

# Managed Care Data Quality Monitoring Webinar

## Excel Data Templates

# Introduction

Amy Peterson, MPA

Managed Care Data Support Section Chief

# DHCS Staff

## » Speakers

- Amy Peterson
- Sarah Reed
- Jeff Jennings

## » Support

- Atif Habib
- Samantha Van
- Ema Anay Guerrero
- Abiy Gebereselassie
- Briana Saelee
- Soo Jung Kim

# Questions & Answers

- » For **GENERAL** questions, please submit your question to the WebEx chat and please ensure that your questions are visible to all participants, as opposed to sending a private chat to the host.
- » For **SPECIFIC** questions, please reach out to your Data Mailbox as will be instructed.

# Why is Template Data Collected and How is it used?

Amy Peterson

Managed Care Data Support Section Chief

# Agenda

- » Data Quality Monitoring Standards and Objectives
- » Why is Excel Data Collected and How is it used?
- » Present Challenges and Future of Excel Data Templates
- » Documentation Center
- » Communication
- » Next Steps

# Why Excel Templates?

- » Universal Usage of Microsoft Excel
  - Accessible
- » Data Template Introduction
  - Used primarily for novel and pilot data
- » Designing Data Templates
  - Data template design is led by program needs
- » Advantages of Data Templates
  - Organization of Data, Facilitates Early Analysis, Enhances Transparency
  - Allows time for data to mature and for DHCS to transition data collection to warehouse if determined there is that need

# What you can expect

## » Instruction page Tab

- Information on authority to collect, timeframes due, where to submit
- Variable list, column by column, and data dictionary with information on each type of variable

## » Tabs labeled by programmatic measure

- Plan Code
- Plan Name
- County
- Count or CIN level information related to the program measure
  - Data may be required in aggregate, or disaggregated, often by CIN

# Typical instruction Tab

## Example: CBAS

- » Instructions will be first tab on the template
- » Instruction tab will, in general, have authority, naming conventions for the file, information about where to submit, and definitions
- » Below main instruction may be highlighted or specific/special info or instructions, if applicable
- » Scrolling down will be the column names and data definitions for each tab

(example shown: CBAS, Template is Current)

These instructions outline the requirements, references, and headings/categories for the following reporting templates: CBAS Services and Assessments; CBAS Grievance and Appeals; and CBAS Call Center Complaints.

- Data must be submitted in Excel. Do not PDF the data.
- Three months of data must be aggregated into one figure to represent each quarter.

Each report is due 30 days after the end of each quarter of the calendar year. When the due date falls on a weekend (Saturday or Sunday), data must be submitted by COB on the Friday before the due date. For reference, the calendar-year quarters are listed below:

- Q1 – January, February, and March
- Q2 – April, May, and June
- Q3 – July, August, and September
- Q4 – October, November, and December

Reports should be submitted to "DHCS-MQMD-Monitoring" folder on the DHCS eTransfer site (<https://etransfer.dhcs.ca.gov>) and the file name needs to include the health plan's name, CBAS, and the calendar-year quarter. For example: MCPName.CBAS.Q1.2022.xls for regular submissions and MCPName.CBAS.Q1.2022.rev# for resubmissions.

Plan Code (Column A)
Plan Name (Column B)
County (Column C)
Reporting Quarter (Column D)
Number of Requests for CBAS (Column E)
Number of Members Assessed for CBAS (Column F)
Number of Members Ineligible to Receive CBAS (Column G)
<
>
☰
🔒 Instructions
🔒 1. Services and Assessment
🔒 2. Grievance
🔒 3. Appeals
🔒

# Current Excel Data Templates

Name	Frequency	Contact
Major Organ Transplant (MOT)	Annual	<a href="mailto:MCQMD@dhcs.ca.gov">MCQMD@dhcs.ca.gov</a>
Skilled Nursing Facility (SNF)	Annual	<a href="mailto:MCQMD@dhcs.ca.gov">MCQMD@dhcs.ca.gov</a>
Community Based Adult Services (CBAS)	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Dual-Special Needs Plan (D-SNP) Quarterly	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Dual-Special Needs Plan (D-SNP) Measures	Annual	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Dual Special Needs Plan (D-SNP) Mild Cognitive Impairment (MCI)	Annual	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU

# Current Excel Data Templates, (cont.)

Name	Frequency	Contact
Enhanced Care Management and Community Supports (ECM/CS)	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Managed Care Program Annual Report Critical Incidents (MCPAR CI)	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Managed Long Term Services and Supports (MLTSS)	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Non-Medical Transportation and Non-Emergency Medical Transportation (NMT/NEMT)	Monthly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Population Health Management Key Performance Indicators (PHM KPI)	Quarterly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU
Whole Child Model (WCM)	Monthly	<a href="mailto:DataExchange@dhcs.ca.gov">DataExchange@dhcs.ca.gov</a> c/o DCU

