

Care giver performance monitoring

In-Home care service provider

Unlocked visibility into Care Giver's operational performance for the leadership team to track schedule fulfillment, lost revenue opportunities and efficiency at multiple cuts by automating data ingestion using Alteryx and building Tableau based dashboards

In-home care service provider needs to monitor care giver's performance

Picture this...

You're looking to provide visibility into operational performance of the Care Givers which were on eRSP (EMR) reports. Currently, these reports are manual, subject to ad hoc changes, available at a weekly/monthly level in a fixed format and are missing historical trends.

You turn to Accordion.

We partner with your team to provide visibility into Care Giver's operational performance for the leadership team to track schedule fulfillment, lost revenue opportunities and efficiency at multiple cuts by automating data ingestion using Alteryx and building Tableau based dashboards, including:

- 1) Setting up automated ingestion of EMR data from eRSP using Alteryx workflows to clean , transform and harmonize the data to a reportable form.
- 2) Providing visibility into Fulfilment Rate by tracking the percentage of the actual hours served against the scheduled hours and improved granularity across multiple attributes like Payor, Region, Branch, Visit Type etc.
- 3) Tracking zero claim hours with associated reasons highlighting the missed revenue opportunity due to scheduled but unserved hours due to cancellations, no-shows etc.
- 4) Calculating the 'Gross Margin %' for Care Givers and other attributes by comparing the revenue generated against the wages and providing insights into seasonality and profitability across various data cuts.

Your value is enhanced.

You have automated the extraction and enabled granular reporting that eliminated~ 2 hours of daily manual effort and improved the precision of reporting. You also have improved the tracking on operational performance of the Care Givers to enable the leadership to improve the efficiency. Improved tracking of the reasons for zero-claim hours unlocked insights to take relevant measures to improve patient experience and prevent revenue loss.

KEY RESULT

- 2 hours/day of manual effort saved
- Cost savings of \$20K per month

VALUE LEVERS PULLED

- Alteryx Workflows
- Tableau Dashboards

Care giver performance monitoring for an in-home care service provider

Situation

- Client had limited visibility into operational performance of the Care Givers and they relied on eRSP (EMR) reports for the same. However, the reports were manual, subject to ad hoc changes, available at a weekly/monthly level in a fixed format and were missing historical trends.
- Partnered with the client to develop the comprehensive logic to provide enhanced visibility the operational health by automating Alteryx workflows and building tableau-based dashboards. The refresh cadence was enhanced to a daily level and improved the granularity across multiple attributes like Payor, Region, Branch, Visit Type etc.

