

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

WHO: This guide is intended for eReports users who participate in Partnership's Primary Care Provider Quality Incentive Program (PCP QIP).

WHAT: Preventive care reports provide detailed data for the following PCP QIP measures: child and adolescent well-care, well-child visits in the first 15 months, well-child visits in the first 15-30 months, childhood immunization status, and immunizations for adolescents.

WHY: Preventive care reports display member contact information, existing immunizations, and dates of service for well-visits. These reports support efforts to perform member outreach and close care gaps. Partnership recommends accessing reports early in the year (prior to the launch of eReports) to help initiate measure quality improvement efforts.

Accessing the Preventive Care Dashboard:

1. Log into the Partnership eReports page [here](#).



2. Enter your username and password.
 - a. If you are a new user, email the PCP QIP team at qip@partnershiphp.org for your site's registration key.
 - b. If you forgot your password, select "Can't access your account?" on the login page. You will receive an email to reset your password.

QIP e-Reports

Sign in with your organizational account

Username is required

Password is required

Username

Password

Log In

Sign Up:

New user, email QIP Team at qip@partnershiphp.org for your site's registration Key. Click [here](#) to register with a registration Key.

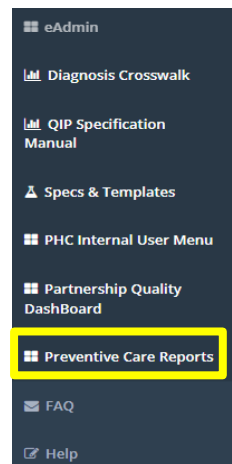
Can't access your account?

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

- From the eReports threshold report screen, select “Preventive Care Reports” from the option menu on the left-hand side.


This will take you to the Preventive Care Report Summary Information dashboard which includes:

- Overview of reports
- Recommended use of reports
- Important notes
- FAQs



Five Report Options:

- Childhood Immunization Status – Combo 10 Dashboard
- Immunizations for Adolescents Dashboard
- Well-Child Visits 0 – 15 Months Dashboard
- Well-Child Visits 15 – 30 Months Dashboard
- Annual Well-Care Visit Dashboard

Summary Information	CIS: 0-2 Yrs	IMA: 9-13 Yrs	6+Visits by 15Months	2+Visits by 30Months	Annual Well Care Visits
					
<h3>Preventive Care Reports</h3> <p>These reports are supplemental to eReports and do not indicate measure compliance. The source of data is Partnership's administrative data only. Dates of service that have been uploaded into e-Reports are not visible in these reports.</p> <p><u>Immunization Dose Reports</u> The intent of the immunization dose reports is to enhance visibility of immunizations given, including for members not yet in the annual denominators for the Childhood Immunization Status and Immunizations for Adolescents measures. Data sources for this report include California Immunization Registry (CAIR) data, Partnership's claims and encounter data, and immunization data received through Partnership's Clinical Data Repository.</p> <p><u>Well Care Reports</u> Like the Immunization Reports, Well Care reports promote visibility of well visits completed for members who are not yet in the denominator for the Well Child Visits in the First 15 Months, Well Child Visits in the First 15 – 30 Months and the Child and Adolescent Well Care measures. The data source for these reports is Partnership's claims and encounter data. Note that dates of service must be a minimum of 14 days apart to count towards numerator compliance.</p> <p><u>Recommended Use</u></p> <ul style="list-style-type: none"> - Use reports to engage with members sooner, to help keep members on track with recommended immunization schedules and well-care visits. - Review service dates against measure requirements, to determine if members still require additional dates of service before aging out of the measure. - If immunization dates of service are not captured on this report, please report them in CAIR. This will help to ensure data is administratively captured in e-Reports. <p><u>Important Notes</u></p> <ul style="list-style-type: none"> - Reports may not include recent dates of service due to claims lag (up to 3 months) and the timeframe by which Partnership integrates CAIR data (typically a 4 to 6 week lag). - Duplicate immunization dates, or dates of service close in time may be represented as separate immunizations on the report, depending on how records were entered in CAIR or services were billed. Confirm all service dates in e-Reports and against measure specifications to ensure compliance. - No upload data from e-Reports is captured in this dashboard 			<h3>Frequently Asked Questions</h3> <p>Q. Members with letter "E" in their Client ID Number (CIN) show up with scientific notation formatting when I download the report. A. This is due to Excel's auto-formatting. To fix this, open a new workbook and import the downloaded immunization report as a text file.</p> <ul style="list-style-type: none"> - Select the Data tab from the ribbon - Select 'From Text' under Get External Data menu - Locate your report from the folder it was downloaded to. Click Import. - Use the Import Wizard to import the file <ul style="list-style-type: none"> - Step 1. Delimited data type (Next) - Step 2. Tab delimited check (Next) - Step 3. Highlight the column for CIN and change the column data format to Text (Finish, OK) <p>Q. Why are there more or less columns in the report for each vaccine-type than number of doses required for the series? A. The number of immunization columns reflects the maximum number of dates of service for any given member in the report. If none of the members had any doses under a vaccine-type, there will be no placeholder columns for that vaccine. If a single member had many different dose dates under a series, that number of columns will display under the series. To confirm the number of required doses in a series refer to the QIP measure specifications document for Childhood Immunization Status and Immunizations for Adolescents measures.</p> <p>Q. The columns showing dates of service are not in a standard date format when I export the dose report. A. To fix this, highlight all columns in the exported report that should show dates of service. On the Excel ribbon, change the format from General to Short Date.</p> <p>Q. What does "NULL" mean in the report(s)? A. NULL means there is no data available to report for that metric.</p>		

