



Sandata

Get more right from the start

AZ/HI

Sandata BI

November 2022

SANDATA BI Overview

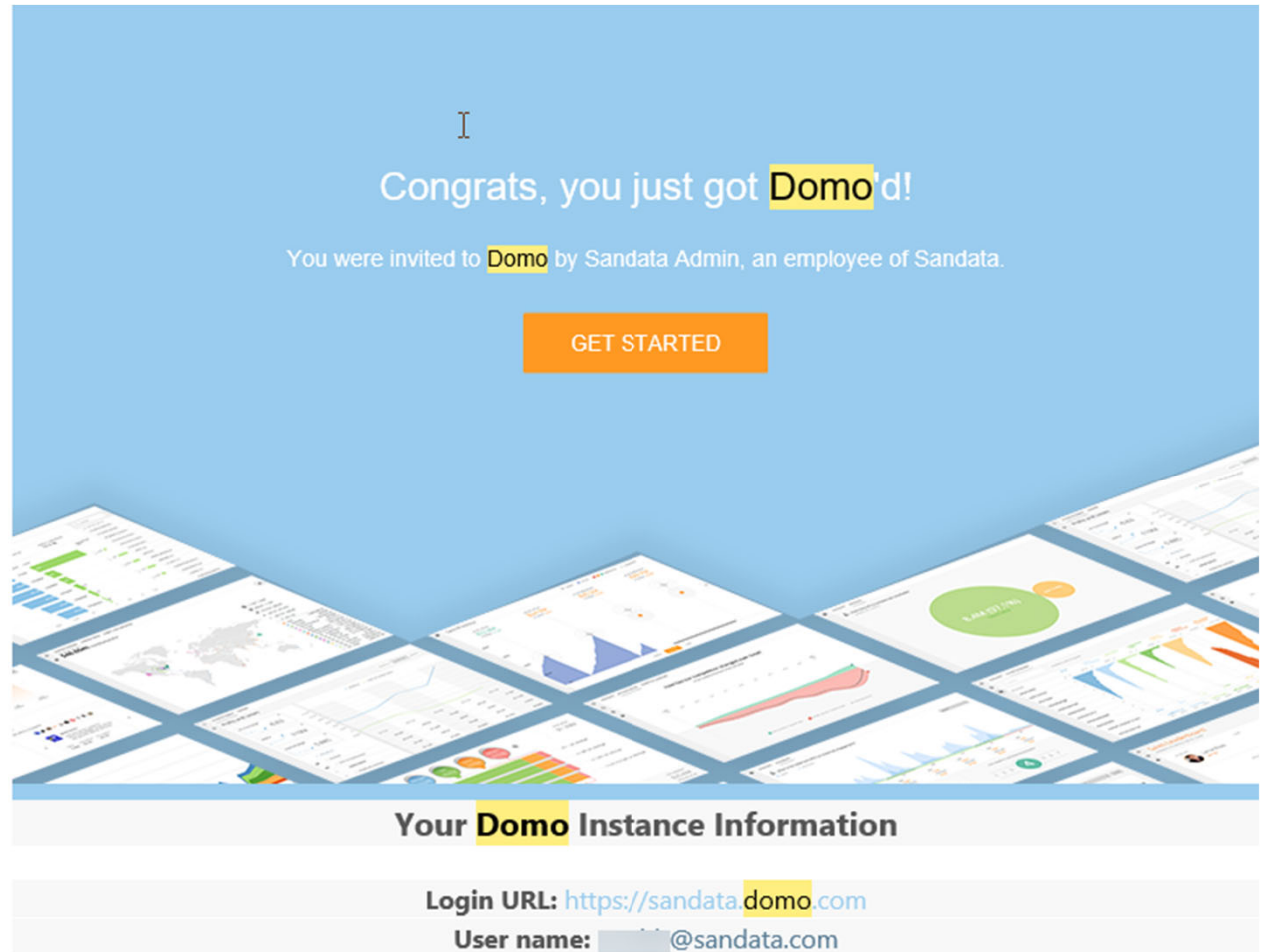
- ▶ DOMO Getting Started
 - Introduction – What is Sandata BI
 - Log in for the 1st time and changing or resetting passwords
 - Profile setup
 - Viewing Standard Dashboard's
 - Viewing Card Details in full screen mode
 - Applying additional filters & changing default date range
 - Card Features
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 - Report Scheduler
 - Sharing Cards

What is Sandata BI?

