PelEX
A Health Information Exchange for All

Hospital Utilization Report

User Guide

Last Updated: April 2024

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1. Introduction to the Hospital Utilization Report

1.1. What is the Hospital Utilization Report?

The PelEX Hospital Utilization (HU) Report is a core product offering designed for members in an ambulatory care setting. It provides members with data on their patients' emergency department (ED) and inpatient (IP) encounters at participating hospitals in the past 6 months. The HU Report aims to:

- Improve care coordination
- Reduce readmissions
- Enable success in value-based care environments

Members can use the HU Report to:

- Facilitate timely follow-up visits after a hospital encounter
- Identify high-need, high-risk patients for additional outreach & support
- Monitor & track utilization trends over time
- Inform population health strategy

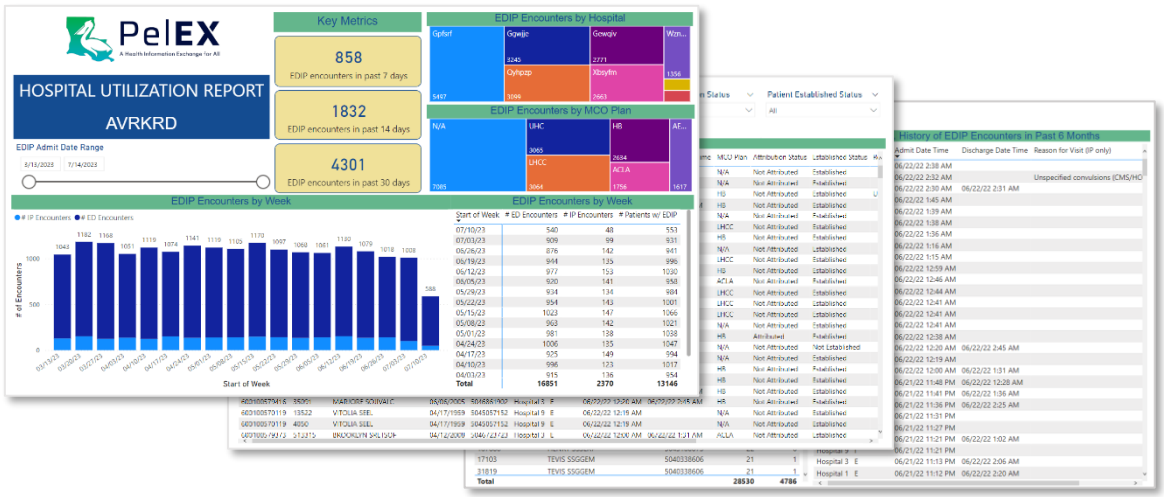
Note: As of June 2022, the HU Report will no longer be offering a "Standard" and "Large" version. Moving forward, PelEX will only use the updated "Large" version as the default version. All existing accounts with access to a "Standard" version will see the new updated version of the report.

1.2. What is included in the HU Report?

The HU Report has been optimized to streamline data presentation for all use cases and clinical capacities. The report includes three pages: (1) Summary Dashboard, (2) Encounter Detail, and (3) High Utilization Detail.

The Summary Dashboard includes a data overview of patients from the past 6 months within a user specified date range. The Encounter Detail shows patient-level data, including demographics, encounter data, and attribution data.The High Utilization Detail shows patients by number of encounters and summarizes a historical account of encounters for the individual patient.

For additional details on the report pages, see Page 11.



1.3. Report Specifications

1.3.1. Report Period

The HU Report displays data on hospital encounters from the previous 6 months.

1.3.2. Data Sources

The data in the HU Report is based on EHR data contributed by hospitals participating in PelEX. For an up-to-date list of participating hospitals and the data they are contributing, please visit: https://pelexhie.org/our-network/.

Additionally, the HU Report includes information about patient enrollment in Medicaid Managed Care Organizations (MCOs) and attribution to primary care providers, based on weekly data supplied by the Louisiana Department of Health.

Each member's HU Report displays hospital encounters for their "patient panel." PelEX uses the patient data source provided by each member (i.e., EHR feed, patient list) to identify their patient panel.

1.3.3. Data Timeliness

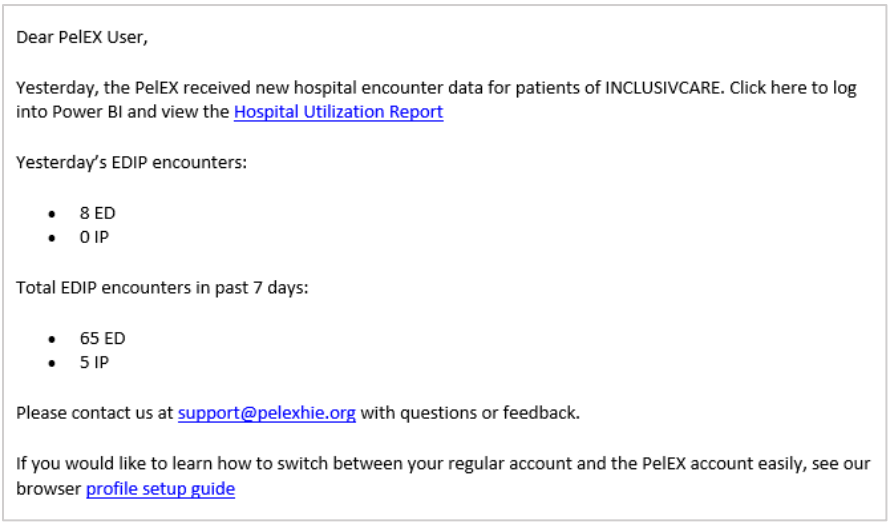
The HU Report data is automatically refreshed on a daily basis to include all data from the previous day up until the current day at 3am Central Time. The updated data will be displayed in the HU Report at around 8am Central Time each day. In the event of planned maintenance, there may be some delays. The PelEX team will notify users in advance of planned maintenance that will impact the HU Report.

