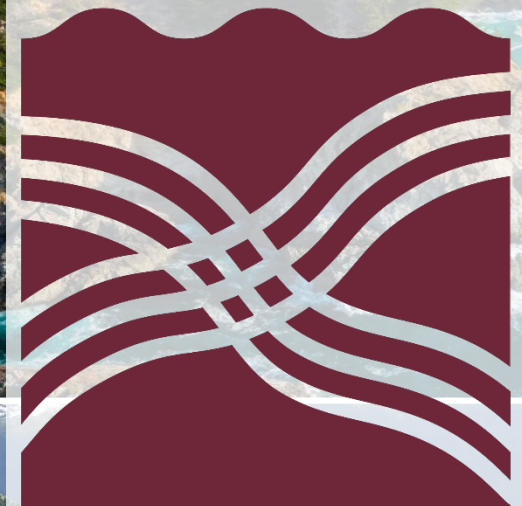


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ECM Provider & PHC Reporting Training

UPDATED

December 1, 2022

Agenda

- ECM Provider Training (*Reminder*)
- ECM Reporting Templates
 - Targeted Engagement List (TEL) PHC
 - Provider Capacity Survey
 - Member Information File (MIF)
 - ECM Provider Return Transmission File (RTF)
 - ECM Provider Initial Outreach Tracker File (IOT)
 - Potential ECM Member Referral File (*Optional File*)
- Reporting Schedule & Frequency
- Issues & Troubleshooting
- Outreach & Engagement

ECM Provider Trainings

ECM Provider Reporting Training

- ecm@partnershiphp.org

Provider Portal & TAR Training

- esystemssupport@partnershiphp.org

ECM New Provider Trainings

Collective Medical Training

- lisa.craig@collectivemedicaltech.com

Claims Training

- claimsecmhelpdesksr@partnershiphp.org

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ECM Reporting Templates

Targeted Engagement List (TEL)

- The TEL is uploaded via Collective Medical to the your ECM Provider Portal with members in (1) of (3) statuses:
 - **ECM Referred**
 - Member is potentially ECM Eligible and has been referred for ECM Services
 - **ECM In-Process**
 - Member is Eligible and Approved, and Outreach has begun
 - **ECM Enrolled**
 - ECM Member Engagement has started and Individualized Care Plan has been developed and is on file with an approved TAR

