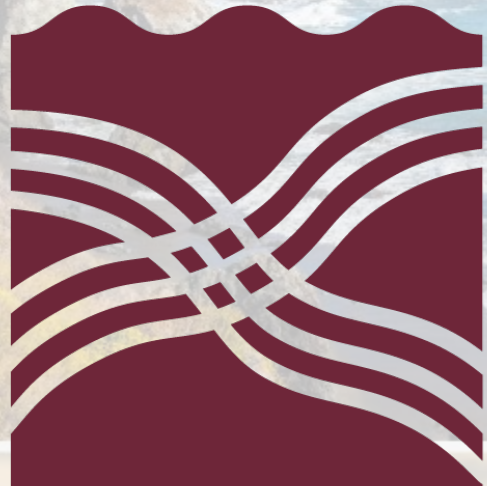


PARTNERSHIP



HEALTHPLAN

of CALIFORNIA

A Public Agency



HEDIS Measurement Year 2024 Reporting Year 2025 Medical Record Retrieval Webinar

Partnership HEDIS Team
December 11, 2024



Welcome

Thank you all for joining our Webex meeting!

You have been muted upon entry. If you have questions, please utilize the chat box within your Webex screen.

This meeting will begin promptly.



Welcome

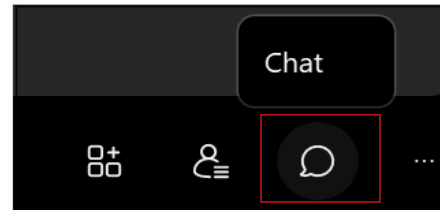
How to mute yourself

To mute or unmute yourself, select **Mute**  or **Unmute** .

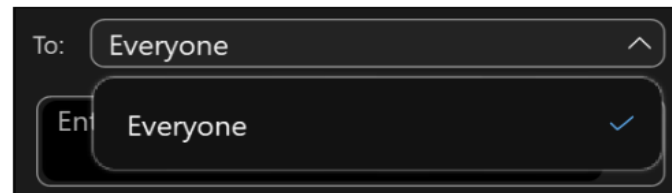
How to utilize chat feature

To send a chat message:

- 1 Open the Chat panel from the link in the lower right of the meeting window:



- 2 In the **To** drop-down list, select the recipient of the message.

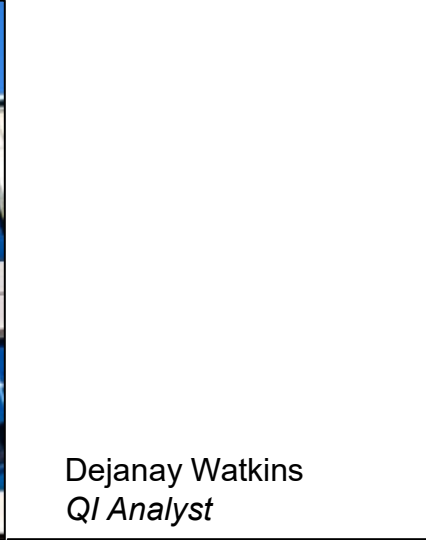


- 3 Enter your message in the chat text box, then press **Enter** on your keyboard.

HEDIS Team



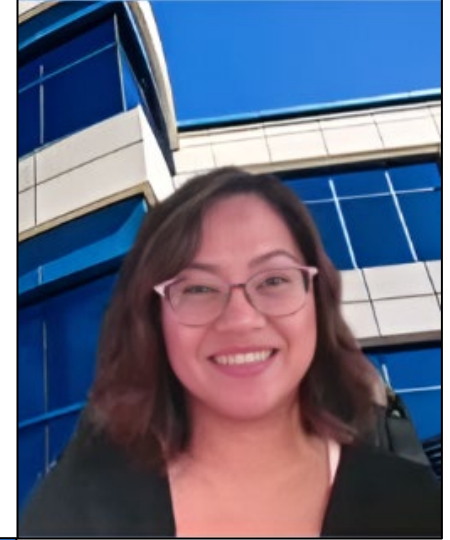
Sue Quichocho
*Manager of Quality
Measurement*



