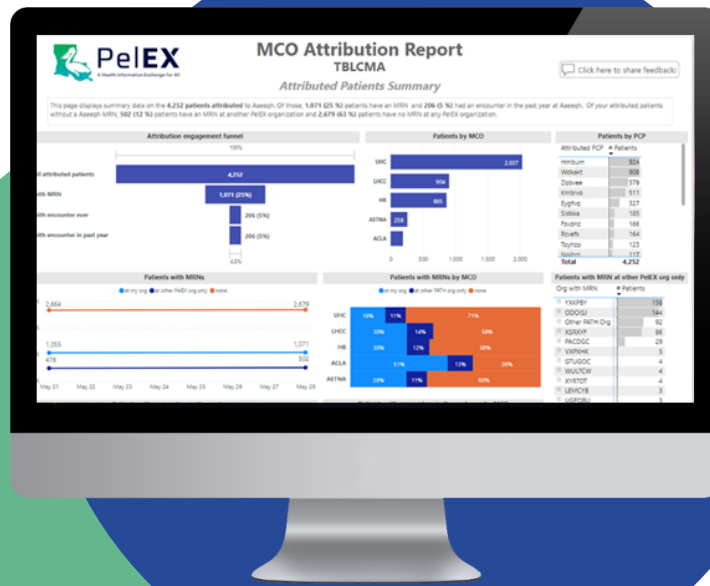




PeLEX
A Health Information Exchange for All

MCO Attribution Report User Guide



Last Updated: June 2023

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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 and MRN at your organization but are attributed to another Medicaid provider.

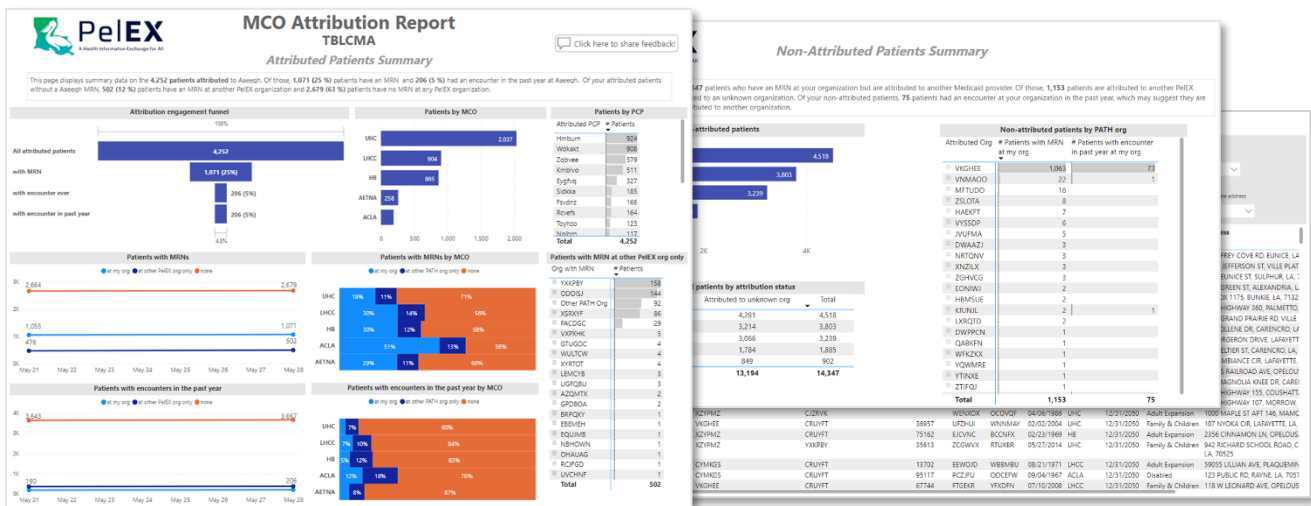
Members can use the MCO Attribution Report to:

- 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 seven pages: (1) Attributed Summary, (2) Non-Attributed Summary, (3) UDS Reporting, (4) Patient Detail, and (5) Eligibility Ending, (6) Provider Roster Analysis, and (7) 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 PeLEX clinics, and provider NPI data.

Medicaid MCO data: PeLEX 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 PeLEX on a monthly basis and the attribution data on a weekly basis. PeLEX matches the MCO

attribution data against the provider NPI lists submitted by PeEX clinics in order to identify all patients who are attributed to all providers each organization.

Clinic patient data: PeEX 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 PeEX. 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: PeEX 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 PeEX, which should be updated quarterly or as needed. To obtain group-level NPIs, PeEX 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

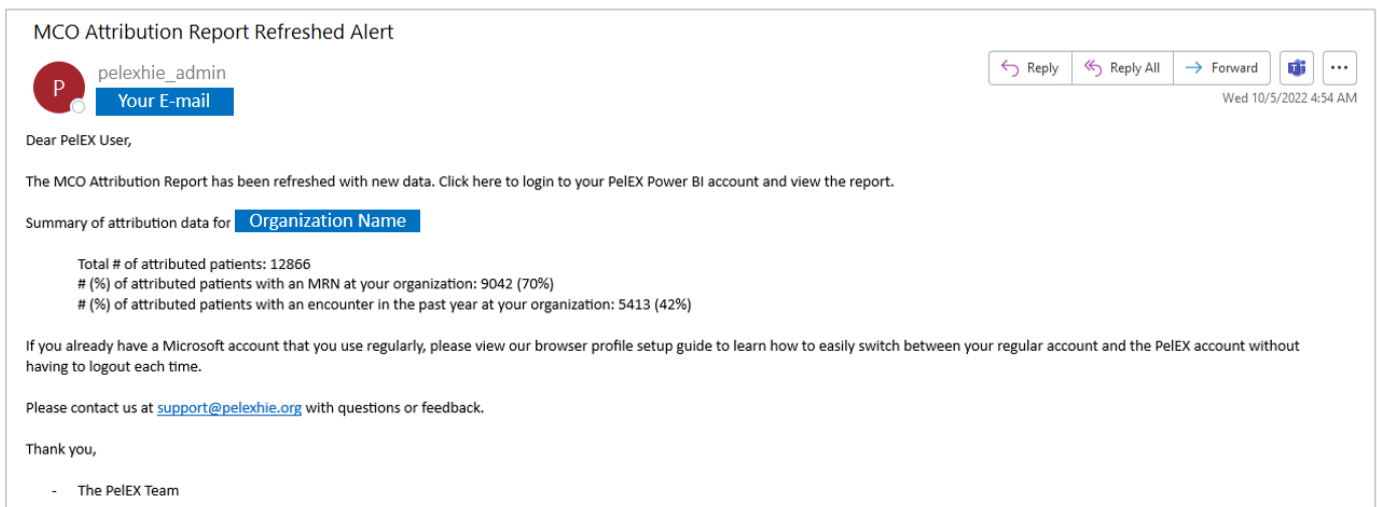
The MCO Attribution Report data is automatically updated weekly on Wednesday or Thursday of each week. The updated report data reflects the current attribution data, meaning that newly attributed patients have been added to the report and patients who are no longer attributed (due to provider reassignment, 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 PeEX, users may experience some variation in the report update frequency. The PeEX 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, PeEX 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.

