Integrating Risk, Quality and Health Management with Electronic Medical Records

Presented By:

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Greg Pastor, *Managing Director, Risk Adjustment Operations* – **Advantasure**

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We are a network of health care professionals addressing the challenges posed by the emerging landscape of value-based care and government health care reform.

OUR MISSION

Our mission is to provide a community for like-minded professionals to come together for networking, education, and industry collaboration to stay ahead and advance their careers.

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THREE COMMUNITIES

QUALITY &
REVENUE
COMMUNITY

MEDICARE
MEMBER
ACQUISITION
& EXPERIENCE
COMMUNITY

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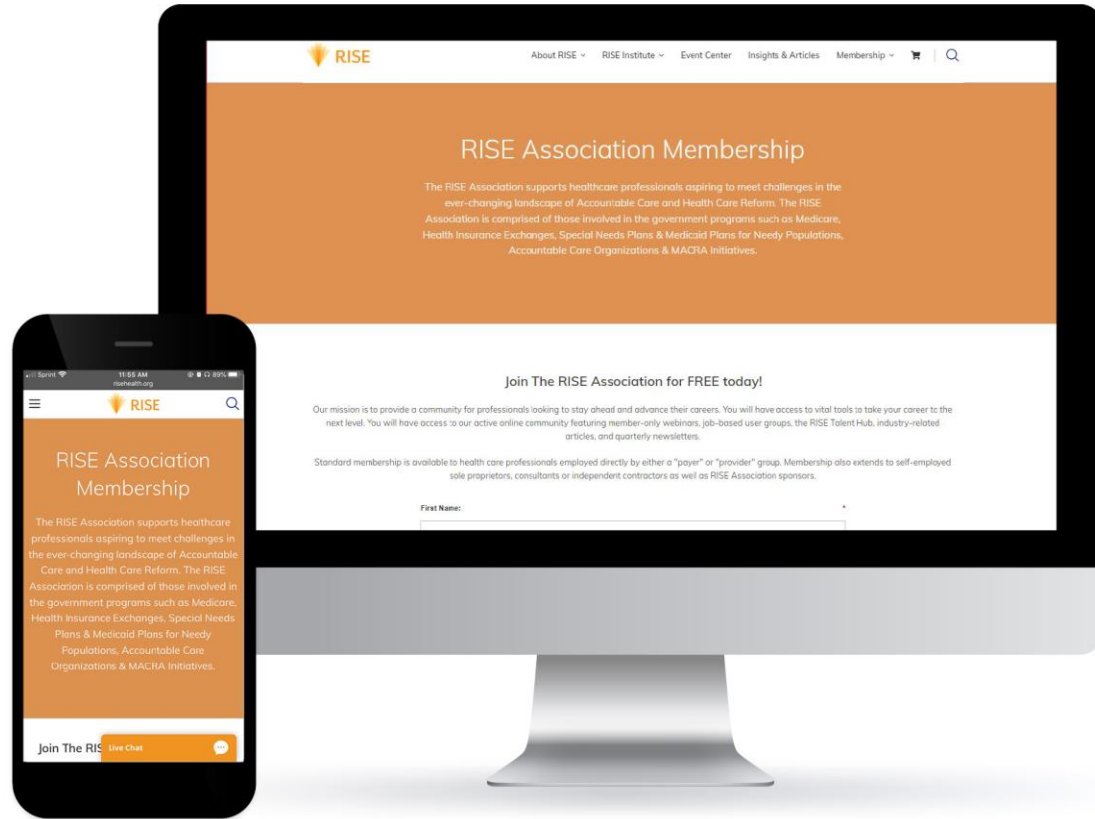
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Agenda

1. Point of Care EMR integration with EPEC

2. Integrating Risk & Quality with Symphony

3. To the Future: Fusing EPEC & Symphony

Background
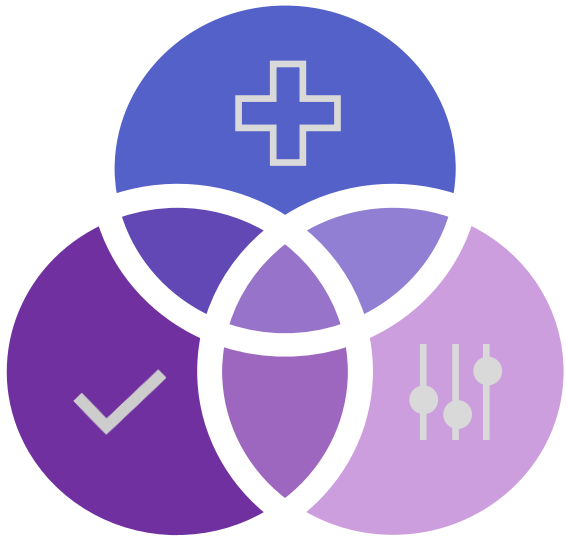
Advantasure Delivers Experience and Results for Clients

Re-named in 2018, **Advantasure** has provided technology solutions and services to health plans nationwide since 2015

Over **2.2 million members** served **throughout 27 states** and Puerto Rico

Manages over $7 billion in risk adjustment-related revenue and over $300 million in quality-related bonus revenue

**Increases** operational efficiencies through 99% enrollment accuracy

Health Management clients have reported **significant productivity increases**

ADVANTASURE™
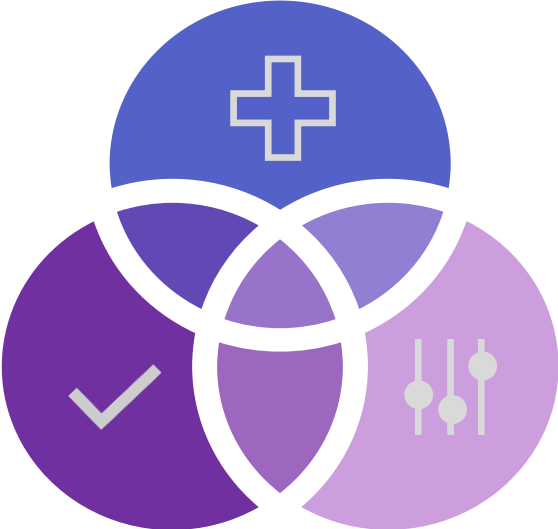Fueling Accelerated Performance

Solving Challenges for Client Plans

- Strong team with deep knowledge of risk adjustment, health management, core administration and industry drivers

- Innovative, versatile solutions for a range of plans

- Our solutions serve plans with different geographies, population densities, membership cultures

