EMT/PRM Module Handbook

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Introduction

What's the purpose

The purpose of this Handbook is to guide you through accessing and utilizing the **Engagement Management Tool (EMT)/Provider Relationship Management (PRM)** module of the Evoke360 platform.

It is recommended to review the entire **Table of Contents** to familiarize yourself with the sections covered in the Handbook. This will help you navigate the content more efficiently and ensure you don't miss any important sections.

What's the EMT/PRM module

The **EMT/PRM module** is designed to be used by engagement managers (EMs) as they work with providers and locations. This module contains several tools that help EMs visualize performance metrics, manage appointments, observe team productivity, provide detailed team information, and upload documents on an office-by-office basis.

How to enable permissions

If you do not see the **EMT/PRM module** within the main Menu, it is likely because you do not have the correct user role and/or permissions. Please contact your system administrator or DataLink Customer Support to enable your organization's correct user role and permission settings.

Disclosure Statement

The content and features detailed in this Handbook may differ from those in the Evoke360 platform. The functionality and visibility of the module in the application are dependent upon your assigned user role, permissions, and/or organization's settings. Therefore, your access may be limited or restricted based on your user profile.

Please contact your system administrator or the DataLink Customer Support team if you require additional permissions or have any questions on your access rights.

DataLink Customer Support

Call us at: **(888) 636-8175**, then press 1
Email us at: **productsupport@datalinksoftware.com**
Check out our **Help Center** to search our knowledge base.
Click this link for **EMT/PRM FAQs**.

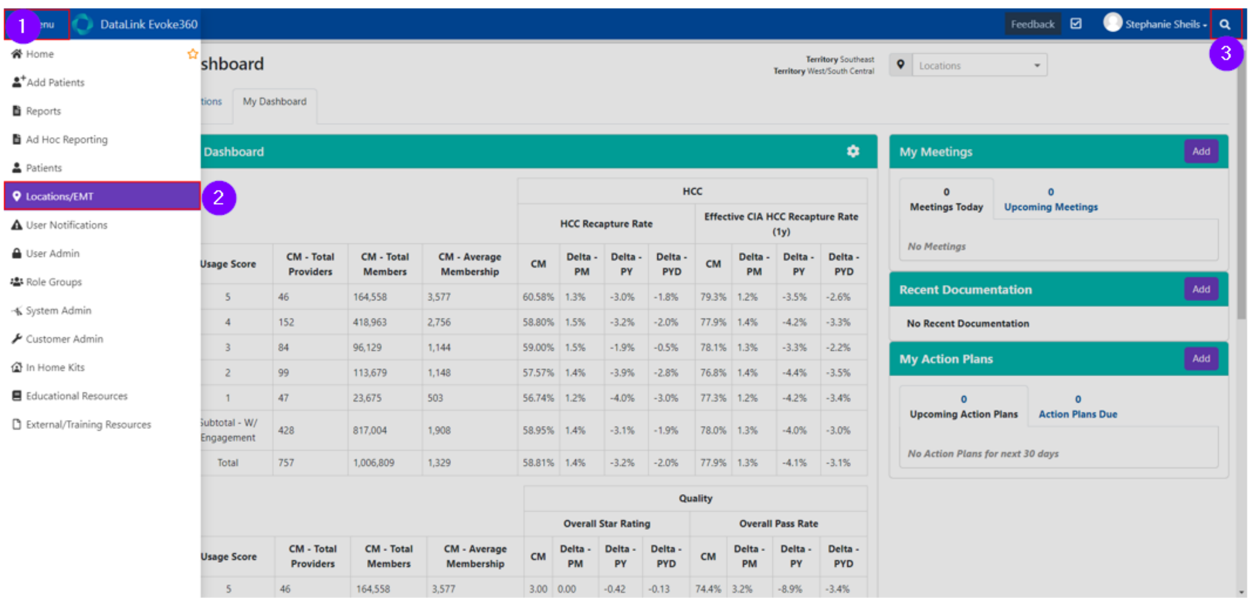
Navigating to the EMT/PRM module

Through the main Menu,

1. Click the **Menu button** (1),
2. Select the **Locations/EMT section** (2), or

Through the Evoke360 search functionality,

1. Click the **magnifying glass icon** (3),
2. Type in at least three valid characters of a location,
3. Select the correct location from the dropdown options.

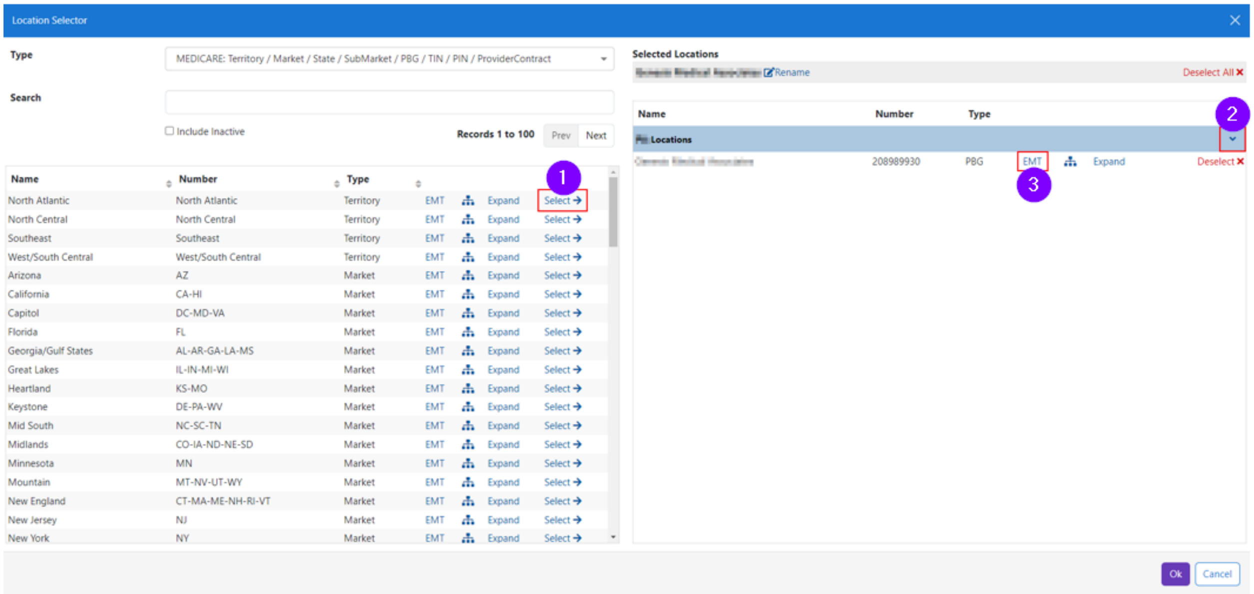


Overview of the Menu and Search locations.

[Skip to What's on the module Menu](#)

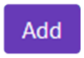
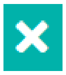
Through any report from the Filters tab,

1. Click the **Locations field** to open the ***Locations Selector*** modal,
2. Click ***Select*** (1) on a location(s) to display the selected location(s),
3. Click the **dropdown arrow** (2) to display location(s),
4. Click the **EMT hyperlink** (3).



An opened Location Selector modal.