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

Childhood Immunization Status – Combo 10 (CIS-10):

This dashboard displays a vaccine dose report of immunization data for members in the CIS-10 denominator for the current measurement year and for members not yet in the annual denominator. Data sources for this measure include:

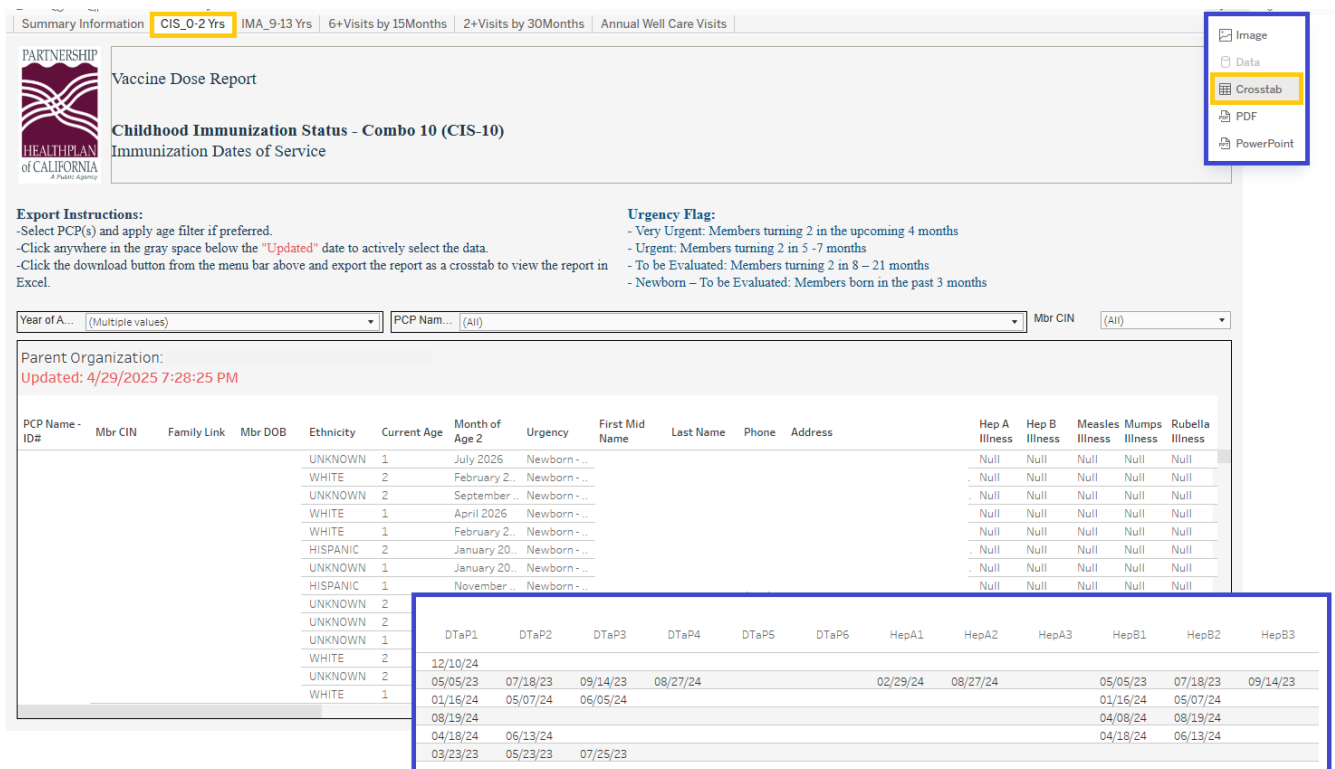
- California Immunization Registry (CAIR)
- Partnership claims and encounter data
- Data received through the Partnership Clinical Data Repository