- Sandata BI is a cloud-base tool accessible through a browser, meant to deliver data driven insights into programs, services, client and workforce.
- Sandata's Business Intelligence (BI) tool allows a user to view information across payers, programs, services and agencies. As part of each implementation, a standard set of cards is provided by Sandata. AZ/HI MCO's will only see their specific data.
- The cards provided are broken into two dashboards:
 1. Clients & Employees – Includes cards with demographic information about providers, clients and employees
 2. Visit Information – The cards in this section provide insights on EVV utilization by the providers in the program. It includes information on the number, type and status of services provided, statistics on the method used to verify the visits (manual or automatic), exceptions, conflicting (overlapping) visits, to name a few.



Getting Started & Logging into DOMO



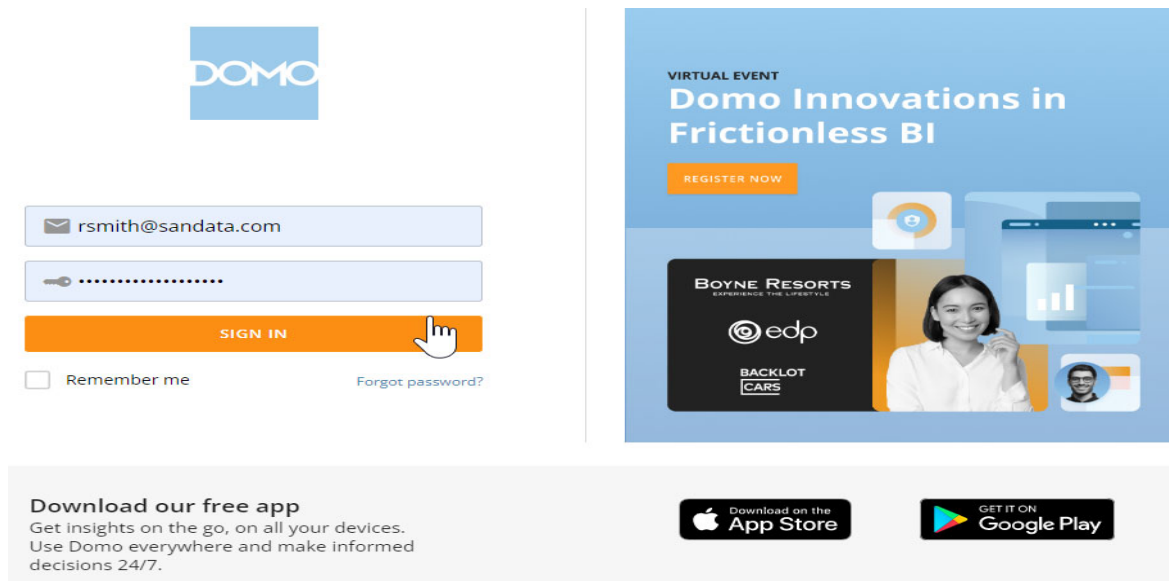
Getting Started – Logging into Sandata BI

Once your credentials have been provisioned, you will receive a welcome email with the subject line:

"Congrats! You've been Domo'd!".

Please make sure to look for this email in your spam and junk folders as well as your inbox.

The welcome email will include the URL that you will need to use to access Sandata's BI Tool and a link to set up your password. We recommend that you bookmark the URL <https://sandata.domo.com> for easy access in the future.