1.4. Email Alerts Options

When new hospital encounter data has been added to the report, PelEX can send an automated email alert to users to notify them to check the HU 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
Alert me if there are any new encounters	1 or more encounters occurred on the previous day
Send me a weekly summary email with the # of ED and IP encounters in the previous 7 days	Weekly alert scheduled for every Wednesday morning
No email alerts at all	N/A

A sample email alert is pictured below:



Dear PelEX User,

Yesterday, the PelEX received new hospital encounter data for patients of INCLUSIVCARE. Click here to log into Power BI and view the Hospital Utilization Report

Yesterday's EDIP encounters:

- 8 ED
- 0 IP

Total EDIP encounters in past 7 days:

- 65 ED
- 5 IP

Please contact us at support@pelexhie.org with questions or feedback.

If you would like to learn how to switch between your regular account and the PelEX account easily, see our browser profile setup guide

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 PelEX 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, PelEX 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 our User Request Form by following the hyperlink. Depending on user permissions determined by your organization, users can access other PelEX reports 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 PelEX team has several ongoing security measures and requirements, described below, to ensure the privacy and security of protected health information contained in the HU Report.

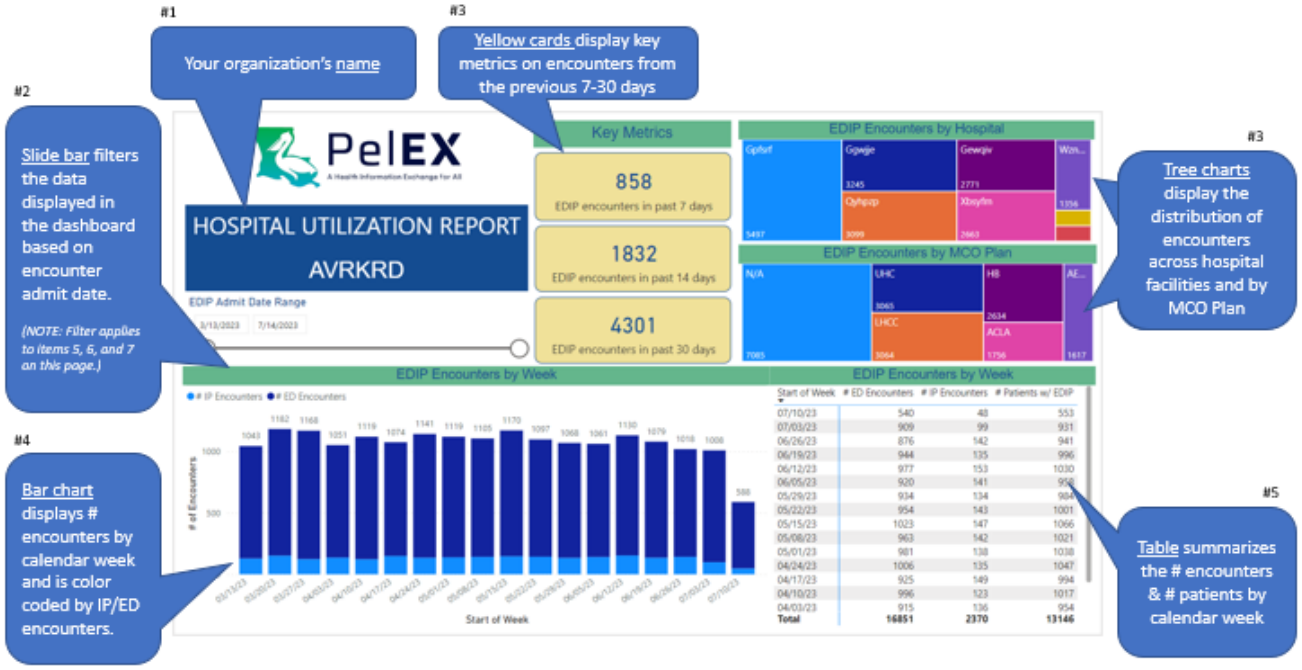
- **Two-Factor Authentication:** All users will be required to set up two-factor authentication upon logging in for the first time. This will prompt users to verify their identity every 7 days or whenever logging in on a new device. Detailed instructions and user tips are provided in section 2.2 of this user guide.
- **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 PelEX within 7 Days of User Transitions:** Member organizations should promptly inform the PelEX team if a user is leaving your organization or transitioning to a different role that does not require access to the HU Report. In accordance with the PelEX user access control policy, members must notify the PelEX team within 7 business days of a user's employment or contract ending. The PelEX team will promptly deactivate the user account to prevent unnecessary or unauthorized access to the HU Report.

