MANAGING DASHBOARDS AND REPORTING IN THE PAYER PORTAL

INTRODUCTION

In the CareBridge Payer Portal, The EVV Dashboard is the first page you will see when logging in. The Dashboard Page is a collection of key metrics and easy-to-understand data visualizations designed to provide actionable insight into your provider network and members you serve.

The Dashboard Page has six dashboards: an overview that broadly summarizes your provider network's activities and five focused dashboards for specific areas of EVV. Each of the five focused dashboards, by default, summarizes data for your entire provider network for the previous month on a rolling basis.

To view data on a single provider, click the **Provider** drop-down menu.

To adjust the date range, choose a pre-defined period from the **Select Time Period** drop-down menu or create a **custom date range**.

To create a custom date range:

1. Click the first **date** in the date range bar. Notice you can tell which date you are choosing by the **triangle** at the top of the calendar.

2. Select the **beginning date** -> You will automatically be prompted to select the **end date**.

3. Select the **end date** -> The dashboard will update automatically.

REPORTING

At times, you may want to view the raw data summarized in a dashboard or export it for further analysis and reporting. You can run and download reports from any Dashboard page to assist in management of your monitoring and operations.

To explore the data table or export it from the CareBridge Portal in a comma-separated value file:
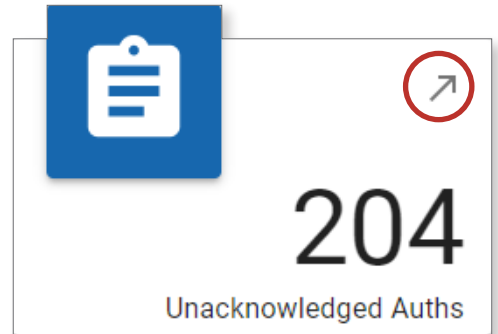
1. Click the **arrow** in the top right of any metric or chart. This will take you to the data table the metric of chart is summarizing.