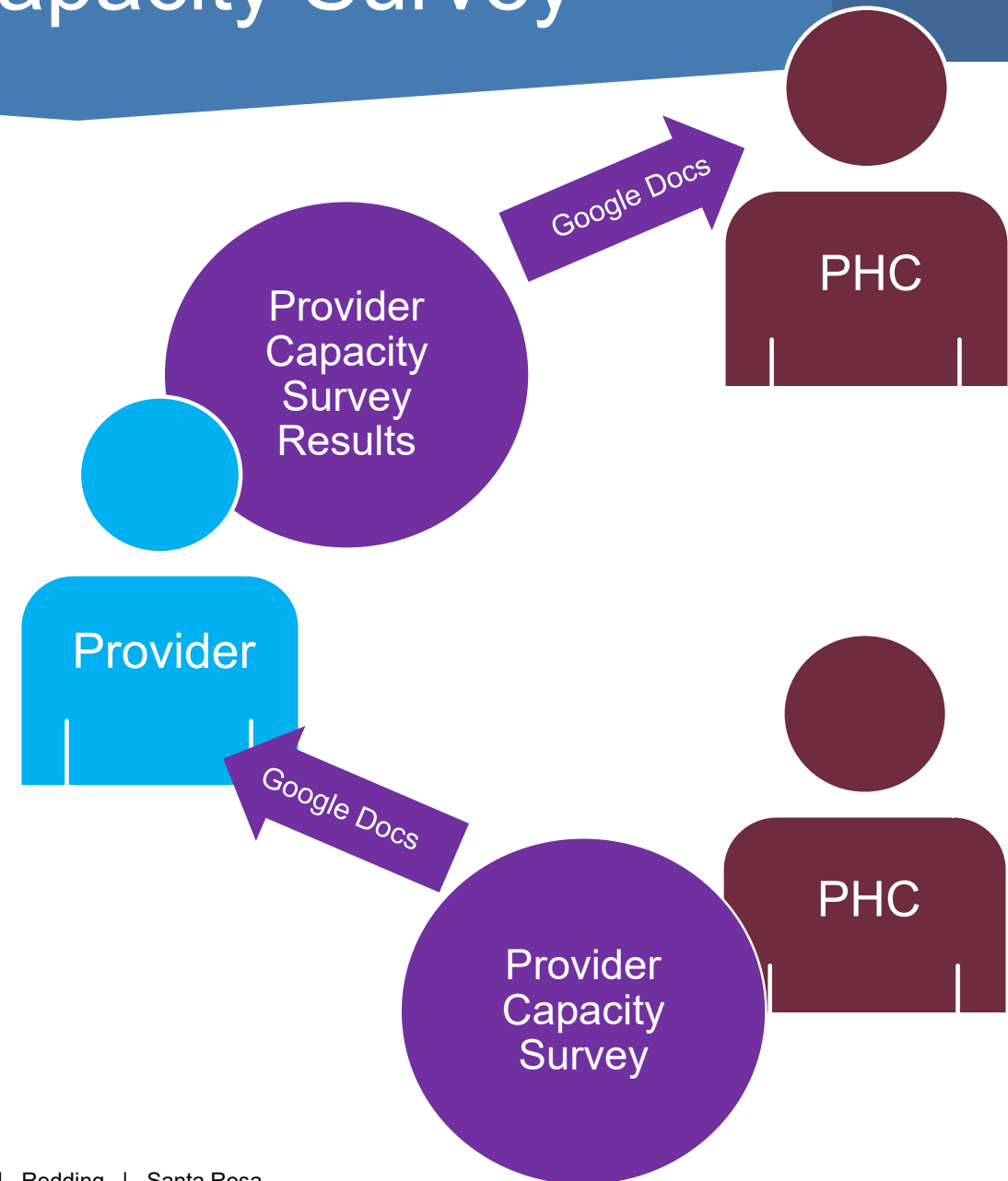
Targeted Engagement List (TEL) (cont.)

- It is the Provider's responsibility to check Collective Medical for new/continuing TEL Members.
- Collective Medical can set up a scheduled report to help identify the list of members on the TEL each month.



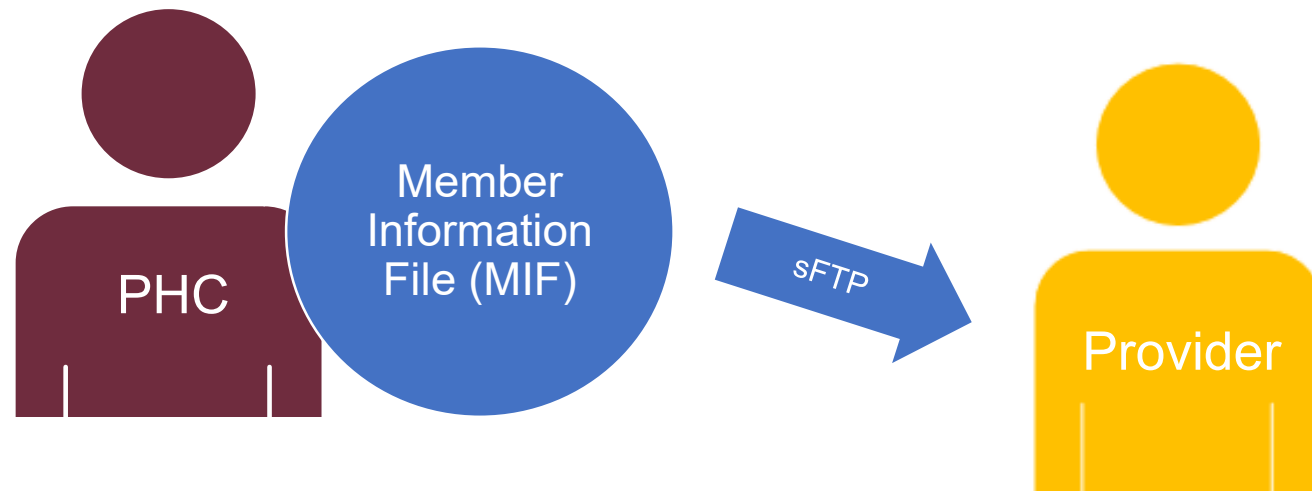
Provider Capacity Survey

- PHC will send the Provider Capacity survey via Google Docs to track ECM Provider capacity.
- The ECM Provider will complete the survey and PHC will analyze the results to help assist with next months referral count.



