# ECM Provider & Partnership Reporting Training

**Updated**

January 2024

# Agenda

- ## Enhanced Care Management (ECM) Reporting Templates
  - Member Information File (MIF)
  - ECM Provider Return Transmission File (RTF)
  - ECM Provider Initial Outreach Tracker File (IOT)
  - Provider Capacity Survey
  - PointClickCare

- ## Reporting Schedule & Frequency

- ## Issues & Troubleshooting

# ECM Provider Trainings

### ECM Provider Reporting Training
- ecm@partnershiphp.org

### Provider Portal & TAR Training
- esystemssupport@partnershiphp.org

**ECM New Provider Trainings**

### PointClickCare Training
- lisa.craig@pointclickcare.com

### Claims Training
- claimsecmhelpdesksr@partnershiphp.org

# ECM Reporting Templates

# ECM Provider Trainings

- Partnership is responsible for sending each ECM provider a Member Information File containing clinical and non-clinical information for **newly referred/continuing** members that will aid the provider in assisting members with their care needs.

- Information provided in the templates are based on DHCS guidance.
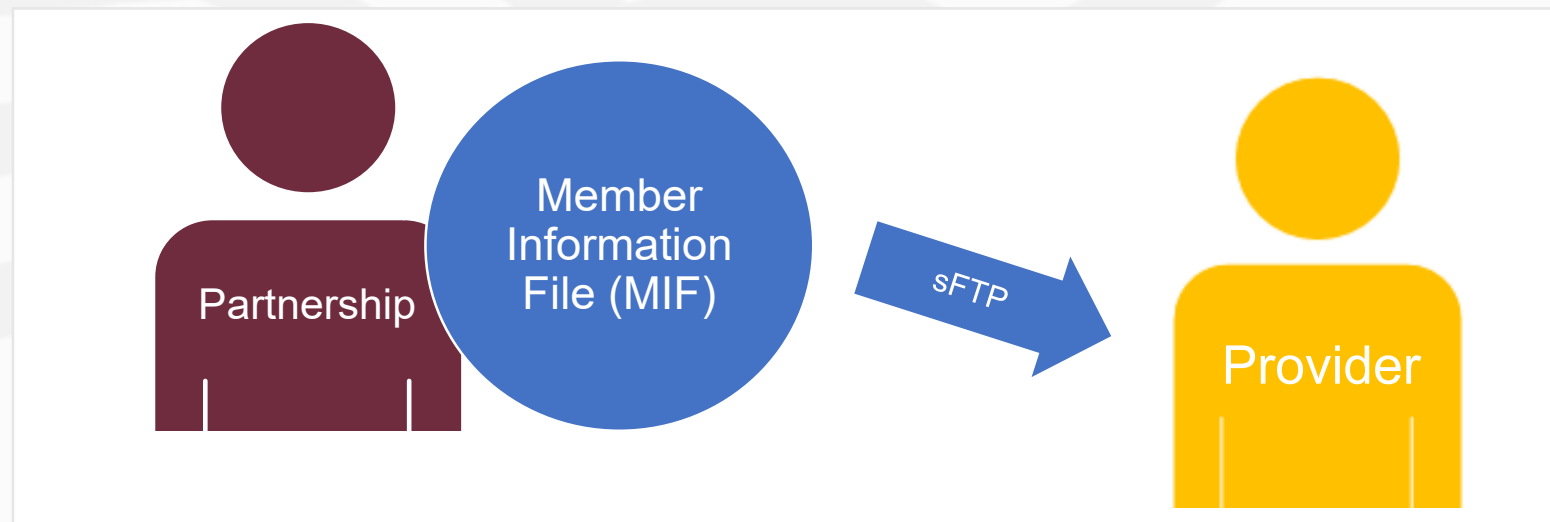
# ECM Provider Return Transmission File (RTF)

- 1 of 2 files the ECM provider is responsible for per DHCS guidelines.

- The members who need to be present on the file are any newly referred/continuing members from the MIF and members the provider has identified as eligible.

- The provider will document successful and unsuccessful encounters and outreaches for enrolled members only.

