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# Introduction to Coreo®

*Live Kick-off Webinar – “Go”  
March 21<sup>st</sup>, 2018*



## Māhie 2020

ADVANCING THE HEALTH OF HAWAII

**NAVVIS**

Navvis Healthcare, Hawai'i division



An Independent Licensee of the Blue Cross and Blue Shield Association

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hmsa hmsa

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# Today's Presenter



**Alyssa Castillo**

Navvis Healthcare

Market Operations Solutions Lead

# Objectives

- Deep review of Coreo Payment Transformation navigation and functionality
- Clarity about where, what and how data is collected from outside resources
- Confidence in integrating Coreo into current and applicable workflows and research projects

# Agenda

- Coreo review
- Payment Transformation Functionality
  - Performance on quality measures
  - Monitoring and managing patient panel
  - Entering supplemental data
  - Submitting R4R
- Preparing for “Go Live”
- Q & A

# Coreo was designed for HMSA

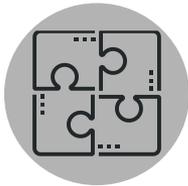
- *HMSA and Navvis customized Coreo for Hawaii physicians to allow them to be at the forefront of the management and coordination of care for their patients.*
- *Thank you for your support in making the transition to Coreo a smooth transition. We are looking forward to working with you!*

# Welcome to Coreo: What is Coreo?

- *Specialized tool to quickly and easily manage patient panels*
- *Integrates payment transformation, quality improvement goals, and overall support of the Māhie 2020 vision*
- *Allows providers to lead management and coordination of care for their patients*
- *Facilitates a comprehensive integrated approach to healthcare*

COREO

# Security



## Interface & Data feed Security

- BAA Agreements
- SFTP encryption in transit
- HL7 Protocol
- MLLP secure feeds
- Intrusion Detection System
- Intrusion Prevention System
- IP Source Verification
- Real Time file scanning



## Enterprise Data Warehouse Security

- Private cage environments inside enterprise grade datacenter facilities
- SOC2 Type I and II Certification for physical and environmental controls
- SQL Server Transparent Encryption
- Port Restrictions



## User Security

- Secure and encrypted connections (HTTPS)
- SIEM package with secondary alert software
- Next-Gen Check Point firewalls with intrusion prevention (IPS)
- Anti-malware, Anti-bot & content filtering
- Email DLP, Attachment Sandboxing, Anti-phishing

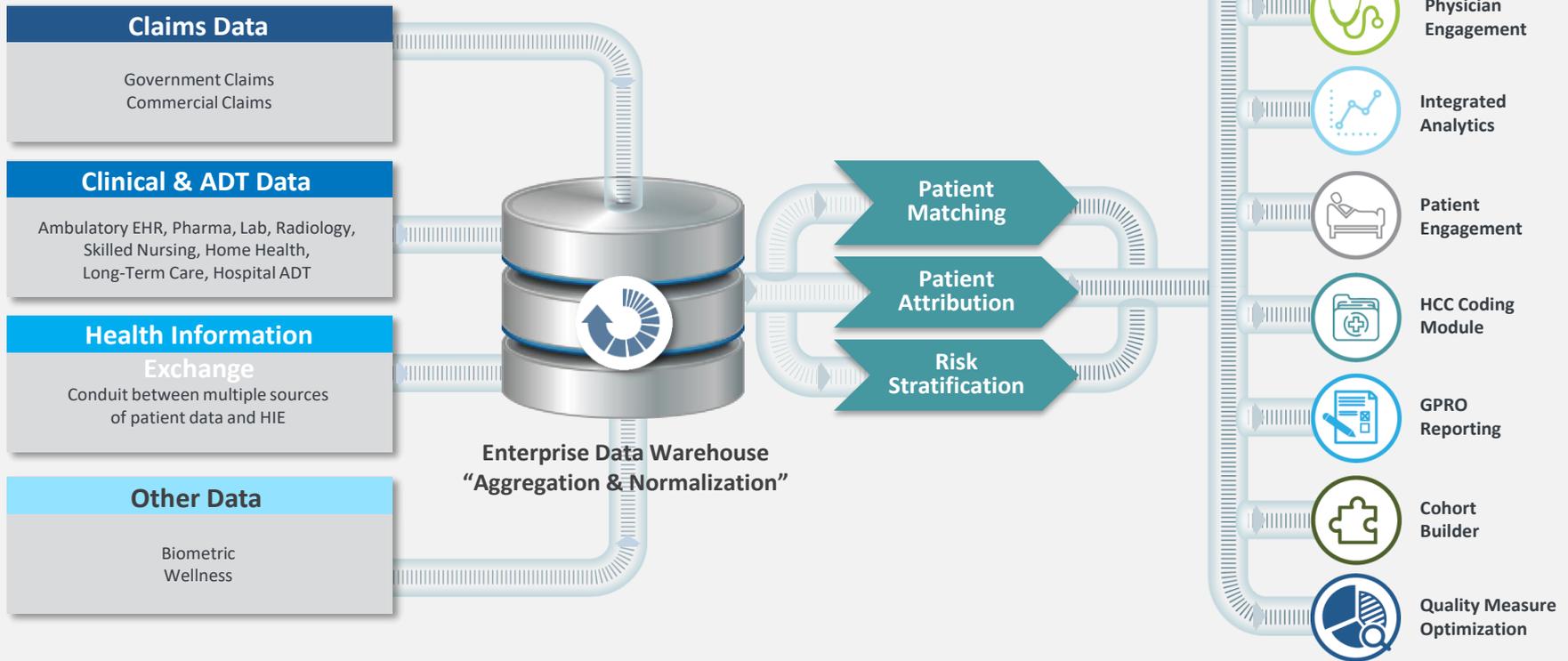


## Security Management

- 24x7 monitoring by security professionals
- Threat analytics
- Security Compliance Program
- Periodic HIPAA and FISMA risk assessments
- 4 part risk assessment to determine the extent and severity of potential breaches and notification plan