Select the measurement year and PCP site you are interested in viewing data for and download to an Excel spreadsheet. Then, select “Crosstab” from the drop-down option in the top right-hand corner of the dashboard. Once the file has downloaded, you can filter the data however you want.

Data from this dashboard can be used to identify members flagged with the following identifiers:

1. Very Urgent (members turning two in the upcoming four months)
2. Urgent (members turning two in five to seven months)
3. To Be Evaluated (members turning two in eight to 21 months)
4. Newborn – To Be Evaluated (members born in the past three months)

Once the members of focus are identified, you can use the data for outreach to close gaps in care.



Export Instructions:

- Select PCP(s) and apply age filter if preferred.
- Click anywhere in the gray space below the "Updated" date to actively select the data.
- Click the download button from the menu bar above and export the report as a crosstab to view the report in Excel.

Urgency Flag:

- Very Urgent: Members turning 2 in the upcoming 4 months
- Urgent: Members turning 2 in 5 - 7 months
- To Be Evaluated: Members turning 2 in 8 – 21 months
- Newborn – To Be Evaluated: Members born in the past 3 months

Year of A... (Multiple values) | PCP Name... (All) | Mbr CIN (All)

Parent Organization:
Updated: 4/29/2025 7:28:25 PM

PCP Name - ID#	Mbr CIN	Family Link	Mbr DOB	Ethnicity	Current Age	Month of Age 2	Urgency	First Mid Name	Last Name	Phone	Address	Hep A Illness	Hep B Illness	Measles Illness	Mumps Illness	Rubella Illness
				UNKNOWN	1	July 2026	Newborn - ...					Null	Null	Null	Null	Null
				WHITE	2	February 2...	Newborn - ...					Null	Null	Null	Null	Null
				UNKNOWN	2	September ...	Newborn - ...					Null	Null	Null	Null	Null
				WHITE	1	April 2026	Newborn - ...					Null	Null	Null	Null	Null
				WHITE	1	February 2...	Newborn - ...					Null	Null	Null	Null	Null
				HISPANIC	2	January 20...	Newborn - ...					Null	Null	Null	Null	Null
				UNKNOWN	1	January 20...	Newborn - ...					Null	Null	Null	Null	Null
				HISPANIC	1	November ...	Newborn - ...					Null	Null	Null	Null	Null
				UNKNOWN	2											
				UNKNOWN	2											
				UNKNOWN	1											
				WHITE	2											
				UNKNOWN	2											
				WHITE	1											
				UNKNOWN	2											
				WHITE	1											

DTaP1	DTaP2	DTaP3	DTaP4	DTaP5	DTaP6	HepA1	HepA2	HepA3	HepB1	HepB2	HepB3
12/10/24											
05/05/23	07/18/23	09/14/23	08/27/24			02/29/24	08/27/24		05/05/23	07/18/23	09/14/23
01/16/24	05/07/24	06/05/24							01/16/24	05/07/24	
08/19/24									04/08/24	08/19/24	
04/18/24	06/13/24								04/18/24	06/13/24	
03/23/23	05/23/23	07/25/23									

