MCO Attribution Report:

User Guide

Last Updated: October 2022
Table of Contents

1. **Introduction to the MCO Attribution Report** ........................................................................................................... 3
   1.1. What is the MCO Attribution Report? .................................................................................................................. 3
   1.2. What is included in the MCO Attribution Report? ............................................................................................... 3
   1.3. Report Specifications ............................................................................................................................................... 3
   1.3.1. *Data Sources* ................................................................................................................................................ 3
   1.3.2. *Data Timeliness* ........................................................................................................................................... 4
   1.4. Email Alerts Options ............................................................................................................................................. 4

2. **Getting Started** ......................................................................................................................................................... 5
   2.1. Requesting a User Account .................................................................................................................................. 5
   2.2. Logging into Power BI ........................................................................................................................................... 5
   2.3. Ongoing Security Requirements .......................................................................................................................... 5

3. **Review of the MCO Attribution Report Contents** .................................................................................................. 6
   3.1. Attributed Summary .............................................................................................................................................. 6
   3.1.1. *Trends Over Time: In-Depth* .......................................................................................................................... 7
   3.2. Non-Attributed Summary ..................................................................................................................................... 7
   3.2.1. *Non-Attributed Patients by PATH Organizations In-Depth* ........................................................................... 8
   3.3. Patient Detail .......................................................................................................................................................... 8
   3.3.1. *Quick Filters In-Depth* ................................................................................................................................... 9

Common User Functions and Tasks .................................................................................................................................. 10

4. Export a patient list or other report contents ............................................................................................................. 10
   4.1. How to evaluate your overall performance on attributed patient engagement ..................................................... 10
   4.2. How to view the distribution of your attributed patients across providers ......................................................... 11
   4.3. Use the Patient Detail page to identify my attributed patients who have an MRN at my org but are overdue for a visit 12
   4.4. Use the Patient Detail page to identify my attributed patients who haven’t yet established care ......................... 12
   4.5. Use the Patient Detail page to identify patients who have an MRN at your org but are attributed to another provider so you can try to move them to your panel ........................................................................... 12
   4.6. How to identify your attributed patients with a recent hospital encounter ........................................................ 13

5. **Troubleshooting** ......................................................................................................................................................... 14
   5.1. I forgot my password .............................................................................................................................................. 14
   5.2. My verification or authentication failed/did not work ............................................................................................ 14
   5.3. I don’t see my report in Workspaces .................................................................................................................... 14
   5.4. My report is not updated or does not show updated information ................................................................. 14

6. **Contact Us** ............................................................................................................................................................... 14
1. Introduction to the MCO Attribution Report

1.1. What is the MCO Attribution Report?

The MCO Attribution Report is a tool to help primary care organizations identify and manage the patients who are attributed to them by the Medicaid managed care organizations (MCOs). The report includes data on two types of MCO patients: (1) patients who are attributed to your organization and (2) patients who have an MRN at your organization but are attributed to another Medicaid provider.

Members can use the MCO Attribution Report to:
- Reach out to patients who are attributed to you, but haven’t yet established care with your organization
- Request changes to your attribution panel based on where patients are receiving care (i.e., for patients who are attributed to your organization, but are receiving care elsewhere and vice versa)
- Optimize your quality and care gap measure performance by having a better understanding of your attributed patients

1.2. What is included in the MCO Attribution Report?

The MCO Attribution Report has been optimized to streamline data presentation for all use cases and clinical capacities. The report includes four pages: (1) Attributed Summary, (2) Non-Attributed Summary, (3) Patient Detail, and (4) About This Report page.

For details on the report contents, see section 3 of this user guide.

1.3. Report Specifications

1.3.1. Data Sources

The data in the MCO Attribution Report comes from three primary sources: Medicaid MCO data, patient data from PATH clinics, and provider NPI data.

Medicaid MCO data: PATH receives all Medicaid eligibility, plan enrollment, and provider attribution data for the 5 MCOs. Gainwell Technologies (the Louisiana Department of Health’s data aggregator vendor) sends the eligibility and enrollment data to PATH on a monthly basis and the attribution data on a weekly basis. PATH matches the MCO
attrition data against the provider NPI lists submitted by PATH clinics in order to identify all patients who are attributed to all providers each organization.

Clinic patient data: PATH receives data (i.e., EHR feeds, patient lists) from our clinic members. The report displays patient MRN and visit history data from primary care clinics that have Medicaid attribution panels and have submitted a provider roster to PATH. Please refer to the “About this report” page of the MCO Attribution Report to view the full list of clinics contributing data.