3. Review of the HU Report Contents

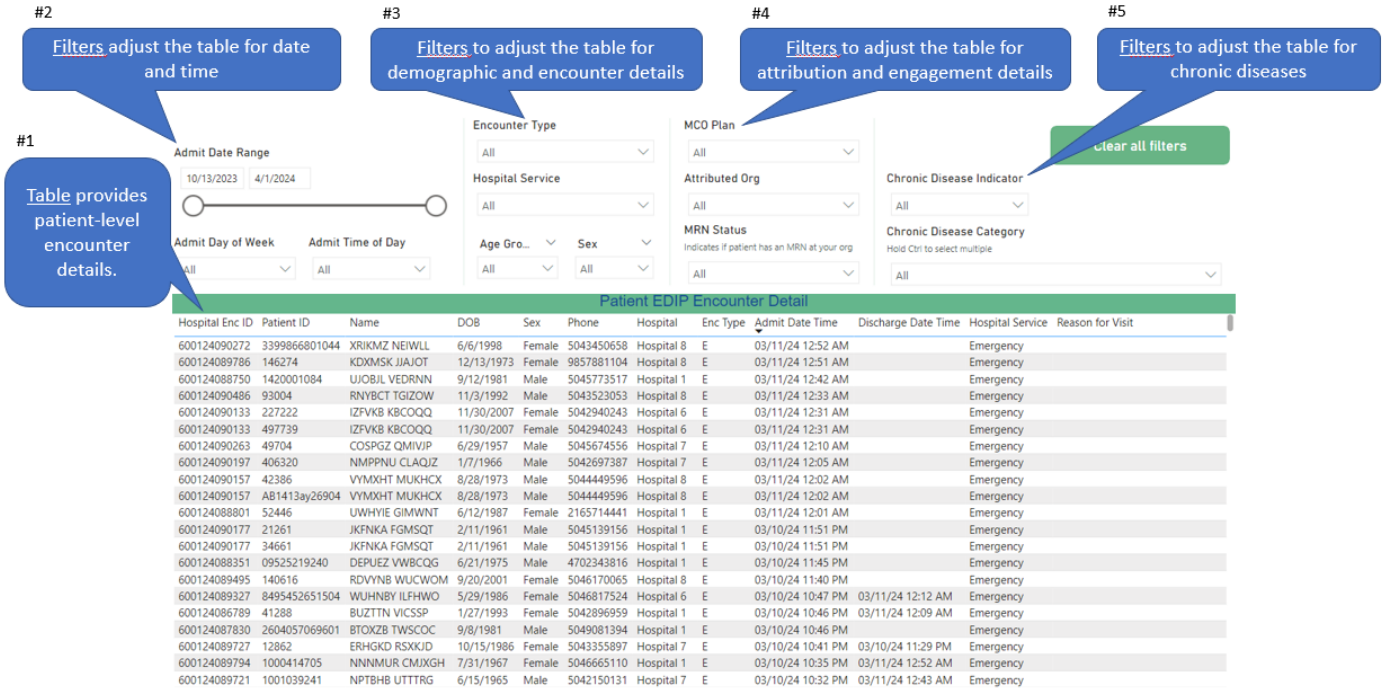
3.1. Overview of the HU Report Contents

The HU Report contains three pages: (1) Summary Dashboard, (2) Encounter Detail, and (3) High Utilization Detail. The sections below provide an overview of each page. The blue comment boxes describe the charts and other contents on each page of the Report. The numbers above each comment box represent the recommended order for reviewing the information to help you get oriented to the Report contents.

