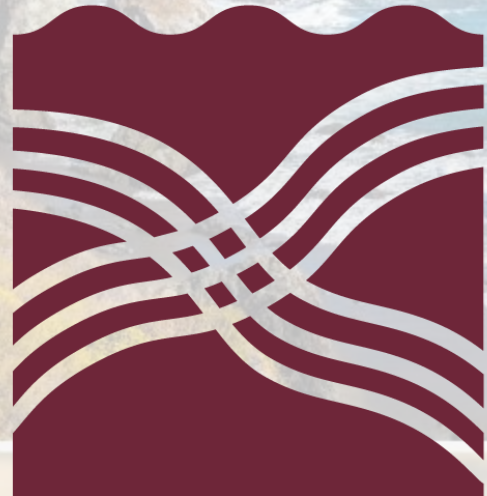


PARTNERSHIP



HEALTHPLAN

of CALIFORNIA

A Public Agency



HEDIS Measurement Year 2025
Reporting Year 2026
Medical Record Retrieval Webinar

Partnership HEDIS Team
October 16, 2025



Welcome

Thank you all for joining our Webex meeting!

Today's webinar will be recorded, so you have been muted upon entry.

The meeting will begin shortly.



Welcome

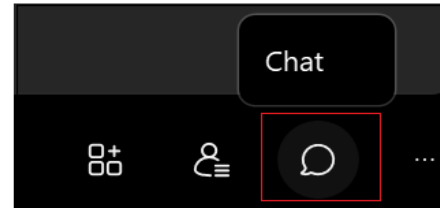
How to mute yourself

To mute or unmute yourself, select **Mute**  or **Unmute** .

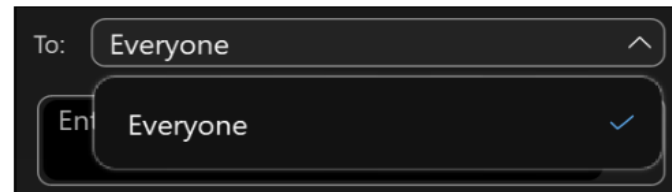
How to utilize chat feature

To send a chat message:

- 1 Open the Chat panel from the link in the lower right of the meeting window:



- 2 In the **To** drop-down list, select the recipient of the message.

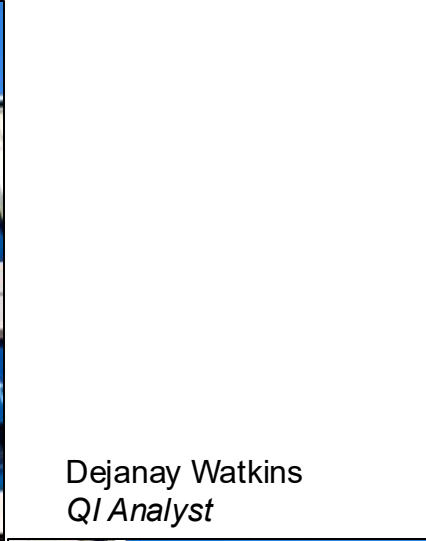


- 3 Enter your message in the chat text box, then press **Enter** on your keyboard.

HEDIS Team



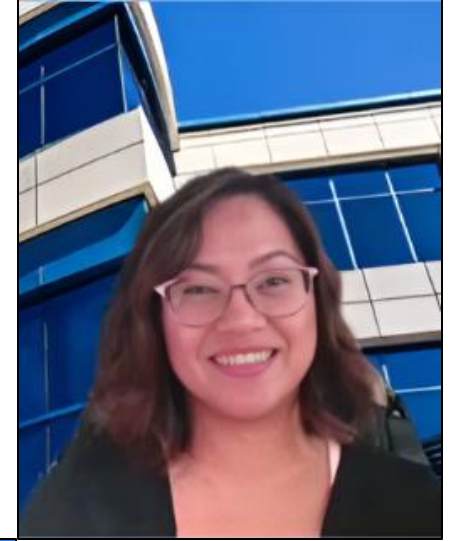
Sue Quichocho
*Manager of Quality
Measurement*



