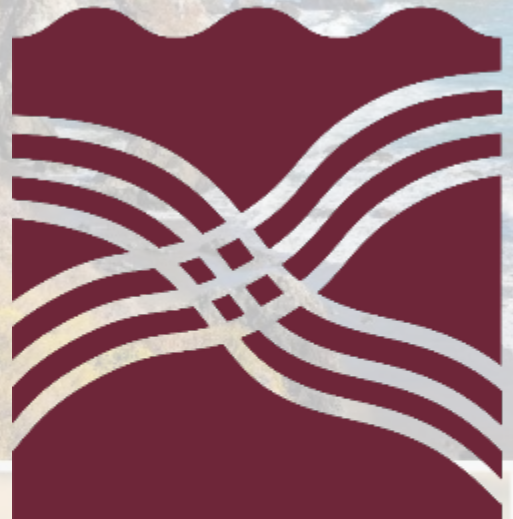


PARTNERSHIP



HEALTHPLAN
of CALIFORNIA
A Public Agency



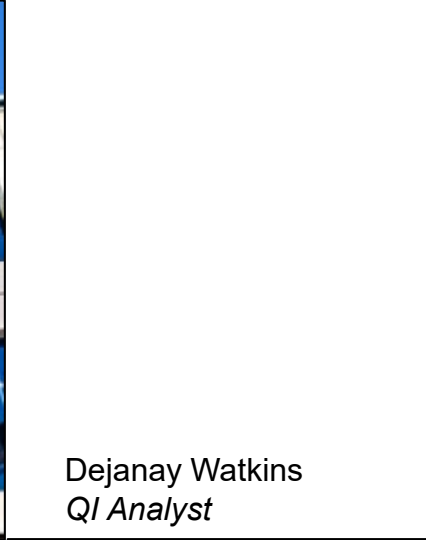
Provider Medical Record Collection Overview

Partnership HEDIS Team
August 14, 2024

HEDIS Team



Sue Quichocho
*Manager of Quality
Management*



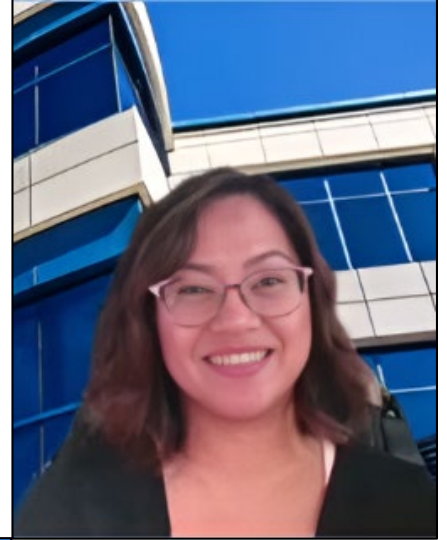
Dejanay Watkins
QI Analyst



Lola Powell
QI Analyst



Martha Layne, RN
*Supervisor of HEDIS
Clinical*



Jordan Sumodobila,
Pharm D.
Clinical Lead



HEDIS Team



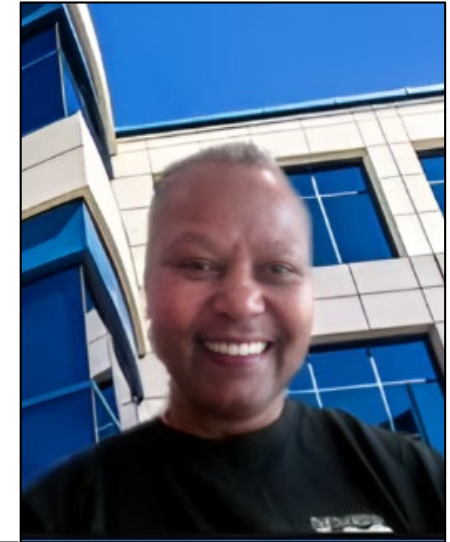
Megan Shelton
Senior Program Manager

Cheyenne Gains
Program Coordinator II



Tegan Spencer
Program Manager II

Michael Langley
Project Coordinator II



Cassandra Chambers
Program Manager I





Agenda

- Overview of HEDIS
- Medical Record Retrieval
 - Partnership retrieval
 - KDJ EMR remote retrieval
- Roles and responsibilities
- HEDIS Timeline
- Resources and contacts





