Introduction to HEDIS 2018

Presented by:
Megan D. Wilson, HEDIS Program Manager, PHC
Rita Young, Chief Operations Officer, HDVI
Lynn Thomas, Director of Business Development, HDVI
To avoid echoes and feedback, we request that you use the telephone instead of your computer microphone for listening/talking during the webinar.
Webinar Instructions

- All participants have been muted to eliminate any possible noise interference/distraction.

- If you have a question or would like to share your comments during the webinar, please type your question in the “question” box or click on the “raised hand” icon.
Objectives

• Overview of HEDIS
• HDVI Record Retrieval
• Contacts & Resources
• Q&A
Overview

• What is HEDIS?
  • Healthcare Effectiveness Data Information Set
  • Administrative vs. Hybrid Measures

• Why is HEDIS Important?
  • Evaluates clinical quality in a standardized way
  • Identifies opportunities for improvement
  • Regional-level performance is publicly reported
  • Regional-level reporting is required by the State
  • HEDIS/CAHPS equates to 50% of NCQA Accreditation Score
Overview

**Southeast:** Solano, Yolo, Napa

**Southwest:** Sonoma, Marin, Mendocino, Lake

**Northeast:** Lassen, Modoc, Siskiyou, Trinity, Shasta

**Northwest:** Humboldt, Del Norte
Measure Reporting Methodology:

• Administrative Measures
  • Measures the entire eligible population
  • Data collected through transaction data or other administrative data used to identify the eligible population and numerator (i.e. Claims/encounter)

• Hybrid Measures
  • Measures a statistically significant *sample* of the eligible population
  • Data collected from transaction data or other administrative data and key data elements collected from the medical record chart
## Overview

<table>
<thead>
<tr>
<th>Measure Type</th>
<th>Measure</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hybrid</td>
<td>Cervical Cancer Screening (CCS)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Childhood Immunization Status (CIS-Combo 3)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Comprehensive Diabetes Care (CDC)</td>
<td>• Blood Pressure Control (&lt;140/90 mmHg)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Eye Exam</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HbA1c Testing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HbA1c Poor Control (&gt;9.0%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HbA1c Good Control (&lt;8.0%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Medical Attention for Nephropathy</td>
</tr>
<tr>
<td></td>
<td>Controlling High Blood Pressure (CBP)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Immunizations for Adolescents (Combo 2)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Prenatal and Postpartum Care (PPC)</td>
<td>• Timeliness of Prenatal Care</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Postpartum Care</td>
</tr>
<tr>
<td></td>
<td>Weight Assessment &amp; Counseling for Nutrition &amp; Physical Activity for</td>
<td>• Counseling for Nutrition</td>
</tr>
<tr>
<td></td>
<td>Children and Adolescents (WCC)</td>
<td>• Counseling for Physical Activity</td>
</tr>
<tr>
<td></td>
<td>Well-Child Visits in the 3(^{rd}), 4(^{th}), 5(^{th}), &amp; 6(^{th})</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Years of Life (W34)</td>
<td></td>
</tr>
</tbody>
</table>
• Measures
  • IMA Combo-2: 2 dose HPV vaccine
  • Replaced the Behavioral Health CDF for DSF

• NCQA Timeline
  • MR project stops **May 9th**

• Retrieval Methods
  • On-site and Provider Methods: Health Data Vision, Inc. (HDVI)
  • EMR Remote Access: KDJ Consultants, Inc. (KDJ)
2018 HEDIS Medical Record Retrieval

November 7, 2017
CONFIDENTIAL
Today’s Agenda

- Introductions
  - Rita Young, COO
  - Brendan Mannion, Customer Success Manager
  - Kevin Owens, VP of Product
  - Lynn Thomas, Director of Business Development

- Health Data Vision (HDVI) Company Overview
- PHC & HDVI’s Partnership
- HDVI’s Approach & Key Information
- Q&A
Mission: Give CMO’s an enterprise class SaaS solution to lead their plans in the transition to Value-Based care.

