



Business Intelligence Dashboards for Providers User Guide

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Provider BI Dashboards

Overview

DISCLAIMER

The **Provider BI Dashboards** feature is activated by HHAX System Administration. Please contact [Client Success](#) for further information.

A **Dashboard** is a collection of components (*cards, widgets, and filters*) that enable users to visualize and gauge key performance indicators (KPIs) from a centralized location. Information is organized according to business function or business unit (for example, Sales, Operations, and Systems).

Through a series of clicks, users can quickly view metrics and examine the data behind what is generating the information (from high-level to specific details). There are various functional commonalities from one dashboard to another.

This process guide is designed to describe the various aspects and functionality of the HHAExchange (HHAX) Business Intelligence (BI) Dashboard. The purpose of this guide is to provide information and instructions when navigating and using the application.

There are two sets of navigational instructions for the various available dashboards:

- The newly designed [Dashboard Navigation](#) applies to dashboards updated *after* December 2022.
- The [Classic Dashboard Navigation](#) applies to current dashboards, developed *before* December 2022.

To address any questions or concerns regarding the content herein contact Client Support via the [Client Support Portal](#).

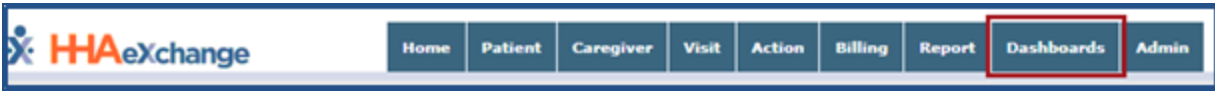
HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAExchange

HHAExchange BI Dashboard

The HHAExchange (HHAX) Business Intelligence (BI) Dashboard module is located within the HHAX application’s Navigation Panel. Click **Dashboards** to access the *Dashboards* page.



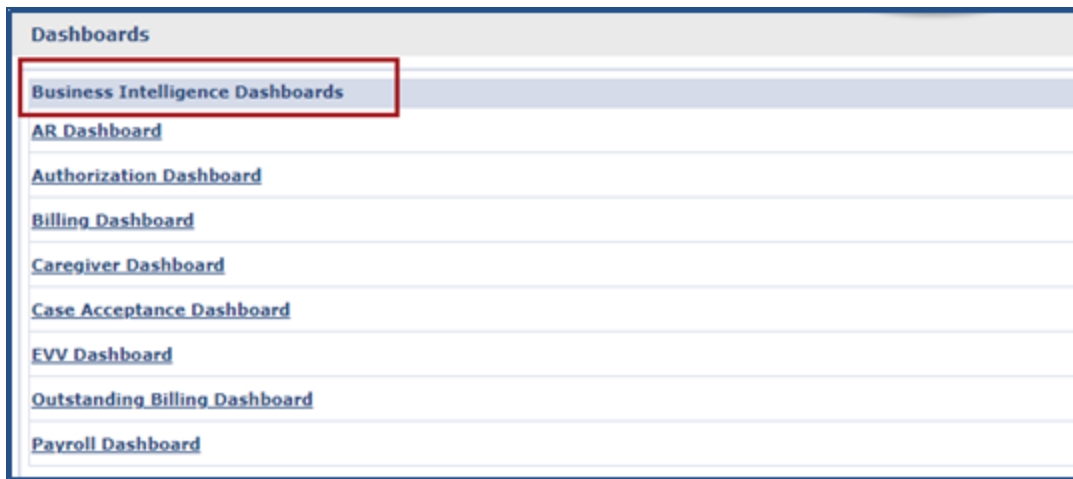
HHAExchange BI Dashboard Module

Notes:

- *Dashboard functionality is available to all Agencies and permissions are role-based. Permissions for each Dashboard must be activated for a role to access a particular dashboard. Permissions are managed by HHAX System Administration.*
- *Users only have access to the Offices they are associated with or assigned to in the HHAX User Account; therefore, can only see data for those Offices.*

Available Dashboards

The following image illustrates the available Business Intelligence Dashboards via links on the *Dashboards* page, each concentrating exclusively on key areas of the business. Click on the respective dashboard link to access the desired dashboard. Each dashboard is covered with detailed descriptions of its contents and functionality in later sections of this guide.



Provider Dashboard Landing Page

Notes:

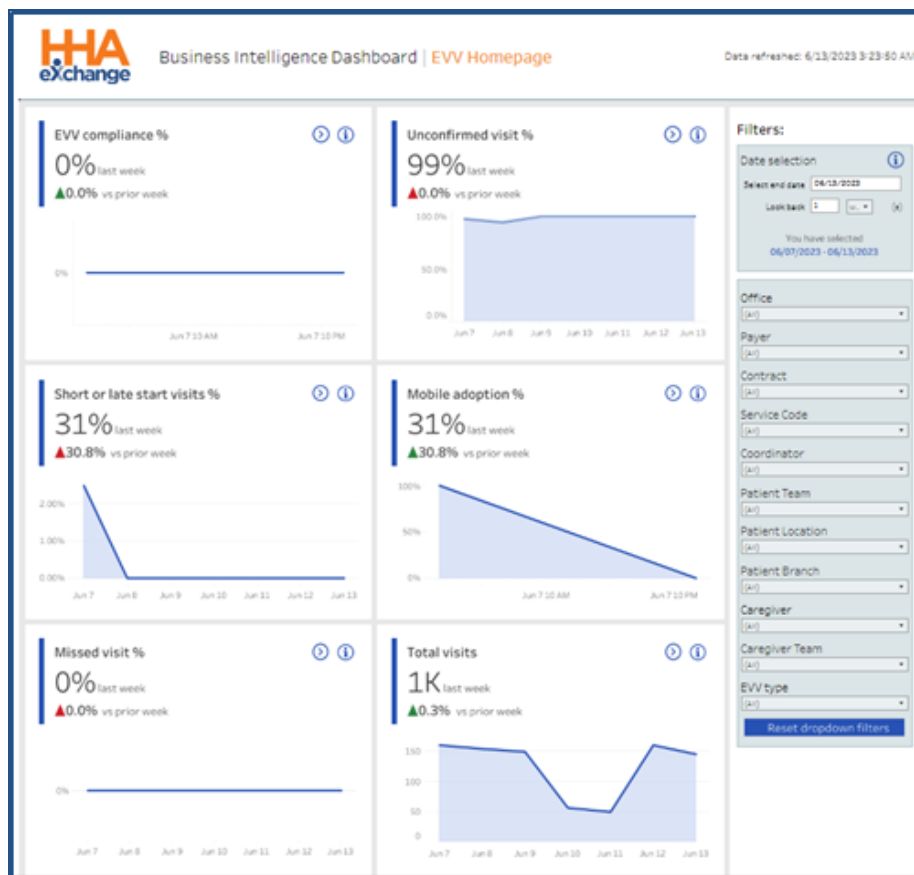
- *The data presented on all HHAX BI Dashboards is directly derived from the information entered in the HHAX application (based on various source tables and formulas which calculate the outcome).*
- *The Care Insights Dashboard is visible only to those Providers who use the Care Insights functionality.*

EVV Dashboard

The **EVV Dashboard** offers an array of information pertaining to the Electronic Visit Verification (EVV) methods utilized at HHAX. With emphasis on compliance, this dashboard displays monthly trends, compliance ratios, exceptions, various types of visits, as well as data indicating where Coordinators stand in meeting compliance standards (by ratio, exceptions, and visits).

The EVV Homepage Dashboard is comprised of several cards offering a high-level view of percentages and trends for *EVV Compliance*, *Unconfirmed Visits*, *Short or Late Start Visits*, *Mobile Adoption*, *Missed Visits*, and *Total Visits*, as seen in the image below.

Refer to the [Navigating Dashboards](#) section to learn how to navigate in this dashboard.



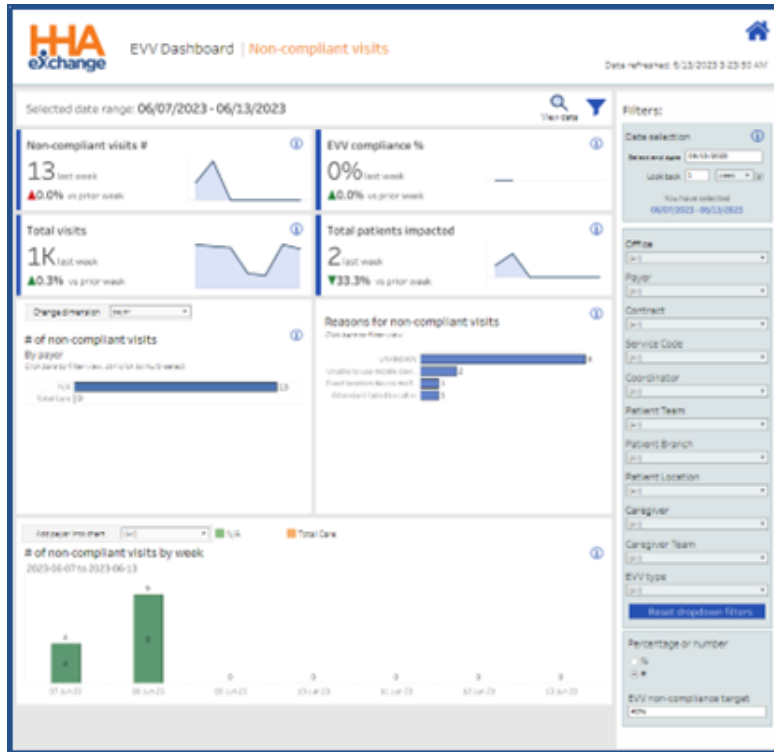
EVV Homepage Dashboard

This section covers the EVV Dashboard, offering a view of each page and descriptions of the cards and widgets.

Use the filter feature, on the right pane of the screen to generate results for specific criteria (such as **Date Range**, **Office**, **Caregiver**, **EVV Type**, etc.). Filter options may vary according to the selected widget, or card.

EVV Compliance (Non-Compliant Visits)

The image below illustrates the Non-Compliant Visits set of cards and widgets.



EVV Dashboard: Non-Compliant Visits


Cards – Non-Compliant Visits

EVV Compliance cards are described in the following table.

Card	Description
Non-Compliant Visits #	Number of Non-Compliant visits in the last week and the comparison to the previous week.
EVV Compliance %	Percentage of EVV-compliant visits (Confirmed, excluding Exceptions) for the week in comparison to the prior week.
Total Visits	Total number of visits in the last week and the comparison to the previous week.
Total Patients Impacted	Total number of Patients (Members) visited in the past week and the comparison to the previous week.

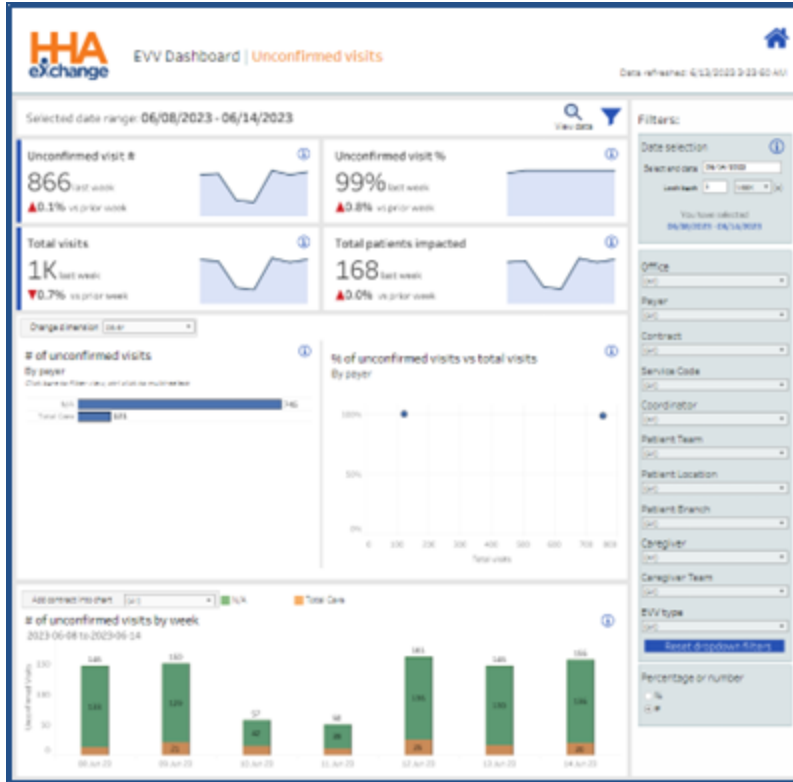
Widgets – Non-Compliant Visits

EVV Compliance widgets are described in the following table.

Widget	Description
# of Non-Compliant Visits	<p>Compare the number of Non-Compliant visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Non-Compliant Visits Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Reason for Non-Compliant Visits	<p>Displays the number of Non-Compliant visits by Non-Compliance reasons and the frequency (number) the reason is used.</p>
# of Non-Compliant Visits by Week	<p>This graph displays the total number of Non-Compliant visits trend by week. Select one or more specific Payers from the Add Payer into Chart dropdown field to view a comparison.</p>

Unconfirmed Visits

The image below illustrates the Unconfirmed Visits set of cards and widgets.



EVV Dashboard: Unconfirmed Visits


Cards – Unconfirmed Visits

Unconfirmed Visits cards are described in the following table.

Card	Description
Unconfirmed Visits #	Number of Unconfirmed visits in the last week and the comparison to the previous week.
Unconfirmed Visits %	Percentage of Unconfirmed visits (excluding Missed Visits) for the week in comparison to the prior week.
Total Visits	Total number of visits in the last week and the comparison to the previous week.
Total Patients Impacted	Total number of Patients (Members) impacted by Unconfirmed visits for the past week and the comparison to the previous week.

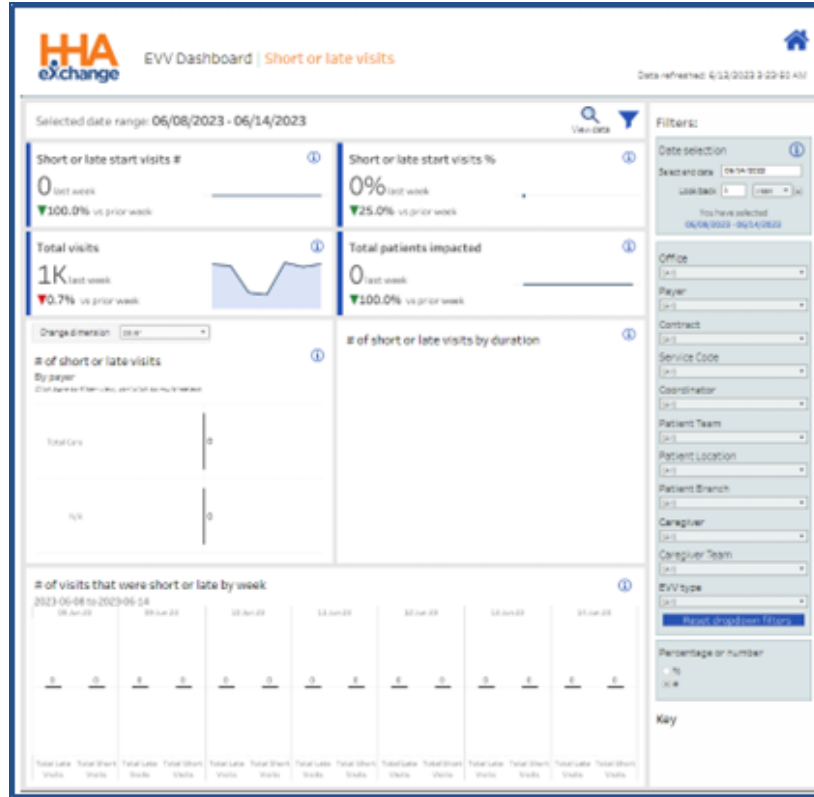
Widgets – Unconfirmed Visits

Unconfirmed widgets are described in the following table.

