

# TruChart Reporting Basics

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09/29/2023



# Agenda

Smart Table Navigation

Reporting Favorites

Conclusion

# Smart Table Navigation

- Sort in ascending or descending order

Actions	Refresh Data	< 1 2 3 ... 1286 >	View: None Selected
<input type="checkbox"/> Rows: 25,709	Participant	Form Template	Form Template Category
		Created Date Time	

- Multiple filter options – Single Select, Multi-Select, Date Ranges, Free Text/“Contains”

<input type="checkbox"/> Rows: 42 View Selected <input type="checkbox"/>	Participant	Current Enrollment Status [ Approved, Ready For Termination ]	Active [ Y ]	Problem Name [ Diab ]	Start Date [ On or before 01/01/2021 ]
<input type="checkbox"/> Action	ZORET, RICHARD (782)	Approved	Y	Diabetes with other specified manifestations	08/17/2012
<input type="checkbox"/> Action	WILLIAMS, MARY ANN (364)	Approved	Y	Diabetes Type II Participant with poor cont...	06/04/2012

- Customize columns on your table

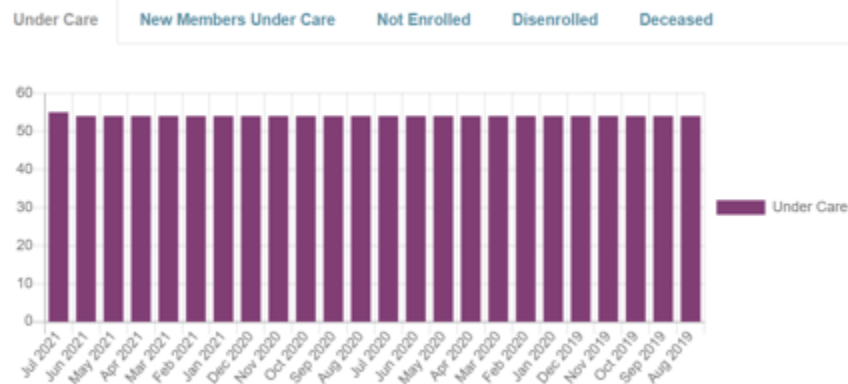
Columns (18)	Records per page
<input type="checkbox"/> Program	
<input type="checkbox"/> Last Name	
<input type="checkbox"/> First Name	
<input type="checkbox"/> Account Number	
<input checked="" type="checkbox"/> Participant	
<input type="checkbox"/> Membership State	
<input type="checkbox"/> Branch	
<input type="checkbox"/> Team	
<input checked="" type="checkbox"/> Current Enrollment Status	
<input checked="" type="checkbox"/> Problem Order	

- Toggle “View Selected”
  - Utilize check boxes and view only selected rows

<input checked="" type="checkbox"/> Rows: 2 View Selected <input checked="" type="checkbox"/>	Participant
<input checked="" type="checkbox"/> Action	ANDERSON, JOYCE (TEST2DNW :)
<input checked="" type="checkbox"/> Action	ARNOLD, GEORGE (TEST1234)

# Smart Table Navigation - Continued

- Re-arrange columns in your preferred order
- Download to excel – downloads as displayed on the smart table
- Save your own custom views or share them with your organization
- Expand rows to view more details
- Embedded charts



Rows: 2	Participant	Plan Enrollment Status	Expected Enrollment Date	Gender
Action	ANDERSON, ANDREW (MN11227)	Approved	07/01/2021	F

Details Outreach Documents Assessments

### Referral Info

**Referral Date:** 05/04/2021

**Participant:** ANDERSON, ANDREW (MN11227)

**Referral State:** Closed

**Medicaid Number:** 123456789

**Medicare Number:** 123A456B85

**Plan Assigned Date:** 07/15/2021

### Referral Source

**Name:** Dr. Mediture      **Type:** Primary Care Provider

**Address:**      **City:**      **State:**

**Email:**      **Fax:**      **Identification Code:**

Eligibility

# Favorite Reports: How to Use Them and Where They Live

## Form Reports

- **Location:** Care Management > Form Reports
  - Forms
    - Pull all forms in system by Template, Signed/Not Signed, Amended, Created date, and Form Template Category
    - Useful for auditing and finding data quickly
  - Requisitions
    - See all Ctd Service and Procurement Requisitions in the system
    - Filter by Status, Vendor, Participant, Reporting Type/Specialty, and Units Fulfilled
    - Useful for Order Tracking – closing the loop and following up with vendors



# Favorite Reports: How to Use Them and Where They Live

## Form Reports

- **Location:** Care Management > Form Reports
  - Encounters
    - See all encounters in the system
    - Filter by Encounter Type, Provider, Encounter Reason, Charge Ticket, Encounter Status
    - Useful for auditing and telehealth



# Favorite Reports: How to Use Them and Where They Live

## LIFEplan Problems

- **Location:** Care Management > Patient
  - See all LIFEplan problems
  - Filter by Active status
  - Filter by Participant Enrollment status
  - Filter by problem name to help determine if ICD-10 codes have been added
  - Determine active Dx with your current population – e.g., how many of my participants have Diabetes?





# Favorite Reports: How to Use Them and Where They Live

## Memberships

- **Location:** Care Management > Patient
  - 78 columns available
  - Demographic data
  - Enrollment data
  - Admission Summary data
  - Default Pharmacy – New





# Favorite Reports: How to Use Them and Where They Live

## Orders/Authorizations/Requisitions Report

- Location: Utilization Management > Reports > Order Authorization
  - Includes data related to the Order, Authorization, and Requisition
  - Use to close the loop from order through service provided
  - Helpful for CMS monitoring report



# Favorite Reports: How to Use Them and Where They Live

## Admit Reports

- **Location:** Care Management > Admit Reports
  - Emergent Visits, Hospitalizations, and Extended Care
  - Filter by Vendor, Admission date, Participant
  - View by Participant or Summary of Total Population
  - Discharge disposition – e.g., how many Emergency Room visits resulted in participant discharge home vs LTC or Hospital, etc.





# Thank you!



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