



Sandata Business Intelligence (BI)

Powered by DOMO

Session 1: Intro to Domo



Objective

- ▶ Update Profile
- ▶ Review common terminology
- ▶ View cards in the standard dashboard and default pages
- ▶ Apply filters to cards
- ▶ Card Features:
 - Export, schedule reports
 - Share cards
 - Exporting to spreadsheet (CSV, Excel)
- ▶ Locate Resources

Getting Started: Logging into Sandata BI

- ▶ You should have received a welcome email with the subject line: **“Congrats! You’ve been Domo’d!”**
- ▶ If you have not received the email, be sure to check your spam filter
- ▶ The email contained the link to set up your username and password
- ▶ Bookmark the URL included in the email: <https://sandata.domo.com> for easy access

A screenshot of the Sandata BI login interface. It features a light blue header with the Domo logo. Below the header, there are two input fields: the first for an email address (containing "rsmith@sandata.com") and the second for a password (masked with dots). Below these fields is an orange "SIGN IN" button with a hand cursor icon pointing at it. At the bottom, there is a checkbox labeled "Remember me" and a link labeled "Forgot password?".

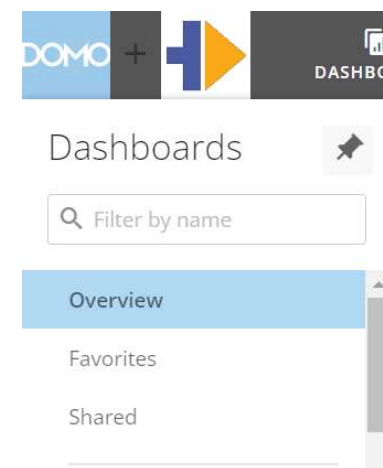
BI Terminology

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



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 or 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.



Dashboards

The Sandata dashboards are divided into two sections:



Clients & Employees

Includes cards with demographic information about providers, clients and employees



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.

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
- ▶ Visits By Day
- ▶ Visit Listing (Current Week)
- ▶ GPS Visits Mapped
- ▶ Client Visit Conflicts
- ▶ Daily Visits Over X Hours
- ▶ Overlapping Service Summary
- ▶ Reason Code Utilization by Visit
- ▶ Billable Activity by Provider
- ▶ Trending Visits
- ▶ Visits By In Call Type
- ▶ Visit Modifications – By Visit Date
- ▶ Visit Verification
- ▶ Employee Visit Conflicts
- ▶ Weekly Visits Over XX Hours
- ▶ Group Visits Summary by Week
- ▶ Current Visit Exceptions

Card Features

▶ Exporting

- Select the Share button located at the top of the card and then click on Save/Export. Options to Export a card's data to Excel, CSV, Email, PowerPoint. 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:

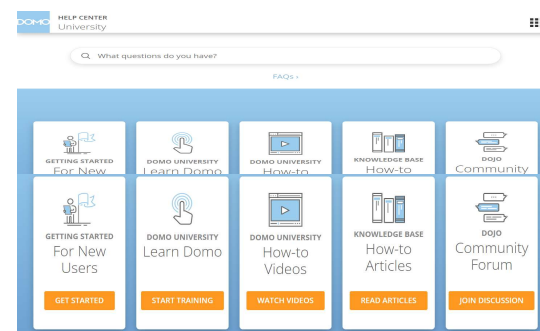
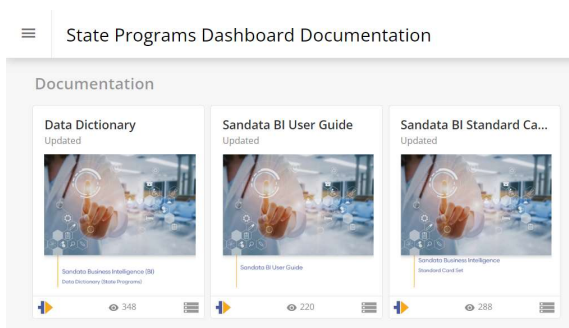
- Sandata's BI Tool includes a Report Scheduler feature to email individual cards on a periodic basis. The email will include a snapshot of the card and a link to the card.



