



# Care Management Quick-Start Guide

# Care Management Dashboard

The Care Management Dashboard provides information about the patients on your panel who have had encounters at hospitals and some skilled nursing facilities, which can be viewed within three categories: (1) Admitted; (2) Recently Discharged; and (3) Trend by Month. The Dashboard is updated in near-real time (every 10 minutes).



# Drill Down to View Patient Encounter Data

Click on any data point to see information about patients who have recently experienced encounters.

Site Name	Assigned Room	Encounter Type	Start Time	End Time	Admission Reason	Discharge Location	Discharge Disposition
Kent Hospital	232	Inpatient	2016/05/04 13:45	2016/05/05 16:09	alcohol withdrawal uncomplicated	CNE Home Care VNA	6
Landmark Medical Center	LMC A27	Emergency	2016/05/03 22:15	2016/05/05 00:39	RASH	RI Sub Acute	REHAB
Rhode Island Hospital	B604	Emergency	2016/05/03 19:44	2016/05/03 20:10	Sprain	RI Skilled N	HOSPICE
Women and Infants Hospital		Inpatient	2016/05/02 13:51	2016/05/04 16:15	painful urination		1
The Miriam Hospital	0478	Emergency	2016/05/02 12:13	2016/05/03 14:37	LOW BACK PAIN, FEVER		
Landmark Medical Center	LMC A11	Emergency	2016/05/02 05:07	2016/05/03 07:33	ABD PAIN, BACK PAIN	HOME	HOME-HEALTH

Screenshots contained in this document and on any training files do not contain Protected Health Information (PHI). All data presented for training purposes has been randomly generated from databases of fictitious data.

# Active Panel Members



Care Management Clinical DashboardActive Panel Members

Report

1 - 500 out of 1067 records, Page 1 of 3

Active Panel Members as of June 15, 2018

\* Asterisks next to column headings indicate information submitted by your organization.

High Risk*	MPIID	CurrentCare Status	First Name*	Middle Name*	Last Name*	Date of Birth*	Age	Gender	Six Month ED Visits	Six Month Inpatient Visits	Charlson Comorbidity Index
	111000	Enrolled	Masako		Hillyer	1988-02-09	28	F	1	1	1 (Low)
	222000	Not Enrolled	Sherlyn		Trumble	1954-04-19	62	F	90	2	3 (Moderate)
	333000	Enrolled	Tabatha		Baeza	1944-02-12	72	F	2	3	1 (Low)
Yes	444000	Not Enrolled	Ettie	M	Maslowski	1964-02-11	52	F	26	8	7 (High)
	555000	Enrolled	Lavona		Fabela	1923-01-08	93	F	1	0	1 (Low)
	666000	Enrolled	Antoine		Routt	1935-04-04	81	M	1	0	1 (Low)
	777000	Not Enrolled	Moises		Eichler	1951-08-21	65	M	2	2	3 (Moderate)
	888000	Enrolled	Paris	A	Eliason	1957-11-12	58	M	1	1	5 (High)
Yes	999000	Not Enrolled	Mckinley		Stumpff	1939-11-03	76	M	3	3	12 (High)

- View all your active patients
- Find one specific patient (Sort or Filter by Last Name)
- Identify which patients need your help most (Sort or Filter on Charlson Comorbidity index, or ED or inpatient visits)
- Increase Enrollment (Sort or Filter on CurrentCare Status)
- Improve Communication (Locate recent phone numbers and addresses)

Helpful Tips

You will see 500 records per page; use the navigation arrows at the top to move to additional pages.

# Sort Tool

Within any member listing, you can access tools at the top of each column to change the way you view your Dashboard data.