Understanding the functionality icons

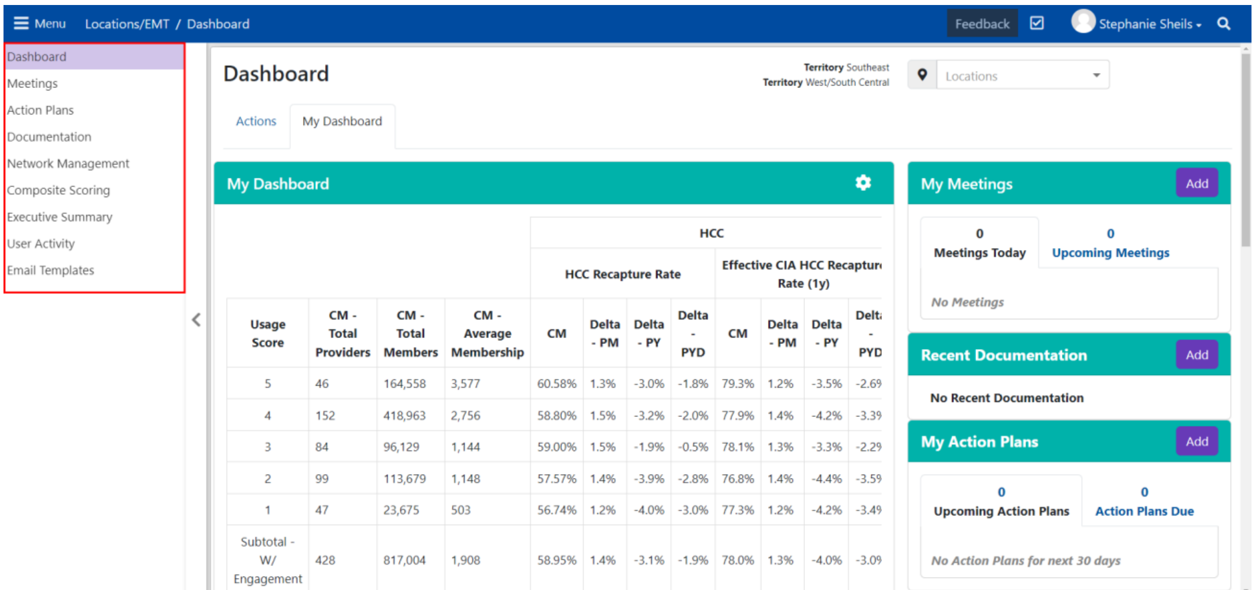
Icon	Icon Description
	Click to search for keywords.
	Click for advanced search filters.
	Click to add (meeting, documentation, etc.) to the module.
	Click to add (meeting, documentation, etc.) to the module.
	Click to enter the expanded mode.
	Click to copy an existing action plan or an initiative.
	Click to delete.
	Click to edit.
	Click to save.
	Click to close/cancel.
	Click to share via secure email.

Skip to understanding the module's sections
Back to adding, viewing, copying, editing, or deleting action plans
Back to adding, viewing, copying, editing, or deleting initiatives
Back to adding, completing, viewing, sharing, editing, deleting, or recovering documentation

What’s on the module menu

The main Menu, search functionality, and/or EMT hyperlink selections will navigate you either to the module’s **Dashboard** (landing page) or the Provider Profile. The module’s menu options will display on the left side of the page.

The module’s sections include the *Dashboard, Meetings, Action Plans, Documentation, Network Management, User Activity* (internal-only), and *Email Templates.*



The main menu located on the left-hand side of the page.

Skip to understanding the module's sections
Skip to What's on the Provider Profile

Understanding the module's sections

Section Name	Section Description
Dashboard	The *Dashboard* is the default landing section of the module. You may view several grids that display HCC data, Quality metrics, PMPM by Usage Scores, meeting information, and recent documentation.
Meetings	The *Meetings* section allows you to view their recent or upcoming meetings via an interactive calendar. New meetings may be added and modified, as desired.
Action Plans	The *Action Plans* section allows you to view, modify, and create new action plans for their assigned locations. You may also search by Action Plan Name in the search bar as well as perform advanced filter options.
Documentation	The *Documentation* section has three tabs: *Pending Forms*, *Completed Forms*, and *Uploaded Documents*. This section serves as a record of all documents in Evoke360. documentation recorded here is specific to the selected location.
Network Management	The *Network Management* section allows you to select specific locations and view the providers assigned to that location. You can enter the Provider Profile by clicking on the location link (top right).
User Activity	The *User Activity* (internal-only) section allows provider engagement managers to review all user activities related to meetings or documents that have been created, modified, or deleted.
Email Templates	The *Email Template* section allows you to create and edit email templates with a title, order, subject, and body of the email.

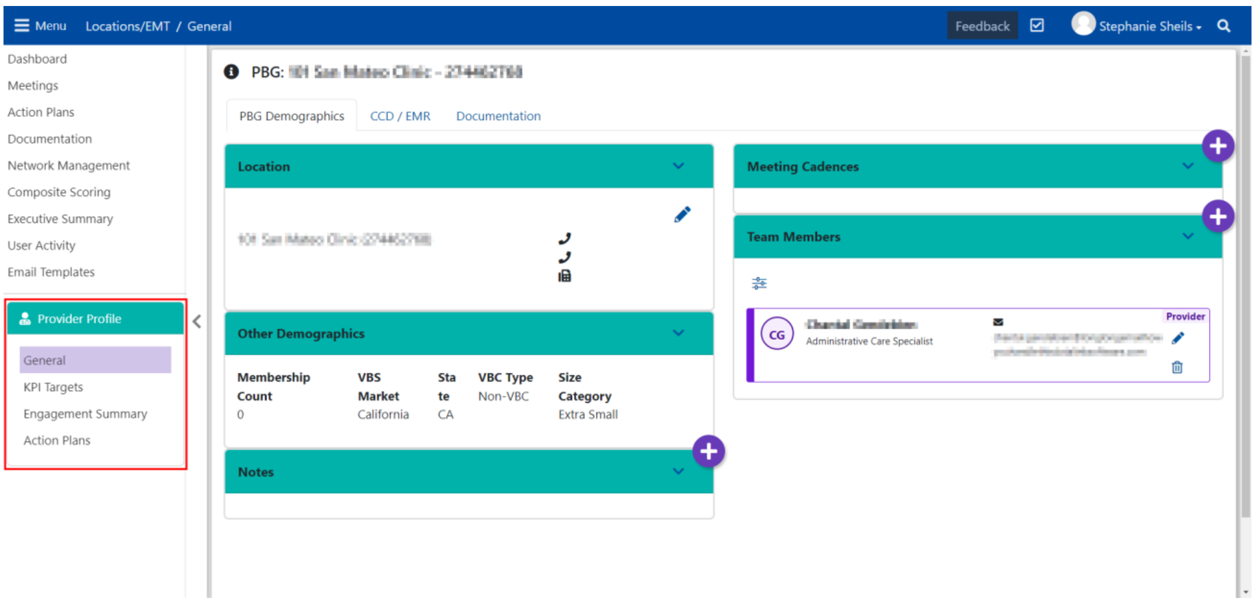
Click the section name hyperlink to skip to that section.

What's on the Provider Profile

The *Provider Profile* submenu sections include *General, KPI Targets, Engagement Summary*, and *Action Plans.*

The *Provider Profile* will display if you do the any of the following:

1. Select a specific location or provider hyperlink in the module itself,
2. Select a specific location or provider through the Evoke360 search functionality,
3. Select a specific location or provider in the Location Selector modal of an Evoke360 report.



The Provider Profile is located beneath the module's main menu.

[Back to What's on the module menu]

Understanding the Provider Profile sections

Section Name	Section Description
General	The *General* section lists location-specific information, such as location demographics, including meeting cadences and team members, CCD/EMR information and usage, and documentation.
KPI Targets	The *KPI Targets* section allows you to add, edit, or delete KPI targets per location, line of business, and/or products for *Quality*, *Utilization Management*, and *Financials*.
Engagement Summary	The *Engagement Summary* section provides a *Summary* of HCC, Quality and PMPM data as well as *Score* data, per selected location.
Action Plans	The *Action Plans* section allows you to search by Action Plan Name in the search bar as well as perform advanced filter options, such as performance drivers (quality, efficiency, other) and line of business filters, per location.

Adding, reviewing, editing, or deleting KPI targets

From the Provider Profile's **KPI Targets** section:

To add a new KPI target,

1. Click the **purple plus (+) icon**,
2. Complete all the required fields* in the ***Add New KPI Target*** **modal**,
3. Click **Reset to Default**, **Save**, or **Cancel**.

