PointClickCare®

Home Health Care Customizing Your Dashboards and Home Page

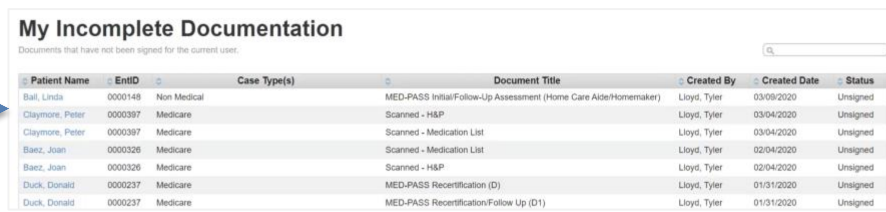
Overview

Dashboards give users insight into important information for managing workflows and tasks within their roles. Regularly using dashboards throughout their day, users can ensure priorities are attended to and required work is completed: clinicians can manage incomplete orders and unsigned documents; schedulers can identify unassigned appointments; billers can help resolve held appointments. (To view example dashboard setups per user responsibilities, see Sample Dashboard Setups.)

By default, Home Care opens to the Dashboard page, but you can configure the program to open to a specific page.

Card Widgets

Card widgets provide easy access to required tasks and information. Click on a card to access documents and information. For a complete list of available card widgets, see Available Dashboards Widgets.



My Incomplete Documentation

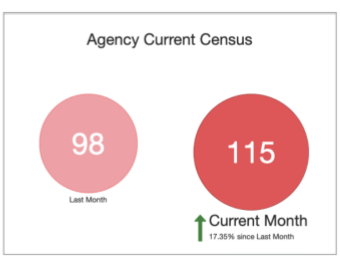
Documents that have not been signed for the current user.

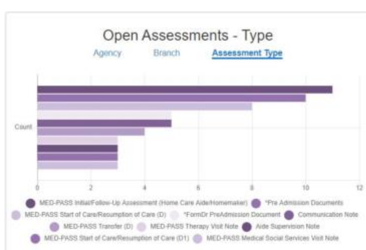
Patient Name	EntID	Case Type(s)	Document Title	Created By	Created Date	Status
Ball, Linda	0000148	Non Medical	MED-PASS Initial/Follow-Up Assessment (Home Care Aide/Homemaker)	Lloyd, Tyler	03/09/2020	Unsigned
Claymore, Peter	0000397	Medicare	Scanned - H&P	Lloyd, Tyler	03/04/2020	Unsigned
Claymore, Peter	0000397	Medicare	Scanned - Medication List	Lloyd, Tyler	03/04/2020	Unsigned
Baez, Joan	0000326	Medicare	Scanned - Medication List	Lloyd, Tyler	02/04/2020	Unsigned
Baez, Joan	0000326	Medicare	Scanned - H&P	Lloyd, Tyler	02/04/2020	Unsigned
Duck, Donald	0000237	Medicare	MED-PASS Recertification (D)	Lloyd, Tyler	01/31/2020	Unsigned
Duck, Donald	0000237	Medicare	MED-PASS Recertification/Follow Up (D1)	Lloyd, Tyler	01/31/2020	Unsigned

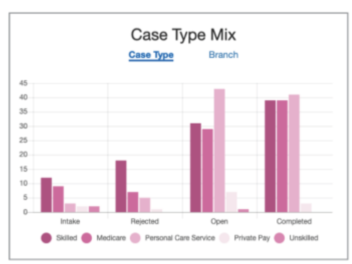
KPI Widgets

Users get immediate access to agency metrics with Key Performance Indicator (KPI) dashboard widgets. The program extracts real-time value from the data you collect and displays it in interactive widgets to give you a complete picture of your agency's performance. Hover over an item for more detail, click for a deeper view of a metric, or change the view category (Agency, Branch, Physician, etc.). For a complete list of available KPI widgets, see Available Dashboards Widgets.