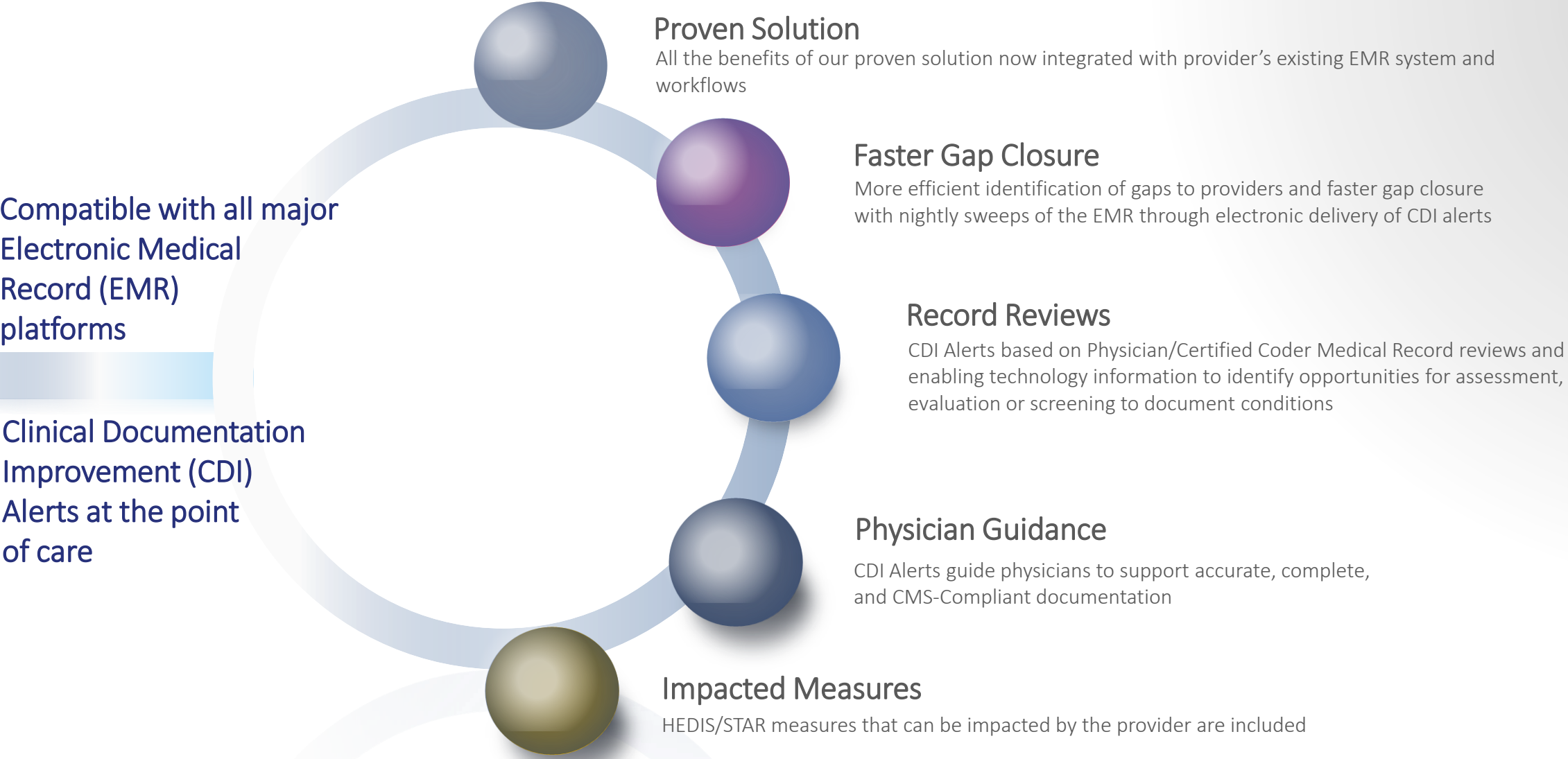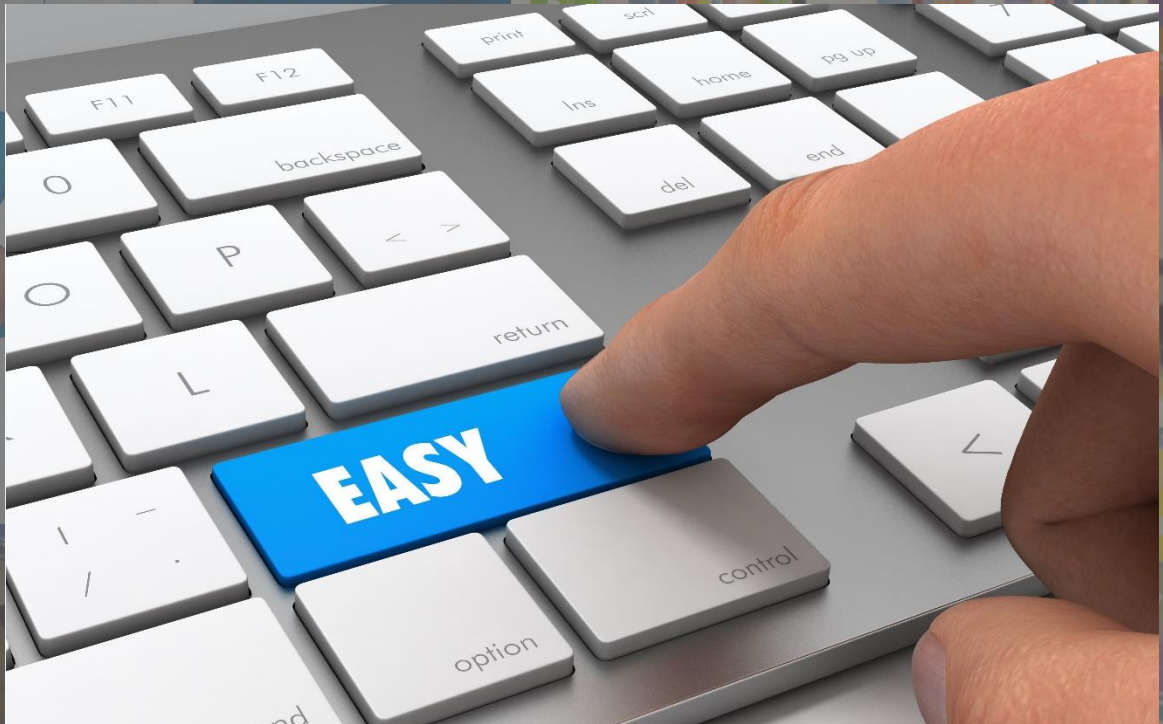- Full-service and technology platform options
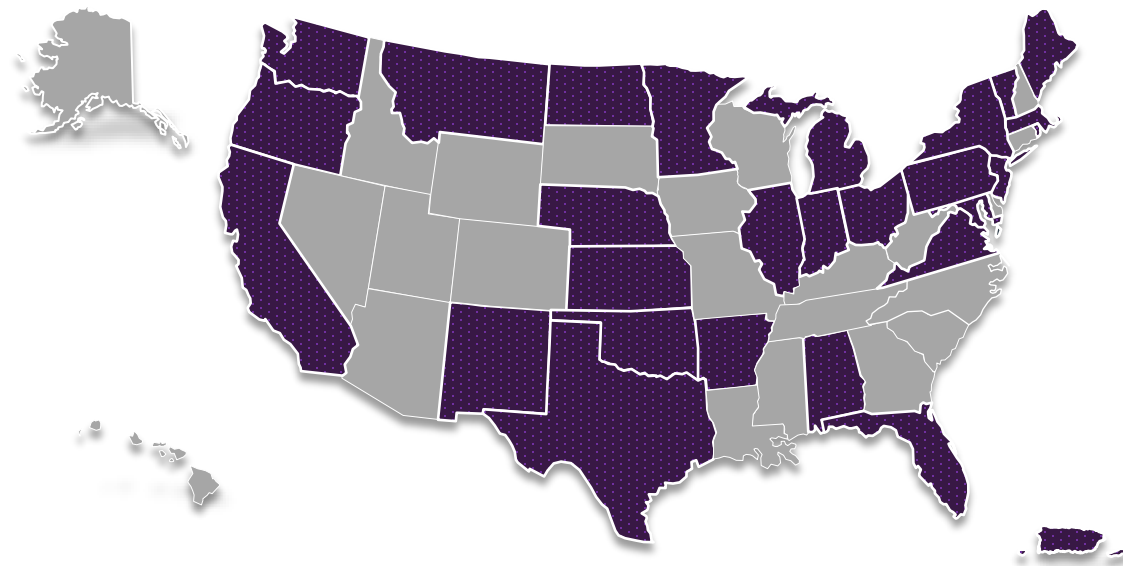
31 clients across 27 states and Puerto Rico

