negative Response Flag
Coles, Danielle	Case Manager	[REDACTED]	[REDACTED]	BH-Stanly	OP	02/04/2021	08/31/2021	16	15	6	8	13
Coles, Danielle	Case Manager			BH-Stanly	CCBHC-TCM	03/08/2021	07/30/2021	2	14	8	16	6
Coles, Danielle	Case Manager			BH-Stanly	MEDMGMT	05/25/2021	08/30/2021	4	18	4	18	4
Cowan, Brittany	Case Manager			BH-Stanly	MAT	02/08/2021	07/12/2021	7	20	2	22	
Cowan, Brittany	Case Manager			BH-Stanly	OP	03/30/2021	08/09/2021	19	20	2	6	16
Cowan, Brittany	Case Manager			BH-Stanly	MAT	02/18/2021	08/23/2021	4	16	2	16	6
Cowan, Brittany	Case Manager			BH-Stanly	MAT	03/16/2021	08/30/2021	9	10	11	20	2
Cowan, Brittany	Case Manager			BH-Stanly	CCBHC-OT	03/01/2021	09/13/2021	6	17	5	20	1
Cowan, Brittany	Case Manager			BH-Stanly	MAT	01/26/2021	07/26/2021	6	10	12	18	4
Cowan, Brittany	Case Manager			BH-Stanly	MAT	03/03/2021	06/09/2021	7	22		20	2
Cowan, Brittany	Case Manager			BH-Stanly	MEDMGMT	01/19/2021	06/15/2021	6	11	7	13	9
Cowan, Brittany	Case Manager			BH-Stanly	MEDMGMT	01/27/2021	07/26/2021	6	17	5	15	7
Cowan, Brittany	Case Manager			BH-Stanly	MAT	04/01/2021	08/12/2021	6	10	11	17	5

Through Data we are now able to see the type of impact our care managers are having with individuals who have identified barriers with Social Determinants of Health (SDOH).



Clinical Outcomes



We can look at average clinical scores and goal status to help evaluate impact on clinical outcomes.

We also have drill down capability in order to see the staff members who are having the biggest impact on outcomes.





Key Takeaways

- Efficiency as Motivation
- Actionable Reports/Dashboard
- Timely Reporting
- Leverage Clin-Ops Partnerships

Questions
