

TruChart™ HPMS and CMS Reporting

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Agenda

- Review available reports
- HPMS Reporting Overview
 - How to run
 - Tie-outs
- CMS Reporting overview
 - How to run
 - Tie-outs
- Resources

Available CMS Universe and HPMS Reports

CMS Universe reports:

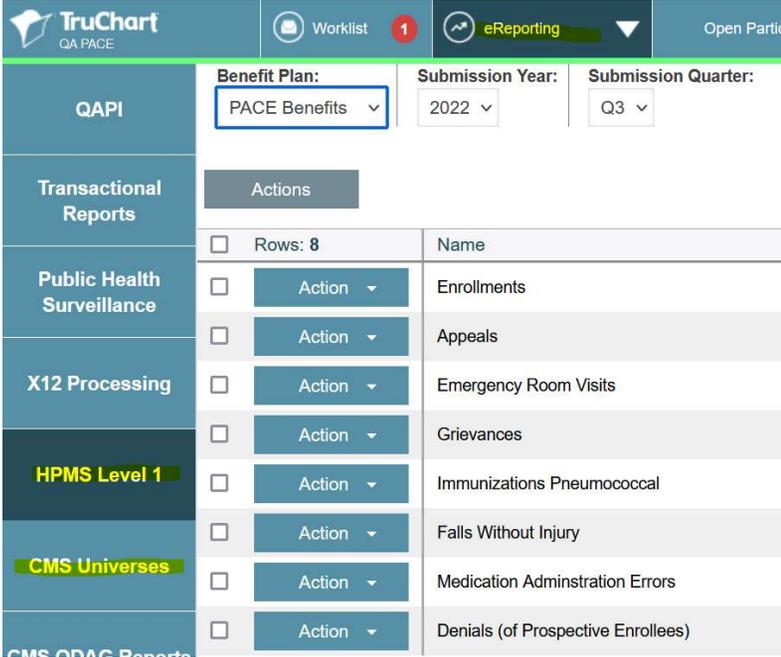
- Service Determination Requests
- Appeal requests
- Grievance requests
- List of Participant Medical Record (LOPMR)
- On-call Universe

HPMS level 1 reports:

- Enrollments
- Appeals
- Emergency Room Visits
- Grievances
- Pneumococcal Immunizations
- Falls without Injury
- Medication Administration errors
- Denials – of Prospective Enrollees

Accessing HMPS Level 1 and CMS Universe Reports

- eReporting Module – Permission-based
- Must be configured by your account analyst



The screenshot displays the TruChart eReporting interface. At the top, there is a navigation bar with the TruChart logo, a 'Worklist' button with a red notification badge, an 'eReporting' dropdown menu, and an 'Open Partic...' button. Below the navigation bar, there are three filter sections: 'Benefit Plan:' with a dropdown menu showing 'PACE Benefits', 'Submission Year:' with a dropdown menu showing '2022', and 'Submission Quarter:' with a dropdown menu showing 'Q3'. The main content area is divided into a left sidebar and a right table. The sidebar lists report categories: 'QAPI', 'Transactional Reports', 'Public Health Surveillance', 'X12 Processing', 'HMPS Level 1', 'CMS Universes', and 'CMS QDAG Reports'. The 'HMPS Level 1' and 'CMS Universes' categories are highlighted in yellow. The right table has a header row with a checkbox, 'Rows: 8', and 'Name'. Below the header, there are eight rows, each with a checkbox, an 'Action' dropdown menu, and a report name: 'Enrollments', 'Appeals', 'Emergency Room Visits', 'Grievances', 'Immunizations Pneumococcal', 'Falls Without Injury', 'Medication Administration Errors', and 'Denials (of Prospective Enrollees)'.

HPMS Level 1 Reporting Overview

- Run by Submission Quarter to ensure that the correct drop-down option is selected

The screenshot shows the TruChart QA PACE interface. At the top, there are navigation tabs for 'Worklist' (with a red notification badge '1') and 'eReporting'. Below the navigation, there are three filter sections: 'Benefit Plan' with a dropdown menu set to 'PACE Benefits', 'Submission Year' with a dropdown menu set to '2022', and 'Submission Quarter' with a dropdown menu set to 'Q3'. A 'QAPI' button is visible on the left side of the filter area.