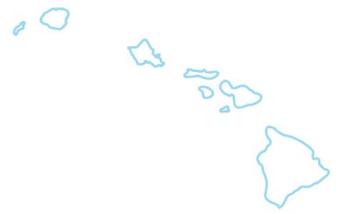
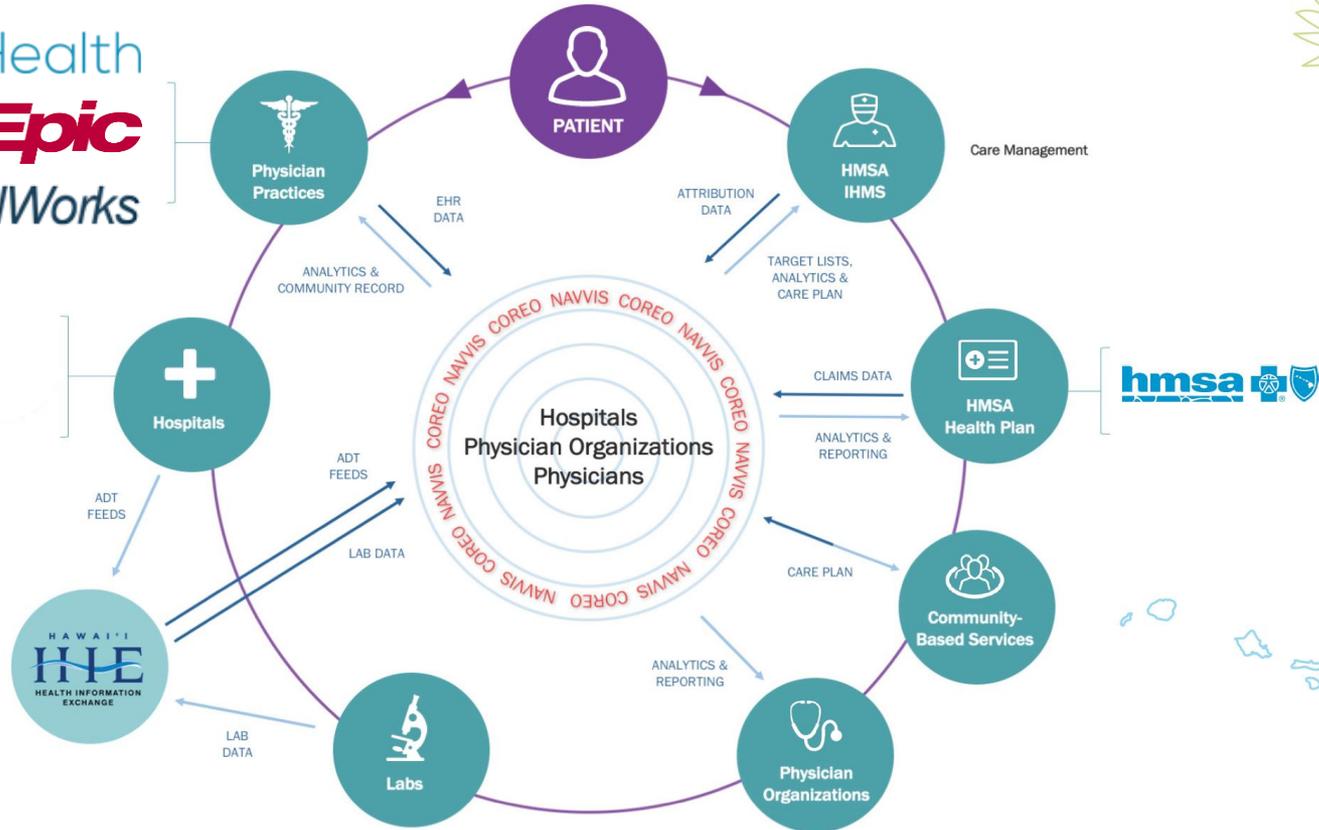
# Data Management



# HMSA/COREO CURRENT STATE ECOSYSTEM



ElationHealth  
Epic  
eClinicalWorks



# What does this mean for YOU?

- *Single data platform marrying clinical and claims data*
- *Longitudinal view of your patients across the entire continuum of care*
- *Empowers you to be at the forefront of the management and coordination of care for your patients*
- *Better understand patient populations and opportunities for improved care*
- *Optimize global monthly payments and annual performance payments*

# Coreo Hierarchy

Level	Name	Auto Group
1	Enterprise	<input type="checkbox"/>
2	Client	<input type="checkbox"/>
3	Physician Organization	<input type="checkbox"/>
4	County	<input type="checkbox"/>
5	Practice	<input type="checkbox"/>
6	Location	<input type="checkbox"/>

Showing all 7 rows

# Coreo User Roles

- **PO leader** – This role will have access, at the PO level, to the Analytical Charts and Dashboard areas to support the entire community within the given PO
- **Provider Support** – Group of super users to provide ongoing Coreo support to the Provider community
- **R4R Committee** – Group of authorized personnel to approve or decline R4R requests
- **Provider PTM** - Provider with access at his/her level, to the Analytical Charts, Dashboard area, Panel of Patients, Care Gaps, Patient Face Sheets, Assessments, and Notes, ability to move patients in and out of their panels.
- **Provider** – Non Payment Transformation provider with access at his/her level, to the Analytical Charts, Dashboard areas, Patient Charts, Care Gaps, Patient Face Sheets, Assessments, and Notes.
- **Support staff**– Support Staff will have access at the providers level, of whom they support. They will have access to some of the Analytical Charts, Dashboard areas, Patient Charts and Patient Face Sheets.

# Welcome to Coreo: General navigation

- Home-page View: Provider Summary
- Role-based access to data
- Menu bar defaults and module ribbon options
- Modules and sub-modules
- Filters, tool-tips, hyperlinks and buttons!

The screenshot displays the COREO dashboard interface. At the top, there's a header with the COREO logo and user information (Welcome Megan Calais). Below the header, there's a navigation menu with options like ADMIN, ANALYTICS, and DASHBOARD. The main content area is divided into several sections:

- Summary Cards:** Wellness Patients (609), Measure Compliance (0.01%), Cost vs Target (0.00%), and Resource Center (3).
- Open Care Opportunities:** A treemap chart showing various care opportunities such as Influenza Vaccine (Adult) with 454 instances, Tobacco Screening and Cessation Counseling with 346, and Controlling High Blood Pressure with 165.
- Cost by Claim Type:** A bar chart showing the average PPFM cost target for various claim types from November 2016 to November 2017.
- Patient Summary:** A table listing patient names, measure opportunities, average 12-month costs, average ATI, and average risk scores.
- Compliance:** A bar chart showing the numerator percentage for various compliance metrics like RCB, EDOL, CDC-EYE, etc.

# Performance Module

At the end of this section, users should understand the following:

- Variety and complexity of data available in the Performance displays
- Similarities between Coreo's and Cozeva's performance functionality
- Using advanced drill down and filter features to access comprehensive performance data
- How to display performance overview for all lines of business and detailed measure views to assess success

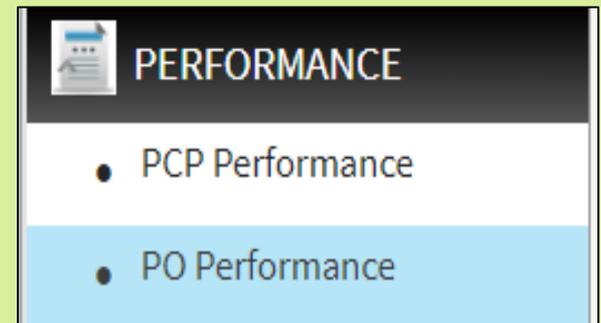
# Performance Module: Overview

## 1. PCP Performance

Monitor performance measures and address care gaps via the PCP Performance module.

**PCP users** will have access to all of their own financial and performance numbers. **Delegate users** may be granted permission by a physician to see financial data.

Supplemental and R4R entry resources and workflows are completed in this module.