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

A sample email alert is pictured below:



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 PeEX 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, PeEX 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 [PeEX User Request Form by following the hyperlink](#). Depending on user permissions determined by your organization, users can access other PeEX 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 PeEX 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 PeEX within 7 Days of User Transitions:** Member organizations should promptly inform the PeEX 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 PeEX user access control policy, members must notify the PeEX team within 7 business days of a user's employment or contract ending. The PeEX 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 seven pages:

1. Attributed Summary
2. Non-Attributed Summary
3. UDS Reporting
4. Patient Detail
5. Eligibility Ending
6. Provider Roster Analysis
7. About This Report page.

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.



PeIEX
A Health Information Exchange for All

MCO Attribution Report

1 TBLCMA

Attributed Patients Summary

[Click here to share feedback!](#)

2. Organization Name
This page displays summary data on the 4,252 patients attributed to Aaeqeh. Of those, 1,071 (25 %) patients have an MRN and 206 (5 %) had an encounter in the past year at Aaeqeh. Of your attributed patients without a Aaeqeh MRN, 502 (12 %) patients have an MRN at another PeIEX organization and 2,679 (63 %) patients have no MRN at any PeIEX organization.

3. Engagement Funnel
A funnel chart shows the proportion of your attributed patients who have various levels of engagement at your clinic, with an encounter in the past year being the highest level

Engagement Level	Count	Percentage
All attributed patients	4,252	100%
with MRN	1,071	25%
with encounter ever	206	5%
with encounter in past year	206	5%

4. Patients by MCO

MCO	Count
UHC	2,037
LHCC	904
HB	865
AETNA	258
ACLA	108

5. Patients by PCP

Attributed PCP	# Patients
Hmburn	934
Wolakit	908
Zobee	579
Kmbbio	511
Eyqfiv	327
Siekka	185
Fvndz	166
Rcvefs	164
Toytzo	123
Nlnhzn	117
Total	4,252

6. Trends Over Time
Line graphs show change over time in the % of your attributed patients who have an MRN or recent encounter at your org, other PeIEX orgs, or nowhere.

Patients with MRNs

Date	at my org	at other PeIEX org only	none
May 21	2,664	1,055	476
May 28	2,679	1,071	502

Patients with MRNs by MCO

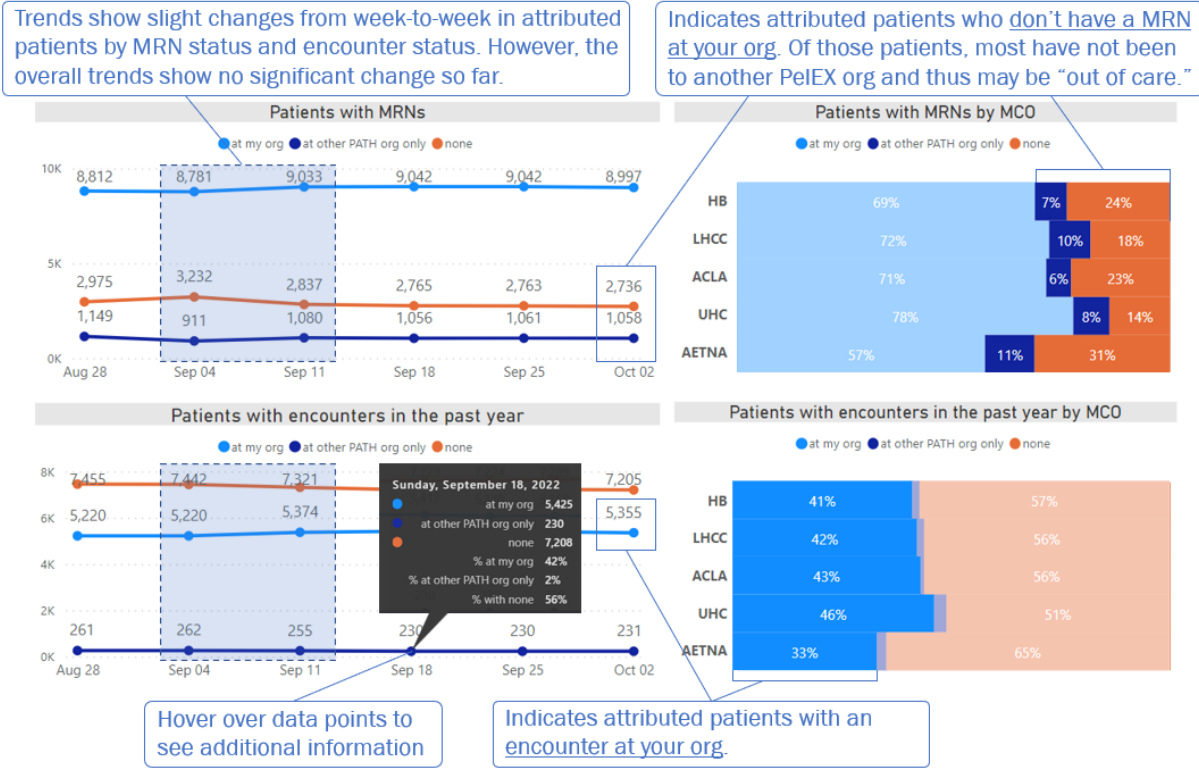
MCO	at my org	at other PATH org only	none
UHC	18%	11%	71%
LHCC	30%	14%	56%
HB	30%	12%	58%
ACLA	51%	13%	36%
AETNA	29%	11%	60%