Vision: Deliver a medical record workflow platform that connects Payors, Providers to ensure
- Payors are recognized for providing quality care programs
- Providers can efficiently support their obligations for documenting member encounters
HDVI Company/Retrieval Facts

- Founded 2009 to provide Quality and Risk solutions to health plans
- Corporate office located in Glendale, CA
- 2017 collected medical records from 80,000* locations in all 50 states plus Puerto Rico
- 2017 contacted over 227k unique providers/addresses across all projects
The Team Driving HDVI

**Jay Ackerman, President & CEO**
- Formerly Exult, WNS, ServiceSource,
- Strong scaling background
- Public company executive

**Mike Curran, VP Quality**
- 25 years in Managed Care
- National director for Clinical Performance Improvement at United Healthcare
- Director of Policy with NCQA

**Kevin Owens, VP of Product**
- 18 years experience in Enterprise B2B SaaS Product Management
- Heavy Cloud and User Experience

**Gregg Morin, VP Sales**
- 25 years of sales & customer success experience
- Formerly with Guidance Software, EMC Corporation & Infor Global Solutions

**Jay Ackerman, President & CEO**
- Formerly Exult, WNS, ServiceSource,
- Strong scaling background
- Public company executive

**Rita Young, COO**
- 16+ years of Clinical leadership across HEDIS & Risk
- Experienced scaling a prominent chart retrieval and abstraction operation

**Jason Colbert, SVP Technology**
- 20+ years of software experience
- Strong scaling background
- Public co executive

**Bryan Lee, VP Payer Solutions**
- 25+ years of Managed Care experience
- Dir. of Medicare Program Mgmt. at Regence BCBS
- Co-founder of Galileo Healthcare Analytics Platform

**Ryan Johnson, VP of Data Operations**
- 20+ years experience in HC
- Proven success with cross-platform integrations
- Process focused

**Lynn Thomas, Director Business Development**
- 30+ Years in HC
- Experienced working with Payers to employ technology-driven solutions
- Client-centric focus

**Bryan Lee, VP Payer Solutions**
- 25+ years of Managed Care experience
- Dir. of Medicare Program Mgmt. at Regence BCBS
- Co-founder of Galileo Healthcare Analytics Platform

**Rita Young, COO**
- 16+ years of Clinical leadership across HEDIS & Risk
- Experienced scaling a prominent chart retrieval and abstraction operation

**Lynn Thomas, Director Business Development**
- 30+ Years in HC
- Experienced working with Payers to employ technology-driven solutions
- Client-centric focus

**Bryan Lee, VP Payer Solutions**
- 25+ years of Managed Care experience
- Dir. of Medicare Program Mgmt. at Regence BCBS
- Co-founder of Galileo Healthcare Analytics Platform

©2017 Health Data Vision, Inc. Proprietary and Confidential
Why PHC Partnered with HDVI

- **Coverage:**
  - Partner with strong ability in provider coverage for field retrieval
  - Experienced in retrieving from challenging geographies, similar to PHC’s service area
  - Understanding of service area challenges, i.e. rural, remote, small community, weather conditions, distance and logistics

- **Expertise:**
  - Commitment to quality interactions with providers
  - Support multiple methods of retrieval
  - Extensive experience working with various EMR’s

- **Results:**
  - Timeliness – 100% completion by 4/16/2018
HDVI Security

100% Commitment to No PHI Violations

- Secure Data Collection from Providers
  - Medical Record Data securely collected from Providers via Secure FTP, Secure Fax, Mail, SVP and by Field Techs. All of these methods utilize secure connections at each point.
  - All Field Tech laptops are encrypted and can be remotely wiped if lost. No other PHI is stored on HDVI laptops or desktops.

- Data Secured within MRCS
  - Data within MRCS is hosted in a HIPAA controlled environment that is hosted by IBM Softlayer.
  - Vulnerability tests are running nightly and penetration tests tests are run regularly on MRCS.
MRCS Supports Multiple Retrieval Methods

- Print/Scan
- Faxing
- SVP (Secure Virtual Print)
- Chart Upload
- Field Techs
- Mailing

Secure Virtual Print (SVP)

Medical Record Chart Upload (Single / Bulk)
Provider Requirement Considerations for Retrieval

- **Secure Virtual Print (SVP)**
  - Provider registration online or with HDVI Scheduling Team
  - Download of print driver on Provider’s computer
  - HDVI-supplied access to HDVI portal

- **Use of Encrypted Flash Drives**
  - Provider approval required

- **Need for Access Forms**
  - Discussion between Provider site and HDVI on initial call to establish requirements

- **Preparation of Medical Records for On-Site Retrieval**
  - Discussion between provider site and HDVI on initial call
  - HDVI is happy to assist with pulling and replacing medical records as allowed by Provider site
Retrieval Staff – Outbound Calling