To view/edit/delete a KPI target,

1. Review existing KPI target by *Quality*, *Utilization Management*, and *Financials* sections,
2. Click the pencil icon to open/edit the fields in the ***Edit KPI Target*** **modal**,
    a. Click **Save** or **Cancel**.
3. Click the trash icon to delete the KPI target,
    a. Click **OK** or **Cancel**.

Note: Only the KPI creator may edit or delete a KPI target.

What’s on the Dashboard

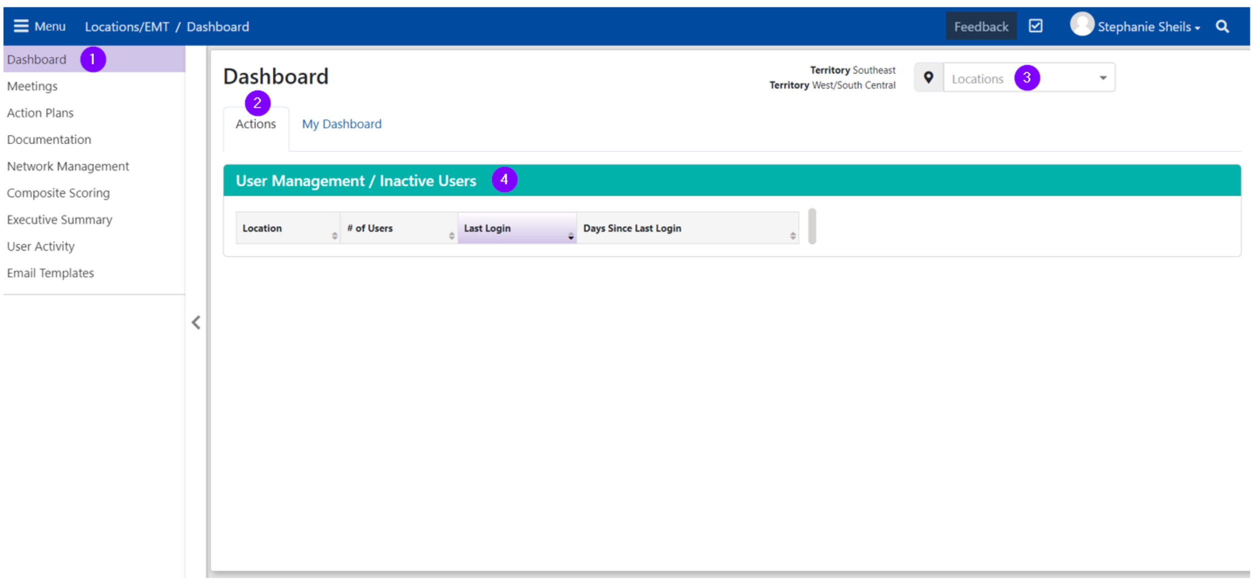
The **Dashboard section** is the default landing of the module. It contains two tabs: *Actions* and *My Dashboard*. The *Actions* tab is for internal-use only.

The Actions tab

The *Actions* tab displays a **User Management/Inactive Users** reference report, which includes the location, the number of users, the last login, and days since last login.

To access the Actions tab,

1. Select the **Dashboard** (1),
2. Click the *Actions* tab (2),
3. Choose a location(s) in the Locations search bar (3),
    a. Multiselect dropdown options.
4. Review the populated reference report (4).



Overview of the Dashboard > Actions tab.

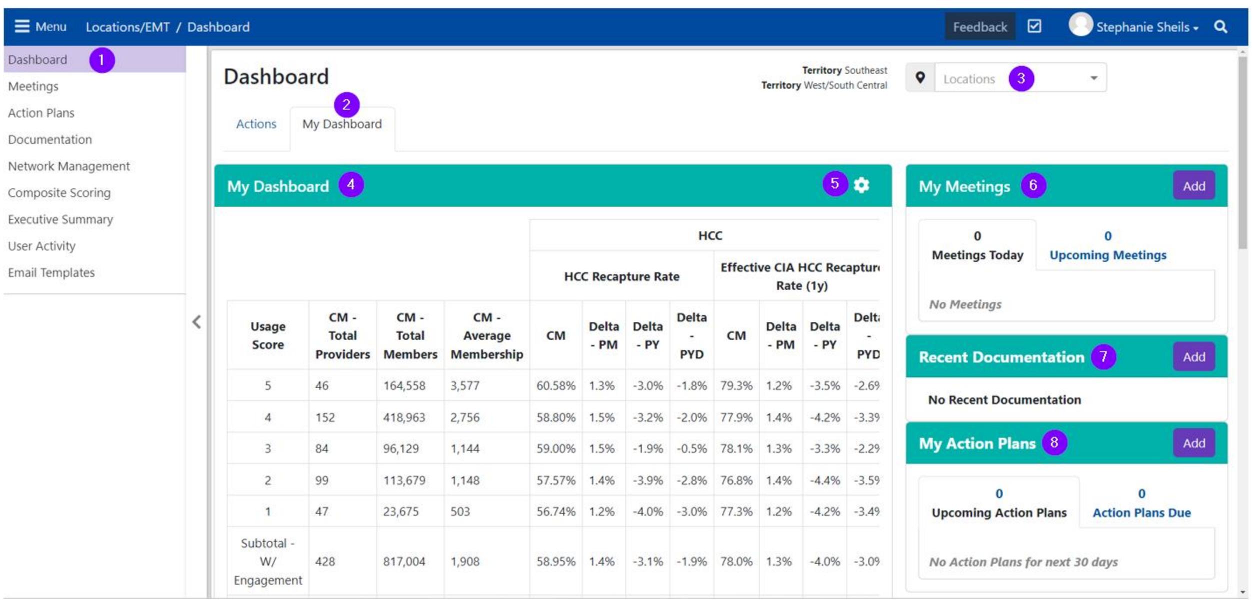
[Skip to My Dashboard tab]
[Skip to Reviewing and adding meetings from the Dashboard]
[Skip to Reviewing and adding recent documentation from the Dashboard]

The My Dashboard tab

The *My Dashboard* tab provides further insights into an assigned location(s).

It contains the following grids and graphs: *HCC, Quality, PMPM by Usage Score*, *Quality Performance – Market Level*, *Star Score*, *Admits*, *Chronic Conditions*, *% of Members with Office Visits*, *Metrics below KPI Thresholds*, and *Top 5 Most Discussed KPI Metrics*.

1. Select the **Dashboard** (1),
2. Click the *My Dashboard* tab (2),
3. Choose a location(s) in the Locations search bar (3),
    a. Multiselect dropdown options.
4. Review available *My Dashboard* grids and graphs (4),
    a. Click the **gear icon** (5) to customize *My Dashboard*.
5. Review/Add meeting(s) in [*My Meetings*]() (6),
6. Review/Add documentation in [*Recent Documentation*]() (7),
7. Review/Add action plan(s) in [*My Action Plans*]() (8).



Overview of the Dashboard > My Dashboard tab.

Understanding My Dashboard grids

Grid Title	Grid Description
HCC	The *HCC grid* displays, per location, the HCC Usage Score, CM – Total Providers, CM—Total Members, CM – Average Membership, HCC Recapture Rate (per month, per year, per year to date), and Effective CIA HCC Recapture Rate (1y) (per month, per year, per year to date).
Quality	The *Quality grid* displays, per location, the Quality Usage Score, CM – Total Providers, CM—Total Members, CM – Average Membership, Overall Star Rating (per month, per year, per year to date), and Overall Pass Rate (per month, per year, per year to date).
PMPM by Usage Score/ CM Contract	The *PMPM by Usage Score/CM Contract grid* displays, per location, the PMPM Usage Score, CM – Total Providers, CM Membership, the Stars Base Rate and Stars Composite Score, the CIA Base Rate and Composite Score, and the Efficiency Base Rate and Composite Score. Filter options include by CM Contract and by Base Rate. The title of the grid is *PMPM by Usage Score* for all assigned locations. If a location is specified in the **Locations** search bar, the title of the grid updates to *CM Contract* and provides location-specific information only.
Quality Performance - Market Level Graph	The *Quality Performance - Market Level Graph* displays a comparison of markets and their current performance.