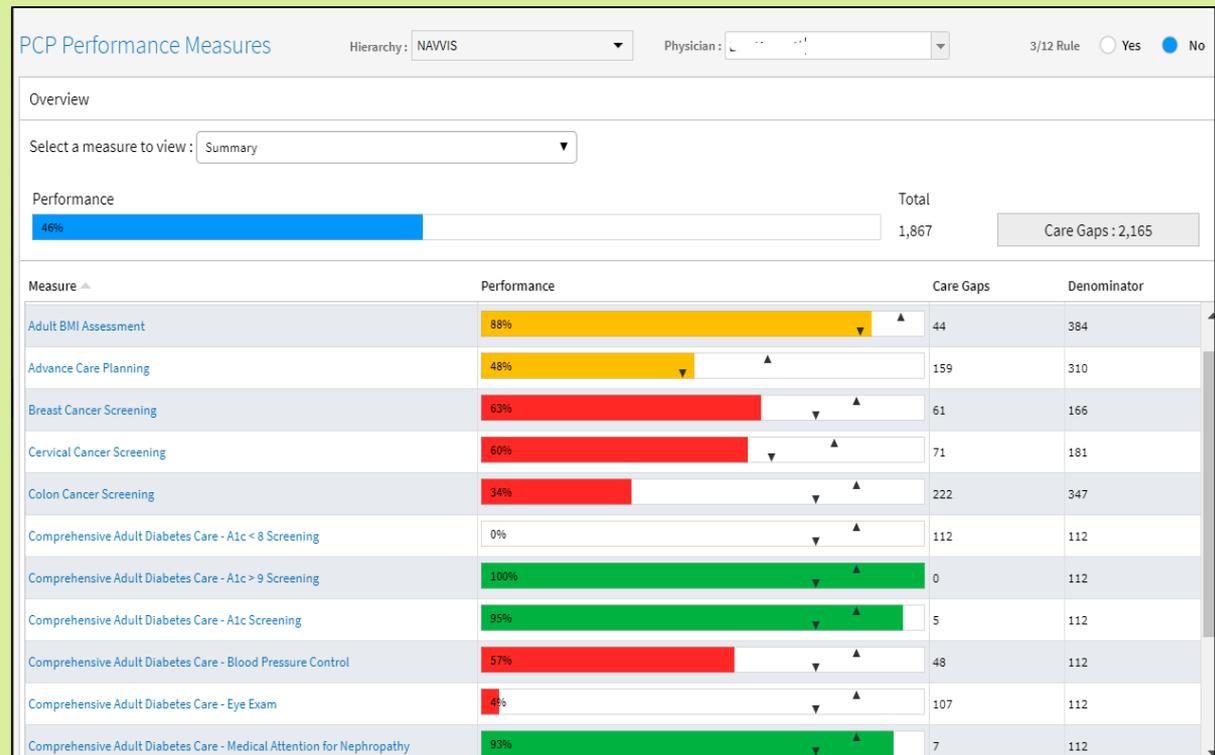


## 2. PO Performance

Physician Organization Administration users will have access to all of the PCPs in their organization. They have the ability to view and track participants' performance.

# PCP Performance - Overview

- 3/12 view indicator
- Summary and performance overview
- Measure hyperlinks
- Performance bars with benchmark points
- Care gaps monitoring
- Financial and analytic data overviews



# PCP Performance: Measure View

Drill down to an individual measure to see a list of the patients in the denominator for that measure

[Overview](#) > HMSA PTM Measure Program > Breast Cancer Screening

Select a measure to view:

Patient Name	DOB	Age	Last Screening Date	Breast Exam Code	Compliant Until	Contract Name	Compliance	Actions
Noakes, Pervinca	8/11/1945	72	6/29/2015	G0202	9/29/2017	Commercial HMO	No	
Zaragamba, Pansy	1/11/1963	54	8/14/2015	77057	11/14/2017	Commercial HMO	No	
Tunnelly, Jasmine	5/2/1963	54				Commercial PPO	Yes	
Oldbuck, Melba	11/8/1955	62				Commercial PPO	Yes	
Labingi, Malva	3/23/1962	55				Commercial HMO	Yes	
Lothran, Dora	8/15/1957	60	6/24/2014	G0202	9/24/2016	Commercial HMO	Yes	
Brownlock, Savan...	7/25/1961	56	12/22/2014	G0202	3/22/2017	Commercial HMO	Yes	

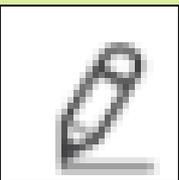
# PCP Performance: Measure action buttons

[Overview](#) > HMSA PTM Measure Program > Breast Cancer Screening

Select a measure to view:

**Care Gaps** Peer Comparison Provider Breakdown

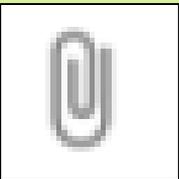
Patient Name	DOB	Age	Last Screening Date	Breast Exam Code	Compliant Until	Contract Name	Compliance	Actions
Noakes, Pervinca	8/11/1945	72	6/29/2015	G0202	9/29/2017	Commercial HMO	No	   
Zaragamba, Pansy	1/11/1963	54	8/14/2015	77057	11/14/2017	Commercial HMO	No	   
Tunnelly, Jasmine	5/2/1963	54				Commercial PPO	Yes	   



Add Task Note



Enter Supplemental Data



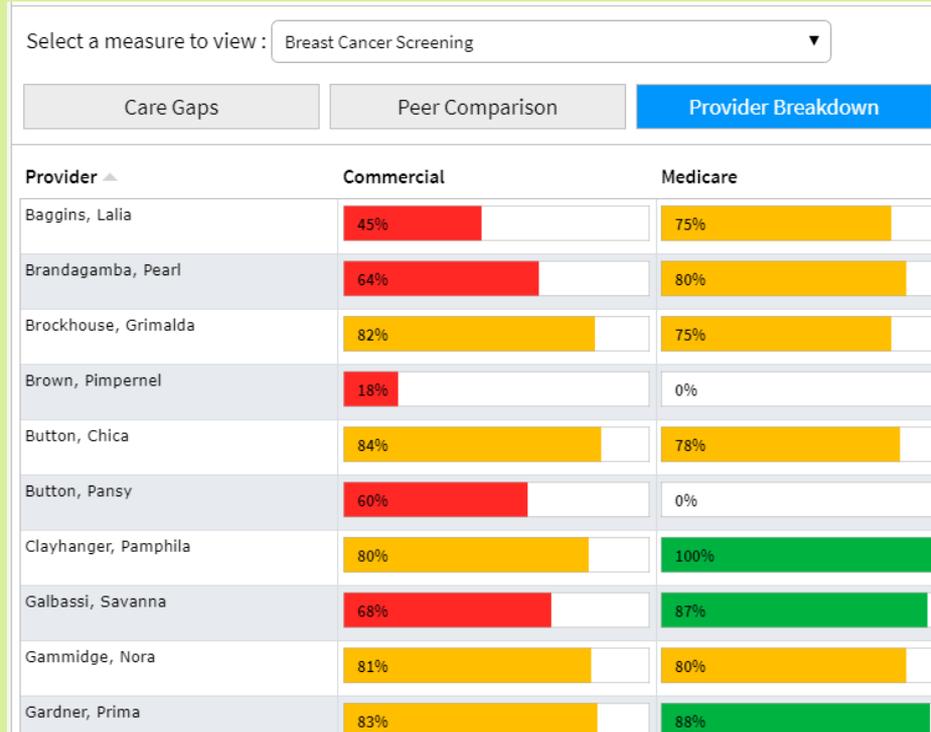
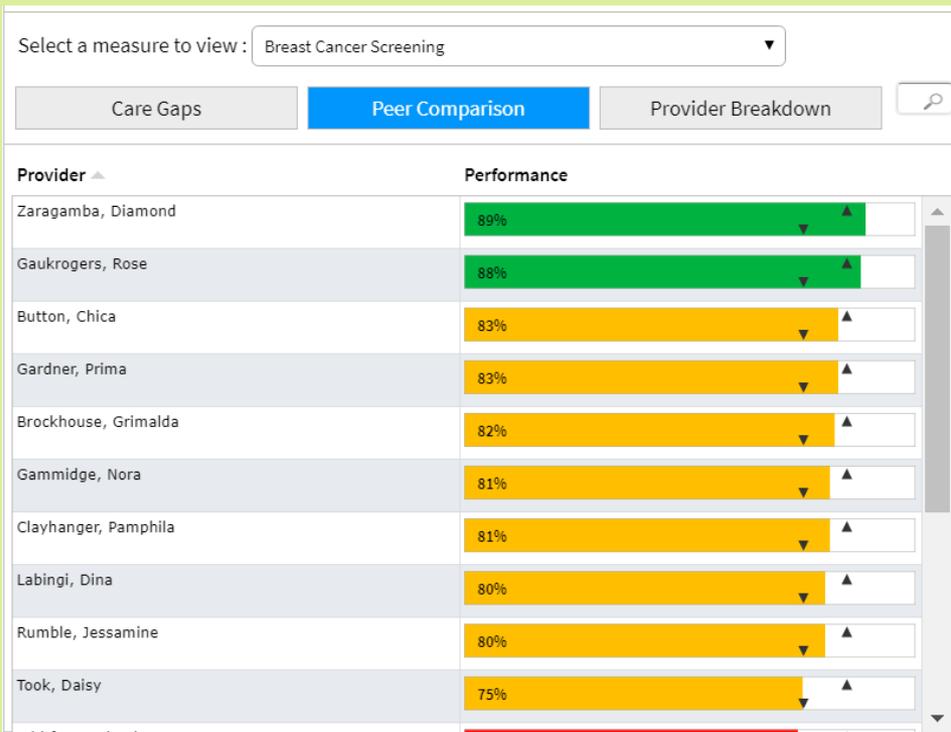
Add/View Attachment