Widget	Description
# of Unconfirmed Visits by Payer	<p>Compare the number of Unconfirmed visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Unconfirmed Visits Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
% of Unconfirmed Visits vs Total Visits by Payer	<p>Plot graph displays the percentage of Unconfirmed visits versus the total number of visits.</p>
# of Unconfirmed Visits by Week	<p>This graph displays the total number of Unconfirmed visits trend by week. Select one or more specific Payers from the Add Payer into Chart dropdown field to view a comparison.</p>

Short or Late Start Visits

The image below illustrates the Short or Late Start Visits set of cards and widgets.



EVV Dashboard: Short or Late Start Visits


Cards – Short or Late Start Visits

Short or Late Start Visits cards are described in the following table.

Card	Description
Short or Late Start Visits #	Number of Short or Late Start visits in the last week and the comparison to the previous week.
Short or Late Start Visits %	Percentage of confirmed visits that are shorter than the scheduled duration or that began later than scheduled start time in comparison to the prior week.
Total Visits	Total number of visits in the last week and the comparison to the previous week.
Total Patients Impacted	Total number of Patients (Members) impacted by Short or Late Start visits for the past week and the comparison to the previous week.

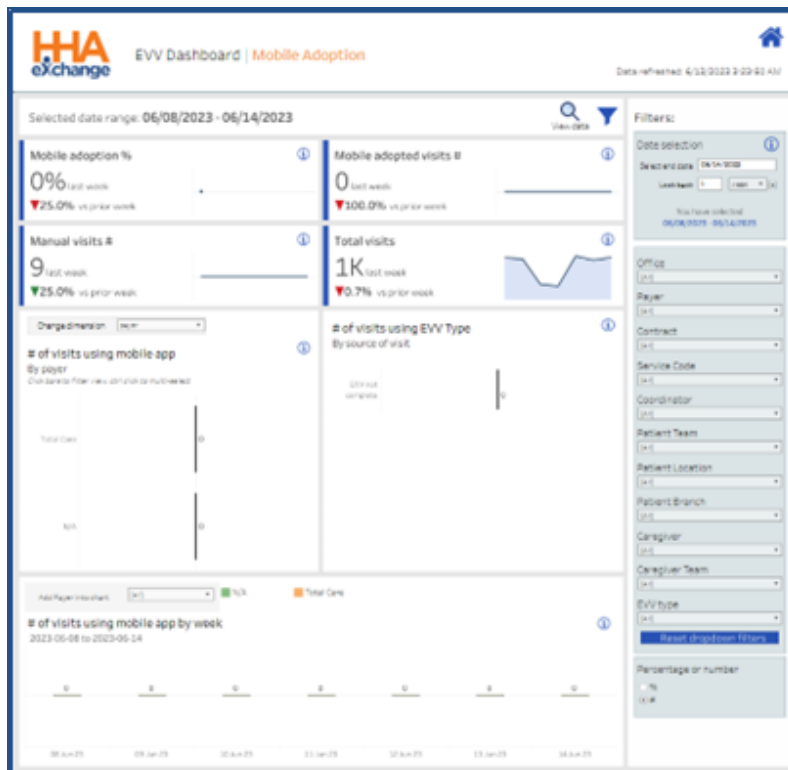
Widgets – Short or Late Start Visits

Short or Late Visits widgets are described in the following table.

Widget	Description
# of Short or Late Start Visits by Payer	<p>Compare the number of Short or Late Start visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Short or Late Start Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
% of Short or Late Start Visits by Duration	Displays the number of Short and Late Start Visits by duration (showing how short or late a visit is).
# of Short or Late Start Visits by Week	This graph displays the total number of Short and Late Start visits trend by week.

Mobile Adoption

The image below illustrates the Mobile Adoption set of cards and widgets.



EVV Dashboard: Mobile Adoption


Cards – Mobile Adoption

Mobile Adoption cards are described in the following table.

Card	Description
Mobile Adoption %	Percentage of EVV in the last week and prior week.
Mobile Adopted Visits #	Number of EVV visits for the last week in comparison to the prior week.
Manual Visits	Number of manually verified visits.
Total Visits	Total number of visits in the last week and the comparison to the prior week.

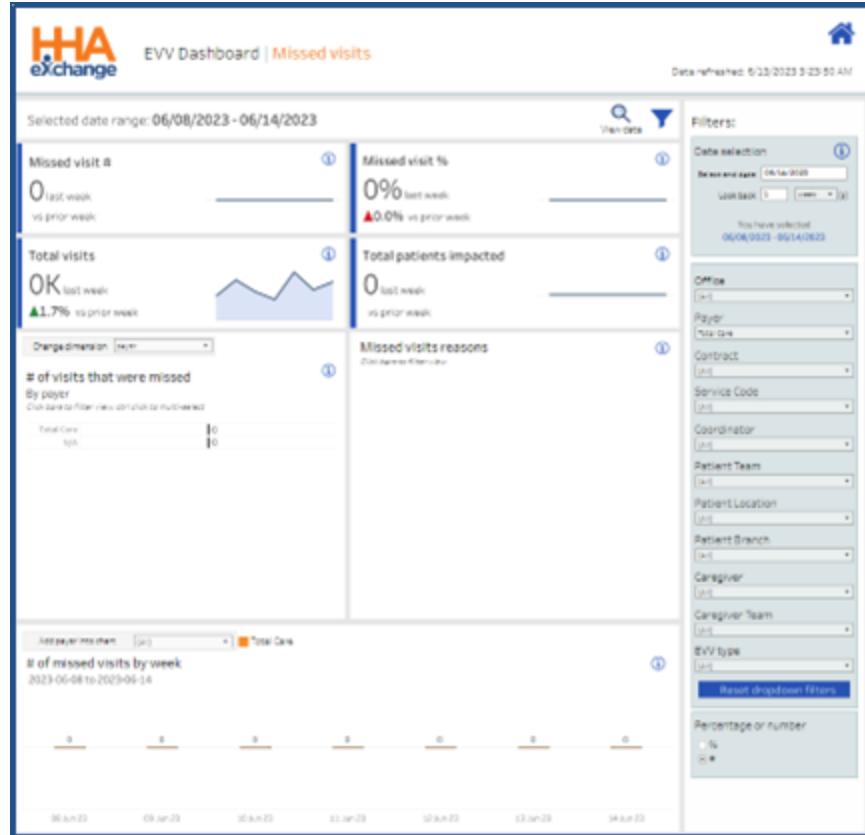
Widgets – Mobile Adoption

Mobile Adoption widgets are described in the following table.

Widget	Description
# of Visits using Mobile App by Payer	<p>Compare the number of EVV adopted visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code</i>, or <i>Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Mobile Adoption Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
# of Visits using EVV Type	Displays the number of EVV adopted visits by source of visit.
# of Visits using Mobile App by Week	This graph displays the total number of EVV Visits trend by week. Select one or more specific Payers from the Add Payer into Chart dropdown field to view a comparison.

Missed Visits

The image below illustrates the Missed visits set of cards and widgets.



EVV Dashboard: Missed Visits


Cards – Missed Visits

Missed visits cards are described in the following table.

Card	Description
Missed Visit #	Number of visits that never took place (selected as Missed in the <i>Visit Info</i> tab) in the last week and prior week.
Missed Visit %	Percentage of visits that never took place (selected as Missed in the <i>Visit Info</i> tab) in the last week and prior week.
Total Visits	Total number of visits in the last week and the comparison to the previous week.
Total Patients Impacted	Number of Patients impacted by Missed visits.

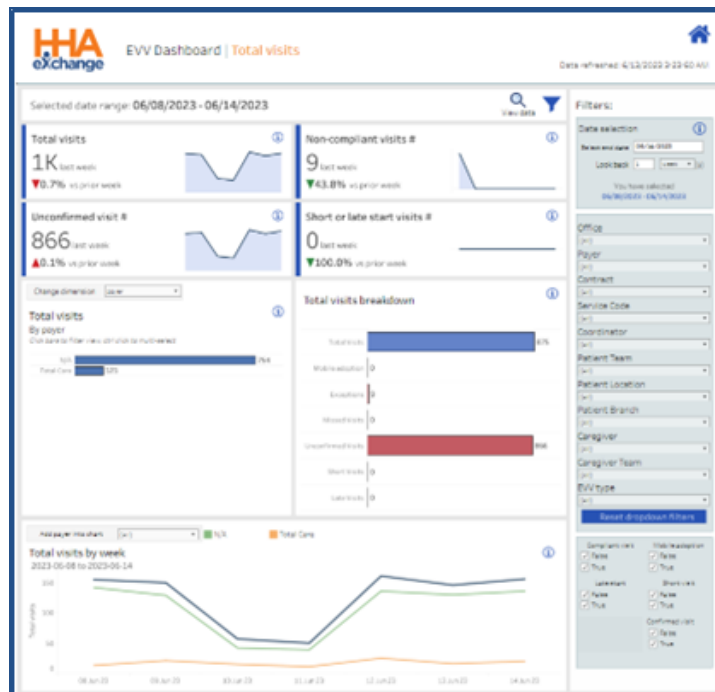
Widgets – Missed Visits

Missed visits widgets are described in the following table.

Widget	Description
# of Missed Visits by Payer	<p>Compare the number of EVV adopted visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Missed Visits Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Missed Visit Reason	Displays the number of Missed visits by Reason.
# of Missed Visits by Week	This graph displays the total number of Missed visits trend by week. Select one or more specific Payers from the Add Payer into Chart dropdown field to view a comparison.

Total Visits

The image below illustrates the Total visits set of cards and widgets.



EVV Dashboard: Total Visits


Cards – Total Visits

Total visits cards are described in the following table.

Card	Description
Total Visits	Total number of visits in the last week in comparison to the previous week.
Non-Compliant Visits #	Number of Non-Compliant visits in the last week in comparison to the previous week.
Unconfirmed Visits #	Number of visits that took place without confirmation (excluding Missed visits) in the last week and the prior week.
Short or Late Start Visits #	Number of confirmed visits that are shorter than the scheduled duration of that began later than scheduled start time in the last week in comparison to the prior week.

Widgets – Total Visits

Total visits widgets are described in the following table.

Widget	Description
Total Visits by Payer	<p>Compare the total number of visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Total Visits Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Breakdown of Total Visits	Displays the number of visits compared to other metrics in the dashboard.
Total Visits by Week	This graph displays the total number of visits trend by week. Select one or more specific Payers from the Add Payer into Chart dropdown field to view a comparison.

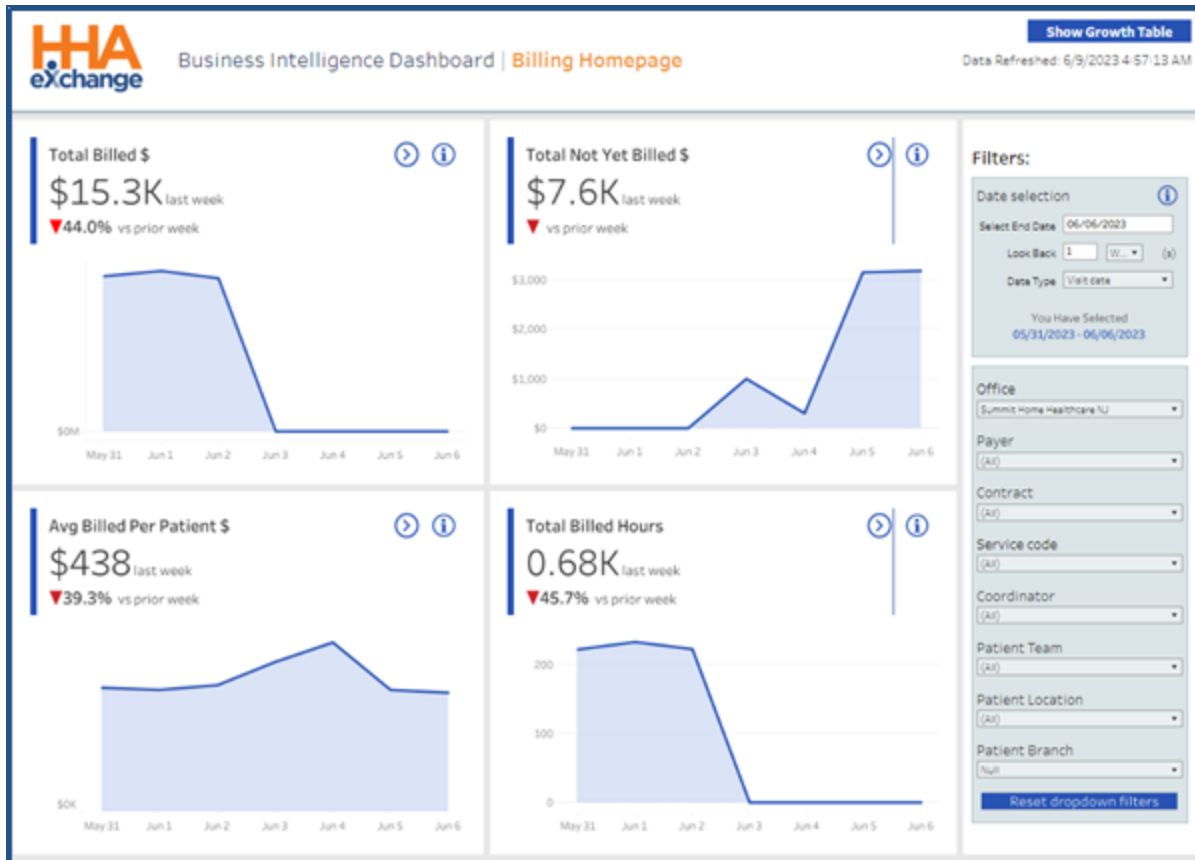
Billing Dashboard

The **Billing Dashboard** captures vital numbers pertaining to the billing and invoicing process of an Agency. The Billing Dashboard organizes information according to Coordinator teams. Information is provided by selecting either **Visit Date** or **Invoice Date** in the Filters section (to the right of each of the selected sub-dashboards).

While the Billing by *Invoice Date* displays financial information, the Billing by *Visit Date* selection displays the same data based on visit dates, which is essential from an operational perspective.

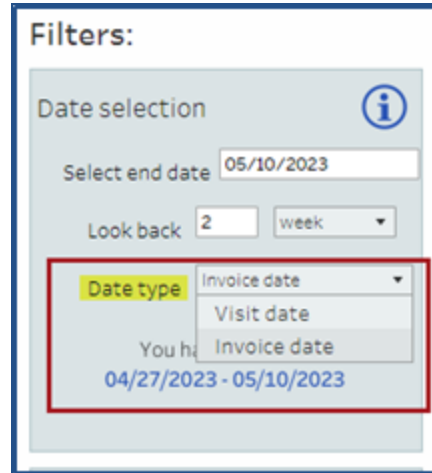
This section covers the Billing Dashboard offering descriptions and functionality of each section.

Refer to the [Navigating Dashboards](#) section to learn how to navigate in this dashboard.



Billing Homepage Dashboard

On the Billing Dashboards, a **Date Type** filter field is available to select if to display the information by Invoice Date or by Visit Date. This filter field is available for all Billing Dashboards.



Billing Date Type Filter Field

While the Billing by *Invoice Date* displays financial information, the Billing by *Visit Date* selection displays the same data based on visit dates, which is essential from an operational perspective.

Billing Homepage

Cards

The billing cards for the homepage are described in the following table. To drill down on a specific area from the Billing Homepage Dashboard, click on the **Navigate** icon (🔍) of a card to access the next set of cards and widgets. Refer to each subsection below for descriptions.

Card	Description
Total Billed \$	Total amount billed for the current week in comparison to the prior week.
Total Not Yet Billed \$	Total amount not yet billed for the current week in comparison to the prior week.
Average Billed Per Patient \$	Average dollar amount billed per Patient for the last week in comparison to the prior weeks.
Total Billed Hours	Total billed hours for the week in comparison to the prior week.

Show Growth Table

The Billing Homepage Dashboard provides a **Growth Table** that offers metrics by Payer. To access, click on the **Show Growth Table** button at the top-right corner of the Billing Homepage Dashboard screen.

The **Growth Table** shows billing metrics by Payer, as seen in the image below. This information can be filtered by *Visit Date* or *Invoice Date*, selected from the **Date Type** field in the *Filters* section.

