

streamline HEALTH[®]

My eValuator User Guide



StreamlineHealth.net

streamline HEALTH®

These materials contain proprietary and confidential information of Streamline Health (and its affiliates and/or licensors). Unauthorized reproduction, distribution, or transfer of these materials, or any portion of them, is strictly prohibited. Streamline Health and its affiliates and their licensors reserve all rights, title and interest in these materials, their respective services and solutions and all associated marks, logos and other such designations as well as all copyright, trade secret and other intellectual proprietary rights in the foregoing granted under applicable law.

This includes, without limitation, the following trademarks of Streamline Health Solutions, Inc. or its affiliates (and any associated designs, logos, and styling): Streamline Health®, Streamline Health® eValuator™ and Streamline Health® Coding Audit Services™. It also includes, without limitation, all trademarks and other such marks of Streamline Health and its affiliates' licensors, which are used in these materials for designation purposes with permission.

These materials are provided for reference purposes. Nothing contained in these materials is intended to establish neither any agreement or arrangement, or commitment to enter into any agreement or arrangement, nor to alter or modify any existing agreement or arrangement unless specifically stated otherwise in the terms and conditions of the license and/or services agreement between your institution and Streamline Health. Furthermore, these materials relate directly to Streamline Health and its products, services and solutions. If use of any third-party software, services, networking or communication channels or other such third-party solutions is required (e.g., Microsoft® Windows® operating systems, server and PC hardware, data communication lines and internet access lines), you should reference the specifications, documentation and materials for that third-party solution in addition to these materials.

Streamline Health, Inc.

2400 Old Milton Parkway, #1353

Alpharetta, GA 30009

Phone: 1-800-878-5269

mysupport@streamlinehealth.net

Version #	Revision Date	Reason
1.0	4/23/2024	Initial version

TABLE OF CONTENTS

MY EVALUATOR HOMEPAGE	5
NUMBER CARD WIDGET	5
<i>Number Card Drill-through Grid</i>	5
ENCOUNTER LIST WIDGET	6
CUSTOMIZING YOUR HOMEPAGE	7
<i>Default Widgets by Role</i>	7
<i>Adding and Removing Widgets</i>	14
<i>Client and/or Facility filtering</i>	16
<i>Customizing the Encounter List grid</i>	17
<i>Customizing the Number Card Drill-through Grid</i>	21
HOMEPAGE HEADER	27
<i>Streamline Health Logo</i>	27
<i>eValuator drop-down options</i>	27
<i>Coding</i>	29
<i>Dynamic List</i>	30
<i>Reports</i>	30
<i>Encounter Search</i>	30
<i>User Icon</i>	34

MY EVALUATOR HOMEPAGE

Welcome to the new and improved eValuator homepage, My eValuator!

With My eValuator, users can efficiently prioritize audits, manage their workload effectively, and access real-time insights tailored to their preferences, enhancing efficiency and decision-making in audit management processes. From your new homepage, you can focus on the data that is most important to you through the use of widgets. Widgets are loaded to your profile by default based on your user role. Additionally, you can add and remove them as you prefer. You can also reorder the view of widgets on your homepage. Currently, there are two widget types: Number Card and Encounter List Widgets.

The screenshot displays the 'My eValuator' homepage. At the top, there are navigation links for 'Coding', 'Dynamic List', and 'Reports', along with a search bar for 'Encounter Number'. A 'CUSTOMIZE' button is visible in the top right. Below the navigation, there are seven widgets:

- Encounters Awaiting Co...:** Q2 Last Year, 7
- My Audits with Any Chan...:** Last Year, 38
- My Audits with Outstandi...:** Q1 Last Year, 0
- My Completed Audits:** All, 91
- My DRG Changes:** Last Year, 5
- My Encounters Awaiting ...:** Custom (03/02/2023 - 12/31/2023), 8
- My Total Reimbursement...:** All, \$3,910

Below the widgets is a section titled 'Encounters Assigned to Me' with 'SAVE GRID' and 'RESET' buttons. It contains a table with the following columns: Encounter, Workpool, Audit Type, Service Type, Stage, Total Charges, Coder, Auditor, Audit Complet..., and Assi. The table lists several encounters with their respective details.

Encounter	Workpool	Audit Type	Service Type	Stage	Total Charges	Coder	Auditor	Audit Complet...	Assi
Martie99222	Pre-bill OP Audits	PreBill	PROFEE	Manager	\$100.00			02/22/2022	Megi
Martie99223	Pre-bill OP Audits	PreBill	PROFEE	Manager	\$100.00			02/22/2022	Megi
mz101052024	Pre-bill Audits	PreBill	IP	Audit	\$1,200.00			02/29/2024	Megi
6A9DC3AA0A	Retro IP	PostBill	IP	Audit	\$3,460.00				Megi
Demo_125345	Pre-bill PROFEE Audits	PreBill	PROFEE	Coder	\$100.00			08/16/2023	Megi
AdmSource1923	Pre-bill Audits	PreBill	IP	Audit	\$1,001.00				Megi
SM152023777	Pre-bill PROFEE Audits	PreBill	PROFEE	Audit	\$1,200.00				Megi
ADMT_S4	Pre-bill Audits	PreBill	IP	Audit	\$22,000.00				Megi
ATAS11123	Pre-bill Audits	PreBill	IP	Manager	\$1,001.00			02/15/2023	Megi

At the bottom of the table, there is a pagination control showing '10 items per page' and '1 - 10 of 139 items'.

NUMBER CARD WIDGET

Number Card widgets will give you a summary (count, percentage, and/or dollar amount) based on encounter data. The data is pulled based on a date you select or preset in the widget. Additionally, you can click on the number displayed on the number card to launch a drill-through screen to see all the encounters and their associated information that make up this summary number.

Number Card Drill-through Grid

- The drill-through grid can be customized per widget!
- The drill-through can be opened by clicking on the Number itself.

Note: it will change to a blue color, and your mouse pointer will change to a hand to indicate you can click on it

- The drill-through can also be opened in a new tab by clicking the pop-out indicator in the lower right-hand corner of the number card.

- By default, the encounter list widget will show the following columns:

- Encounter Number
 - Hyperlinked to open the encounter in a new tab.

Note: this column is in blue, which indicates it is “locked” and will hold its position as you scroll horizontally.

- Workpool
- Audit Type
- Service Type
- Stage
- Total Charges
- Coder
- Auditor
- Audit Complete Date
- Assigned To
- Import Date
- Discharge Date
 - The default sort is descending on the grid.
- Requires Further Review
- Financial Impact
- Facility Name

ENCOUNTER LIST WIDGET

Encounter List widgets list encounters in a grid format on your homepage.

- The encounter list grid can be customized per widget!
 - By default, the encounter list widget will show the following columns:
 - Encounter Number
 - Hyperlinked to open the encounter in a new tab.

Note that this column is blue, which indicates it is “locked” and will hold its position as you scroll horizontally.

- Workpool
- Audit Type
- Service Type
- Stage
- Total Charges
- Coder
- Auditor
- Audit Complete Date
- Assigned To
- Import Date
- Discharge Date
 - The default sort is descending on the grid.
- Requires Further Review
- Financial Impact
- Facility Name

CUSTOMIZING YOUR HOMEPAGE

You can customize your homepage to accommodate your needs and wants!

Default Widgets by Role

With the new homepage, your role in the system determines the widgets displayed on your homepage by default. Widgets are shown alphabetically and by logged-in user’s role. Since multiple role assignments are allowed within eValuator, below is the role hierarchy that the default widgets will be applied if a user were to have multiple roles assigned:

1. Service Admin
2. Auditor
3. Manager
4. Coder-Client
5. Client

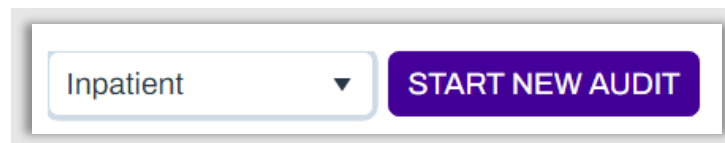
Many widgets offer the flexibility to select dates, allowing users to refine their search results as required. However, certain widgets have predetermined date limitations set by Admin users, which are indicated by the absence of the date picker dropdown.