Understanding more about the Quality Performance – Market Level graph

The *Quality Performance - Market Level* graph displays a comparison of markets and their current performance.

The *Quality Performance - Market Level* graph is interactive. You can click into several areas of the graph, including the bar graph or line data point, to review further metrics. The **Avg Star Score Range** filter enables you to slide to select unique Star Score ranges, which updates the graph and data table automatically.

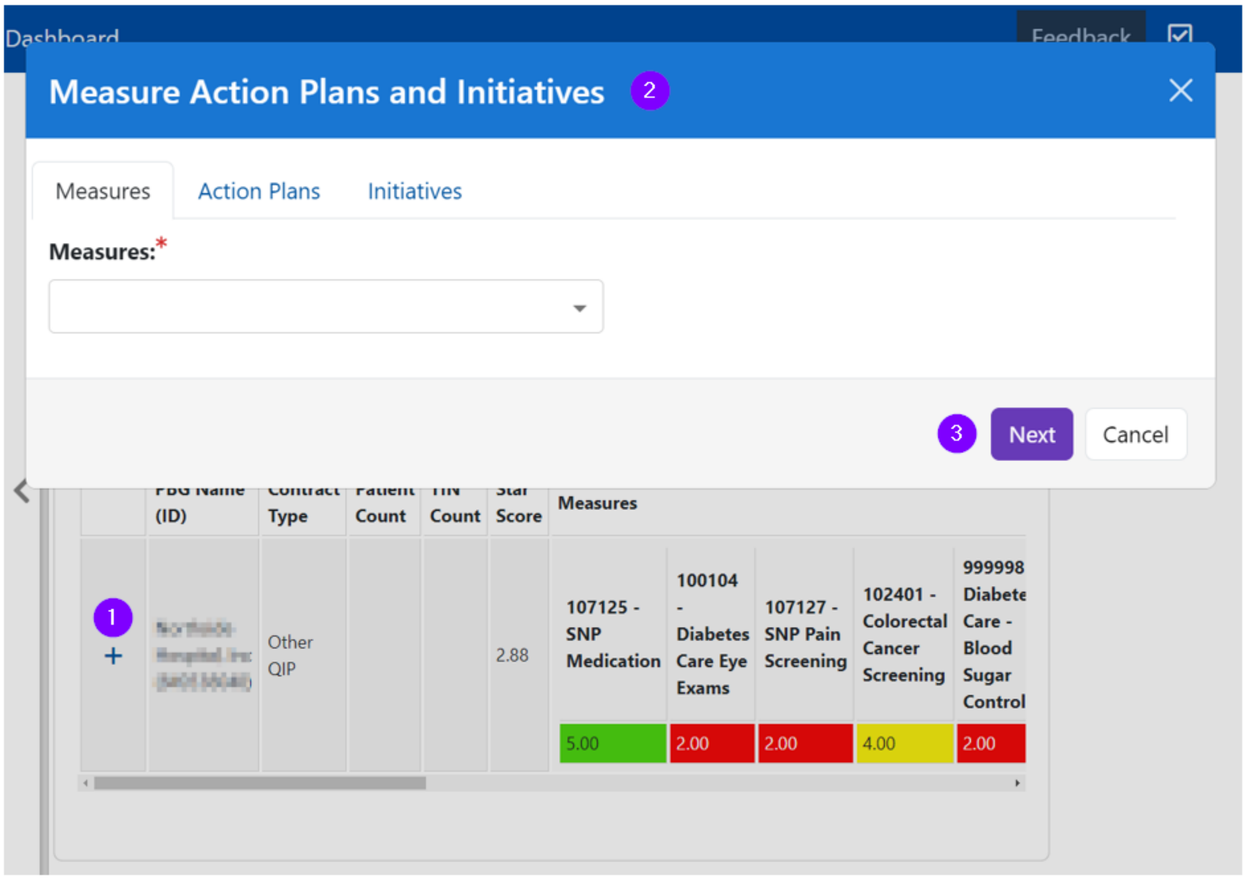
Note: You may only see the locations directly assigned to you in the Managed Provider Profiles, otherwise an error message will appear: "Location access limited based on Managed Provider Profile access."

	South Central	VI	Capitol	AZ	OH_KY	Florida	California	MN	Great Lakes	Keystone	New England	Mid South	NY_NJ	Northwest / Mountain	Georgia / Gulf States	Heartland
# of PBGs	3,719	1	1,685	542	1,648	3,800	3,128	159	3,079	2,187	1,343	2,149	5,059	1,552	3,217	2,665
# of Patients	78,361		34,314	25,692	199,083	32,570	1,190	15,630	143,684	282,670	118,343	96,237	243,398	59,563	123,430	186,039
# of TINs	7,304	1	2,252	1,316	3,290	4,440	7,397	231	6,018	4,080	2,302	3,502	9,875	2,553	7,688	5,500
Average Star Score	3.49	3	3.65	3.52	3.4	3.74	3.86	3.4	3.58	3.39	3.6	3.5	3.34	3.47	3.4	3.47

Overview of the Quality Performance – Market Level graph.

You can also create new *Measure Action Plans and Initiatives* for a specific location.

1. Review/Click a region or patient count from the bar or line graph (drills in),
2. Review/Click an engagement manager from the bar graph (drills in),
3. Review the quality performance of EM,
4. Click the **+ option** (1) located in the far-left column to open modal,
5. Complete all required fields* of the ***Measures, Action Plans, and Initiatives* modal** (2),
    a. **Measures*** field is multiselect.
6. Click **Next**, **Save**, or **Cancel** (3).



The Measure Action Plans and Initiatives modal.

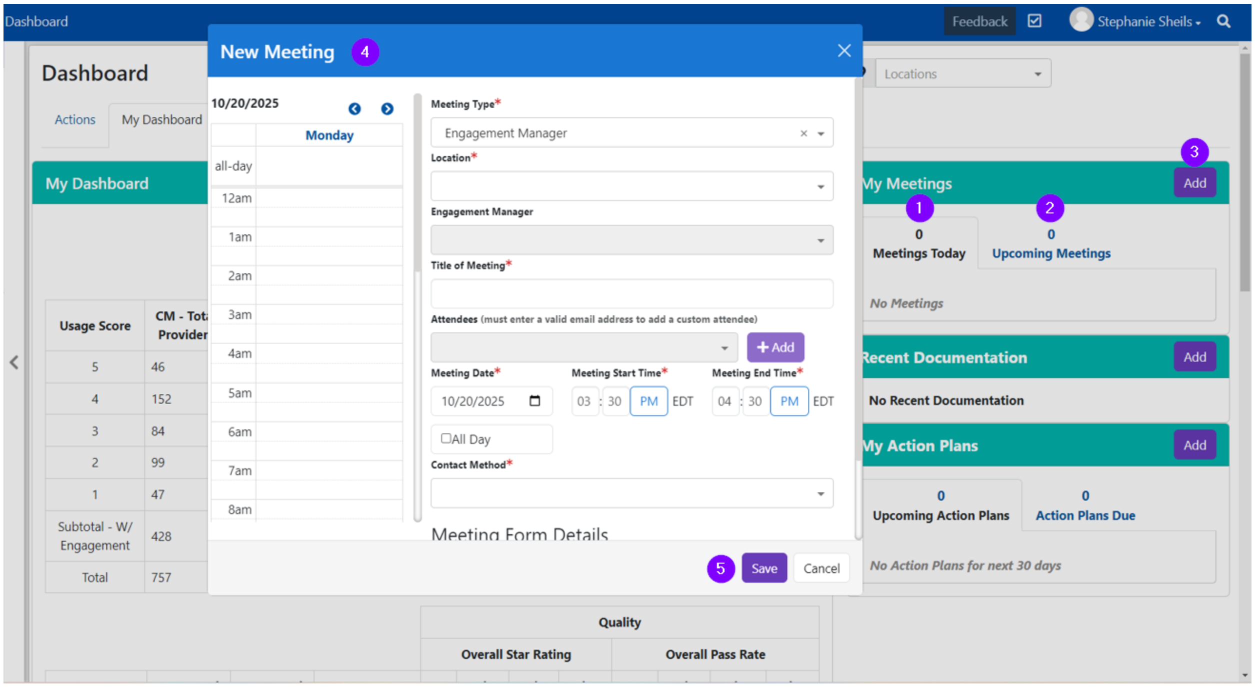
Reviewing and adding meetings from the Dashboard

From *My Dashboard*, you can review **Meetings Today** (1) and **Upcoming Meetings** (2), as well as **Add** (3) a new meeting.

