

SAPC Value-Based Incentives Package
Building Performance and Risk Metrics (1-A)
Data Aggregation Platforms and Vendors

Purpose:

Below is a non-exhaustive list of potential data aggregation platforms and vendors that can meet the requirements for data aggregation software implementation. Different provider agencies will have different needs depending on current capabilities and priorities. **This list is for informational purposes only.** Please do your own research to determine which solution best fits your provider agency's needs.

Data Aggregation Platforms:

The following platforms are commonly used for data aggregation and analysis. Each platform below is also verified as having Health Insurance Portability and Accountability Act (HIPAA) compliant configurations. Most of these platforms have been reviewed by the PAC Data Workgroup (excluding Google Looker Studio). A more detailed comparison is available in the Project Management & Data Aggregation Platform Comparison document developed by the PAC Data Workgroup and included in page two of this document.

- **PowerBI** ([link](#)): Cloud-based business intelligence platform owned by Microsoft. Integrates deeply with the Microsoft 365 ecosystem.
 - **Tableau** ([link](#)): Data visualization platform known for its user-friendly drag-and-drop functionality.
 - **Monday.com** ([link](#)): Customer Relationship Management (CRM) platform offering dashboards and reporting as well as integrations into communications apps such as Slack, Teams, and Zoom.
 - **Zoho** ([link](#)): Cloud-based platform with AI-support, ease of use, and built-in collaboration tools.
 - **Google Looker Studio** ([link](#)): Web-based platform with drag-and-drop visualization, real-time collaboration, and integration into the Google ecosystem.
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Development and Advisory Services:

The following organizations offer development services or advisory support for provider agencies depending on the level of support needed for data aggregation platform implementation. Provider agencies are encouraged to conduct online searches to find the right level of support for your provider agency's needs.

- **California Institute for Behavioral Health Solutions** (cibhs.org): Available to provide additional technical assistance and conceptual or technical guidance services at no cost to provider agencies through SAPC. For more information, contact Martin Toledo, mtoledo@cibhs.org.
- **A1M Solutions** (a1msolutions.com)
- **Behavioral Health Data Project** (behavioral-health-data.com)
- **Behavioral Health Outcomes Data Services** (bhods.com)
- **Consilience Group** (consiliencegroup.com)
- **Facktor** (facktorhealth.com)
- **Mathematica** (mathematica.org)
- **Provisio** (provisiopartners.com)













Project Management & Data Aggregation Platform Comparison

Project management and data aggregation software helps organizations plan, execute, and track projects, analyze data in actionable ways, collaborate, integrate with compatible software, and allocate resources.

A summary of commercial project management and data aggregation platforms is provided below. These platforms are used for organizational across various sectors (e.g., sales, health, etc.). Key features are highlighted as well as potential use for Provider Advisory Committee (PAC) Provider Data Workgroup focus areas (i.e., Clinical, Financial, Workforce, and Organizational). Pricing for platforms generally ranges from \$5 to \$25 per user and enterprise pricing will vary.

Importantly, this summary is being provided as a helpful reference and does not endorse any particular software product and is not intended to provide an all-encompassing inventory of features and considerations. Provider agencies are encouraged to explore software options to decide which product best meets their individual agency's needs/preferences. Agencies are also recommended to seek the expertise of information technology specialists to both identify platforms that are appropriate their agency and implement the selected platform(s) once a decision is made.

Platform	Key Functions	Privacy Status	Category Compatibility
Monday.com	<ul style="list-style-type: none"> Customizable workflows Project management Automation Collaboration tools Data dashboards Integration capabilities CRM functionality 	 HIPAA-compliant plans available	<ul style="list-style-type: none"> Clinical: Client tracking, service metrics, quality outcomes Financial: Revenue tracking, billable time management Workforce: Recruitment tracking, staff feedback collection Organizational: Data infrastructure capabilities
Power BI*	<ul style="list-style-type: none"> Data integration Data analysis Interactive reporting Dashboard creation Data transformation Data source connectivity 	 Can be configured for HIPAA-compliance	<ul style="list-style-type: none"> Clinical: Outcomes measurement, quality metrics Financial: Revenue and expenditure analysis Workforce: Workforce gaps analysis, retention metrics Organizational: Community reach tracking
Zoho	<ul style="list-style-type: none"> Data integration Task tracking Gantt charts Time tracking Reporting tools CRM functionality Automation capabilities 	 Must setup Business Associate Agreement	<ul style="list-style-type: none"> Clinical: Client tracking, service management Financial: Financial reporting, tracking Workforce: Workforce management Organizational: Process management
Trello	<ul style="list-style-type: none"> Task organization (Boards, Lists, Cards) CRM functionality Drag-and-drop interface Integration with other tools Customizable workflow 	 Must setup Business Associate Agreement	<ul style="list-style-type: none"> Clinical: Client tracking Financial: Financial tracking Workforce: Recruitment tracking, training tracking Organizational: Process management
Tableau*	<ul style="list-style-type: none"> Data visualization Data analysis Interactive dashboards Data storytelling Decision support tools Data transformation 	 Must setup Business Associate Agreement	<ul style="list-style-type: none"> Clinical: Quality outcomes tracking, patient feedback analysis Financial: Financial trend analysis, payment tracking Workforce: Workforce gaps analysis Organizational: Community reach tracking
ClickUp	<ul style="list-style-type: none"> Task management Document handling 	 Must setup Business	<ul style="list-style-type: none"> Clinical: Client management, outcomes tracking Financial: Billable time tracking, expense tracking

	<ul style="list-style-type: none"> • Goal setting and tracking • Time tracking • Automation tools • Integration capabilities 	Associate Agreement	<ul style="list-style-type: none"> • Workforce: Goal setting, training management • Organizational: Process documentation, tracking
Wrike	<ul style="list-style-type: none"> • Task management • Gantt charts • Time tracking • Real-time collaboration • CRM functionality • Custom workflows • Data integration 	 Must setup Business Associate Agreement	<ul style="list-style-type: none"> • Clinical: Care coordination, service tracking • Financial: Billable time tracking, expense tracking • Workforce: Training management, retention tracking • Organizational: Process management
Airtable	<ul style="list-style-type: none"> • Customizable database tables • Multiple view options • Data Integration • Workflow automation • CRM functionality • Team collaboration 	 Must setup Business Associate Agreement	<ul style="list-style-type: none"> • Clinical: Client tracking, service management • Financial: Financial tracking • Workforce: Training documentation, recruitment tracking • Organizational: Intake/discharge process management
Asana	<ul style="list-style-type: none"> • Task tracking • Team collaboration • Timeline visualization • Workflow management • CRM functionality • Multiple integrations 	 Not HIPAA compliant	<ul style="list-style-type: none"> • Clinical: Limited due to compliance issues • Financial: Financial tracking • Workforce: Documentation, collaboration • Organizational: Documentation, process management
Notion	<ul style="list-style-type: none"> • Note-taking • Database functionality • Calendar management • Task tracking • CRM capabilities • Team collaboration tools • Data integration 	 Not HIPAA compliant	<ul style="list-style-type: none"> • Clinical: Limited due to compliance issues • Financial: Financial tracking • Workforce: Documentation, collaboration • Organizational: Process management