Note: Currently, users can have up to 8 widgets on their homepage.

Auditor – Start New Audit

Start New Audit button

Any user with an Auditor role assigned will see a button at the upper lefthand corner of the homepage labeled “Start New Audit.” The Start New Audit button will open the next available encounter to audit for the user based on the prioritization set up by administrators. Upon opening the encounter via the Start New Audit button, the encounter will be automatically assigned to the user. If no available encounters are found, a message will be given to alert the user that there are no available encounters found. The service type drop-down will hold the previous selection and be set as Inpatient by default.



Note: Users may need to allow pop-ups on their browser for eValuator so that the Start New Audit feature can work fully.

Start New Audit Configuration

The Start New Audit pulls the first available encounter that is:

1. Prebill
2. Unassigned
3. Audit Stage
4. Workpool(s) assigned to logged-in user.

Additionally, there is a prioritization that administrators can configure per facility and service type (inpatient, outpatient, and profee). This setting is located under the Facility>Getting Started page. By default, the configuration is set to pull the highest RFR%. The options can be enabled and then dragged into the best order. The sort can also be changed from ascending to descending per criteria. One criterion must always be enabled. The configuration is saved automatically each time a change is made.

- Workpool Prioritization (configurable by facility):
 - Workpool Priority, with audits in high priority workpools receiving precedence.
 - Rule Estimated Financial Impact
 - Requires Further Review %
 - Total Charges
 - Days Past Import
 - Days Until Auto-Release
 - Days From Discharge

Note: If the user is assigned to multiple facilities, it will pull an encounter based on one facility's criteria and apply it to all to find the highest-ranked encounter available to audit.

Auditor Widgets

- Encounters Assigned to Me—This encounter List widget type shows a list of encounters currently assigned to you that are not within a complete stage. **Default**
- My Open Queries- Number Card widget type that shows a count of encounters where the audit is incomplete, the logged-in user is the auditor of record, and a query exists on a procedure, diagnosis, or discharge disposition. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Awaiting Coding Changes- Number Card widget type shows a count of encounters where the audit is incomplete, the logged-in user is the auditor of record, and Awaiting Coding Change is True. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Awaiting Coding Change is a setting that not all users will have enabled. It is on the Facility>Edit page and is labeled “Move Coder Agreed Encounter to Complete On Resubmission.”
- My Completed Audits- Number Card widget type that shows a count of encounters where the audit is completed by the logged-in user.
 - This widget contains a limited date range and will not display a date picker drop-down.
- My DRG Changes- Number Card widget type that shows a count of encounters where the audit is completed by the logged-in user and there was a change on either MS-DRG, APR-DRG, SOI (Severity of Illness), or ROM (Risk of Mortality).
- My MS-DRG Changes- Number Card widget type that shows a count of encounters where the audit is completed by the logged-in user, and there was a change on the MS-DRG.
- My APR-DRG Changes- Number Card widget type that shows a count of encounters where the audit is completed by the logged-in user and there was a change in either the APR-DRG, SOI, or ROM.
- My Total Variance- Number Card widget type that shows a monetary amount of all completed audits by the logged-in user where the reimbursement variance is greater than or less than zero. **Default**
- My wRVU Changes- Number Card widget type that shows a count of all completed profee audits by the logged-in user that had a change to wRVU.
- My APC Changes- Number Card widget type that shows a count of all completed outpatient audits by the logged-in user that had a change in the APC Reimbursement.

- My Audit Change Rate- Number Card widget type that shows a percentage of completed audits by the logged-in user that had a change made from their entire completed encounters. **Default**
- My Audits with Changes- Number Card widget type that shows a count of completed audits by the logged-in user that had a change made.
- My Total Charges Held- Number Card widget type that shows a sum of encounter charges from encounters where they are assigned to the logged-in user and are not complete. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Mortality Audit Needed- Number Card widget type that shows a count of unassigned encounters within the Audit stage, and the Final Discharge Disposition is 20 (Expired).
 - This widget contains a limited date range and will not display a date picker drop-down.
- PSI/HAC Audit Needed- Number Card widget type that shows a count of encounters that are unassigned, within the Audit stage, and hits at least one rule that starts with PSI or HAC.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: The data source used in this widget does not have a date type filter. If this widget is modified to select a non-limited date, or if a new widget is built with the data source “PSI or HACs Awaiting Audit” using a non-limited date, the date range picker will display but will NOT impact the results returned.
- AutoReleasing-IP- Number Card widget type that shows a count of prebill, inpatient, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page
- AutoReleasing-OP- Number Card widget type that shows a count of prebill, outpatient, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page
- AutoReleasing-Profee- Number Card widget type that shows a count of prebill, profee, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page

Coder Widgets

- Encounters Assigned to Me- Encounter List widget type that shows a list of encounters currently assigned to you that are not within a complete stage. **Default**
- Encounters Coded by Me- Number Card widget type that shows a count of encounters where the logged-in user is the coder of record. **Default**

- My Average Coded- Number Card widget type that shows an average of encounters coded by the logged-in user per day. **Default**

Note: Average is taken based on dates where at least one encounter is completed.

Manager Widgets

- Encounters Assigned to Me- Encounter List widget type that shows a list of encounters currently assigned to you that are not within a complete stage. **Default**
- Manager Rebuttals-IP- Number Card widget type that shows a count of inpatient encounters that reside in the Manager stage without a reserved to user. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Manager Rebuttals-OP - Number Card widget type that shows a count of outpatient encounters that reside in the Manager stage without a reserved to user. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Manager Rebuttals-Profee- Number Card widget type that shows a count of profee encounters that reside in the Manager stage without a reserved to user. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- AutoReleasing-IP- Number Card widget type that shows a count of prebill, inpatient, unassigned, and unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page

- AutoReleasing-OP- Number Card widget type that shows a count of prebill, outpatient, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page

- AutoReleasing-Profee- Number Card widget type that shows a count of prebill, profee, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page

Service Admin Widgets

The Service Admin widgets differ from other roles in that they utilize facility data rather than individual user data. The facility information is pulled based on the logged-in user's access level.

- Encounters Assigned to Me- Encounter List widget type that shows a list of encounters currently assigned to you that are not within a complete stage. **Default**

- Encounters Held –IP- Number Card widget type that shows a count of prebill, inpatient encounters (active facilities only) that are held awaiting an audit.
 - This widget contains a limited date range and will not display a date picker drop-down.
- Encounters Held –OP- Number Card widget type that shows a count of prebill, outpatient encounters (active facilities only) that are held awaiting an audit.
 - This widget contains a limited date range and will not display a date picker drop-down.
- Encounters Held –Profee- Number Card widget type that shows a count of prebill, profee encounters (active facilities only) that are held awaiting an audit.
 - This widget contains a limited date range and will not display a date picker drop-down.
- Total Charges Held–IP- Number Card widget type that shows a sum of charges from prebill, inpatient encounters (active facilities only) that are held awaiting an audit. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Total Charges Held –OP- Number Card widget type that shows a sum of charges from prebill, outpatient encounters (active facilities only) that are held awaiting an audit. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- Total Charges Held –Profee- Number Card widget type that shows a sum of charges from prebill, profee encounters (active facilities only) that are held awaiting an audit. **Default**
 - This widget contains a limited date range and will not display a date picker drop-down.
- DRG Accuracy- Number Card widget type that shows a percentage of inpatient, complete audits that had did not have a change to the MS-DRG, APR-DRG, SOI, or ROM out of their entire completed encounters.
 - The drill through data will show those that did have a change.
- MS-DRG Accuracy- Number card widget type that shows a percentage of inpatient, complete audits with a financial category grouper type =CMS, which did not have a change to the MS-DRG out of their entire completed encounters.
 - The drill through data will show those that did have a change.
- APR-DRG Accuracy- Number card widget type that shows a percentage of inpatient, complete audits with a financial category grouper type=APR, which did not have a change to the APR-DRG, SOI, or ROM out of their entire completed encounters.
 - The drill through data will show those that did have a change.
- APC Accuracy- Number card widget type that shows a percentage of outpatient, complete audits that did not have a change in reimbursement variance out of their entire completed encounters.
 - The drill through data will show those that did have a change.
- Variance Total-IP- Number Card widget type that shows an absolute value of inpatient, complete audits that had a change in reimbursement. **Default**

- Variance Total–OP- Number Card widget type that shows an absolute value of outpatient, complete audits that had a change in reimbursement. **Default**
- AutoReleasing-IP- Number Card widget type that shows a count of prebill, inpatient, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page
- AutoReleasing-OP - Number Card widget type that shows a count of prebill, outpatient, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page
- AutoReleasing-Profes - Number Card widget type that shows a count of prebill, profes, unassigned, unaudited encounters that are about to be auto-released to billing today.
 - This widget contains a limited date range and will not display a date picker drop-down.