Dejanay Watkins
QI Analyst



Lola Powell
Senior QI Analyst



Jordan Sumodobila,
Pharm D.
Clinical Lead



Martha Layne, RN
*Supervisor of HEDIS
Clinical*



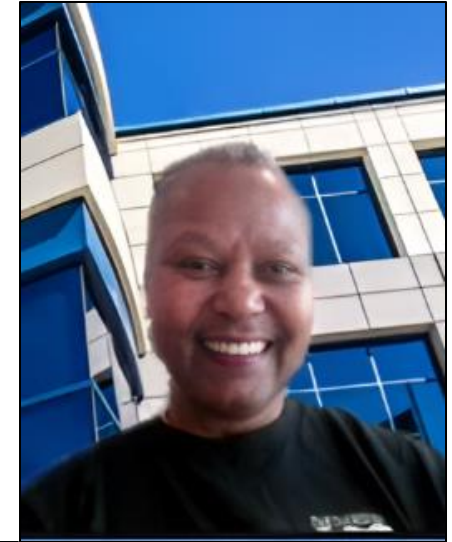
HEDIS Team



Cheyenne Gaines
Program Coordinator II



Michael Langley
Program Manager I



Cassandra Chambers
Program Manager I

Yadira Reynoso
Program Coordinator II



Tegan Spencer
QI Analyst



Agenda

- Overview of HEDIS and medical record review
- Medical record retrieval options
- Partnership retrieval
- KDJ EMR remote retrieval
- Roles and responsibilities
- HEDIS timeline
- Resources and contacts

HEDIS Overview

HEDIS stands for:

- Healthcare Effectiveness Data and Information Set

Why does HEDIS exist?

- HEDIS is a measurement tool maintained by the National Committee for Quality Assurance (NCQA).
- HEDIS is used to evaluate clinical quality in a standardized way.
- The California Department of Healthcare Services (DHCS) and NCQA selects a subset of measures for Medi-Cal plans to report on annually as required for State and NCQA Accreditation reporting.
- DHCS and NCQA uses annual HEDIS performance reporting to evaluate the delivery of quality care and services to its members.

Reporting Populations

DHCS and HPA Reporting Population

Partnership Counties

Butte, Colusa, Del Norte, Glenn, Humboldt,
 Lake, Lassen, Marin, Mendocino, Modoc,
 Napa, Nevada, Placer, Plumas,
 Shasta, Sierra, Siskiyou,
 Solano, Sonoma, Sutter,
 Tehama, Trinity, Yolo, and Yuba counties.

All 24 counties – reported rates



Measurement Year versus Reporting Year

- Measurement Year (MY) – The previous calendar year, but could include a longer look-back period depending on the measure specifications.
- Reporting Year (RY) – The year the data is collected and reported to DHCS and NCQA.

Hybrid versus Administrative Measures

- Administrative Measures
 - Measures the entire population
 - Data is collected through transaction data or other administrative data used to identify the eligible population and numerator (i.e. claims/encounter data).
- Hybrid Measures
 - Measures a statistically significant *sample* of the eligible population.
 - Data collected from transaction data or other administrative data and key data elements are collected from the medical record chart.

Hybrid Measures

BPD**

- Blood Pressure Control (<140/90) for Patients with Diabetes

CBP

- Controlling High Blood Pressure

GSD

- Glycemic Status Assessment for Patients with Diabetes

LSC*

- Lead Screening in Children

PPC Pre & Post

- Timeliness of Prenatal Care
- Postpartum Care

WCC**

- BMI Percentile

**Indicates HPA reporting only

* Indicates MCAS reporting only




Medical Record Retrieval





Requested Documentation

		MY2025/Ry2026 HEDIS® Study
Date Faxed: 10/30/25 From: Cassandra Chambers Call Back #: 707-419-7912	Contact Name: Medical Records Provider Address: 123 Main St, Anywhere, CA Provider Fax: 555-999-1234	
Additional Comments: Per our conversation, please submit medical records by 11/12/25 via ShareFile.		



HEDIS® MY2025 - Member List

Member Name	DOB	Measure	Chase ID	PPC Delivery Date	If no record available, please note reason here.
Member 1	xx/xx/xx	CBP	123456		
Member 1	xx/xx/xx	PPC	123457		
Member 2	xx/xx/xx	BPD	123458		
Member 2	xx/xx/xx	LSC	123459		
Member 3	xx/xx/xx	CBP	123460		
Member 3	xx/xx/xx	WCC	123461		

Each member in the sample can be in more than one measure. Each member/measure combination is assigned a unique Chase ID

Blood Pressure Control for Patients with Diabetes (BPD)¹

The percentage of patients 18-75 years of age with diabetes (type 1 or 2) who had the following indicator during the measurement year: BP Control <140/90