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1. Point of Care EMR Integration with EPEC
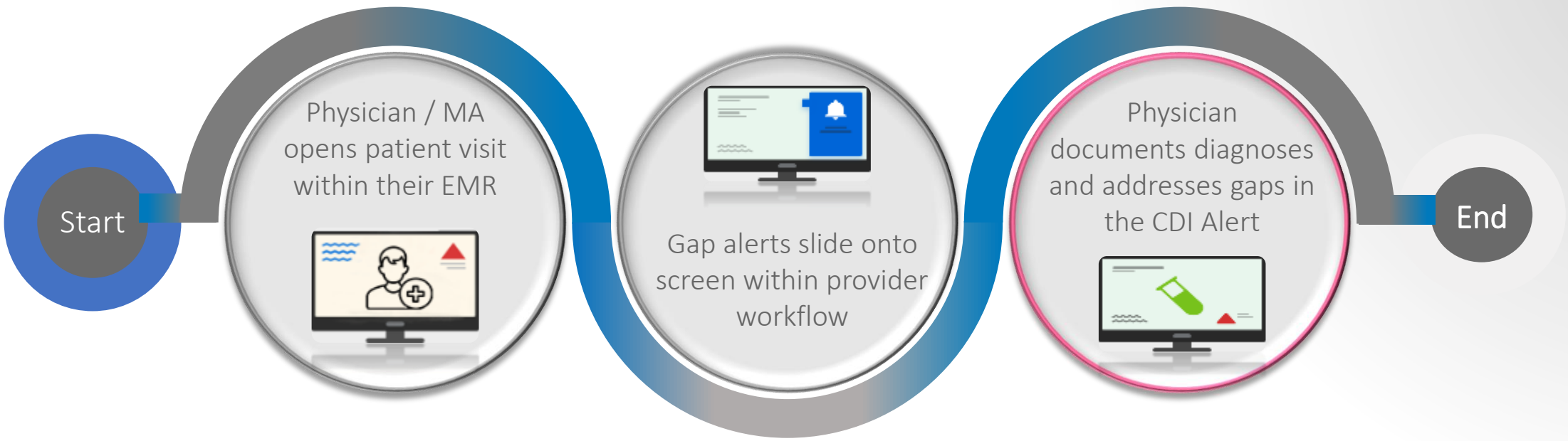
Provider Engagement Coordination Program

Compatible with all major Electronic Medical Record (EMR) platforms

Clinical Documentation Improvement (CDI) Alerts at the point of care

Proven Solution
All the benefits of our proven solution now integrated with provider's existing EMR system and workflows

Faster Gap Closure
More efficient identification of gaps to providers and faster gap closure with nightly sweeps of the EMR through electronic delivery of CDI alerts

Record Reviews
CDI Alerts based on Physician/Certified Coder Medical Record reviews and enabling technology information to identify opportunities for assessment, evaluation or screening to document conditions

Physician Guidance
CDI Alerts guide physicians to support accurate, complete, and CMS-Compliant documentation

Impacted Measures
HEDIS/STAR measures that can be impacted by the provider are included

Onsite PEC will continue to be offered in select cases.

PEC Integrates with All Major EMR Systems

Providers use their existing EMR system

Start

Physician / MA opens patient visit within their EMR

Gap alerts slide onto screen within provider workflow

Physician documents diagnoses and addresses gaps in the CDI Alert

End

In patient exam room

Medical assistant (MA) normally assists the physician in addressing open gaps before and/or after the patient visit

Track performance

Measure performance over time with insightful reporting — and drill down to identify low-performing providers and problem gaps

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Clinical Documentation Improvement (CDI) Alert

CDI Alerts integrated within the EMR leads to greater efficiencies.

Engage provider with electronic CDI Alerts, enable them to share actionable inputs within their existing EMRs.

Including Star Measure gaps on the CDI Alert allows provider to address gaps with the member at the point of care.

All documentation for the management or treatment of conditions resides in the EMR.

All member conditions need to be assessed and reported to CMS at least once per calendar year.

Progress Note Review and Queries

The coding team sends queries to providers to flag additional questions or inconsistencies:

- Provider receives query if medical documentation doesn't support the diagnosis.

- Provider amends medical record to meet coding guidelines.

- If no changes are made to medical record, provider corrects response to CDI Alert.

QUERY

For the **QUERIES** presented:

Check **"YES"** if an addendum was made in the medical record with the requested documentation

Check **"NO"** if no changes were made in the medical record

Expected Outcomes

- Medical documentation supports diagnosis

- Medical record meets coding guidelines

Closing Star Gaps on CDI Alerts

Clinical care gaps (Stars/HEDIS/Pharmacy) are included on the CDI Alerts to facilitate the actionable feedback at the point of care.

- Health plan can customize the clinical gaps that appear on CDI Alerts and the prioritization in which they appear

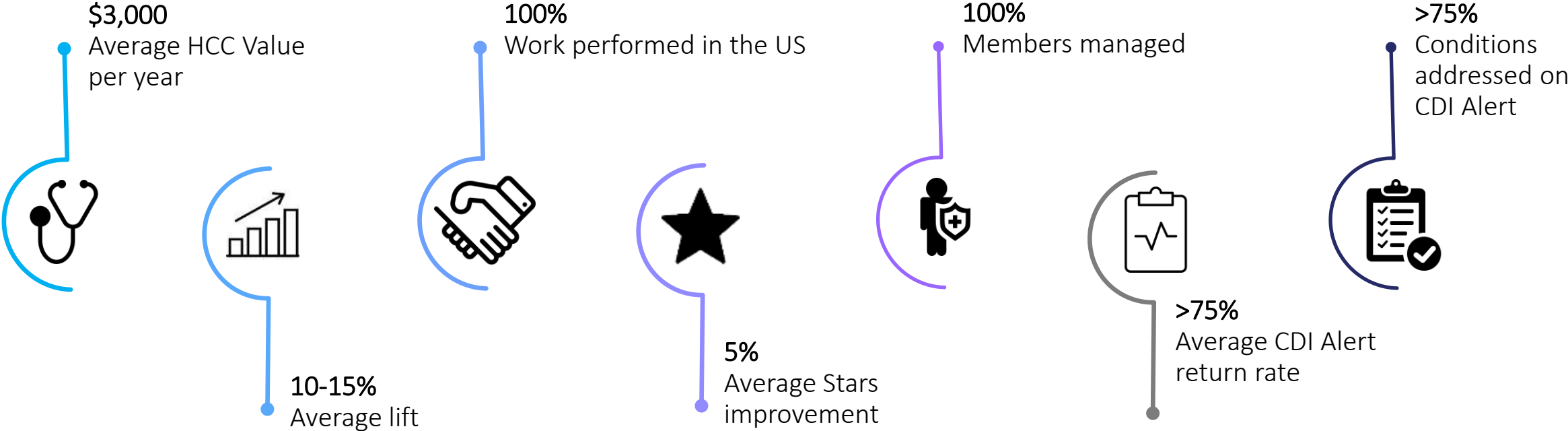- The CDI Alert requests that the provider take action and indicate the action taken

- The action/results taken should be documented in the medical record and submitted on a claim, where appropriate

- Checking the response on the CDI Alert will not close the Star gap without the claim or medical record abstraction
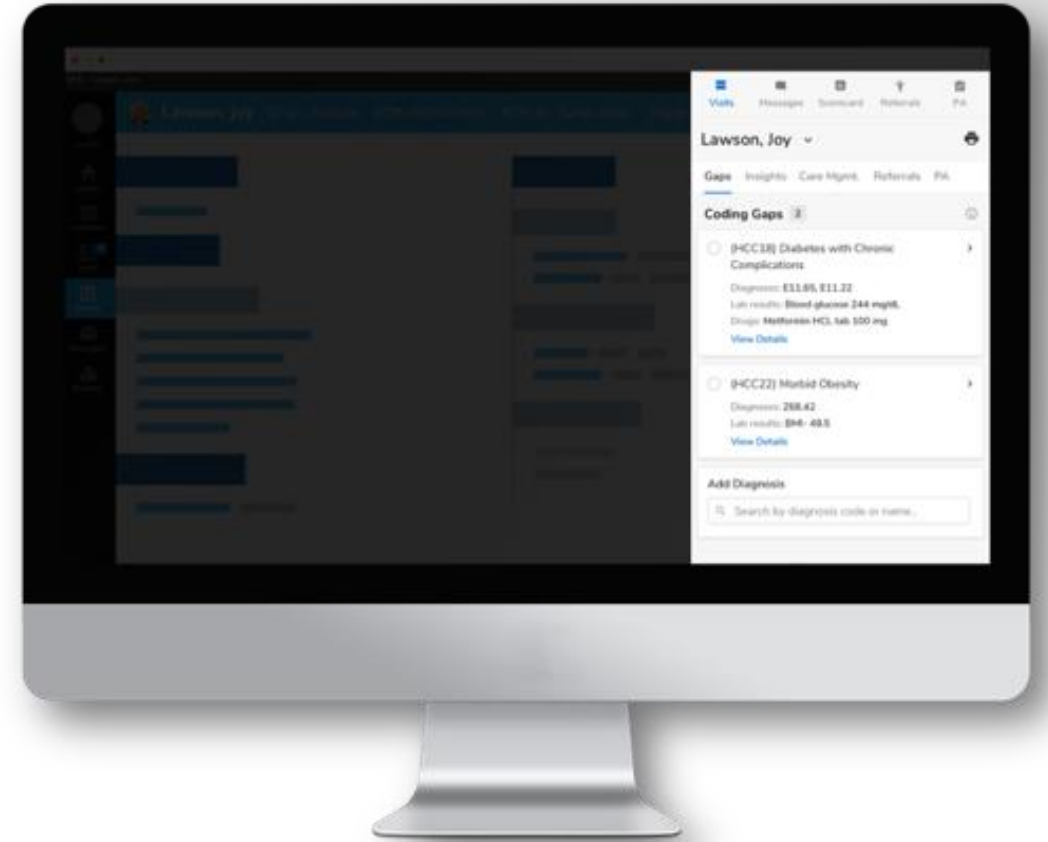
Program Effectiveness