Note: Auto-release criteria are set on the Edit Workpool page
- Audits Held for Query- Number Card widget type that shows a count of encounters that are not in the complete stage but have had an audit completed and that a query exists on either a procedure, diagnosis, and/or discharge disposition.
 - This widget contains a limited date range and will not display a date picker drop-down.
- % of AutoReleased-IP – Number Card widget type that shows a percentage of inpatient encounters that were routed to audit but were not completed or started before they were automatically released to billing out of the total encounters that were routed to audit.
- % of AutoReleased-OP – Number Card widget type that shows a percentage of outpatient encounters that were routed to audit but were not completed or started before they were automatically released to billing, out of the total encounters that were routed to audit.
- % of AutoReleased-Profes – Number Card widget type that shows a percentage of profes encounters that were routed to audit but were not completed or started before they were automatically released to billing, out of the total encounters that were routed to audit.
- wRVU Accuracy – Number Card widget type that shows a percentage of completed profes encounters that did not have a change in wRVU out of the total completed profes encounters.
 - The drill through data will show those that did have a change.

Adding and Removing Widgets

Customize button

To add, remove, or rearrange your widgets, click the customize button at the top right corner of the homepage.

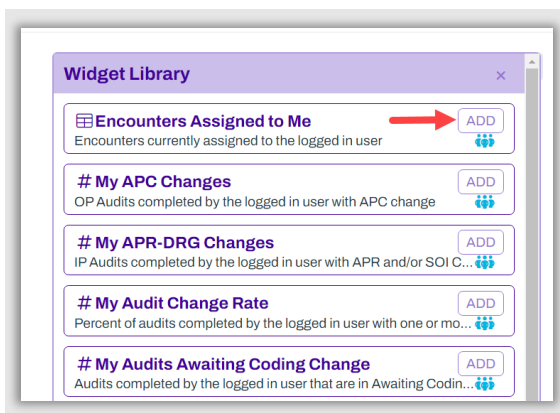


Adding a Widget

Click the Add Widgets button.





Click the ADD button via the Widget Library.





Note: After clicking ADD, the widget will automatically be added to your homepage.

Widget Library

After clicking Add Widgets, the Widget Library is opened. The library shows:

1. The Name of the widget
2. The Description of the widget
3. The icon on the left of the widget name signifies whether the widget is.
 - a. An Encounter List grid widget type: 
 - b. A Number Card widget type: 
4. The Add button

5. Indicator if the widget is public or private

- a. Public icon: 
- b. Private icon: 

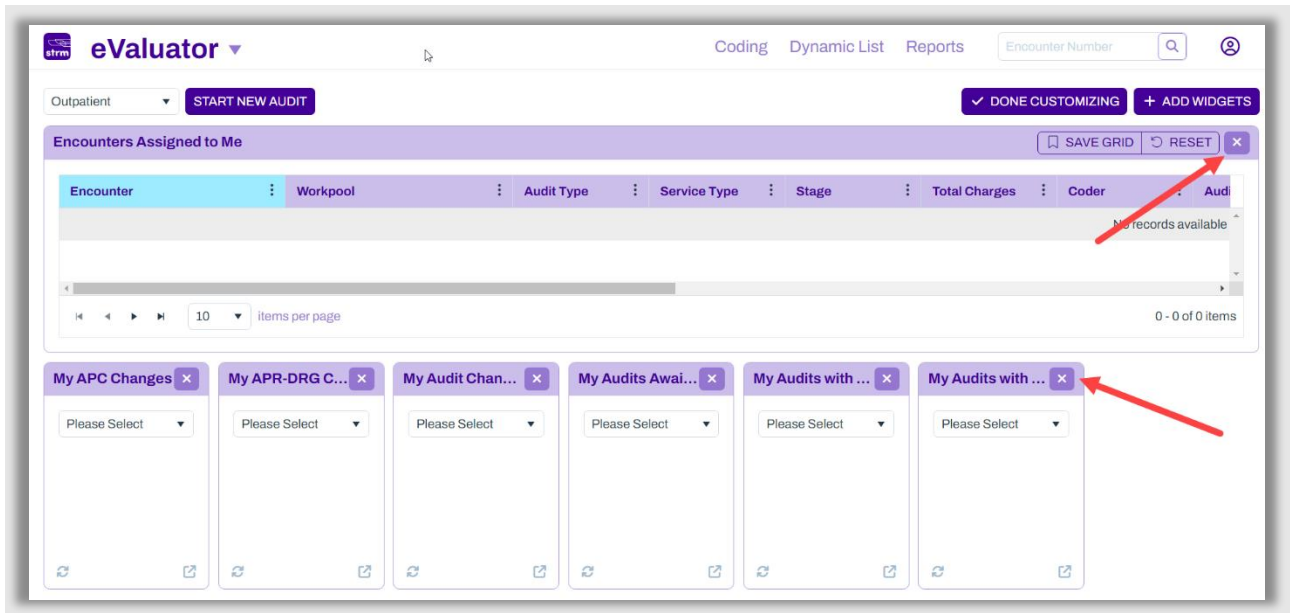
Note: Currently, only Streamline Health Global Admin users can create widgets.

6. Filter by role option

- a. This filter is populated automatically by the logged-in user's role.
 - i. The filter will not be displayed if the user has only an Auditor, QC, Coder, or Manager user role.
 - ii. If the user has multiple roles, widgets associated with multiple roles will show, and the filter will be displayed.

Removing a Widget

After clicking Customize, the widgets have an X button on the upper right-hand corner(s). This X will remove the widget from your homepage. The widget can be added back by following the steps above to add a widget.



Rearranging Widgets

After clicking Customize, the widgets can be moved to various positions to better aid with workflows. Your cursor will show a hand to signify grabbing the widget with your mouse - hold, drag, and drop to relocate.

Client and/or Facility filtering

The data on the homepage is based on users' access levels (Clients and Facilities assigned). By updating the filter, users can modify which Facilities and Clients the widgets are utilizing.



Open the Filter at the top right-hand corner of the homepage (next to Customize)

After clicking the filter, users can see their assigned Clients (if applicable) and Facilities. They can deselect those from which they do not wish to see widget data reported. To apply the changes to the filter, click off the filter, which will close and reload the page with updated information.

Note: The filter selections will hold until it is changed or cleared by a user.

The screenshot shows the eValuator dashboard interface. At the top, there are navigation links for Home, Coding, Dynamic List, and Reports, along with an Encounter Search bar and a user profile icon. Below the navigation, there are tabs for INPATIENT and START NEW AUDIT. The main dashboard area contains four widgets: Encounters Audited (2), Encounters Audited (2), DRG Changes (4), and DD Changes (2). A CUSTOMIZE filter panel is open on the right, showing a list of clients and facilities with checkboxes for selection. Below the widgets is a table titled 'Financial Impact Of Audited Inpatient Grid' with columns for Encounter, Workpool, Audit Type, Service Type, Stage, Total Charges, Coder, Auditor, Audit Complet..., and Assigned To. The table contains 10 rows of data. At the bottom of the table, there is a pagination control showing '1 - 10 of 34 items'.