- Generate Data** – Generate data to re-run the report and pull in any new data since last run

The screenshot shows a table with a header row containing 'Rows: 8' and 'Name'. Below the header, there is an 'Action' dropdown menu that is open, displaying several options: 'Download HPMS TXT Data', 'Download HPMS TXT with Extended Data', 'Generate Data' (highlighted in yellow), 'Mark As Submitted', and 'Mark As Unsubmitted'. The table rows below are partially visible but mostly obscured by the dropdown menu.

- Review Data** – Review the summary of data in the table or click on the row to expand the view and see additional details

Extended Data Report: Enrollments - BenefitPlan: PACE Benefits, Submission Year: 2022, Submission Quarter: Q3

Census	New Enrollments Medicare	New Enrollments Dual Eligible	New Enrollments Medicaid	New Enrollments Private Pay	Disenrollments Medicare	Disenrollments Medicaid
22	0	1	0	0	0	0

HPMS Level 1 Reporting Overview cont.

- Download HPMS TXT vs. HPMS with Extended Data
 - **TXT Data** – Submittable Format
 - **TXT with Extended Data** - .csv Format, including items with missing data

<input type="checkbox"/>	Rows: 8	Name
<input type="checkbox"/>	Action ▾	Enrollments
<input type="checkbox"/>	Download HPMS TXT Data Download HPMS TXT with Extended Data Generate Data Mark As Submitted Mark As Unsubmitted	

- **Mark as Submitted** – You can no longer re-generate data
 - Select Action > Mark as Unsubmitted if a mistake was made and the data needs to be re-generated for the submission quarter

<input type="checkbox"/>	Rows: 8	Name	Summary	Status
<input type="checkbox"/>	Action ▾	Enrollments	Census: 22 New Enrollments: 1 Disenrollments: 0	Generated

Slide 6

AHO There was a duplicate of this that I deleted; please duplicate again if that was intentional.
Amy Haines, 2022-09-13T19:04:20.426

KBO 0 No, there should be no duplicates
Katarzyna Bednarska, 2022-09-14T17:20:39.183

HPMS Level 1 Reporting – Data Capture

Enrollments: Enrollment Module

- Count of Enrollments currently receiving care
- New Enrollments/Disenrollments – driven by sponsor contracts

Referrals	Benefit Plan: eReporting			
	<input checked="" type="radio"/> All (59) <input type="radio"/> Ready to Send (12) <input type="radio"/> Enrolled (35)	<input type="radio"/> Submitted (0)	<input type="radio"/> Submittal Response (0)	
Plan Enrollment Contracts	<input type="checkbox"/> Actions	<input type="button" value="New Plan Sponsor Contract"/>	<input type="button" value="Upload File"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/>
Sponsor Contracts	<input type="checkbox"/> Rows: 59	<input type="button" value="Contract State"/>	<input type="button" value="Sponsor"/>	<input type="button" value="Pending Pooled Inco"/>
Subcontracts	<input type="checkbox"/> Action	Terminated	Medicare	
	<input type="checkbox"/> Action	Enrolled	Medicare	

Appeals: QI Event Module

- Create and Process Appeals for HPMS
- A summary will show the number of Appeals started but not completed

<input type="checkbox"/>	<input type="button" value="Action"/>	Appeals	Resolved in Quarter: 0 Not Completed: 4
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HPMS level 1 Reporting – Data Capture

Grievances: QI Event Module

- Create and process Grievances for HPMS
- The summary will show the number of Grievances started but not completed

Emergency Room Visits: Emergent Visit or Review Forms

- Ensure that these are fully filled out, including discharge date to ensure data is captured

Discharge

Diagnosis:

Del	Primary	Code	Code Type	Description
Add ICD10 ...				

Create Transfer For:

Cancel Events:
Reason:
Admission

Disposition:
Admitted to healthcare facility ▼

Participant Outcomes:

Participant outcomes...

