

PI – Performance Tracking and Dashboards

Purpose:

1. The purpose of this standard operating procedure (SOP) is to provide guidance on updating the MCP performance tracking spreadsheet and the creation of the dashboards. While the performance tracking spreadsheet is not part of the monthly deliverable or utilized for any reporting purposes, it houses the information used to create the monthly dashboards.

Identification of Roles:

RACI Definitions	
RACI - RACI charts are a type of responsibility assignment matrices in project management. These simple spreadsheets or tables highlight the different states of responsibility a stakeholder has over a particular task or deliverable and denotes it with the letters R, A, C, or I.	
(R)	Responsible
(A)	Accountable
(C)	Consulted
(I)	Informed

MCO Oversight Specialist - responsible for keeping the spreadsheet up to date and utilizing it for creating the dashboards. Also responsible for submitting the dashboards to Iowa Medicaid for the monthly deliverables and attaching each of the MCP's dashboards to the monthly I:I meeting invite. **(R, A)**

Iowa Medicaid Program Integrity Unit - responsible to review and provide feedback on the monthly dashboards. **(C, I)**

Managed Care Reporting and Oversight Bureau – responsible to review and provide feedback on the monthly dashboards. **(C, I)**

Performance Standards:

N/A

Path of Business Procedure:

1. The MCPs submit their monthly reports to IMPA.
2. The MCO Oversight Specialist pulls down those reports and stores them in the appropriate MCP folders in the MCO-DBM Information folder located here: <\\dhsime\PI\MCO\MCO-DBM Information>

3. The Performance Tracking Spreadsheet is located within the monthly folder that houses the dashboards: [\\dhsime\PI\MCO\Administration\Reports\Monthly Reports.](#)
4. To update the Performance Tracking Spreadsheet, perform the following steps utilizing the monthly PI reports, specifically P11-PI3:
 - a. Add the number of tips by the reporting month by filtering column F “Date Tip Received” for the reporting month on the monthly report tab P11.
 - b. Add the number of investigations opened for the reporting month by filtering column N “Date Investigation Started” on the monthly report tab P11.
 - c. Add the number of closed investigations for the reporting period by filtering column T “Date Investigation Closed” for the reporting month on tab P11.
 - d. Add the monthly backlog of total cases open by filtering out the cases that have been closed on column T “Date Investigation Closed” and then filtering for anything that has a start date in column N “Date Investigation Started” on the P11 tab.
 - e. Add the number of provider notices submitted during the reporting month by filtering column F “Date FWA Provider Notice Sent” on the PI2 tab.
 - f. For the columns on the performance tracking spreadsheet, “Iowa Medicaid Reject,” “MFCU Opened,” and “MFCU Declined,” this is found by filtering column H “MFCU Disposition Date” on the PI2. The disposition is in column G.
 - g. Add the number of overpayment letters sent by filtering column E “Date Overpayment Letter was Sent to Provider” by the reporting month on the PI3 tab.
 - h. Add the dollar amount of overpayment identified in association with the overpayment letters sent by keeping the filter on the date that the overpayment letter was sent and obtaining the sum of the “Actual Overpayment Amount to be Recovered” on the PI3 tab.
 - i. Add the dollar amount recovered during the reporting month by highlighting column J “Payment Received this Month” on the PI3 tab.
 - j. In order to obtain the open tips by month, the column L “Tip Vetting Status” will be filtered to show anything open. From there, filtering by column F, “Date Tip Received,” will show the specific number for each month on the P11 tab.
 - k. In order to obtain the open investigations by month, the column Q, “Investigation Status” will be filtered to show anything new or open. From there, filtering by column N, “Date Investigation Started,” will show the specific number for each month on the P11 tab.
5. Update each of the graphs within the Performance Tracking Spreadsheet for use in the monthly dashboards.
6. Once the performance tracking spreadsheet is current, the dashboard can be created the information present.
7. When updating the dashboard, copy and paste the folder with the dashboards from the previous month.
8. The folder name will be updated to the current month and year (for example, update the format from YYYY-01 – Copy to YYYY-02).

9. As the MCP specific dashboards are updated to the current month, change the month and year in the document name to the reporting month.
10. Update the month and year as needed in the title on the right side of the document “Iowa Medicaid Program Integrity MCO Dashboard Report – Month YYYY”
11. For medical MCPs, the enrollment information will also need to be updated. Every month, this information is saved in an associated folder where the information is present (Counts). This is completed by adding the Medicaid and IHAWP totals for the specific medical MCP for the reporting month. The enrollment date will also be updated to reflect the last day of the reporting month.
12. From the performance tracking spreadsheet, all the charts will be created. When creating the charts, make sure to include the current and previous year, totals, data table, and change the color to blue for medical MCPs and orange for dental MCPs. Please make sure to remove the legend. This information is specific to the “Tips Received,” “New Investigations Opened,” “FWA Provider Notices,” “Closed Investigations,” “Overpayment Letters Sent by Month,” and “Overpayment Collected by Month” charts.
 - a. Make sure that all axis numbers are whole numbers.
 - b. Make sure that titles are in **bold**.
13. For the “Open Tips by Month” and “Open Investigations by Month,” these charts are created separately. These charts will have:
 - a. No information from the previous year
 - b. No data table, but instead, has data labels **bolded**.
14. Prior to saving and sending this information, make sure to complete the following:
 - a. All charts end on the same month, which is the reporting month.
 - b. All charts are the same size and color.
 - c. Review to determine if the numbers look drastically different from the previous year.

Forms/Reports:

Dashboards

Performance Tracking Spreadsheet

Monthly reports are stored here (PII-PII4):

AGP: <\\dhsime\PI\MCO\MCO-DBM Information\AGP\Monthly Reports>

DDIA: <\\dhsime\PI\MCO\MCO-DBM Information\Delta Dental\Monthly Reports>

ITC: <\\dhsime\PI\MCO\MCO-DBM Information\ITC\Monthly Reports>

MCNA: <\\dhsime\PI\MCO\MCO-DBM Information\MCNA\Monthly Reports>

Performance Tracking Spreadsheets and Dashboards are stored here:

<\\dhsime\PI\MCO\Administration\Reports\Monthly Reports\2023-05>

Counts are stored here: <\\dhsime\PI\MCO\MCO-DBM Information\Counts>

Interfaces:

Microsoft Office

IMPA

Attachments:



FINAL Delta Dental of
Iowa PI1-PI7_ProgramDashboard - March 2(Tracking Spreadsheet



DeltaDental-PI



MCO Performance



MCO counts
2023-03.xlsx