Mature adoption of the PEC program and provider engagement strategies drives value and results. The PEC program can be implemented in **2-4 months** with full benefit realization in **24 – 36 months**.

$3,000
Average HCC Value per year

10-15%
Average lift

100%
Work performed in the US

5%
Average Stars improvement

100%
Members managed

>75%
Average CDI Alert return rate

>75%
Conditions addressed on CDI Alert

2. Integrating Risk & Quality with Symphony
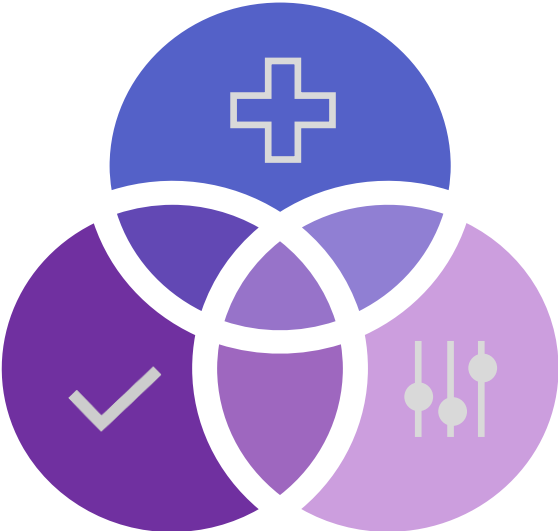
Symphony: A Cloud-Native Health Management Platform

Designed by clinicians for clinicians

Flexibility through academic workflow model architecture

Integrated workflows for UM, CM, Appeals & Grievances

Cloud-native technical architecture for scalability & agility

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Advantasure Solution Portfolio (Before)
Limitations to Integrating Risk, Quality & Health Management

Administrative Services Technology Solutions	Administrative Services Solutions	Risk Adjustment Technology Solutions	Risk Adjustment and Quality Services	Health Management Technology	Health Management Services

➢ Claims Platform
➢ Enrollment Platform
➢ Billing Platform
➢ Correspondence Module
	➢ Claims Services
	➢ Enrollment Services
	➢ Billing Services
	➢ Correspondence, Print and Fulfillment
	➢ Provider and Member Servicing
	➢ Appeals and Grievances
		➢ EDPS/RAPS Submissions
		➢ Risk Adjustment BI Reporting and Analytic Platform
			➢ Risk Adjustment Program Management
			➢ Provider Engagement Programs
			➢ Retrospective Chart Retrieval and Reviews
			➢ EDPS/RAPS Submission
			➢ RADV Audit Support
			➢ Quality Program Management
			➢ Stars Management and Improvement Program
			➢ Stars Data Abstraction
				➢ Third Party Solutions
				  ➢ Limited to no integration of Risk & Quality data
				  ➢ Limited configurability of workflows
				  ➢ Limited ability to fuse data across multiple Advantasure silos
					Care Management
					❖ Case Management
					❖ Transitions of Care to Home
					Utilization Management
					❖ Inpatient
					❖ Outpatient
					Add-On Programs
					❖ Chronic Condition Care Mgmt
					❖ ED Outreach
					❖ 24/7 Nurse Line
					❖ Health Assessments

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Advantasure Solution Portfolio (Current)
Deep Integration for Risk, Quality & Health Management

Administrative Services Technology Solutions	Administrative Services Solutions	Risk Adjustment Technology Solutions	Risk Adjustment and Quality Services	Health Management Technology	Health Management Services

➢ Claims Platform
➢ Enrollment Platform
➢ Billing Platform
➢ Correspondence Module
	➢ Claims Services
	➢ Enrollment Services
	➢ Billing Services
	➢ Correspondence, Print and Fulfillment
	➢ Provider and Member Servicing
	➢ Appeals and Grievances
		➢ EDPS/RAPS Submissions
		➢ Risk Adjustment BI Reporting and Analytic Platform
			➢ Risk Adjustment Program Management
			➢ Provider Engagement Programs
			➢ Retrospective Chart Retrieval and Reviews
			➢ EDPS/RAPS Submission
			➢ RADV Audit Support
			➢ Quality Program Management
			➢ Stars Management and Improvement Program
			➢ Stars Data Abstraction
				➢ **Symphony Health Management Platform**
				  ❖ Case and Chronic Condition Mgmt
				  ❖ Population Health Management
				  ❖ Appeals and Grievances
				  ❖ Utilization Management
				  ❖ Specialty Program Management
				➢ Configurable across multiple lines of business
					Care Management
					❖ Case Management
					❖ Transitions of Care to Home
					Utilization Management
					❖ Inpatient
					❖ Outpatient
					Add-On Programs
					❖ Chronic Condition Care Management
					❖ ED Outreach
					❖ 24/7 Nurse Line
					❖ Health Assessments

Symphony, Advantasure & the Cloud

End-to-end
Symphony is now an integrated BPaaS platform with agility and scalability to meet industry demands, HITRUST-compliant security for improved member and provider experience.

Gold Copy Libraries
Advantasure-standard workflows to support comprehensive strategies across Health Management, Quality, and Risk Adjustment.

Provider Portal
access to Provider Portal via One Health Portal (OHP) Single Sign-On with enhanced technical functionality leading to improved provider experience through more efficient processes.

Cloud-Based Innovation
Cloud-native architecture allows nimble integration of innovation from other cloud services (AI/Machine-Learning, analytics, etc.).