Record R4R Data

# PCP Performance: Peer Comparison & Provider Breakdown

View measure performance for all the PCPs within your PO



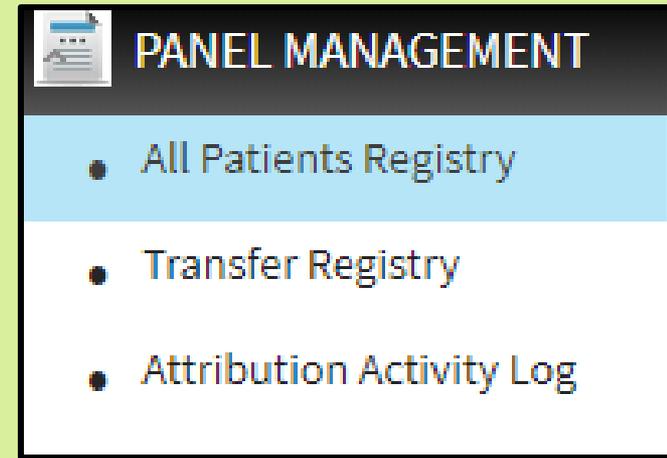
# Panel Management Module

At the end of this section, you should understand the following:

- Similarities between Coreo and Cozeva.
- Identifying patients on your current attribution panel.
- Where attributions initiate and why changes occur.
- Adding, removing and transferring members on your panel.
- How to monitor attribution activity associated with your practice.

# Panel Management Module: Overview

- Panel management consists of 3 sub-modules:
  - All patients registry
  - Transfer registry
  - Attribution activity log



# Panel Management: All Patients Registry

The All Patients Registry displays all actively attributed patients

All Patients Registry

Diamond Zaragamba × Add Provider

Patient Name	DOB	Gender	Member Id	Contract	Care Gals	Risk	ATI	Status	Provider	Last Visit
Baggins, Amanda	12/31/1955	Female	790170	Commercial HMO	4	4.937	8.58		Zaragamba, Diamo...	7/14/2017
Baggins, Bellisima	6/14/1976	Female	1139815	Commercial HMO	3	0.297	4.44		Zaragamba, Diamo...	1/25/2017
Baggins, Duenna	8/17/1957	Female	884118	Commercial HMO	5	0.611	4.38		Zaragamba, Diamo...	6/28/2017
Baggins, Elanor	3/15/1935	Female	826226	Commercial HMO	8	1.651	6.94		Zaragamba, Diamo...	7/28/2017
Baggins, Gundahar	9/17/1973	Male	65109	Commercial HMO	7	1.852	6.87		Zaragamba, Diamo...	5/15/2017
Baggins, Iago S	10/20/1962	Male	407581	Commercial HMO	5	10.37	9.91		Zaragamba, Diamo...	7/24/2017
Baggins, Madoc	7/4/1981	Male	74225	Commercial HMO	3	0.752	6.59		Zaragamba, Diamo...	6/27/2017
Baggins, Madoc	12/12/1995	Male	388851	Commercial HMO	2	0.154	4.3		Zaragamba, Diamo...	2/2/2017
Baggins, Melampus	9/30/1962	Male	34616	Commercial PPO	1	1.108	6.02		Zaragamba, Diamo...	5/24/2017
Baggins, Nina	11/25/1984	Female	641763	Commercial PPO	2	2.499	6.89		Zaragamba, Diamo...	5/22/2017
Baggins, Nora	9/23/1960	Female	937820	Commercial HMO	3	2.536	6.89		Zaragamba, Diamo...	7/31/2017
Baggins, Porro	7/5/1984	Male	366389	Commercial HMO	3	0.154	4.41		Zaragamba, Diamo...	
Baggins, Posco W	5/7/1986	Male	340678	QUEST Integration-Non ARD	2	9.398	9.78		Zaragamba, Diamo...	7/18/2017

# Panel Management: Patient Details Screen

- Face Sheets: one page summaries of information on patient
- Clinical: claims, clinical, lab, and hospitalization data
- Care gaps: all open care gaps for patient

PREV NEXT

(62 years)

ERG - 4.937  
ATI - 8.580

Race -  
Marital Status -  
Care Gaps - 4

Patient Notes  
Free text note  
Written by Diamond Zaragamba on 3/1/2017  
Time Spent (Min) 20'

CASES NOTES FACE SHEET CLINICAL RISK PROFILE ASSESSMENT

Selected Face Sheet: Patient Face Sheet

**Baggins, Amanda (F, 62 years)**      **ERG 4.937    ATI: 8.58**

DOB: 12/31/1955    Ins:      Appt Date:  
Patient #: 790170    PCP:      Appt with:

Care Opportunities	Total (4)	Action Items	Total (0)
Cervical Cancer Screening Controlling High Blood Pressure Influenza Vaccine (Adult) Review of Chronic Conditions			

Diagnoses	Total (55)	Active Medications	Total (0)
Z96.62 Presence of left artificial knee joint Z96.61 Presence of right artificial knee joint E78.00 Pure hypercholesterolemia, unspecified Z98.04 Bariatric surgery status			