- ★ 1. **Confirm that the patients' names and dates of birth match the charts.** ★
2. **Documentation Required:**
 - All blood pressure readings in 2025 on or before 12/31/2025. Include progress notes (including both telehealth and in-person office visits) and vital signs flow sheet, if available.
 - If no blood pressure found, all 2025 visit notes (including both telehealth and in-person office visits) and vital signs flow sheet.
3. **If any of the following criteria apply, please provide supporting documentation (i.e., problem list, medical history, medication list, and all visit notes for 2024 & 2025):**
 - Patient received hospice or palliative care services anytime during 2025
 - Patient died anytime during 2025
 - Patient does not have diabetes
- ★ 4. **If the requested documentation is unavailable, indicate the reason(s) below:** ★
 - Patient never seen here
 - Unable to retrieve patient chart from remote storage
 - No office visits during pertinent time frame. Patient last seen on _____
- ★ 5. **Please send the following documents to Partnership:** ★
 - This instruction sheet
 - **The patient's demographics page with at least 3 identifiers [i.e., (1) Name, (2) DOB, (3) CIN/Medi-Cal Number, Address, or Phone Number]**
 - The requested chart copies (with patient name clearly shown on each page)



Types of Retrieval

- Remote Collection
 - Records collected electronically from Provider EMR (Electronic Medical Record)
 - KDJ Consultants
- Partnership Collected
 - Partnership staff will reach out to your office requesting specific member records
 - ShareFile sFTP
 - Fax
 - **Do Not Mail Records!**
- Market Collected
 - Third-party vendor who collects records from the provider office.

Do Not Mail



Remote Collection KDJ Consultants Inc.

Contracted with
Partnership to
perform remote
retrieval

Partnership and
KDJ are
partnering for a
9th HEDIS
project

Certified
Women-Owned
Business
(WBE) and
SOC 2SM
Certified
Corporation

Established in
1995 and have
been
conducting
HEDIS retrieval
since 1997



KDJ Responsibilities

- First point of contact for EMR Remote Retrieval and coordination of remote access testing.
- Provides a list of member's charts they need to access. (If the member chart is not available, please notify KDJ immediately.)
- Assigned nurse logs into EMR to review specified charts to collect HEDIS data.
- Copies only medical record data to support abstraction made accessible to Partnership.

Partnership Retrieval

Outreach and Scheduling Provider Method:

1. Partnership staff will outreach to identify appropriate retrieval method and establish a commitment date.

2. Partnership Staff will send the Provider Package via one of the following means:

- ShareFile (email link to provider)
- Fax or Secure Email

3. Providers will submit medical record documentation using the agreed upon timeline and method:

- ShareFile – Upload records directly
- Fax – Fax to Partnership's HEDIS Fax line

- Secure sFTP server owned by Partnership
- Email address is required
- Only those with permission can view/edit the folder
- Visit our HEDIS page: “Learn More about HEDIS Medical Record Retrieval” to find the ShareFile tutorial.

Provider Method Retrieval



For HEDIS MY2023, Partnership staff will request medical records from provider offices to be submitted via ShareFile or fax.
[Click here to view ShareFile for Providers](#)
[Click here to view ShareFile Tutorial](#)

ShareFile Example

Megan Shelton has shared the folder 'HEDIS RY23MY22' with you. - Message (HTML)

File Message Acrobat Tell me what you want to do...

Ignore X Delete Reply Reply Forward Meeting IM+ Create a task with... New Meeting New Message Create New

Rules+ OneNote Mark Unread Categorize Follow Up Translate Related Select Zoom

Move Actions

Deliver Deleted Responder Quick Steps

Fr 2/13/2023 10:15 AM

mail@sf-notifications.com

Megan Shelton has shared the folder 'HEDIS RY23MY22' with you.

To: Megan Shelton

1 If there are problems with how this message is displayed, click here to view it in a web browser.

PARTNERSHIP
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of CALIFORNIA

Megan Shelton has shared the folder **HEDIS RY23MY22** with you.

Note From Megan:

I've added you to a folder

> [Click here to view this folder](#)

ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail.

