



Sandata

Get more right from the start

AZ/HI

Sandata BI Session #2

December 2022

SANDATA BI Overview

Sandata BI Session # 2

In this session, the following topics will be covered:

1. Authorization Staging
 - a) Deep dive into each of the 4 Authorization Staging cards
 - b) A mapping of the Authorization Staging Weekly Report to the new dashboard
 - c) Q & A on Authorization Staging Dashboard
2. Standard Dashboards
 - a) Follow up on homework from BI Session #1
 - b) Exporting & sharing data using Excel Spreadsheets
 - c) Q & A on Standard Dashboards





Sandata

Get more right from the start

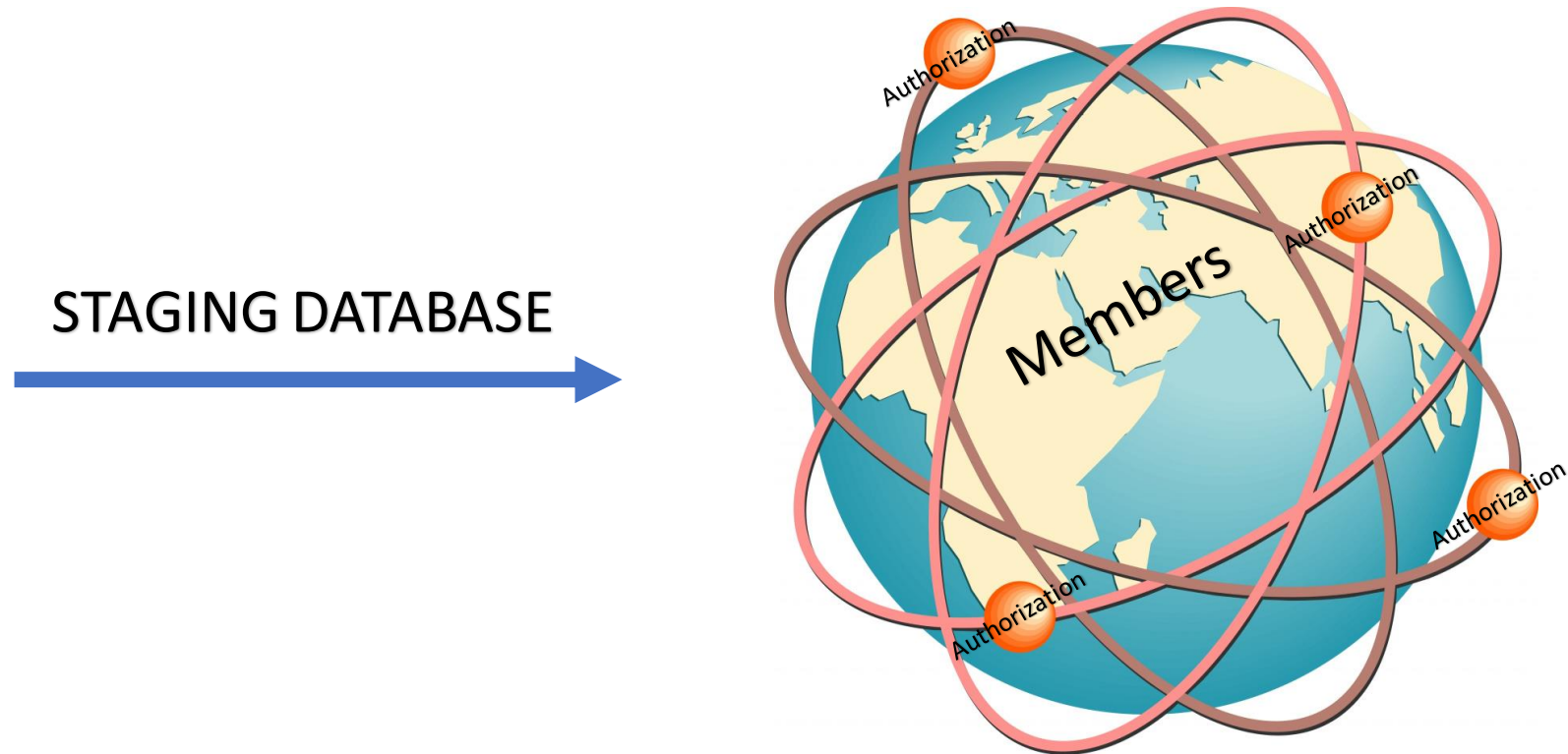
Authorization Staging Dashboard DOMO

Welcome!



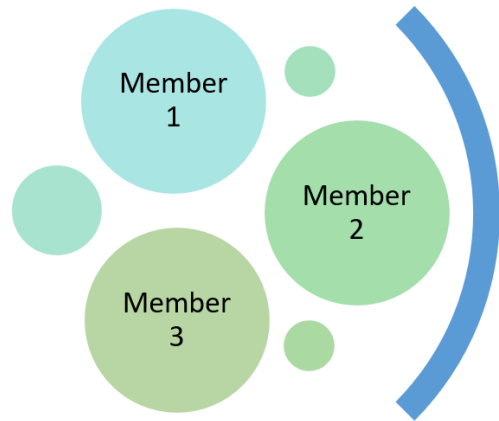
All the World's a Stage

We take the pieces of information for members and authorizations we receive and store them in a “staging” environment.