CASES NOTES FACE SHEET CLINICAL RISK PROFILE

View:  Timeline  Category    Show: Significant Events,Diagnosis,Allerg

Date	Rendering Type	POS	Code	Type	Description
11/7/2017			00378180...	NDC Code	LEVOTHYROXINE 50 MCG T...
8/22/2017	General Surgery		Z96.651	ICD10	Presence of right artificial k...
8/22/2017	General Surgery		Z96.652	ICD10	Presence of left artificial k...
8/8/2017			00378180...	NDC Code	LEVOTHYROXINE 50 MCG T...
7/14/2017	Internal Medicine	OFFICE	Z9111	CPT4	
7/14/2017	Internal Medicine	OFFICE	99214	CPT4	OFFICE/OUTPATIENT VISIT
7/14/2017	Internal Medicine		Z68.31	ICD10	Body mass index (BMI) 31...
7/14/2017	Internal Medicine		R05	ICD10	Cough
7/14/2017	Internal Medicine		Z98.84	ICD10	Bariatric surgery status
7/14/2017	Internal Medicine		E03.9	ICD10	Hypothyroidism, unspecif...
7/14/2017	Internal Medicine		E78.00	ICD10	Pure hypercholesterolem...
7/14/2017	Internal Medicine		K21.9	ICD10	Gastro-esophageal reflux...
7/6/2017	Clinical Laboratory (Bil...	INDEPENDENT...	82274	CPT4	ASSAY TEST FOR BLOOD F...
7/6/2017	Clinical Laboratory (Bil...		Z12.11	ICD10	Encounter for screening fo...
7/6/2017	Clinical Laboratory (Bil...		Z12.11	ICD10	Encounter for screening fo...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	82607	CPT4	VITAMIN B-
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	83540	CPT4	ASSAY OF IR
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	36415	CPT4	ROUTINE VENIPUNCTU...

NOTES FACE SHEET CLINICAL RISK PROFILE ASSESSMENT

Enter R4R Data    Change Status To

Type	Care Opportunities	Actions
HMSA PTM Measure Progr...	Cervical Cancer Screening	
HMSA PTM Measure Progr...	Controlling High Blood Pressure	
HMSA PTM Measure Progr...	Influenza Vaccine (Adult)	
HMSA PTM Measure Progr...	Review of Chronic Conditions	

# Patient Details Screen: Face Sheets

Patient Face Sheet shows one page summary of information including care opportunities and compliance, RCC, recent diagnoses, medications, labs, vaccinations and more

**RAMONE, JOEY** (M, 65 years) Risk **1.686** ATI: **7.74**

DOB: **01/26/1953** Ins: **HMSA** Appt Date: **04/03/2018**

Patient #: **R000033616458-00** PCP: **McCoy, Hank** Appt with: **McCoy, Hank**

✓ Completed    ✗ Not Completed    - Excluded

Care Opportunities		Review of Chronic Conditions (RCC)	
<p>**** PAYMENT TRANSFORMATION PERFORMANCE MEASURES ****</p> <ul style="list-style-type: none"> <li>✗ Body Mass Index (BMI) Assessment</li> <li>- Comprehensive Adult Diabetes Care - A1c &lt; 8 Screening</li> <li>✓ Comprehensive Adult Diabetes Care - A1c Screening</li> <li>✓ Comprehensive Adult Diabetes Care - Blood Pressure Control</li> <li>✓ Comprehensive Adult Diabetes Care - Eye Exam</li> <li>✓ Diabetes Care - HbA1c in Control (&lt;9.0)</li> <li>- Influenza Vaccine (Adult)</li> <li>✓ Review of Chronic Conditions</li> <li>✓ Screening for Symptoms of Clinical Depression and Anxiety</li> <li>✓ Sharecare RealAge Assessment</li> <li>✓ Tobacco Screening and Cessation Counseling.</li> </ul> <p>**** MEDICARE STAR MEASURES ****</p> <ul style="list-style-type: none"> <li>- Medication Adherence for Diabetes</li> <li>✓ Medication Adherence for Hypertension</li> <li>✓ Medication Adherence for Cholesterol</li> </ul>		<ul style="list-style-type: none"> <li>✗ Diabetes with Acute Complications</li> <li>✓ Diabetes with Chronic Complications</li> <li>✓ Morbid Obesity</li> <li>✓ Intestinal Obstruction/Perforation</li> <li>✓ Disorders of Immunity</li> <li>✓ Major Depressive, Bipolar, and Paranoid Disorders</li> <li>✗ Vascular Disease with Complications</li> <li>✓ Acute Renal Failure</li> <li>✓ Traumatic Amputations and Complications</li> <li>✓ Amputation Status, Lower Limb/Amputation Complications</li> </ul>	
Diagnoses (most recent)		Active Medications	
Z68.29	Body mass index (BMI) 29.0-29.9, adult	ATROVENT	42 mcg 01/15/2018
I10	Essential (primary) hypertension	CIALIS	20 mg 02/01/2018
E78.00	Pure hypercholesterolemia, unspecified	LORAZEPAM	2 mg 10/05/2017
Z13.89	Encounter for screening for other disorder	MAXALT MLT	10 mg
N42.9	Disorder of prostate, unspecified	PRAVASTATIN SODIUM	40 mg 12/22/2017
Z23	Encounter for immunization	PRILOSEC OTC	20 mg 08/04/2017
R19.5	Other fecal abnormalities	ZIAC	5 mg-6.25 mg
K76.89	Other specified diseases of liver		
H25.13	Age-related nuclear cataract, bilateral		
Z11.59	Encounter for screening for other viral diseases		
M17.0	Bilateral primary osteoarthritis of knee		

# Patient Details Screen: Clinical

- View claims and clinical data in chronological order or by category
- Search for a code
- View rendering provider and source of data

CASES	NOTES	FACE SHEET	CLINICAL	RISK PROFILE	ASSESSMENT	CARE GAPS	COMM LOG
View: <input checked="" type="radio"/> Timeline <input type="radio"/> Category		Show: Significant Events,Diagnosis,Allerg		Search <input type="text"/>			
Date	Rendering Type	POS	Code	Type	Description	Rendering	Source
7/14/2017	Internal Medicine		K21.9	ICD10	Gastro-esophageal reflux disease without esop...	MAGLIULO, ANTHONY	[1721900003864P] HMSA Cla...
7/6/2017	Clinical Laboratory (Bil...	INDEPENDENT...	82274	CPT4	ASSAY TEST FOR BLOOD FEC	DIAGNOSTIC LABORAT...	[1720500001809P] HMSA Cla...
7/6/2017	Clinical Laboratory (Bil...		Z12.11	ICD10	Encounter for screening for malignant neoplas...	DIAGNOSTIC LABORAT...	[1720500001809P] HMSA Cla...
7/6/2017	Clinical Laboratory (Bil...		Z12.11	ICD10	Encounter for screening for malignant neoplas...	DIAGNOSTIC LABORAT...	[17201E0004872P] HMSA CL...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	82607	CPT4	VITAMIN B-	CLINICAL LABORATORI...	[1720000001084P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	83540	CPT4	ASSAY OF IR	CLINICAL LABORATORI...	[1720000001084P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	36415	CPT4	ROUTINE VENIPUNCTU	CLINICAL LABORATORI...	[1720000001084P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...		K91.2	ICD10	Postsurgical malabsorption, not elsewhere clas...	CLINICAL LABORATORI...	[1720000001084P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	85025	CPT4	COMPLETE CBC W/AUTO DIFF W	CLINICAL LABORATORI...	[1720000001084P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...	INDEPENDENT...	82306	CPT4	VITAMIN D 25 HYDRO	CLINICAL LABORATORI...	[1720000000960P] HMSA Cla...
7/3/2017	Clinical Laboratory (Bil...		K91.2	ICD10	Postsurgical malabsorption, not elsewhere clas...	CLINICAL LABORATORI...	[17195E0021956P] HMSA CL...
6/22/2017	General Surgery		K90.9	ICD10	Intestinal malabsorption, unspecified	FOWLER, STEVEN	[1718600000381P] HMSA Cla...
6/22/2017	General Surgery		Z98.84	ICD10	Bariatric surgery status	FOWLER, STEVEN	[1718600000381P] HMSA Cla...
6/22/2017	General Surgery	OFFICE	99213	CPT4	OFFICE/OUTPATIENT VISIT E	FOWLER, STEVEN	[1718600000381P] HMSA Cla...
6/22/2017	General Surgery	OFFICE	S9999	CPT4	SALES TAX	FOWLER, STEVEN	[1718600000381P] HMSA Cla...
5/12/2017			00378180...	NDC Code	LEVOTHYROXINE 50 MCG TABLET		[Y00000027920367] HMSA CL...