Resources

There are several resources available that can be found online and easily assessable.

- Sandata On-Demand – reference materials, videos and the BI Quick Reference Guide
- State Programs Dashboard Documentation – located within Sandata BI dashboards are the Data Dictionary, Sandata BI User Guide and Sandata BI Standard Card Description
- DOMO Learn – access to DOMO Help Center



Resource: BI Card Descriptions

This document provides information on each section of the dashboard

- Purpose
- What the Card Shows
- Key Attributes
- Drillable columns

Resource: BI DOMO Data Dictionary

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

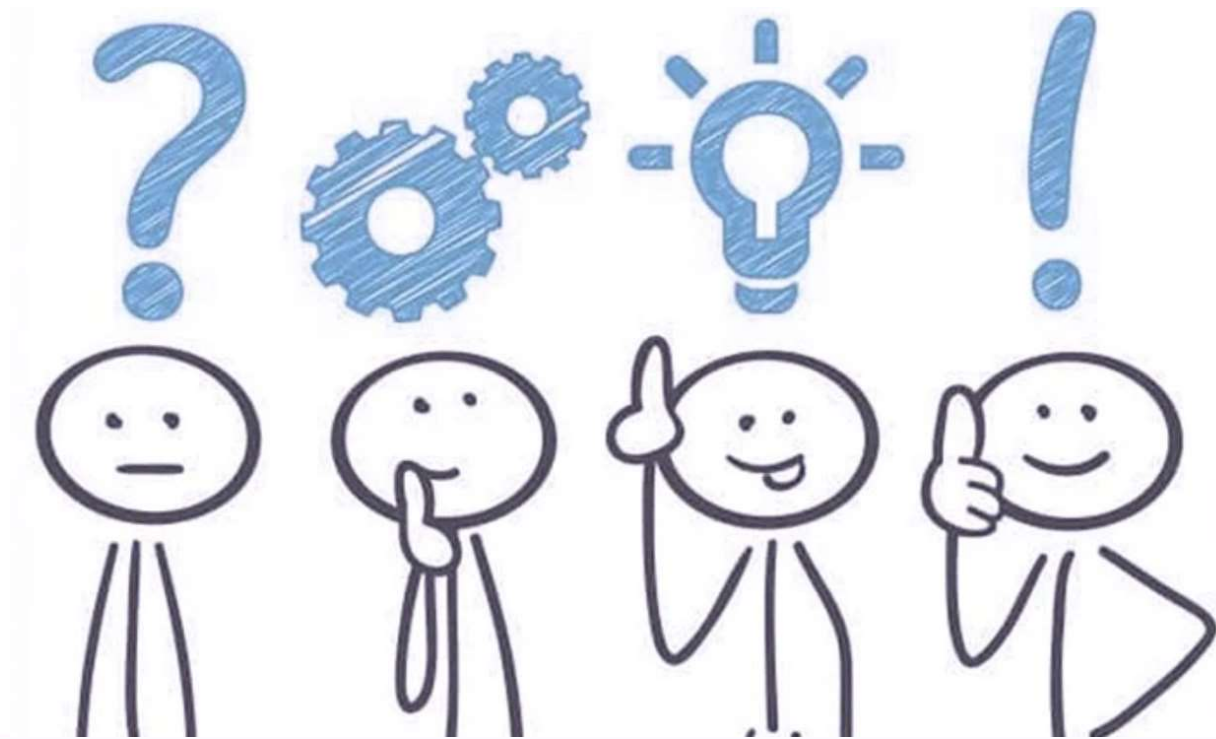
- Data Set
- Field Name
- Type
- Source



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



Questions: Use chat or voice



What You Have Learned

- View cards in the standard dashboard
- Add cards to the Favorites dashboard
- View card details in full screen mode
- Apply filters to cards
- Export, schedule reports
- Share cards
- Update Profile
- Locate Resources