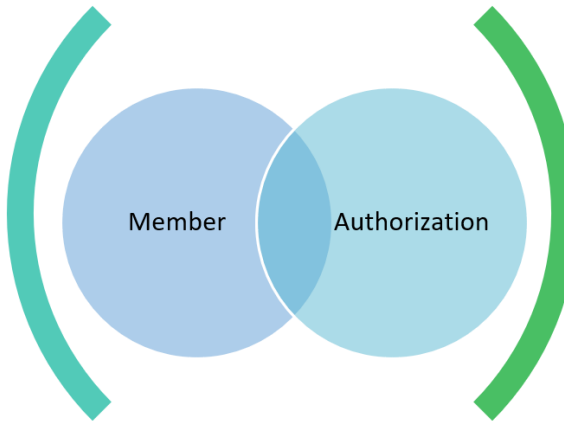
It's as easy as

1



Eligible Member is staged by
Medicaid

2



Member is paired with the Auth
as the authorization is sent

3



Member Appears in Sandata UI,
Auth may now be consumed

Auth Staging Excel Spreadsheet - Previous Process

- Database query once a week
- Added to an Excel workbook (Cumulative document from the past two years)
 - 17 tabs
 - Report page lists sets and MCO's data for aging buckets of 0-7 days, past 30 days and program to date
- Distributed via SharePoint to AZ-AHCCCS and HI-MedQuest
 - Distribution of information varies to MCO's from sources above

This data was stagnant and only reflected the point in time when the query was run in Sandata's database.

Sc

Data Loads:	Earliest:	10/01/20	Latest:	11/28/22
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(Excludes "Accounted-For" Records)

Past 7 Days

AUTHORIZATION SUMMARY

(Excludes "Accounted-For" Records)

[illegible]

Auth Staging Dashboard in DOMO – New Process – Drilling into the Data

- Options to see Validation Errors to assist with what auths need to be corrected/resent in a timely fashion
- Options to “clean up” data by removing authorizations via “accounted for process” (More to come on this later.)
- Options to customize your view of data for ease of use



How do I use DOMO with Authorizations?

- Quick filters across the top
 - Account State (Default: Payer's State)
 - Payor_id (Default: Associated Payer)
 - Accounted For (Default: Not Accounted For)
 - Aging Bucket (Default: Blank)
 - Date Range (Default: All Time)

The screenshot displays the 'Authorization Staging' dashboard in Domo. The top navigation bar includes the title 'Authorization Staging', a lock icon, a shield icon, and user information: 'Owner 1 owner' and a group of 7 users. Below the navigation bar is a filter bar with the following controls:

- A dropdown menu labeled 'AUTH FILTERS (DEFAULT)' with a plus icon to its right.
- A filter for 'Account State' with buttons for 'AZ' and 'HI' and a dropdown arrow.
- A filter for 'payor_id' with a 'Click to filter' link and a dropdown arrow.
- A filter for 'Accounted For' with a button for 'Not Accounted For' and a dropdown arrow.
- A filter for 'Aging Buckets' with a 'Click to filter' link and a dropdown arrow.
- A date range filter set to 'All Time' with a dropdown arrow.

A dropdown menu is open for the 'Date Range' filter, showing 'All Time' as the selected option. Below the filter bar is a large light blue rectangular area, likely a placeholder for a chart or table. At the bottom right, there are page numbers '8' and '34'.

What can DOMO do for me?

- Near real time authorization information in staging
 - Drilling into a section will give information on when data was updated/sync'd

The screenshot shows a DOMO dashboard interface. On the left is a vertical timeline with time slots from 02:00 to 03:00. A blue arrow points from the 02:00 slot to a yellow data card titled 'EVVIO_Authorizations_joi' which indicates 'DataSet updated 14 minutes ago'. Another blue arrow points from the bottom of the timeline to a yellow status bar at the bottom of the card that reads 'Page last synced: Nov 30, 2022, 3:00 pm'. The card also shows 'View Data Lineage' and 'Card Views: 16'.

Ability to choose which set to view and ability to drill into information to find out why auth isn't in EVV

Authorizations Action Sets / Next Steps

▲ Resolution Subset

- (Set 1): Auth Failed Validation
- (Set 2a): Missing Provider
- (Set 2b): Missing Client
- (Set 2c): Missing Provider & Missing Client
- (Set 3a): No Errors- Investigate
- (Set 3b): JSON Client Load Error
- (Set 4a): Alt EVV Auth
- (Set 4b): Future Auth
- (Set 4c): Expired Auth
- (Set 5): Unknown Issue

GRAND TOTAL

Authorization Action Sets/Next Steps

Sets provide information on why an authorization may be in staging.

Let's drill in!