Provider NPI data: PATH uses both individual-level and group-level NPI data (i.e., type 1 and type 2 NPIs) to link the MCO attribution data to the NPIs associated with each member organization. This allows us to identify all patients attributed all providers at each organization. Clinics submit individual-level provider NPI lists to PATH, which should be updated quarterly or as needed. To obtain group-level NPIs, PATH has developed an automated process to pull each member’s group-level NPIs from the national NPI registry website based on organization name.

1.3.2. Data Timeliness
The MCO Attribution Report data is automatically updated weekly on Wednesday or Thursday of each week. The updated report data reflects the current attribution data, meaning that newly attributed patients have been added to the report and patients who are no longer attributed (due to provider reassignment, plan disenrollment, or change in eligibility) have been removed from the report. Since the weekly update process is dependent on when Gainwell (LDH’s data aggregator vendor) sends the weekly attribution file to PATH, users may experience some variation in the report update frequency. The PATH team will notify users in advance of planned maintenance that may impact the MCO Attribution Report.

1.4. Email Alerts Options
When new data has been added to the report, PATH can send an automated email alert to users to notify them to check the MCO Attribution Report. Individuals can select email alert preferences in the User Account Request Form based on the organization’s operational flow and data needs. Email alert options are described below.

<table>
<thead>
<tr>
<th>Email Alert Option</th>
<th>Trigger Event for Email Alert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send me a weekly email alert when the report is refreshed with new data</td>
<td>Report refresh process, which is expected weekly on Wednesday or Thursday mornings</td>
</tr>
<tr>
<td>No email alerts at all</td>
<td>N/A</td>
</tr>
</tbody>
</table>

A sample email alert is pictured below:

![Email Alert](image)
2. Getting Started

2.1. Requesting a User Account

The MCO Attribution Report is built using Microsoft Power BI. To access the report, members will need a Power BI user account, which the PATH team will create and manage. Each member organization is permitted up to 6 user accounts. Due to the cost of the Power BI license per user, PATH cannot accommodate more than 6 users per organization at this time. An annual licensing fee of $96 per additional user is required for more than 6 users.

To request a user account, please complete the PATH User Request Form by following the hyperlink. Depending on user permissions determined by your organization, users can access other PATH report products through their Power BI user account in addition to the MCO Attribution Report.

2.2. Logging into Power BI

A user guide to get you started on the login process can be found through our Power BI Quick User Guide (with accompanying video).

2.3. Ongoing Security Requirements

The PATH team has several ongoing security measures and requirements, described below, to ensure the privacy and security of protected health information contained in the reports.

- **Two-Factor Authentication:** All users will be required to set up two-factor authentication upon logging in for the first time. This will prompt users to verify their identity every 7 days or whenever logging in on a new device.
- **Password Update Every 90 Days:** All users will be required to update their password every 90 days. When your password is about to expire, you will receive an email from Microsoft informing you of the expiration date and prompting you to update your password.
- **Notify PATH within 7 Days of User Transitions:** Member organizations should promptly inform the PATH team if a user is leaving your organization or transitioning to a different role that does not require access to reports. In accordance with the PATH user access control policy, members must notify the PATH team within 7 business days of a user’s employment or contract ending. The PATH team will promptly deactivate the user account to prevent unnecessary or unauthorized access to reports.
3. Review of the MCO Attribution Report Contents

The MCO Attribution Report contains three pages: (1) Attributed Summary, (2) Non-Attributed Summary, and (3) Patient Detail. The sections below provide an overview of each page. The images and blue comment boxes below describe the charts and other contents on each page of the Report. The numbers associated to each comment box represent the recommended order for reviewing the information to help you get oriented to the Report contents.

3.1. Attributed Summary

This page displays summary data on the patients attributed to your organization.
3.1.1. Trends Over Time: In-Depth
The patient trends are represented by the line graphs that indicate how many of your attributed patients have established care or had a recent visit at your organization (light blue), other PATH organizations (dark blue), or not at all (orange). The intended goal is to grow the light blue values and reduce the dark blue and orange values over time. Using the data trends can indicate the performance of bringing attributed patients into care or reattributing patients to or from your panel.

3.2. Non-Attributed Summary
This page displays summary data on patients who have an MRN at your organization but are attributed to another Medicaid provider.
3.2.1. Non-Attributed Patients by PATH Organizations In-Depth

This table can be used to identify patients who have an MRN or recent visit at your organization, but are attributed to another PATH organization. See the illustration below for more guidance on how this information can be used to help ensure that your active patients are re-attributed to your panel.

