List of Updates for July 12th

Bucket	Enhancement(s)	Slide #
Provider Scorecard	• Enhanced Provider Scorecard Design • Integration with Transparency Star Rating Data • Expanded information such as quarterly trending, benchmarking, and split by location	**2**
Provider Scorecard Configurations	Available to Admin Users Only • Ability to configure descriptive text on key metric and footnote of scorecard • Ability to turn key sections on or off • Configure questions and key metrics at provider or customer level	**2-4**
System Reporting	• Introduce new reporting to allow users to easily compare groups, locations, and providers across the organization • Two new visualizations now available: • System Dashboard • System Details	**5**
Group Manager (beta)	Available for Admin Users Only • Ability for users to create and update groups of Facilities and Providers	**6**
Group Filtering & Reporting (beta)	• Use of Groups as filters on all reports • Use of Groups as reporting units on System Dashboard	**7**
Provider Sub-Specialty Benchmarks	• Introduce Provider CMS Sub-Specialty Benchmarks	**8**
Other Updates / Fixes	• Integrated in-application announcements for end users • Provider Scorecard Performance Enhancements • Image and CSV Exports work regardless of number of parameters	**9**

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Provider Scorecard
& Scorecard Configurations (1/3)

Details:

Trend Period
- Users can select between Quarterly Trend or Monthly Trend
  - If Monthly question scores will show last 2 completed months
  - If quarterly question scores table will show last 2 completed quarters

Key Metric
- The Key Metric section can be toggled on or off and includes a selected key metric, scaled response options, along with a customizable description section.
- Key metric can be defined either at the Customer level or at the Provider level.
  - Only one Key Metric can be defined at the Customer Level.
  - Definition of key metric is done within the, "select questions screen" of the question scores section.
  - Key Metric selection at Customer level will apply to all providers that are collecting data for the selected Key Metric question.
- Key Metric selection can be overridden at the individual provider level located within the Providers page of the administration section.
- If Key Metric section is turned on but no Key Metric is selected then Key Metric section won't populate.

Peer Rankings and Locations
- If Key Metric is turned on, customers can also turn on two additional sections: peer rankings & location scores.
- Peer rankings shows provider rankings against other internal providers if org groups have been setup.
- Org groups can be setup within the Group Manager Tab
- Locations scores show key metric scores & returns for providers that practices at multiple locations.
  - Scores will show for all locations a provider has returns from.

Provider Scorecard
& Scorecard Configurations (2/3)

Details:

Question Scores
- The Questions Scores section allows users to select which questions they want to be included or excluded at either the Customer level or at the Provider level.
- The Questions Scores section includes the ability to show an internal benchmark, external benchmark, and target goals.
- Internal benchmark column can be turned on or off.
  — Internal benchmark is the organizations average score for all providers
- External benchmark column can be turned on or off.
- Users can select from NRC percentiles.
  — Users can also additionally show external benchmark by provider NPI category and organization type.
- Target goals columns can be turned on or off.
  — Targets are set on the Organizational Targets page within the administration section.
  — Target goals can be overridden at the individual provider level within the Providers page of the administration section.

Provider Tips
- Physicians Tip can be turned on or off.
- When the Provider Tips video is turned on a call to action button will appear underneath the key metric score. When clicked, the button directs users to the Provider Tips video content library

Patient Comments
- The Patient Comments section can be toggled on or off
- When turned on shows all patient comments from the last 31 days.

Provider Scorecard
& Scorecard Configurations (3/3)

Details:

Transparency Integration Star Ratings
- For customers that use both Real-time and Transparency three additional sections can be configured to be turned on or off: Star Ratings, Scheduled Comments, & Published Comments.
- In order for Transparency data to show on the Provider Scorecard the Real-time Transparency integration must be established.
  - If you do not see the option to configure Transparency but believe you should, please contact your customer success manager.
- The star ratings section can be turned on or off. It shows a providers all-time star ratings along with displaying the organizations average star rating.

*Transparency Integration Scheduled Comments
- Scheduled comments section can be turned on or off. Scheduled comments shows comments that are scheduled to publish in the next 31 days.

*Transparency Integration Published Comments
- Published comments section can be turned on or off. Published comments shows comments that have published live in the previous 31 days.

*Comments showing in the scheduled and published comments sections will depend on your Transparency comment publishing rules.

Footnote
- The footnote section can be completely configured to include helpful custom text to providers.

The new Provider Scorecard will be available on both the new and old site to ensure subscriptions are consistent.

All new features on the provider scorecard will be turned off by default so that the scorecard is as similar as possible to the previous version. The biggest change will be the inclusion of the 2 trend periods to the Question Scores table, which all providers will see with the July 15th Scorecard.