The drop down arrow to the right of each field will allow you to easily sort all records in the report, but *you can only sort on this one field.*

Sort Ascending/Descending to quickly find:

- Patient name
- Patient Provider
- Highest number of ED visits
- Highest Risk scores
- Sort your custom columns (coming soon)

Site Name	Assigned Room
Landmark Medical Center	Sort Ascending
Landmark Medical Center	Sort Descending
Roger Williams Medical Ce	Filter
Roger Williams Medical Ce	Calculate
Landmark Medical Center	Chart
Women and Infants Hospita	Rollup
South County Hospital	Pivot (Cross Tab)

# Tools You Can Use

## Filter

### Easily Narrow in on the Specific Data You Need

The Filter Tool lets you look at one segment of data at a time. For example, to only see patients who are enrolled in CurrentCare, filter on the CurrentCare Status column.

Click to display tool filters

Site Name	Assigned Room	Encounter Type	Start Time	End Time
Women and Infants Hospital		Inpatient	2016-05-02 13:51	2016-05-03 13:15
Kent Hospital	232	Inpatient	2016-05-04 13:45	2016-05-05 16:09
The Miriam Hospital	0478	Emergency	2016-05-02 12:13	2016-05-03 14:37
Landmark Medical Center	LMC A11	Emergency	2016-05-02 05:07	2016-05-03 05:31
Landmark Medical Center	LMC A17	Emergency	2016-05-03 22:15	2016-05-05 00:39
Rhode Island Hospital	B604	Emergency	2016-05-03 19:46	2016-05-04 22:10
South County Hospital	316	Inpatient	2016-05-01 14:56	2016-05-02 17:20
Rhode Island Hospital	P422			2016-05-05 13:36
Grandview Center	N05			

Filter > Equals is most common, but choose whichever option best suits your query.

- Filter
- Calculate
- Chart
- Rollup
- Pivot (Cross Tab)
- Hide Column
- Freeze Column
- Unfreeze All
- Grid Tool
- Chart/Rollup Tool
- Pivot Tool
- Export
- Print
- Restore Original

- Equals
- Not equal
- Greater than
- Greater than or to
- Less than
- Less then or eq
- Between
- Not Between
- Contains
- Contains (match case)
- Omits
- Omits (match c



### If you see a blank screen when the page loads:

Drag the horizontal scroll bar at the bottom of the window to the left

## Select Your Variables

Report Filter x

☒ CurrentCare Status Equals Enrolled

Operator: AND Add Condition Filter Highlight Clear All

In this example, your filter on Enrolled members will only display enrolled members. It may be helpful to filter on sites, facilities or cities in which your members live.

Click on the drop-down arrow to open the menu

Click on the Filter button

Select one or more of the variables you wish to filter

Enrolled Not Enrolled

## Top Tips

### 1 Quick Filter

Need a quick way to filter? Simply left-click on a cell to get the Filter Cell option. This auto filters on the variable in the selected cell. Left-click again to remove the filter.

### 2 Remove Filters

It's easy to remove a filter, just click the X in the upper left corner of your screen:

Report Filter x

Don't worry: If you ever need to clear a filter, or any setting from a Dashboard tool, select Restore Original in the Dashboard tools menu to go back to the default settings.

### 3 Restore Original

Sort Ascending  
Sort Descending

Filter  
Calculate  
Chart  
Rollup  
Pivot (Cross Tab)

Hide Column  
Freeze Column  
Unfreeze All  
Grid Tool  
Chart/Rollup Tool  
Pivot Tool