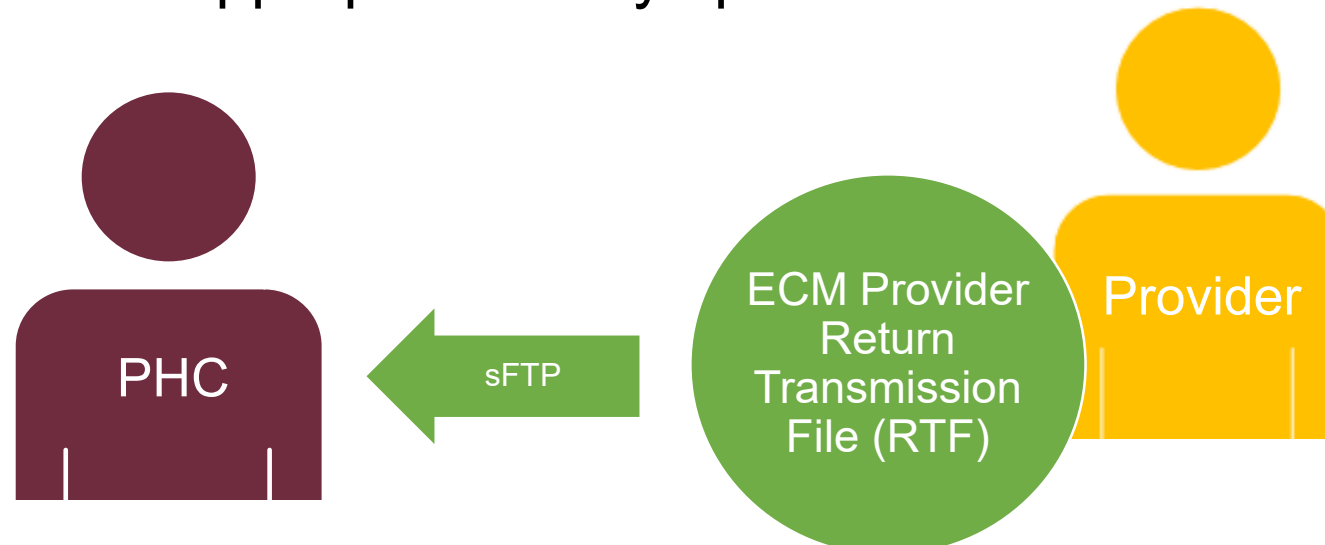
PHC Member Information File (MIF)

- PHC is responsible for sending each ECM Provider a Member Information File containing clinical and non-clinical information for **newly referred/continuing** members that will aid the provider in assisting members with their care needs.
- Information provided in the templates are based on DHCS guidance.