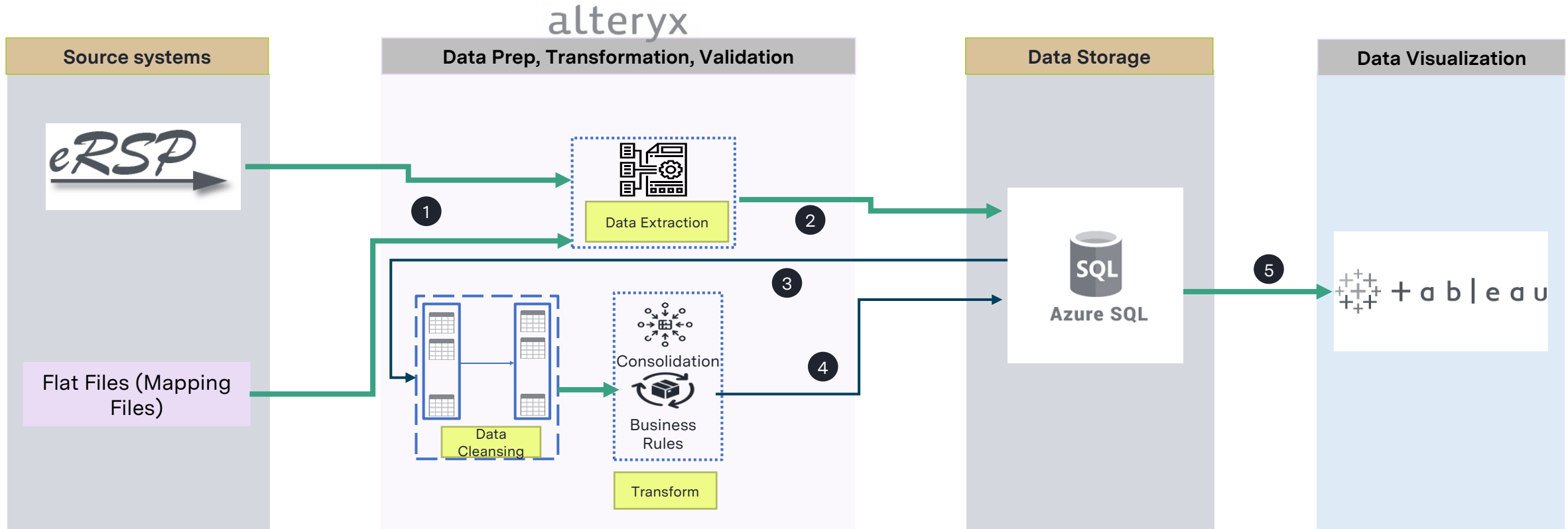
Accordion Value Add

- Set up automated ingestion of EMR data from eRSP using Alteryx workflows to clean , transform and harmonize the data to a reportable form
- Provided visibility into Fulfilment Rate by tracking the percentage of the actual hours served against the scheduled hours
- Tracked Zero Claim Hours with associated reasons highlighting the missed revenue opportunity due to scheduled but unserved hours due to cancellations, no-shows etc.
- Calculated the 'Gross Margin %' for Care Givers and other attributes by comparing the revenue generated against the wages and providing insights into seasonality and profitability across various data cuts

Impact

- Automated the extraction and enabled granular reporting eliminated~ 2 hours of daily manual effort and improved the precision of reporting
- Improved the tracking on operational performance of the Care Givers to enable the leadership to improve the efficiency. Improved tracking of the reasons for zero-claim hours unlocked insights to take relevant measures to improve patient experience, and prevent revenue loss

Approach - High level data flow



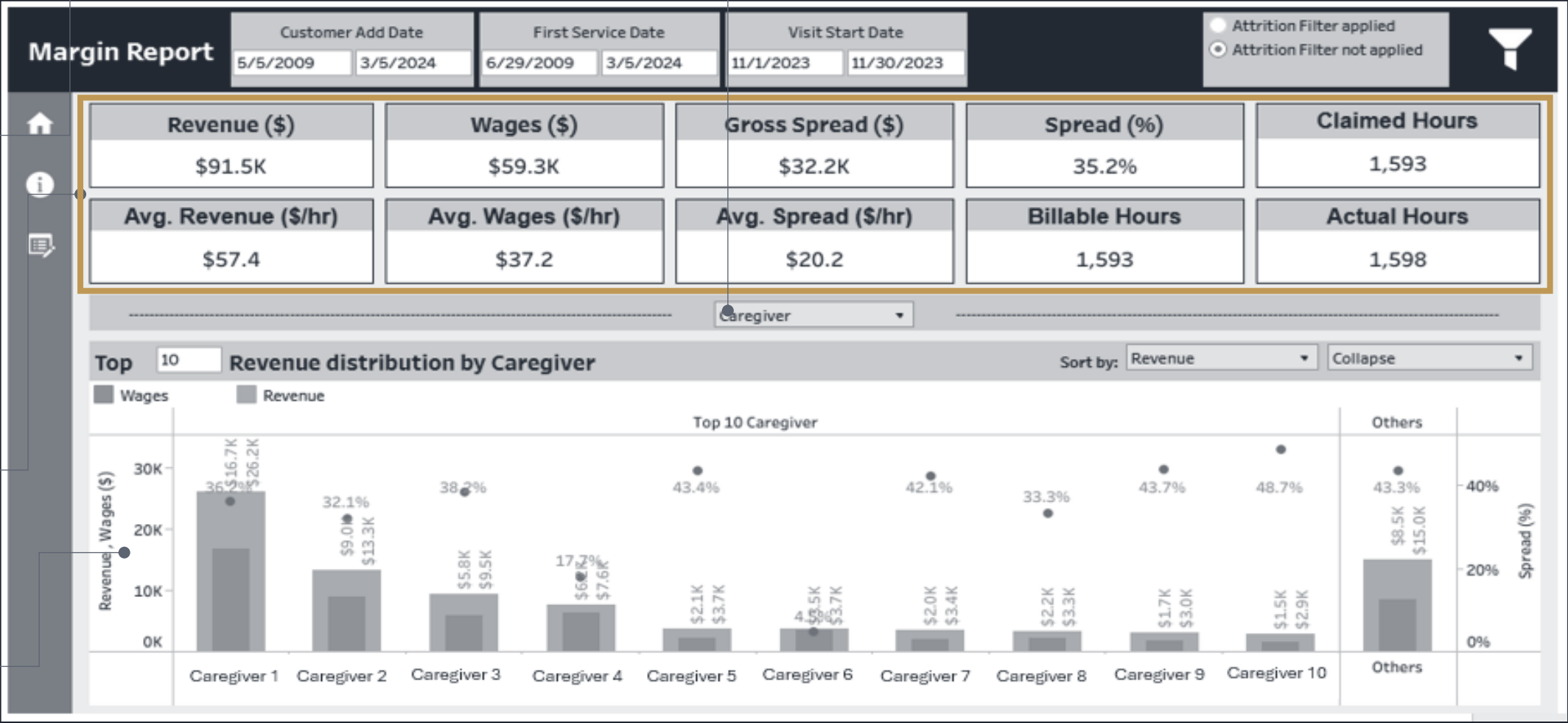
- 1 Direct data extraction from eRSP (EMR system) and Flat files
- 2 Extracted data is stored within Azure SQL server
- 3 Raw data stored in Azure SQL server are cleaned and transformed as per business specific rules discussed with client Team
- 4 The cleaned and transformed data are stored in Clean and Reporting tables within Azure SQL server
- 5 Data stored in Azure SQL server is used for creating dashboards in Tableau