Encounter	Workpool	Audit Type	Service Type	Stage	Total Charges	Coder	Auditor	Audit Complet...	Assigned To
10252023mz3	Pre-bill Audits	PreBill	IP	Complete	30737.96	Harrison, Jessica	Megan.Zuzak@st...	2023/10/25	
10252023mz	Pre-bill Audits	PreBill	IP	Complete	30737.96	Harrison, Jessica	Megan.Zuzak@st...	2023/10/25	
mz073120232	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/31	Megan.Zuzak@st...
mz007270239	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	
mz007270238	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	
mz007270237	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	
mz007270236	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	
mz007270235	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	
mz007270234	Retrospective	PreBill	IP	Complete	914701.23	CROSS, LISA	Megan.Zuzak@st...	2023/07/27	

Customizing the Encounter List grid

The Encounter List grid can be customized in multiple ways to guarantee users can see data in a way that is most beneficial to their daily workflows.

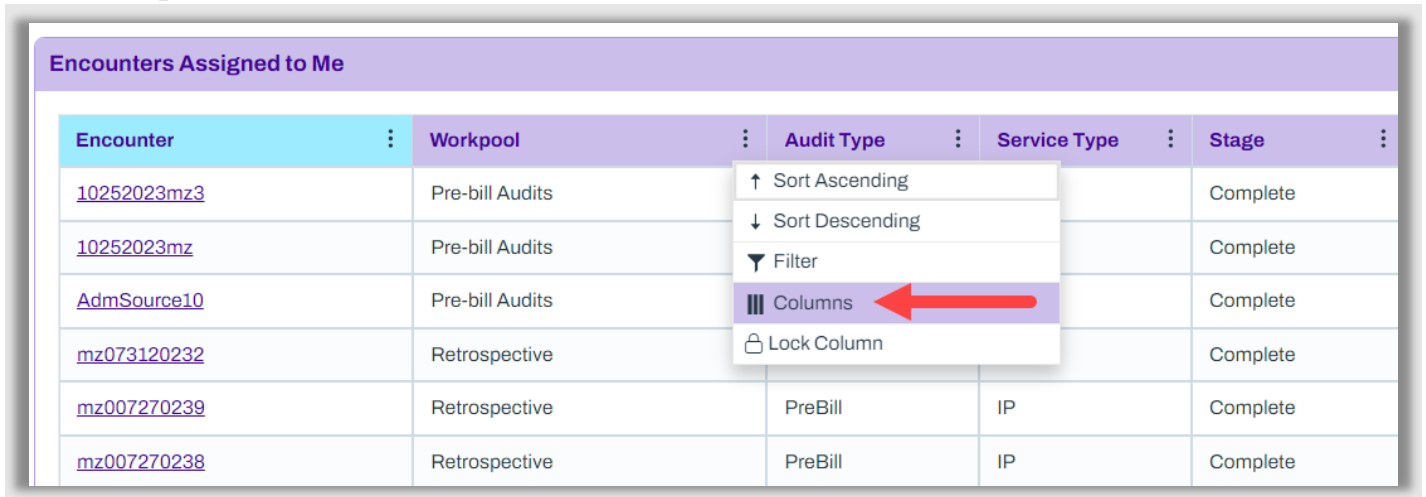
Note: Any user with a coder role will have a different default list of columns shown on the Encounter List widgets.

Clicking the kebob icon (3 dots next to any column header) brings up customization options.



Adding/Removing Columns

After clicking the kebob icon, select the Columns option.



To remove a column, uncheck the purple checkbox and click Save.

To add a column, check the checkbox next to an item and click Save.

Optional Columns

- LOS
- Admit Type
- Awaiting Coding Changes
- Client
- Discharge Disposition (Final)
- Financial Category
- Financial Class
- Hospital Service

- Manager
- Medical Record Number
- Patient Type
- Reimbursement Variance
- Requires Query
- Servicing Provider
- (ORG) DRG

Sorting Columns

The default sort on all Encounter List grids is the Discharge Date (IP/OP)/Date of Service (Profee). Users can modify these two ways:

1. Click the kebob on another column and choose Sort Ascending or Sort Descending.
 - a. Note that an arrow is applied to the header, and the color has changed to a light blue
2. Click the column header.
 - a. Note that an arrow is applied to the header, and the color has been changed to light blue
 - b. Click on the column header again to change it from ascending to descending.
 - c. Click on the column header a third time, and the sort is removed. [OBS]

Filtering Columns

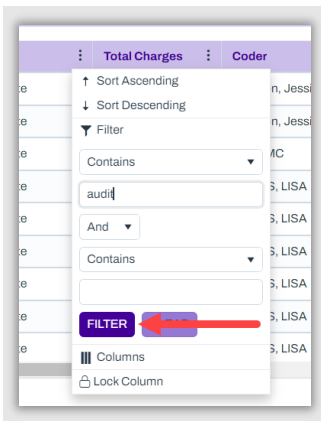
The grid columns can be filtered by selecting the Filter option in the kebob menu.

The screenshot shows the eValuator interface. At the top, there are navigation tabs for Coding, Dynamic List, and Reports, along with a search bar for Encounter Number. Below this is a dashboard with seven summary cards: Encounters Awaiting Co... (7), My Audits with Any Chan... (4), My Audits with Outstandi... (2), My Completed Audits (91), My DRG Changes (5), My Encounters Awaiting ... (8), and My Total Reimbursement... (\$3,910). Below the dashboard is a table titled 'Encounters Assigned to Me'. The table has columns for Encounter, Workpool, Audit Type, Service Type, Stage, Total Charges, Auditor, and Audit Complet... A kebob menu is open over the table, showing options for Sort Ascending, Sort Descending, and Filter. The Filter option is selected, and a filter dialog is open, showing a dropdown for 'Is equal to' and a search input field. The table data includes rows with encounter numbers like 10252023mz3 and 10252023mz, and various audit types and stages.

The filter works the same way existing grid functionality is set up within Classic eValuator. The operators are as follows:

- Contains
- Does-not contain
- Is equal to
- Is not equal to
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

After entering the filter criteria, apply the filter by clicking on Filter.

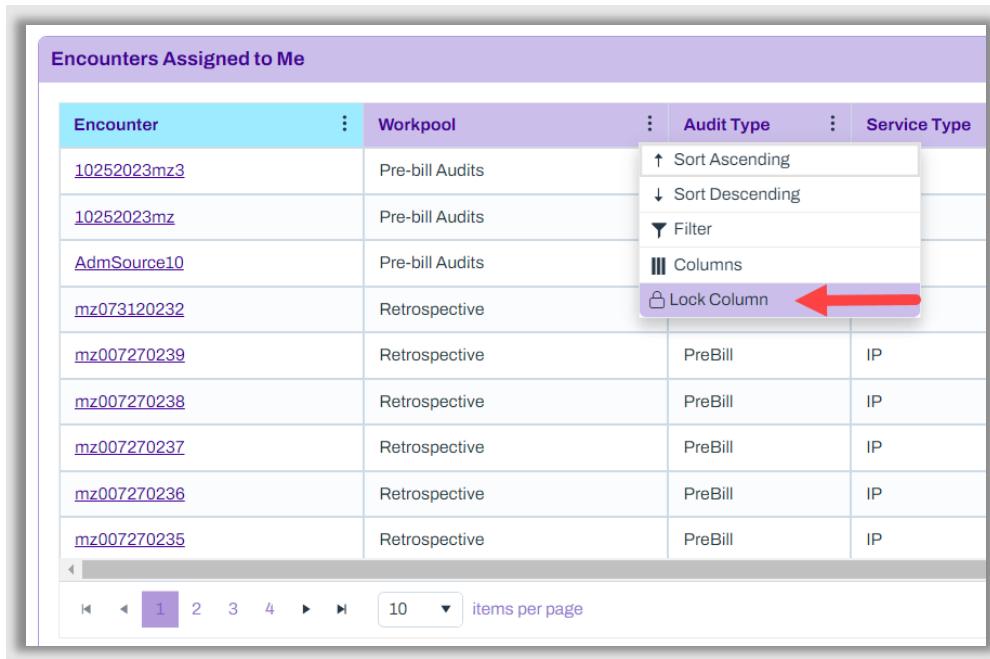


Locking Columns

The Encounter column is also light blue because it is locked by default. Locking a column helps when horizontal scrolling. The data on the grid will continue to scroll; however, once your locked column has hit the left side of the grid (or other columns that may be locked as well), it sticks and does not scroll past that column.

Note: This feature is not available on a coder encounter list.