Centralized data
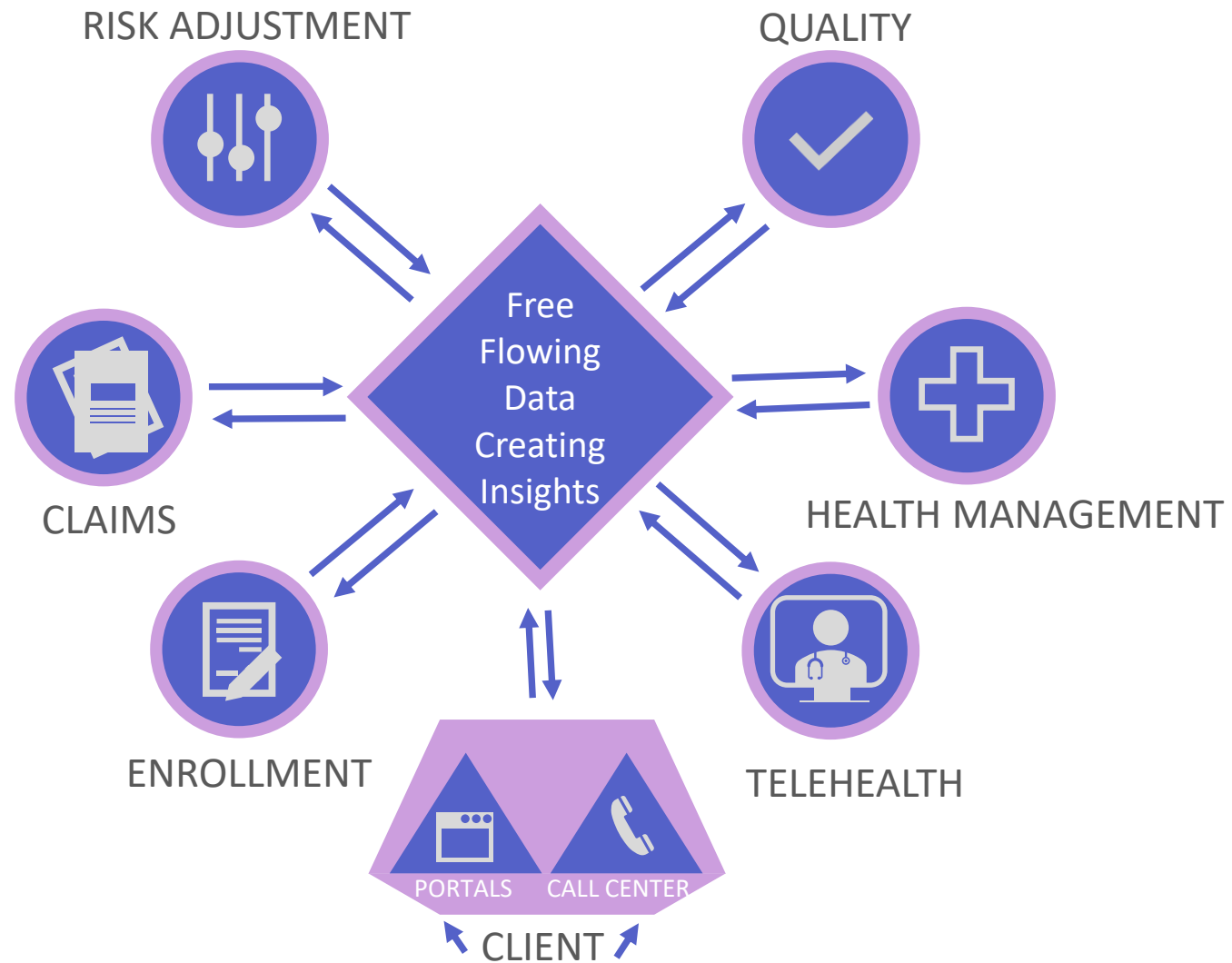
Leveraging Risk and Quality Data

Risk Adjustment & Quality Data

PROVIDER ENGAGEMENT COORDINATION (PEC) PROGRAM

Direct outreach to provider offices to close gaps

STAR INITIATIVES

Direct member outreach on gaps as part of targeted campaigns

HEALTH MANAGEMENT

Programs: Care Management, Care Transitions to Home, ED Follow-up
- HCC Risk Scores, Eligibility Flags (MMR/MOR)
- Star Gaps (HEDIS, pharmacy)
- Quality Campaigns, Provider Contacts

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Risk & Quality Integrated into Health Management
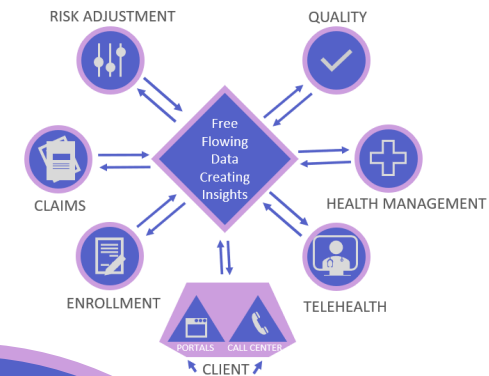
Risk Adjustment Data Sources

- Eligibility flags (MMR, MOR)
- HCC risk scores
- Provider contacts

Quality Data Sources

- Star gaps (HEDIS, pharmacy)
- Campaign participation status

Health Management Workflow

My List | My Reminders | Search | Low Risk | Mod Risk | High Risk | Recent | All

Search Symphony 🔍

				Patient ID	Last Name	First Name	DOB	Owner	Tags	CNI	CareStage	Care Gaps
☐	🟥	+1		1340397*01	KAISER	ALEX	42 (10/24/1978)	Angela Davis-Jones, RN		4	Active	COPD, Statin Therapy
☐	🟧	+13		9039600*01	GARCIA	LETICIA	67 (06/26/1953)	Chris Johnson	⭐	3	Screened	
☐	🟨	+5		6820506*01	SMITH	JOHN	65 (07/19/1955)	Chris Johnson	⭐ ⚠	3	LPN	Adult BMI Assessment
☐	🟨	+3		1108677*01	SANTIAGO	JOSE	38 (06/20/1982)	Chris Johnson	⭐ Ⓣ	5	UTR 3	Depression Screening
☐	🟩	35		1181606*01	FAGAN	PATRICK	50 (07/15/1970)	Alacia Harbaugh, LPN	⚠	2	Refused	Colorectal Cancer Screening
☐	🟩	66		1371605*01	KING JR	CALVIN	35 (12/27/1984)	Rene Roberts		2	Closed/Deferred	
☐	🟩	1		20003608*01	WHITE	VIRGINIA	95 (03/07/1925)					
☐				1328735*01	BROWN	ALEX	64 (03/06/1956)	Suzanne Collins, RN				
☐				8727325*01	RODRIGUEZ	GABRIELA	61 (09/04/1959)	Chris Johnson				
☐				3121712*01	LASHLEY	JOYCE	58 (05/25/1962)	Yvonne Jones , RN				
☐				1108214*01	WHITAKER	WILLIAM	68 (07/05/1952)					
☐				2000422*01	HERNANDEZ	MARIA	83 (06/25/1937)	Chris Johnson				
☐				S45004166*01	HARRISON	VIRGINIA	56 (08/21/1964)	Laura Franklin, RN		4	High Risk	
☐				20003820*01	ZIEGLER	JUDITH	86 (11/25/1933)	Laura Franklin, RN	Ⓒ		LPN	Cervical Cancer Screening, COPD, Diabetes - A1c

Showing 1-14 of 14

Start New Encounter
Quick Note
Letters
Edit Selected
Add Member
Settings

Dashboard view with integrated MMR, MOR, HCC, Stars Gaps, Campaign participation status

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3. To the Future: Fusing EPEC & Symphony
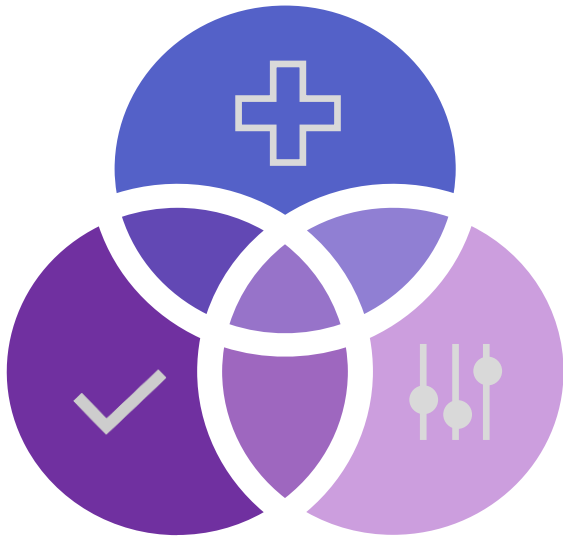
Improving Coordination between Provider & Plan

- **EPEC**
  - Capturing POC decisions and documentation about gaps in care from the provider office.

  - Integration with EMR for notification of provider office staff. (Solving problems for provider is key for adoption of this expansion)

- **Symphony**
  - Updating Care Management team with real-time care gap information from the provider office.

  - Specific programs or other resources closing care gaps (e.g. addressing SDOH) can be identified by Care Management team.