HEDIS Office Hours Schedule

Title	Date	Topics	
<u>Introduction to HEDIS</u>	07/17/2024	<ul style="list-style-type: none"> • HEDIS Overview • Reporting Populations • County Level Oversample • Administrative, Hybrid and ECDS Measures 	<ul style="list-style-type: none"> • Data Collection vs Medical Record Collection • HEDIS Timeline
<u>HEDIS Office Hours</u>	07/31/2024	Have a HEDIS question? Join us for an open forum Q&A.	
<u>Provider Medical Record Collection Overview</u>	08/14/2024	<ul style="list-style-type: none"> • Why do we collect records? • How do we access and collect records? • Who collects the records? 	
<u>HEDIS Office Hours</u>	08/28/2024	Have a HEDIS question? Join us for an open forum Q&A.	
<u>TBD</u>	09/18/2024		
<u>MY2023 Annual Summary of Performance</u>	10/30/2024	<ul style="list-style-type: none"> • HPA (Health Plan Accreditation) 	<ul style="list-style-type: none"> • Managed Care Accountability Set (MCAS)
<u>Hybrid Measure Overview</u>	11/13/2024	<ul style="list-style-type: none"> • Overview of Hybrid measures • HPA (Advent Advisory) vs MCAS (HSAG) 	<ul style="list-style-type: none"> • BPD**, CBP, CCS, CIS, EED**, HBD, IMA, LSC+, PPC, WCC-BMI**



About Us



Mission:

To help our members, and the communities we serve, be healthy.

Vision:

To be the most highly regarded managed care plan in California.

HEDIS Overview

HEDIS stands for:

- Healthcare Effectiveness Data and Information Set

Why does HEDIS exist?

- HEDIS is a measurement tool maintained by the National Committee for Quality Assurance (NCQA).
- HEDIS is used to evaluate clinical quality in a standardized way.
- The California Department of Healthcare Services (DHCS) and NCQA selects a subset of measures for Medi-Cal plans to report on annually as required for State and NCQA Accreditation reporting.
- DHCS and NCQA uses annual HEDIS performance reporting to evaluate the delivery of quality care and services to its members.

Measurement Year vs. Reporting Year

- Measurement Year (MY) – The previous calendar year, but could include a longer look-back period depending on the measure specifications.
- Reporting Year (RY) – The year the data is collected and reported to DHCS and NCQA.

Measure Reporting Methodology:

- Administrative Measures
 - Measures the entire population
 - Data is collected through transaction data or other administrative data used to identify the eligible population and numerator (i.e. claims/encounter data).
- Hybrid Measures
 - Measures a statistically significant *sample* of the eligible population.
 - Data collected from transaction data or other administrative data and key data elements are collected from the medical record chart.

Hybrid Measure Overview

Hybrid Measure Names

BPD* – Blood Pressure Control (<140/90) for Patients with Diabetes

CBP – Controlling High Blood Pressure

CCS – Cervical Cancer Screening

CIS-10 – Childhood Immunization Status Combo 10

EED* – Eye Exam for Patients with Diabetes

GSD – Glycemic Status Assessment for Patients with Diabetes

IMA-2 – Immunizations for Adolescents Combo 2

LSC** – Lead Screening for Children

PPC – Timeliness of Prenatal Care and Postpartum Care

WCC-BMI* – Weight Assessment & Counseling for Nutrition and Physical Activity for Children & Adolescents – BMI Percentile – Total

*HPA/Accreditation Reporting only

**MCAS/DHCS Reporting only



Medical Record Retrieval





Types of Retrieval

- **Remote Collection**

- Records collected electronically from Provider EMR (Electronic Medical Record)
- KDJ Consultants

- **Client Collected**

- Partnership staff will reach out to your office requesting specific member records
 - ShareFile sFTP
 - Fax

- **Market Collected**




- Third Party Vendor who collects records from the provider office.



Requested Documentation

Provider Information Form (PIF):

- Contact information (name, phone, email)
- Provider Office demographics
- EMR Used
- Signature Sheet (if applicable)


	MD, PhD
	MD
	MD, MBA



Requested Documentation

Medical Records Request:

- Member List
- Authorization Letter
- Measure Instruction sheet
- Demographics page

	MY2024/Ry2025 HEDIS® Study
Date Faxed: 02/26/2025 From: Tegan Spencer Call Back #: 530-999-6828	Provider Name: Main Street Clinic Contact Name: Sally Smith Provider Address: 123 Main St, Anywhere, CA Provider Fax: 530-999-6950
Additional Comments: Please return requested records by the agreed upon date of 03/15/2025.	