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

Immunization for Adolescents (IMA):

This dashboard displays a vaccine dose report with immunization data for members in the IMA denominator for the current measurement year and for members not yet in the annual denominator. Data sources for this measure include:

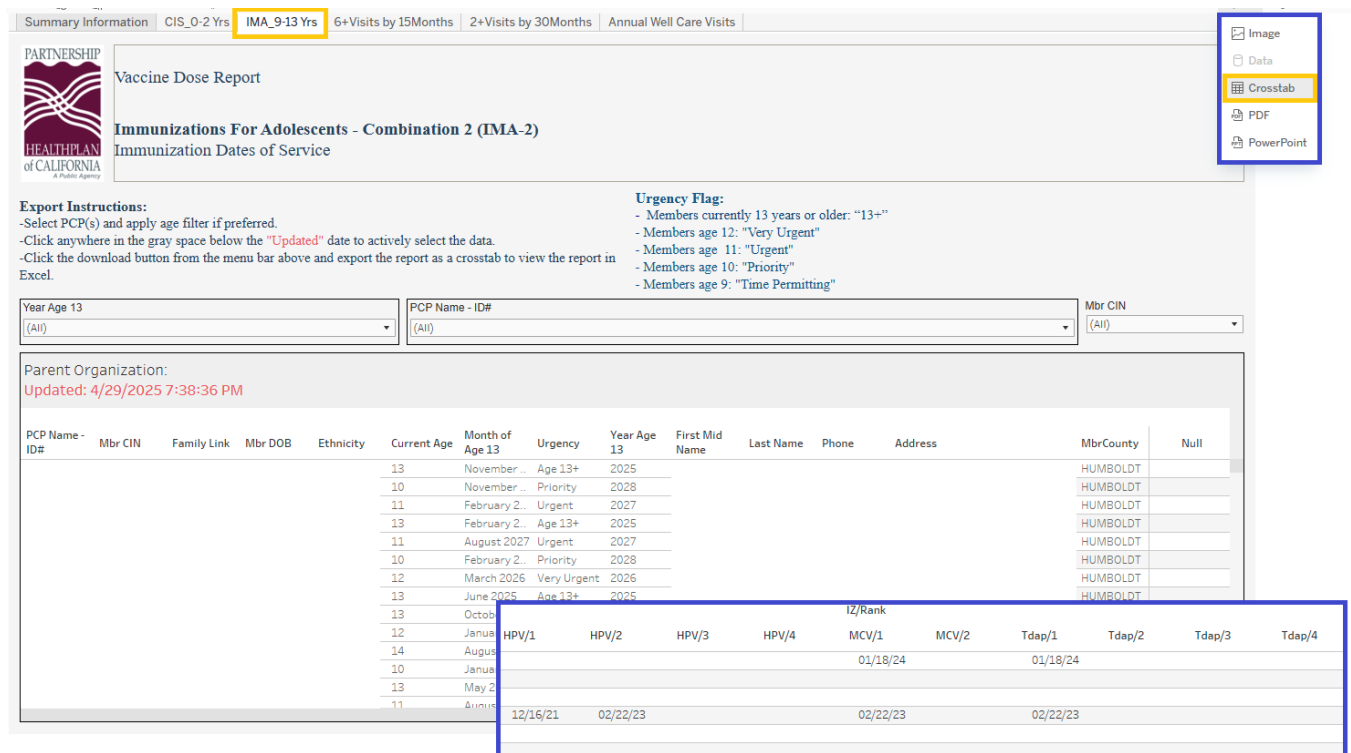
- CAIR
- Partnership claims and encounter data
- Data received through the Partnership Clinical Data Repository

Select the measurement year and PCP site you are interested in viewing data for and download to an Excel spreadsheet. Then, select “Crosstab” from the drop-down option in the top righthand corner of the dashboard. Once the file has downloaded, you can filter the data however you want.

Data from this dashboard can be used to identify members flagged with the following identifiers:

1. Very Urgent (members age 12)
2. Urgent (members age 11)
3. Priority (members age 10)
4. Time Permitting (members age 9)
5. Members currently 13 years or older (13+)

Once the members of focus are identified, you can use the data for outreach to close gaps in care.