To **Add** a new meeting from *My Dashboard,*

1. Click the **Add button** (3) located in the **My Meetings** section,
2. Complete all required fields* of the ***New Meeting* modal** (4),
3. Click **Save** or **Cancel** (4).

Note: You can edit or remove/cancel meetings you have created in the [Meetings section] of the module's main Menu.



My Dashboard > My Meetings section and modal.

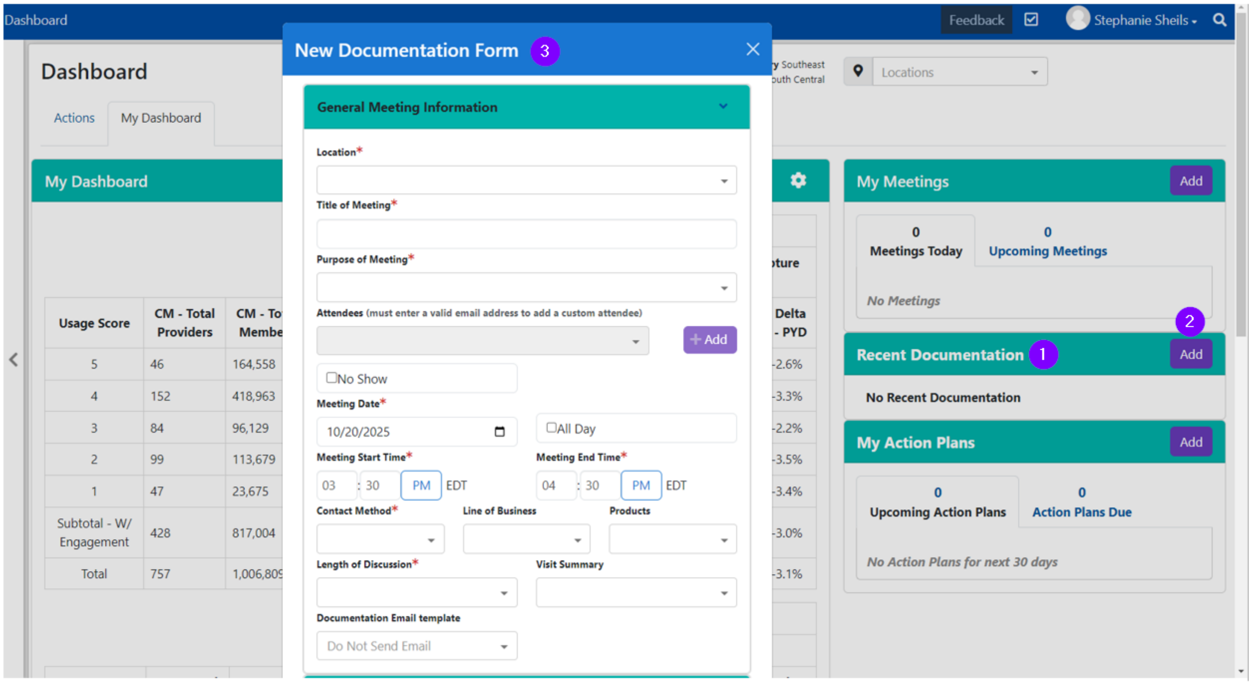
Reviewing and adding recent documentation from the Dashboard

From *My Dashboard*, you can review **Recent Documentation** (1) as well as **Add** (2) new documentation.

To **Add** new documentation from *My Dashboard,*

1. Click the **Add button** (2) located in the **Recent Documentation** section (1),
2. Complete all required fields* of the ***New Documentation Form* modal** (3),
3. Click **Save**, **Save and Complete**, or **Cancel**.

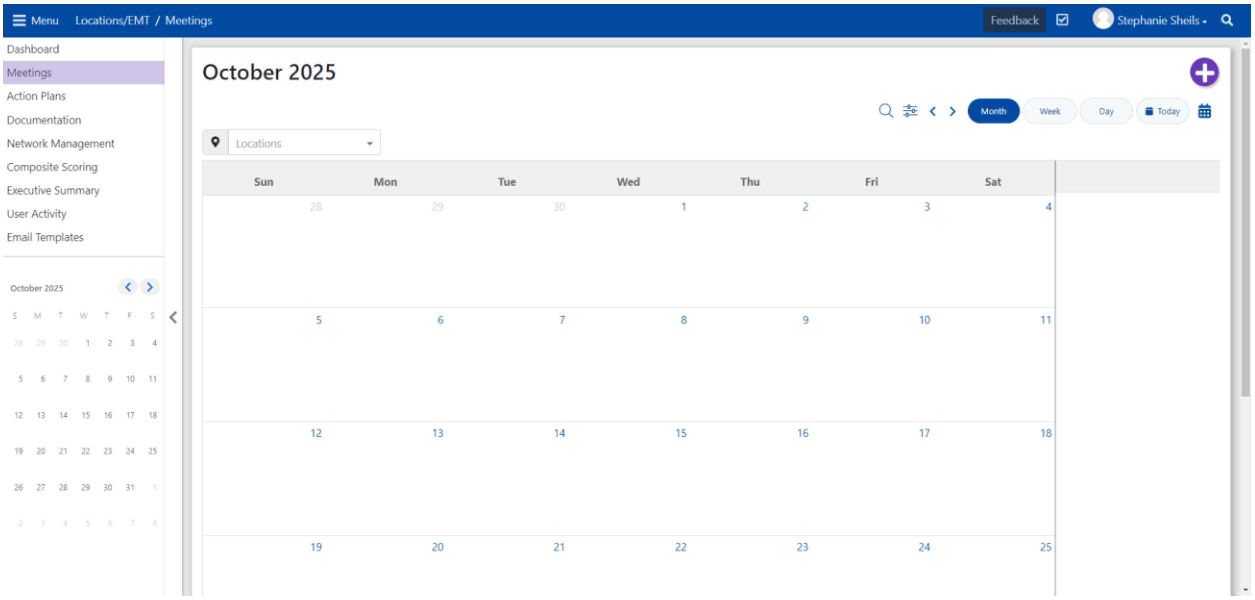
Note: You can edit or delete documentation you have created in the [Documentation section](#) of the module's main Menu.



My Dashboard > Recent Documentation section and modal.

What's in Meetings

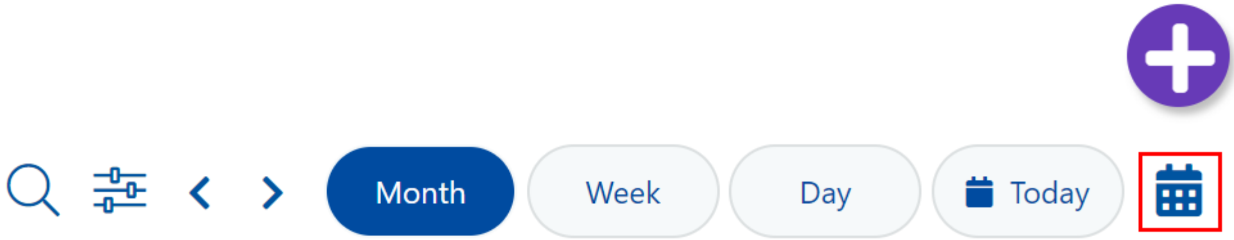
The **Meetings** section of the module is a large, interactive calendar where you can view, create, update, and remove/delete all scheduled meetings for your assigned locations.