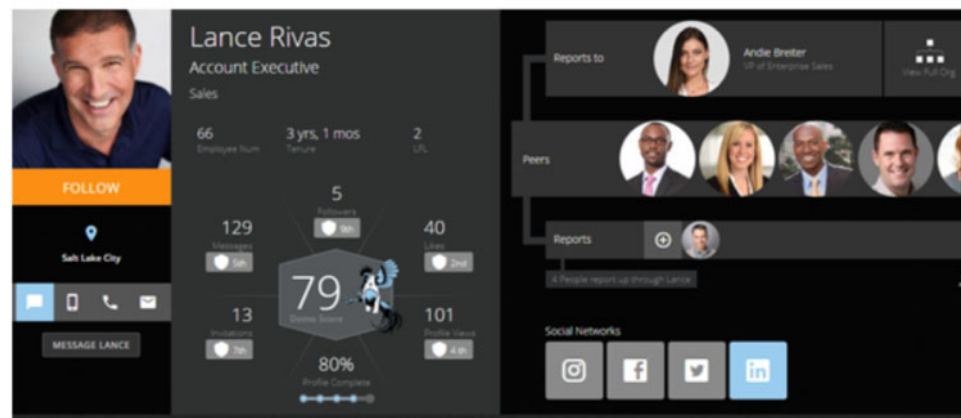


The image shows a login interface for Sandata BI. On the left, there is a login form with the Domo logo at the top. The form includes an email field with 'rsmith@sandata.com', a password field with masked characters, an orange 'SIGN IN' button with a hand cursor, a 'Remember me' checkbox, and a 'Forgot password?' link. To the right of the login form is a promotional banner for a 'VIRTUAL EVENT' titled 'Domo Innovations in Frictionless BI'. The banner features a 'REGISTER NOW' button, logos for 'BOYNE RESORTS', 'edp', and 'BACKLOT CARS', and a photo of a woman. At the bottom of the page, there is a section for downloading a free app, with text stating 'Get insights on the go, on all your devices. Use Domo everywhere and make informed decisions 24/7.' and buttons for the 'App Store' and 'Google Play'.

Setting Up User Profile

Click on the profile button located on the top right corner of the page.

- Click on My Profile
- Add as much information as you like , such as
 - Profile Picture
 - Mobile # will add options to receive alerts & other communications via SMA messages



For additional information on elements of the Profile page, please refer to the Sandata BI Quick Reference Guide

Basic terminology

- Dashboard: collection of card that tell a story,
- A collection: is a level of organization that allows you to group similar cards together on a page or Dashboard
- Cards: are the visual representation of your data
- Pages: are where one or multiple cards can be placed for viewing
- Dataset: When you have brought data into Domo, that data is represented as a **Dataset**



Default Pages

- **Payer Dashboard:** standard set of cards provided by Sandata, cards are broken into two dashboards.
- **Overview:** The Overview page is a personalized page where cards can be staged before copying or moving them to another page. This page is unique to each user and can also be shared with other users.
- **Favorites:** The Favorites page is a personalized page where you can save your favorite cards. Like the Overview page, this page is unique to each user and can also be shared with other users.
- **Shared:** The Shared page is where cards shared with you will appear. It may be blank at first, but more will appear as others in your organization share cards with you. This page is unique to you and can also be shared with other users.

Client & Employees Cards

- Provider Demographics
- Provider Listing
- Provider – Employee Profile By Provider Type
- Active Employee Listing
- Provider – Client Profile By Provider Type
- Active Client Listing By Account



Visit Information Cards

- Verified Visits – Auto vs. Manual
- Trending Visits by Day
- Visits By Day
- Visits By in Call Type
- Visit Listing (Current Week)
- GPS Visits Mapped
- Visit Modifications – By Visit Day
- Client Visit Conflicts
- Employee Visit Conflicts
- Daily Visits Over X Hours
- Weekly Visits Over XX Hours
- Reason Code Utilization By Visit Start Date
- Current Visit Exceptions
- Billable Activity By Provider



