

# TruChart™ HPMS and CMS Reporting

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*TruChart PACE National User Group*

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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:

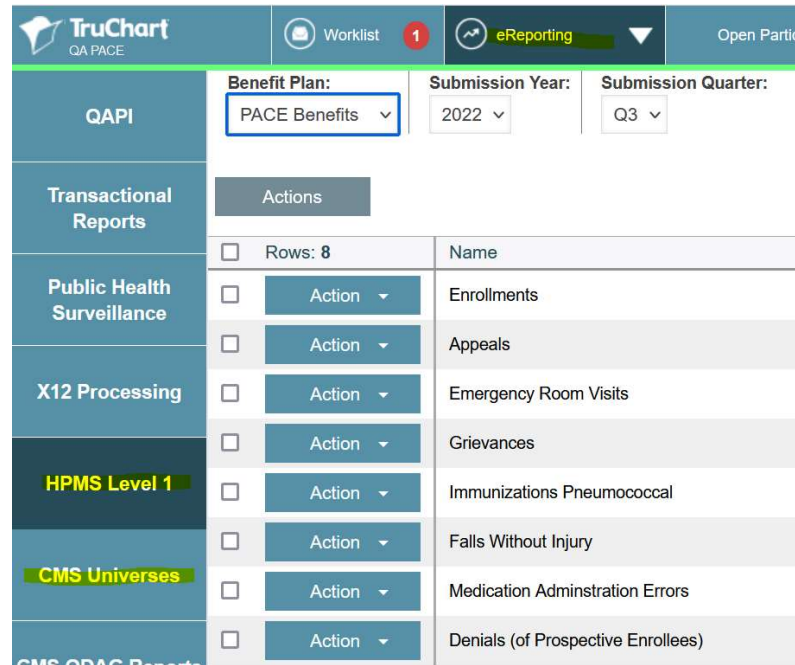
- Service Determination Requests
- Appeal requests
- Grievance requests
- List of Participant Medical Record (LOPMR)
- On-call Universe

## 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. The top navigation bar includes the TruChart logo, a Worklist icon with a red notification badge, an eReporting icon, and an Open Partials button. The left sidebar lists several report categories: QAPI, Transactional Reports, Public Health Surveillance, X12 Processing, HPMS Level 1 (highlighted in green), CMS Universes (highlighted in green), and CMS OPA Reports. The main content area features filters for Benefit Plan (set to PACE Benefits), Submission Year (2022), and Submission Quarter (Q3). Below the filters is an Actions button and a table with 8 rows. The table has a checkbox column, an Action column with dropdown menus, and a Name column. The rows are: Enrollments, Appeals, Emergency Room Visits, Grievances, Immunizations Pneumococcal, Falls Without Injury, Medication Administration Errors, and Denials (of Prospective Enrollees).

<input type="checkbox"/>	Rows: 8	Name
<input type="checkbox"/>	Action	Enrollments
<input type="checkbox"/>	Action	Appeals
<input type="checkbox"/>	Action	Emergency Room Visits
<input type="checkbox"/>	Action	Grievances
<input type="checkbox"/>	Action	Immunizations Pneumococcal
<input type="checkbox"/>	Action	Falls Without Injury
<input type="checkbox"/>	Action	Medication Administration Errors
<input type="checkbox"/>	Action	Denials (of Prospective Enrollees)

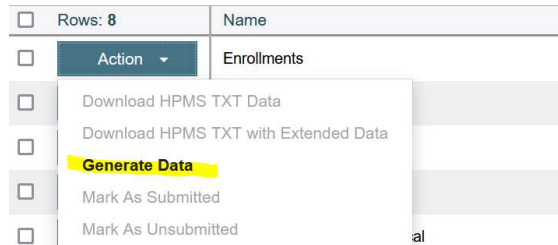
# HPMS Level 1 Reporting Overview

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



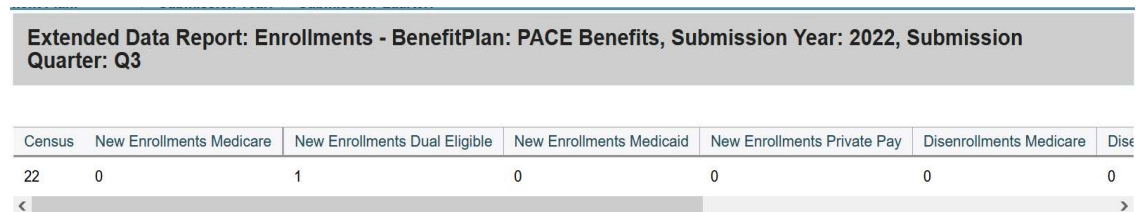
The interface shows the TruChart QA PACE header with navigation links for Worklist (1), eReporting, and Open Participant Record. Below the header, the QAPI section contains three filters: Benefit Plan (set to PACE Benefits), Submission Year (set to 2022), and Submission Quarter (set to Q3).