Example widgets:







Configurable Landing Page

Set Home Care to open on the page you use most often. Do you spend your days intaking referrals? Set Intake as your landing page. Are you a biller and work the claim queues all day? Set your landing page to Billing. The default landing page is Dashboards

Procedure

1. Hover over your user name and select **User Settings**.
2. Choose your Default Landing Page and click **Save**. If you do not configure a landing page, Home Care automatically opens on the Dashboard page.

Dashboard Setup

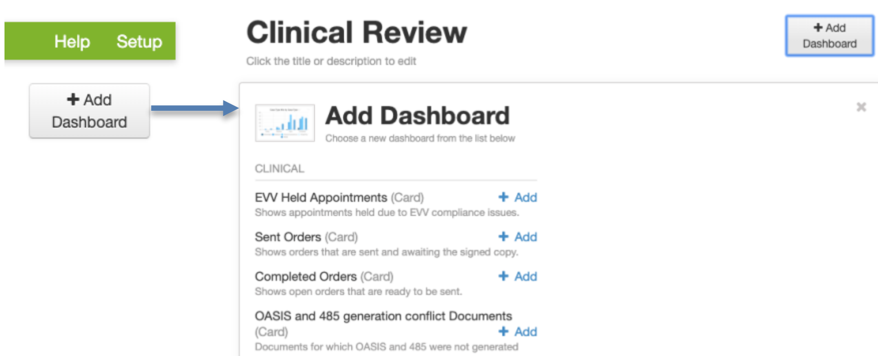
Whether you are an agency owner keeping tabs on key metrics, or an office worker managing order signatures, you can set up a dashboard to meet your needs. Simply select the widgets you want and create dashboard groups as needed to organize your information.

Add widgets to dashboards

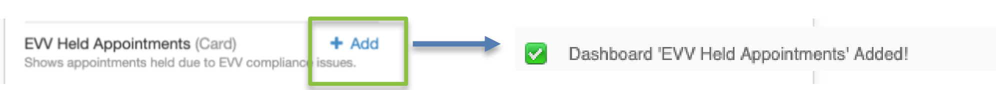
From the Dashboard page you can select the items you want on your dashboard and define default settings for each widget.

Procedure

1. From the Dashboard tab, click **+Add Dashboard** to access a list of available widgets for your role.

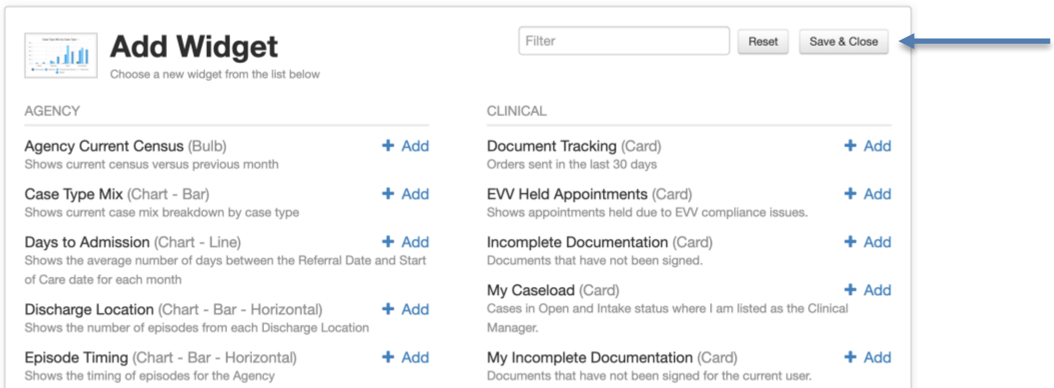


2. Click **+Add** to add a widget to your Dashboard page. A message in the upper right portion of your screen confirms the widget is added to your dashboard.