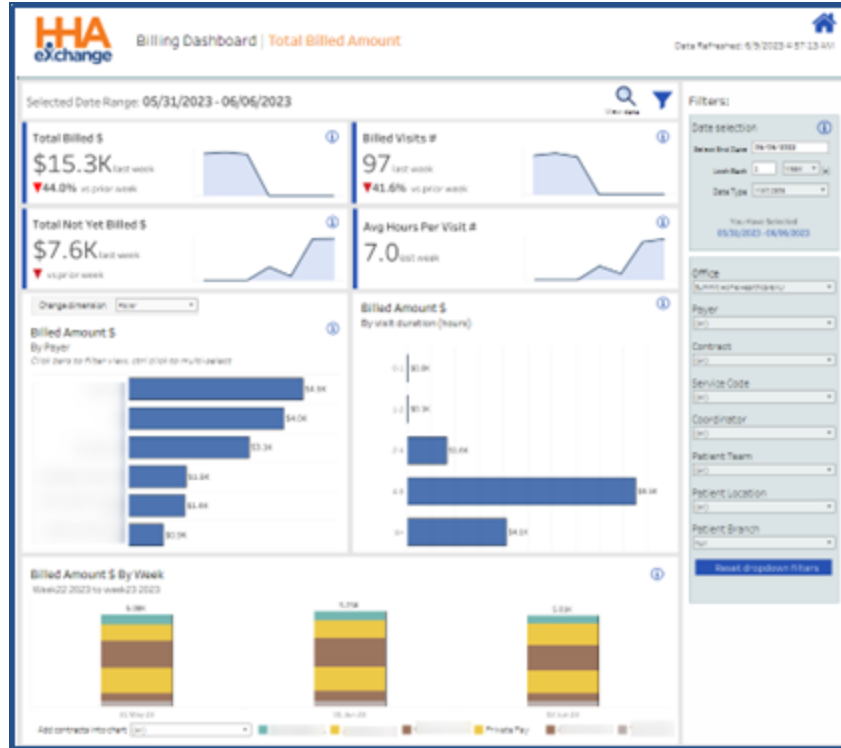
Index	Payer	Total Bill Amount YTD	Previous Total Bill Amount YTD	YTD Total Revenue over Previous	YTD % (YTD)	Last 90 Days	90 Days Revenue over Previous	YTD % (90 Days)	Total Last Month
1		\$54,64K	\$32,13K	22,49K	▲70.0%	\$27,37K	\$5,33K	▼19.7%	\$33,52K
2		\$332,37K	\$95,86K	23,55K	▲17.2%	\$56,15K	\$10,58K	▼18.9%	\$19,13K
3		\$394,50K	\$217,27K	17,23K	▼10.7%	\$87,39K	\$13,90K	▼11.6%	\$37,42K
4		\$128,90K	\$115,93K	12,97K	▲11.2%	\$70,20K	\$6,54K	▼9.0%	\$31,21K
5		\$73,49K	\$63,85K	7,63K	▲11.0%	\$39,62K	\$3,27K	▲9.0%	\$36,89K
6		\$53,29K	\$42,39K	10,90K	▲25.0%	\$29,66K	\$1,86K	▲6.7%	\$31,25K

Billing Dashboard: Growth Table

Click the home icon () at the top-right to return to the Billing Homepage Dashboard.

Total Billed Amount

The image below illustrates the Total Billed Amount set of cards and widgets.



Billing Dashboard – Total Billed Amount


Cards – Total Billed Amount

Total Billed Amount cards are described in the following table.

Card	Description
Total Billed \$	Total amount billed for the current week in comparison to the prior week.
# of Billed Visits	Number of billed visits for the week in comparison to the prior week.
Total Not Yet Billed \$	Total amount not yet billed for the last week in comparison to the prior week.
# of Average Hours Per Visit	Average number of hours per visit for the week in comparison to the prior week.

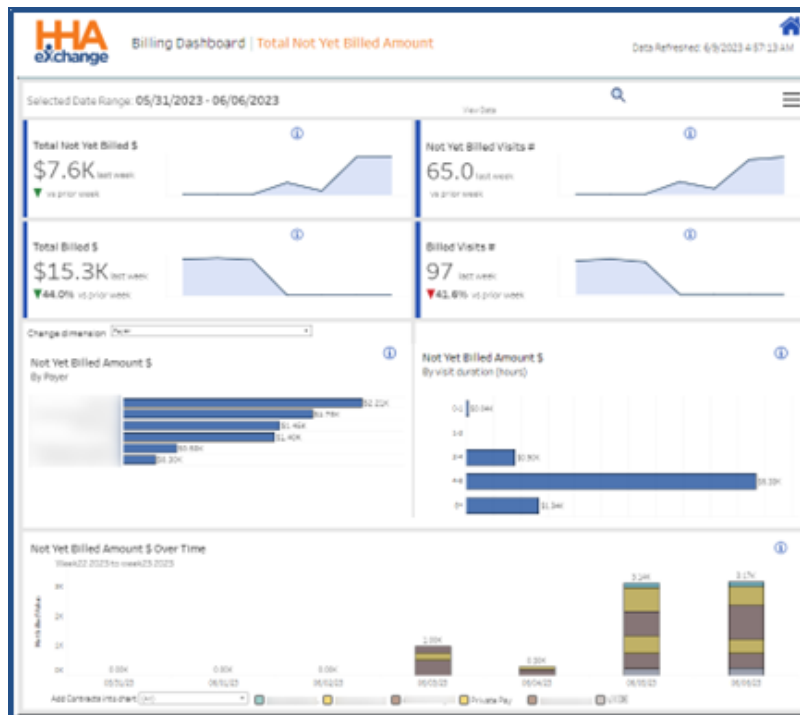
Widgets – Total Billed Amount

Total Billed Amount widgets are described in the following table.

Widget	Description
Billed Amount by Payer	<p>Compare the Billed Amount by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Total Billed Amount Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Billed Amount by Visit Duration	Displays the amount billed by visit duration (in hours).
Billed Amount by Week	This stack graph displays the total amount billed by week by Contracts. Select one or more specific Contracts from the Add Contracts into Chart dropdown field to view a comparison.

Total Not Yet Billed Amount

The image below illustrates the Total Not Yet Billed Amount set of cards and widgets.



Billing Dashboards – Total Not Yet Billed Amount


Cards – Total Not Yet Billed Amount

Total Not Yet Billed Amount cards are described in the following table.

Card	Description
Total Amount Not Yet Billed	Total amount not yet billed for the current week in comparison to the prior week.
# of Visits Not Yet Billed	Number of not yet billed visits for the week in comparison to the prior week.
Total Billed Amount	Total billed amount for the last week in comparison to prior week.
# of Billed Visits	The number of billed visits for the week in comparison to the prior week.

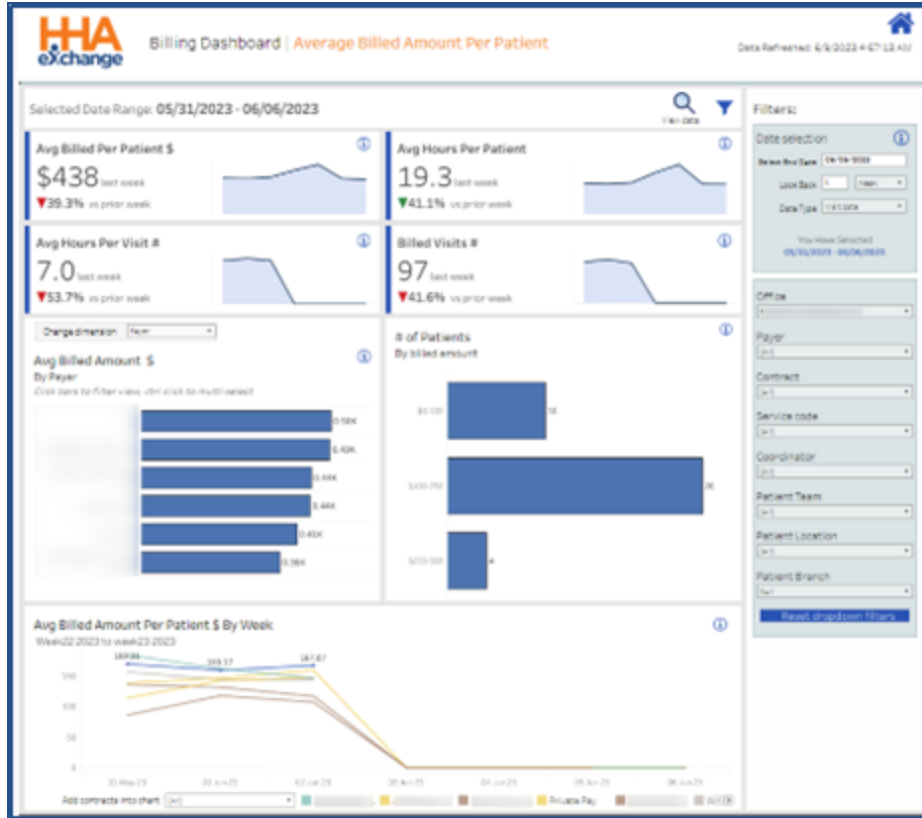
Widgets – Total Not Yet Billed Amount

Total Not Yet Billed Amount widgets are described in the following table.

Widget	Description
Not Yet Billed Amount by Payer	<p>Compare the Not Yet Billed Amount by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Total Not Yet Billed Amount Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Not Yet Billed Amount by Visit Duration (Hours)	Displays the number of Not Yet Billed Amounts by visit duration in hours.
Not Yet Billed Amount Over Time	This stack graph displays a trend of the total amount Not Yet Billed by week by Contracts. Select one or more specific Contracts from the Add Contracts into Chart dropdown field to view a comparison.

Average Billed Per Patient Amount

The image below illustrates the Average Billed per Patient Amount set of cards and widgets.



Billing Dashboards – Average Billed Amount Per Patient


Cards – Average Billed Amount Per Patient

Average Billed Amount per Patient cards are described in the following table.

Card	Description
Average Billed Amount Per Patient	Average billed amount per Patient for the current week in comparison to the prior week.
Average Hours per Patient	Number of average hours per Patient for the week in comparison to the prior week.
Average Number of Hours per Visit	Number of average hours per visit for the last week in comparison to prior week.
# of Billed Visits	The number of billed visits for the week in comparison to the prior week.

Widgets – Average Billed Amount Per Patient

Average Billed Amount per Patient widgets are described in the following table.

Widget	Description
Average Billed Amount per Payer	<p>Compare the Not Yet Billed Amount by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Average Billed Amount Per Patient Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Number of Patients by Billed Amount	Displays the number of Patients by billed amount.
Average Billed Amount per Patient by Week	This line graph displays a trend of the average amount billed per Patient by week by Contracts. Select one or more specific Contracts from the Add Contracts into Chart dropdown field to view a comparison.

Total Billed Hours/Visits

The image below illustrates the Total Billed Visits set of cards and widgets.



Billing Dashboards – Total Billed Visits


Cards – Total Billed Visits

Total Billed Visits cards are described in the following table.

Card	Description
Number of Billed Visits	Number of billed visits for the current week in comparison to the prior week.
Average Hours per Number of Visits	Number of average hours per visit for the week in comparison to the prior week.
Total Billed Hours	Number of total billed hours for the week in comparison to prior week.
Total Amount Billed	The billed amount for the week in comparison to the prior week.

Widgets – Total Billed Visits

Total Billed Visits widgets are described in the following table.

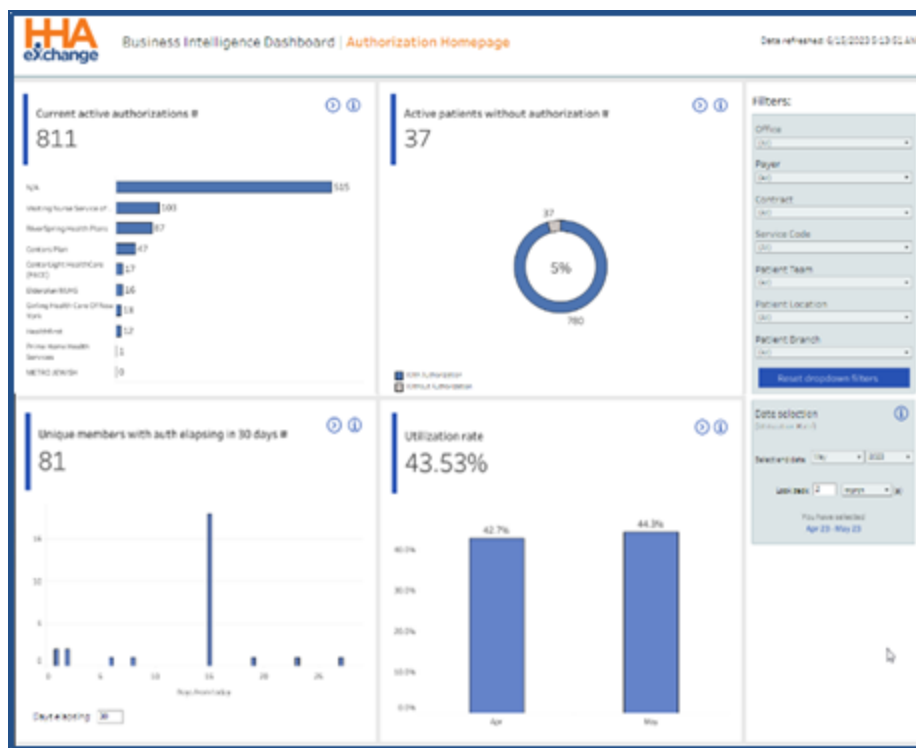
Widget	Description
Total Billed Visits by Payer	<p>Compare the Total Billed Visits by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Total Hours/Visits Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Authorized vs Billed Visits	<p>Displays the number of Authorized visits vs Billed visits by Contract.</p>
Total Billed Visits Over Time	<p>This stack graph displays a trend of the total billed visits by week by Contracts. Select one or more specific Contracts from the Add Contracts into Chart dropdown field to view a comparison.</p>

Authorization Dashboard

The Authorization Dashboard focuses on the various metrics that track the Authorization process at HHAX. The Authorization Dashboard captures data such as *Active Authorizations*, *Patients with No Authorization*, *Elapsing Authorization*, and *Utilization Rate*.

This section covers the Authorization Dashboard offering descriptions and functionality of each widget section.

Refer to the [Navigating Dashboards](#) section to learn how to navigate in this dashboard.



Authorization Homepage Dashboard

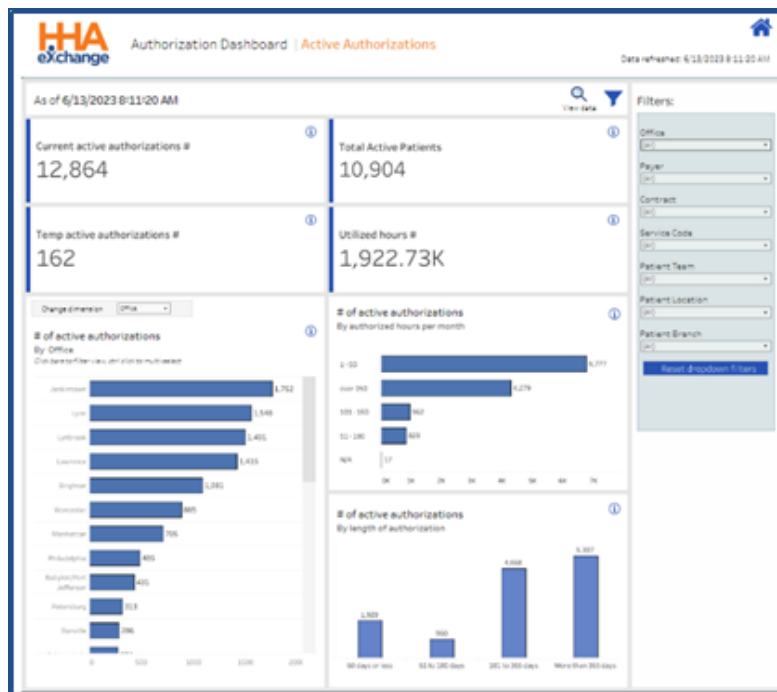
Authorization Homepage Cards

The cards on the Authorization homepage are described in the following table. To drill down on a specific area from the Authorization Homepage Dashboard, click on the **Navigate** icon () of a card to access the next set of cards and widgets. Refer to each subsection below for descriptions.