Change in Plan of Care

Discharged to a higher level of care

Discharged to Home

DME (medical equipment) provided

Expired

Hospital Admission

Slide 8

AHO This image is a little blurry. Suggest a clearer screenshot if possible.
Amy Haines, 2022-09-13T19:08:37.219

KBO 0 Clearer screenshot has been added.
Katarzyna Bednarska, 2022-09-14T17:25:00.633

HPMS Level 1 Reporting – Data Capture

Pneumococcal Immunizations: Administered immunizations

- Setup in eReporting > Setup > HPMS level 1 to set CVX code (s)
- Pulls current census and determines Administered, Not Administered – declined, or Missing
 - Expand row to see details – who is missing?

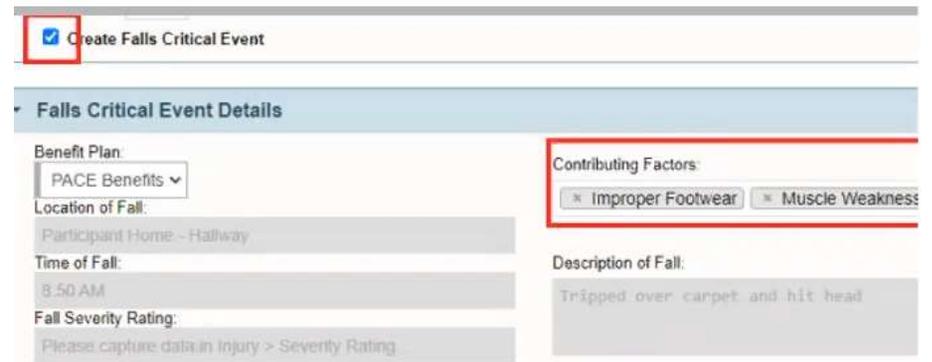
Administered: 1

Not Administered: 1

Missing: 46

Falls Without Injury: QI Events or Report of Fall Assessment Form

- In the Report of Fall Assessment Form, select “Create Falls Critical Event” to open additional questions – complete investigation in QI Events module



Create Falls Critical Event

Falls Critical Event Details

Benefit Plan: PACE Benefits

Location of Fall: Participant Home - Hallway

Time of Fall: 8:50 AM

Fall Severity Rating: Please capture data in Injury > Severity Rating

Contributing Factors: Improper Footwear Muscle Weakness

Description of Fall: Tripped over carpet and hit head

HPMS Level 1 Reporting – Data Capture

Medication Administration Errors: QI Events > Critical Events

- Create a Critical Event with the type of Medication Administration Error

Denials of Prospective Participants: Enrollment Module

- Pulls the date and reason for the “Not Enrolled” status

Move to Not Enrolled ✕

Not Enrolled Reason:
Level-of-Care Denial initiated by the SAA b

Not Enrolled Date: 2/17/2019 a

Generate Enrollment Letters:
 Not Enrolled Confirmation Letter

Save & Close Close

CMS Universes – Data Capture

Appeals

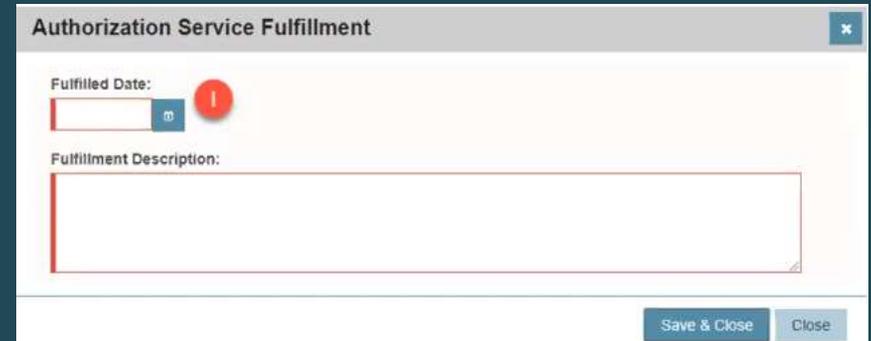
- QI Events > Appeals

Grievances

- QI Events > Grievances

Service Determination Requests (SDR)

- Utilization Management, Participants' Authorization Quickview, or Authorization Request Forms
 - If creating from Authorization Form, select “Service Determination Request” checkbox to open additional fields
 - Fulfill SDR



Authorization Service Fulfillment

Fulfilled Date: 

Fulfillment Description:

Save & Close Close

CMS Universes – Data Capture

On-call Universe

- Telephone Form

Universe	Reporting Requirements	TruChart Form/Module	Form Section	Field Name
On- Call	Caller Information	Telephone	Telephone Note	Relationship
On- Call	Date of Call	Telephone	Telephone Note	Call Time (date field)
On- Call	Time of Call	Telephone	Telephone Note	Call Time (time field)
On- Call	Call Description/ Reason For Call	Telephone	Telephone Note	Call Description/Reason for Call
On- Call	Response to Call	Telephone	Telephone Note	Plan Details

CMS Universes – Data Capture

List of participant medical records

- Many data capture areas
 - Enrollments, admissions, **problems**, and interventions

Problems: Condition types tips and tricks

- Setup Template Library
 - Frequently used Medical Problems
 - Care Management > Setup > Template Library
- Watch for CMS Condition Type helper codes
 - Codes built in the background to prompt addition of a CMS Condition type to the LIFEplan

Demo in TruChart – Template Libraries

TruChart QA/PACE | Worklist 9 | Care Management | Open Participant Record | admin

[Download LIFEplan Template File](#) |
 [Upload LIFEplan Template File](#) |
 [Load Participant LIFEplan File](#) |
 [Manage Problem Domains](#) |
 [Manage Barriers](#) |
 [History](#) |
 [Show Archived](#)

Name	ICD-9s	ICD-10s	Type	CMS Condition Type	CMS Intervention Type	Description	Discipline	Check By Default	Req Attn
▶ Congestive Heart Failure-		I50.9	Med Pblm	CHF Exacerbation			PCP		
▶ Conjunctivitis	372.30, 372.10, 372.00		Med Pblm						
▶ Constipation	564.00		Med Pblm						
▶ Coordination of Care			Need/Str						
▶ CVA with Hemiplegia (R/L)	438.21, 438.22, 438.20		Med Pblm						
▶ Dehydration	276.51, 276.0, 276.1		Med Pblm						
▶ Dementia - Alzheimer's Disease		G30.9	Med Pblm	Dementia			PCP		

New and Noteworthy

- **HPMS – update race and ethnicity options**

- CMS has published an update in fields needed for submission on enrollment files that we generate out of TC. This change is effective 1/1/2023. Race and Ethnicity will need to be pulled into the enrollment file export if that data is populated in TC

- **Marital Status Dropdown – add on**

- According to HPMS guidelines, need to add 1 option (Partner/Significant Other) to the Marital Status dropdown in Demographics

- **HPMS Grievance Report Regulatory Changes – Alternative Resolution – Resolved in v22.08.00**

- The HPMS grievance report will only populate the Alternative Resolution (column K) when Alternative Resolution is selected as the response in the Resolution column (column J)

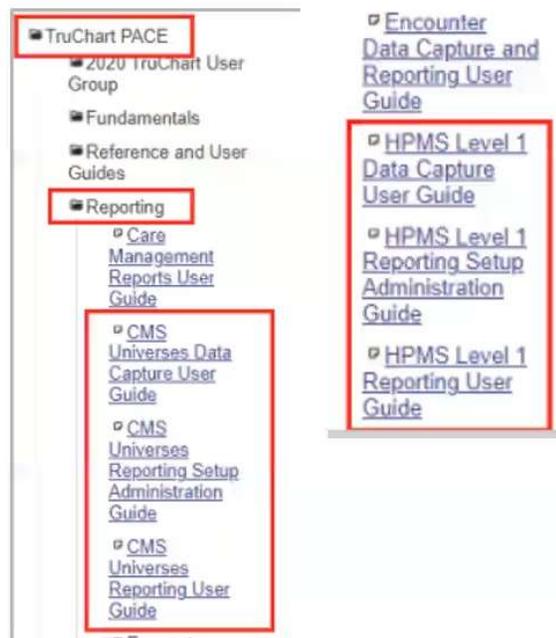
- **CMS 2023 Audit Protocol Changes - 1/1/2023**

- CMS has made changes to their CMS Audit Protocol effective 1/1/2023. Our product and development team are actively making the necessary changes within TruChart to be available in a future release

Resources

- TruChart Help Documentation
- Account Analyst:
 - Assistance with first-time account setups
 - Workflow assistance

TruChart Help Documentation:



Thank You