Export Instructions:

- Select PCP(s) and apply age filter if preferred.
- Click anywhere in the gray space below the "Updated" date to actively select the data.
- Click the download button from the menu bar above and export the report as a crosstab to view the report in Excel.

Urgency Flag:

- Members currently 13 years or older: "13+"
- Members age 12: "Very Urgent"
- Members age 11: "Urgent"
- Members age 10: "Priority"
- Members age 9: "Time Permitting"

PCP Name - ID#	Mbr CIN	Family Link	Mbr DOB	Ethnicity	Current Age	Month of Age 13	Urgency	Year Age 13	First Mid Name	Last Name	Phone	Address	Mbr County	Null
					13	November ..	Age 13+	2025					HUMBOLDT	
					10	November ..	Priority	2028					HUMBOLDT	
					11	February 2..	Urgent	2027					HUMBOLDT	
					13	February 2..	Age 13+	2025					HUMBOLDT	
					11	August 2027	Urgent	2027					HUMBOLDT	
					10	February 2..	Priority	2028					HUMBOLDT	
					12	March 2026	Very Urgent	2026					HUMBOLDT	
					13	June 2025	Age 13+	2025					HUMBOLDT	
					13	October ..							HUMBOLDT	
					12	January ..							HUMBOLDT	
					14	August ..							HUMBOLDT	
					10	January ..							HUMBOLDT	
					13	May 2 ..							HUMBOLDT	
					11	August ..							HUMBOLDT	

IZ/Rank									
HPV/1	HPV/2	HPV/3	HPV/4	MCV/1	MCV/2	Tdap/1	Tdap/2	Tdap/3	Tdap/4
				01/18/24		01/18/24			
12/16/21	02/22/23			02/22/23		02/22/23			

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

Well-Child Visits:

This dashboard displays well-care reports of completed well-child visit data and provides visit visibility for members who are in the denominator for well-child visits in the first 15 months, well-child visits in the first 15-30 months, and child and adolescent well-care measures. The data sources for this measure include Partnership claims and encounter data. It is important to note this data **does not include** the following W15 and W30 measure criteria:

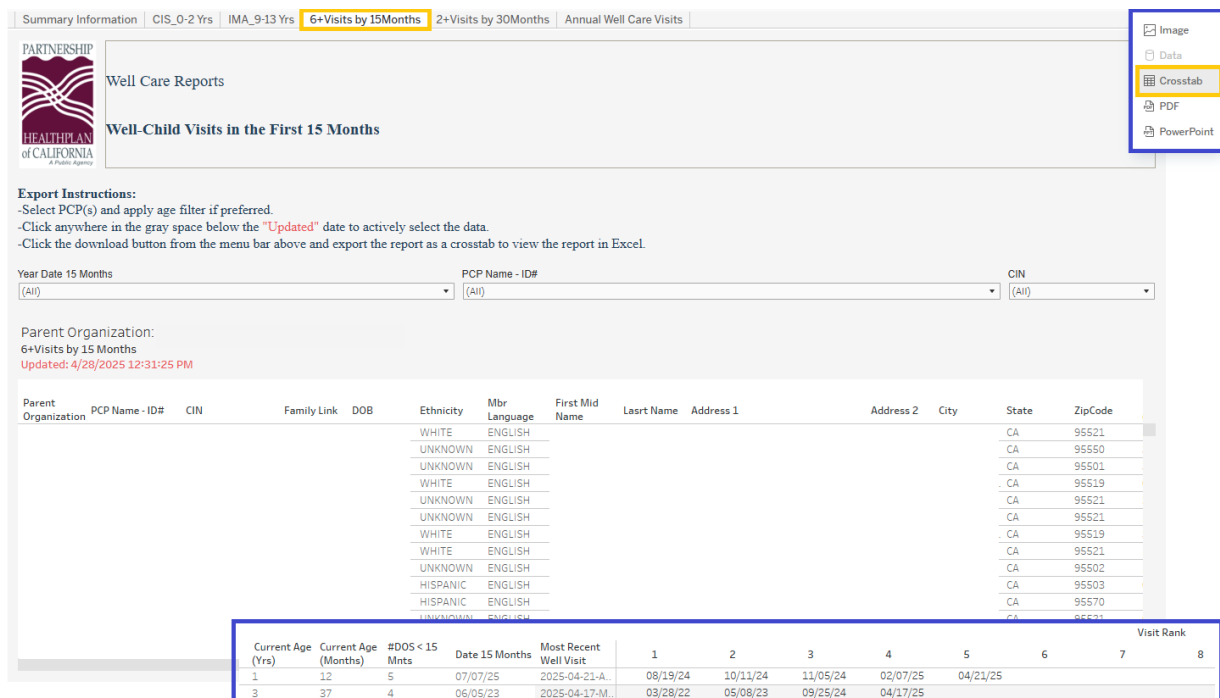
- The allowable gap continuous enrollment
- The children who had well-child visits billed under their mother's CIN
- The 14-day rule