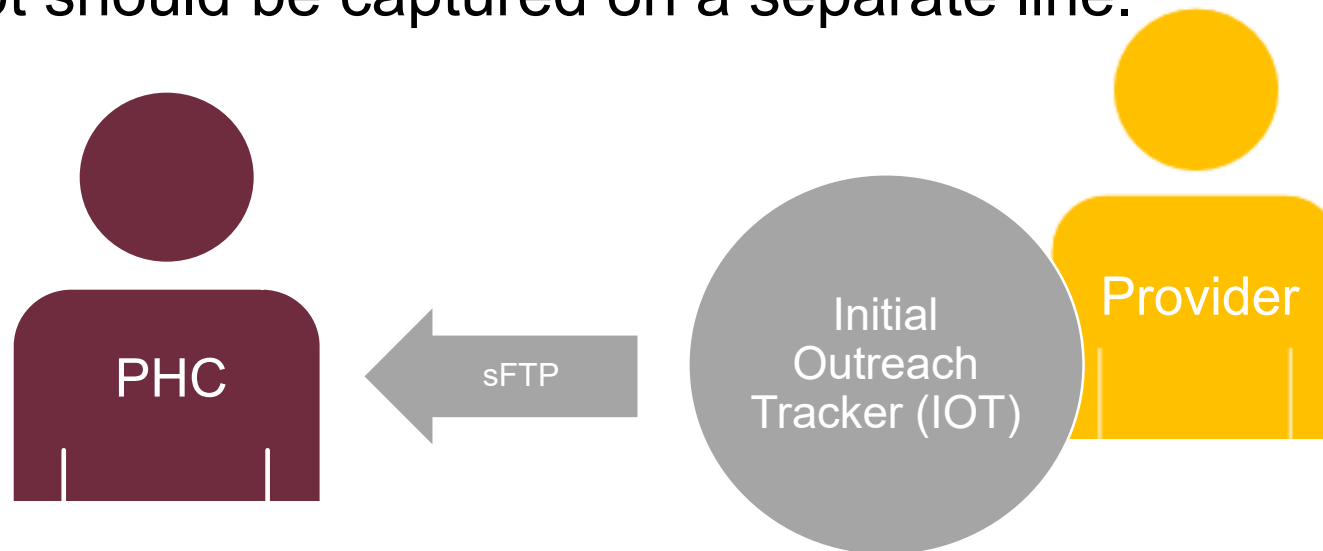
ECM Provider Return Transmission File (RTF)

- 1 of 2 files the ECM Provider is responsible for per DHCS guidelines.
- The members who need to be present on the file are any newly referred/continuing members from the MIF and members the provider has identified as eligible.
- The provider will document successful encounters for enrolled members only.
- In order to get accurate and efficient data exchanges, **all** fields should be completed with the appropriate entry specifications listed on the templates.



ECM Provider Initial Outreach Tracker File (IOT)

- 2 of 2 files the ECM Provider is responsible for per DHCS guidelines.
- The IOT is the ECM Providers' responsibility to enter data for any members identified during outreach attempts.
 - Pending Outreach (Referred members on MIF)
 - Currently In Outreach
 - Provider Identified Referrals
- Each attempt should be captured on a separate line.



Potential ECM Member Referral File

- The Potential ECM Member Referral File is an optional file that is the ECM Provider's responsibility to complete.
- Can be utilized by ECM Providers to assist in tracking member referrals and consideration for enrollment in ECM.

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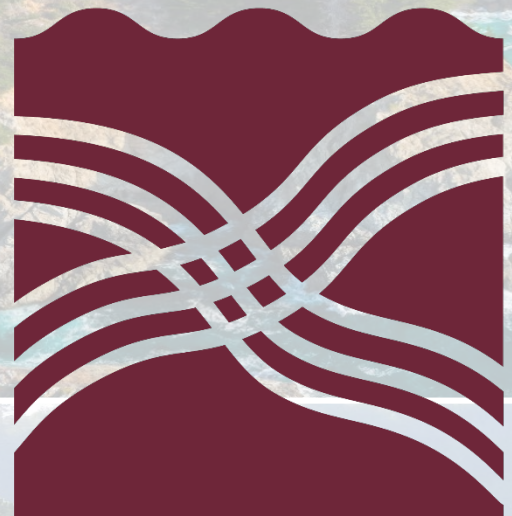
Reporting Schedule & Frequency