System Reporting

Details:

1. There are two tiers of reports to help users analyze scores across the entire organization.
   - System Dashboard
   - System Details

2. Both reports show a table of data for all questions eligible for the question pod(s) selected.
   a) **YTD** – always shows the score year to date from today
   b) **Last 3 Months** – always shows the score for the last 3 months from today
   c) **Last Month** – always shows the score for the last month from today.
   d) **N-size** – shows the number of returns for the question for the selected time period
   e) **Score** – shows the score for the question for the selected time period
   f) **Target** – can be either a benchmark or an organization goal
   g) **Gap** – shows the distance from the Score to the Target. If score is above the target, the results are green. If the score is below the target the results are red.
4. Drill through from the System Dashboard to the System Details by clicking on the "Gap Bar".
5. System dashboard defaults to Question Pod tab until groups are created.
6. System Dashboard allows for users to compare groups of locations or providers (see grouping slide for more details)
7. System Details allows users to compare locations or providers within a group.
   — For system details Facility Report only the lowest level location is shown. If user wants to compare groups of locations they can create a group using the grouping utility and utilize the system dashboard.

System Dashboard allows for easy comparison across reporting groups or question pods, while, the **System Details** report allows for easy comparison of locations and providers.

Group Manager(beta)

Group Manager allows for flexible grouping of facilities and providers that can be used as reporting units and reporting filters. Grouping allows for faster analysis to those looking to narrow results to a focused data set, or compare groups across the system.
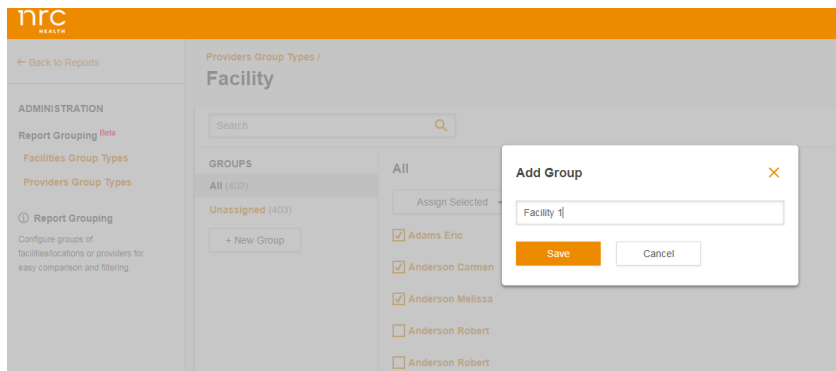
1. Create New Group Type for Either Locations or Providers
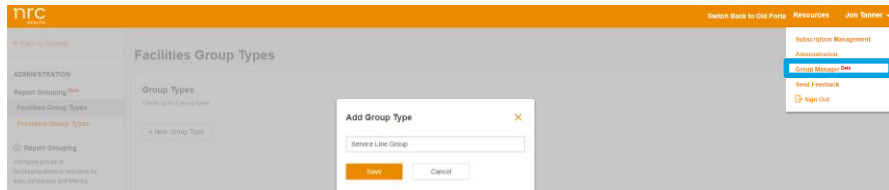
2. Create Groups within Group Type By Selecting Eligible Locations or Providers
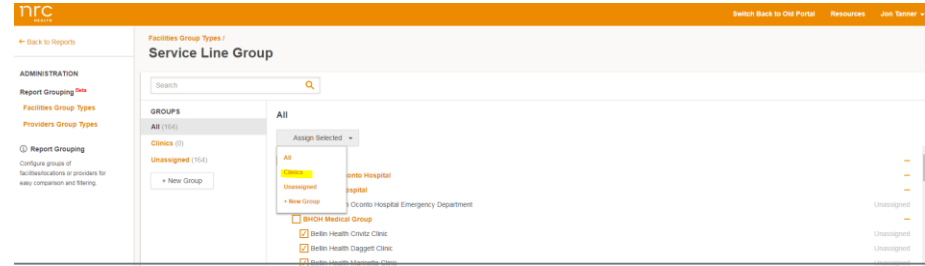
3. Repeat for any needed Location or Provider Group Types and Groups

Details and Hints:

1. Available to Admin Users Only
2. Customers are limited to 5 Group Types for Facilities and 5 Group Types for Providers
3. There can be unlimited Groups within a Group Type
4. A location or a provider can only be used once within a Group.
5. Utilize the left hand menu to switch between creating Facilities and Providers Group Types
6. Provider Groups previously created as "org groups" are available in Group Manager. **Please make any further edits or changes using Group Manager only! Edits made on provider tab will not be reflected in reporting.**
7. Be sure to save the group type after making any edits
8. Numbers in parenthesis will show how many Facilities or Providers have been assigned to the Group.
9. Any new Facilities or Providers will automatically be grouped in the "Unassigned Bucket"
10. **Once created Groups will Populate on System Dashboard and as Filters the following day.**

# Group Filtering and Reporting **(beta)**

Details:

1. Once created ,Group Types and Groups will appear on reports and as filters the following day.

2. Group Types will appear as tabs on the system dashboard. Once selected Groups within the Group Type will be the rows within the report.