Select the measurement year and PCP site you are interested in viewing data for and download to an Excel spreadsheet. Then, select "Crosstab" from the drop-down option in the top right-hand corner of the dashboard. Once the file has downloaded, you can filter the data however you want.

Data from this dashboard can be used to identify the following members:

1. Children turning 15 months who have identified well-child visits via Partnership claims or encounter data. Children with less than six visits can be targeted for outreach for the W15 measure.
2. Children aged 3-17 years who have identified well-child visits via Partnership claims or encounter data. Children with zero well-child visits between the ages 3-17 years can be targeted for outreach for the child and adolescent well-care visit measure.

Once the members of focus are identified, you can use the data for outreach to close gaps in care.



Well Care Reports

Well-Child Visits in the First 15 Months

Export Instructions:

- Select PCP(s) and apply age filter if preferred.
- Click anywhere in the gray space below the "Updated" date to actively select the data.
- Click the download button from the menu bar above and export the report as a crosstab to view the report in Excel.

Year Date 15 Months: (All) | PCP Name - ID#: (All) | CIN: (All)

Parent Organization: 6+Visits by 15 Months
Updated: 4/28/2025 12:31:25 PM

Parent Organization	PCP Name - ID#	CIN	Family Link	DOB	Ethnicity	Mbr Language	First Mid Name	Last Name	Address 1	Address 2	City	State	ZipCode
					WHITE	ENGLISH						CA	95521
					UNKNOWN	ENGLISH						CA	95550
					UNKNOWN	ENGLISH						CA	95501
					WHITE	ENGLISH						CA	95519
					UNKNOWN	ENGLISH						CA	95521
					UNKNOWN	ENGLISH						CA	95521
					WHITE	ENGLISH						CA	95519
					WHITE	ENGLISH						CA	95521
					UNKNOWN	ENGLISH						CA	95502
					HISPANIC	ENGLISH						CA	95503
					HISPANIC	ENGLISH						CA	95570
					UNKNOWN	ENGLISH						CA	95521

Current Age (Yrs)	Current Age (Months)	#DOS < 15 Mnts	Date 15 Months	Most Recent Well Visit	1	2	3	4	5	6	7	8	Visit Rank
1	12	5	07/07/25	2025-04-21-A.	08/19/24	10/11/24	11/05/24	02/07/25	04/21/25				
3	37	4	06/05/23	2025-04-17-M.	03/28/22	05/08/23	09/25/24	04/17/25					

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

Summary Information
CIS_0-2 Yrs
IMA_9-13 Yrs
6+Visits by 15Months
2+Visits by 30Months
Annual Well Care Visits

Well Care Reports

Well-Child Visits in the First 15 - 30 Months

Export Instructions:
 -Select PCP(s) and apply age filter if preferred.
 -Click anywhere in the gray space below the "Updated" date to actively select the data.
 -Click the download button from the menu bar above and export the report as a crosstab to view the report in Excel.