ECM Provider Reporting Schedule

Updated
December 2022

Report & Naming Convention	Due Date	Responsible Party
<ul style="list-style-type: none">Targeted Engagement List (TEL) <i>(via Collective Medical)</i>PHC sends Member Information File (MIF) <i>(via sFTP)</i><ul style="list-style-type: none"><i>Facility Name_MIF_Date</i>Provider Capacity Survey <i>(Google Forms survey via email link)</i>Email sent to providers notifying upload has occurred	1 st week of the Month	PHC
<ul style="list-style-type: none">Provider Capacity Survey Due	2 nd Monday of the Month	ECM Provider
<ul style="list-style-type: none">ECM Provider Return Transmission File (RTF) <i>(File sent via sFTP Folders)</i><ul style="list-style-type: none"><i>Facility Name_RTF_Date</i>ECM Provider Initial Outreach Tracker (IOT) <i>(File sent via sFTP Folders)</i><ul style="list-style-type: none"><i>Facility Name_IOT_Date</i>Potential ECM Member Referral File <i>(Optional File)</i>	2 nd Friday of the Month	ECM Provider
<ul style="list-style-type: none">Data Analysis, Review & Screening<ul style="list-style-type: none">Communicate Discrepancies found on files <i>(via email)</i>	3 rd Week of the Month	PHC
<ul style="list-style-type: none">Create new MIFs and TELs and prepare next month's Capacity Survey	4 th Week of the Month	PHC

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Issues & Troubleshooting

Issues & Troubleshooting

- For issues or questions related to the reporting templates, submissions via the sFTP folders, or any other issues, please reach out to:

ECM@partnershiphp.org

- Partnership will assist with any troubleshooting issues that may arise.

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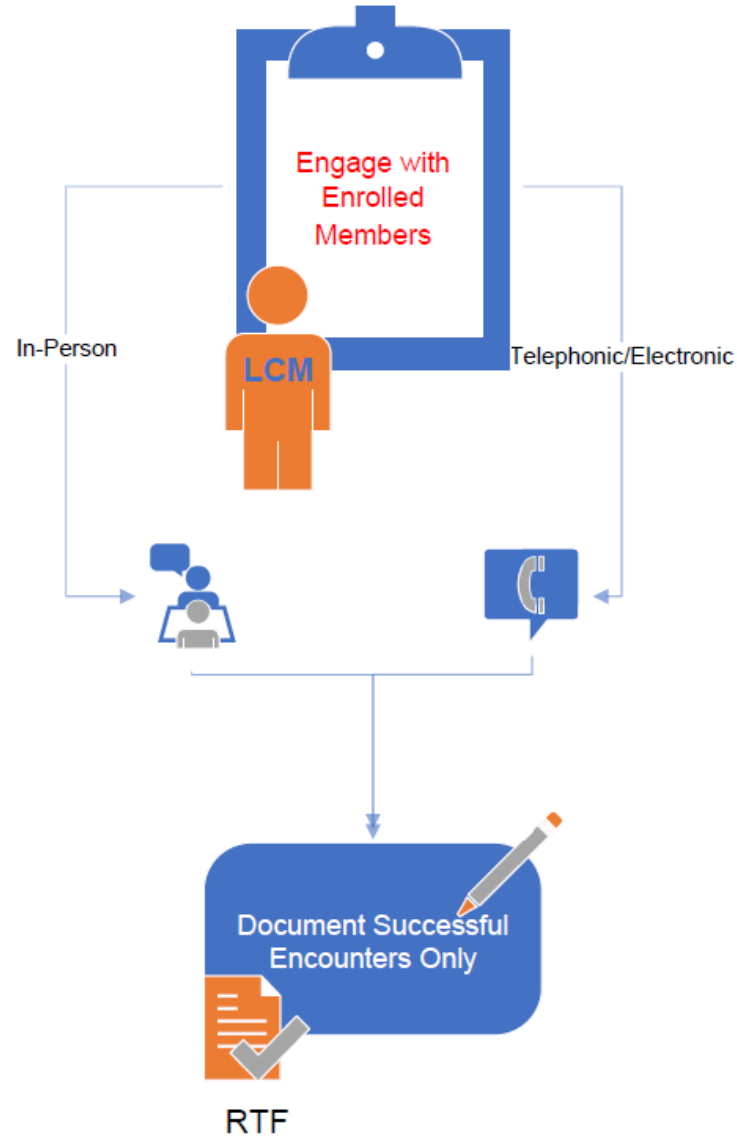
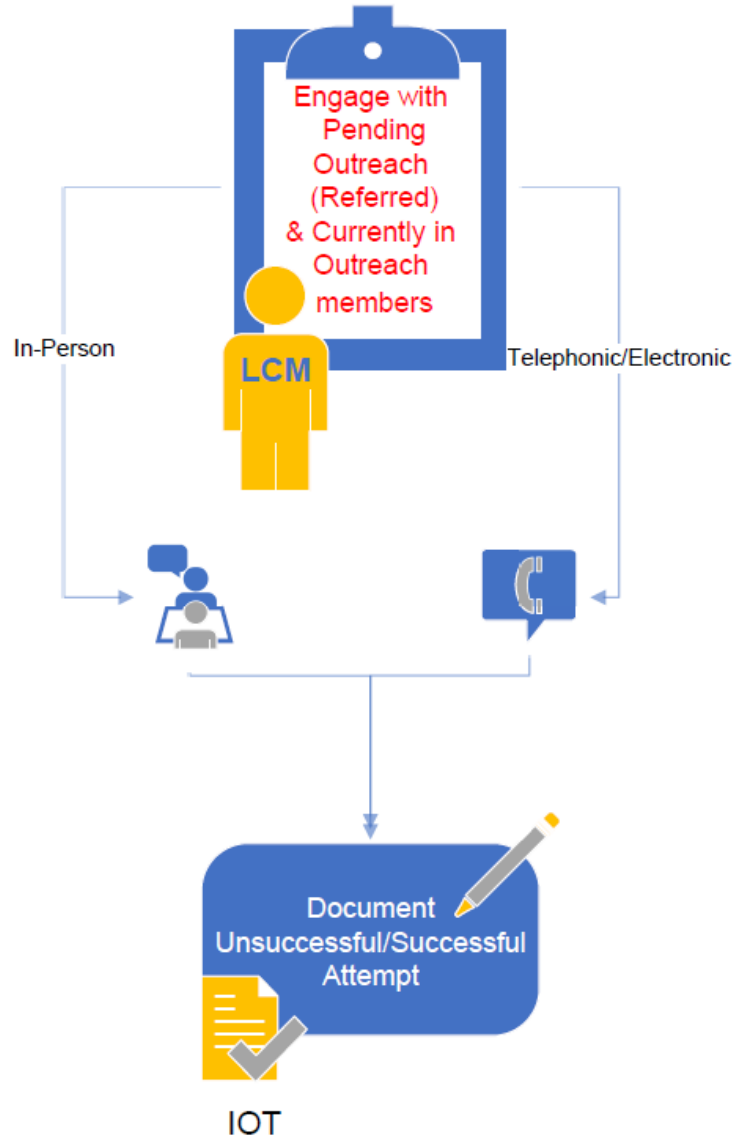