3. To start out, as this is a brand new feature, selected Groups and Group Types will not be saved in Preset Filters.

4. Similarly Org Groups will not appear on exports or subscribed reports.

5. By default all Groups are unchecked, meaning none have been applied as a filter. Selecting Groups will filter results in the report accordingly.

6. When selecting a Group as a filter, it will filter the list of available Facilities or Providers if "Show only if data present" box is checked.

7. Filtering a Facility or a Provider list will not filter Groups or Group Types.

Groups created using the Grouping Manager, offer an easier way to compare performance across the system, as well as filter results to a particular area of interest.

Utilize created groups as reporting units on the System Dashboard
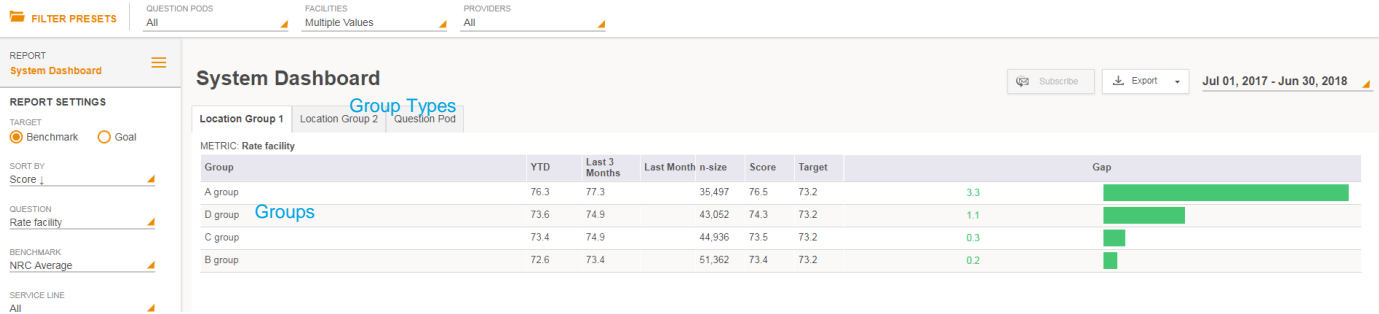
Utilize created groups as filters on all reports

7
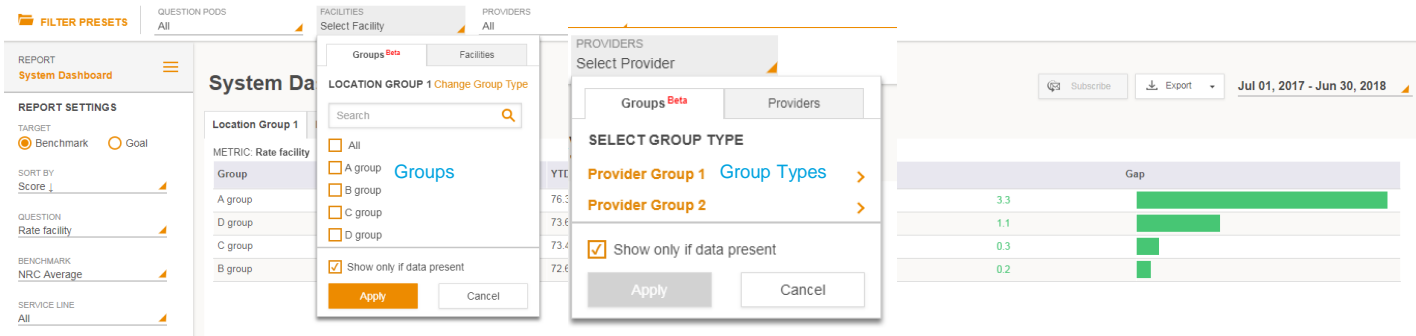
Provider Sub-Specialty Benchmark

Details:

1. Provider sub-specialties are based on NPI provided in respondent file

2. Provider sub-specialty benchmark is available on the following reports
   - Benchmark Report Question and Provider Tab
   - Score Summary Report Provider Tab
   - System Dashboard and System Details Report
   - Provider Scorecards

3. For an organization sub-specialties will only appear if they have a provider that has an NPI that matches the sub-specialty.

Benchmarks for CMS Sub-Specialties (e.g. Internal Medicine – Hematology) are now available in Real-time!

Other Updates/Fixes

Additional Updates and Fixes Include…

1. Integrated in-application announcements for end users

2. Provider Scorecard Performance Enhancements will allow subscriptions to send earlier in the day on the 15th and load in the Real-time application faster.

3. Image and CSV Exports now work regardless of number of parameters selected.