Card	Description
Current Active Authorization #	Total number of current <u>Active</u> Authorizations.
Active Patients Without Authorization #	Number of Patients who are currently Active with NO active authorization. This figure is independent from Payer, Contract, and Service Code filter.
Unique Member with Elapsing Authorizations (Days)	Number of Patients who have elapsing authorizations within the selected number of days and have no replacement authorization. Enter a specific number of days in the Days Elapsing text field for more specific results.
Utilization Rate	Displays the percentage of total Utilization rate.

Current Active Authorizations

The image below illustrates the Current Active Authorizations set of cards and widgets.



Authorization Dashboards: Current Active Authorizations


Cards – Current Active Authorizations

Average Current Active Authorizations cards are described in the following table.

Card	Description
Current Active Authorizations	Total number of current <u>Active</u> authorizations.
Total Active Patients	Number of Patients who are currently <u>Active</u> .
Temp Active Authorizations #	Number of Temporary Authorizations.
Utilized Hours	The average maximum number of hours approved per authorization.

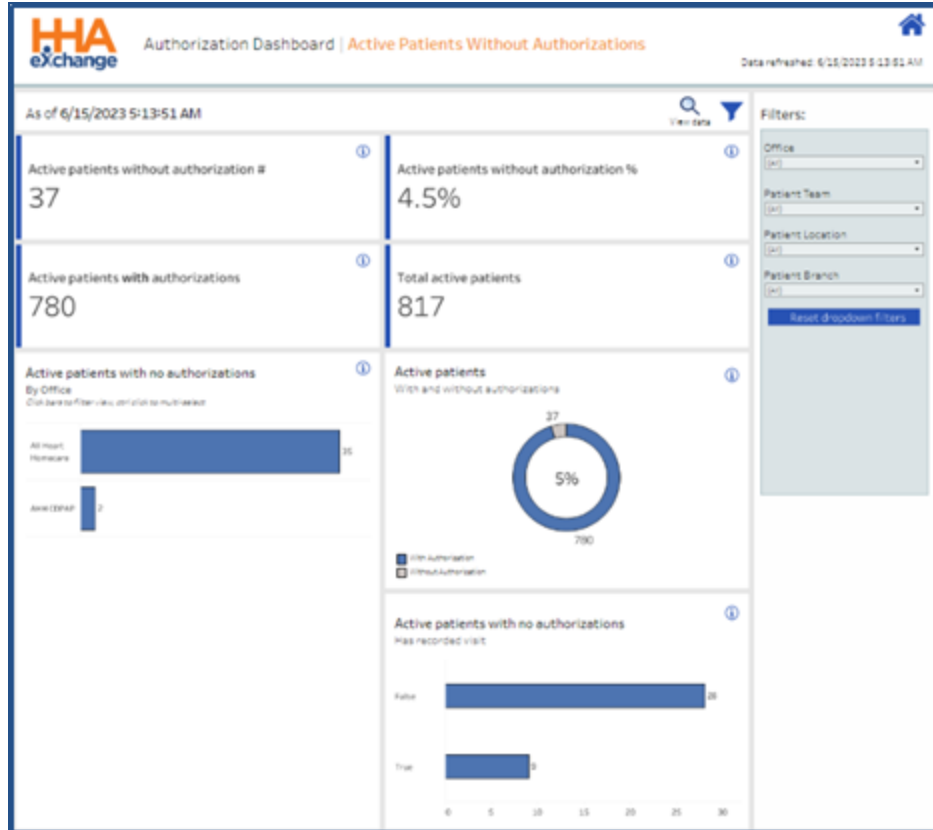
Widgets – Current Active Authorizations

Current Active Authorizations widgets are described in the following table.

Widget	Description
# of Active Authorizations by Payer	<p>Number of currently <u>Active</u> Authorizations by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code</i>, or <i>Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Active Authorization Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
# of Active Authorizations by Authorized Hours per Month	Number of currently <u>Active</u> Authorizations, categorized by hours per month.
# of Active Authorizations by Length of Authorization	Number of currently <u>Active</u> Authorizations by length of days.

Active Patients Without Authorization

The image below illustrates the Active Patients Without Authorization set of cards and widgets.



Authorization Dashboards: Active Patients Without Authorizations


Cards –Active Patient Without Authorizations

Active Patients without Authorization cards are described in the following table.

Card	Description
Active Patients Without Authorizations #	Number of currently <u>Active</u> Patients with NO active Authorization.
Active Patients Without Authorizations %	Percentage of currently <u>Active</u> Patients with NO active Authorization.
Active Patients With Authorizations #	Number of currently <u>Active</u> Patients with active Authorization.
Total Active Patients	Total number of currently <u>Active</u> Patients.

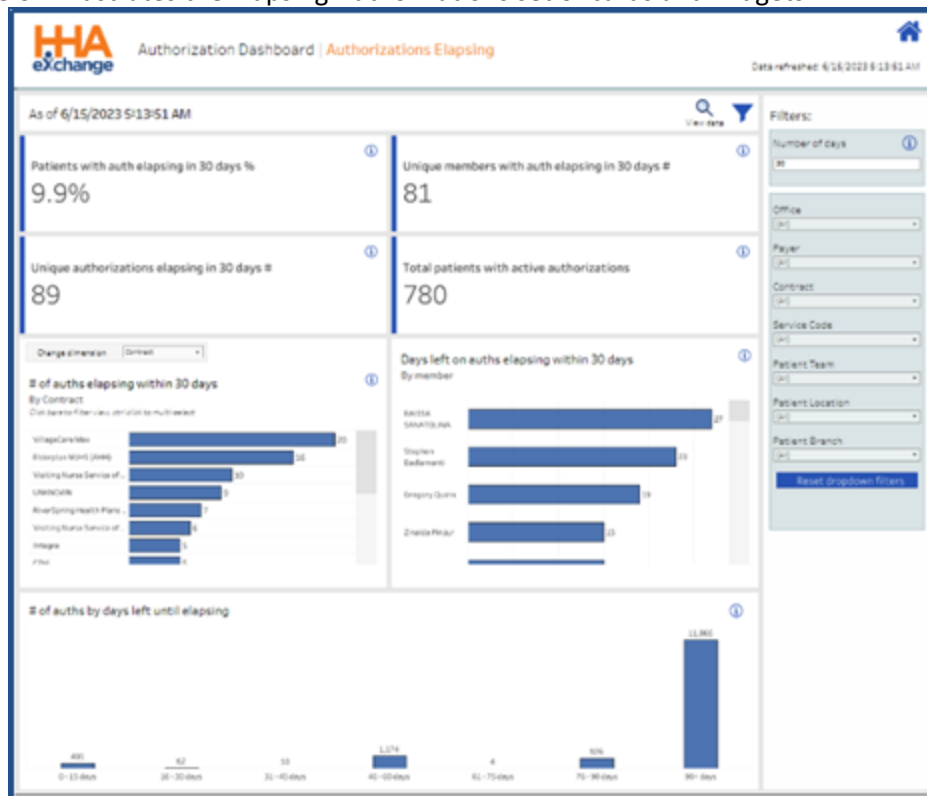
Widgets – Current Active Authorizations

Active Patients without Authorization widgets are described in the following table.

Widget	Description
Active Patients with NO Authorizations by Office	Number of currently <u>Active</u> Patients with NO Authorization by Payer. Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Active Patients Without Authorization Report</i> . Report data can be sorted by columns and downloaded in Excel or CSV format.
Active Patients (with or without Authorizations)	Number of currently <u>Active</u> Patients with NO active Authorization by Payer.
Active Patients with NO Authorizations (with Recorded Visit)	Bar graph shows the number of currently <u>Active</u> Patients with NO active Authorization, defined by a recorded visit.

Elapsing Authorizations

The image below illustrates the Elapsing Authorizations set of cards and widgets.



Authorization Dashboards: Elapsing Authorizations


Cards –Elapsing Authorizations

Elapsing Authorizations cards are described in the following table.

Card	Description
Patients with Elapsing Authorization in 30 Days %	Percentage of Patients who have elapsing authorizations within the selected number of days.
Unique Members with Elapsing Authorization in Days	Number of Patients who have elapsing authorizations within the selected number of days.
Unique Elapsing Authorizations in Days #	Number of unique elapsing Authorizations within the selected number of days.
Total Patient with Elapsing Authorizations	Number of currently <u>Active</u> Patients with active Authorizations.

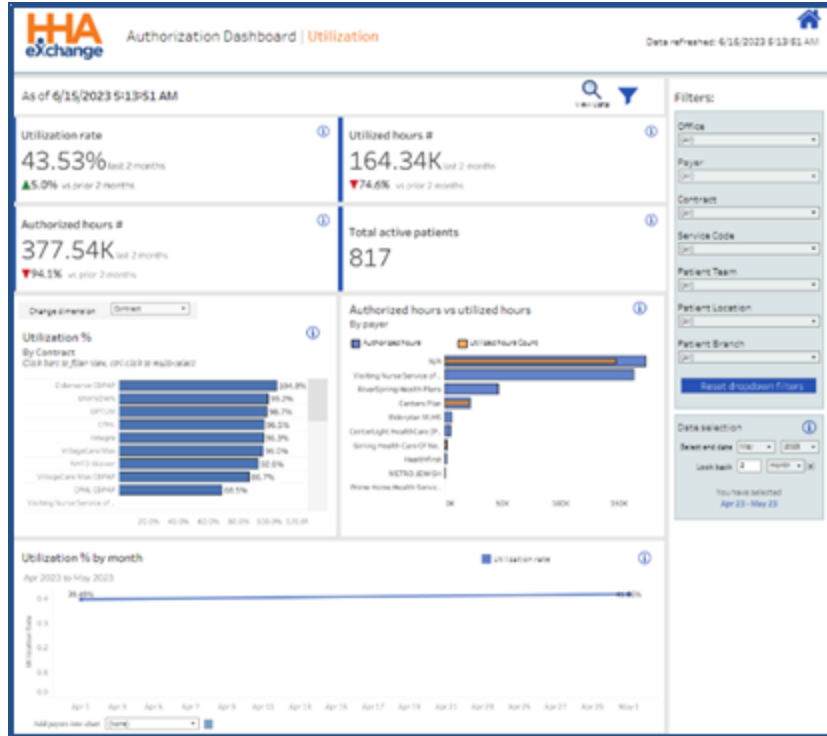
Widgets – Elapsing Authorizations

Elapsing Authorizations widgets are described in the following table.

Widget	Description
# of Elapsing Authorizations in 30 Days by Payer	<p>Number of unique elapsing Authorizations within the selected number of days by Payer. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Authorization Elapsing with 30 Days Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
Days Left on Elapsing Authorization Within 30 Days (by Member)	List of Patients with elapsing Authorizations, in order (from soonest to latest).
# of Authorizations by Days Left Until Elapsing	Number of unique Authorizations by days left until elapsing.

Utilization Rate

The image below illustrates the Utilization Rate set of cards and widgets.



Authorization Dashboards: Utilization Rate


Cards –Utilization Rate

Utilization Rate cards are described in the following table.

Card	Description
Utilization Rate	Percentage of Utilization Rate for the last 2 months, compared to the previous 2 months.
Utilized Hours	Number of utilized hours for the last 2 months, compared to the previous 2 months.
Authorized Hours	Number of authorized hours for the last 2 months, compared to the previous 2 months.
Total Active Patients	Number of currently <u>Active</u> Patients with active Authorizations.

Widgets – Utilization Rate

Utilization Rate widgets are described in the following table.

Widget	Description
<p>Utilization % by Payer</p>	<p>Percentage of utilization by Payer. Click on one or more bars to focus on specific Payers. From the Change Dimension dropdown field, select by <i>Payer, Caregiver, Contract, Office, Service Code, or Coordinator</i> to view specific details.</p> <p>Click on the View Data magnifying glass icon () at the top header of the page to view the <i>Utilization Table Report</i>. Report data can be sorted by columns and downloaded in Excel or CSV format.</p>
<p>Authorized Hours vs Utilized Hours (by Payer)</p>	<p>Bar graph shows the comparison of Authorized hours with Utilized hours by Payer.</p>
<p>Utilization % by Month</p>	<p>In this dual-graph, the line chart represents the Unconfirmed visits (percentage or number of) and the bar chart displays the total number of visits. The line and the bars work from two separate axes allowing for the total number of visits (bars) to provide context for the shape of the Unconfirmed visits (line).</p> <p>The time scale of the chart is determined by the period selected in the filters. When Week or Month is selected the chart displays the data at a weekly level; whereas, when Quarter or Year is selected the chart is divided at a monthly level.</p>

Payroll Dashboard

The **Payroll Dashboard** captures data such as *Total Payroll Per Year*, *Payroll for Current Week*, *Payroll by Category*, and *OT Payroll*, among other figures. As with other dashboards, the Payroll Dashboard includes filters and indicator widgets to assist in obtaining specific information.

This section covers the Payroll Dashboard in its entirety from key terms and formulas to descriptions and functionality of each widget section.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



Sample Payroll Dashboard

Payroll Dashboard – KPIs, Formulas, and Key Terms

The following tables describe key terms, indicator definitions, and formulas used in context with the Payroll Dashboard.

KPIs as defined in the Payroll Dashboard:	
Total Payroll	Total Payroll for selected Office and Batch Date Total Hours for selections
Regular Hours	Regular Payroll for selected Office and Batch Date Regular Hours for selections
OT Hours	OT Payroll for selected Office and Batch Date OT Hours for selections
Non-Skilled Average Pay Rate	Average Non-Skilled Regular Pay Rate for selected Office and Batch Date Average Non-Skilled OT Pay Rate for selections
Skilled Average Pay Rate	Average Skilled Regular Pay Rate for selected Office and Batch Date Average Skilled OT Pay Rate for selections

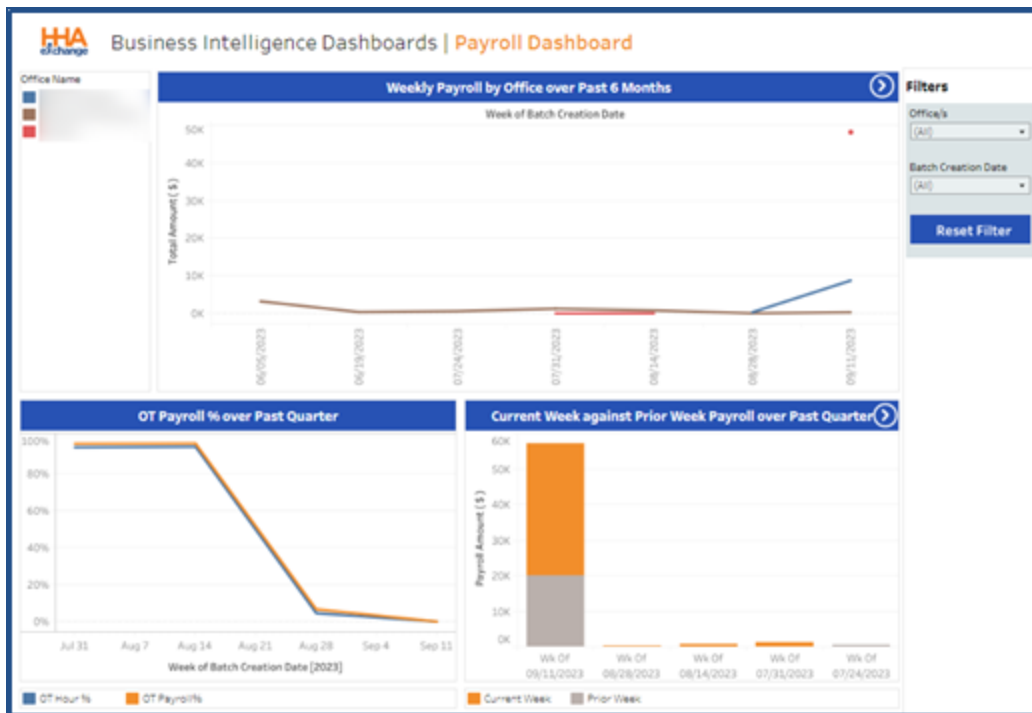
Formulas used to calculate the various widgets in Payroll Dashboard:	
Non-Skilled Average Pay Rate	Total Regular Payroll Amount <i>divided by</i> the Total Regular Hours of all Non-Skilled Visits
Skilled Average Pay Rate	Total Regular Payroll Amount <i>divided by</i> the Total Regular Hours for all Skilled Visits
Non-Skilled OT Average Pay Rate	Total OT Payroll Amount <i>divided by</i> the Total OT Hours for all Non-Skilled Visits
Skilled OT Average Pay Rate	Total OT Payroll Amount <i>divided by</i> the Total OT Hours for all Skilled Visits
OT Payroll Percentage	Total OT Payroll Amount <i>divided by</i> the (Total OT Pay Amount + Total Regular Pay Amount + Total Holiday Pay Amount)
OT Hour Percentage	Total OT Payroll Hours <i>divided by</i> the (Total OT Hours + Total Regular Hours + Total Holiday Hours)

Key Terms as defined in the Payroll Dashboard	
Total Payroll	Total Paid Hours for a defined period
Payroll for Current Week	Total Payroll Amount for a defined period
Payroll for Prior Week	Total Payroll Amount for previous week
Payroll Category	Describes the type of Payroll: Visit, In-Service
Holiday / OT Payroll/Hours	Worked/Paid Hours outside of Regular Hours
Regular Hours	Paid Hours excluding OT/Holiday; paid at a regular rate

Summary Widget in the Payroll Dashboard

At the top, the summary widget of the Payroll Dashboard shows a weekly payroll trend for the past 6 months by Office. This line graph shows a comparison between offices. Hovering over any part of the coordinates in the graph displays a pop-out window indicating information for that precise point.