Margin report by Caregiver (1/2)

- Caregiver
- Branch
- Corp.Dev.
- Region
- Sales Person
- Intake Coordinator
- Payer Class
- Detailed Payer
- Detailed Referrer
- Star Category
- Referrer Class
- Summary Referrer
- Intake By
- Caregiver
- Payor
- Visit Type
- Care Scale Results

Available Attributes

Flexibility to toggle to more attributes like Payor, Region etc. in addition to Care Giver



Shows the major Operational KPIs for the selected date range

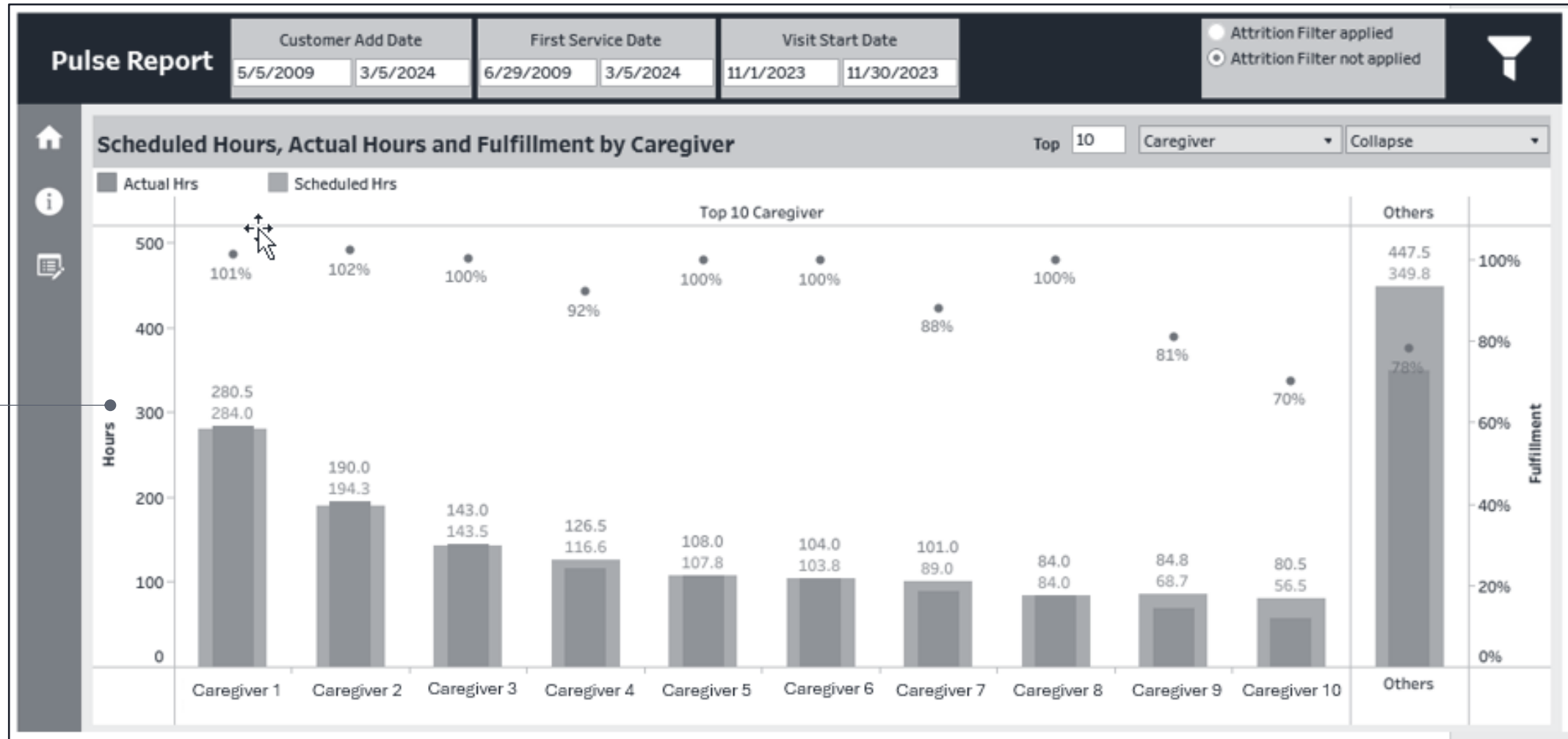
Shows the Revenue and Wages along with Spread % by Caregivers based on the selected date range