- In order to get accurate and efficient data exchanges, **all** fields should be completed with the appropriate entry specifications listed on the templates.
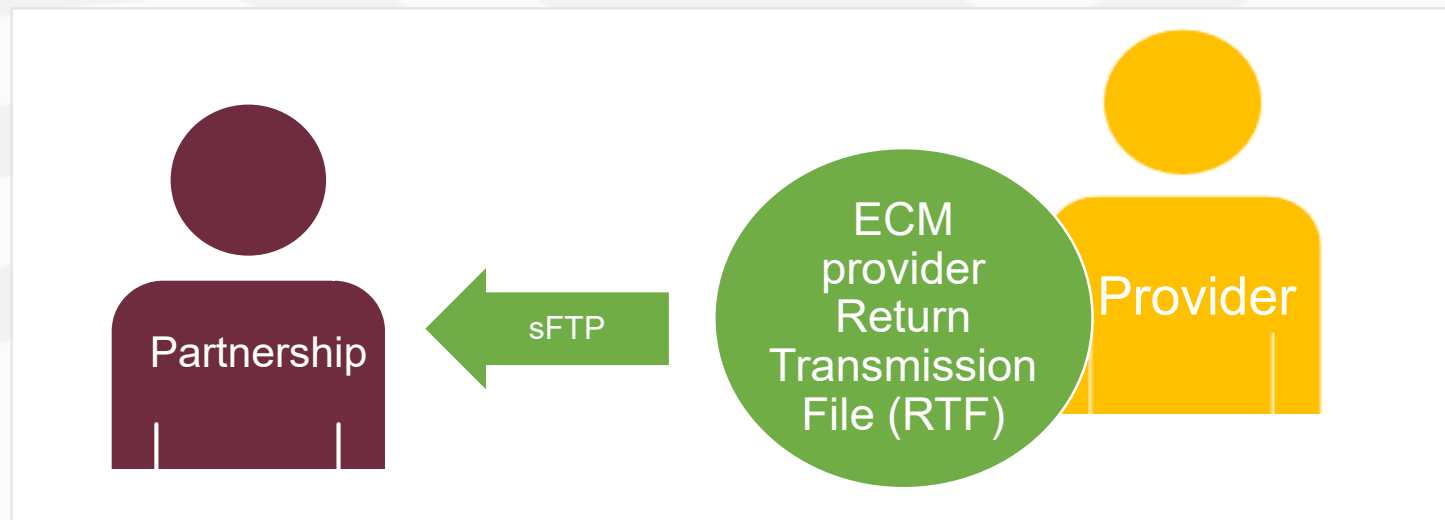
# ECM Provider Initial Outreach Tracker File (IOT)

- 2 of 2 files the ECM provider is responsible for per DHCS guidelines.

The IOT is the ECM providers' responsibility to enter data for any members identified during outreach attempts.

- o Pending Outreach (Referred members on MIF)
- o Currently In Outreach
- o Provider Identified Referrals