High numbers of your patients are attributed to other PATH orgs. However, not all patients with MRN at your org have an active care relationship with you. To take this information to the next level, identify your active patients who you believe should be attributed to your org.

These patients had an encounter at your org in the past year, but they are attributed to another org. They may need to be moved to your attribution panel.

In the Patient Detail page, use the filters to pull a roster of these patients. Check if they have recent visits at their attributed org. If you are the primary source of care, coordinate with MCOs on re-attribution.

3.3. Patient Detail

This page displays patient-level data on two types of patients: (1) patients who are attributed to your organization and (2) patients who have an MRN at your organization but are attributed to another Medicaid provider. Filters can be used to segment the population into a various sub-groups based on attribution status, patient engagement status, and other patient characteristics.
3.3.1. **Quick Filters In-Depth**

The filters toolbar is available on the Patient Detail page. This toolbar features three sets of common filters used for narrowing the population to create actionable patient lists. Filters are described below from left to right:

1. **Attribution Filters**
   a. “Attributed Org” – Filter patients based on the PATH organization that they are attributed to. Users select from a list of PATH clinics, with the ability to select their own organization and/or other PATH organizations.
   b. “Attributed PCP” – Filter patients based on the individual provider or group NPI that they are attributed to. Users select from a list of provider names that are associated with PATH clinics.

2. **Patient Engagement Filters**
   a. “MRN at my org” – Filter patients based on whether they have an MRN at your organization.
   b. “Encounter at attributed org” – Filter patients based on whether they have an encounter at their attributed organization. Users select from a list of options to view patients who have had an encounter in the past 1 year, 1-2 years ago, 2-3 years ago, or never or greater than 3 years ago.
   c. “Encounter at org with MRN” – Filter patients based on whether they have an encounter at an organization where they have an MRN. Users select from a list of options to view patients who have had an encounter in the past 1 year, 1-2 years ago, 2-3 years ago, or never or greater than 3 years ago.

3. **Other Filters**
   a. “MCO Plan” – Filter patients based on the MCO plan in which they are enrolled.
   b. “Parish” – Filter patients based on the Louisiana Parish where the patient lives.
Common User Functions and Tasks

4. Export a patient list or other report contents

Exporting a patient list to Excel is a top use case for the MCO Attribution Report. First, use the filters to define and narrow the patient list based on your desired criteria. Follow the steps below to export the list to Excel.

1. **Left.** Hovering over the top-right corner of the data table and click on the ellipses to open an additional options menu. Click on “Export Data.”

2. **Right.** A dialog box will appear asking “which data do you want to export?” and Power BI will process the table. After a moment, a dialog box should appear to let you save the data in a preferred location.

The full contents of the Report visuals can be exported to PDF or PowerPoint by clicking on the “Export” icon in the top left corner of the webpage (as pictured below).

4.1. How to evaluate your overall performance on attributed patient engagement

The funnel chart on the Attributed Summary page shows a cascade of patient engagement levels, which can be used to “see how you’re doing” on engaging your attributed patients. To evaluate MCO-level performance, users can refer to the stacked bar charts.
4.2. How to view the distribution of your attributed patients across providers

In the Attributed Summary page, the Patients by PCP chart displays the number of patients attributed to each provider in your organization, including both individual providers and group/facility provider NPIs. To gain more insights on a PCP, click on their name or NPI in the chart and observe how the nearby visuals are adjusted to only display data on the selected PCP. For example, you can view the funnel chart to evaluate engagement of the PCP’s attributed patients. You can also view which plans are (or are not) attributed patients to the selected PCP.
4.3. Use the Patient Detail page to identify my attributed patients who have an MRN at my org but are overdue for a visit

On the patient detail page, use the filter options illustrated below to produce a list of these patients.

1. Select your organization as the “Attributed Org” (ex. TSO Org).
2. Under “MRN at my org,” select “MRN” to select patients who have an MRN with your organization.
3. Under “Encounter at attributed org,” select all options except for “In past 1 year” to show patients that have visited the clinic beyond one year ago.
4. View or export the list of patients who haven’t visited your organization in the past year.

<table>
<thead>
<tr>
<th>MCO recipient ID</th>
<th>Attributed org</th>
<th>Last encounter at attributed org</th>
<th>Org with MRN</th>
<th>Last encounter at MRN</th>
<th>MRN</th>
<th>First name</th>
<th>Last name</th>
<th>DOB</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>4066968214</td>
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<td>TSO Org</td>
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<td></td>
<td></td>
<td></td>
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<td>TSO Org</td>
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<td></td>
<td>71899, 1608 CAROL SUE AVE APT 12, GRETA, LA, 70056, 50433314</td>
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<td>71899, 1608 CAROL SUE AVE APT 12, GRETA, LA, 70056, 50433314</td>
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<td></td>
<td></td>
<td>71899, 1608 CAROL SUE AVE APT 12, GRETA, LA, 70056, 50433314</td>
</tr>
</tbody>
</table>

4.4. Use the Patient Detail page to identify my attributed patients who haven’t yet established care

On the patient detail page, use the filter options illustrated below to produce a list of these patients.