2. Click **Filters** and apply any needed filtering.


3. Scroll down and click the **Export to File** button at the bottom left of the page.

4. Choose where on your computer to save the report and click **Save**.

DASHBOARDS

1. **OVERVIEW:** The Overview dashboard aggregates top-priority metrics in real time for you to monitor throughout the day. The "Items Outstanding" card includes 3 key numbers: Unacknowledged Authorizations, Unbilled Visits, and Open Discussions. The "Today" card aggregates 8 metrics and allows you to track what is happening with your providers as the day progresses. During implementation this will help you monitor EVV adoption.
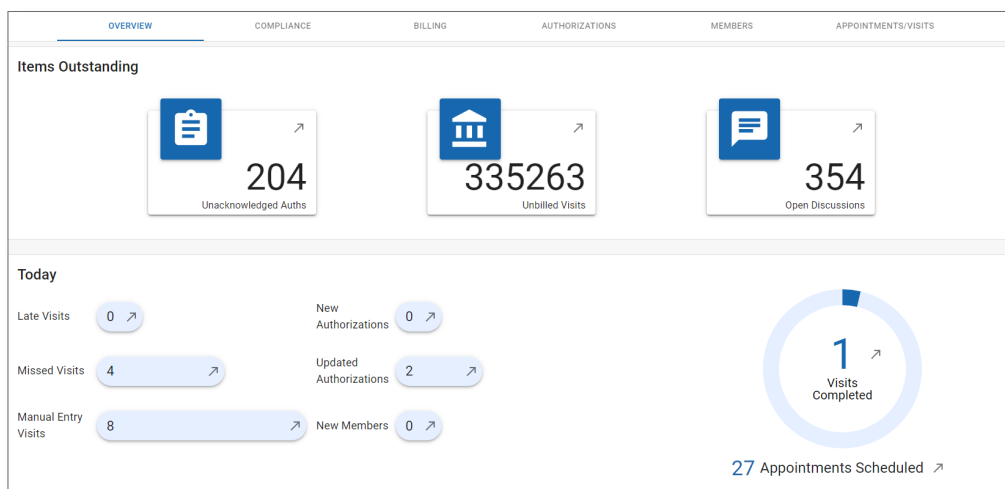
2. **COMPLIANCE:** The compliance dashboard displays a break-down of how well a provider agency is complying with EVV regulations. The compliance score is simply the percentage of visits that are EVV compliant. For deeper insight, the Compliance Dashboard is divided into late, missed, and manual entry visits. When a visit is late, missed, or entered manually, providers are required to enter a reason into the visit details. Tracking the reasons why visits were not EVV compliant can help identify patterns or trends that may need to be addressed.
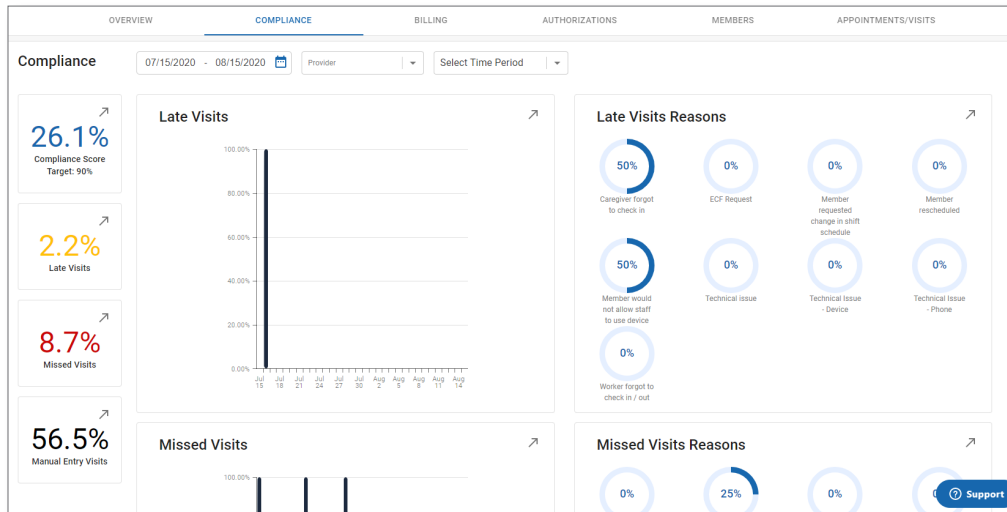
3. **BILLING:** The Billing dashboard has two components:

   a. A bar chart showing the amount of money in each stage of the revenue cycle for your provider(s), including amounts rejected or denied.

   b. The distribution of pre-billing check flags. Pre-billing checks is a core function of the CareBridge Portal that identifies problems with a visit that could cause a claim to be rejected. Having this data readily available allows you to quickly understand and identify trends in pre-billing issues providers have.
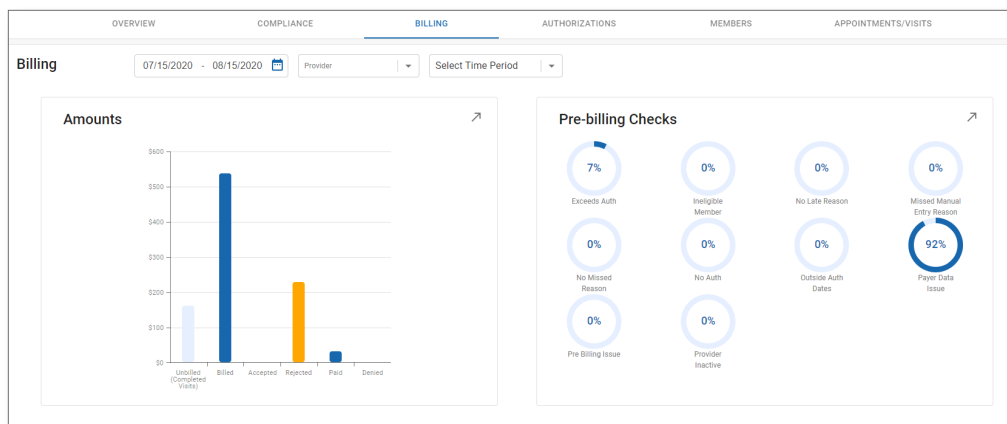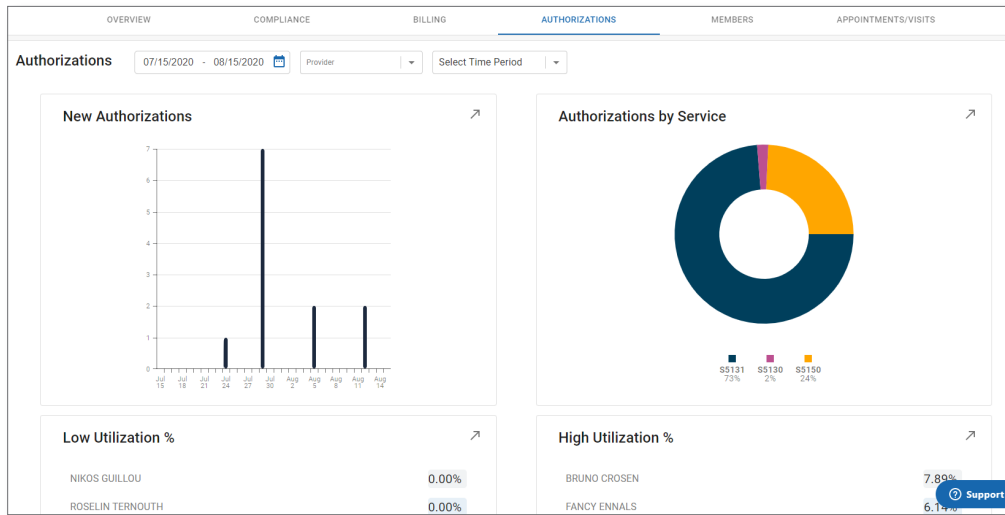
4. AUTHORIZATIONS: The Authorizations dashboard is designed to help you quickly understand two key TRENDS:

  a. New authorizations over time

  b. The distribution of authorizations by service

   And view two key LISTS:

  a. Members whose authorization utilization is below 25%

  b. Members whose authorization utilization is above 75%

5. MEMBERS: The Members dashboard has two components:

  a. The total number of active Members over time

  b. A list of Members whose visits have the lowest compliance score. If too many visits to a Member are not EVV compliant, action should be taken to determine the cause and address the compliance issues.
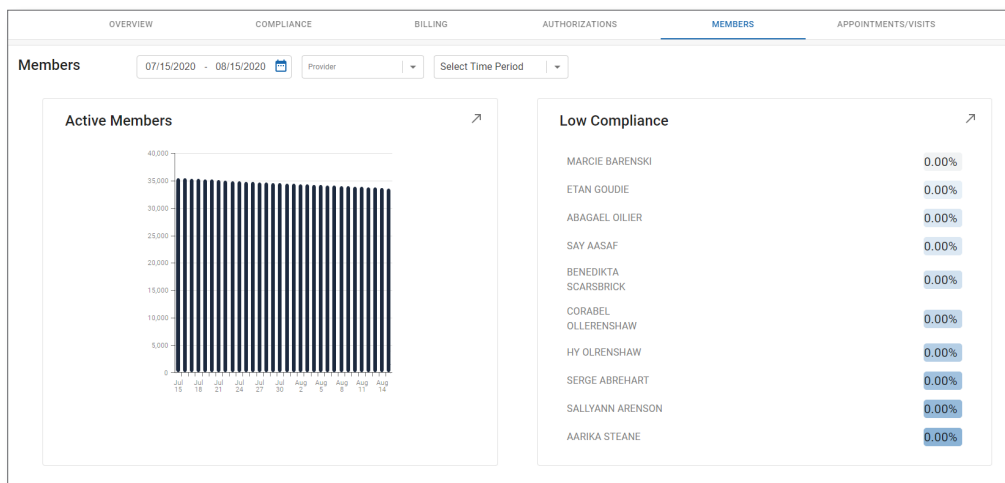
6. **APPOINTMENTS AND VISITS:** The Appointments and Visits dashboard provides a visual breakdown of trends over time for how visits are being completed in three categories:

    a. **EVV Visits:** how many visits are EVV compliant using the mobile application

    b. **IVR Visits:** how many are EVV compliant using interactive voice response (IVR)

    c. **Manual Visits:** how many visits are not EVV compliant because they were manually entered