Overview of the Meetings section.

Understanding the calendar screen

The action buttons are located along the top of the calendar. The functionality includes choosing your calendar view, [importing your Outlook meetings](#) (**blue calendar icon**), or quickly adding a new meeting. You can hover your mouse over the icon for a tooltip on its functionality.



Multiple options located at the top of the calendar.

Adding, viewing, editing, or removing meetings from the calendar

To add a new meeting,

1. Click the **purple plus (+) icon** to add new meeting,
2. Complete all the required fields* in the ***New Meeting* modal**,
3. Click **Save** or **Cancel**.

To view/edit/remove a scheduled meeting,

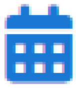
1. Select an existing meeting from the calendar,
2. Review the ***Meeting* modal** information,
3. Update fields (if you are the creator),
4. Click **Edit**, **Save**, **Remove**, or **Cancel**.

Note: Only the meeting creator may edit or remove a scheduled meeting.

Importing your Outlook meetings to the calendar

To integrate your Outlook meetings into the module,

1. Select the blue calendar icon,
2. Click OK to provide consent for access and import.

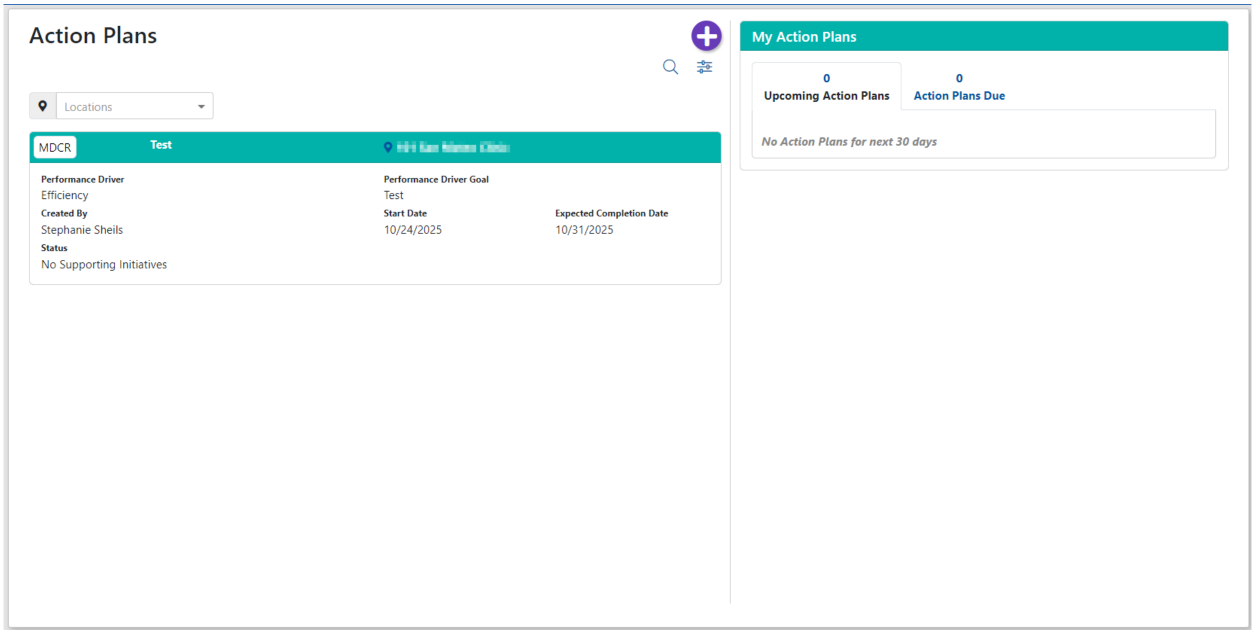


Import Outlook Meetings icon.

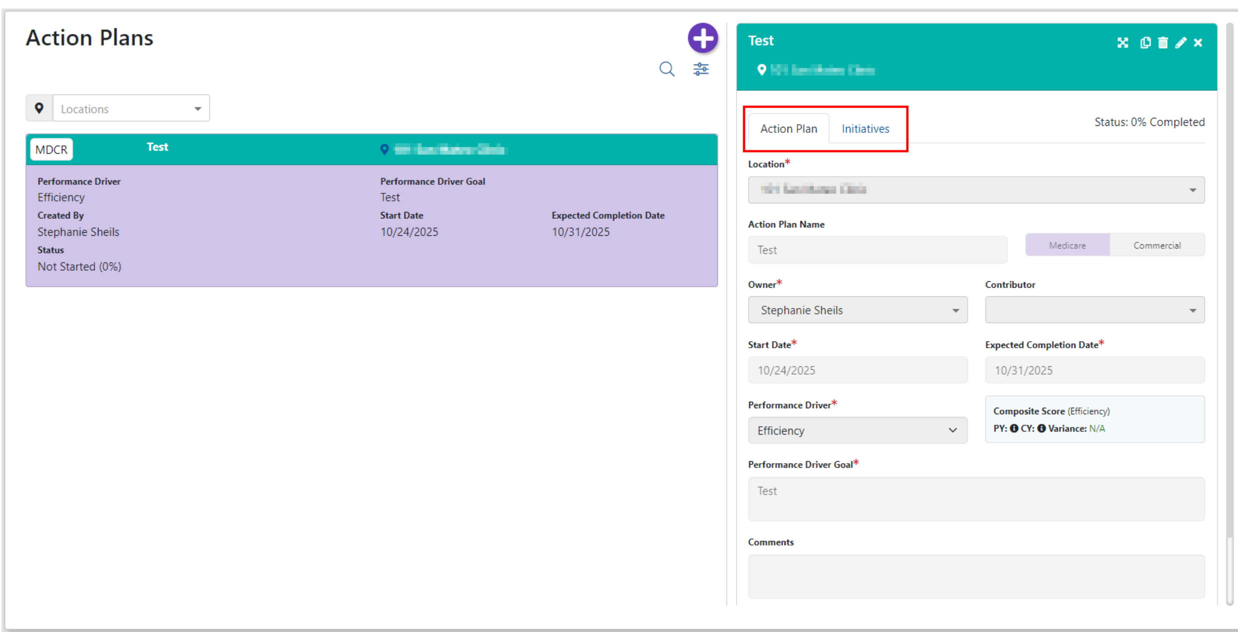
Note: Your imported Outlook meetings will be reflected in purple.

What's in Action Plans

The **Action Plans** section displays your action plans in chronological order. From here, you can view, search, and add a new action plan. ***You must click the action plan*** to view, copy, update, or delete it. The details of the selected action plan will display in the side panel. From there, you can also add or edit an initiative.



Overview of the Action Plans section.



Overview of a selected Action Plan with details displayed in panel.

Adding, viewing, copying, editing, or deleting action plans

To add a new action plan,

1. Click the **purple plus (+) icon** to add new action plan,
2. Complete all the required fields* displayed in the ***New Action Plan*** panel,
3. Click the icon to perform the following actions (hover for tooltips):
   a. **Expand**
   b. **Save**
   c. **Close**

To view/copy/edit/delete an action plan,

1. Select an existing action plan,
2. Review the fields displayed in the panel,
3. Update fields (if you are the creator),
4. Click the icon to perform the following actions (hover for tooltips):
   a. **Expand**
   b. **Copy**
   c. **Delete**
   d. **Edit**
   e. **Save**
   f. **Close**

Note: Only the action plan creator may edit or delete the action plan.

Adding, viewing, copying, editing, or deleting initiatives

You can navigate to initiatives by selecting an existing action plan. From there, you can click on the *Initiatives* tab in the displayed side panel to add, view, copy, edit, or delete an initiative.