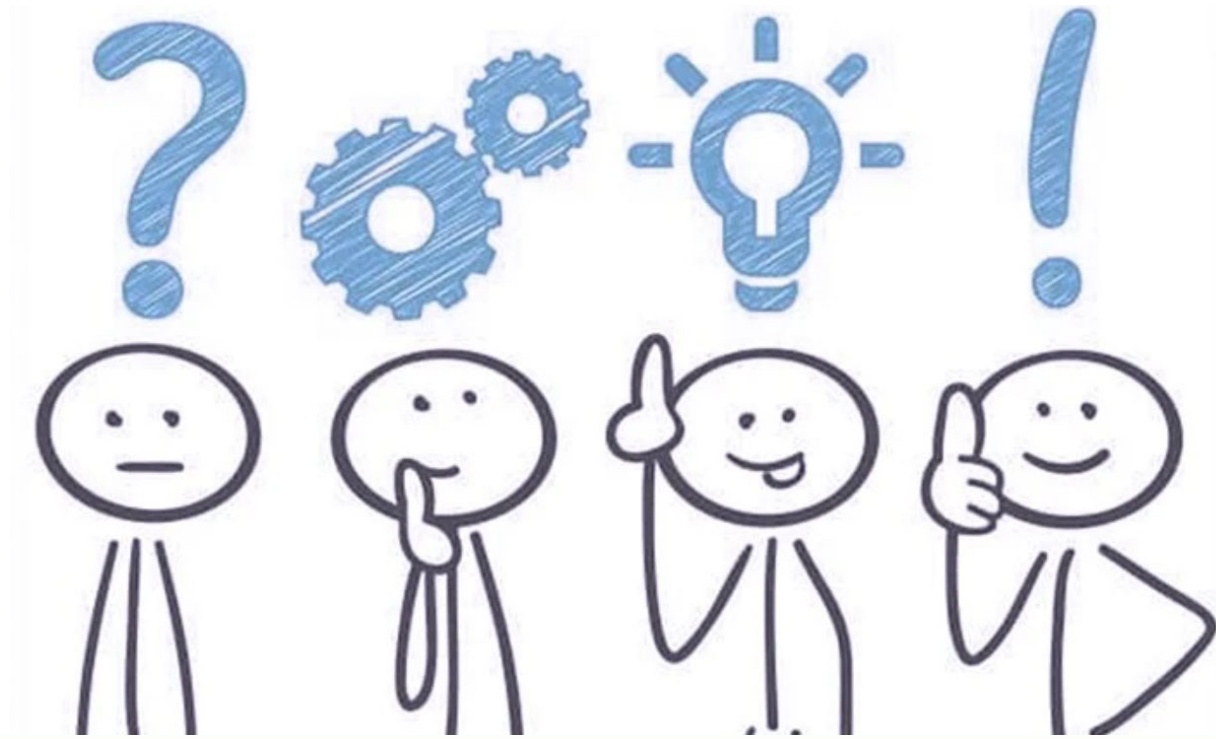
Card Feature's

- Exporting to CSV:
 - Select the Shared button located at the top of the card and then click on Save/Export. Depending on the type of card, you will see some or all these options: Excel, CSV, Email, Print and Slideshow. Select the option that best fits your needs.
- Setting up Alerts:
 - To set up an alert, open the card in full screen (Card Details view) and then click on the Alerts () icon at the top of the card. The Alerts wizard will prompt you to enter the name of the alert, the metric you are tracking and the condition that must be met for the alert to be triggered.
- Report Scheduler:
 - Sandata's BI Tool includes a Report Scheduler feature to email individual cards on a periodic basis. The email will include a snapshot of the card and a link to the card.

For additional information on these feature's, please refer to the Sandata BI Quick Reference Guide



Questions



Assignment for session # 2

- Log into DOMO with your credentials
- Go to your “Visits By Day “ card
- Go to visit date July 31st (write down how many visits were capture for that day)
- Drill down on July 31st
- You will now see visits by calling type & number of call by the hour
- Write down how many Manual calls were capture at the 8am hr.