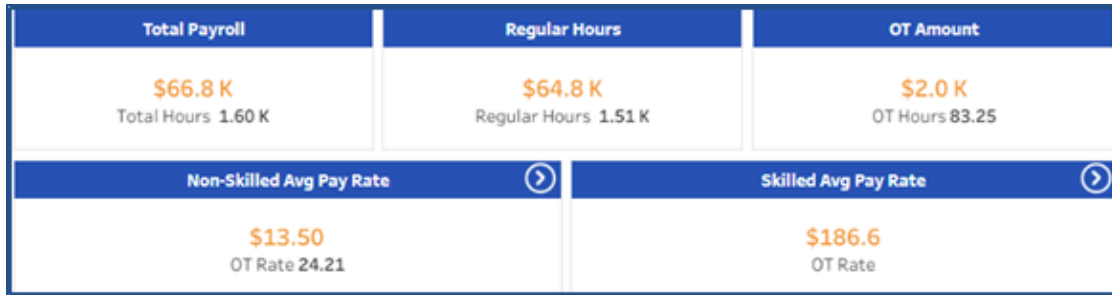
Right underneath, to the left, the line graph indicates the weekly percentage of the Overtime Total Payroll Amount and Overtime Hours for the past quarter. The stack graph to the right, provides a summary of Current Week Payroll Amount versus Previous Payroll Week Amount for the past quarter. Clicking on any segment of these graphs provides a summary of the selected point.



Payroll Dashboard – Summary Widgets

Indicator Widgets in the Payroll Dashboard

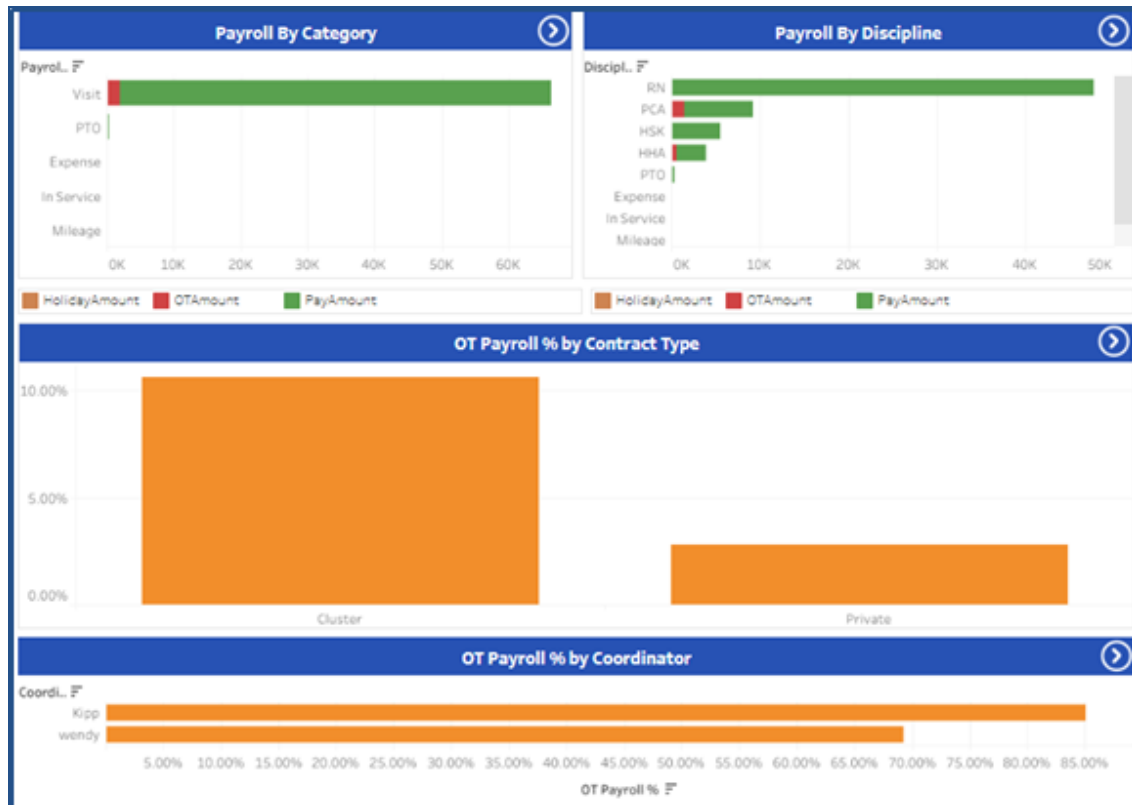
In the Payroll Dashboard, the indicator numbers correspond to the selected **Office** and **Batch Date**. In this dashboard, the *Average Pay Rate (Non-Skilled and Skilled)* indicators are drillable.



Payroll Dashboard – Indicator Widgets

Graph Widgets in the Payroll Dashboard

The four graph widgets at the bottom illustrate trends for *Payroll by Category*, *Payroll by Discipline*, *Overtime Payroll Percentage by Contract Type*, and the *Overtime Payroll Percentage by Coordinator*. Clicking on any segment of these graphs provides a summary of selected point. All graphs in this section are drillable.



Payroll Dashboard – Graph Widgets

Caregiver Dashboard

The **Caregiver Dashboard** captures data such as *Total Number of Active Caregivers*, *Non-Compliant Caregivers*, *Number of Active Applicants* as well as measures of Tenure, Hires, and Terminations, among other figures. This section covers the Caregiver Dashboard in its entirety from key terms and formulas to descriptions and functionality of each widget section.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



Sample Caregiver Dashboard

Caregiver Dashboard – KPIs, Formulas, and Key Terms

The following tables describe key terms, indicator definitions, and formulas used in context with the Caregiver Dashboard. Empty fields are not yet available.

KPIs as defined in the Caregiver Dashboard:	
Total Active Caregivers	Total number of Active Caregivers Percentage of Caregiver YTD turnover
Caregivers with No Visits	Total number of Caregivers with no scheduled visits ever.
Caregivers with No Visits (Last 30 Days)	Total number of Caregivers with no confirmed visits in the last 30 days (excluding Caregivers with No Visits scheduled ever).
Non-Compliant Caregivers	Total number of Non-Compliant Caregiver Percentage of Non-Compliance Rate
Average Caregiver Tenure in Months	Average time (in months) each current Active Caregiver has been employed with the Agency
Average Months from Application to Hire	Average time (in months) from Application to Hire Date (process)
Average Months from Hire to Visit	Average time (in months) from Hire to First Visit Date for current employees (excluding Applicants)
Last 30 Days	Total number of Hired Caregivers (in the last 30 days) Total number of Terminated Caregivers (in the last 30 days)
Weekly Hours per Caregiver	Total number of Hours work
Total Active Applicants	Total number of Applicants Percentage rate of Rejections

Formulas used to calculate the various widgets in Caregiver Dashboard:	
Weekly Hours per Caregiver	Average of total weekly hours divided by number of Caregivers (per week)

Key Terms as defined in the Caregiver Dashboard	
Active Caregiver	Caregiver (Employee) with an Active status in the system
Active Applicant	An individual (Applicant) being considered for employment; Active status in the system.
Non-Compliant Active Caregiver	An Active Caregiver missing or out of compliance in the system. For example, missing employment information or training credentials.

Indicator Widgets in the Caregiver Dashboard

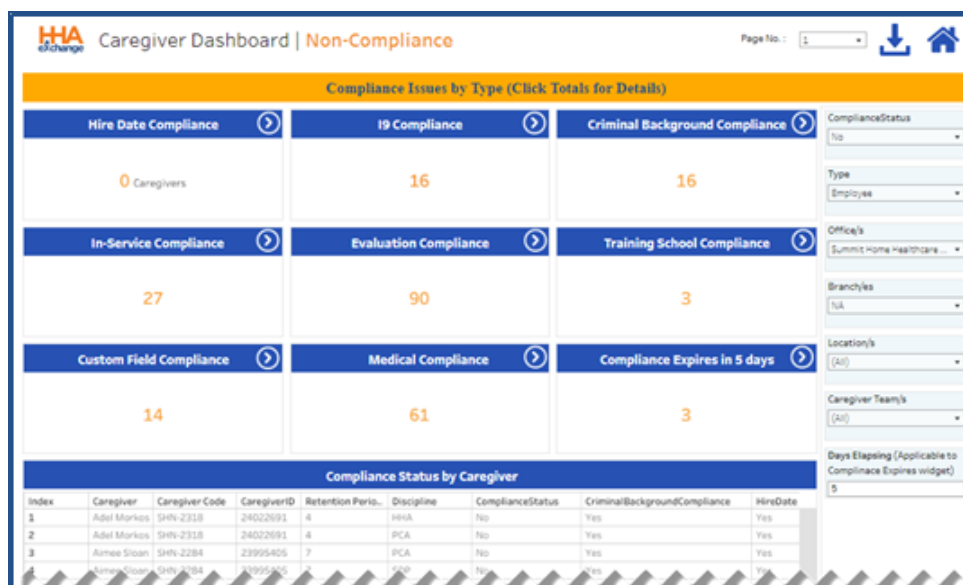
Several indicator widgets are available in the Caregiver Dashboard to include the *Total Active Caregivers*, *Caregivers With No Visits*, *Non-Compliant Active Caregivers*, *Caregiver Tenure*, *Average Months from Application to Hire*, *Average Months from Hire to First Visit*, *Last 30 Days*, *Weekly Hours per Caregiver*, and *Total Active Applicants* (per day). Some of these widgets are drillable, as indicated by the icon.



Caregiver Dashboard – Indicator Widgets

Non-Compliant Active Caregivers Widget

The *Non-Compliant Active Caregivers* indicator widget has a built-in dashboard (as seen in the image below) that is accessed by clicking on the key indicator number on the main widget. These key indicators are comprised of the various Compliance issues showing the number of Non-Compliant Caregivers per category (issues by type).



Non-Compliant Active Caregivers

The grid below the key indicator widgets offers a summary providing the Compliance Status details per Caregiver to include **Name, Code, Caregiver ID, Retention, Discipline, Compliance Status, Criminal Background Compliance, and Hire Date.**

Clicking on a key indicator widget in this window opens another window providing specific details. The image below illustrates details for **Medical Compliance** to include *Caregiver Name, Caregiver ID, Caregiver Code, Discipline, Rule Name, and Rule Description.*



Index	Caregiver	Caregiver ID	Caregiver Code	Discipline	Rule Name	Rule Description
1				HHA	Annual Health Assessment	Annual Health Assessment is overdue.
2				HHA	Drug Screen	Drug Screen is overdue.
3				HHA	Flu Vaccine	Flu Vaccine is overdue.
4				HHA	HEPATITUS B	HEPATITUS B is overdue.
5				PCA	Annual Health Assessment	Annual Health Assessment is overdue.
6				PCA	Flu Vaccine	Flu Vaccine is overdue.
7				PCA	HEPATITUS B	HEPATITUS B is overdue.
8				CDMP	Drug Screen	Drug Screen is overdue.
9				HHA	Drug Screen	Drug Screen is overdue.

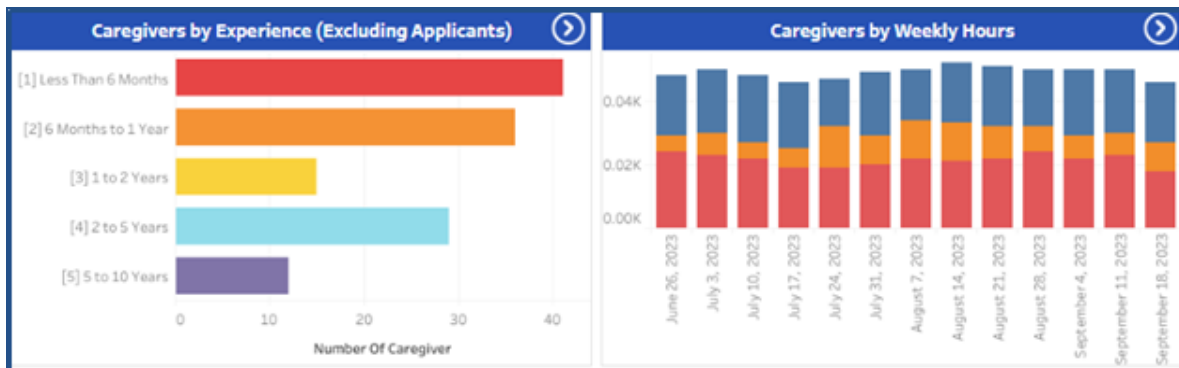
Medical Compliance Details Window

Note: Functionality is the same throughout this widget.

Graph Widgets in the Caregiver Dashboard

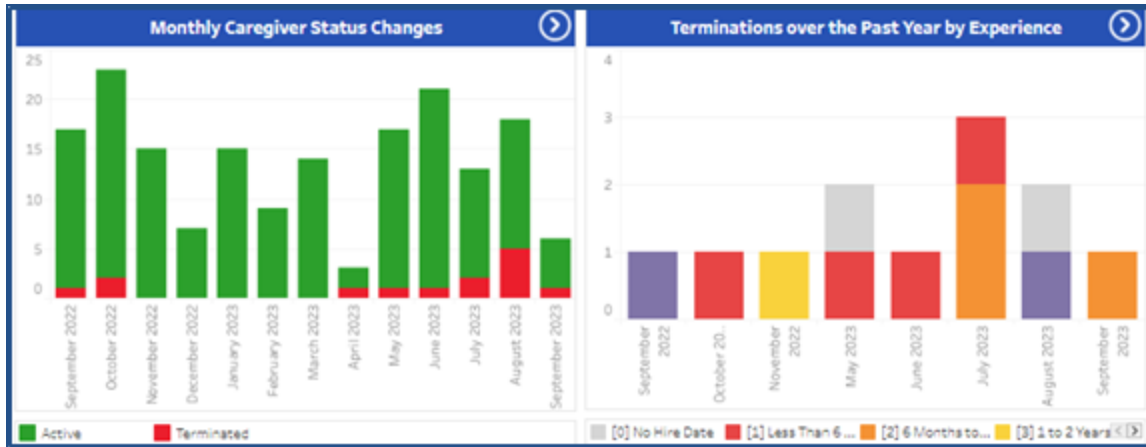
The Caregiver Dashboard is mostly composed of graph widgets illustrating various visual trends. Most of these widgets are drillable to obtain specific details. Each section is described below from top to bottom (in order of appearance).