Dejanay Watkins
QI Analyst



Lola Powell
Senior QI Analyst



Jordan Sumodobila,
Pharm D.
Clinical Lead



Martha Layne, RN
*Supervisor of HEDIS
Clinical*



HEDIS Team

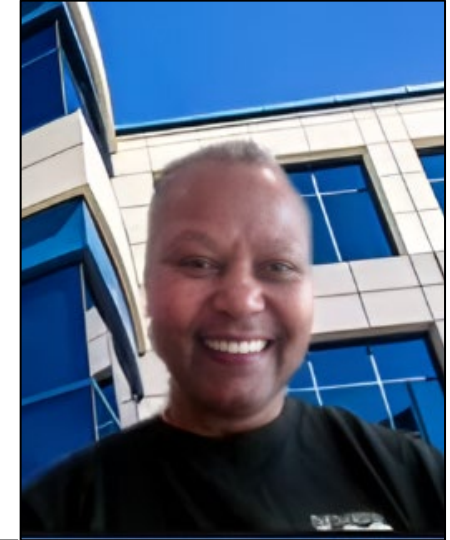


Megan Shelton
Senior Program Manager

Cheyenne Gains
Program Coordinator II



Michael Langley
Program Manager I



Cassandra Chambers
Program Manager I



Tegan Spencer
QI Analyst



Agenda

- Overview of HEDIS and medical record review
- Medical record retrieval options
- Partnership retrieval
- KDJ EMR remote retrieval
- Roles and responsibilities
- HEDIS timeline
- Resources and contacts

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.

Reporting Populations

DHCS and HPA Reporting Population

Partnership Counties

Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Marin, Mendocino, Modoc, Napa, Nevada, Placer, Plumas, Shasta, Sierra, Siskiyou, Solano, Sonoma, Sutter, Tehama, Trinity, Yolo, and Yuba counties.

All 24 counties – reported rates



Measurement Year versus 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.

Hybrid versus Administrative Measures

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 Measures

BPD**

- Blood Pressure Control (<140/90) for Patients with Diabetes

CBP

- Controlling High Blood Pressure

CCS

- Cervical Cancer Screening

CIS

- Childhood Immunization Status – Combo 10

EED**

- Eye Exams for Patients with Diabetes

IMA

- Immunizations for Adolescents – Combo 2

GSD

- Glycemic Status Assessment for Patients with Diabetes

LSC*

- Lead Screening in Children

PPC Pre & Post

- Timeliness of Prenatal Care
- Postpartum Care

WCC**

- BMI Percentile

**Indicates HPA reporting only

* Indicates MCAS reporting only




Medical Record Retrieval



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		

Types of Retrieval

- Remote Collection
 - Records collected electronically from Provider EMR (Electronic Medical Record)
 - KDJ Consultants
- Partnership 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.

Partnership Retrieval

Outreach and Scheduling Provider Method:

1. Partnership staff will outreach to identify appropriate retrieval method and establish a commitment date in February.

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

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

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

Partnership Retrieval

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

ShareFile

- 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](#)

ShareFile Example

Megan Shelton has shared the folder 'HEDIS RY23MY22' with you. - Message (HTML)

File Message Acrobat Tell me what you want to do...

Ignore Delete Reply Reply Forward IM More... Create a task with... New Meeting New Message Create New

From: mail@sf-notifications.com
Subject: Megan Shelton has shared the folder 'HEDIS RY23MY22' with you.
To: Tegan Spencer

If there are problems with how this message is displayed, click here to view it in a web browser.

Megan Shelton has shared the folder **HEDIS RY23MY22** with you.

Note From Megan:

I've added you to a folder

> [Click here to view this folder](#)

ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail.

Trouble with the above link? You can copy and paste the following URL into your web browser:
<https://partnershipphp.sharefile.com/f/foa3649f-4a43-4f9d-97e7-46873d8a1c96>