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Benefits of EPEC Care Gap Data Flowing to Health Management

Prioritize member outreach

Address open care gaps

Engage more members

Improves health outcomes and HEDIS/Stars scores

Holistic management of member; improves quality of life

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Health Management Opportunities to Help Solve Provider Problems
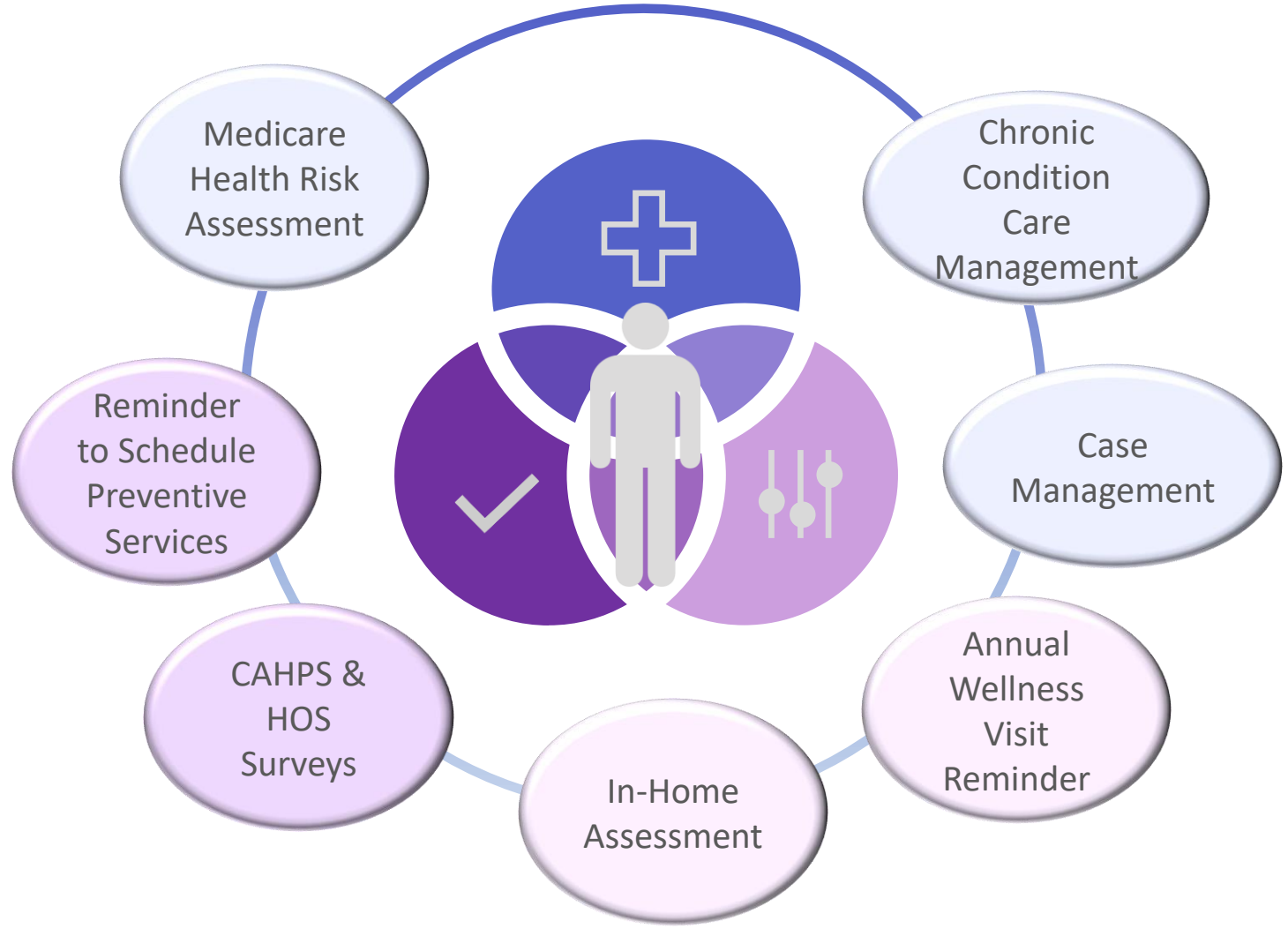
EPEC Summary Highlights

Easy implementation for provider offices

Supports improvement in risk score accuracy and Star measures

Ability to reach more members – not restricted by geography

Connectivity with EMR streamlines the PEC medical record review and delivery system

PEC Performance Manager oversees training and installation of software, reporting and ongoing support

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Risk and Quality Integration into Health Management Workflow

Technology Platform Sets the Stage

- Cloud-native health management engine

- Allows for configuration of workflows and ability to fuse data

Data Integration is Key

- Create a centralized data source

- Leverage data into actionable insights

Internal and External Benefits of Incorporating RA & Q

- Internal efficiencies gained

- Improves member health outcomes

RISK ADJUSTMENT
QUALITY
Free Flowing Data Creating Insights
CLAIMS
HEALTH MANAGEMENT
ENROLLMENT
TELEHEALTH
PORTALS
CALL CENTER
CLIENT
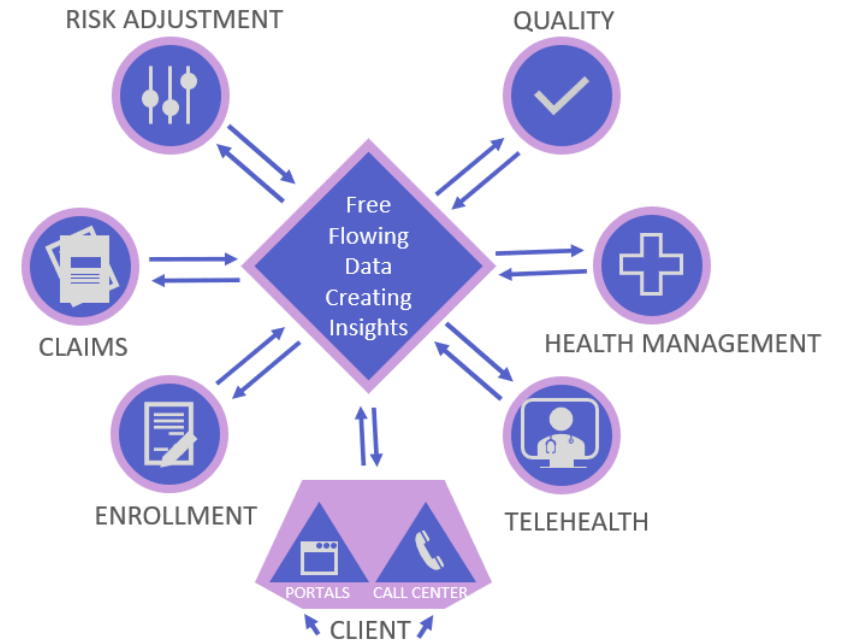
Appendix

Discussion Overview & Introductions

Discussion Overview

- Introduction and Meeting Goals

- Point of Care EMR integration

- Discussion and Next Steps

Advantasure Team

- Greg Pastor, Managing Director Risk Adjustment Operations

- Dr. Chris Johnson, Managing Director Product Management

Provider Engagement Coordination Core Programs

Electronic PEC
Electronic Record Retrieval

This feature-rich model includes electronic integration into Provider Practice EMR workflow, electronic distribution for Member CDI Alert and Query information, and electronic transaction response for Provider's completed CDI Alert and Query, as well as associated Medical Record Retrieval.

Electronic PEC
without Electronic Record Retrieval

This electronic model includes electronic integration into Provider Practice EMR workflow, electronic distribution for Member CDI Alert and Query information, and electronic transaction response for Provider's completed CDI Alert and Query. It includes post CDI Alert office visit Progress Note Review and annual Medical Record Review.

On-Site PEC

Our traditional model utilizes PEC staff to support frequent Provider Practice interaction, education, and distribution and receipt of CDI Alert information and Medical Records.

Remote PEC

This Provider Engagement model establishes relationship with Engaged Practices via print or other communication and manages distribution and receipt of CDI Alert Information and Medical Records via mail, secure fax, or other secure methods.

Electronic Gap Program

This version of the Program provides CDI Alert information to Provider Practices in an electronic format and the Provider's completed CDI Alert is returned electronically.