5. Provider Breakdown
Two tables show the # of attributed patients per PCP in your organization and the # of attributed patients with an MRN at another PeIEX org.

Org with MRN	# Patients
YXKPBV	158
ODDJSJ	144
Other PATH Org	92
XSRWFF	86
PACDGC	29
VXPKHK	5
GTUGOC	4
WUICWV	4
XYRTOT	4
LEMTCB	3
UGFQBU	3
AZQMTX	2
GPDBOA	2
BRPQXY	1
EBEMEH	1
EQUIMB	1
NBHOWN	1
OHAIJG	1
RCIFGD	1
LIVCHNF	1
Total	502

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 PeEX 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.

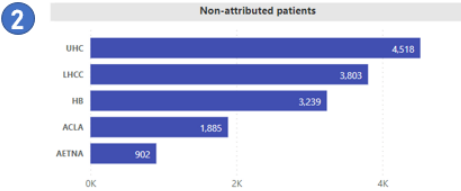
1. Page Summary
A brief narrative overview, highlighting key statistics.



Non-Attributed Patients Summary

This page displays summary data on the 14,347 patients who have an MRN at your organization but are attributed to another Medicaid provider. Of those, 1,153 patients are attributed to another PeEX organization and 13,194 patients are attributed to an unknown organization. Of your non-attributed patients, 75 patients had an encounter at your organization in the past year, which may suggest they are actively engaged with you despite being attributed to another organization.

2. Patients by MCO
Bar chart shows the # of non-attributed patients by MCO plan.



3. Patients by Attribution
Table shows the # of your patients by MCO plan who are attributed to another PeEX org or an unknown org.

MCO	Attributed to PeEX org	Attributed to unknown org	Total
UHC	237	4,281	4,518
LHCC	589	3,214	3,803
HB	173	3,066	3,239
ACLA	101	1,784	1,885
AETNA	53	849	902
Total	1,153	13,194	14,347

4. Patients by PeEX Org
Table shows the # of your patients who are attributed to other PeEX orgs.

Attributed Org	# Patients with MRN at my org	# Patients with encounter in past year at my org
VKGHEE	1,063	73
VNMAOO	22	1
MFTUDO	16	
ZSLOTA	8	
HAEKFT	7	
VYSSDP	6	
JVUFMA	5	
DWAAZJ	3	
NRTQNV	3	
XNZILX	3	
ZGHVCG	3	
EONIWI	2	
HBMSUE	2	
KRJNIL	2	1
LXRQTD	2	
DWPPCN	1	
QABKFN	1	
WFKZCX	1	
YQWMRE	1	
YTXNKE	1	
ZTIFQJ	1	
Total	1,153	75

3.2.1. Non-Attributed Patients by PeEX 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 PeEX 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 PeEX 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.

Attributed Org	# Patients with MRN at my org	# Patients with encounter in past year at my org
EDU Org	4,942	718
CAS Org	1,456	209
XEL Org	842	116
CB Org	759	139
NIU Org	712	69
RCC Org	441	40
ONA Org	156	7
HPR Org	143	25
CH Org	110	36
GC Org	74	10
UOO Org	68	10
TSM Org	66	7
PJA Org	65	3
LPU Org	48	3
DOS Org	47	1
TSA Org	36	6
TST Org	36	
KR Org	31	3
ACS Org	30	1
GP Org	20	2
POH Org	14	2
PFA Org	7	
RBC Ora	4	
Total	10,107	1,407

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.

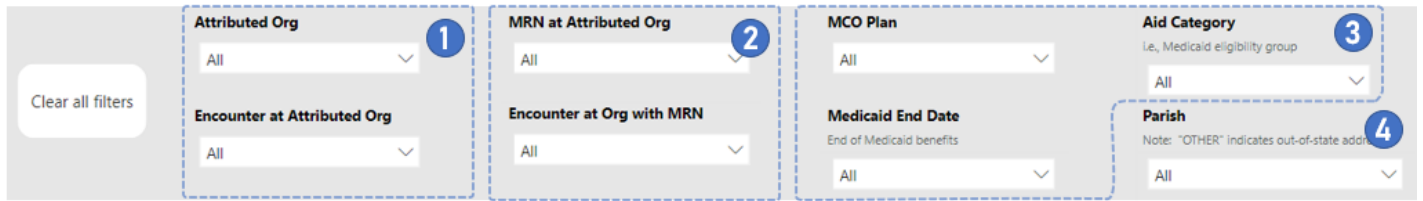
1. Quick Filters
Multiple filters allow for data manipulation for commonly sorted categories.