- Each attempt should be captured on a separate line.
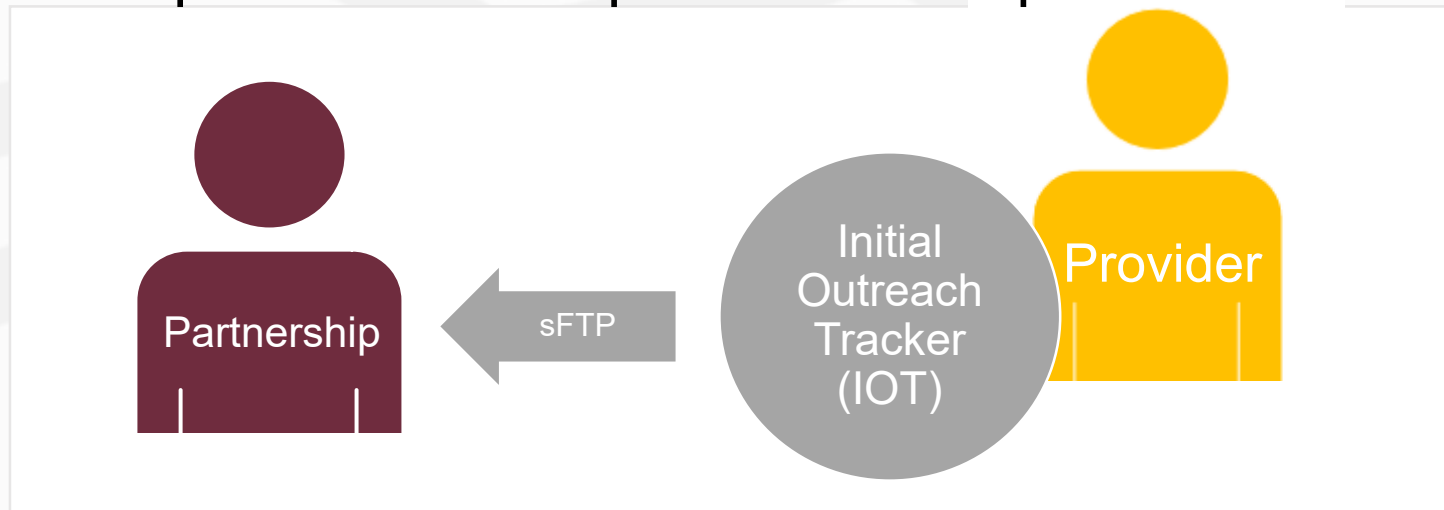
# Capturing Member Outreach and Encounters Workflow
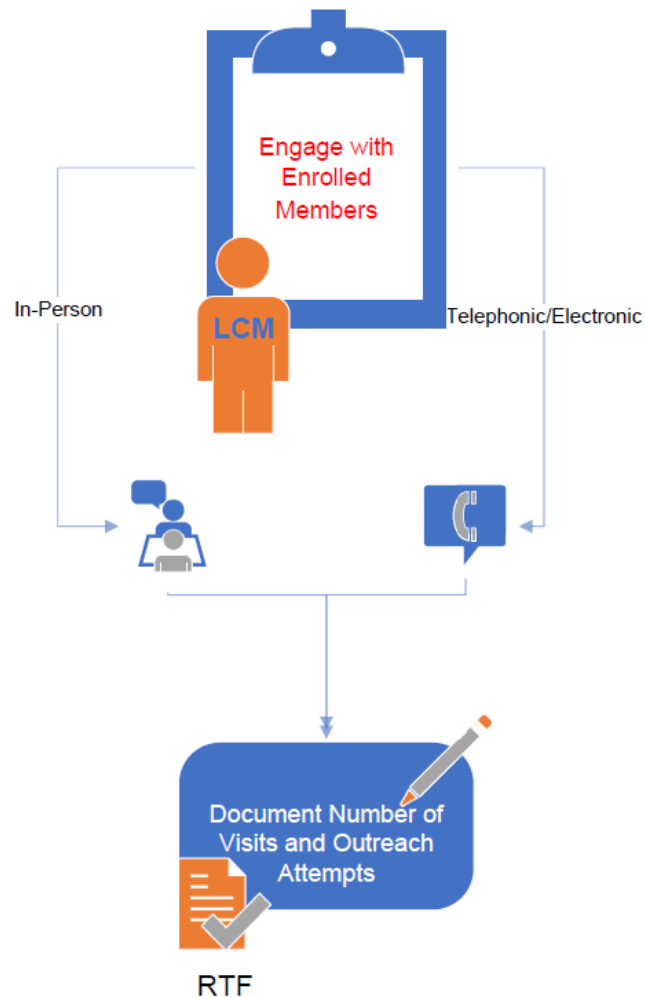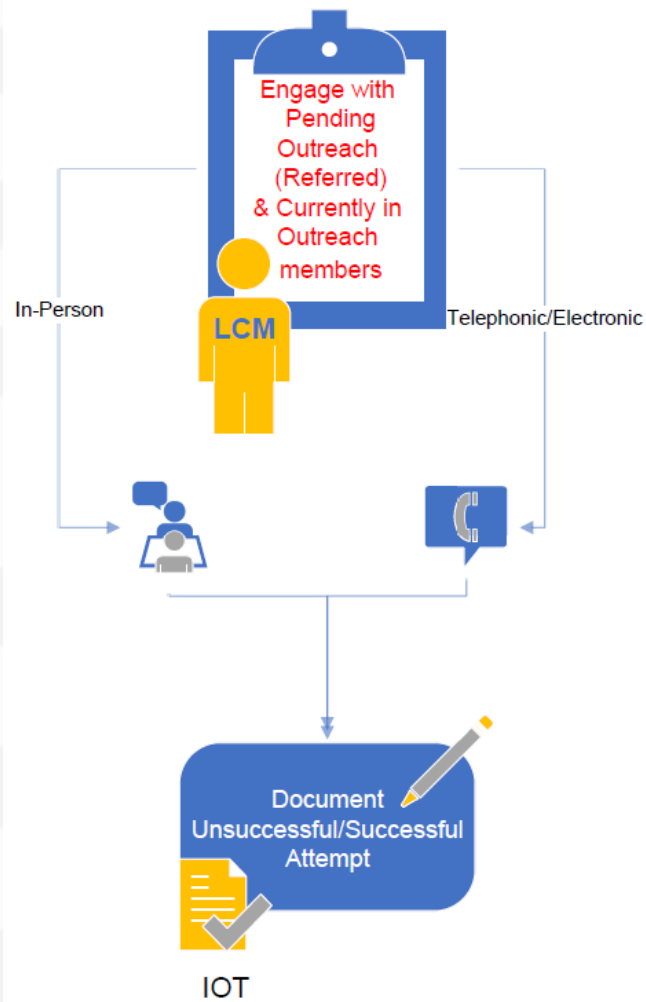