Powered by Citrix ShareFile 2023

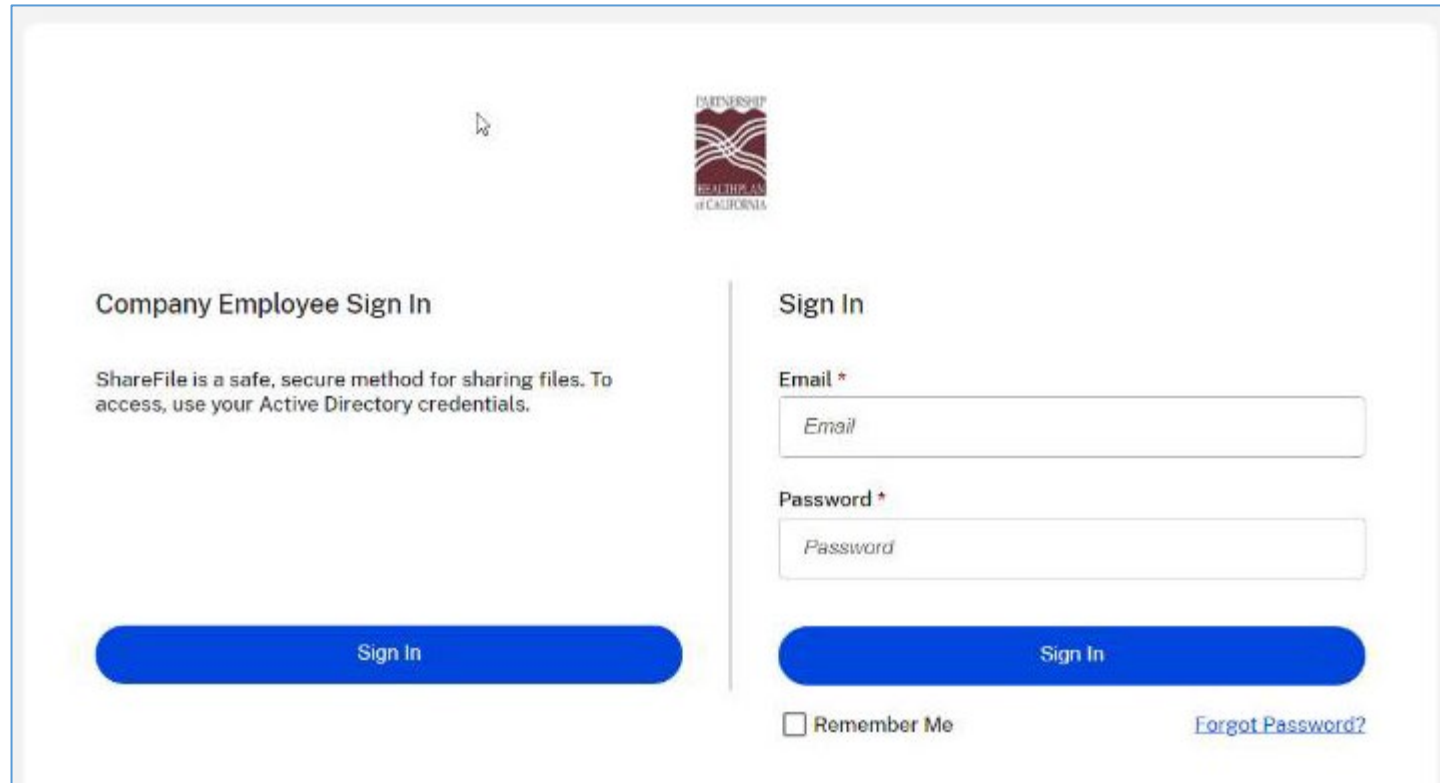
Desktop 7/11/2023 2:35 PM

Click here to activate your account and view this folder

- 1) Email will come from mail@sf-notifications.com
- 2) Subject line will say (Partnership staff name will appear here) has shared the folder (your clinic name here) with you.
- 3) In the body of the email, it will repeat what is in the subject line
- 4) Select "Click here to view this folder" or use the link provided farther down.
- 5) Select "Click here to view this folder" or use the link provided farther down.

ShareFile Example

- Clicking the link will open a web browser and take you to a login screen.
- If it is your first time using ShareFile, click Forgot Password to establish your login details



The image shows a web browser window displaying the ShareFile login interface. At the top center is the Partnership Healthplan of California logo. Below the logo, the page is divided into two main sections. The left section is titled "Company Employee Sign In" and contains the text: "ShareFile is a safe, secure method for sharing files. To access, use your Active Directory credentials." Below this text is a large blue button labeled "Sign In". The right section is titled "Sign In" and contains two input fields: "Email *" and "Password *". Each field has a placeholder text "Email" and "Password" respectively. Below the input fields is a large blue button labeled "Sign In". At the bottom of the right section, there is a checkbox labeled "Remember Me" and a link labeled "Forgot Password?".

ShareFile Example

- After logging in, you will see the folder created for your office and the Provider Package that contains the information on which charts we need to collect.