PEC Program Overview

Focuses on driving proven Diagnosis and Quality gap closure

The Advantasure Provider Engagement Coordination (PEC) Program delivers accurate and complete Risk Scores and Star Measure Improvement

Risk Adjustment

Drives improvement in Risk Adjustment coding by addressing Diagnosis gaps

Star Measures

Drives improvement on Star Measures by closing Star gaps

Drives provider engagement to ensure all member conditions are documented completely and accurately via Clinical Documentation Improvement (CDI) Alerts

Confirms gap closures following member appointments to **increase Risk Adjusted revenue and drive improvements in Star measures**

Outcomes include enhanced Risk Score accuracy; increased Star ratings, improved condition documentation, reduced RADV risk and better member care

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Electronic Alerts Streamline Workflows

Greater Efficiencies

Less abrasive to Providers

Easier to add into the Clinical Flow

PEC staff bring greater value with less time processing paper copies

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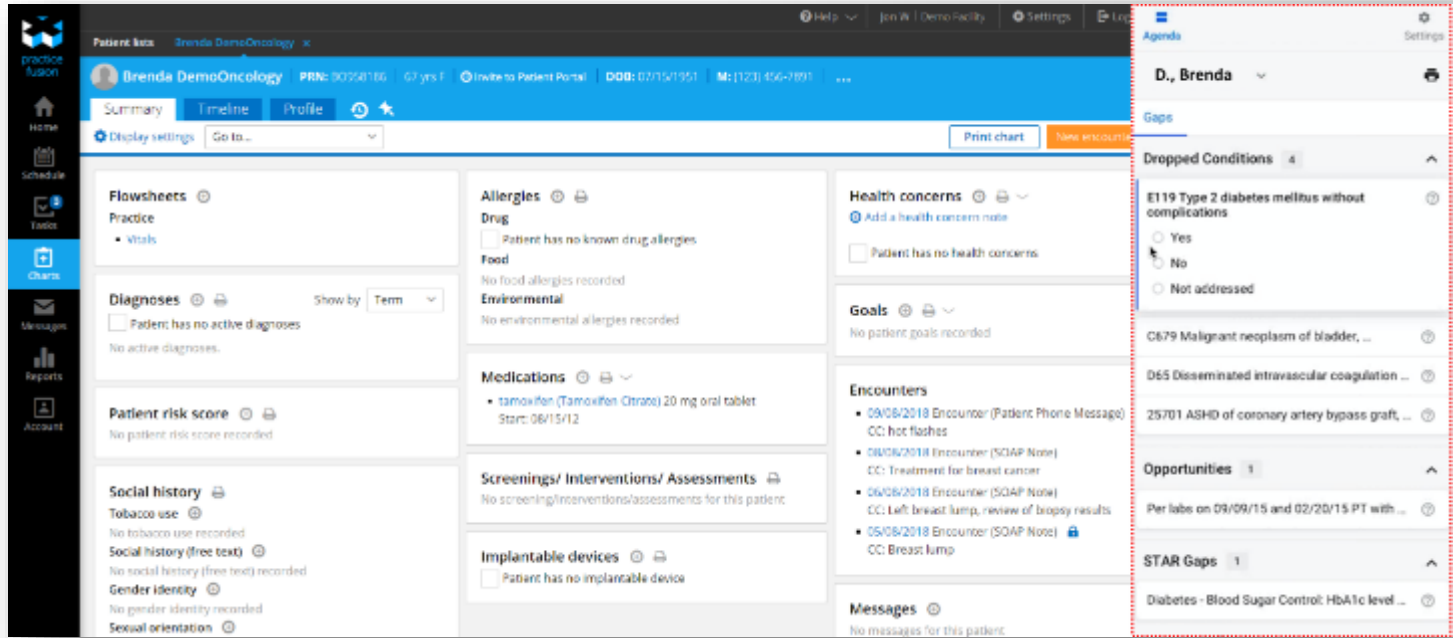
Electronic PEC Program Process Flow

CODER / PHYSICIAN REVIEW TEAM	PEC PERFORMANCE MANAGER	PROVIDER

Reviews member medical record to capture codes and identify opportunities

Generates CDI Alert with Risk and Star gaps for provider review

Delivers CDI Alert electronically for member visits

Sees member, addresses CDI Alert Risk and Star gaps, and documents in the member's medical record

Reviews CDI Alert with progress notes to capture codes and identify any queries, if necessary

Gap data returned to Advantasure via nightly sweep

Checks Yes / No for each Risk and Star gap on the CDI Alert via user interface

Delivers electronic queries

Attach medical records digitally if needed within the existing system

Creates Supplemental Diagnosis file for submission to CMS

Options for Advantasure to Access Medical Records

	Paper	EMR access limited to on-site computers	Provider uses EMR and Advantasure accesses remotely	Electronic PEC program integrates with provider EMR
Provider Practice	• Access to charts • PHI secure area to work • List of members upcoming appointments	• Sign-in access to EMR to view patient records and schedule • Workstation to access EMR • List of members upcoming appointments	• Remote access to EMR to view patient records and schedule • Access to hospital EMR through practice/hospital	• Remote access to EMR to view patient records and schedule • Access to hospital EMR through practice/hospital
Advantasure	• Pull and scan appropriate medical record • Upload to secure Advantasure server for review	• Access EMR to retrieve medical records • Copy records or print and scan them to the secure server	• Review member records through remote online access • Scan completed CDI Alerts to Advantasure secure server for review	• Retrieve medical records via EMR integration once per day
Security	Advantasure requires training and adherence to privacy and security protocols: • Mandatory HIPAA and general compliance training within 60 days of hire and on an annual basis • Employees pass background checks for convictions at the federal, state and local level • Regular sanction reviews performed on all employees against OIG, GSA, and sexual offender lists • PECs equipped with 256 AES encrypted Iron Keys for scanning records where remote access not available • Advantasure is SOC1 certified and awaiting HITRUST certification			

55% of Advantasure Providers allow remote EMR access with the following benefits:

- Less intrusion in the clinic
- Reduced workload for office staff
- Timely reviews and fewer queries
- No follow-up requests for additional information
- The entire record is available for the annual medical record review
- No printing limitations imposed by some EMRs

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Implementation and Training

Hit the ground running with fast, easy, and streamlined implementation and training

1 **One-Time Set Up**
1 – 2 hour, one-time set up with our deployment team

2 **Computer Set Up**
30-minute installation time per computer

3 Multiple options for provider education

In-Person Trainings

Live Streaming Webinars

Training workshops

Walkthrough sessions

Hands-on demo sessions

Online training for representatives

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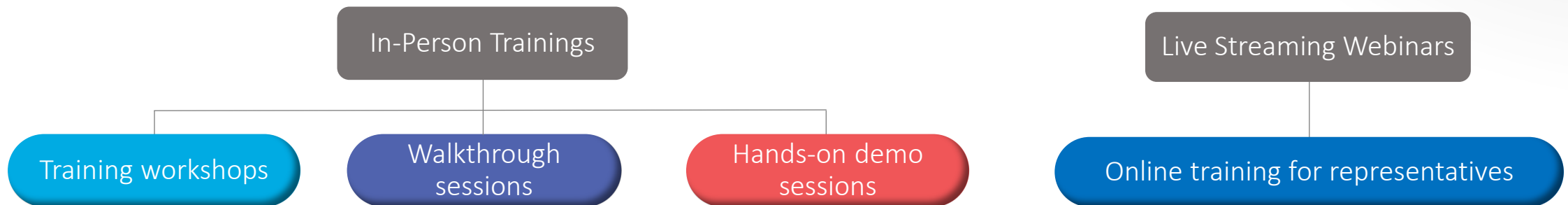
Driving Proven Diagnosis and Quality Gap Closure

PEC Program capabilities offer **efficient, automated workflows and delivery cycles** (i.e. view, close and transmit gaps < 24 hours) with **proven results** in Risk Adjustment and Star Measure improvements