Export  
Print  
Restore Original



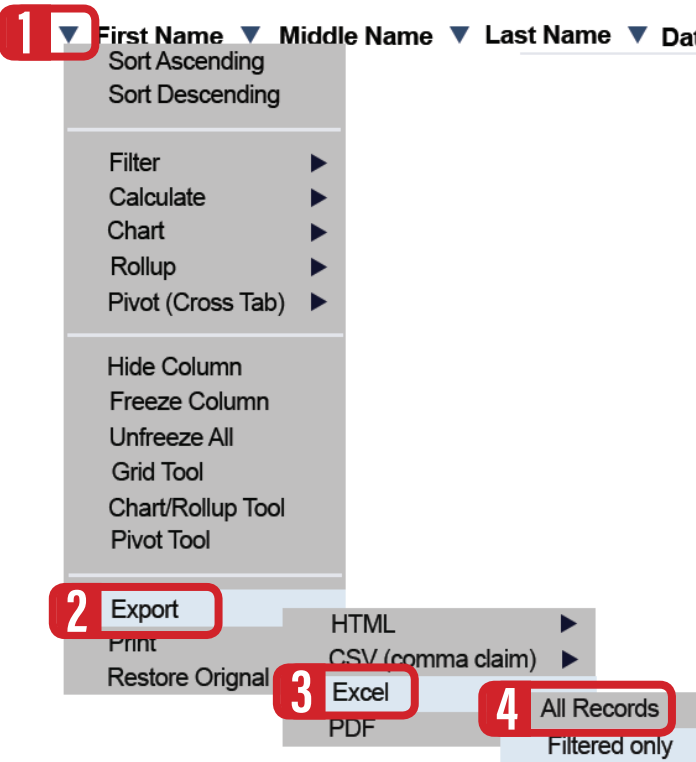
# Export a Report

For more flexibility in working with records, you may wish to export all records to Excel. To export the entire list of patients to an Excel spreadsheet:

- 1. Click on any field's dropdown arrow
- 2. Point to Export
- 3. Point to Excel
- 4. Point to All Records



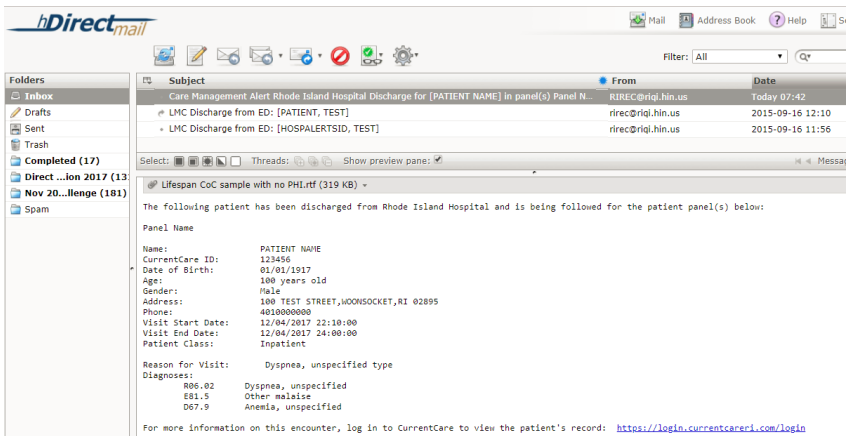
Reminder: When you are finished using the Dashboard, be sure to follow your organization's procedures for deleting any exported reports.



# Care Management Alerts

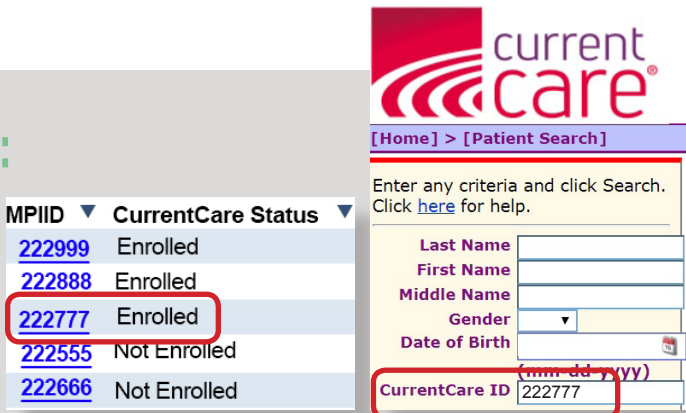
Each time your patients are admitted to or discharged from the hospital, you can choose to receive a Care Management Alert via Direct secure email.