2. Patient Detail
The table shows all patients, including their MCO recipient ID.

MCO recipient ID	Attributed org	Last encounter at attributed org	Org with MRN	Last encounter at org with MRN	MRN	First name	Last name	DOB	MCO	Medicaid end date	Aid category	Address
11101371108	WRBJXO		ZWPUIAZ		A1S/QRDZ	IDLEBE	HPXEHE	09/08/1982	AETNA	12/31/2050	Adult Expansion	6906 ORLEANS AVE, NE
41762306788	EUMKVV		ZWPUIAZ		DO5517K	QVMFCW	FOCZRC	10/02/1979	ACLA	12/31/2050	Disabled	119 RIVERWOOD DRIVE
41997672893	KPMDKN		ZWPUIAZ		AL4281NY	BDUXIA	ZQAWJI	01/10/1983	HB	12/31/2050	Adult Expansion	3320 ARKANSAS AVE, K
42884004739	KPMDKN		ZWPUIAZ		GOD1201	VVRISE	CKITXO	11/25/1961	LHCC	12/31/2050	Disabled	1530 GRAVIER ST, NEW
57499137943	QFICYJ		ZWPUIAZ		NH9223N	YKQWIB	TBQHJT	11/21/1960	HB	12/31/2050	Disabled	306 GERMAN LN, LAFAY
60942797243	KPMDKN		ZWPUIAZ		JB2133ET2	NHVNVMV	VNYZHK	02/15/1980	UHC	12/31/2050	Adult Expansion	8412 COLONEL DR, CHA
68398859655	QFICYJ		ZWPUIAZ		H25101RA	WMEUKT	CJYSUP	01/18/1981	LHCC	12/31/2050	Adult Expansion	916 N TONTI ST, NEW O
70833933680	QFICYJ		ZWPUIAZ		EL1720CE	GEOLIK	BZFIFO	10/18/1971	LHCC	12/31/2050	Adult Expansion	1308 S PRIEUR ST, NEW
83491331833	QFICYJ		ZWPUIAZ		CP2007e2	EINRBB	LPQATA	03/10/1960	HB	12/31/2050	Adult Expansion	3642 HIGGINS BLVD, NE
85564798477	QFICYJ		ZWPUIAZ		PM2474A	KSNJRN	HJTFML	09/23/1969	AETNA	12/31/2050	Adult Expansion	2015 DUPONT DR, TERR
95191245566	PGSEOU	03/08/22	ZWPUIAZ		DC2841LP	OKZZDF	EWUORQ	04/07/1978	AETNA	12/31/2050	Disabled	4660 PRESS DRIVE, NEV

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 PeLEX organization that they are attributed to. Users select from a list of PeLEX clinics, with the ability to select their own organization and/or other PeLEX 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 PeLEX clinics.

2. Patient Engagement Filters

- a. **“MRN at Attributed Org”** – Filter patients based on whether they have an MRN at the selected Attributed organization(s).
- 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. Medicaid Filters

- a. **“MCO Plan”** – Filter patients based on the MCO plan in which they are enrolled.
- b. **“Medicaid End Date”** – Filter patients by patients who have Medicaid eligibility end date in the past 2 months or the next 2 months.
- c. **“Aid Category”** – Filter patients by their Medicaid eligibility group (i.e. Adult Expansion, Aged, Blind, Disabled, Family & Children, LIFC, OCS Foster Care, OCS/OYD (IV-E), OCS/OYD (XIX), QMB). The definitions of these categories are listed in the “About this report” page of the report.

4. “Parish” – Filter patients based on the Louisiana parish where the patient lives.



Pro Tip: Patients with expiring Medicaid benefits can be easily found on the “Eligibility Ending” page. On the Patient Details page, you may find patients with a 2050 ending year, which indicates that individual is enrolled in Open-Ended Eligibility and their benefits are not set to expire.

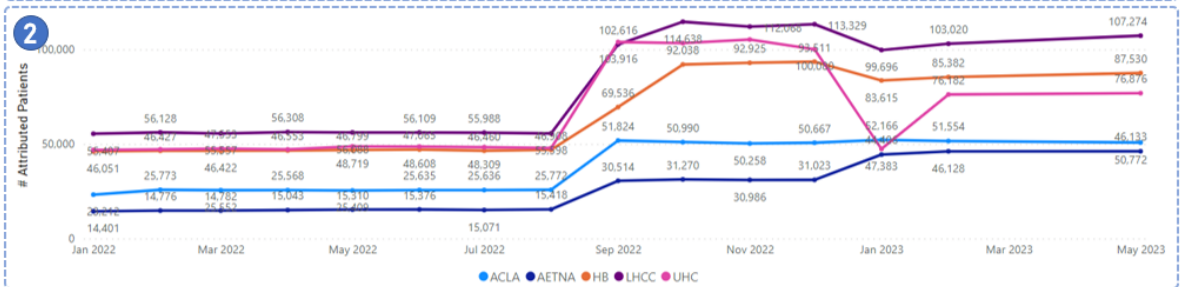
3.4. UDS Reporting

This page is specifically designed to support users with required annual UDS reporting. This page displays a monthly count and monthly trendlines for the number of attributed patients categorized by MCO plan. The monthly count is based on the number of patients attributed to the user's organization as of the first week of each month. *Please note that data is only available starting September 2022.*

1. Monthly Breakdown
The table shows the number of monthly attributed patients by MCO Plan.

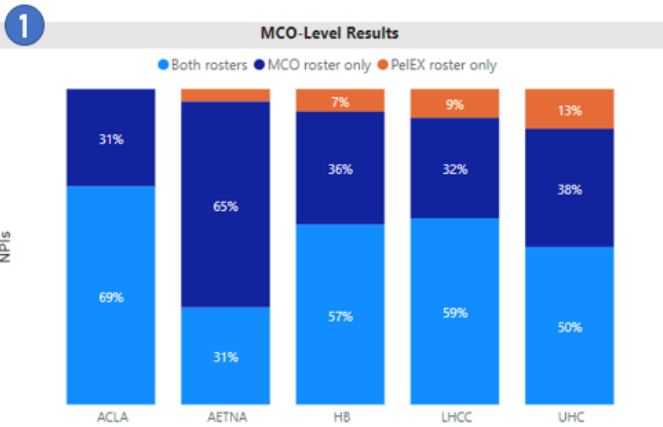
Attributed Patients by MCO & Month						
Year	ACLA	AETNA	HB	LHCC	UHC	Total
2023						
May	50,772	46,133	87,530	107,274	76,876	368,585
February	51,554	46,128	85,382	103,020	76,182	362,266
January	52,166	44,406	83,615	99,696	47,383	327,266
2022						
December	50,667	31,023	93,511	113,329	100,080	388,610
November	50,258	30,986	92,925	112,068	105,232	391,469
October	50,990	31,270	92,038	114,638	103,346	392,282