**IOT Process:**

Pending Outreach (Referred) and Currently in Outreach Members -not enrolled in ECM

LCM reaches out to engage member via in-person or telephonic/electronic

LCM documents on the IOT:

- CIN
- First Name
- Last Name
- Date of Birth
- Staff Member Type (1 or 2)
- Date
- In-Person or Telephonic/Electronic
- Successful or Unsuccessful

These are successful and unsuccessful outreach attempts

**RTF Process:**

Enrolled Members

LCM tracks successful encounters with the member

Documents on the RTF number of Visits and Outreach Attempts via in-person and/or telephonic/electronic

# Provider Capacity Survey

- Partnership will send the Provider Capacity Survey via Google Docs to track ECM provider capacity.

- The ECM provider will complete the survey and Partnership will analyze the results to help assist with next months referral count.

Provider Capacity Survey Results

Google Docs

Partnership

Provider

Google Docs

Partnership

Provider Capacity Survey
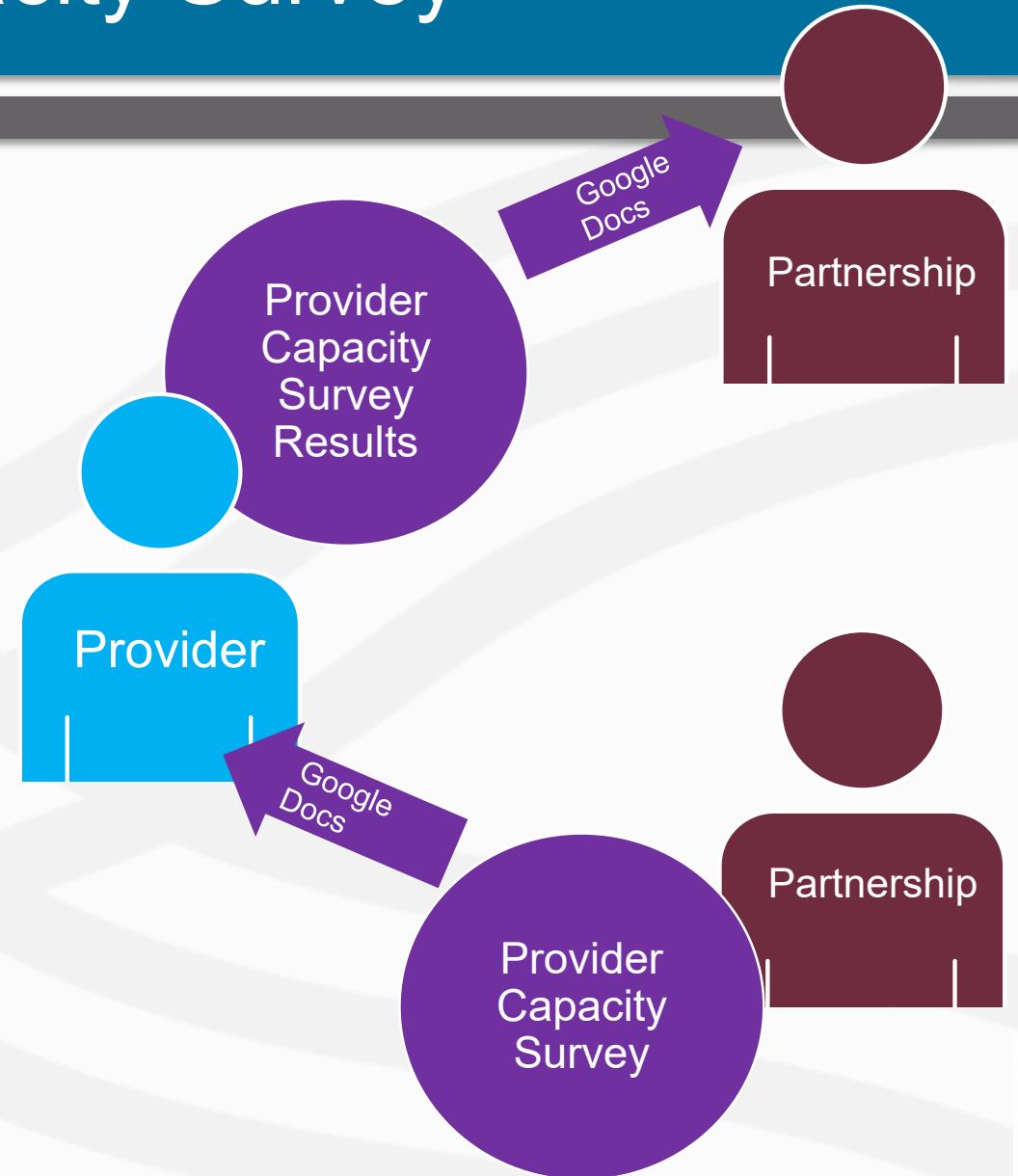
# PointClickCare