Provider Service Representatives (PSRs)

- PSRs will make outbound calls to provider locations in an attempt to schedule site for chart retrieval
- Introduce themselves as calling from HDVI on behalf of Partnership HealthPlan of California
- Make sure to connect verbally with the appropriate person to schedule the medical record request
- Confirms with location that the provider practices at the location and that the provider’s charts remain at the location, the site address, phone number, fax number, hours of operations and preferred method for HDVI to retrieve the records
- Documents all calls and call attempts in the HDVI scheduling system
- Comprehensive tracking of date, time, conversation and whom HDVI spoke with for every call made
- Fax, mail or secure emails the provider documentation package to the provider site
Provider documentation package will consist of:

- Partnership HealthPlan of California provider letter
- Member Pull-list
- Required documents that will be scanned

If the appointment is scheduled for a field technician to come on-site, HDVI will also call the provider location 24 to 48 hours prior to the appointment as a reminder to expect the field technician.
HDVI Retrieval Staff

- HDVI W2 Employees (not contract workers)
- Must complete extensive training program that is based on medical record documentation recognition
- Minimum of one year reviewing medical records
- Minimum of high school graduate
What to Expect - On-Site Retrieval Staff

- HDVI staff will arrive at appointment on-time and will be prepared to retrieve medical records. In the event there is a delay, the provider location will be notified via phone by the PSR staff.

- Field technician will have HDVI identification, as well as driver’s license to show proof of employment.

- Field technician will arrive dressed in a HDVI approved shirt which contains the HDVI logo.

- Field technician will have the following equipment and items:
  - Scanner and laptop for scanning in the medical record
  - Member list associated with retrieval from that specific provider site
  - Any requested items from location such as paper replacement, etc.
Fax
If providers choose to fax documents back to HDVI, please include the member specific coversheet as the top page of each member’s medical record. The document contains a barcode which allows the member’s medical record to automatically be uploaded into the HDVI application. The requested turn around time is 3 to 5 business days from the date of the initial call. In the event the records are not received in the agreed upon time frame, the providers are given a reminder call.

Mail
If providers choose to mail documents back to HDVI, please include the member specific coversheet as the top page of each member’s medical record. The document contains a barcode which allows the member’s medical record to automatically be uploaded into the HDVI application. The requested turn around time is 5 to 10 business days from the date of the initial call. In the event the records are not received in the agreed upon time frame, the providers are given a reminder call.
HDVI - Ask of Providers

On-site Retrieval Field Technician

- Please provide HDVI with a contact name for field technician to ask for once they arrive on-site for retrieval.

- Please provide space for field technician to scan the medical record documents. Technician will arrive with a scanner and laptop for your space considerations.

- If Technician is required to make copies of the medical record prior to scanning (based on unique provider locations), HDVI request Technician be close to printer if possible.

- If your site has paper medical records between 1/1/2013 and 12/31/2017, please make sure to inform the HDVI scheduling staff about the process to gain access for retrieval.
Provider Relations, HDVI

If for any reason the provider needs to reach HDVI the contact information can be found on the provider package that is faxed to the location. Additionally, we have placed the information below:

Heath Data Vision, Inc., 425 W. Broadway, Suite 100, Glendale, CA 91024

Fax 855-252-7704

Provider Relations Phone 855-454-6182
Example of Request for Medical Record

To: <XXXX Health Care Services>  
From: Michael Curran

Phone: <(XXX) X010111>  
Date: 9/21/2017

Fax: <(XXX) X010101>

REQUEST FOR MEDICAL RECORDS

Due to the time sensitive nature of this review, we kindly request that you please verify that the patients on the enclosed list have been seen at your office during the indicated review period and that you fax or mail your records as soon as possible. For your convenience our fax number and mailing address is listed below.

Since we are the authorized collection agent for the corresponding health plans (see following pages), we ask that you contact us directly with your questions by calling: HDVI Provider Relations at (855) 454-6182. If you have received this communication in error, immediately contact us at the number above.