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



An action menu is open, showing options for the report. The options are: Download HPMS TXT Data, Download HPMS TXT with Extended Data, **Generate Data** (highlighted), Mark As Submitted, and Mark As Unsubmitted.

- 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
- **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
<input type="checkbox"/>	Action	Enrollments
<input type="checkbox"/>	Download HPMS TXT Data	
<input type="checkbox"/>	Download HPMS TXT with Extended Data	
<input type="checkbox"/>	Generate Data	
<input type="checkbox"/>	Mark As Submitted	
<input type="checkbox"/>	Mark As Unsubmitted	

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

## Slide 6

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**AH0** There was a duplicate of this that I deleted; please duplicate again if that was intentional.  
Amy Haines, 2022-09-13T19:04:20.426

**KB0 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)
Plan Enrollment Contracts		<input type="radio"/> Submitted (0)		<input type="radio"/> Submittal Response (0)
Sponsor Contracts	Actions	New Plan Sponsor Contract	Upload File	< 1 2 3
Subcontracts	<input type="checkbox"/> Rows: 59	Contract State	Sponsor	Pending Pooled Inco
	<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"/>	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...				

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

Create Transfer For:

☒

Cancel Events:

☐

Reason:

Admission

## Slide 8

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**AH0** This image is a little blurry. Suggest a clearer screenshot if possible.  
Amy Haines, 2022-09-13T19:08:37.219

**KB0 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?

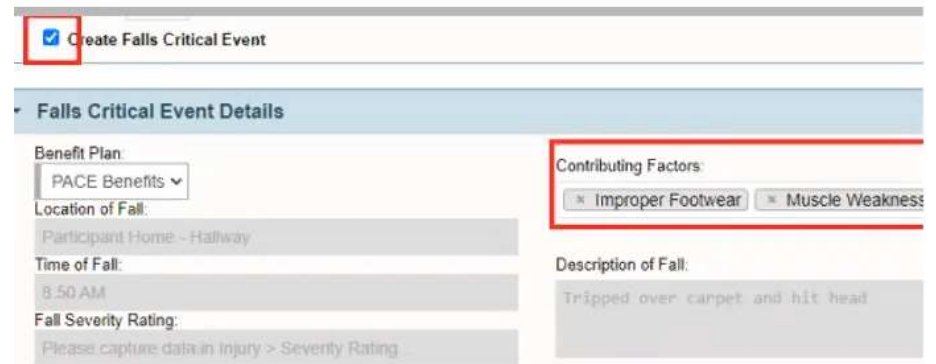
Administered: 1

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

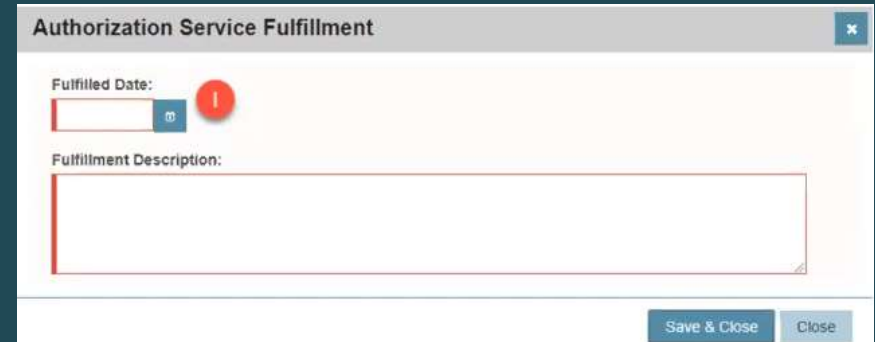
- QI Events > Appeals

## 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



# 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


Worklist 9
Care Management
Open Participant Record
admin

LIFEPlan
Template Library
Patient Education
Measure
Labs
Lab Preferences
Test

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)

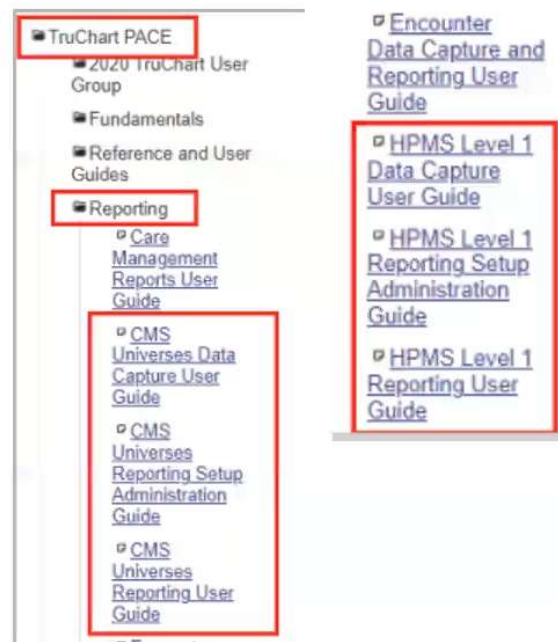
- **CMS 2023 Audit Protocol Changes - 1/1/2023**

- 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