- Drilling in will give more detail, e.g., If an auth is in 'Set 1' - Reference the Status Description that gives information such as "Failed Validation (Format Structure)."
 - Drilling in further allows users to view additional specific information in the "short_memo" or "full- memo" fields.

contains AZ...		never id Contains AZBUFC	Accounted For Contains Not Accounted For	Resolution Subset Contains (Set 1): Auth Failed Validation	Resolution Contains (Set 1): Auth Failed Validati...				
		Contract the width of this column							
		full_memo							
mbination.	ERROR: Violate payer, program, service and modifiers combination. Please see the specified values in the specification.								
	ERROR: The AuthorizationServiceID format is incorrect. The record should satisfy this regular expression [^(G0151 G0152 G0153 G0299 G0300 H2014 S5125 S5130 S5135 S5150 S5151 S5181 S9123 S9124 S9128 S9129 S9131 T1019 T1021 T2017)\$]. Invalid Value='S5136'								
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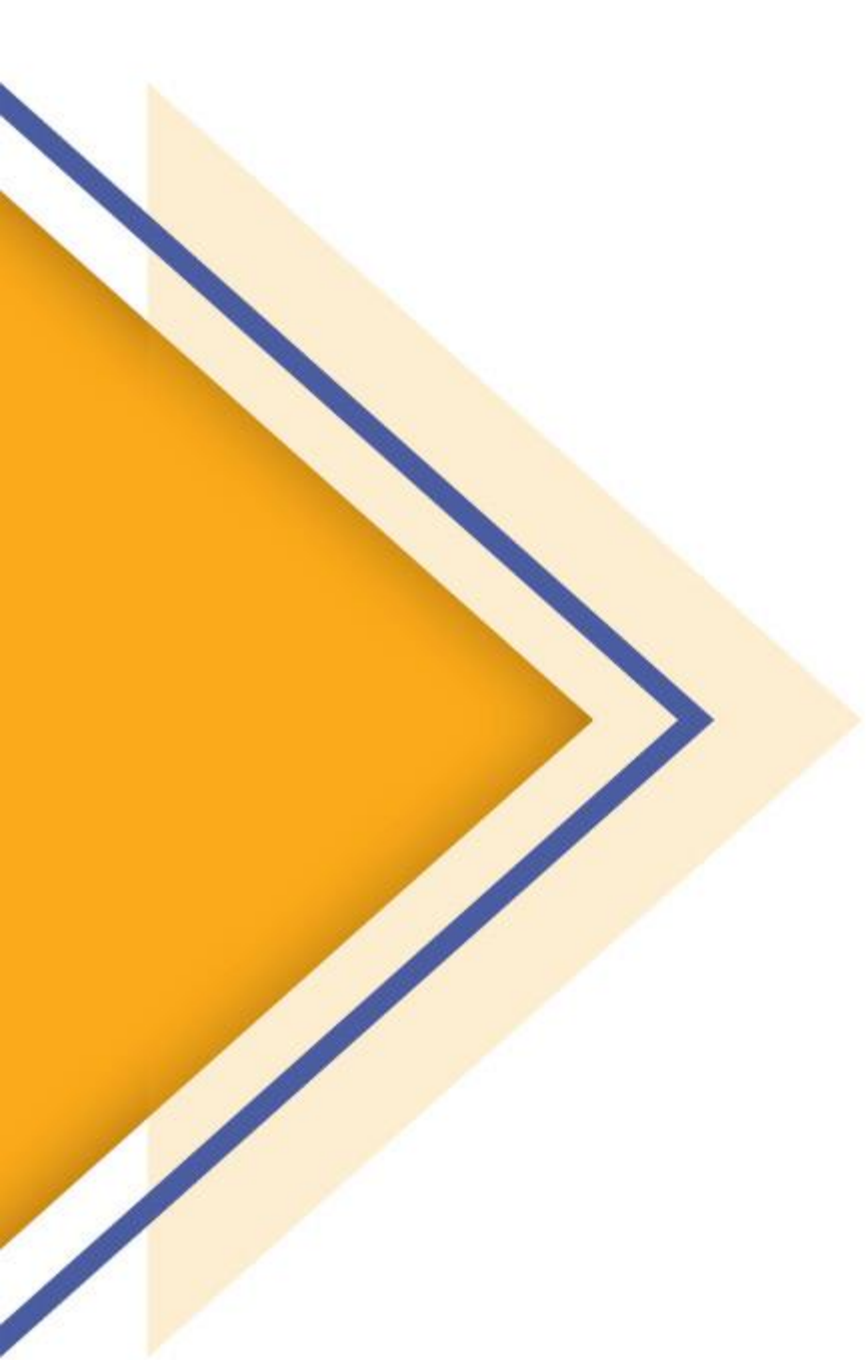
BI DOMO Data Dictionary

This document provides the actual tables/fields Sandata uses to populate the dashboard

- Data Set
- Field Name
- Type
- Source

NOTE: The Auth Status has numeric values showing in DOMO. Please reference the Data Dictionary for the description of those numeric values.





Questions?

Standard Dashboards Review

- Review Homework
- Guided Exercises
- Q & A



Session #1 Homework Review

- 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 captured 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 captured at the 8 am hour.



Exporting and Sharing Data

In this exercise, you will be able to export data to an Excel spreadsheet and share it with someone that has BI access and with someone that does not.



Questions