- ## What is PointClickCare (PCC)?
  - o A Health Information Exchange System to view hospital encounter data for PointClickCare affiliated hospitals and provide documents for data sharing. Our ECM providers are required to contract with PointClickCare for ECM. Partnership does pay for the licensure fee so it is no cost to your organization

- ## Potential ECM Members
  - o ECM providers can view members deemed eligible for ECM in PointClickCare to ensure member is not already engaged with another ECM provider prior outreach.

- ## Which members are present in PointClickCare?
  - o ECM team ensures all new and continuing members are present under provider's PCC portal.

# PointClickCare

- All members in provider's PCC portal will be listed under 1 of 3 member statuses:
  - ECM Pending Outreach
    - Member is potentially ECM Eligible and has been referred for ECM Services
  - ECM Currently In Outreach
    - Member is Eligible and Approved, and Outreach has begun
  - ECM Enrolled
    - ECM Member Engagement has started and a TAR has been submitted and approved via the Partnership provider portal.
      - **ROI and Care Plan must be uploaded to member's profile in PointClickCare within 60 days of TAR request date.**

Reporting Schedule and Frequency

# ECM Provider Reporting Schedule

| Report and Naming Convention | Due Date | Responsible Party |
|---|---|---|
| • Targeted Engagement List **(TEL)** (via PointClickCare)<br>• Partnership sends Member Information File **(MIF)** (via sFTP)<br>   • Facility Name_ECM - MIF_Date<br>• Email sent to providers notifying upload has occurred | First week of the month | **Partnership** |
| • ECM Provider Return Transmission File **(RTF)**<br>(File sent via sFTP Folders)<br>   • Facility Name_ECM - RTF_Date<br>• ECM Provider Initial Outreach Tracker File **(IOT)**<br>(File sent via sFTP Folders)<br>   • Facility Name_ECM - IOT_Date<br>• Potential ECM Member Referral File (Optional) | Reference calendar below | **ECM Provider** |
| • Data Analysis, Review, and Screening<br>   • Communicate discrepancies found on files (via email)<br>• Provider Capacity Survey (Google Forms survey via email link) | Third week of the month | **Partnership** |
| • Provider Capacity Survey Due | Reference calendar below | **ECM Provider** |
| • Create new MIFs and TELs and prepare next month's Capacity Survey | Fourth week of the month | **Partnership** |

# Reporting Due Dates

| | January | | | | | |
|---|---|---|---|---|---|---|
| **S** | **M** | **T** | **W** | **T** | **F** | **S** |
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | **9** | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

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| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
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| | August | | | | | |
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| | September | | | | | |
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| | October | | | | | |
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| | November | | | | | |
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| | December | | | | | |
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| 8 | **9** | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

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PARTNERSHIP HEALTHPLAN of CALIFORNIA
A Public Agency

# Capacity Due Dates

Issues and Troubleshooting

# Issues and Troubleshooting

- For issues or questions related to the reporting templates, submissions via the sFTP folders, or any other issues, please reach out to:

  [ECM@partnershiphp.org](mailto:ECM@partnershiphp.org)

- Partnership will assist with any troubleshooting issues that may arise.

# Questions?

- Please reach out to [ECM@partnershiphp.org](mailto:ECM@partnershiphp.org) for any questions you may have following this presentation.