2. Trends Over Time
The line graph shows change in number of monthly attributed patients by each MCO plan.



3.5. Provider Roster Analysis

This page of the report presents the results of a one-time comparison analysis performed by PeEX using MCO provider group data from January-March 2023. PeEX obtained a list of all provider NPIs that each MCO believes is associated with a given provider group or organization. PeEX compared that information against the provider NPI rosters that each organization submitted to the PeEX team to support our MCO Attribution Services. PeEX encourages participants to use these results to identify any discrepancies between the provider rosters maintained by the MCOs and the rosters that participants submitted to PeEX. The ultimate goal is for all providers to be on both rosters.



2. Provider-Level Results

NPI	Provider name	MCO	Provider roster analysis results	PeEX count of attributed patients	MCO count of attributed patients
1013640457	Bapxdl	LHCC	Both rosters	6	2
1013640457	Hwypqy	HB	MCO roster only	0	25
1013640457	Wwwqgo	UHC	PeEX roster only	2	0
1033432372	Yixfsd	AETNA	MCO roster only	0	7
1033864491	Tskzke	ACLA	MCO roster only	0	35
1033864491	Ahyjyv	AETNA	MCO roster only	0	2
1033864491	Bkyfwh	HB	MCO roster only	0	47
1073724514	Btpyhw	ACLA	Both rosters	3	3
1073724514	Dtltiv	AETNA	Both rosters	3	3
1073724514	Icbrob	HB	Both rosters	85	63
1073724514	Pjaami	LHCC	Both rosters	18	21
1073724514	Jotuof	UHC	Both rosters	792	820
1124108501	lvnfto	AETNA	MCO roster only	0	4
1134123706	Eixhps	AETNA	MCO roster only	0	7
1205918513	Leqvor	AETNA	MCO roster only	0	4
1205918513	Voyhte	LHCC	MCO roster only	0	8

1. Roster Overlap Analysis
Column chart shows % of providers by roster

2. Roster Results by Provider
The table shows all PCPs, which rosters they appear on, and count of attributed patients on each roster by provider.

PeEX has requested that the MCOs include the provider group information in the standard weekly attribution file, which would allow PeEX to continuously re-run this analysis and help participants monitor the accuracy of their provider rosters.

Definitions:

- **Both rosters = Both PeEX and the selected MCO recognize this provider as employed by your org.** When the MCO attributes patients to this provider, the MCO considers those patients to be attributed to your org. When PeEX views the attribution data, PeEX considers any patients attributed to this provider as attributed to your org. Therefore, patients attributed to this provider are accurately portrayed in PeEX's MCO Attribution Services. (Note: PeEX and the selected MCO may have slightly different counts of the patients attributed to this provider due to small time lags between the PeEX and MCO data sources used in this analysis.)
- **MCO roster only = The selected MCO recognizes this provider as employed by your org, but PeEX does not.** When the MCO attributes patients to this provider, the MCO considers those patients to be attributed to your org. However, since the provider was missing from the roster that you submitted to PeEX, PeEX's MCO Attribution Services do not display this provider's attributed patients as being attributed to your org. If this provider is employed by your org, please notify the PeEX team at support@pelexhie.org as soon as possible so we can add them to your provider roster.
- **PeEX roster only = PeEX recognizes this provider as employed by your org, but the selected MCO does not.** When the MCO attributes patients to this provider, the MCO does NOT consider those patients to be attributed to your org. However, since the provider was on the roster you submitted to PeEX, PeEX's MCO Attribution Services display this provider's attributed patients as being attributed to your org. If this provider is NOT employed by your org, please notify the PeEX team at support@pelexhie.org as soon as possible so we can remove them your provider roster.

3.6. Eligibility Ending

This page identifies patients whose Medicaid benefits will expire in the next 2 months or already expired within the past 2 months. Unlike the Patient Details page, this page is filtered to display information on those with expiring benefits only. Participants can use this list to proactively reach out to patients and help them renew their Medicaid benefits or navigate other coverage options.

1. Quick Filters
Multiple filters allow for data manipulation for commonly sorted categories.

2. Patient Detail
The table shows all patients, including their MCO recipient ID.

Patients with Ending Eligibility

1

Attributed Org: All | MRN at Attributed Org: All | MCO Plan: All | Aid Category: All

Encounter at Attributed Org: All | Encounter at Org with MRN: All | Medicaid End Date: All | Parish: All