<table>
<thead>
<tr>
<th>MCO recipient ID</th>
<th>Attributed org</th>
<th>Last encounter at attributed org</th>
<th>Org with MRN</th>
<th>Last encounter at MRN</th>
<th>MRN</th>
<th>First name</th>
<th>Last name</th>
<th>DOB</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>315025073663</td>
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<td>XEL Org</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>444 GROVEWOOD DRIVE, GRETA, LA, 70056, 50400275</td>
</tr>
<tr>
<td>317491421382</td>
<td>TSO Org</td>
<td>CAS Org</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3341 WHISPER LANE, GRETA, LA, 70056, 50455318</td>
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<tr>
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<td>1812 SHIRLEY DRIVE, NEW ORLEANS, LA, 70114, 50422446</td>
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<td></td>
<td></td>
<td></td>
<td>8123 DALTON ST, METAURIE, LA, 70003, 50406755</td>
</tr>
</tbody>
</table>

**Pro Tip:** Want to exclude patients who are already receiving care elsewhere? The “encounter at org with MRN” filter can be used to focus only on patients without a recent visit at another PATH org.

4.5. Use the Patient Detail page to identify patients who have an MRN at your org but are attributed to another provider so you can try to move them to your panel

On the patient detail page, use the filter options illustrated below to produce a list of these patients.
2. Under “MRN at my org,” select “MRN” to select patients who have an MRN with your organization.
3. Export the list of your patients that are attributed to other PATH organizations.

Pro Tip: Want to focus on patients with a recent encounter at your org? Want to exclude patients who had a recent visit at their attributed org? Use both encounter filters to layer on those additional criteria.

4.6. How to identify your attributed patients with a recent hospital encounter

At this time, the MCO Attribution Report does not contain information about a patient’s hospital utilization. However, the Hospital Utilization (HU) Report is equipped with the ability to filter or sort patients by attribution status, as illustrated below. This allows users to identify attributed patients with a hospital encounter in the past six months (or other selected time period).

In the HU Report:
1. Open the “Encounter Detail” page.
2. Under “Patient Attribution Status,” select “Attributed” to select patients who are attributed to your organization.
3. Export the list of attributed patients with recent hospital encounters.
5. Troubleshooting

5.1. I forgot my password
If you have forgotten your password, then you will need to reset your password. To reset your password, open the login page and at the bottom of the dialog box click the link that says, “Forgot my password.” Then, Microsoft will ask you to verify your identity through the multi-factor authentication (MFA) methods that you set up initially. Once you have been verified, you can create a new password.

5.2. My verification or authentication failed/did not work
If you encounter an error message during the authentication process, then it’s likely that there is an issue with the multi-factor authentication methods. Please contact GNOHIETeam@lphi.org to troubleshoot the error.

5.3. I don’t see my report in Workspaces
After logging into Microsoft Power BI, sometimes you might not see your report(s) in the Workspaces. This is commonly due to Microsoft automatically logging in users using a different account than the GNOHIE account. Check the user profile in the top right corner (as seen to the right). The GNOHIE account email should end with @gnohie.lphi.org.

If you have confirmed that you’re signed into the correct account but still do not see the report(s) in Workspaces, please contact GNOHIETeam@lphi.org.

To avoid this happening in the future, the team recommends creating a dedicated browser profile for GNOHIE reports to easily switch Microsoft accounts through your preferred internet browser. The setup guide can be found here.

5.4. My report is not updated or does not show updated information
There may be instances where data entries are not updated on your report. Please try these steps to resolve the issue.

1. Refresh the page and data cache by pressing F5 to reload the report
2. Terminate the application by pressing “Ctrl + Alt + Delete” together and it will close the browser. Reopen the report and try again.
3. If neither solution works, please contact GNOHIETeam@lphi.org.

6. Contact Us

The PATH team is available to answer your questions and troubleshoot any issues that may arise. Please contact GNOHIETeam@lphi.org with any questions or issues.

We want to hear from you! If you have feedback or suggestions on how we can improve the MCO Attribution Report, please reach out to Kyla Mor at kmor@lphi.org.