Trouble with the above link? You can copy and paste the following URL into your web browser.
<https://partnershipphp.sharefile.com/ff0a3649f-4a4a-4f9d-97e7-46873d81e98>

Powered by Megan Shelton on 2/13/2023

1 [Click here to activate your account and view this folder](#)

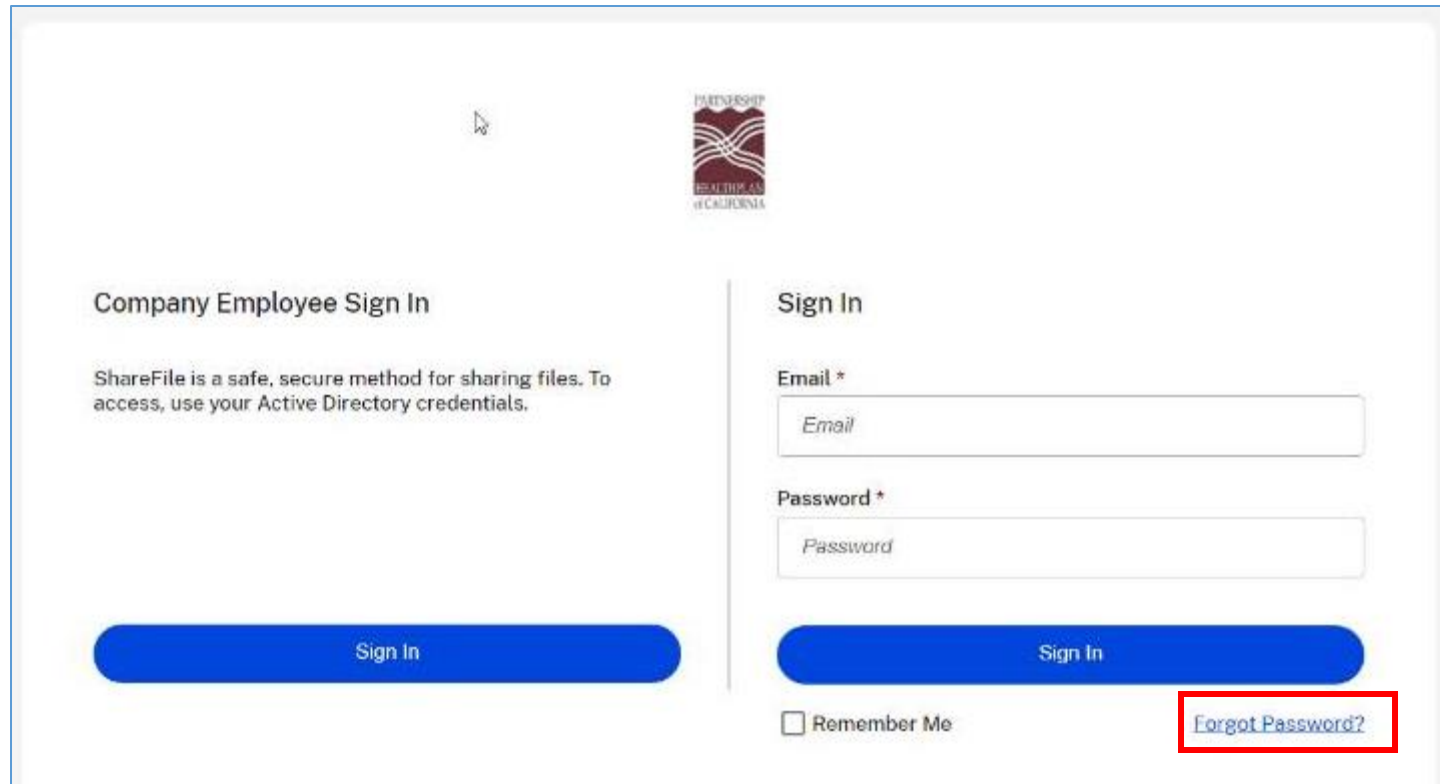
Desktop 7:35 PM 7/11/2023

- 1) Email will come from mail@sf-notifications.com
- 2) Subject line will say (Partnership staff name will appear here) has shared the folder (your clinic name here) with you.
- 3) In the body of the email, it will repeat what is in the subject line
- 4) Select "Click here to view this folder" or use the link provided farther down.

[Click here to activate your account and view this folder](#)

ShareFile Example

- Clicking the link will open a web browser and take you to a login screen.
- If it is your first time using ShareFile, click Forgot Password to establish your login details



The screenshot shows a login interface with two columns. The left column is titled "Company Employee Sign In" and contains the text: "ShareFile is a safe, secure method for sharing files. To access, use your Active Directory credentials." Below this is a blue "Sign In" button. The right column is titled "Sign In" and contains two input fields: "Email *" and "Password *". Below these fields is a blue "Sign In" button. At the bottom of the right column, there is a checkbox labeled "Remember Me" and a link labeled "Forgot Password?". The "Forgot Password?" link is highlighted with a red rectangular box.