The first set of graph widgets provide information on Caregiver Experience, not including those in *Applicant* status. The bar graph on the left indicates the number of Active Caregivers and their experience level with the Agency. The stack chart to the right provides a breakdown for the number of Caregivers by Total Weekly Hours worked over the past 12 weeks.



Caregiver Dashboard – Caregiver by Experience

The second set of graph widgets are stack graphs providing Caregiver Activity and Turnover. The graph to the left demonstrates Active Caregivers (with at least one visit during respective month) for the past year and by experience level with the Agency. The stack graph to the right provides a trend of Terminated Caregivers per month for the past 12 months by experience level with the Agency.



Caregiver Dashboard – Caregiver Status Changes and Terminations

The following stack graphs feature yearly trends in Applicants and New Hires per month. The graph to the left demonstrates the number of New Hires monthly by Status for the past 12 months. The graph to the right offers a breakdown per month of the number of Applicants by Status for the last 6 months.



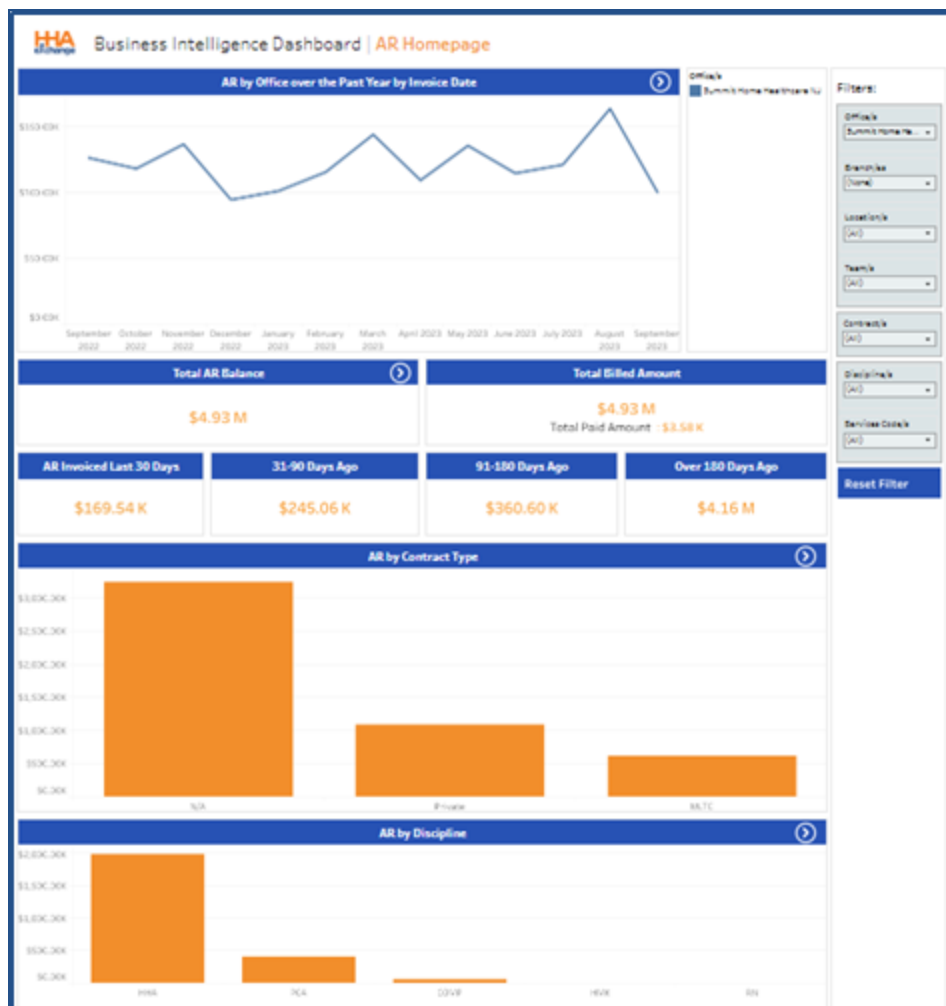
Caregiver Dashboard – Applicants and New Hires

AR Dashboard

Tip: Press the **Ctrl-F** keys to search this topic.

The **Accounts Receivable (AR) Report Dashboard** captures data such as Billed Amounts, Paid Amounts, and the aging of invoice records, among other figures. This dashboard provides a centralized view of information, alleviating the process of having to run multiple AR reports. This section covers the AR Dashboard in its entirety from key terms and formulas to descriptions and functionality of each widget section.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



Sample AR Dashboard

AR Dashboard – KPIs, Formulas, and Key Terms

The following tables describe key terms, indicator definitions, and formulas used in context with the AR Dashboard.

KPIs as defined in the AR Dashboard:	
Total AR Balance	Total Accounts Receivable balance for selected filters
Total Billed Amount	Total Billed Amount for selected filters Total Paid Amount for selected filters
AR Invoiced Last 30 Days	Total AR balance from Invoice Dates within the last 30 days for selected filters
31-90 Days	Total AR balance from Invoice Dates 31 to 90 days past for selected filters
91-180 Days	Total AR balance from Invoice Dates 91 to 180 days past for selected filters
Over 180 Days	Total AR balance from Invoice Dates 180 days past for selected filters

Key Terms as defined in the AR Dashboard	
AR Aging Range	Total number of days from invoice date Difference between the Invoice Date and Current Date

Indicator Widgets in the AR Dashboard

There are several indicator widgets available in the AR Dashboard including the *Total AR Balance*, *Total Billed Amount*, as well as another four widgets that indicate invoice aging figures such as *AR Invoiced Last 30 Days*, *31-90 Days Ago*, *91-180 Days Ago*, and *Over 180 Days Ago*.



AR Dashboard – Indicator Widgets

Graph Widgets in the AR Dashboard

The AR Dashboard graph widgets illustrate various visual trends. All graph widgets in this dashboard are drillable to obtain specific details. Each section is described below from top to bottom (in order of appearance).

The first graph widget, appearing before the indicator widgets, provides a visual of AR per Office over the last 12 months by Invoice Date. Clicking on any segment of these graphs provides a summary of a selected point.



AR by Office – Graph Widget

The following column graphs feature the Total AR Amounts by Contract Type (top) and AR by Discipline (bottom).



Total AR Amount – by Contract Type and Discipline

Care Insights Dashboard

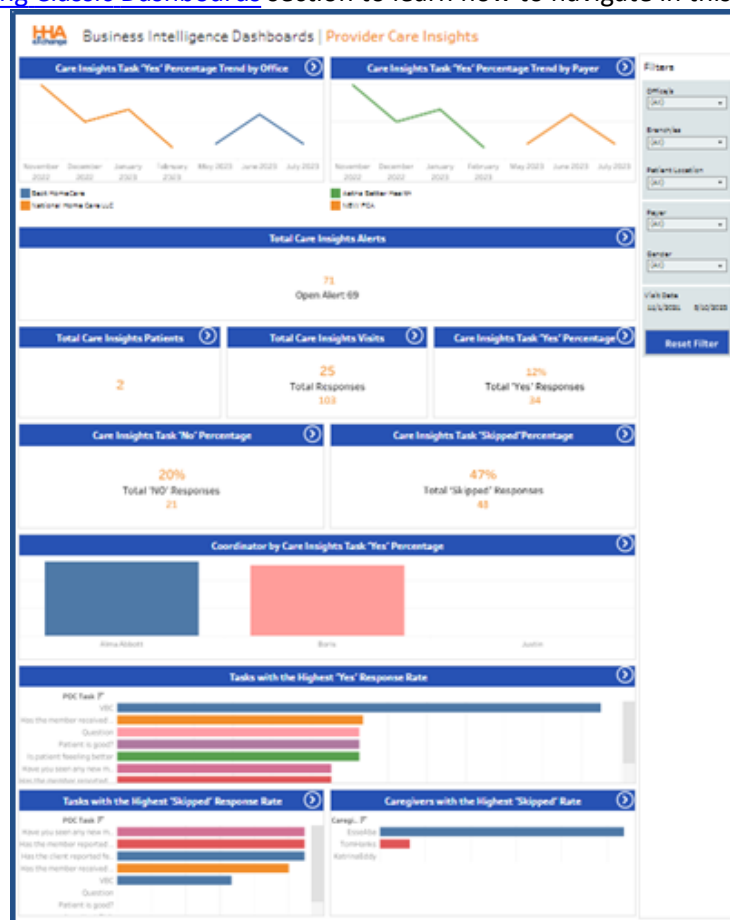
DISCLAIMER

This dashboard is only visible to Agencies using the Care Insights feature. Please contact [HHAX Client Support Portal](#) for details, setup, and guidance.

The **Care Insights Dashboard** captures data such as the number of *Yes*, *No*, and *Skip Responses*, *Total Care Insights Patients*, and *Total Care Insights Visits*. The Care Insights Dashboard includes indicator and graph widgets providing a visual aid and real-time figures including response percentages and trends by Office, Payers, Coordinators, Caregivers, and duties.

This section covers the Care Insights Dashboard in its entirety providing descriptions and functionality of each widget section. All widgets on this dashboard are drillable, providing details when clicking on precise points.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



Care Insights Dashboard

Care Insights Dashboard - KPIs

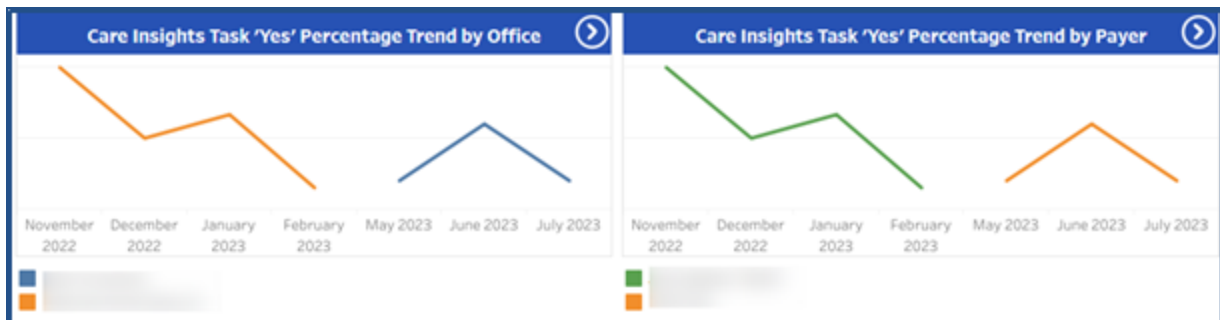
The following table describes KPIs used in context with the Care Insights Dashboard.

KPIs as defined in the Care Insights Dashboard:	
Total Care Insights Patients	Total number of Patients with Care Insights tasks and other filters
Total Care Insights Visits	Total number of Visits with Care Insights tasks Total Care Insights Responses (<i>Yes, No, or Skipped</i>).
Care Insights Task ‘Yes’ Percentage	Total number of Care Insights Tasks with a Yes response divided by the total number of Care Insights Tasks (including 'Skipped' responses). Total Yes Responses.
Care Insights Task ‘No’ Percentage	Total number of Care Insights Tasks with a No response divided by the total number of Care Insights Tasks (including 'Skipped' responses). Total No Responses.
Care Insights Task ‘Skipped’ Percentage	Total number of Care Insights Tasks with a Skipped response divided by the total number of Care Insights Tasks (including 'Skipped' responses). Total Skipped Responses

Summary Widgets in the Care Insights Dashboard

At the top, the summary widgets of the Care Insights Dashboard show a percentage trend by Provider Office and by Payer, per month for the past 12 months. The line graph on the left shows a comparison between offices. Hovering over any part of the coordinates in the graph displays a pop-out window indicating information for that precise point.

The line graph to the right, shows a comparison between Payers associated to the Provider. Hovering over any part of the coordinates in the graph displays a pop-out window indicating information for that precise point.



Care Insights Dashboard – Summary Widgets

Indicator Widgets in the Care Insights Dashboard

There are several indicator widgets available in the Care Insights Dashboard to include the *Total Care Insights Alerts*, *Total Care Insights Patients*, and *Total Care Insights Visits* as well as widgets indicating the percentage of responses (*Yes*, *No*, and *Skipped*). Click on any of the indicator widgets to obtain supporting details.



Care Insights Dashboard – Indicator Widgets

Graph Widgets in the Care Insights Dashboard

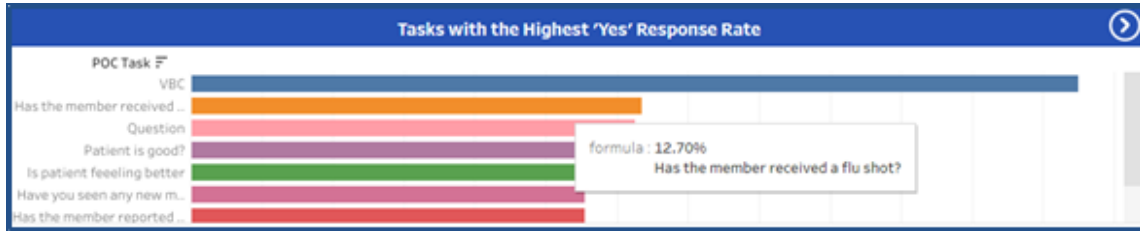
The Care Insights Dashboard graph widgets illustrate various visual trends. All graph widgets in this dashboard are drillable to view specific details. Each section is described below from top to bottom (in order of appearance).

The first column graph widget provides a visual of Coordinators with the highest percentage of *Yes* responses for Care Insight duties. Clicking on any segment of these graphs provides a summary of the selected point.



Care Insights Coordinators – Bar Graph Widget

The following (horizontal) bar graph features the Care Insights duties with the highest **Yes** response percentage (in ascending order). Use the scroll bar on the right of the graph to find a specific task.



Care Insights Duties with Highest Percentage of Yes Responses

The last graphs provide the Care Insight duties with the highest **Skipped** response rates (left) and the highest **Skipped** response rates by Caregivers (right). Use the scroll bar on the right of the graphs to find specific information.



Highest Percentages of Skipped Responses by Duty and by Caregiver

Case Acceptance Dashboard

Tip: Press the **Ctrl-F** keys to search this topic.

The **Case Acceptance Dashboard** captures case broadcast data such as the response numbers to issued broadcasts (by *Single Visits* or by *Master Week*), as well as number of *Agency Revocations*, *Caregiver Rejections*, *Broadcast Success Rate*, and *Broadcast Duration*, among other information.

This dashboard includes indicator and graph widgets providing a visual aid and real-time figures including response percentages and trends by Office, Branches, Location, Teams, and Broadcast Time.