Enhanced Risk Score accuracy: 10-15 % average lift from Program

Support improved Star ratings: 5% average improvement

Better clinical documentation

Lowered RADV risk

Improved member care

PEC Program Results

Estimated Condition Accuracy Improvement ($M)
10,000 Members Engaged*

		$6.3
	$7.3	
$5.8		
Program year 1	Program year 2	Program year 3
2.7 ROI	3.5 ROI	3.0 ROI
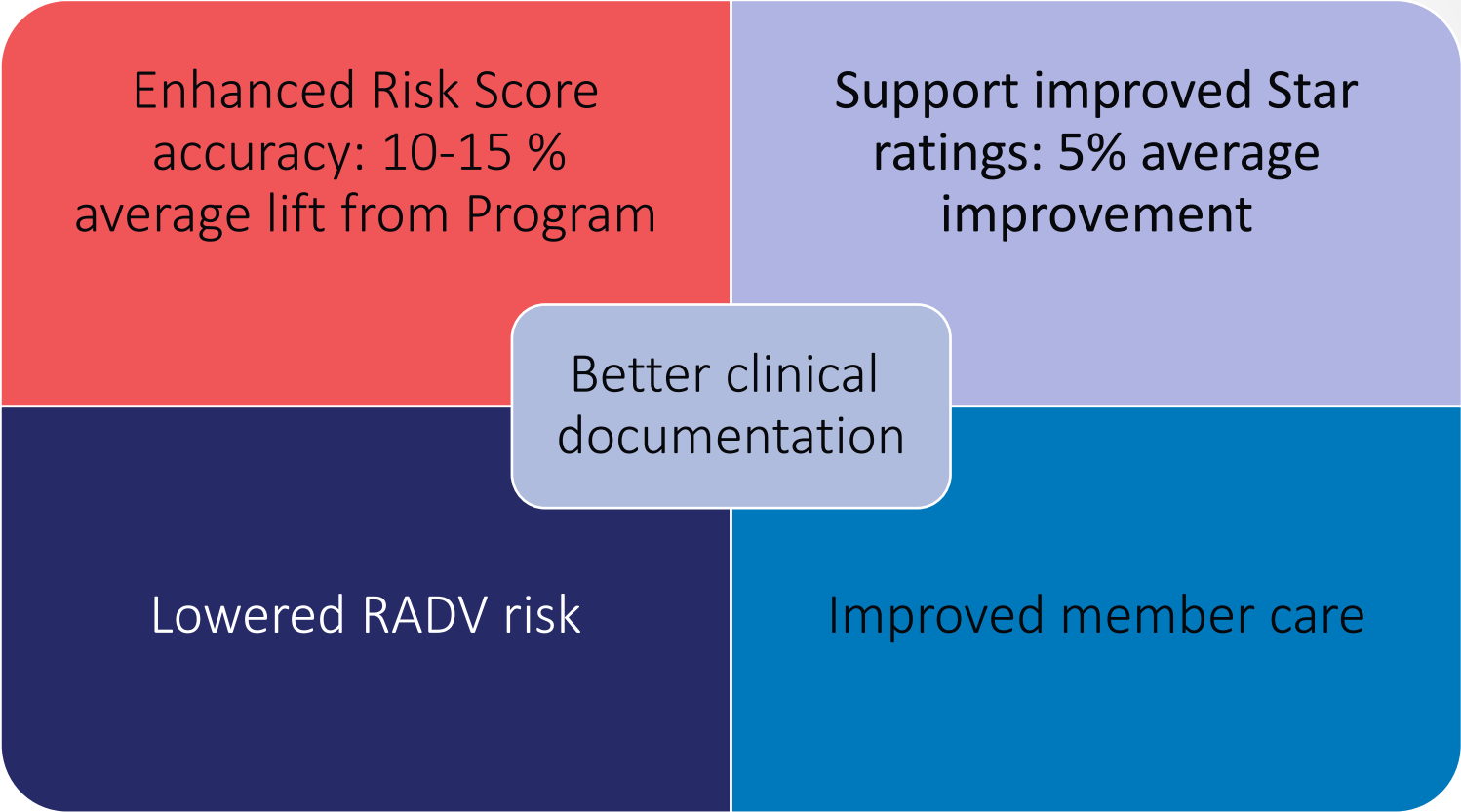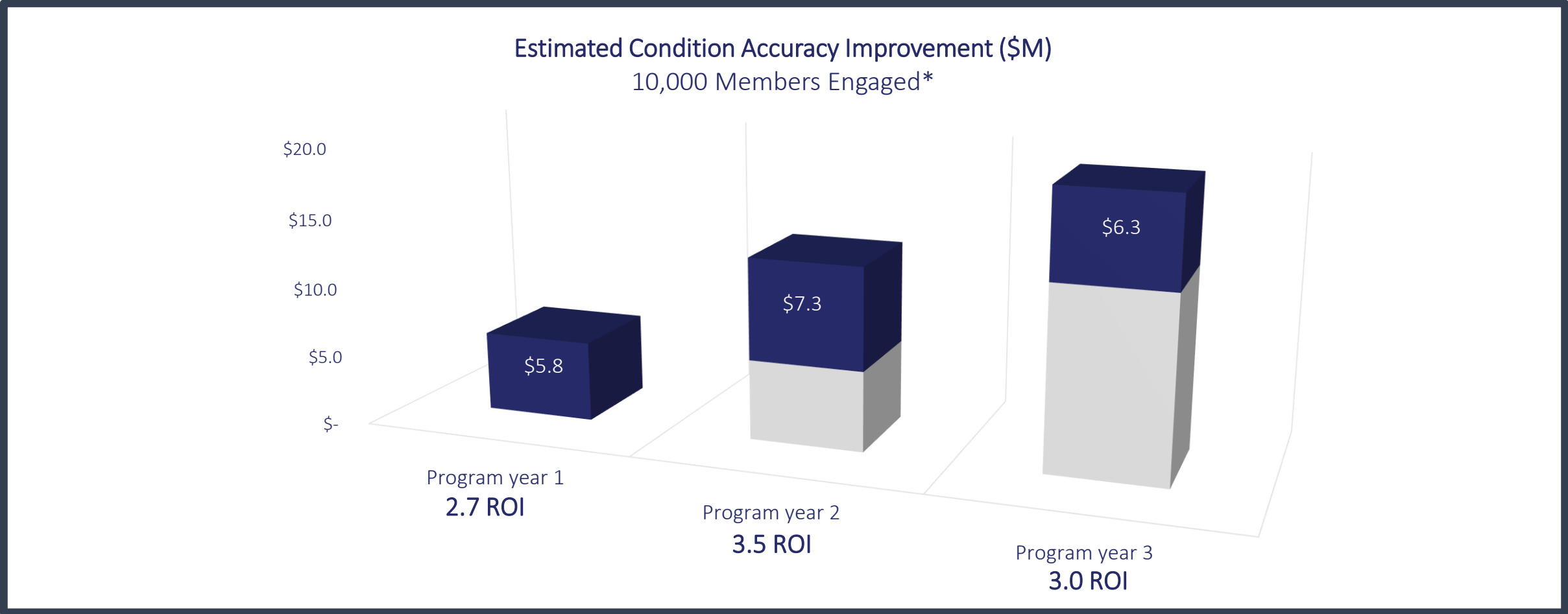
*Includes revenue where Advantasure was the only source

*ROI revenue related to retrospective and prospective reviews in each of the 3 program years

*Year 2 - ROI increases comparatively to Year 1 due to current codes being captured from opportunities and the shift in more codes being captured from prospective vs retrospective.

*Year 3 - ROI decreases comparatively to Year 2 due to provider education; with better documentation and coding, more diagnoses can come through claims vs reviews.

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Content Slides – for main content

Presentation Best Practices:

- Try to keep all bullet points concise, easy to read, and maintain this grey color.

- Use the font "Calibri" as your body text

- Keep all font sizes above 20, but the standard font size for a bullet is 28 point.
  - Any sub-bullets may be added as needed and minimum font size is 16.

- Do not use colors such as Bright red, Bright yellow, or anything too light to read on the given background

Section Slide – Use to visually transition from one section of your presentation to the next

- If adding imagery, double check the following:

- make sure there is no overlapping text

- the photo is good quality/not pixelated

- The image is not crowded on the slide

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