If you are faxing only fax to: (855) 252-7704

If you are mailing send only to this specific address:
Health Data Vision, Inc., 425 W. Broadway, Suite 100, Glendale, CA 91024
Example of Member Pull List

PATIENT LIST

Address ID: 167
Address: XXX00 Address1 Ave
           CityName, StateName Zip
Primary Contact: SHANELL RELEASE OF INFORMATION
Phone: PrimaryPhoneNumber
Fixed Appointment: 09/21/2017
Days / Hours:
EMR System: EMR Name
Field Tech Notes:
Chase Qty: 1

<table>
<thead>
<tr>
<th>MBR LNAME</th>
<th>MBR FNAME</th>
<th>MBR DOB</th>
<th>PROVIDER</th>
<th>MEASURE</th>
<th>REVIEW PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>LastName</td>
<td>FirstName</td>
<td>1/1/2016</td>
<td>Measure</td>
<td></td>
<td>09/21/2017 to 09/21/2017</td>
</tr>
</tbody>
</table>
## Example of Documentation Requirements

**HEDIS Documentation Checklist**

**<Sample Measure> <Measure Description>**

Review Period:  <Review Period>

<table>
<thead>
<tr>
<th>Address ID: 167</th>
<th>Chase ID:  &lt;Sample Chase Id&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Name: FirstName</td>
<td>Member DOB: 09/21/2017</td>
</tr>
<tr>
<td>Provider Name: Provider Name</td>
<td>Provider Phone: (XXX) 0101010</td>
</tr>
<tr>
<td>Gender: &lt;M&gt;</td>
<td>&lt;Date Of Delivery:&gt;</td>
</tr>
</tbody>
</table>

Please send photocopies of medical record documentation (from the Review Period):

- [ ] REQUIRED DOCUMENTATION:  (Please ✓ check box indicating submitted or not avail)  Not avail
  - Vital Signs Flow Sheet - Most Recent 2017  
  - BMI Flowsheet 2016 - Current  
  - BMI Grid 2016 and 2017  
  - Progress Note/Office Visits 2016 - Current

If all Required Documentation is submitted, Supplemental Documentation is not needed. If Required Documentation is not complete, please provide all that is available & include the following:

- [ ] SUPPLEMENTAL DOCUMENTATION:  (Please ✓ check box indicating submitted or not avail)  Not avail
  - Master Problem List  

©2017 Health Data Vision, Inc. Proprietary and Confidential
Eureka   |   Fairfield   |   Redding   |   Santa Rosa

HEDIS 2018 Timeline

Primary Medical Record Retrieval & Review

Week of Feb. 12th
HDVI will call providers to schedule retrieval

May 9th
Stop all retrieval and review

Final rates locked and reported to DHCS

Secondary Medical Record Collection

Medical Record Review Validation Audit
May 11th -15th

May 9th - 15th

Final rates locked and reported to DHCS

February | March | April | May | June | July | August

February
Week of Feb. 12th
HDVI will call providers to schedule retrieval

March
Secondary Medical Record Collection

April

May
Medical Record Review Validation Audit
May 11th -15th

June
Final rates locked and reported to DHCS

July

August
HEDIS 2018 Performance shared with Provider Network
Roles & Responsibilities

• Providers
  • Complete the Annual Provider Information form
  • Indicate your Primary and Secondary Contacts

• HDVI
  • First Point of Contact for On-site and Provider Method Retrieval
    • Scheduling
    • Questions

• PHC’s HEDIS Team
  • Support providers and HDVI to successfully retrieve medical records timely
PHC’s HEDIS Website

- [http://www.partnershiphp.org/Providers/Quality/Pages/HEDISLandingPage.aspx](http://www.partnershiphp.org/Providers/Quality/Pages/HEDISLandingPage.aspx)
- HEDIS 2017 Performance
- Link to Annual Provider Information Form
- HEDIS FAQs
- Upcoming Events and Activities
- Measure definitions and documentation requirements

NCQA Website

EMR Remote Retrieval Webinar

PHC is highly encouraging our provider sites to select EMR Remote Retrieval as it significantly reduces the amount of resources required from the provider site for HEDIS 2018.

This webinar will provide a comprehensive overview of EMR Remote Retrieval process and our EMR Remote Retrieval vendor. We encourage all provider sites interested in EMR Remote Access to join us!

**Date:** Thursday, November 9

**Time:** Noon - 1 p.m.

**Register:** [https://attendee.gotowebinar.com/register/5669800319379182851](https://attendee.gotowebinar.com/register/5669800319379182851)
Contact Us

HDVI Provider Support Line
• Phone: (855) 454-6182
• Fax: (855) 252-7704

For all other questions please contact the PHC HEDIS Team:
• Phone: (866) 828-2302
• Fax: (707) 863-4314
• Email: HEDISMRA@partnershipphp.org
Questions?