# Patient Details Screen: Care Gaps

- View all open care gaps for the patient
- Mark a measure as pending
- Add a measure note, enter supplemental data or submit R4R

CASES	NOTES	FACE SHEET	CLINICAL	RISK PROFILE	ASSESSMENT	CARE GAPS	COMM LOG
<input type="button" value="Enter R4R Data"/> <input type="button" value="Change Status To"/> <input type="button" value="Clear Selection"/> <input type="button" value="Save"/>							
<input type="checkbox"/>	Patient Name	Type	Care Opportunities	Actions	Created	Case Status	R4R Status
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Progr...	Cervical Cancer Screening	   	1/17/2018	Pending	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Progr...	Controlling High Blood Pressure	   	1/17/2018	New	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Progr...	Influenza Vaccine (Adult)	   	1/17/2018	New	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Progr...	Review of Chronic Conditions	   	1/17/2018	New	
Showing all 4 rows							

# Panel Management: Member ID

**Add Patient to Panel** [X]

Patient Name: Last Name [i] First Name [i] DOB [i] Contract: ANY [v]  
Member Id [i] Phone Number: ( )- - Gender: ANY [v] Provider: [v]  
 Break the Glass

Patient Name	DOB	Gender	Member Id	Phone
--------------	-----	--------	-----------	-------

Showing all 0 rows

Clear Search

## How to Add a Patient

**Reporting Member's Subscriber ID number on Cozeva, using the member ID card**

- For HMSA PPO, HMO, and Akamai Advantage members: Use one letter followed by 12 digits. Include all leading zeroes. Do not include the BlueCard prefix of the first three letters.

Example: If the card says XLHR000012345678, enter **R000012345678**.

- For HMSA QUEST Integration: Use 10 digits. Include all leading zeroes. Do not include the BlueCard prefix of the first three letters.

Example: If the card says XLQ0000123456, enter **0000123456**.

## Add Patient to Panel



[Back to Result](#)

Provider

Zaragamba Diamond



### PATIENT INFORMATION

Patient's Name

DOB

Gender

Health Center

Baggins,Belba

10/04/1955

Female

### CONTACT INFORMATION

Patient's Address

Phone Number

4176Belba Street

(636)-748-1357

### INSURANCE INFORMATION

Contract Name	Subscriber Name	Subscriber ID

### TERMS AND CONDITIONS

1. I/my practice had a discussion with the patient about the patient's choice to designate me as their PCP.
2. I have a medical need to access this patient's record.
3. I understand that the patient will be added to my panel and I/my practice is submitting a request to HMSA to attribute the patient to me.

I agree to the terms and conditions

Date of Request: 1/17/2018

English



[Print Preview](#)

[Close](#)

[Print & Submit](#)

## Add Patient to Panel

[Back to Result](#)



An Independent Licensee of the Blue Cross and Blue Shield Association  
1180-8925 FINAL

### Confirmation of Primary Care Provider Choice

Thank you for choosing my practice for your health care needs. I'll work with you to provide the best medical care and keep you as healthy as possible.

This notice confirms that:

1. You selected me as your primary care provider (PCP) for routine health and well-being care and to arrange care from specialists when needed.
2. If you're a member of HMSA's health maintenance organization (HMO), HMSA QUEST Integration, Essential Advantage HMO, or HMSA Akamai Advantage® PPO plans, my practice will let HMSA know that you chose me as your PCP. You should receive a new HMSA membership card with my or my practice's name within 10 days after HMSA receives the information.
3. As an HMSA member, you can choose any PCP from HMSA's network and you may change your PCP at any time.

My practice has sent the following information to HMSA to designate or confirm that I'm your PCP:

Patient's full name: \_\_\_\_\_ Patient's DOB: \_\_\_\_\_

Patient's HMSA plan:

[Close](#)

[Print](#)

[New Search](#)

## Request to Remove Patient

### PATIENT INFORMATION

<b>Patient's Name</b>	<b>DOB</b>	<b>Gender</b>	<b>Health Center</b>
Baggins,Amanda	12/31/1955	Female	<input type="text"/>

### CONTACT INFORMATION

<b>Patient's Address</b>	<b>Phone Number</b>
1234 Main Street	<input type="text" value="(808)-555-1234"/>

### INSURANCE INFORMATION

Contract Name	Subscriber Name	Subscriber ID

I'm requesting to remove this patient from my panel for the following reason (select one):

- The member is deceased
- The member has moved outside the service area
- Member care transferred to another provider
- Member discharged from practice

Date of Request: 1/17/2018

Close

Submit

# Panel Management: Transfer Registry and Attribution Activity Log

The Transfer Registry allows users to view pending additions and removals, as well as recently completed transfers. The Attribution Activity Log is a historical log of all attribution movement over time.