These messages include key information about the status of your patient and the facility where they received treatment. The Care Management Alert email will also include discharge Continuity of Care (CoC) Documents from all Lifespan hospitals.



# Use the CurrentCare Viewer to Find More Info:

For any patients enrolled in CurrentCare, copy the MPIID number from the Dashboard or Active Panel Members list and paste it into the [CurrentCare Viewer](#) Search Screen:



# Frequently Asked Questions

## How can I see all encounters for one patient?

From the main Dashboard screen, drill down to any report. Click the patient's MPIID number, then from the drop down box that appears, click View All Encounters for MPIID. Note: The resulting report will display three encounter types: Emergency, Outpatient and Inpatient. You can apply the Sort feature to any fields on this report, or export the report to Excel to allow more flexibility in analyzing the data.

## How can I search for a specific patient?

Click on the Active Panel Members tab and apply the Filter feature to the Last Name field.

## How can I tell which of my patients are enrolled/not enrolled in CurrentCare?

Click the Active Panel Members tab, to see all patients on your panel. Apply the Sort feature to the CurrentCare Status Field.

## What's the benefit of using the Active Panel Members tab - won't all of my patients show in the Dashboard?

Remember that the Dashboard shows you a list of patients who have had encounters. The Active Panel Members tab shows you a list of all patients on your panel - including those who may not have had any encounters at all. A great benefit to using the Active Panel Members tab is to sort or filter the Six Month ED and Six Month Inpatient fields, to identify patients who are at risk.

## What types of Risk Scores can I find in the Dashboard and how are they calculated?

The Charlson Comorbidity Index is a predictor of mortality risk based on a weighted score of past chronic conditions. The LACE index is an indicator of readmission risk based on: Length of stay/Acuity of admission/ Charlson Comorbidity Index/ED - 6 months ED visit count.

## How can I tell if my patients have gone to facilities outside my hospital system?

Looking for the desired month and year, click either the inpatient or emergency data point in the bottom section of the Dashboard, then click the title that appears: Inpatient and Emergency Admissions by Day. The resulting list shows all encounters for patients who have had both inpatient and emergency encounters for this particular month. Apply the filter feature to sort on multiple criteria, e.g. Facility Name, Site Name, Last Name. Alternatively, you can export the original list to Excel and apply sorting features within Excel.

## Can I print any report that I create?

There is a Print option at the bottom of the field name drop-down menu, however, the records are not able to be formatted before printing. It's recommended that instead of using this feature, you use the Export option on the drop-down menu to export the records into Excel, where you'll have more flexibility for sorting and printing.



To find more information, visit: [RIQI.org/CareManagement](https://RIQI.org/CareManagement)

## *Why Use Care Management Services?*

Care Management Alerts and Dashboards can help you to provide timely interventions and care coordination for your patients.

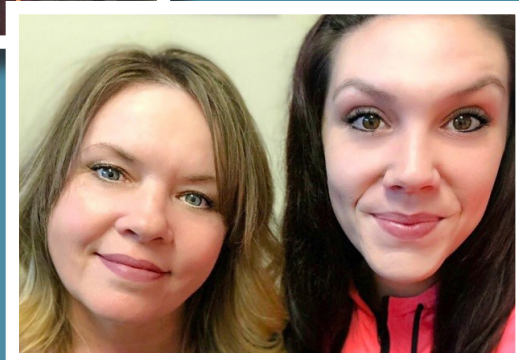


Now, with the Care Management Alerts and Dashboards, we can all be on the same page. These tools allows us a chance to have better coordination and collaboration in care with both the client and their providers.

— Community Care Alliance

The impact of having Care Management Alerts and Dashboards is that we now have better knowledge about the all-around care of our patients.

— Center for Treatment and Recovery



**Rhode Island  
Quality Institute**

**For More Info:**

[RIQIBusinessServices@riqi.org](mailto:RIQIBusinessServices@riqi.org)

888-858-4815

[RIQI.org/CareManagement](http://RIQI.org/CareManagement)