HEDIS® MY2024 - Member List

Member Name	DOB	Measure	Chase ID	PPC Delivery Date	If no record available, please note reason here.
Member 1	xx/xx/xx	CBP	123456		
Member 1	xx/xx/xx	CCS	123457		
Member 2	xx/xx/xx	CIS	123458		
Member 2	xx/xx/xx	LSC	123459		
Member 3	xx/xx/xx	IMA	123460		
Member 3	xx/xx/xx	WCC	123461		



ShareFile sFTP (preferred)

- Secure file sharing, direct upload of records.
- Enables real time view of records submitted for validation
- Reduces re-requests due to illegible records, failed faxes
- Recommended for submitting electronic records (PDF)

Fax

- Limited to providers with 15 charts or less

- Secure sFTP server owned by Partnership
- Email address is required
- Only those with permission can view/edit the folder
- Visit our HEDIS page: “[Learn More about HEDIS Medical Record Retrieval](#)” to find the ShareFile tutorial.

Provider Method Retrieval



For HEDIS MY2023, Partnership staff will request medical records from provider offices to be submitted via ShareFile or fax.
[Click here to view ShareFile for Providers](#)
[Click here to view ShareFile Tutorial](#)

Client Collection Retrieval Process

Outreach and Scheduling Client Collection Method:

1. Partnership Staff will outreach to identify appropriate retrieval method and establish a commitment date.

2. Partnership Staff will send the Provider Package via one of the following methods:

- ShareFile (email link to provider)
- Secure Email or Fax

3. Providers will submit medical record documentation using the agreed upon timeline and method:

- ShareFile – Upload records directly
- Fax – Fax to Partnership's HEDIS Fax line



KDJ Consultants Inc.

Contracted with Partnership to perform remote retrieval

Partnership and KDJ are partnering for a 8th HEDIS project

Certified Women-Owned Business (WBE) and SOC 2SM Certified Corporation

Established in 1995 and have been conducting HEDIS retrieval since 1997



KDJ Retrieval

KDJ reaches out to existing remote retrieval providers for testing in November



Partnership sends any new remote providers to KDJ for set-up and testing in November



KDJ conducts testing of provider's EMR from December to early February



KDJ begins HEDIS retrieval in mid-February and send out the provider package

HEDIS Roles and Responsibilities



Partnership's HEDIS Team Responsibilities

- The HEDIS Team partners with providers to select the best retrieval method and establish a due date.
- Follow-up with providers, as needed, for any retrieval or scheduling requests.
- Support providers and KDJ to successfully retrieve medical records timely.
- Provide support to resolve challenges, should any arise.

KDJ Responsibilities

- First point of contact for EMR Remote Retrieval and coordination of remote access testing.
- Provides a list of member's charts they need to access. (If the member chart is not available, please notify KDJ immediately.)
- KDJ nurse accesses Provider's EMR to review only specified charts and collect HEDIS data.
- Copies only medical record data to support HEDIS Measures.

Provider Responsibilities

- Respond timely to Partnership and KDJ outreach calls/emails or technical issues.
 - Partnership has less than 12 weeks to retrieve approximately 20,000 medical records.
- Complete any testing/certification requested by KDJ.
- Submit requested records to Partnership by the agreed upon date. Note any members whose chart is not available.
- Provide a Signature sheet for providers on staff.
- Inform Partnership of any delays or issues as they occur.



HEDIS Timeline





HEDIS MY2024 Timeline

Nov

- November 29, 2024 – Deadline for EMR Remote Access Forms
- KDJ Outreach for EMR Remote Access set-up and/or testing begins

Jan

- KDJ Outreach for EMR Remote Access set-up and/or testing ends

Feb

- Partnership and KDJ start sending out provider packages
- Primary Medical Record Retrieval and Abstraction begins

Apr

- Primary Medical Record Retrieval and Abstraction ends
- Secondary Medical Record Retrieval begins

May

- Secondary Medical Record Retrieval ends
- May 2, 2025 – All retrieval and review stops for Medical Record Review Audit (MRRV)

June

- Final rates locked and reported to NCQA and DHCS
- June 13, 2025 – KDJ will de-activate credentials from Provider EMR

Sept

- HEDIS MY2024/RV2025 Annual Summary of Performance shared with our Provider Network





Contact Information

Partnership HEDIS Team Contact:

- Phone: (866) 828-2302
- Fax: (707) 863-4314
- Email: HEDISMRA@partnershiphp.org

KDJ Provider Support Line:

- Phone: (817) 329-1397

Questions