3. Continue to add widgets as necessary.

4. When you've finished adding widgets to your dashboard, click **Save and Close**.

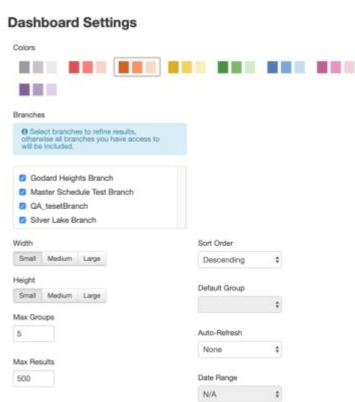


Configure dashboard widgets

Your system administrator sets up the default appearance of your widgets, but you also have the option to configure them to create a look and feel that works for you.

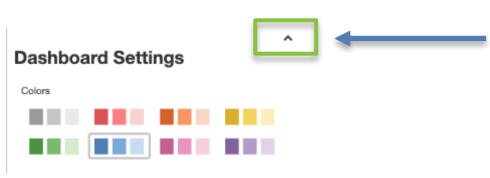
Procedure

1. On the Dashboard page, hover over the lower right corner of a widget and click the icon to view the Dashboard Settings.



2. Adjust the settings as necessary.

3. Click the ^ icon when your settings are complete.

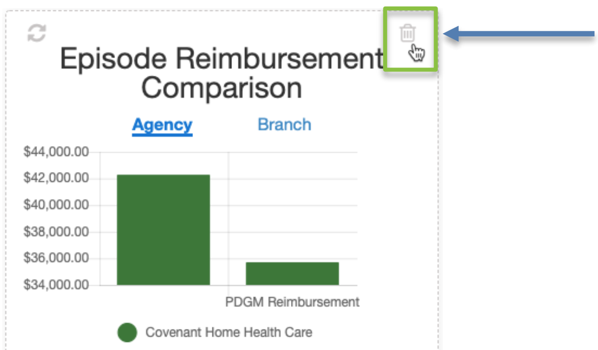


Delete dashboard widgets from a dashboard

At times it may be necessary to remove a widget from your dashboard.

Procedure

1. To delete a widget from your Dashboard page, hover over the upper right corner until a trashcan icon appears.



2. Click the trashcan icon.

Create new dashboard groups

Dashboard groups let you categorize your dashboards for easy access. For example, if you perform more than one job function, you could set up a group for each function.