This section covers the Case Acceptance Dashboard in its entirety providing descriptions and functionality of each widget section. All widgets on this dashboard are drillable, providing details when clicking on precise points.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



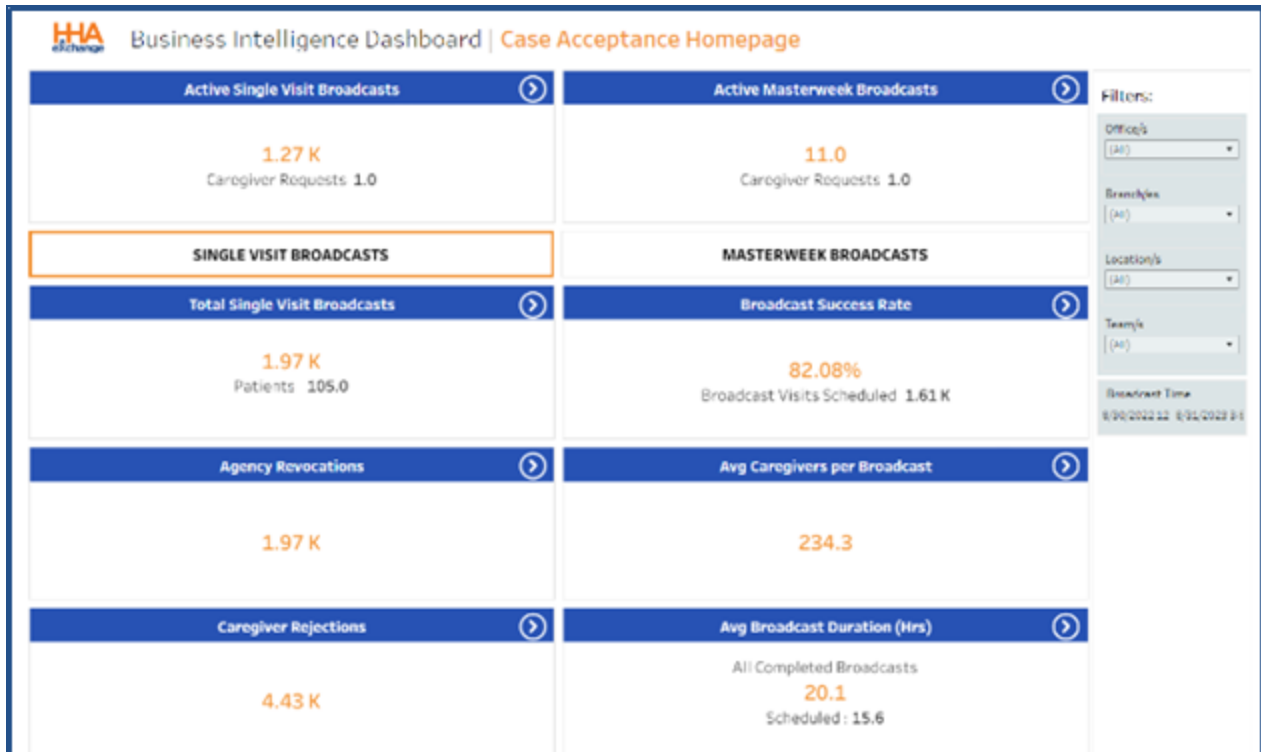
Sample Case Acceptance Dashboard

Indicator Widgets in the Case Acceptance Dashboard

There are several indicator widgets available in the Case Acceptance Dashboard to include the Active Single Visits Broadcast and Active Master Week Broadcasts. Select the **SINGLE VISIT BROADCASTS** button or **MASTERWEEK BROADCASTS** button to display the next set of indicator widgets for the selection.

In the image below, **SINGLE VISIT BROADCASTS** is selected. The widgets then indicate figures for single broadcasts in all other widgets. Click on any of the indicator widgets to obtain supporting details.

To view Master Week information, click on the **MASTERWEEK BROADCASTS** button.

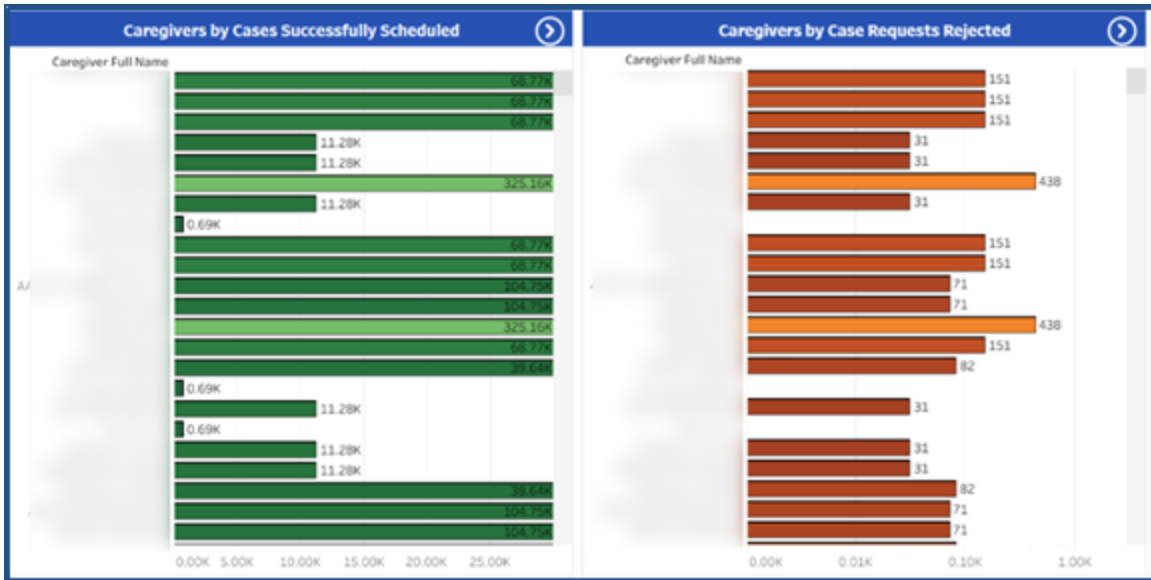


Case Acceptance Dashboard – Indicator Widgets

Graph Widgets in the Case Acceptance Dashboard

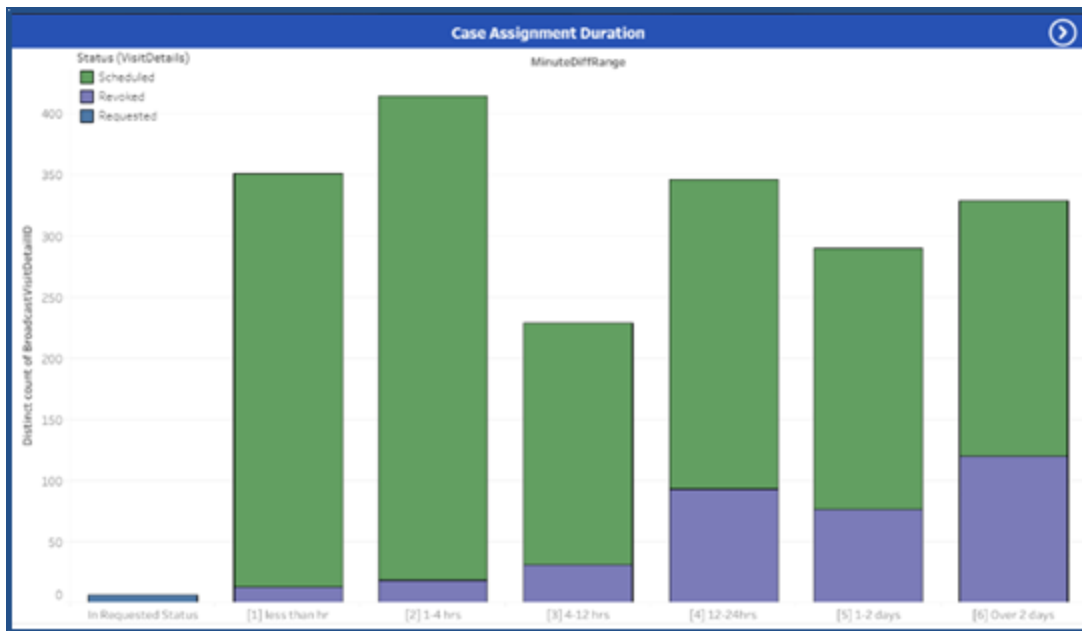
The Case Acceptance Dashboard graph widgets illustrate various visual trends. All graph widgets in this dashboard are drillable to view specific details. Each section is described below from top to bottom (in order of appearance).

The first bar graph widget provides a visual of *Caregivers by Cases Successfully Scheduled* (left) and *Caregivers by Case Requests Rejected* (right). Clicking on any segment of these graphs provides a summary of the selected point.



Case Acceptance Dashboard – Graph Widgets

The following graph widget (at the bottom) illustrates the Case Assignment Duration.



Case Acceptance Graph Widget – Case Assignment Duration

Outstanding Billing Dashboard

The **Outstanding Billing Dashboard** captures information for those amounts, hours, and visits yet to be billed as well as the exceptions and corresponding teams. Use the *Outstanding Amounts*, *Outstanding Hours/Units*, or *Outstanding Visits* filter options for corresponding results. As with other dashboards, the Outstanding Billing Dashboard is organized according to Coordinator teams.

This section covers the Outstanding Billing Dashboard in its entirety from key terms and formulas to descriptions and functionality of each widget section.

Refer to the [Navigating Classic Dashboards](#) section to learn how to navigate in this dashboard.



Sample Outstanding Billing Dashboard

Outstanding Billing Dashboard – KPIs, Formulas, and Key Terms

The following tables describe key terms, indicator definitions, and formulas used in context with the Outstanding Billing Dashboard.

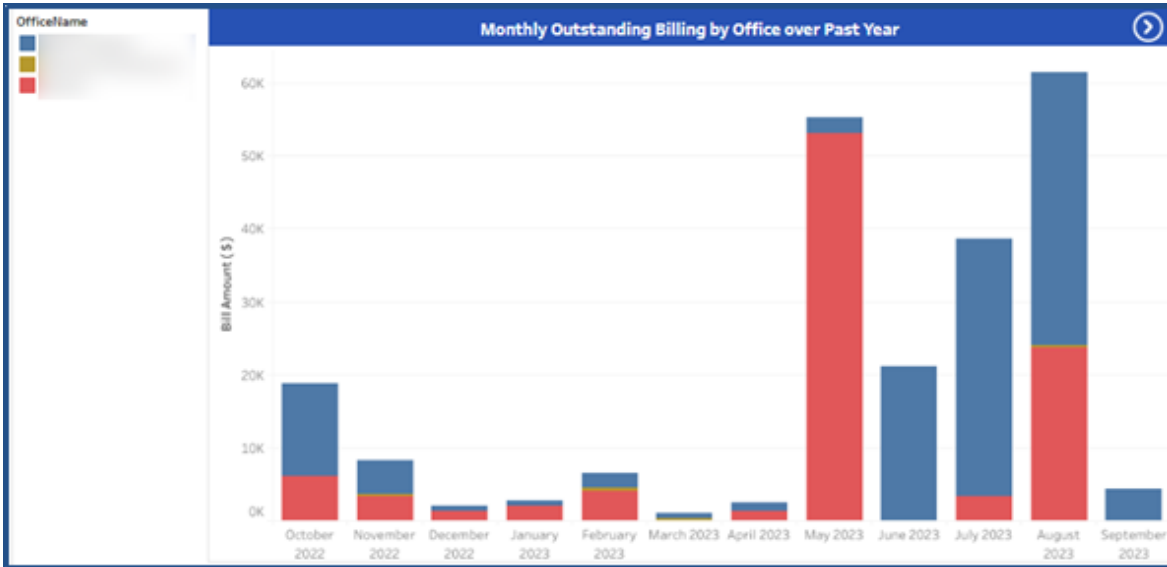
KPIs as defined in the Outstanding Billing Dashboards:	
Outstanding Visits	Outstanding Visits with a billing amount greater than \$0 for selected filters (excludes Missed Visits)
Missed Visits	Missed Visits for selected filters (excludes Missed Visits with no costs associated for selected filters)
Outstanding Hours/Units	Outstanding Hours on all Outstanding Visits and Missed Visits with costs associated for selected filters
Outstanding Amounts	Outstanding Billing Amount on all Outstanding Visits and Missed Visits with costs associated for selected filters

Formulas used to calculate the various widgets in the Outstanding Billing Dashboard:
This dashboard operates on direct data, derived from the application. No calculations are necessary.

Key Terms as defined in the Outstanding Billing Dashboard	
Contract Type	Type of Contract (Payer) paying a Billed Visit
Discipline	Type of billed service (ex: HHA, PCA, HCSS, etc.)
Discipline Type	Category to describe a Skilled or Non-Skilled Visit
Outstanding Amount	Total Amount Unbilled Visits and Missed Visits with associated costs
Outstanding Hours	Total Visit Hours (visit type = HOURLY, DAILY or VISIT) that are not billed within a particular date range
Outstanding Visits	Total number of Visits (visit type = HOURLY, DAILY or VISIT) that are not billed within a particular date range
Outstanding Unit	Unbilled Unit is a time increment; Units of service that are paid in increments (e.g., 1 unit=15 minutes)

Summary Widget in the Outstanding Billing Dashboard

At the top, the summary widget of the *Outstanding Billing Dashboard* shows a monthly trend for the past 12 months of Outstanding Billing Amount by Office. The stack graph provides a glimpse of the outstanding amounts per office, per month. Hovering over any coordinate (segment) of the graph displays a summary window indicating information for that precise point.



Outstanding Billing Dashboard – Summary Widget

Indicator Widgets in the Outstanding Billing Dashboard

In the Outstanding Billing Dashboard, the indicator numbers correspond to the selected **Value Type** filter (*Outstanding Amounts*, *Outstanding Hours/Units*, or *Outstanding Visits*). Click on any of these indicator widgets to obtain corresponding data behind the displayed value.



Outstanding Billing Dashboard – Indicator Widgets

Performance Widgets in the Outstanding Billing Dashboard

The bottom section of the Outstanding Billing Dashboard consists of performance widgets displaying data for the selected **Value Type**. For example, the following image illustrates data for Outstanding Hours/Units. The top widget displays *Outstanding Hours/Units by Contract Type* followed by the *Outstanding Hours/Units by Visit Duration* widget.



Outstanding Billing Dashboard – Performance Widgets

Navigating Dashboards

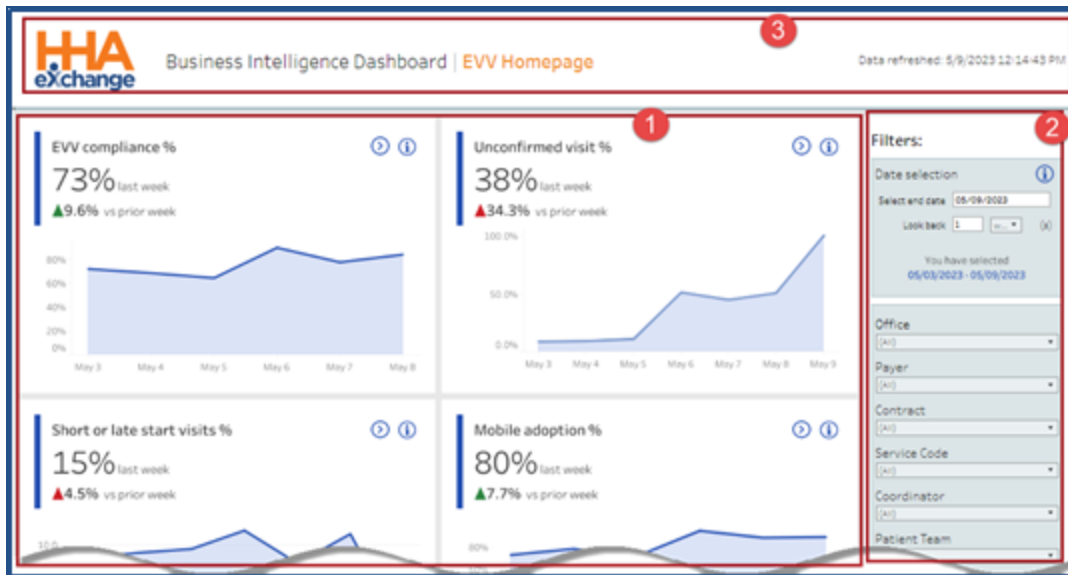
Note: This section details the navigation functionality that differs for some HHAX Dashboards (created and released after December 2022). For details and instructions for classic dashboards, refer to the [Navigating Classic Dashboards](#) section.

This navigation functionality applies to the following dashboards:

- EVV Management
- Billing
- Authorizations

The Dashboard Homepage

The following image illustrates the EVV Homepage dashboard, accessed from the main Dashboard homepage (used to demonstrate the navigation in the updated platform). This dashboard is comprised of *cards* (1), presenting high-level informational widgets or charts in the main panel. The *filters* (2) on the right side of the page are used to generate information on the charts. The top of the page indicates the Dashboard name and a date and time stamp showing the last data refresh (3).




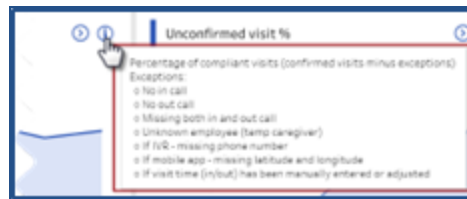
EVV Home Dashboard

Each card provides a set of functions allowing users to access specific information within the widget (on the top-right corner), as seen in the image below.




EVV Widget: Widget Functions

Click or hover over the Information icon () to view the tool tip providing details on the displayed figure and how the figure is calculated, as seen in the image below.



Widget Tooltip

Click on the Navigation icon () to access the details for this specific card. In this example, the *Non-Compliant Visits* dashboard opens. Similar to the home layout, this dashboard also contains cards with high-level KPIs (1), interactive widgets (2) allowing users to customize (*Change Dimension, Add Payers* to) the particular chart rather than changing all displayed charts and filters (3), used to generate specific data across all cards and widgets for this dashboard.