ShareFile Example

- After logging in, you will see the folder created for your office and the Provider Package that contains the information on which charts we need to collect.

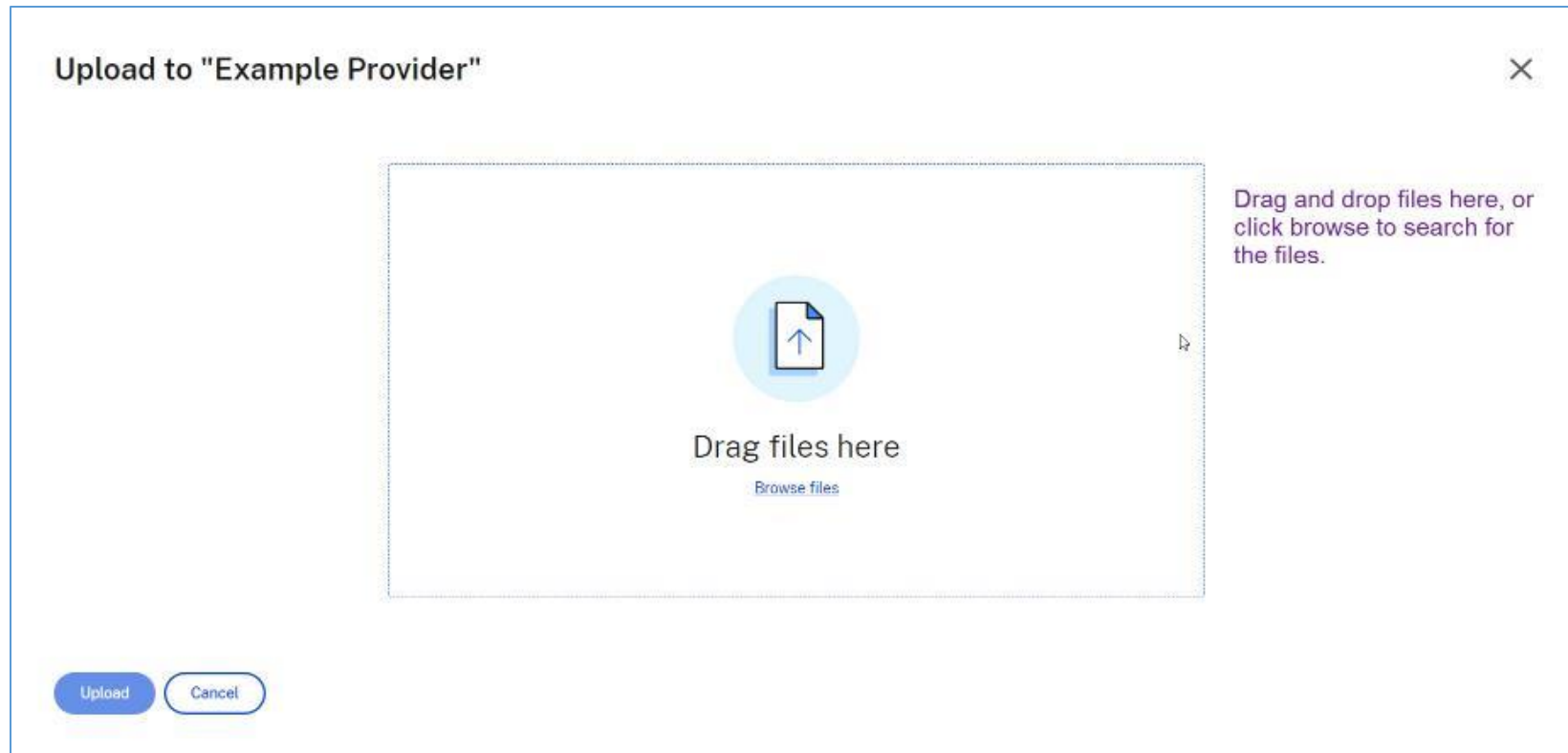
The screenshot displays the ShareFile web interface. At the top, there is a search bar labeled 'Search files and folders' and navigation links for 'Help', 'Apps', and 'Log Out'. The left sidebar contains a navigation menu with options: Dashboard, Folders, Personal Folders, Shared Folders, Favorites, File Box, Recycle Bin, Workflows, Inbox, People, and Settings. The main content area shows a breadcrumb trail: 'Shared folders > FIELDS HY23 MY22 > Megan's Providers > Example Provider'. Below this, a folder icon is labeled 'Example Provider' with a 'More Options' menu. Underneath, there are tabs for 'Items' and 'People'. A table lists the contents of the folder:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Example Provider_Provider Package.pdf	2 MB	2:23PM	T. Spencer	