Transfer Patient Registry

Gardner Prima x Add Provider

Pending Add to Panel (1)

Patient Name	DOB	Gender	Member Id	Contract	Request Date	From	To	Requested By	Action
Amanda Baggins	12/31/1955	Male	790170	Commercial PPO	12/12/2017	Zaragamba, Diamond F	Gardner, Prima M L	Admin, System	<a href="#">Accept</a> <a href="#">Reject</a>

Pending Removal from Panel (1)

Patient Name	DOB	Gender	Member Id	Contract	Request Date	From	To	Requested By
Baggins, Duenna	9/30/1962	Male	265057	Commercial PPO	12/12/2017	Zaragamba, Diamond F	Gardner, Prima M L	Zaragamba, Diamond F

Attribution Activity Log

Gardner Prima x Add Provider

View: This Year

Patient Name	DOB	Gender	Member Id	Contract	Status	Request Date	From	To	Requested By
Amanda Baggins	9/30/1962	Male	265057	Commercial PPO	Added by Member Enrollment	12/10/2017	Gardner, Prima M L	Zaragamba, Diamond F	System, System
Adelbert Baggins	10/20/1955	Male	1034858	Commercial PPO	Removed by Member Enroll...	12/12/2017	Gardner Prima	HMSA, HMSA	Gardner Prima

Showing all 2 rows

# Panel Management: Patient Details Screen

View individual patient information using the tabs

← PREV    NEXT →

**Amanda Baggins (62 years)**  
Active (WithClaims)

DOB - 12/31/1955      ERG - 4.937      Race -  
Gender - Female      ATI - 8.580      Marital Status -  
Patient # - 790170      Care Gaps - 4

Patient Notes

Free text note  
Written by Diamond Zaragamba on 1/17/2018

Time Spent (Min)    20'    ADD

CONTACT INFORMATION    CASES    NOTES    **FACE SHEET**    CLINICAL    RISK PROFILE    ASSESSMENT    CARE GAPS    COMM LOG

Primary Language -  
Home Phone - (808) 555-1234  
Mobile Phone - (808) 555-7890  
Email - abaggins@tra...  
Preferred Email

CM Team -   
Care Manager -

Insurance -  
Contract - Commercial HMO  
Primary Physician -  
Attributed Physician - Diamond Zaragamba  
Attributed Physician Phone -

**AUTOMATED PREFERENCES**

ON     ON     ON   
Phone    SMS    Email

Employer    - S11002001

Selected Face Sheet: Patient Face Sheet

**Baggins, Amanda (F, 62 years)**      **ERG 4.937**    **ATI: 8.58**

DOB: **12/31/1955**    Ins:  
Patient #: **790170**    PCP:  
Appt Date:  
Appt with:

**Care Opportunities**    Total (4)    **Action Items**    Total (0)

Cervical Cancer Screening  
Controlling High Blood Pressure  
Influenza Vaccine (Adult)  
Review of Chronic Conditions

**Diagnoses**    Total (55)    **Active Medications**    Total (0)

Z96.652    Presence of left artificial knee joint  
Z96.651    Presence of right artificial knee joint  
E78.00    Pure hypercholesterolemia, unspecified  
Z98.84    Bariatric suroerv status

# Tasking Module

- This module is designed to streamline communication between contracted care management service specialists and the providers.
- The Tasking module allows users to easily view all of their Care Gap Opportunities across lines of business, the Supplemental Data Log, the R4R Queue in process, and the Approved R4R list.
- After EMR integration has been completed, providers will have advanced functionality to print patient face sheets per the daily schedule to use for pre-visit planning/prep or at the point-of-care to close care gaps.

# Tasking: Care Opportunities

## Pre-visit planning and managing care gaps

Care Opportunities

Hierarchy  Appointment Date  Contract

Physician  Measure type  Rule  Search

<input type="checkbox"/>	Last Name	First Name	DOB	Member Id	Home Phone	Physician	Practice	Risk	Opps
<input checked="" type="checkbox"/>	Baggins	Amanda	12/31/1955	790170	(808) 555-1234	Zaragamba Diamond	Diamond Zaragamba MD - 01	4.937	4
<input type="checkbox"/>	Baggins	Bellisima	06/14/1976	1139815		Zaragamba Diamond	Diamond Zaragamba MD - 01	0.297	4
<input type="checkbox"/>	Baggins	Elanor	03/15/1935	826226		Zaragamba Diamond	Diamond Zaragamba MD - 01	1.651	2
<input type="checkbox"/>	Baggins	Gundahar	09/17/1973	65109		Zaragamba Diamond	Diamond Zaragamba MD - 01	1.852	7
<input type="checkbox"/>	Baggins	Iaao	10/20/1962	407581	(567) 404-2779	Zaragamba Diamond	Diamond Zaragamba MD - 01	10.37	4

Showing all 872 rows

Change Status To

<input type="checkbox"/>	Patient Name	Type	Care Opportunities	Actions	Created	Case Status	R4R Status
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Program	Cervical Cancer Screening		1/17/2018	Pending	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Program	Controlling High Blood Pressure		1/17/2018	New	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Program	Influenza Vaccine (Adult)		1/17/2018	New	
<input type="checkbox"/>	Amanda Baggins	HMSA PTM Measure Program	Review of Chronic Conditions		1/17/2018	New	

# Tasking: Care gap huddle sheet

## Adelbert Baggins

Home Phone: | Date of Birth: 11/9/1982

Care Opportunities	Action	Assigned	Due	Status
C03 - Annual Flu Vaccine	Not Selected	11/23/2017	Not Set	New
Influenza Vaccine (Adult)	Not Selected	1/10/2018	Not Set	New

## Amaranth Baggins

Home Phone: (289) 411-8270 | Date of Birth: 10/20/1955

Care Opportunities	Action	Assigned	Due	Status
Adults Access to Preventive/Ambulatory Health Services Ages 45-64	Not Selected	11/23/2017	Not Set	New
Breast Cancer Screening	Not Selected	11/23/2017	Not Set	New
C03 - Annual Flu Vaccine	Not Selected	11/23/2017	Not Set	New
Cervical Cancer Screening	Not Selected	11/23/2017	Not Set	New
Colon Cancer Screening	Not Selected	11/23/2017	Not Set	New

## Amethyst Baggins

Home Phone: (521) 390-4785 | Date of Birth: 6/19/1985

Care Opportunities	Action	Assigned	Due	Status
C03 - Annual Flu Vaccine	Not Selected	11/23/2017	Not Set	New
Cervical Cancer Screening	Not Selected	11/23/2017	Not Set	New
Preventive Care and Screening: Tobacco Use: Screening and Cessation Intervention	Not Selected	11/23/2017	Not Set	New

## Athararic Baggins

Home Phone: (457) 921-1881 | Date of Birth: 12/25/1958

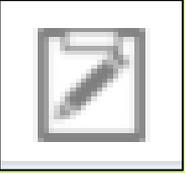
Care Opportunities	Action	Assigned	Due	Status
C03 - Annual Flu Vaccine	Not Selected	11/23/2017	Not Set	New
Colon Cancer Screening	Not Selected	11/23/2017	Not Set	New
Colorectal Cancer Screening	Not Selected	1/10/2018	Not Set	New
Influenza Vaccine (Adult)	Not Selected	1/10/2018	Not Set	New
Review of Chronic Conditions	Not Selected	1/10/2018	Not Set	New
Screening for Symptoms of Clinical Depression and Anxiety	Not Selected	1/10/2018	Not Set	New
Tobacco Screening and Cessation Counseling	Not Selected	1/10/2018	Not Set	New

## Belba Baggins

Home Phone: (636) 748-1357 | Date of Birth: 10/4/1955

Care Opportunities	Action	Assigned	Due	Status
C03 - Annual Flu Vaccine	Not Selected	11/23/2017	Not Set	New

# Tasking: Supplemental Data Entry



- Easily add supplemental data to meet quality measures by clicking the clipboard icon
- Upload supporting data
- Complete the process by filling out measure specific supplemental data entry forms

View Details

Care (Cervical Cancer Screening)

Amanda Baggins (62 years) DOB: 12/31/1955 Member ID: 790170

Phone: 8085551234 Address: , ,

Please indicate the services for which you have on record as received by the patient and date of the service.