Clear all filters

Note: "OTHER" indicates out-of-state address

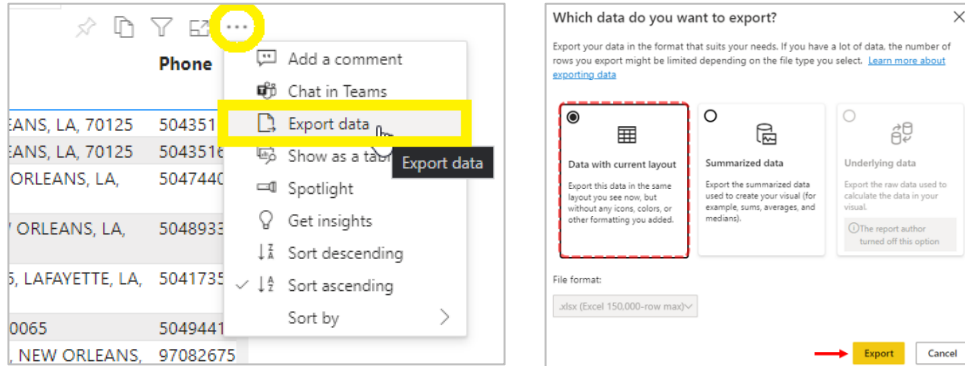
MCO recipient ID	Attributed org	Last encounter at attributed org	Org with MRN	Last encounter at org with MRN	MRN	First name	Last name	DOB	MCO	Medicaid end date	Aid category	Address
4313327845	KPMDKN		TPLQSR			HQTAAS	OZDQRN	2/10/2014	ACLA	6/30/2023	Disabled	31623 WALLER TOMBALL RD A. WALLER
5878616177	KPMDKN		TPLQSR			GLIJAP	EPWKFL	9/20/2016	ACLA	6/30/2023	Family & Children	13278 PERKINS RD. BATON ROUGE, LA, 70801
8391691620	KPMDKN		TPLQSR			GIVGQT	DVJLVN	10/11/2002	ACLA	4/30/2023	Adult Expansion	1603 3RD ST APT 4. LAKE PROVIDENCE, LA, 70004
13173085594	KPMDKN		OUHMYV			EEHREA	DOVMDX	4/24/2014	ACLA	7/31/2023	Family & Children	7323 PERTH ST. NEW ORLEANS, LA, 70112
13868807604	KPMDKN		TPLQSR			LAAXTL	LMALRX	7/4/2012	ACLA	5/31/2023	Family & Children	25 PROSPECT ST. ALEXANDRIA, LA, 71301
17991295888	KPMDKN		OUHMYV			WFZMDD	GYWDAV	9/9/2016	ACLA	6/30/2023	Family & Children	58411 DOGWOOD CIR. AMITE, LA, 70422
20448339484	KPMDKN		TPLQSR			OITHZS	YLPWIP	5/15/2004	ACLA	6/30/2023	Family & Children	2804 RUSH ST. SLAUGHTER, LA, 70777
20530109624	KPMDKN		TPLQSR			VDGQUR	FKRZTX	3/3/2007	ACLA	6/30/2023	Family & Children	600 HICKORY ST. NEW LLANO, LA, 71466
21379020223	KPMDKN		TPLQSR			TUPAME	GHGWFG	4/13/2018	ACLA	5/31/2023	Disabled	3605 HAZEL DR. MERAUX, LA, 70075
27273612510	KPMDKN		TPLQSR			UTAKOQ	CPLGNC	9/16/1991	ACLA	6/30/2023	Family & Children	36 NEVAY DR. NOBLE, LA, 71462
28860303896	KPMDKN		TPLQSR			FBZVQV	KVKGYK	6/24/2004	ACLA	6/30/2023	Family & Children	622 KINGRIDGE PL. SHREVEPORT, LA, 71375
30349420293	KPMDKN		TPLQSR			XZYCCQ	OVWAYI	10/29/2004	ACLA	5/31/2023	Family & Children	1108 INA CLAIRE DR. OPELOUSAS, LA, 71454
30597974747	KPMDKN		URKLQS		353024	TNBEWG	ZMORIU	8/19/1989	ACLA	5/31/2023	Adult Expansion	15995 HIGHWAY 3235. CUT OFF, LA, 70310
31464212992	KPMDKN		TPLQSR			XPAXEG	OUOCBU	9/24/1968	ACLA	6/30/2023	Adult Expansion	246 FELIX ST. MARKSVILLE, LA, 71351
38582668974	KPMDKN		KPALHY		470749	DYHMRX	EZJTML	9/21/2016	ACLA	5/31/2023	Family & Children	3877 PAUGER ST. NEW ORLEANS, LA, 70112
38662183806	KPMDKN		URKLQS		522522	DCRBCY	CNSGZV	6/2/2007	ACLA	5/31/2023	Family & Children	316 N ROCHEBLAVE STREET. NEW ORLEANS, LA, 70112
39011946052	KPMDKN		TPLQSR			NLNEPA	AKFENX	8/29/2006	ACLA	3/31/2023	Family & Children	25 BERKELEY DR. DOUGLASVILLE, GA, 30106
40351189331	KPMDKN		TPLQSR			USIBKU	AFZPIW	9/1/2006	ACLA	3/31/2023	Family & Children	2002 SUMMERWALK PKWY. TUCKER, GA, 30084
42481656705	XENHCZ		TPLQSR			YHKMSL	WWGGIM	9/21/2007	ACLA	3/31/2023	Family & Children	1304 ADAMS ST. BAYTOWN, TX, 77520
47623229141	KPMDKN		OUHMYV			YCMKSZ	QTYTZW	9/26/2015	ACLA	6/30/2023	Family & Children	C/O ANNISA THOMPSON. HARVEY, LA, 70058

4. Common User Functions and Tasks

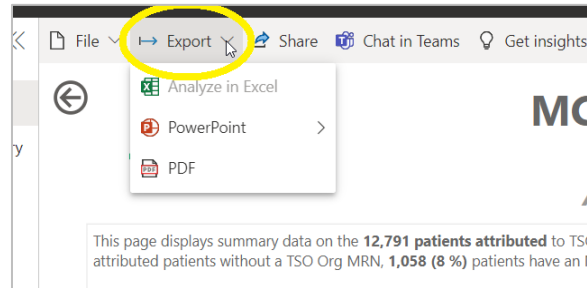
4.1. Export a patient list or other report contents

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).