Below the table, there is a notification setting: 'Email me when a file is: Downloaded from this folder Uploaded to this folder'. A blue plus sign icon is visible in the top right of the main content area. The bottom right corner of the interface features a blue circular icon with a white 'S'.

ShareFile Example

- Select Upload from the menu that appears and the screen will prompt you as follows



Partnership Retrieval

ShareFile sFTP (preferred)

- Secure file sharing, direct upload of records.
- Enables real time view of records submitted for validation
- Reduces re-requests due to illegible records, failed faxes
- Recommended for submitting electronic records (PDF)

Fax

- Limited to providers unable to use ShareFile

Roles and Responsibilities



HEDIS Team Responsibilities

Partnership's HEDIS team responsibilities include:

- Partnering with providers to select the best retrieval method and establish a due date.
- Follow-up with providers, as needed, for any retrieval or scheduling requests.
- Support providers and KDJ to successfully retrieve medical records timely.
- Intervene and provide support to resolve any challenges if any arise.

Provider Responsibilities

- Respond timely to Partnership and KDJ outreach calls/emails or technical issues.
- Submit requested records to Partnership by the agreed upon date for provider method.
 - Note any members whose chart is not available.
 - Follow up calls are made to providers if records are not received by agreed upon date.
- Inform Partnership of any delays or issues as they occur.



Year-Round Medical Record Retrieval Begins – Oct. 2025

- Beginning in Oct. 2025, Partnership will begin conducting a year-round medical record retrieval project. Traditional HEDIS Medical Record Review (MRR) for hybrid measures is performed annually, typically January to May.
- Year-round HEDIS MRR has become increasingly important for health plans such as Partnership to identify earlier measure performance improvement opportunities. This involves continuously collecting and reviewing medical records throughout the year in lieu of relying solely on retrospective annual reviews to improve HEDIS reporting rates.
- Year-round MRR can improve HEDIS rates which reduces the risk of financial penalties including DHCS withholdings for specific quality measures.





Timeline



HEDIS YRMRR MY2025 Timeline

Oct. 2025
to
Jan. 2026

- YRMRR this year will include: W30, PPC-Pre, and WCC-BMI
- KDJ will outreach for EMR Remote access set-up and/or testing
- Partnership and KDJ will send out Provider Packages



HEDIS Annual MY2025 Timeline

Beginning in Dec. 2025

Dec

- Dec. 27, 2025, deadline for EMR remote access forms.
- KDJ outreach for EMR remote access set-up and/or testing ends.

Jan

- KDJ Outreach for EMR remote access set-up and/or testing ends.

Feb

- Partnership and KDJ start sending out provider packages.
- Primary medical record retrieval and abstraction begins.

Apr

- Primary medical record retrieval and abstraction begins.
- Secondary medical record retrieval begins.

May

- Secondary medical record retrieval begins.
- May 1, 2026, All retrieval and review stops for medical records review audit (MRRV).

Jun

- Final rates locked and reported to NCQA and DHCS.
- June 12, 2026, KDJ will deactivate credentials from provider EMR.

Sept

- HEDIS MY2025/RV2026 Annual Summary of Performance a shared with our provider network.



Resources

Partnership HEDIS Website

- <http://www.partnershiphp.org/Providers/Quality/Pages/HEDISLandingPage.aspx>
- Medi-Cal HEDIS MY2024 Performance
- HEDIS FAQs
- Technical Guideline for Remote Access
- HEDIS Newsletter
- Measure definitions and documentation requirements

NCQA Website

- <http://www.ncqa.org/HEDISQualityMeasurement.aspx>



Contact Us

Partnership HEDIS Team

- Phone: (866) 828-2302
- Fax: (707) 863-4314
- Email:
HEDISMRA@partnershiphp.org

KDJ Provider Support Line:

- Phone: (817) 329-1397



Questions