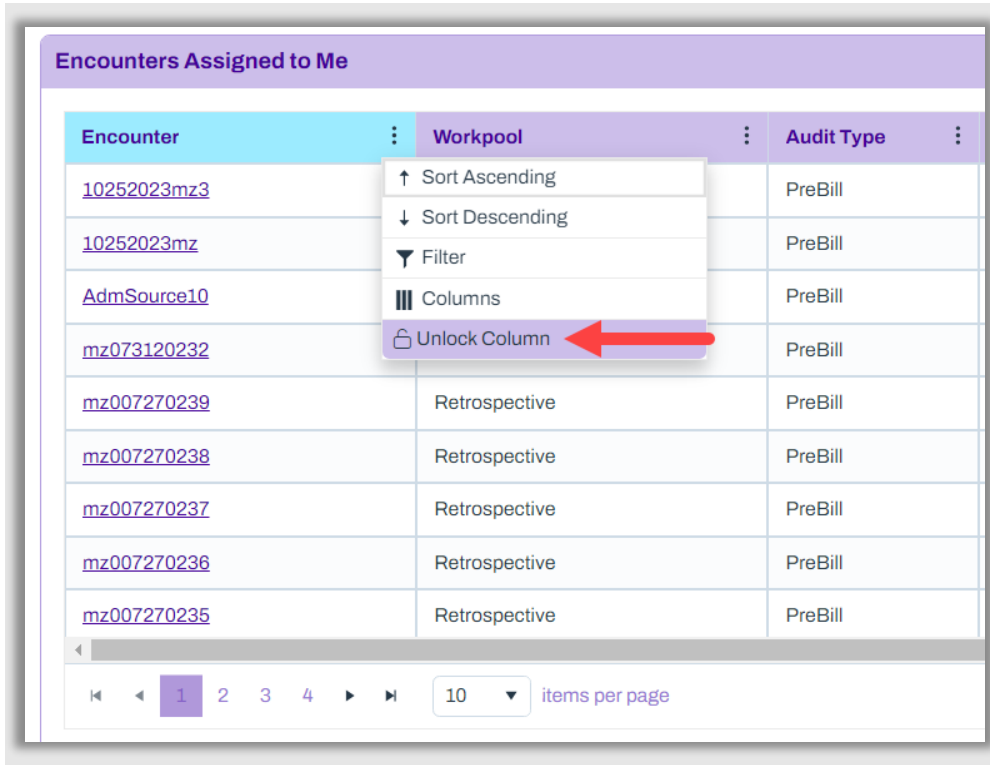
To lock a column, click the kebob on the column header and select Lock Column.



Encounter	Workpool	Audit Type	Service Type
10252023mz3	Pre-bill Audits		
10252023mz	Pre-bill Audits		
AdmSource10	Pre-bill Audits		
mz073120232	Retrospective		
mz007270239	Retrospective	PreBill	IP
mz007270238	Retrospective	PreBill	IP
mz007270237	Retrospective	PreBill	IP
mz007270236	Retrospective	PreBill	IP
mz007270235	Retrospective	PreBill	IP

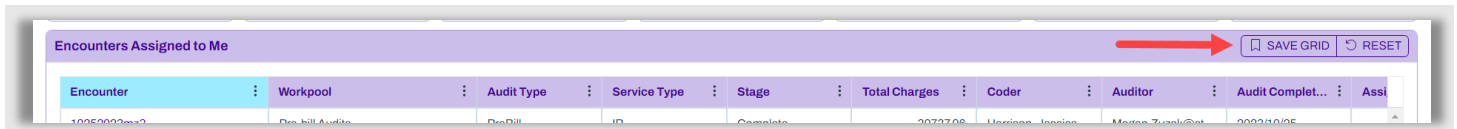
10 items per page

To unlock a column, click the kebob on the column header and select Unlock Column.

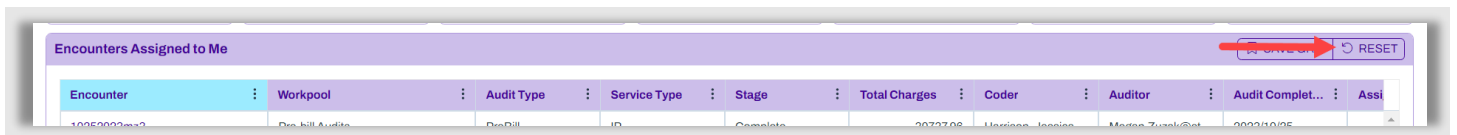


Save Grid/Reset

Users can save their grid customizations by clicking the Save Grid button at the top of the Encounter List grid. Saving the customizations includes locking, sorting, filtering, adding and/or removing columns, and displaying items per page. These customizations are per widget so that users can have several Encounter List grids that display data differently.



Users can reset their grid customization by clicking the Reset button at the top of the Encounter List grid.



Customizing the Number Card Drill-through Grid

The Number card drill-through grid has multiple ways to be customized to guarantee users can see data in a manner that is most beneficial to their day-to-day workflows. If customizations are saved, they are saved per widget.

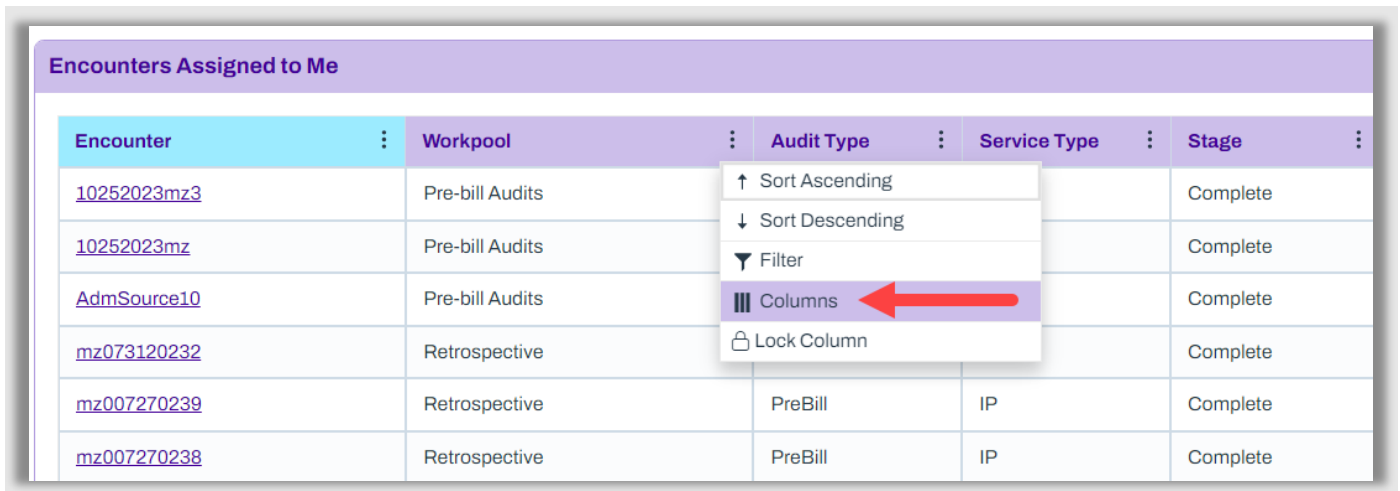
Note: When utilizing the Number Card drill-through popout function, the page header undergoes a slight modification aimed at minimizing confusion when managing work across multiple tabs.

Clicking the kebob icon (3 dots next to any column header) brings up customization options.



Adding/Removing Columns

After clicking the kebob icon, select the Columns option.



To remove a column, uncheck the purple checkbox and click Save.

To add a column, check the checkbox next to an item and click Save.

Note: Any user with a coder role will have a different default list of columns shown on the drill-through for number card widgets.