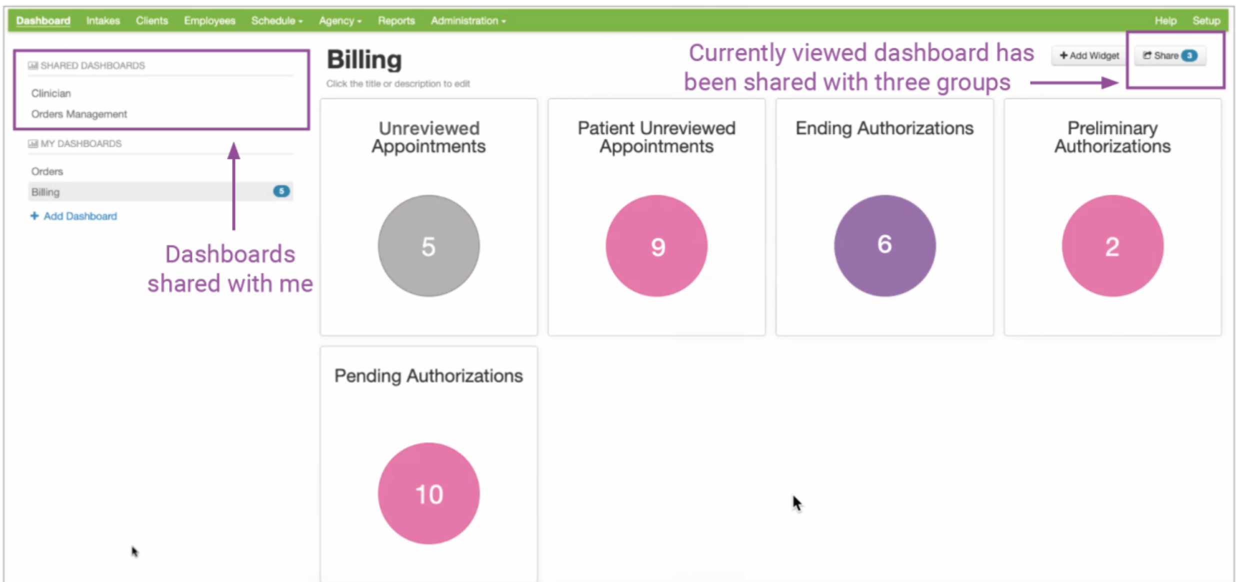
Procedure

1. From the Dashboard tab, click **+ Add Group**. By default, the group is named New Dashboard Group.

2. Hover over the title to view the  (pencil) icon. Click the icon to edit the title. Click outside the field when your changes are complete.

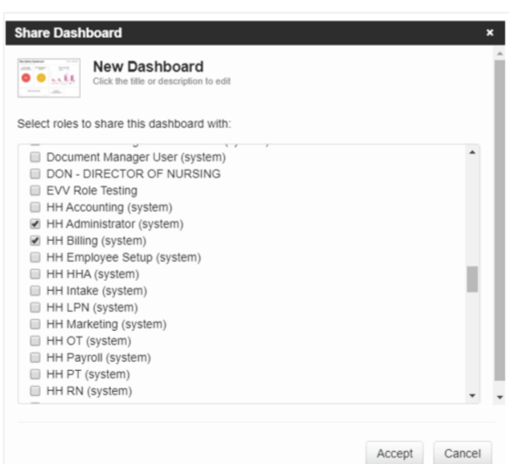
Shared Dashboards

Admin users can create and share default dashboards by role(s). End users in those roles will see the Shared Dashboards on their Dashboards page, in the SHARED DASHBOARDS section. Users cannot remove or edit the Shared Dashboards. (Information in the dashboards is limited based on user's branch(es) access and permissions.)



Sharing a Dashboard

1. With Admin privileges, create a dashboard. See Dashboard Setup.
2. Click **Share**.
3. Select user roles for the shared dashboard and click **Accept**.



Available Dashboards Widgets

Access to dashboard widgets is controlled through user-role setup. Contact your system administrator if you need access to dashboard widgets. Note: We add dashboards widgets often. Please monitor Home Care release notes for new dashboards you might find useful.

Card Widgets

Document tracking	Displays a list of Orders that have been sent to Forcura in the last 30 days
Employees With Incomplete Requirements	Displays Employees that do not have a Requirement that is set as required on their profile. Requirements are defined under Administration > Care Delivery > Requirements
Ending Authorizations	Displays active Authorizations where the end date is in the past or is within the next 14 days
EVV Held Appointments	Displays appointments with the status of Held due to EVV compliance issues
EVV Rejections - Caregiver	Displays EVV transactions that were rejected for issues with the Caregiver information provided
EVV Rejections - Patient	Displays EVV transactions that were rejected for issues with the Patient information provided
EVV Rejections - Visit	Displays EVV transactions that were rejected for issues with the Visit information provided
Incomplete Documentation	Displays all documents with the status of Unsigned. Does not include documents associated to case records where the Show Orders check box isn't selected
Missing Employee Rates	Displays employees that do not have rates defined for appointments they are assigned to
My Incomplete Orders	Displays orders with the status of Open for the user viewing the dashboard
OASIS and 485 generation conflict Documents	Displays Start of Care, Recertification and Resumption of Care charting documents that do not have a corresponding Plan of Care or OASIS created
Open Physician Orders Marked as Completed	Displays Orders with the status of Open, have been signed by the clinician and a signing Physician has been added