Year of Date 30 Months: (All) PCP Name - ID#: (All) CIN: (All)

Parent Organization:
 2+Visits by 30 Months
 Updated: 4/28/2025 12:31:25 PM

Parent Organization	PCP Name - ID#	CIN	Family Link	DOB	Ethnicity	Mbr Language	First Mid Name	Last Name	Address 1	Address 2	City	State	ZipCode
					WHITE	ENGLISH						CA	95521
					UNKNOWN	ENGLISH						CA	95550
					UNKNOWN	ENGLISH						CA	95501
					WHITE	ENGLISH						CA	95519
					UNKNOWN	ENGLISH						CA	95521
					UNKNOWN	ENGLISH						CA	95521
					WHITE	ENGLISH						CA	95519
					WHITE	ENGLISH						CA	95521

Current Age (Yrs)	Current Age (Months)	Year of Date 30 Months	#DOS 15-30 Mos	Date 15 Months	Date 30 Months	1	2	3	4	5
1	12	2026	0	07/07/25	10/05/26	08/19/24	10/11/24	11/05/24	02/07/25	04/21/25
3	37	2024	0	06/05/23	09/03/24	03/28/22	05/08/23	09/25/24	04/17/25	
3	39	2024	2	04/10/23	07/08/24	09/07/23	01/11/24	04/10/25		
0	6	2027	0	12/26/25	03/26/27	12/03/24	02/10/25	04/10/25		

Summary Information
CIS_0-2 Yrs
IMA_9-13 Yrs
6+Visits by 15Months
2+Visits by 30Months
Annual Well Care Visits

Well Care Reports

Child and Adolescent Well Care Visits

Export Instructions:
 -Select PCP(s) and apply age filter if preferred.
 -Click anywhere in the gray space below the "Updated" date to actively select the data.
 -Click the download button from the menu bar above and export the report as a crosstab to view the report in Excel.

Ages 3 - 17 in 2025: DOB 1/1/2008 - 12/31/2022

Year of DOB: (Multiple values) PCP Name - ID#: (All) CIN: (All)

Parent Organization:
 Annual WellCare Visit
 Updated: 4/28/2025 12:31:25 PM

Family Link	Mbr ID	DOB	Ethnicity	Mbr Lang..	First Mid N..	Last Name	Current Ag..	Mbr Phone	Address 1	Address 2	City	State	ZipCode	Compliance..	Most Recen..
			WHITE	ENGLISH			2				DAVIS	CA	95618	Y	2025-02-25
			BLACK	ENGLISH			3				DAVIS	CA	95616	N	Null
			UNKNOWN	ENGLISH			2				WOODLA..	CA	95695	N	2024-04-23
			HISPANIC	SPANISH			2				DAVIS	CA	95618	N	2024-10-31
			HISPANIC	SPANISH			3				WINTERS	CA	95694	N	2024-02-01
			UNKNOWN	ENGLISH			3				DAVIS	CA	95616	N	2024-10-30
			OTHER	ENGLISH			3				DAVIS	CA	95618	Y	2025-03-06
			HISPANIC	SPANISH			3				WEST SAC..	CA	95691	N	2024-05-16
			HISPANIC	SPANISH			2				DAVIS	CA	95616	Y	2025-01-14
			WHITE	ENGLISH			3				DAVIS	CA	95616	N	Null
			UNKNOWN	ENGLISH			2								
			HISPANIC	ENGLISH			2								
			HISPANIC	SPANISH			2								
			HISPANIC	ENGLISH			2								

Visit Rank									
1	2	3	4	5	6	7	8	9	
05/09/23	10/19/23	12/07/23	02/22/24	09/03/24	02/25/25				
09/29/22	11/17/22	01/17/23	03/14/23	05/02/23	06/13/23	11/07/23	02/06/24	04/23/24	
11/03/22	01/10/23	04/26/23	07/03/23	09/29/23	12/13/23	03/21/24	10/31/24		
02/10/22	03/29/22	06/03/22	09/22/22	10/28/22	03/23/23	05/25/23	08/03/23	02/01/24	

Quick Start Guide for Partnership Quality Dashboard: Preventive Care Reports

To view the PCP QIP detailed specifications manual, go to the eReports threshold report screen, and select “QIP Specification Manual” from the option menu on the left-hand side.

For best practices, please visit the On-Demand Accelerated Learning webinars listed below:

- [Pediatrics Health: Pediatric Care for 3-17 year olds](#)
- [Pediatrics Health: Pediatric Care for 0-2 year olds](#)

For questions, email QIP@partnershiphp.org.