Optional Columns

- LOS
- Admit Type
- Awaiting Coding Changes
- Client
- Discharge Disposition (Final)
- Financial Category
- Financial Class
- Hospital Service
- Manager

- Medical Record Number
- Patient Type
- Reimbursement Variance
- Requires Query
- Servicing Provider
- (ORG) DRG

Sorting Columns

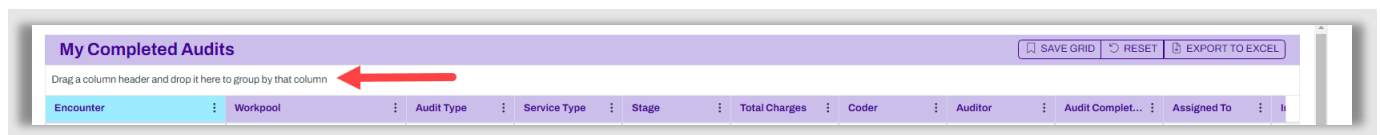
The default sort on all Encounter List grids is the Discharge Date (IP/OP)/Date of Service (Profee). Users can modify these two ways

3. Click the kebob on another column and choose Sort Ascending or Sort Descending.
 - a. Note that an arrow is applied to the header, and the color has been changed to light blue.
4. Click the column header.
 - a. Note that an arrow is applied to the header, and the color has been changed to light blue.
 - i) Click on the column header again to change from ascending to descending.
 - ii) Click on the column header a third time, and the sort will be removed.

Grouping Columns

The Number Card drill-through has a secondary sort function called grouping. This will group items with the same column data together. For example, in classic eValuator, the Workpool Details grid was “grouped” by stage.

To group a column, click the column header and drag it to the top header section that says “Drag a column header and drop it here to group by that column.”



After grouping, the grid is separated into sections and grouped by your different column options.

My Completed Audits SAVE GRID RESET EXPORT TO EXCEL

Stage

Encounter	Workpool	Audit Type	Service Type	Stage	Total Charges	Coder	Auditor	Audit Complet...	Assigned To
▼ Audit									
mz101052024	Pre-bill Audits	PreBill	IP	Audit	\$1,200.00			02/29/2024	
PFSuop2723	Pre-bill PROFEE Audits	PreBill	PROFEE	Audit	\$1,200.00			03/31/2023	
mz030520242	Pre-bill OP Audits	PreBill	OP	Audit	\$1,200.00			03/05/2024	
MZ05222023	Retro IP Rehab	PreBill	IP	Audit	\$30,737.98			05/22/2023	
▼ Coder									
Demo_325345	Pre-bill PROFEE Audits	PreBill	PROFEE	Coder	\$100.00			08/16/2023	
ADMT_S1	Pre-bill Audits	PreBill	IP	Coder	\$20,000.00			05/11/2023	
mz01122024	Pre-bill OP Audits	PostBill	OP	Coder	\$1,200.00			01/12/2024	
ProfeeRule	Pre-bill PROFEE Audits	PreBill	PROFEE	Coder	\$500.00			12/13/2023	
mz030720242	Pre-bill OP Audits	PreBill	OP	Coder	\$1,200.00			03/07/2024	

Filtering Columns

The grid columns can be filtered by selecting the Filter option in the kebob menu.

eValuator Coding Dynamic List Reports Encounter Number SEARCH CUSTOMIZE

Encounters Awaiting Co...	My Audits with Any Chan...	My Audits with Outstand...	My Completed Audits	My DRG Changes	My Encounters Awaiting...	My Total Reimbursement...
Q2 Last Year	Last Year	Q3 Last Year	All	Last Year	Custom 09/27/2023 - 12/31/2023	All
7	4	2	91	5	8	\$3,910

Encounters Assigned to Me SAVE GRID RESET

Encounter	Workpool	Audit Type	Service Type	Stage	Total Charges	Coder	Auditor	Audit Complet...	Ass
10282023mz3	Pre-bill Audits	PreBill	IP	Complete	30737.5		Zuzak@st...	2023/10/25	
10282023mz	Pre-bill Audits	PreBill	IP	Complete	30737.5		Zuzak@st...	2023/10/25	
AdmSource10	Pre-bill Audits	PreBill	IP	Complete	100		Zuzak@st...	2023/08/10	
mz073120232	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/31	Magi
mz072720238	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/27	
mz072720238	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/27	
mz072720237	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/27	
mz072720236	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/27	
mz072720236	Retrospective	PreBill	IP	Complete	914701.1		Zuzak@st...	2023/07/27	

Filter: Is equal to, And, Is equal to, FILTER, CLEAR, Columns, Lock Column

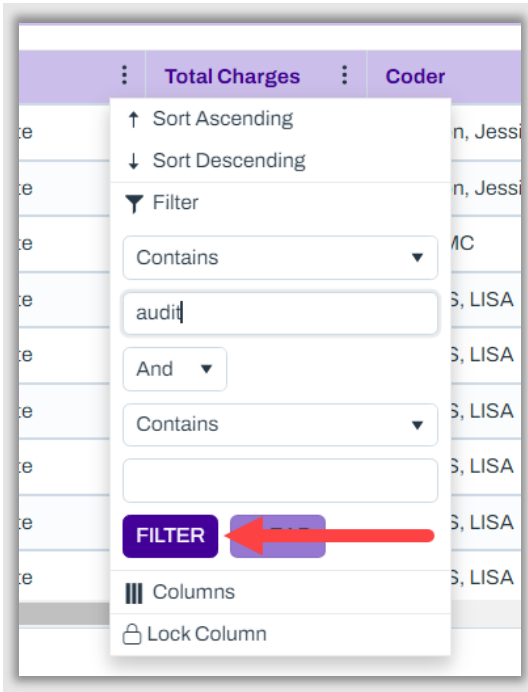
1 - 10 of 36 items

The filter works the same way existing grid functionality is set up within Classic eValuator. The operators are as follows

- Contains
- Does-not contain
- Is equal to
- Is not equal to
- Starts with
- Ends with
- Is null
- Is not null

- Is empty
- Is not empty

After entering the filter criteria, apply the filter by clicking on Filter.

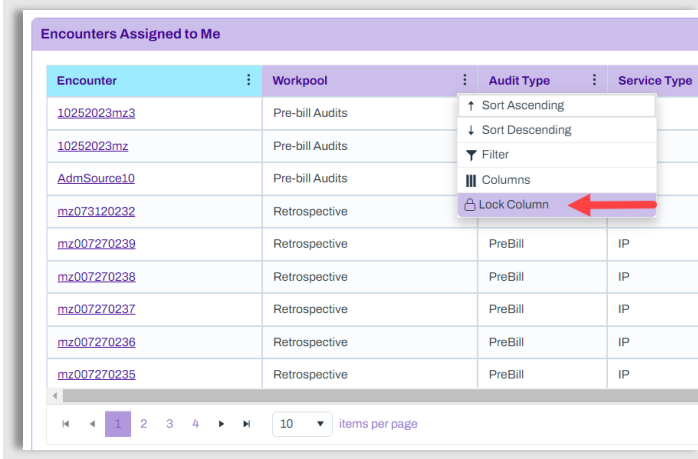


Locking Columns

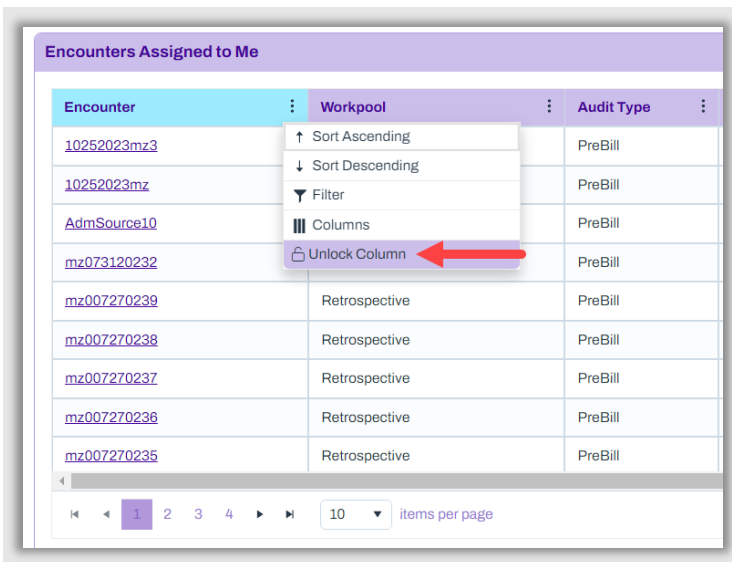
The Encounter column is also light blue because it is locked by default. Locking a column helps when horizontal scrolling. The data on the grid will continue to scroll; however, once your locked column has hit the left side of the grid (or other columns that may be locked as well), it sticks and does not scroll past that column.