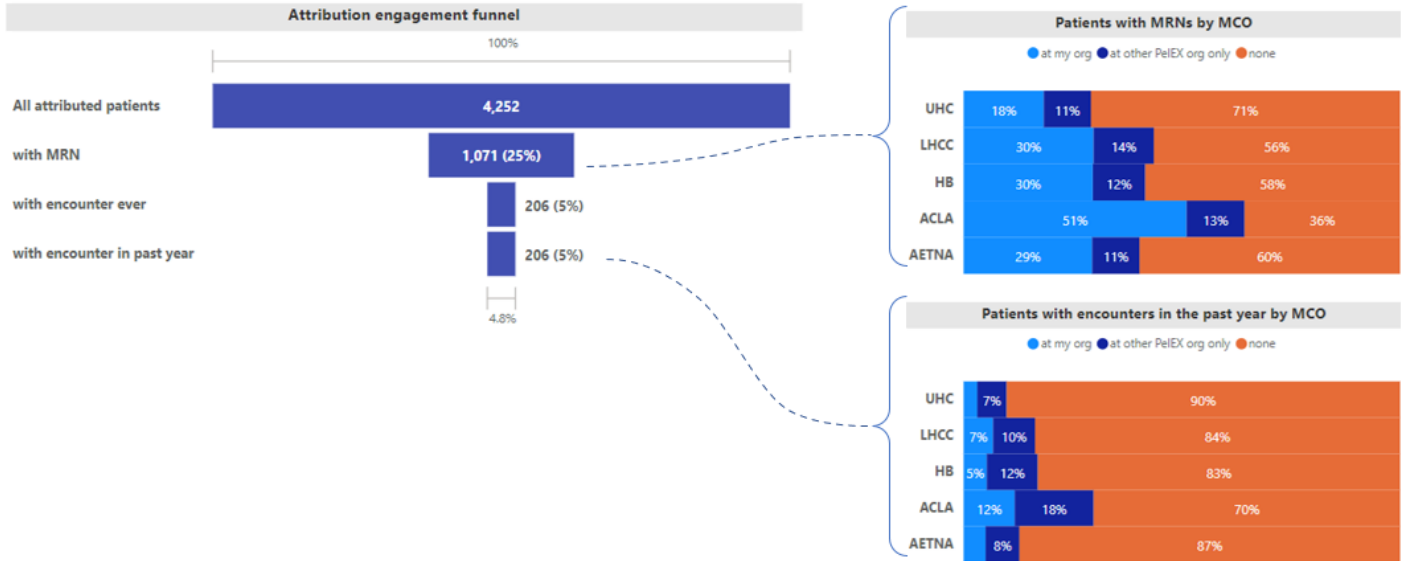


4.2. How to evaluate your overall performance on attributed patient engagement

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.

The funnel chart offers a quick visual representation of performance across various levels of patient engagement...

...which is then segmented by MCO plan

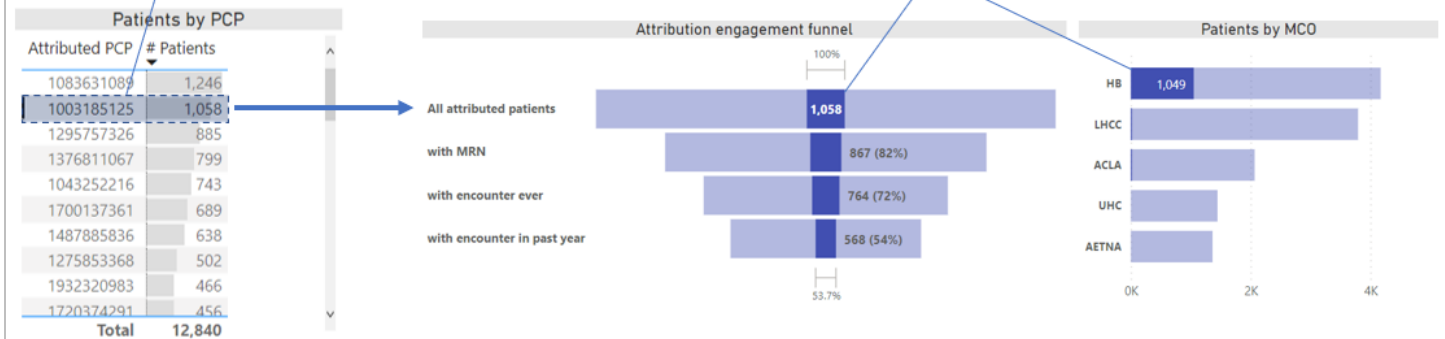


4.3. How to view the distribution of your attributed patients across providers

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.

Click on a specific provider in the table to view interaction with other data visualization.

Explore patient engagement performance by provider or understand which MCO plans are (or aren't) assigning patients to each provider.



4.4. 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. AIHYCX).
2. Under “MRN at Attributed 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 the Attributed organization in the past year.

MCO recipient ID	Attributed org	Last encounter at attributed org	Org with MRN	First name	Last name	DOB	MCO	Medicaid end date	Aid category	Address	
5203114598901	AIHYCX	02/28/19	ZWPUAZ	CC	RRFESI	06/14/1986	LHCC	12/31/2050	Adult Expansion	PO BOX 4172, COVI	
1032145455660	AIHYCX		ZCHDFL	WVK	ZWMUZW	05/24/1973	HB	12/31/2050	Adult Expansion	PO BOX 143, NATAL	
5203115068601	AIHYCX		ZCHDFL	WFX	RXODQE	08/30/1997	LHCC	12/31/2050	Adult Expansion	21028 LUNA LN, FR	
7769999017723	AIHYCX		ZCHDFL	EBQ	IBDMYB	11/07/1979	UHC	12/31/2050	Adult Expansion	26236 GALATAS RD	
8274517573777	AIHYCX	10/18/22	ZCHDFL	KJC	ORULIF	09/27/1983	HB	12/31/2050	Adult Expansion	23490 BLOODRIVER	
1123232937684	AIHYCX		YKHOIK	31182	PTWKKQ	08/04/1985	LHCC	12/31/2050	Adult Expansion	8871 REMINGTON F 70706	
1703088688420	AIHYCX	10/21/16	YKHOIK	42851	WEPOFL	DFVLML	12/06/1967	LHCC	12/31/2050	Adult Expansion	1138 GEORGIA AVE.

4.5. 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.