**Cervical Cytology**

Procedure Date: mm/dd/yyyy

Procedure: [ ] Modifier: [ ]

Place of Service: [ ]

Performed By: [ ] Result: [ ]

**HPV Tests**

Procedure Date: mm/dd/yyyy

Procedure: [ ] Modifier: [ ]

Place of Service: [ ]

Performed By: [ ] Result: [ ]

Upload medical record documentation.

I confirm that there is documentation in the patient's medical record that indicates that the patient received this test or service during the measurement year. Furthermore, I understand that an audit may be conducted to verify all supplemental data submissions.

Submit Close

File Upload

Choose File

Upload

File History

Show Deleted

progress\_note.pdf

Written by Megan Calais on 12/11/2017

Patient	Measure	Procedure	Date	Status
Amende Baggins	HMSA PTM Measure Progr...	Cervical Cancer Screening	1/10/2018	New
Amende Baggins	HMSA PTM Measure Progr...	Controlling High Blood Pressure	1/10/2018	New

Showing all 10 rows

# Tasking: Requests for Reconsideration (R4R)



Easily submit R4R –

Requests for  
Reconsideration data

1. Prepare supplemental documentation file (PDF)
2. Click the silhouette icon
3. Record required data
4. Supply a statement of justification
5. Click the paperclip icon to upload supporting data
6. Click the Submit button

### Influenza Vaccine (Adult)

Otho Burrowes (21 years )      DOB: 06/18/1996      Member ID: 128160  
Phone:      Address:      

**Please note the following:**  
Upon initial review, HMSA may require additional medical information about the patient.  
HMSA will base its decision upon the criteria described in the HMSA program Guide, which is based on nationally recognized standards and guidelines, including NQF and HEDIS.

Provider	Provider Number	Provider Organization
Zaragamba, Diamond F	667438858	Woodhall

Provider Phone Number      HMSA Strategic Relationship Manager

( ) - \_\_\_\_ - \_\_\_\_      \_\_\_\_\_

Service Date (If applicable)  
MM/DD/YYYY      

Justification for Denominator Exclusion  
\_\_\_\_\_  
\_\_\_\_\_

Comments       Show History  
\_\_\_\_\_  
\_\_\_\_\_

I confirm that the HMSA supplemental data submission process did not allow me to submit the request described above (i.e., to remove the member from measure). I also confirm that the patient's medical chart includes all the necessary documentation for this request. I understand that the medical chart and other documentation are subject to review and/or audit.

**Submit**

### File Upload

Choose File      **Browse...**

**Upload**

### File History

Show Deleted  

\_\_\_\_\_

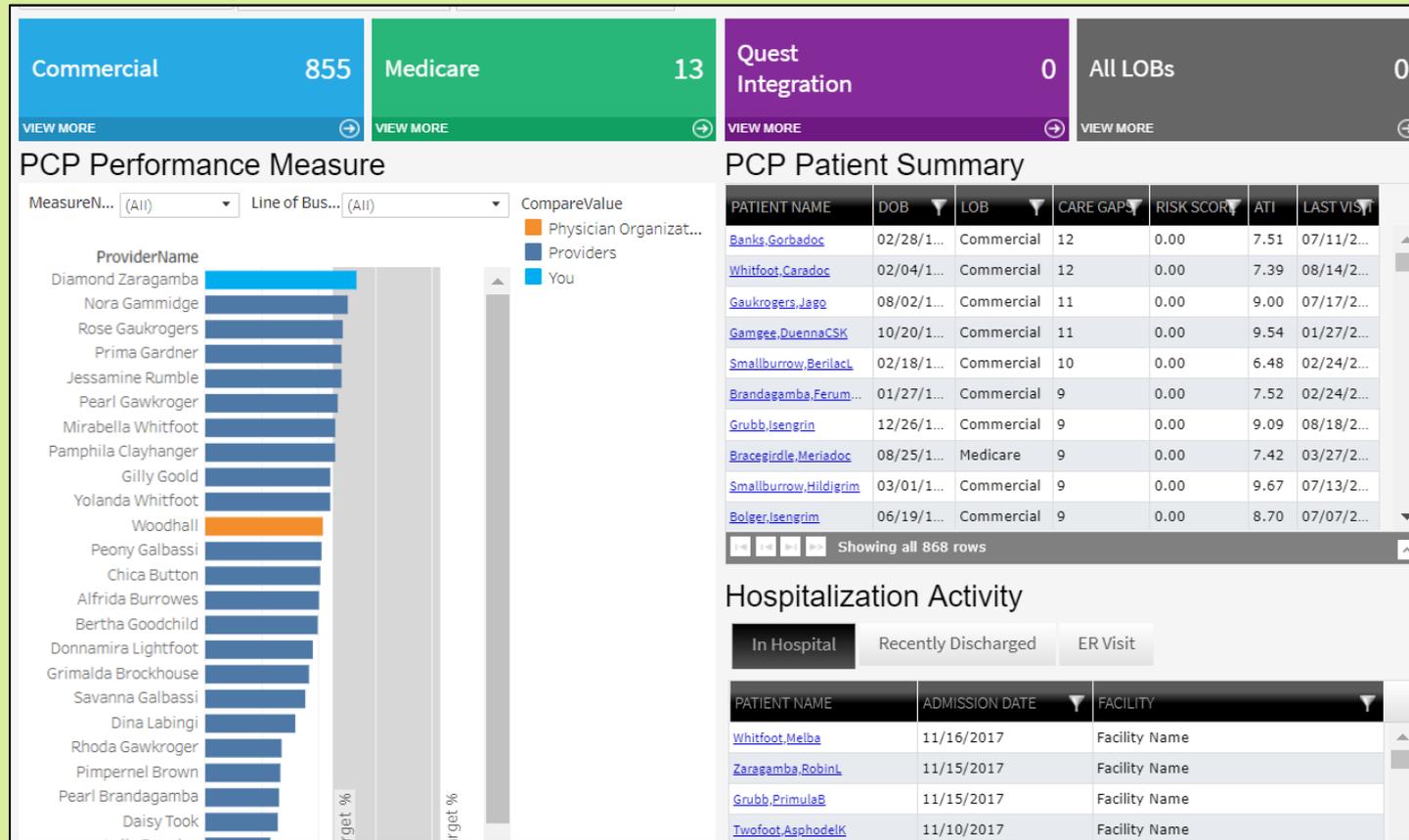
# PCP Dashboard

At the end of this section, you should understand the following:

- How to view performance compared to peers within your PO
- How to view list of patients and sort by care gaps, risk score, last visit date, etc.
- How to view hospitalization and ED activity for your patients
- How to drill down to the individual patient to see primary reason for hospitalization or ED visit

# PCP Dashboard

- Peer quality measure performance comparisons
- Review/sort patient lists by LOB, care gaps, or risk scores
- Quickly view actionable lists of Hospital/ED Utilizations



# Next Steps

- PCP and staff training: Currently through 3/31
  - Classroom training by PO
  - Live “hands-on” training classes at HMSA
    - April 5<sup>th</sup>, 11<sup>th</sup>, 12<sup>th</sup>, 19<sup>th</sup>
  - Sandbox Environment for practicing
- User Request Form: [bit.ly/coreohi3](https://bit.ly/coreohi3)

Thank you!