3.1.1. Summary Dashboard

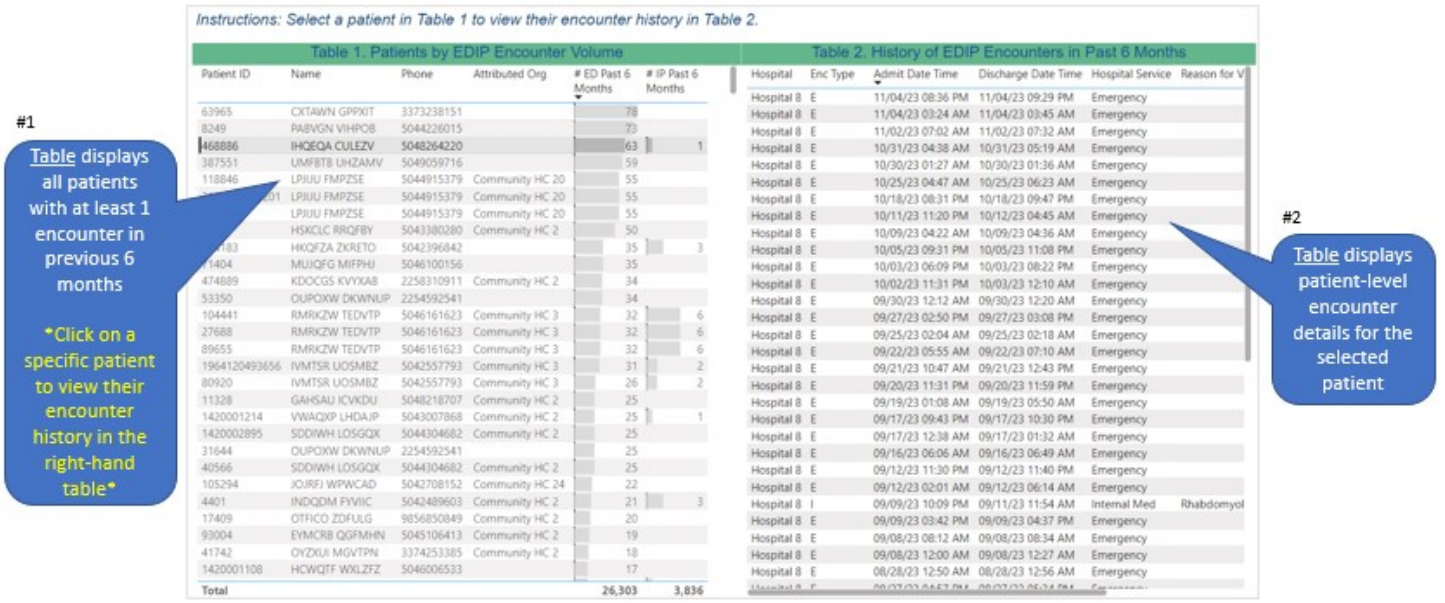


3.1.2. Encounter Details

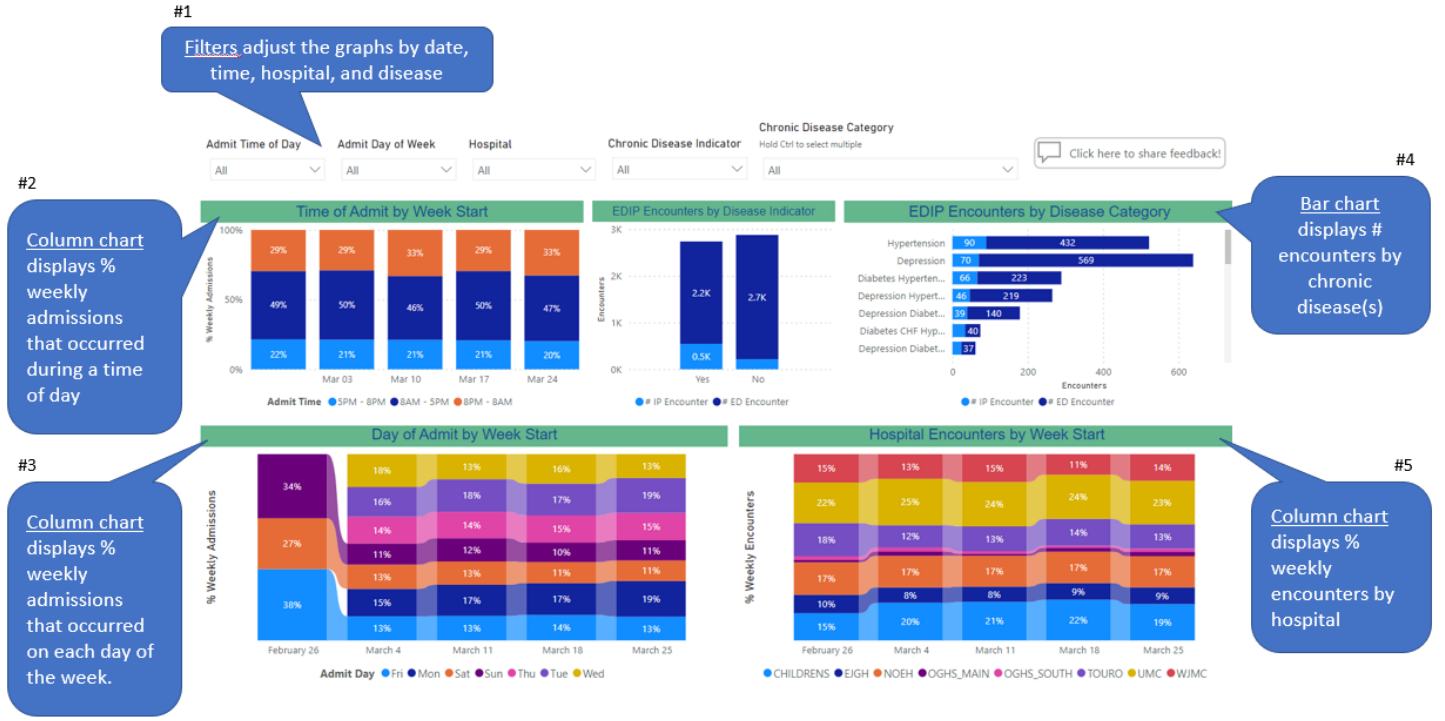


Hospital Enc ID	Patient ID	Name	DOB	Sex	Phone	Hospital	Enc Type	Admit Date Time	Discharge Date Time	Hospital Service	Reason for Visit
600124090272	3399866801044	XRIKMZ NEIWLL	6/6/1998	Female	5043450658	Hospital 8	E	03/11/24 12:52 AM		Emergency	
600124089786	146274	KDXMSK JJAJOT	12/13/1973	Female	9857881104	Hospital 8	E	03/11/24 12:51 AM		Emergency	
600124088750	1420001084	UJOBJL VEDRNN	9/12/1981	Male	5045773517	Hospital 1	E	03/11/24 12:42 AM		Emergency	
600124090486	93004	RNYBCT TGIZOW	11/3/1992	Male	5043523053	Hospital 8	E	03/11/24 12:33 AM		Emergency	
600124090133	227222	IZFVKB KBCOQQ	11/30/2007	Female	5042940243	Hospital 6	E	03/11/24 12:31 AM		Emergency	
600124090133	497739	IZFVKB KBCOQQ	11/30/2007	Female	5042940243	Hospital 6	E	03/11/24 12:31 AM		Emergency	
600124090263	49704	COSPGZ QMIVJP	6/29/1957	Male	5045674556	Hospital 7	E	03/11/24 12:10 AM		Emergency	
600124090197	406320	NMPPNU CLAQJZ	1/7/1966	Male	5042697387	Hospital 7	E	03/11/24 12:05 AM		Emergency	
600124090157	42386	VYMXHT MUKHCX	8/28/1973	Male	5044449596	Hospital 8	E	03/11/24 12:02 AM		Emergency	
600124090157	AB1413ay26904	VYMXHT MUKHCX	8/28/1973	Male	5044449596	Hospital 8	E	03/11/24 12:02 AM		Emergency	
600124088801	52446	UWHYIE GIMWNT	6/12/1987	Female	2165714441	Hospital 1	E	03/11/24 12:01 AM		Emergency	
600124090177	21261	JKFNKA FGMSQT	2/11/1961	Male	5045139156	Hospital 1	E	03/10/24 11:51 PM		Emergency	
600124090177	34661	JKFNKA FGMSQT	2/11/1961	Male	5045139156	Hospital 1	E	03/10/24 11:51 PM		Emergency	
600124088351	09525219240	DEPUEZ VWBCQG	6/21/1975	Male	4702343816	Hospital 1	E	03/10/24 11:45 PM		Emergency	
600124089495	140616	RDVYNB WUCWOM	9/20/2001	Female	5046170065	Hospital 8	E	03/10/24 11:40 PM		Emergency	
600124089327	8495452651504	WUHNBY ILFHWO	5/29/1986	Female	5046817524	Hospital 6	E	03/10/24 10:47 PM	03/11/24 12:12 AM	Emergency	
600124086789	41288	BUZTTN VICSSP	1/27/1993	Female	5042896959	Hospital 1	E	03/10/24 10:46 PM	03/11/24 12:09 AM	Emergency	
600124087830	2604057069601	BTOXZB TWSCOC	9/8/1981	Male	5049081394	Hospital 1	E	03/10/24 10:46 PM		Emergency	
600124089727	12862	ERHGKD RSXKJD	10/15/1986	Female	5043355897	Hospital 7	E	03/10/24 10:41 PM	03/10/24 11:29 PM	Emergency	
600124089794	1000414705	NNNMUR CMJXGH	7/31/1967	Female	5046665110	Hospital 1	E	03/10/24 10:35 PM	03/11/24 12:52 AM	Emergency	
600124089721	1001039241	NPTBHB UTTTRG	6/15/1965	Male	5042150131	Hospital 7	E	03/10/24 10:32 PM	03/11/24 12:43 AM	Emergency	