Note: This feature is not available on a coder drill-through grid.

To lock a column, click the kebob on the column header and select Lock Column.

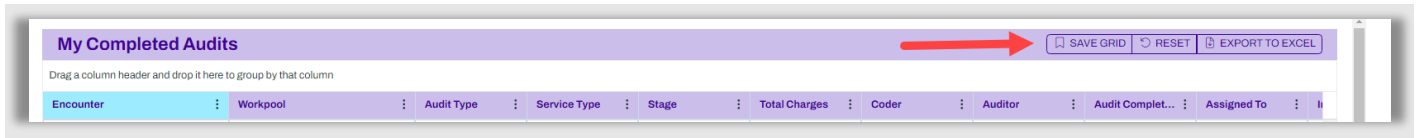


To unlock a column, click the kebob on the column header and select Unlock Column.

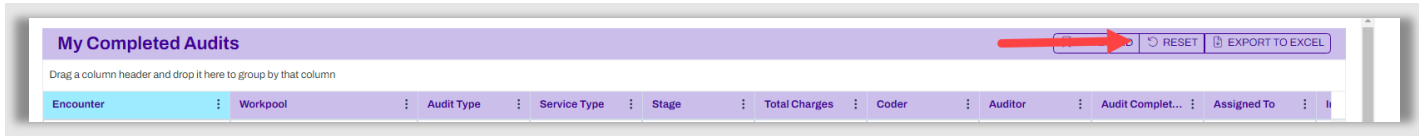


Save Grid/Reset

Users can save their grid customizations by clicking the Save Grid button at the top of the Number Card drill-through grid. These customizations include locking, sorting, filtering, columns added and/or removed, and items per page to display. These customizations are per widget so that users can have several Encounter List grids that display data differently.

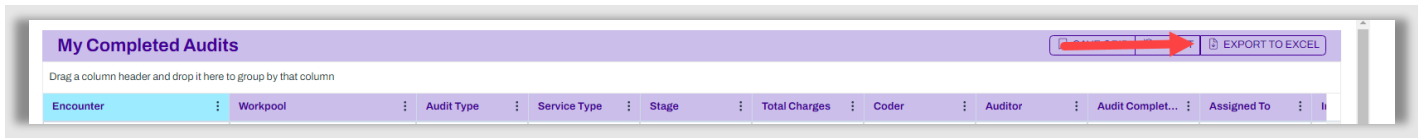


Users can reset their grid customization by clicking the Reset button at the top of the Encounter List grid.



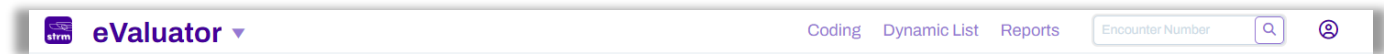
Exporting

The Number Card drill-through grid can be exported to an Excel format. The grid will export based on your customizations to the grid.



HOMEPAGE HEADER

All eValuator page headers are updated with Streamline Health branding.



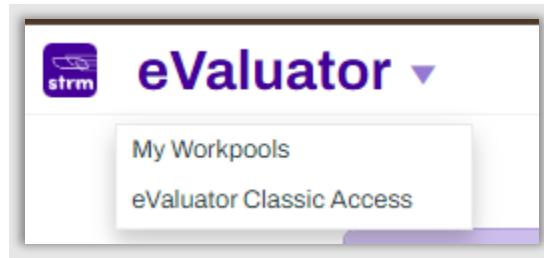
Streamline Health Logo

Click on the Streamline Health Logo from anywhere within eValuator to navigate to your new homepage.



eValuator drop-down options

Click the drop-down list next to 'eValuator' to access your Workpools or classic eValuator.



Note: The My Workpools option is hidden for users with a Coder role and/or the Streamline Health Global Admin user role. The eValuator Classic Access is available to all users.

My Workpools

Users accessing one or more Workpools will find a My Workpools page option under the eValuator drop-down menu.

Click My Workpools to see your Workpools in a new browser tab.

- Opening a new tab allows you to work on your homepage simultaneously.

My Workpools page has three main sections: My Workpool Views, My Workpools, and Facilities.

My Workpool Views

This section contains the list of Workpools within Workpool Views that users can access (either assigned or by role). If no Workpools are assigned, this section will be blank.

Use the filter and sort options on the column headers to adjust how you view your list.

Click the blue Workpool name to open the Workpool.

Note: Workpools can be added to Client Workpool Views by going to the Facility>Getting Started>Workpool page and checking the option “Include in Client Workpool Views.”

Workpool View	Service Type	Facility Count	Remaining	Total
123WPool	PROFEE		1	5
IP	INPATIENT		1	205
IP Rehab	INPATIENT		1	4
OP BDO	OUTPATIENT		1	2
OP ER	OUTPATIENT		1	11
Pre-bill Audits	INPATIENT		1	120
Pre-bill OP Audits	OUTPATIENT		2	162
Pre-bill PROFEE Audits	PROFEE		1	305
Retro OP ER	OUTPATIENT		1	18

My Workpools

This section contains the list of Workpools the user can access (either assigned or by role). If no Workpools are assigned, this section will be blank.

Use the filter and sort options on the column headers to adjust how you view your list.

Click the blue Workpool name to open the Workpool.

Facility	Work Pool	Type	Remaining	Total	Due Date
Eastbrook Facility	Retrospective	Audit	7	32	Nov 19, 2019
Eastbrook Facility	Second Rebuttal	Audit	0	0	Nov 19, 2019
Eastbrook Facility	IP	Audit	205	305	Jan 22, 2020
Eastbrook Facility	IP Rehab	Audit	4	15	Jan 22, 2020
Eastbrook Facility	OP ER	Audit	11	43	Jan 22, 2020
Eastbrook Facility	OP BDO	Audit	2	19	Jan 22, 2020
Eastbrook Facility	OP Single/Recurring	Audit	3	15	Jan 22, 2020
Eastbrook Facility	Retro IP	Audit	1022	1053	Feb 15, 2020
Eastbrook Facility	Retro IP Rehab	Audit	2	3	Feb 15, 2020
Eastbrook Facility	Retro OP ER	Audit	18	30	Feb 15, 2020
Eastbrook Facility	Retro OP Single/Recurring	Audit	9	17	Feb 15, 2020
Eastbrook Facility	Retro OP BDO	Audit	7	9	Feb 15, 2020
Eastbrook Facility	Completed IP Rehab	Audit	0	1909	Feb 19, 2020
Eastbrook Facility	Completed OP BDO	Audit	21	5958	Feb 19, 2020
Eastbrook Facility	Completed OP ER	Audit	18	10700	Feb 19, 2020
Eastbrook Facility	Completed OP Single/Recurring	Audit	4	3358	Feb 19, 2020
Eastbrook Facility	Completed IP	Audit	23	31328	Feb 19, 2020
Eastbrook Facility	Completed Retro IP Review	Audit	33	8172	Apr 09, 2020
Eastbrook Facility	Completed Retro OP ER Review	Audit	4	6105	Apr 09, 2020
Eastbrook Facility	Completed Retro OP BDO Review	Audit	0	2829	Apr 09, 2020


Facilities

This section contains a list of Facilities that the user can access. If only one facility is assigned, this section will not display.












Click the blue Facility name to open the Facility Workpool list.

Click the  icon to open the Reports page.

- The page will open in a new browser tab with the prefilled Service provider, Client, and Facility data.

Click the  icon to open the Dynamic List page in a new browser tab.

- The page will open in a new browser tab with the prefilled Service provider, Client, and Facility data.

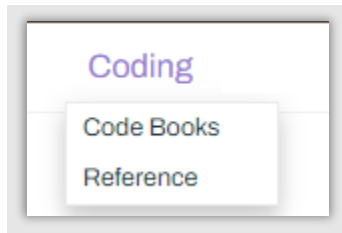
Facilities	Actions
East2	 
Eastbrook Facility	 
NewClientK	 
Test	 
Test2	 
Test24	 

eValuator Classic Access

Click 'eValuator Classic Access' to open the classic homepage view.