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Outreach & Engagement

Capturing Member Outreach & Encounters Workflow



IOT Process:

- Pending Outreach (Referred) and Currently in Outreach Members -not enrolled in ECM
- LCM reaches out to engage member via in-person or telephonic/electronic
- LCM documents on the IOT:
 - CIN
 - Staff Member Type (1 or 2)
 - Date
 - In-Person or Telephonic/Electronic
- These are successful and unsuccessful outreach attempts

RTF Process:

- Enrolled Members
- LCM tracks successful encounters with the member
- Documents on the RTF number of encounters via in-person and/or telephonic/electronic

Scenario #1

- Member referred to ECM Provider via file
- Provider adds any engaged/identified members to their RTF
- Provider captures any unsuccessful/successful encounters with the member prior to enrollment on the IOT.
 - Once the member is enrolled in ECM the successful encounters with the member are documented on the RTF

Scenario #2

- Provider outreaches members they think may be a good fit for ECM and documents the outreaches (successful/unsuccessful) on the IOT.
 - The members should also be added to the RTF under their enrollment status –
 - Pending Outreach (referred/identified for ECM)
 - Currently in Outreach (provider has connected with the member; not enrolled just yet)

Scenario #3

- Provider enrolls a member via their own referral source and adds them to the RTF with their TAR authorization dates and places the member in the enrolled status and documents the successful encounters on the RTF.

Questions?

- Please reach out to ECM@partnershiphp.org for any questions you may have following this presentation.