3.1.3. High Utilization Detail



3.1.4. Encounter Dashboard

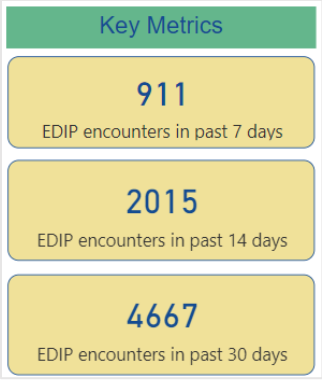


3.2. Detailed Review of HU Report Summary Data Visualizations

The sections below provide a deeper dive into the summary data visualization contents of the HU Report.

3.2.1. Key Metrics Cards

It is designed to help users quickly view the number of ED and IP encounters from the previous 7, 14, and 30 days. User may understand the scale and volume of encounters occurring at different lookback periods.



3.2.2. Slide Bar for Filtering the Date Range

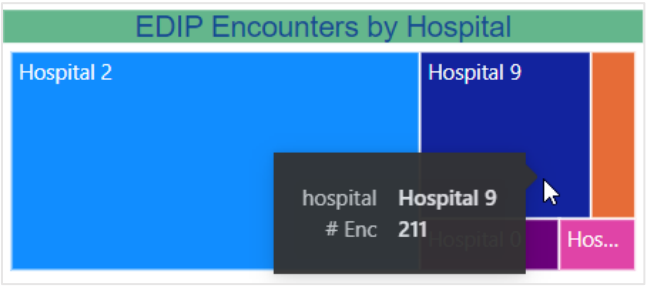
The slide bar is available on both the Summary Dashboard and Encounter Detail. It allows users to adjust the report period and focus on hospital encounters during a specific date range of interest, based on the encounter admit date. The default report period is 6 months. When users adjust the slide bar, the contents of the page will be filtered to display encounters from the selected date range. Users can adjust the slide bar or manually enter the start and end dates of interest.

Note that the slide bar will modify the date range of all contents on the Summary Dashboard page *except* the Key Metrics Cards.

3.2.3. Hospital & MCO Plan Distribution Tree Charts

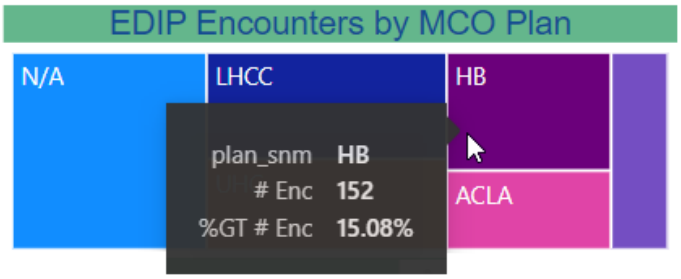
The hospital tree chart illustrates the distribution of EDIP encounters across multiple hospital facilities, based on where the encounters occurred. The MCO Plan tree chart illustrates the distribution of EDIP encounters across Medicaid Managed Care Organizations (MCOs), based on patient enrollment in each MCO plan. The charts are designed to provide a quick visual indication of where most of the encounters are occurring.

Users can hover over each segment of the hospital tree chart to see the exact number of EDIP encounters that occurred at each hospital during the report period, as shown in the black box below. Users can also click on a specific hospital in the chart to filter the contents of the page to display hospital encounters from the selected hospital only.