Initiatives can be added to help track location performance and improvement. Initiatives can also indicate the progress of an action plan based on the number of completed initiatives.

Note: The *Initiatives* tab is only available once an action plan has been saved.

To add a new initiative,

1. Click the **purple plus (+) icon** to add new action plan,
2. Complete all the required fields* displayed in the ***Add New Initiative*** modal,
3. Click the icon to perform the following actions (hover for tooltips):
    a. **Expand**
    b. **Save**
    c. **Close**

To view/copy/edit/delete an initiative,

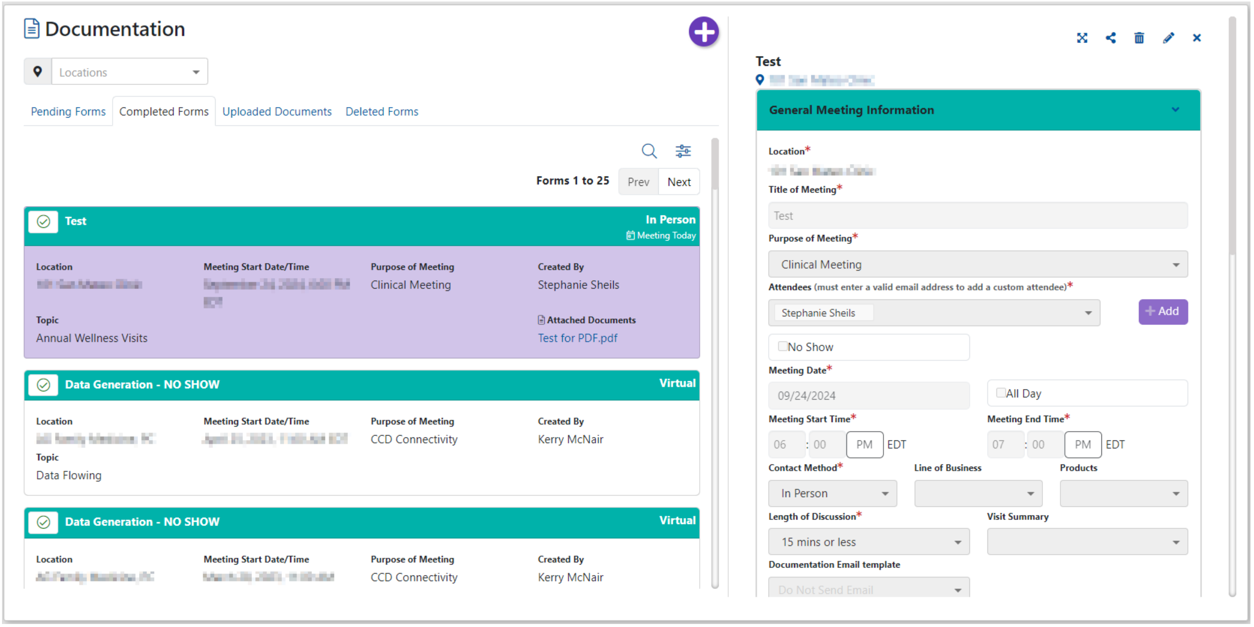
1. Select an existing action plan,
2. Review the fields displayed in the panel,
3. Update fields (if you are the creator),
4. Click the icon to perform the following actions (hover for tooltips):
    a. **Expand**
    b. **Copy**
    c. **Delete**
    d. **Edit**
    e. **Save**
    f. **Close**

Note: Only the action plan and initiative(s) creator may edit or delete the initiative(s).

What’s in Documentation

The **Documentation** section allows you to review, update, and upload your documentation and other files for your assigned locations.

Your documentation is separated into the following tabs: *Pending Forms*, *Completed Forms*, *Uploaded Documents*, and *Deleted Forms*.



Overview of the Documentation section.

Understanding the documentation icons

Icon	Icon Description
	Indicates a draft form. ***An inactive drafted form will be deleted after 7 days.**
	Indicates a pending form.
	Indicates a completed form.
	Indicates a deleted form.

Adding, completing, viewing, sharing, editing, deleting, or recovering documentation

To add and/or complete a new document,

1. Click the **purple plus (+) icon** to add a new document,
2. Complete all the required fields* displayed in the ***New Documentation Form*** panel,
3. Click the icon (top of form) to perform the following actions (hover for tooltips):
    a. **Expand**
    b. **Share via Secure Email**
    c. **Save as Pending**
    d. **Close**, or
4. Click the button (bottom of form) to perform the following actions (hover for tooltips):
    a. **Close**
    b. **Save**
    c. **Complete**

To view/share/edit/complete/delete a document,

1. Select an existing document within any of documentation tabs,
2. Review the fields displayed in the panel,
3. Update fields (if you are the creator),
4. Click the icon (top of form) to perform the following actions (hover for tooltips):
    a. **Expand**
    b. **Share via Secure Email**
    c. **Delete**
    d. **Save as Pending**
    e. **Close**, or
5. Click the button (bottom of form) to perform the following actions (hover for tooltips):
    a. **Close**
    b. **Save**
    c. **Complete**

To recover a deleted document,

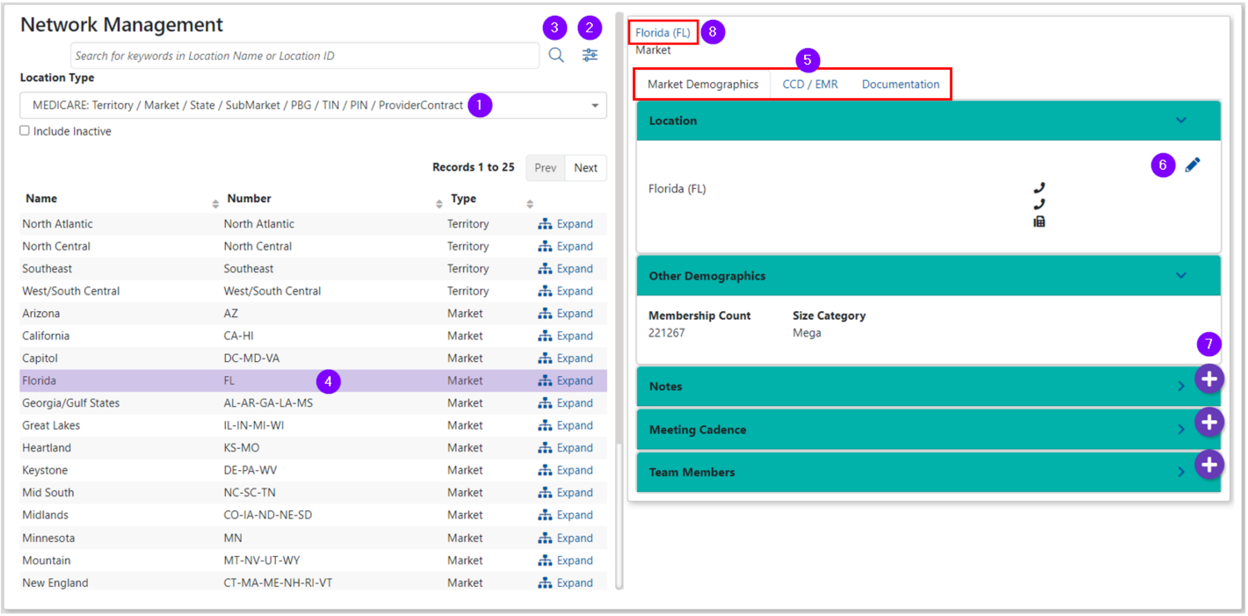
1. Click the *Deleted Forms* tab,
2. Select the deleted document you wish to recover,
3. Click the **edit icon** (pencil),
    a. Update the required fields in the panel, as needed.
4. Click **Save as Pending icon**, or the **Complete button** to save and complete the form,
5. Review the recovered document in the *Pending Forms* or *Completed Forms* tabs.

Note: Only the document creator may edit, delete, or recover a document.

What's in Network Management

The **Network Management** section quickly shows you the details on a specific location.