MCO recipient ID	Attributed org	Last encounter at attributed org	Org with MRN	Last encounter at org with MRN	MRN	First name	Last name	DOB	MCO	Medicaid end date	Aid category	Address
2130490661731	AIHYCX		ZWPUAZ		JD2432AN 30646	LFBILLA	BDFFHF	11/26/1983	HB	12/31/2050	Adult Expansion	17255 RANDALL DR, LIVINGSTON
6763372664428	AIHYCX		ZWPUAZ		JM3280SK 27790	TQSUUG	XCSBKJ	01/31/1976	AETNA	12/31/2050	Adult Expansion	84189 HACKNEY RD, FOLSOM, LA
7682164738800	AIHYCX		ZWPUAZ		PP29VJ1SJ W	QCHVMO	MPSLDG	02/20/1974	HB	12/31/2050	Adult Expansion	20496 CARPENTER LN, SPRINGFIELD
3203002811603	AIHYCX		ZCHDFL	03/19/2020	22117	AEAYU	JLVIUW	08/18/1994	UHC	12/31/2050	Adult Expansion	3313 BLACK BAYOU, HOUMA, LA
3603084436702	AIHYCX		ZCHDFL	02/04/2020	25185	LRBCYY	LLNIKV	08/06/1995	HB	12/31/2050	Adult Expansion	23600 WILLIAMS LN, SPRINGFIELD
5203115398904	AIHYCX		ZCHDFL	03/11/2020	18874	DUMSPY	SPCMOE	01/20/1998	LHCC	12/31/2050	Adult Expansion	22901 HIGHWAY 40, BUSH, LA, 7



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 PeLEX org.

4.6. 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.

1. Under “Attributed Org,” select all organizations except for your organization (ex. AIHYCX).
2. Under “MRN at Attributed Org,” select “No MRN” to produce a list of patients who are attributed elsewhere but do not have MRNs at the other organization.
3. Export the list of your patients that are attributed to other organizations.

MCO recipient ID	Attribution	Encounter with MRN	Last encounter at org with MRN	MRN	First name	Last name	DOB	MCO	Medicaid end date	Aid category	Address
8811758694	KPMDK	D	10/17/2022	22626	AQMABW	OEMTYT	05/20/1966	LHCC	12/31/2050	Adult Expansion	22156 SHERIDAN RD, PONCHATC
32079717037	KPMDK	D	10/07/2022	23866	EGDTGF	ZOLFGA	04/14/1988	LHCC	12/31/2050	Family & Children	106 GOATFIELD RD, DULAC, LA, 7
46042403451	KPMDKN	ZCHDFL	07/21/2022	25938	BZYHCE	FVFBJE	10/25/2012	UHC	12/31/2050	Family & Children	1405 MEMORY LN, HOUMA, LA,
89168951045	KPMDKN	ZCHDFL	06/30/2022	26396	KREQVB	SYXMNA	02/25/1982	ACLA	12/31/2050	Adult Expansion	207 PELLEGRIN ST, CHAUVIN, LA,
106810647026	KPMDKN	ZCHDFL	09/27/2022	15089	URNQME	RCWCAD	01/09/1985	UHC	12/31/2050	LIFC	409 COUNTRY ESTATES DR, HOU
127816261315	KPMDKN	ZCHDFL	08/01/2022	14895	YXEAIQ	GZROGJ	07/06/2005	ACLA	12/31/2050	Family & Children	202 GLORIA ST APT 6, THIBODAL

Pro Tip: Want to focus on patients with a recent encounter at your org? Use the “Encounter at Org with MRN” filter to focus on patients with a visit in the past 1 year.

4.7. 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.

Hospital Enc ID	Clinic MRN	Name	DOB	Phone	Hospital	Enc Type	Admit Date	Time	Attribution Status	Established Status	Reason
600104985451	45427	ZERRICK SEHTOMMAH	11/09/1958	5044763822	Hospital 9	E	10/19/22	12:03 PM	Attributed	Established	
600104962374	139006	RODNEY SNOSNIBOR	04/01/1986	9853902826	Hospital 9	E	10/19/22	3:15 AM	Attributed	Established	
600104959008	104203	PAULETTE SREKRAP	09/07/1964	5045626039	Hospital 9	E	10/18/22	5:36 PM	Attributed	Established	
600104956414	120903	ASIAH SNILKNARF	07/09/1998	5046125154	Hospital 0	E	10/18/22	4:29 PM	Attributed	Established	
600104940965	2048	DARRINESHIA SROLYAT	01/23/1993	5047795515	Hospital 1	E	10/18/22	12:47 PM	Attributed	Established	
600104936076	65434	ANDREW SNOSNIBOR	12/28/1958	5043692039	Hospital 9	E	10/18/22	12:00 PM	Attributed	Established	
600104925270	82537	OARGARETTE SSNAVE	12/19/1965	5043494594	Hospital 9	E	10/18/22	10:46 AM	Attributed	Established	
600104928375	112470	MICHELLE SREYORT	06/03/1971	2158874455	Hospital 1	E	10/18/22	10:25 AM	Attributed	Established	
600104926237	15211	TYRONEKIA SNOSIRRAG	10/01/1991	5044481468	Hospital 0	E	10/18/22	9:58 AM	Attributed	Established	
600104911071	120982	SHELIA SNOEL	08/05/1958	5042556064	Hospital 9	E	10/17/22	11:55 PM	Attributed	Established	
600104907132	120982	SHELIA SNOEL	08/05/1958	5042556064	Hospital 0	E	10/17/22	4:22 PM	Attributed	Established	

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, then 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 support@pelexhie.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 PeEX account. Check the user profile in the top right corner (as seen to the right). The PeEX account email should end with **@pelexhie.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 support@pelexhie.org.

To avoid this happening in the future, the team recommends creating a dedicated browser profile for PeEX 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 support@pelexhie.org.

6. Contact Us

The PeEX team is available to answer your questions and troubleshoot any issues that may arise. Please contact support@pelexhie.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, you can press the “Click here to share feedback” button to complete a three-question survey. The feedback button is found in the top right corner of the Attribution Summary page, as pictured below.