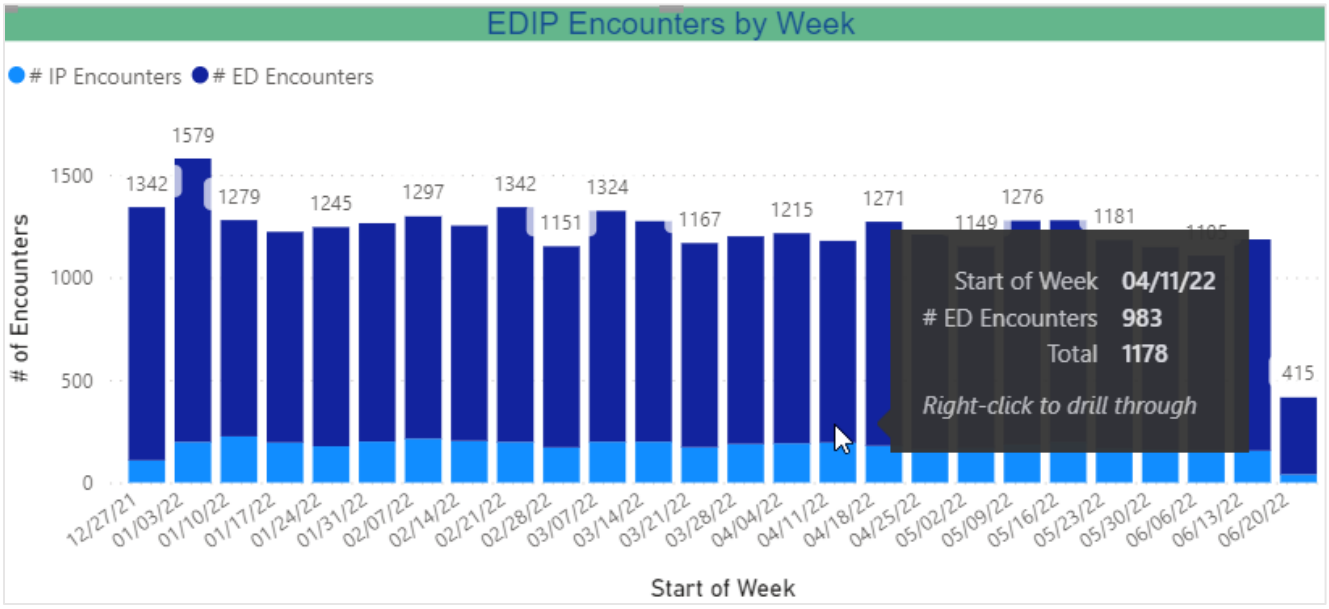
Likewise, users can hover over segments of the MCO Plan Distribution chart to see number of EDIP encounters of patients attributed to the respective MCO plan during the report period, as shown in the black box below. Additionally, users can see the percent of total encounters that are associated to the selected MCO plan. Clicking on the specific MCO plan will filter the contents of the page to display hospital encounters for patients enrolled in the selected MCO plan only.

Patients who are not enrolled in a Medicaid plan are categorized under the "N/A" segment (i.e., not applicable).



3.2.4. Bar Chart of EDIP Encounters by Week

It displays the number of hospital encounters by week (based on the Monday start date of each week) and color-coded by encounter type (ED or IP). Users can hover over each colored segment of a bar to view the exact number of ED or IP encounters that occurred in a given week, as shown in the black box below. The total number of encounters is displayed at the top of each bar.



3.2.5. Table of EDIP Encounters and Notifications by Week

This table displays the number of ED encounters, IP encounters, and unique patients with an ED or IP encounter by calendar week (based on the Monday start of week).

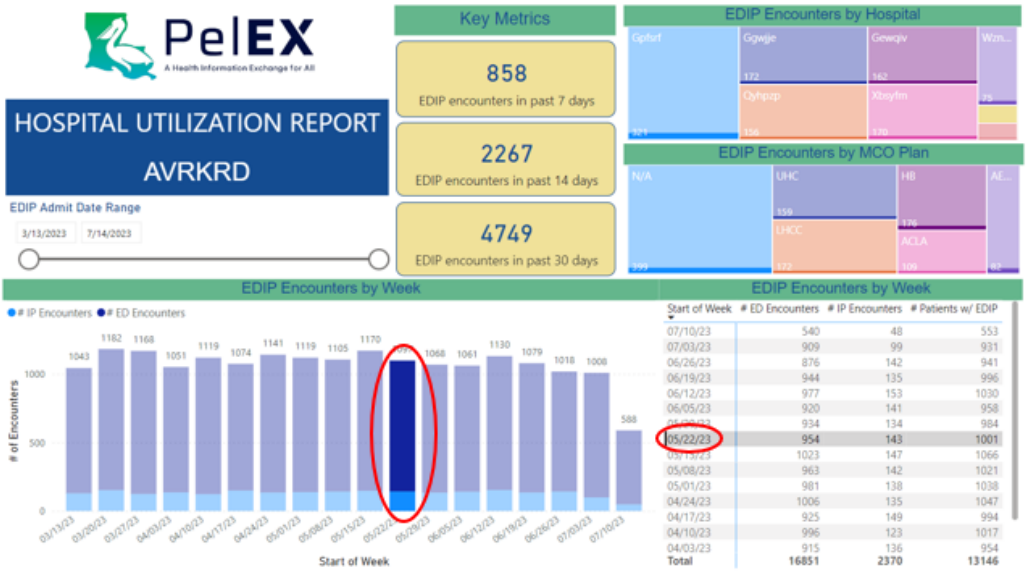
EDIP Encounters by Week

Start of Week	# ED Encounters	# IP Encounters	# Patients w/ EDIP
06/20/22	375	40	396
06/13/22	1030	155	1089
06/06/22	947	158	1013
05/30/22	985	162	1049
05/23/22	1013	168	1075
05/16/22	1079	199	1166
05/09/22	1089	187	1151
05/02/22	978	171	1078
04/25/22	1044	164	1121
04/18/22	1092	179	1145
04/11/22	983	195	1094
04/04/22	1024	191	1136
03/28/22	1012	188	1078
03/21/22	995	172	1067
Total	**26930**	**4616**	**19382**