EVV Non-Compliant Dashboard


Hover over any graph or chart to see calculations for a specific component on a tool tip pop-up, as seen in the following image. In this example, the *Timesheet Received* topic in this performance graph shows the calculations for the exceptions in the *Reasons for Non-Complaint Visits* widget.



Tool Tip: Specific Calculations

Click on the [View Data](#) magnifying glass icon () to view source data for the dashboard. Refer to the View Data section for more details.

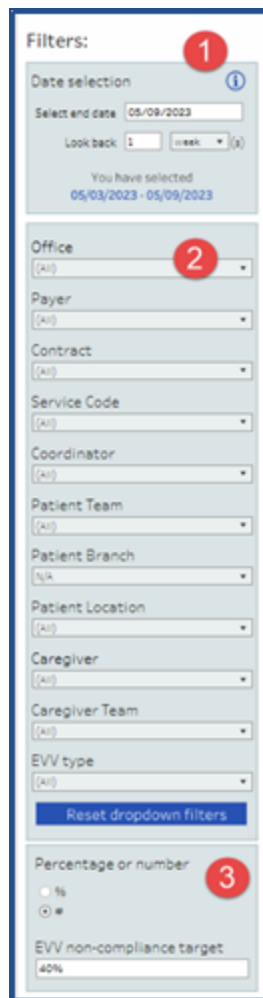
The filter icon () to the right of the *View Data* icon, is used to hide the filter pane, allowing for more screen space. To display the filters, click on the three lines icon (), to the right of the *View data* icon to revert.

Click on the home icon () at the top-right of the page to return to the selected Dashboard Homepage.

Filters

The filter pane, on the right side of the screen, is used to select criteria and generate specific data to display on the cards and widgets. The filter pane is comprised of three sections to include the *Date/Date Range* (1), *Data Selection* (2), and *Data Display* (3) preferences.

Filter selections vary by dashboard, depending on the information. For example, a **Date Type** filter is available in the Billing Dashboard to select if to view data by *Invoice* or *Visit* date. Refer to a specific Dashboard for further details.



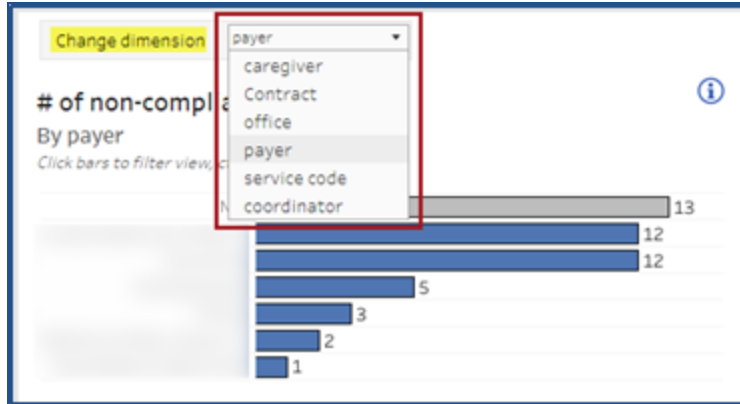
The screenshot shows a vertical filter pane titled "Filters:". It is divided into three main sections:

- Section 1 (Date selection):** Includes a "Select end date" field with the value "05/09/2023", a "Lookback" field with the value "1" and a "week" dropdown, and a summary line: "You have selected 05/03/2023 - 05/09/2023".
- Section 2 (Data Selection):** A list of dropdown menus for: Office, Payer, Contract, Service Code, Coordinator, Patient Team, Patient Branch, Patient Location, Caregiver, Caregiver Team, and EVV type. A "Reset dropdown filters" button is located below these menus.
- Section 3 (Data Display):** Includes radio buttons for "Percentage or number" (with "Percentage" selected) and a text input field for "EVV non-compliance target" with the value "40%".

Dashboard Filters

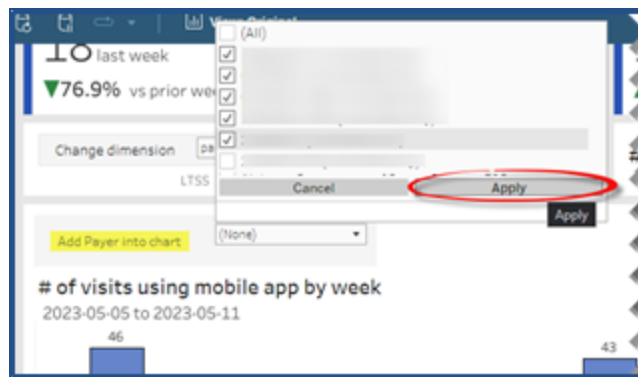
Dimension Fields

Some widgets have a **Change Dimension** dropdown field used to select a particular data set (such as by *Payer*, *Caregiver*, or *Contract*) to generate results for that particular card. In the example below, *Payer* is selected in the **# of Non-Compliant Visits** widget. The results in this widget are particular to *Payers*.



Dimension Dropdown Field

Other Dimension fields may be available to add specific Contracts or Payers to generate results. The image below illustrates a selection of *Payers* using the **Add Payer Into Chart** dimension field, to apply to the **# of Visits Using Mobile App by Week** widget.

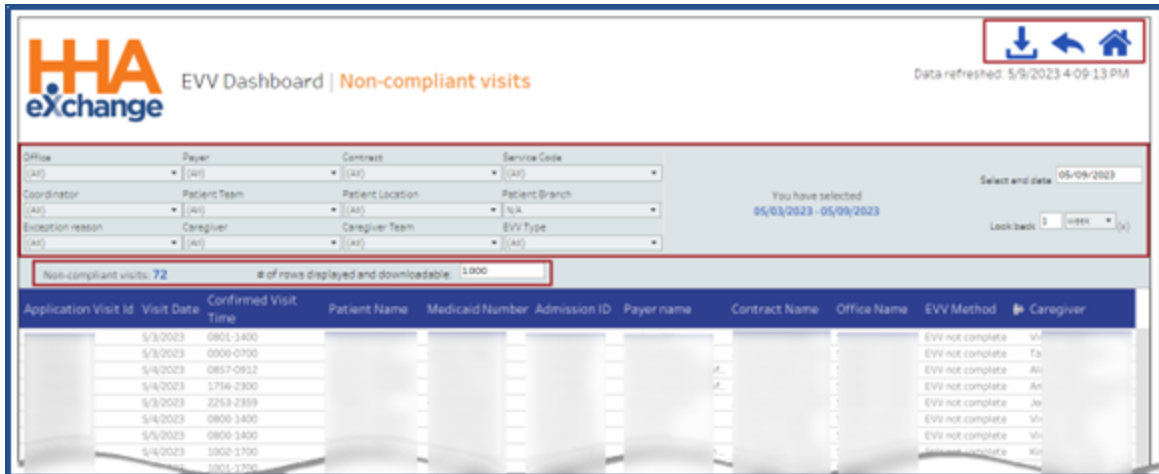


Add Payer Dimension Field

View Data

When clicking on the *View Data* magnifying glass icon, the system generates the source data in report format, as seen in the following image.




Selection filters are available to modify the information displayed. Below the filters, the results indicate the total number of **Non-Compliant Visits** (in this example), and a **# of rows displayed and downloadable** text box is available for users to adjust, as preferred; the default value is set to 1000.



View Data Example

Note: Maximum download limit is 500,000 rows.

Various options are available at the top-right section of the page, as seen in the image above.

- Click the **Download** icon () to export the displayed data in CSV or Excel format.
- To return to the Dashboard, click on the return icon () (back arrow).
- To return to the main dashboard, click on the home icon () next to the return icon.

Navigating Classic Dashboards

Dashboards created and released *before* December 2022 are considered Classic and navigation is slightly different than the newer dashboards (as described in the [Navigating Dashboards](#) section). The Classic Dashboard navigation is described in this section.

The Classic navigation functionality applies to the following dashboards:

- Caregiver
- Case Acceptance
- AR
- Payroll
- Outstanding Billing

The Dashboard Homepage

The following image illustrates the Caregiver Homepage dashboard, accessed from the main Dashboard homepage (used to demonstrate the navigation in the classic dashboard platform). This dashboard is comprised of *KPI widgets* (1), presenting high-level informational figures in the main panel. To the bottom of the KPIs are the *chart widgets* (2) illustrating data by way of chart formats (bar, line, pie, etc.) The *filters* (3) on the right side of the page are used to generate information on all widgets across the dashboard.



Classic Dashboard Homepage

Widget Functionality

To **drill down** is to move deeper into data, from high-level information to more detailed, focused information—in other words, to move downward through a data hierarchy. The following steps illustrate the process of drilling down for further information.

A Navigation (forward arrow) icon, on the right-top corner of a widget header indicates that further information is available behind the displayed data. Users can drill down by clicking on segments within the widget to access specifics. Note that not all widgets are drillable.



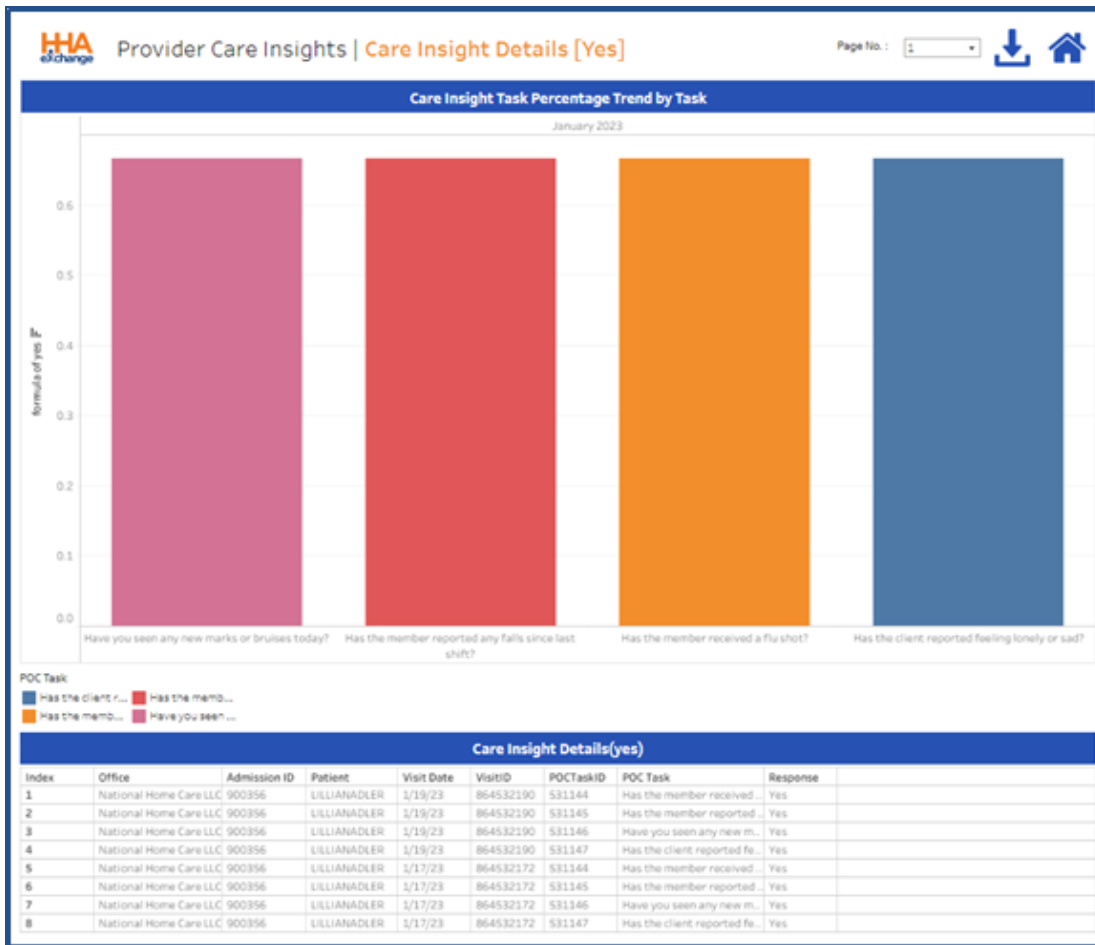
Drillable Widget

The following image illustrates an example of a drillable widget. To view specifics, click on any segment or point of interest of a chart within a widget. Note that tool tips populate while hovering over points in the chart to indicate specifics, as seen in the image below.



Click to Drill

A page opens showing the specifics for the selected point. In this example, there are two sections called “sheets”. The top sheet of the page shows a visual of the information while the bottom includes actual data for the visual.



Detailed Information

Hover over any portion of a segment within the drilled information to view details and/or the description, as shown in the next two images.

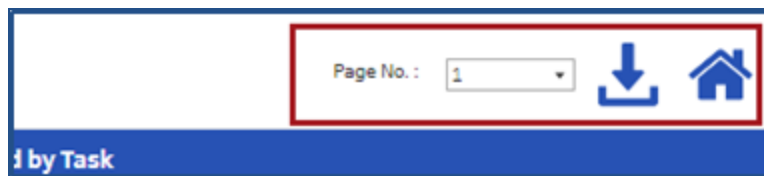


Detail Bar Graph


Care Insight Details(yes)									
Index	Office	Admission ID	Patient	Visit Date	VisitID	POCTaskID	POC Task	Response	
1	National Home Care LLC	900356	LILLIANADLER	1/19/23	864532190	531144	Has the member received...	Yes	
2	National Home Care LLC	900356	LILLIANADLER	1/19/23	864532190	531145	Has the member reported...	Yes	
3	National Home Care LLC	900356	LILLIANADLER	1/19/23	864532190	531146	Have you seen any new m...	Yes	
4	National Home Care LLC	900356	LILLIANADLER	1/19/23	864532190	531147	Has the member reported fo...	Yes	
5	National Home Care LLC	900356	LILLIANADLER	1/17/23	864532172	531144	Has the member reported fo...	Yes	
6	National Home Care LLC	900356	LILLIANADLER	1/17/23	864532172	531145	Has the member reported fo...	Yes	

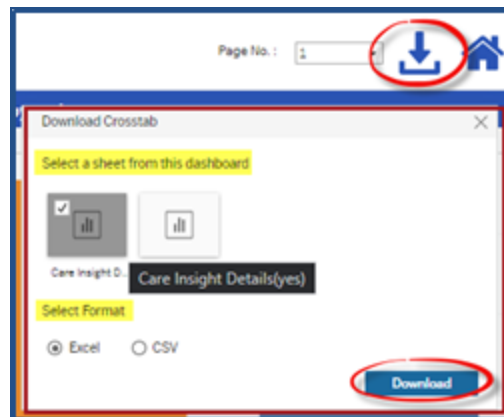
Detailed Report

On the top far-right section of the page, there are several options to include page navigation (if multiple pages), a download option, and a return to main dashboard option (home icon).




Details Page Options

Click on the **Download** icon () to open the *Download* window, as seen in the image below. Select the sheet to download (hover over each option for a description) and in which available format (*Excel* or *CSV*). Click the **Download** button and follow the prompts.



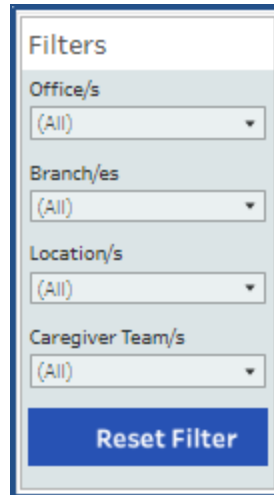
Download Crosstab Window

To return to the main dashboard, click on the home icon () next to the download icon.

Filters

Each dashboard has its own filter pane, located on the top-right, designed with criteria menus applicable to the dashboard. Like search filters, select values for the available filters to generate the information on the dashboard widgets.

To select values, click on the selection using the desired checkboxes and click on the **Apply** button. The information within all dashboard widgets updates dynamically according to the selected criteria. Use the **Reset Filter** button to clear selections. Filters are not required to generate results. Not selecting filters broadens the data displayed.



Dashboard Filter Pane on Classic Navigation