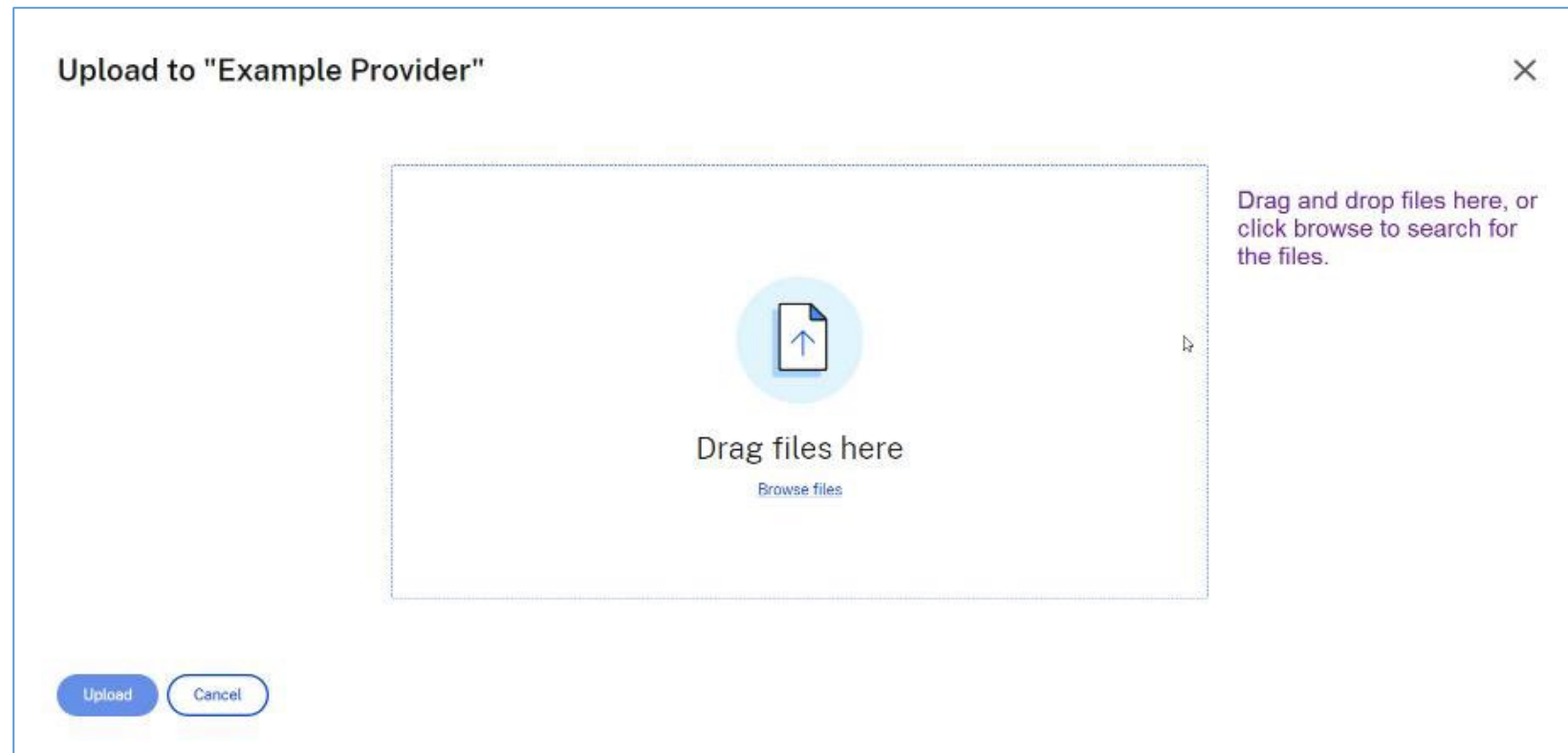
The screenshot displays the ShareFile web interface. On the left is a navigation sidebar with links to Dashboard, Folders, Personal Folders, Shared Folders, Favorites, File Box, Recycle Bin, Workflows, Inbox, People, and Settings. The main content area shows a breadcrumb trail: Shared Folders > MEDS HY23 MY22 > Megan's Providers > Example Provider. Below this is a folder icon and the name 'Example Provider' with a 'More Options' menu. There are tabs for 'Items' and 'People'. A table lists the contents of the folder:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Example Provider_Provider Package.pdf	2 MB	2:23PM	T. Spencer	

Below the table, there is a notification option: 'Email me when a file is: ☐ Downloaded from this folder ☒ Uploaded to this folder'. A blue plus icon is visible in the top right of the main area. The bottom right corner features a blue circular icon with a white 'S'.

ShareFile Example

- Select Upload from the menu that appears and the screen will prompt you as follows



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

What to expect:

1. Partnership reaches out to providers for remote retrieval beginning in October/November



2. Partnership refers all providers who are signed up for remote retrieval to KDJ



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



4. KDJ begins HEDIS retrieval in mid February and sends out the provider package.

Roles and Responsibilities



HEDIS Team Responsibilities

Partnership's HEDIS team responsibilities include:

- Partnering 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.
- Intervene and provide support to resolve any challenges if 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.)
- Assigned nurse logs into EMR to review specified charts to collect HEDIS data.
- Copies only medical record data to support abstraction made accessible to Partnership.

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.
- Submit requested records to Partnership by the agreed upon date for provider method.
 - Note any members whose chart is not available.
- Inform Partnership of any delays or issues as they occur.

Timeline



HEDIS MY2024 Timeline

Dec

- December 27, 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/RY2025 Annual Summary of Performance shared with our provider network

Resources

Partnership HEDIS Website

- <http://www.partnershiphp.org/Providers/Quality/Pages/HEDISLandingPage.aspx>
- Medi-Cal HEDIS MY2023 Performance
- HEDIS FAQs
- Technical Guideline for Remote Access
- HEDIS Newsletter
- Upcoming Webinars and Trainings
- Measure definitions and documentation requirements

NCQA Website

- <http://www.ncqa.org/HEDISQualityMeasurement.aspx>



Contact Us

Partnership HEDIS Team

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

KDJ Provider Support Line:

- Phone: (817) 329-1397



Questions