4. Useful Features & Tips

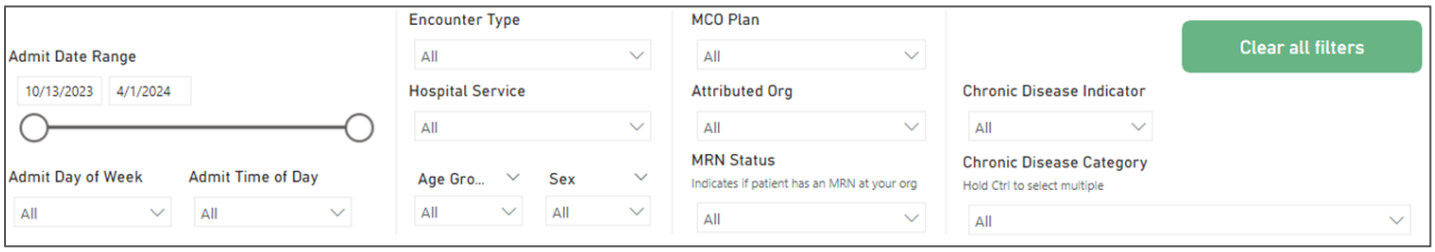
4.1. Interactive Summary Dashboard

The Summary Dashboard is a highly interactive dashboard that can allow you to click on various pieces of the dashboard to highlight and manipulate data displayed on this page. Users can select a data visual on the bar chart, encounter table, or either tree chart to highlight and manipulate data based on that selection.



4.2. Using the Filters Toolbar

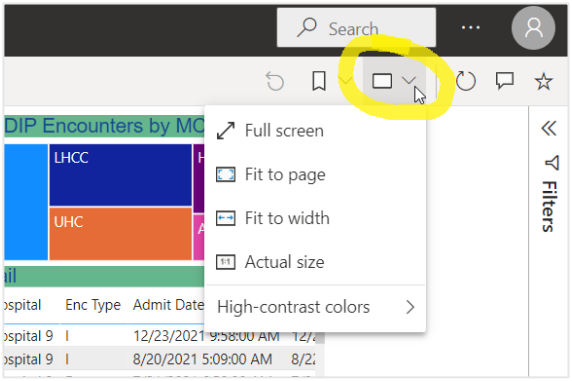
The filters toolbar is only available on the Encounter Detail page. This toolbar features five common filters used for sorting, identifying, and narrowing the encounter list to a pertinent set of patients. Users have multiple options for filtering the data, from left to right:

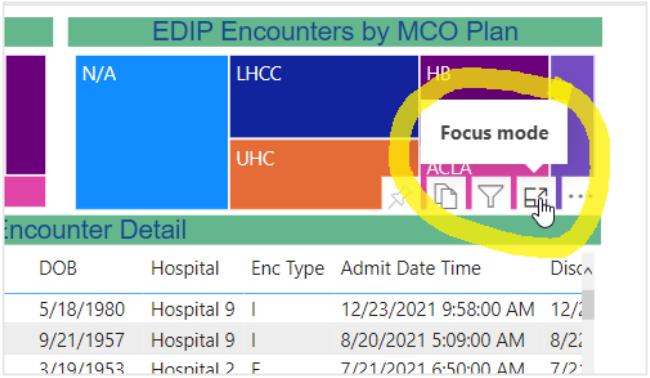


1. "Admit Date Range" uses a slide bar filter to select a date range by dragging the circular indicators or manually entering the Start and End for Admit dates.
2. "Admit Day of the Week" dropdown to select a day of the week.
3. "Admit Time of Day" dropdown to select day (8am to 5pm), evening (5pm – 8pm), and overnight (8pm – 8am).
4. "Encounter Type" dropdown to select either Inpatient (IP) or Emergency Department (ED)
5. "Hospital Service" dropdown to select the service department where the encounter occurred.
6. "Age Group" dropdown to select ages 0-17, 18-39, 40-64, 65-74, and over 75.
7. "Sex" dropdown to select "Male", "Female", or "Unknown."
8. "MCO Plan" dropdown to select one of the Managed Care Organizations that patients are attributed to
9. "Attributed Org" dropdown to select organization(s) the patient is attributed to.
10. "MRN Status" dropdown to select patients who have an MRN at your organization or do not have an MRN but are attributed to your organization.
11. "Chronic Disease Indicator" dropdown to select either "Yes" or "No" if a patient has had a historical chronic disease diagnosis.
12. "Chronic Disease Category" dropdown to select any one or combination of five chronic diseases, which include hypertension, congestive heart failure (CHF), chronic obstructive pulmonary disease (COPD), diabetes, and depression.

4.3. Changing the Page View or Size

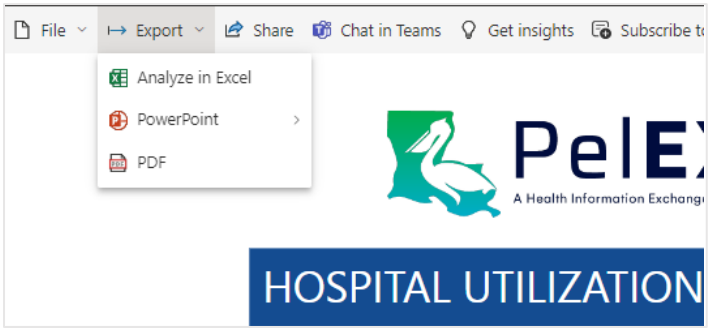
To modify the size of the HU Report, click on the "View" icon in the top right corner of the webpage and choose from a range of view options (as pictured below on the left). Users can also enlarge a specific chart within the HU Report by hovering over the chart and clicking on the "Focus mode" icon (as pictured below on the right).