Out-of-Order Documents	Displays documents that have not been signed but other documents associated to earlier visits have been signed
Outstanding Eligibility Verification Transactions	Displays patients with an eligibility verification response that was denied, failed, pending, or had errors in the last 15 days. Only includes Payers with active coverage as well.
Patient Responsibility Adjustments Not Forwarded	Displays a list of patients that have a Patient Responsibility adjustment that has not been forwarded (moved) to another invoice
Patient Unreviewed Appointments	Displays a list of appointments with the status of Held or Open that are scheduled for the current day or earlier
Payments Unapplied	Displays any deposit that has over payments or credits (a cash balance) that have not been marked as applied
Pending Authorizations	Displays active Authorizations with the status of Pending and the start date is 14 days or more in the past
Pending QA Review	Displays Assessments with the status of Pending QA Review
Preliminary Authorizations	Displays active Authorizations with the status of Preliminary
QA Review Complete	Displays Assessments with the status of QA Complete
Sent Physician Orders	Displays Orders with the status of Sent
Unassigned Appointments	Displays appointments with the status of Open or Held and no Employee is assigned
Unauthorized Appointments	Displays all appointments that do not have an Authorization assigned to them
Unreviewed Exclusion Checks	Displays Employees that could not be matched to a profile in the OIG's database and the employee will need to be reviewed manually

KPI Widgets

Agency Current Census	Shows the census of the previous month compared to the current month.
Case Type Mix	Shows the number of number of cases by the type and status
Days to Admission	• Shows an average number of days for Patients between the Date of Referral (M0104 from OASIS) from the earliest Start of Care OASIS and the Start of Care date. • The earliest Start of Care OASIS is determined by the Date Assessment Completed date. • The OASIS must be reviewed or exported. • Patients are included in a month based on the Start of Care date.
Days to Bill - Final	• Shows the average number of days from the claim end date to the submitted date for all submitted claims in a given month. • The claim end date is used to determine what month to count the claim in. • The KPI displays Final claims from the 1st and 2nd 30-day billing periods separately. • Selecting a particular month will show the average days to bill for each branch in that month.
Days to Bill - RAP	• Shows the average number of days from the start of the 30-day billing period to the submitted date for all submitted claims in a given month. • The Billing period start date is used to determine what month to count the claim in. • The KPI displays RAP claims from the 1st and 2nd 30-day billing periods separately. • Selecting a particular month will show the average days to bill for each branch in that month.

Discharge Location	• Shows the discharge location of each patient prior to their Home Care service, question M1000 from the OASIS. • This includes Start of Care or Re-certification OASIS that are reviewed or exported and where question M0150 has option 1 selected. • Users can view details by the Agency and Branch.
Employee Turnover (%)	• Finds employees with a Status Date Change and their status is set to Terminated. • The turnover percentage is determined by comparing the total number of employees to the number of employees that were terminated in a given month.
Episode Reimbursement Comparison	• Totals the PPS reimbursement amount for all OASIS that are marked as exported or reviewed following the 2019.5 release. • Totals the PDGM reimbursement for both 30 day billing period amounts for all OASIS that are marked as exported or reviewed following the 2019.5 release. • KPI displays a bar for each of these totals to show the Agency their reimbursement under PPS and PDGM. • NOTE - This will be removed sometime in 2020 as PDGM is now in effect
Episode Timing	• Shows the timing of each episode based on the answer to OASIS question M0110 - Early, Late, Unknown or NA. • This includes Start of Care, Resumption of Care or Re-certification OASIS that are reviewed or exported and where question M0150 has option 1 selected. • Users can view details by the Agency and Branch.
Historical Census	• Patients that have a Start of Care date and at least one reviewed appointment are included in the census. • If a Patient has an End of Care date then they would not be included in the Census for future months.