1. Search for your location(s) via the **Location Type** dropdown (1), or
2. Click the **advanced search filters icon** (2) or **magnifying glass** (3) to search and select a specific location(s) by keywords in *Location Name* or *Location ID*,
3. **Select a location** (4) from the rows displayed:
   a. Toggle between the **tabs** (5): *Demographics, CCD/EMR,* and *Documentation*,
   b. Utilize the **edit icon** (6) and **add icon** (7), if desired,
   c. Click the **location hyperlink** (8) to open the *Provider Profile* page/submenu.



Overview of a selected center with displayed details.

More on the location management tabs

Demographics

The *Demographics* tab includes information on the location, membership count, market, size category, notes, meeting cadences, and team members.

CCD/EMR

The *CCD/EMR* tab includes information on the location's EMR, CCD connectivity, and population health capabilities.

Documentation

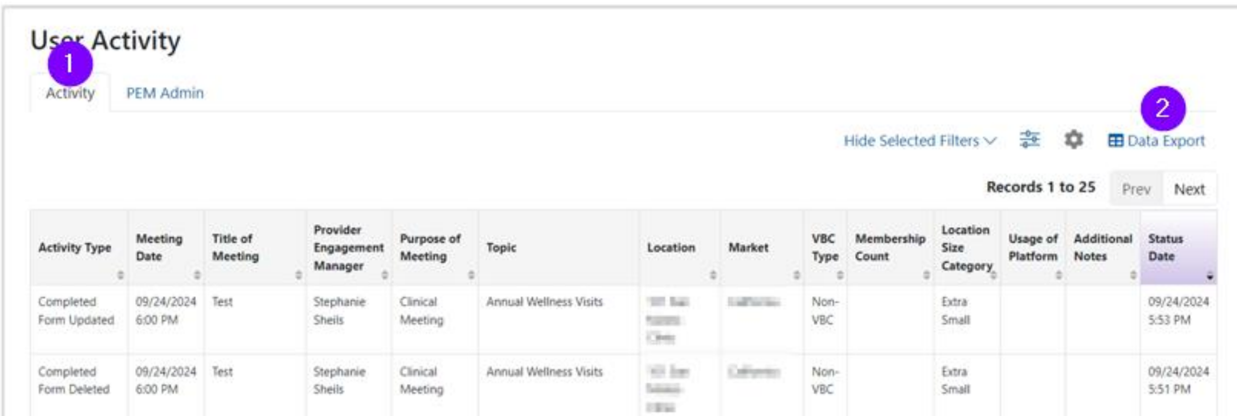
The *Documentation* tab includes documentation regarding a location's meeting details.

What's in User Activity

The **User Activity** section is internal-only and contains two reports: *Activity* and *PEM Admin*. These reports allow you to review user and EM activities in the module.

The Activity tab

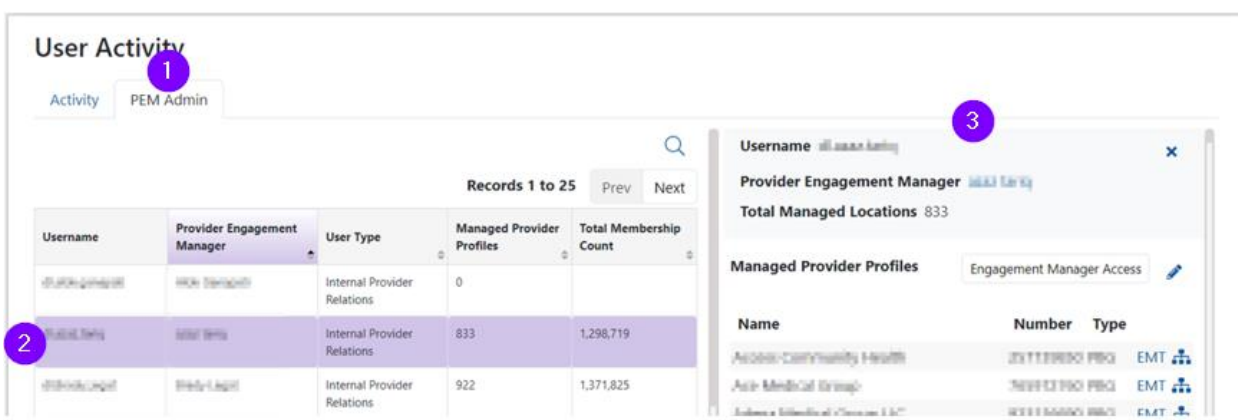
The *Activity* report tab (1) displays the user's activity type, the provider engagement manager, meeting details, location, market, VBC type, membership count, location size, usage of platform, additional notes, and the status datetime. Be sure to utilize the interactive sorting in the column headers, the filter icons, and the data export option (2) to download a .CSV format of the data.



User Activity > Activity report tab.

The PEM Admin tab

The *PEM Admin* report tab (1) displays the provider engagement manager's username, name, user type, number of managed provider profiles, and total membership count. Be sure to utilize the interactive sorting in the column headers, the search functionality, and clicking directly on the PEM's row (2) to open a display panel (3) with more information.

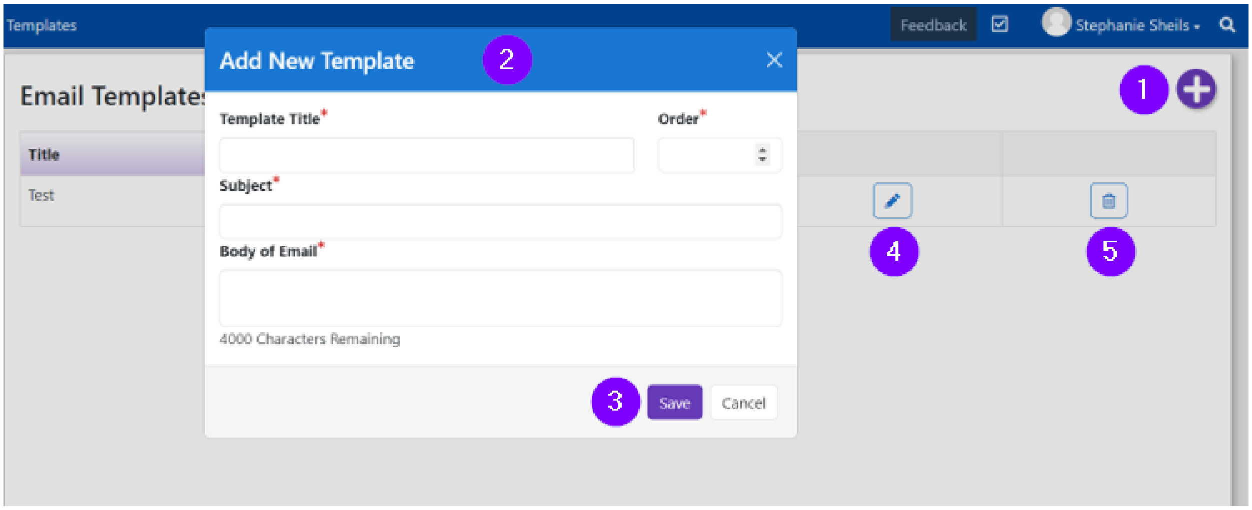


User Activity > PEM Admin report tab.

What's in Email Templates

The **Email Templates** section allows you to add, edit, and delete email templates in the module.

1. Click the **purple plus (+) icon** (1) to add a new email template
    a. Complete the required fields* in the ***Add New Template*** modal (2),
    b. Click **Save** or **Cancel** (3).
2. Click the **edit icon** (4) to update an existing template,
    a. Update the required fields* in the ***Edit Template*** modal,
    b. Click **Save** or **Cancel**.
3. Click the **trashcan icon** (5) to delete an existing template,
    a. Click **OK** or **Cancel**.



Email Templates > Add New Template modal.

Frequently Asked Questions

Please refer to DataLink's **Help Center** for [EMT/PRM FAQs](#).

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