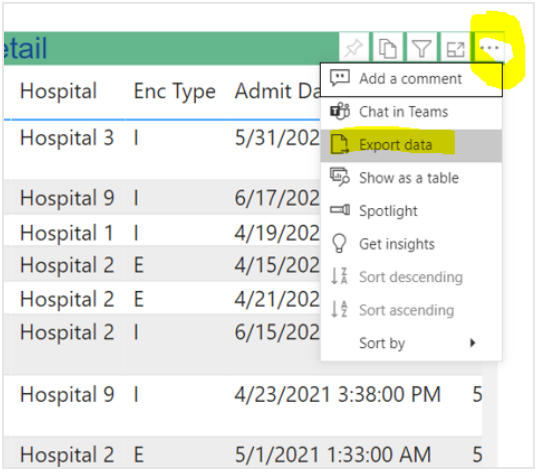


4.4. Exporting to Excel, PDF, or PowerPoint

Users can export the HU Report to Excel, PDF, or PowerPoint. The full contents of the Report can be exported to PDF or PowerPoint by clicking on the "Export" icon in the top left corner of the webpage (as pictured below).



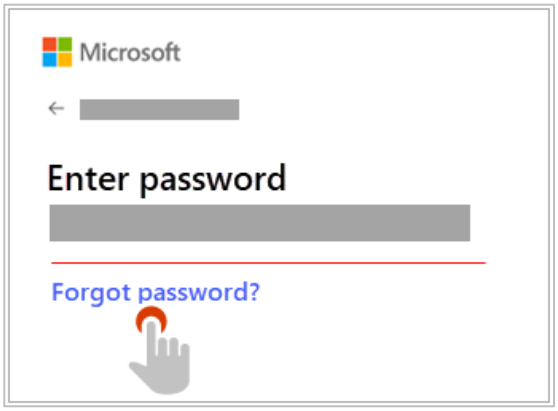
Individual charts can be exported to Excel. Hover above a chart, click on the icon with the three dots, and then click "Export data" (as pictured below). The data displayed in the chart can be exported in .xls or .csv format.



5. Troubleshooting

5.1. I forgot my password

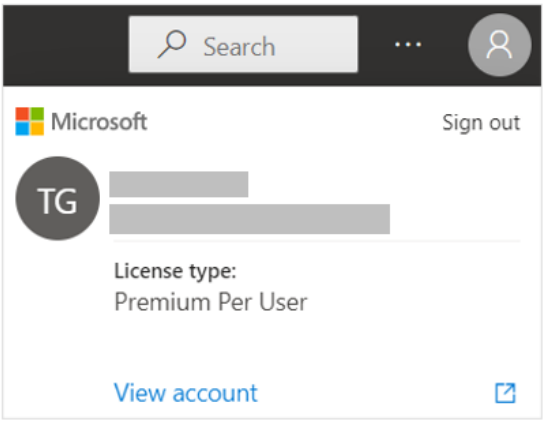
If you have forgotten your password, then you will need to reset your password. To reset your password, open the login page and at the bottom of the dialog box click the link that says, "Forgot my password." Then, Microsoft will ask you to verify your identity through the multi-factor authentication (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 PelEX account. Check the user profile in the top right corner (as seen to the right). The PelEX 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.

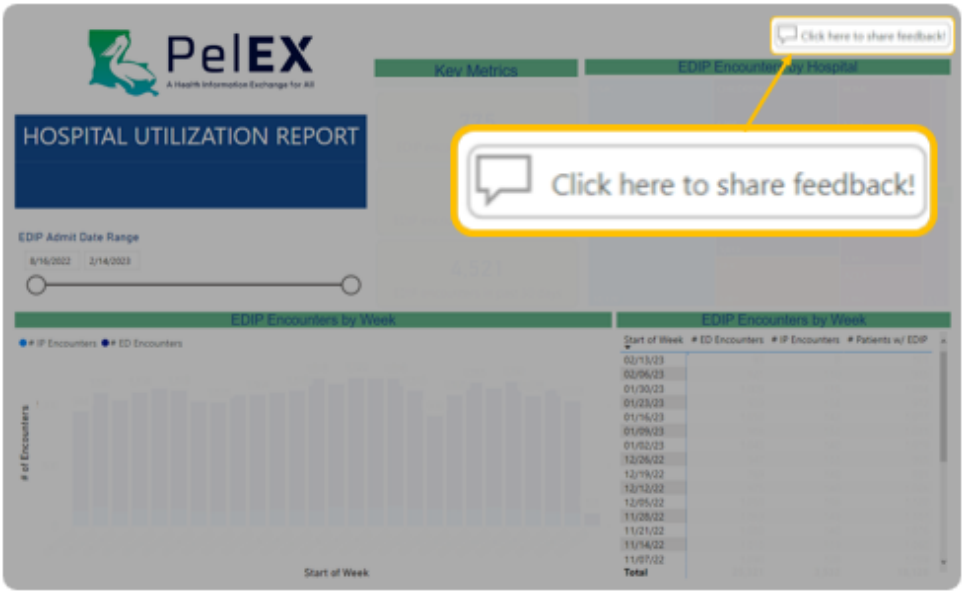
To avoid this happening in the future, the team recommends creating a dedicated browser profile for PelEX reports to easily switch Microsoft accounts through your preferred internet browser. The setup guide can be found here.

5.4. My report is not updated/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 PelEX 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 HU 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 Summary Dashboard page, as pictured below.