# Enhanced Care Management and Community Supports (ECM/CS)

- » Business Requirement: Monitoring and compliance oversight of Managed Care Plans' implementation of the new ECM/CS benefits
- » Frequency of Collection: Quarterly (Q1 due May 15, Q2 due August 15, Q3 due November 15, Q4 due February 15)
- » Program Contact: [CaAIMECMILOS@dhcs.ca.gov](mailto:CaAIMECMILOS@dhcs.ca.gov)
- » No upcoming revisions (was recently revised to include new plan codes for 2024)
- » In the process of being converted to JSON file format

# MCPAR Critical Incidents

- » Business Requirement: CMS Requirement for Managed Care Program Annual Report (MCPAR)
- » Frequency of Collection: Quarterly (Q1 due May 1, Q2 due August 1, Q3 due November 1, Q4 due February 1)
- » Program Contact: [MCQMD@dhcs.ca.gov](mailto:MCQMD@dhcs.ca.gov)
- » No upcoming revisions (was recently revised to include new plan codes for 2024)

# Dual-Special Needs Plan (D-SNP) Quarterly

- » Business Requirement: CMS requires a variety of care coordination and quality reporting from D-SNPs
- » Frequency of Collection: Quarterly (Q1 due May 31, Q2 due August 31, Q3 due November 30, Q4 due February 28)
- » Program Contact: [QualityandHealthEquityDiv@dhcs.ca.gov](mailto:QualityandHealthEquityDiv@dhcs.ca.gov)
- » No upcoming revisions (was recently revised to include new plan codes for 2024 and new data elements)

# Present Challenges and Future of Excel Data Templates

Sarah Reed

Research Data Specialist I, Data Collection Unit

# Present Challenges of Excel Data Templates

- » Excel formatting can be overwritten:
  - Templates have data validations, cell formatting and locked sheets
  - Copy & paste overwrites template formatting, unless pasted as plain text
- » Manual Process:
  - Manual entry can result in errors
  - Manual review can result in errors
  - Manual compilation can result in errors
- » Not machine readable. Unable to load into data warehouse.

# Most Common Errors

- » Blank cells:
  - The instructions tab specifies, but most columns require a value
  - When there is no numeric data to report, 0 must be entered
  - MCP Name, Plan Code & County must be entered on every row of data
- » Switching two or more columns of data
- » Wrong reporting period
- » File naming convention:
  - The instructions tab specifies
  - MCP name is critical to tell files apart

# Future of Excel Data Templates

- » Goal to reduce errors due to manual process of Excel templates
- » Move to machine readable formats, such as JSON
- » Investigate other data collection methods, such as surveys or forms

# DHCS Documentation Center

Jeff Jennings

Data Exchange Validation Unit Chief

# Document Center Access Request Procedure

- » The DHCS Documentation Center ([DHCS Documentation Center](#)) hosts Companion Guides, Technical Guides, Error Documentation, schemas, additional files/artifacts used by Trading Partners in working with Medicaid data submissions
- » Examples include the ECM/CS & MCPD/PCPA Technical Guides, the PACES 837 & 274 Companion Guides, PACES Response file schemas, other files and docs

# Document Center Access Request Procedure, (cont.)

- » Currently, most files hosted in the DHCS Documentation Center are related to Managed Care data submissions, and the associated CAPMAN and PACES systems.
- » SDMC [Short-Doyle Medi-Cal] Companion Guides related files are hosted separately for County Behavioral Health Plans at this time.
- » Channels and documents are added on an ongoing basis – Most recently created channel hosts the DCU Excel Data Templates
- » For Doc Center access or Technical assistance, contact [DataExchange@dhcs.ca.gov](mailto:DataExchange@dhcs.ca.gov)

# Communication

Amy Peterson, MPA

Managed Care Data Support Section Chief

# Communication

## » Data group mailboxes

- Documentation Center Access requests: [DataExchange@dhcs.ca.gov](mailto:DataExchange@dhcs.ca.gov)
- Webinar: [MCDSS@dhcs.ca.gov](mailto:MCDSS@dhcs.ca.gov)
- For Excel Data Template questions that Data Collection Unit (DCU) handles: [DataExchange@dhcs.ca.gov](mailto:DataExchange@dhcs.ca.gov), reference "DCU" in subject
- For Excel Data Template questions that MCQMD handles: [MCQMD@dhcs.ca.gov](mailto:MCQMD@dhcs.ca.gov)

» If the message is urgent, please mark [URGENT] in subject

# Next Steps

# DHCS Data Collection Status

Data Transaction type	Status
Medi-Cal Managed Care Provider Network data (274 Medical MCP)	In production
County Mental Health Plan 274 Provider Network Data (274 MHP)	In production
274 Drug Medi-Cal Organized Delivery Systems data (274 DMC-ODS)	DHCS is in the testing phase with Counties
Dental Managed Care Plans 274 Provider Network Data (274 Dental)	In production
BH – Short Doyle	In production
Encounter data	In production
Excel Data Templates	In production
MCPD/PCPA JSON file expansion	In production

# Resources



Services Individuals Providers & Partners Laws & Regulations Data & Statistics Forms & Publications Search

## Quality Measures & Reporting

DHCS monitors the quality of care provided to its members in a number of ways. Below are links to different types of reports that have been developed to monitor DHCS programs and the quality of care provided to our members.