Margin report by Caregiver (2/2)

Daily Revenue (\$), Wages (\$) and Spread (%) by Caregiver										
	Grand Total			11/1/2023			11/2/2023			Revenue
	Revenue	Wages	Spread (%)	Revenue	Wages	Spread (%)	Revenue	Wages	Spread (%)	
Grand Total	\$91.5K	\$59.3K	35.2%	\$3.3K	\$2.3K	31.2%	\$3.0K	\$2.2K	27.1%	\$3.1
Caregiver 1	\$0.1K	\$0.1K	37.5%							
Caregiver 2	\$0.3K	\$0.1K	49.6%							
Caregiver 3	\$9.5K	\$5.8K	38.2%							
Daily Trend of Hourly Revenue, Wages and Spread by Caregiver										
	Grand Total			11/1/2023			11/2/2023			Avg. Revenue
	Avg. Revenue	Avg. Wages	Avg. Spread	Avg. Revenue	Avg. Wages	Avg. Spread	Avg. Revenue	Avg. Wages	Avg. Spread	
Grand Total	\$57.4	\$37.2	\$20.2	\$53.1	\$36.5	\$16.6	\$54.4	\$39.7	\$14.8	\$5
Caregiver 1	\$32.0	\$20.0	\$12.0							
Caregiver 2	\$32.0	\$16.1	\$15.9							
Caregiver 3	\$91.1	\$56.3	\$34.8							

Shows the overall and Hourly Revenue, Wages and Spread by Caregivers on daily basis based on selected date range

Schedule fulfillment performance by caregiver



Shows the Scheduled Hours, Actual Hours and Fulfillment by Caregivers based on the selected date range

Schedule fulfillment performance details by caregiver

Pulse Trends

Customer Added Date

5/5/20093/5/2024

First Service Date

5/5/20093/5/2024

Visit Start Date

11/1/202311/30/2023

☐ Attrition filter applied

☒ Attrition filter not applied

Daily Actual Hours, Scheduled Hours and Fulfillment by Caregiver

Daily

Caregiver

	Grand Total			11/1/2023			11/2/2023			
	Scheduled Hrs	Actual Hrs	Fulfillment	Scheduled Hrs	Actual Hrs	Fulfillment	Scheduled Hrs	Actual Hrs	Fulfillment	Scheduled Hrs
Grand Total	1,754.8	1,597.8	91.1%	64.0	62.0	96.9%	56.0	56.0	100.0%	58.0
Caregiver 1	8.0	4.0	50.0%							
Caregiver 2	8.0	8.0	100.0%							
Caregiver 3	104.0	103.8	99.8%							
Caregiver 4	108.0	107.8	99.8%							
Caregiver 5	37.0	22.0	59.5%							
Caregiver 6	84.8	68.7	81.1%	5.0	5.3	105.0%	5.0	5.0	100.0%	5.0
Caregiver 7	6.0	6.0	100.0%							2.0
Caregiver 8	31.0	0.0	0.0%	5.0	0.0	0.0%				
Caregiver 9	36.0	37.0	102.8%							12.0

Shows the Daily Actual Hours, Scheduled Hours and Fulfillment by Caregiver based on selected date range

Zero claim hours by caregiver

Shows the Zero Claim Hours by Reason and Caregiver based on selected date range

Zero Claim Report

Visit Date

11/1/202311/30/2023

Sales Person

(All)

Payer Class

PD

Intake Coordinator

(All)

i

Zero Claim Hours by Reason and Caregiver

Zero Claim Hours

Caregiver

	Grand Total	Caregiver 1	Caregiver 2	Caregiver 3	Caregiver 4	Caregiver 5	Caregiver 6	Caregiver 7
Grand Total	174.0	4.0		0.5		15.0	20.0	3.0
Null								
CAREGIVER CANCELLED - REPLA..	4.0							
CLIENT CANCELLED - APPOINTMENT/FAM..	144.0	4.0		0.5		15.0	15.0	2.0
CLIENT CANCELLED - FINANCIAL CONCER..	8.0							

Shows the Zero Claim Hours by Caregivers based on selected date range