Coding

The Coding option is available to all users and contains two options: Code Books and Reference.



Code Books

This is a direct link to open the TruCode Code Book in a new browser tab.

Reference

This is a direct link to open the TruCode Reference in a new browser tab.

Dynamic List

The Dynamic List option is available to users with the Dynamic List role.

Click Dynamic List to open the page in a new browser tab.

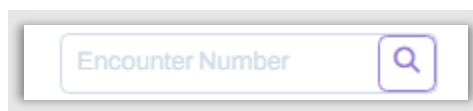
Reports

The Reports option is available to users with the Reports role.

Click Reports to open the page in a new browser tab.

Encounter Search

The encounter search is now in the homepage's header and will return all encounters, regardless of whether they reside within a Workpool. The search is multifunctional in that users can search for encounters by their ID and perform actions on them. The results will be based on the logged-in user's role and access level, encounter stage, and if the encounter is reserved for a user. Users can perform a 'Starts With' search by adding an asterisk to the end of their search text (for example, 12345* would bring back all encounters that started with 12345).



Auditor, QC, Manager, Service Admin Users

The encounter search for users with Auditor, QC, Manager, and/or Service Admin user role(s) will return encounters within Workpools from Facilities they have been granted access to and encounters that do not reside in a Workpool for the Facility.

Search Grid Actions

Users can click the kebob button on the left side of the results within the grid to reveal actions.

Encounter	Facility	Workpool	Stage	Reserved To	Started
MZ0721202316	Eastbrook Facility				
MZ0724202316	Eastbrook Facility				
mz072420232	Eastbrook Facility				
mz07262023	Eastbrook Facility				
MZ01222024	Eastbrook Facility	Pre-bill Audits	Audit		

1 - 5 of 109 items

If the encounter does not reside within a Workpool, the actions are as follows:

Encounter	Facility	Workpool	Stage	Reserved To	Started
MZ0721202316	Eastbrook Facility				
mz07262023	Eastbrook Facility				
MZ01222024	Eastbrook Facility	Pre-bill Audits	Audit		

1 - 5 of 109 items

View

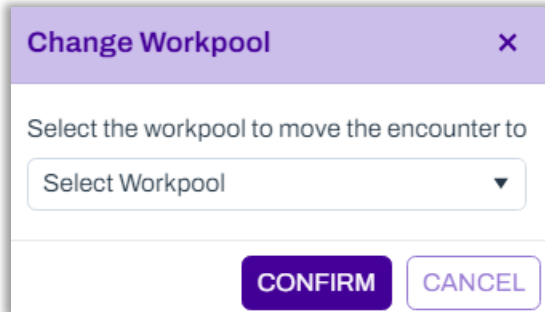
Opens the encounter in display mode within a new browser tab.

Audit History

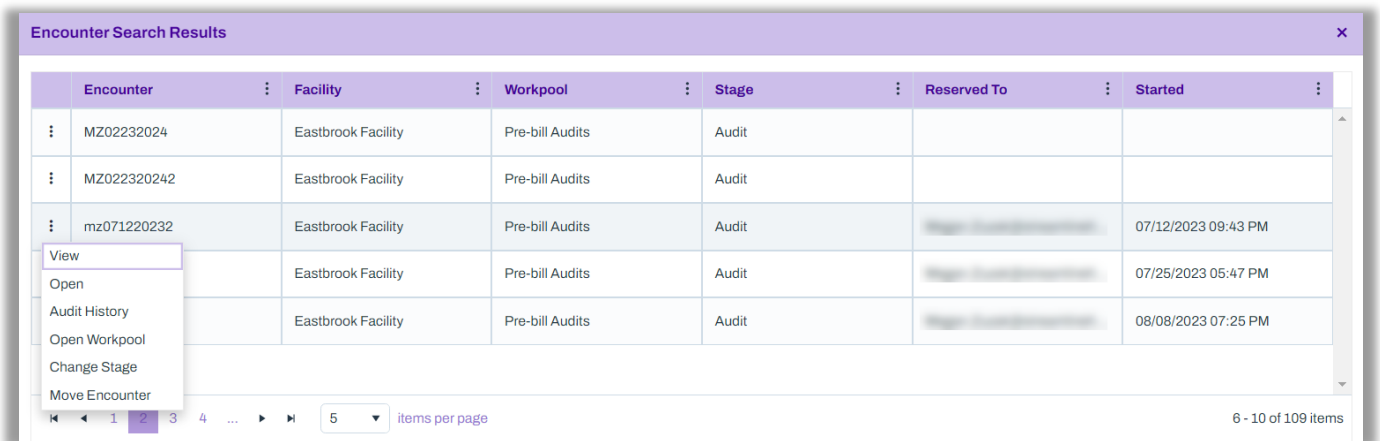
Opens the Audit history for the encounter within a new browser tab.

Move Encounter

This option opens a Change Workpool dialog. The user can select an active Workpool at the facility to move the encounter to.



If the encounter is within a Workpool, the actions are as follows:



View

Opens the encounter in display mode within a new browser tab.

Open

If the encounter is within the Audit stage and unassigned, it opens in Audit mode. If it is assigned to another user and resides in a stage other than Audit, it opens in Display-only mode.

Audit History

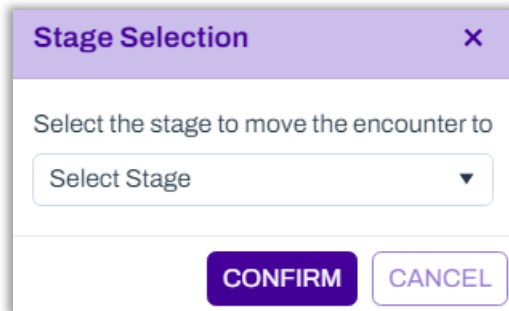
Opens the Audit history for the encounter within a new browser tab.

Open Workpool

Opens the Workpool Details page for the Workpool that the encounter resides within in a new browser tab.

Change Stage

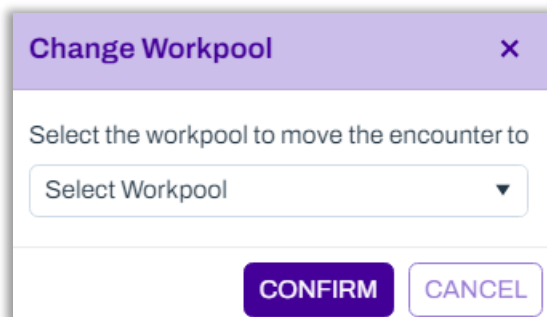
This option opens a Stage Selection dialog. The user can select a Stage and Confirm to change the encounter's stage.



The image shows a 'Stage Selection' dialog box. It has a purple header with the title 'Stage Selection' and a close button (X). Below the header, there is a text prompt: 'Select the stage to move the encounter to'. Underneath this prompt is a dropdown menu with the text 'Select Stage' and a downward arrow. At the bottom of the dialog, there are two buttons: a purple 'CONFIRM' button and a white 'CANCEL' button with a purple border.

Move Encounter

This option opens a Change Workpool dialog. The user can select an active Workpool at the facility to move the encounter to.



The image shows a 'Change Workpool' dialog box. It has a purple header with the title 'Change Workpool' and a close button (X). Below the header, there is a text prompt: 'Select the workpool to move the encounter to'. Underneath this prompt is a dropdown menu with the text 'Select Workpool' and a downward arrow. At the bottom of the dialog, there are two buttons: a purple 'CONFIRM' button and a white 'CANCEL' button with a purple border.

Coder

The encounter search for users with the Coder user role will return encounters that the user has previously coded and/or previously accessed.

Note: Coder encounter search results and actions vary from other user roles.

View

Opens the encounter in display mode within a new browser tab.

Open

If the encounter is within the Coder stage and unassigned, it opens in Coder mode. If the encounter is assigned to another user and resides in a stage other than the Coder, the option does not exist.

Audit History

Opens the Audit history for the encounter within a new browser tab.

User Icon

Hovering over the user icon in the top right-hand corner of the header unveils a menu with options to change the password, access the Contact Us page, and log off.