## Quality Webinar Series

The resources below provide materials and webinar information related to the quality of managed care data.

- [Managed Care Data Quality Monitoring Webinar Series](#): DHCS is currently hosting a monthly webinar series to improve quality monitoring of Managed Care Data.
- [Frequently Asked Questions \(FAQ\)](#)
- [DHCS Documentation Center \(DDC\)](#): The DDC is our solution for sharing Companion Guides and other Managed Care docs and artifacts used by trading partners (MCPs). The PACES, CAPMAN, MCPD and PCPA Companion Guides and other docs and artifacts are posted here and are available to trading partner staff. Access to the DDC is available to trading partners upon request. Access requests can be sent to [dataexchange@dhcs.ca.gov](mailto:dataexchange@dhcs.ca.gov).

## Quality Measures

The reports below provide quality measures based on administrative and clinical data such as the Healthcare Effectiveness Data and Information Set (HEDIS) measures and self-reported data such as the Consumer Assessment of Healthcare Providers and Systems (CAHPS) surveys.

- [Dashboard Initiative](#): DHCS is developing a comprehensive dashboard initiative to strengthen public reporting practices throughout the department while improving transparency and accountability.

## » DHCS Quality Webinar Series webpage

- Data & Statistics -> Reports -> Quality Measures and Reporting

# Resources (cont.)



- Services
- Individuals
- Providers & Partners
- Laws & Regulations
- Data & Statistics
- Forms & Publications
- Search

## Managed Care Data Quality Monitoring Webinar Series

This monthly webinar series will allow for continued discussion on the status of Managed Care Data Quality Monitoring, which is currently underway at DHCS. Additionally, it will allow for ongoing plan on the development of the necessary changes of the Managed Care Data Quality Monitoring. This discussion will include on the Quality Monitoring Process of 274 Physical Health Medi-Cal Managed Care Provider Data, Dental Data, Mental Health Plan Data, Drug Medi-Cal Organized Delivery System Data, Encounter Data, and Behavioral Health Short Doyle Data.

If you would like notifications regarding these and any upcoming webinars, [please click here](#) to Subscribe/Unsubscribe.

Please contact [MCDS@dhcs.ca.gov](mailto:MCDS@dhcs.ca.gov) if you have questions about this webinar series.

**Next webinar: February 28, 2024 at 10 a.m. (Behavioral Health Short Doyle)**

## Additional Resources and Related Materials

- [DHCS Documentation Center \(DDC\)](#): The DDC is our solution for sharing Companion Guides and other Managed Care docs and artifacts used by trading partners (MCPs). The PACES, CAPMAN, MCPD and PCPA Companion Guides and other docs and artifacts are posted here and are available to trading partner staff. Access to the DDC is available to trading partners upon request. Access requests can be sent to [dataexchange@dhcs.ca.gov](mailto:dataexchange@dhcs.ca.gov).
- [DHCS Managed Care Data Quality Monitoring Frequently Asked Questions](#)
- [Managed Care Data Quality Webinar Glossary](#)

[Back to the Quality and Measures Reporting page](#)

## 2024 Webinar Schedule

Month	Topic	Webinar Date	Webinar Materials
January	<a href="#">Semi Annual Data Checks</a>	1/31/2024	<a href="#">Presentation Slides</a>
February	Behavioral Health Short Doyle	2/28/2024	Available March 2024
March	Qualitative Data Templates	3/27/2024	Available April 2024
April	Annual Address	4/24/2024	Available May 2024
May	274 Medical Managed Care Provider Data	5/29/2024	Available June 2024
June	274 Behavioral Health / Mental Health Program Data	6/26/2024	Available July 2024
July	Semi Annual Data Checks	7/31/2024	Available August 2024
August	Encounter Data	8/28/2024	Available September 2024
September	274 Dental Data	9/25/2024	Available October 2024
October	Monthly Data Checks	10/30/2024	Available November 2024
November	274 Behavioral Health / Drug Medi-Cal ODS	11/27/2024	Available December 2024

## 2023 Webinars

## » [Webinar Series Webpage](#)

- Recording/script
- PPT slides deck
- Upcoming Webinar schedule
- **Distribution List Subscription Link**  
(newly added)

## » [Frequently Asked Questions](#)

## » [Glossary](#)

# Upcoming Webinar Schedule

Month	Focus on
March 2024	Excel Data Templates
<b>April 2024</b>	<b>Annual Address</b>
May 2024	274 Medical Managed Care Provider Data
June 2024	274 MHP
<b>July 2024</b>	<b>Semi Annual Data checks</b>
August 2024	Encounter Data

# Upcoming Webinar Schedule, (cont.)

Month	Focus on
September 2024	274 Dental
<b>October 2024</b>	<b>Monthly Data Checks</b>
November 2024	274 DMC-ODS
December 2024	MCPD/PCPA Files and Expansion
<b>January 2025</b>	<b>Semi Annual Data checks</b>
February 2025	BH Short Doyle

# Questions?

**Thank you!**