Length of Stay	• Shows a count of episodes that are completed within 10 day ranges - 1-10, 11-20, 21-30, 31-40, 41-50 and 51-60. • The number of days for an episode is determined by the Certification period start date to the discharge date OR the certification period end date. • Episodes need to have an OASIS that is reviewed or exported and have option 1 selected on the M0150 question.
LUPA %	• Shows the number of submitted Final or LUPA claims that have less than 5 reviewed appointments. • The percentage is then determined by comparing the number of episodes that are LUPAs compared to the overall number of episodes for a given month. • NOTE - This will be removed some time in 2020 as the LUPA calculation has changed under PDGM.
Open Assessments - Days	• Shows the number of Assessments that have been created but not signed and the number of days since it was created. • The counts are grouped by how many days since the Assessments were created until "today" - 1, 2, 3, 4, 5, or 6 + days.
Open Assessments - Type	• Shows the number of assessments that have been created and not signed by each specific Assessment - Start of Care, Skilled Visit note, etc. • Clicking on a particular assessment will then show the number of those assessments open by each user who created the assessment.
Outstanding Orders	• Displays the count of Orders that currently have the status of Open or Sent. • Users can select either of the statuses and then view Open or Sent Orders by Branch and by Physician.

Payer Mix	• Shows the number of Patients that have Plans for each of the different Plan Types - Medicare, Medicaid, Workers compensation, Private Insurance, etc. • The Plans will be included if there is no coverage end date or if the coverage end date is in the future. • Users can select a particular plan type and see how patients are in each Branch for that plan type.
PDGM - LUPA %	• Shows the percentage of Final and LUPA PDGM claims that are submitted or paid and the number of service charges is less than the LUPA threshold. • The percentage is determined by comparing the number of claims that qualify as a LUPA to the overall number of claims submitted or paid in a given month. • Appointments associated to the service charges need to have the status of Reviewed. • The KPI displays LUPAs from the 1st and 2nd 30-day billing periods separately.
Questionable Encounters	• Shows a count of Episodes that have a reviewed or exported OASIS and the Primary Diagnosis is considered a Unacceptable Diagnosis by CMS under PDGM. • The OASIS also needs option 1 selected on the M0150 question. • NOTE - This will be removed in 2020 since the application will prevent users from submitting a claim with zero reimbursement
Referral Sources	• Shows the number of patients from each unique Referral Source in the selected date range.
Referral Sources - Admissions	• Shows the number of patients from each unique Referral Source that have a Start of Care date in the selected date range.
Referral Sources - Rejections	• Shows the number of patients from each unique Referral Source that have the case status of Rejected.

Sample Dashboard Setups

PointClickCare recommends checking dashboards DAILY.

Clinician

My Incomplete Orders

M Incomplete Documentation

QA Review Complete

Unassigned Appointments (for self-scheduling clinicians)

Case Manager

My Caseload

QA Reviewer

Pending QA Review

Biller

Preliminary Authorizations

Pending Authorizations

Ending Authorizations

Outstanding Eligibility Verification Transactions

Patient Unreviewed Appointments

Held EVV Appointments

Office Manager

Incomplete Documentation

Open Physician Orders Marked as Complete

Document Tracking (if using Document Tracking)

Sent Orders

Held EVV Appointments

Scheduler

Preliminary Authorizations

Pending Authorizations

Ending Authorizations

Unassigned Appointments

Patient Unreviewed Appointments

Clinical Director

Incomplete Documentation

Open Physician Orders Marked as Complete

Document Tracking (if using Document Tracking)

Sent Orders

Held EVV Appointments

My Incomplete Orders

My Incomplete Documentation

QA Review Complete

Pending QA Review

Administrator

Consider having all of the above dashboards arranged in groups so that you can monitor them frequently. In addition, include the following KPIs:

Agency Current Census

Historical Census

Outstanding Orders

Case Type Mix

Employee Turnover Percentage

Episode Reimbursement Comparison

Episode Timing

Discharge Location

Questionable Encounters

Episodes Completed

Executive Director

Agency Current Census

Historical Census

Outstanding Orders

Case Type Mix

Employee Turnover Percentage

Episode Reimbursement Comparison

Episode Timing

Discharge Location

Questionable Encounters

Episodes Completed