

**HPMS**

Program of  
All Inclusive  
Care for the  
Elderly

User's Guide

Produced by:  
Centers for Medicare & Medicaid Services  
Center for Beneficiary Choices  
Medicare Plan Accountability Group  
Division of Health Plan and Provider Data

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## INTRODUCTION

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In order to comply with the PACE regulation, §460.140 and §460.200, all PACE Organizations must meet external quality assessment and reporting requirements as specified by CMS and the State Administering Agency. These requirements are contained in your program agreement that will be signed at time of permanent provider application approval.

The PACE quality data elements will be reported to CMS using the Health Plan Management System (HPMS), an information system and data exchange mechanism for Medicare managed care organizations (MCO), including PACE organizations. CMS requires that HPMS is accessed by means of the Medicare Data Communications Network (MDCN), a secure network maintained by AT&T Global Network Services (AGNS) on behalf of CMS. Please see the *HPMS Connectivity Instructions* document for information/options about connecting to AGNS to access the HPMS.

### HPMS PACE Organization Monitoring Functionality

The Health Plan Management System (HPMS) PACE Organization Monitoring Module provides each PACE organization with the capability to enter certain data required by the Centers for Medicare & Medicaid Services (CMS) and the State Administering Agency (SAA) to monitor the performance of their organization. The PACE Organization Monitoring function is also intended to provide CMS and SAA users with the capability to track and monitor data related to nine key indicators for all PACE organizations.

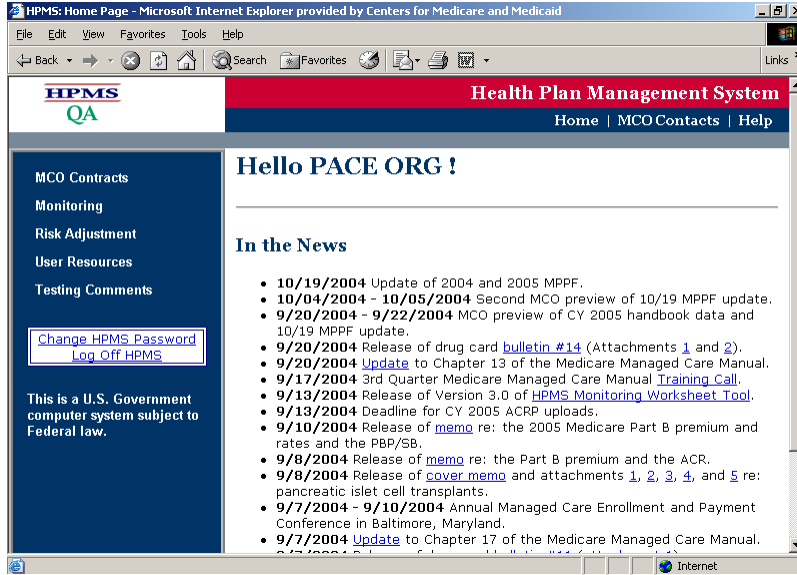
The PACE Monitoring Module allows one or more PACE organization representatives to enter and edit data for each H Number. (The H Number is the internal CMS identification number used for all managed care contracts, and is identified in each executed PACE program agreement.) An H Number may have one or more sites, and the PACE Monitoring Module provides the capability for data to be entered separately at each site.

PACE data submitted through the PACE Monitoring Module must come exclusively from a PACE site, not the parent organization. If the PACE organization has more than one site of care/treatment, **each site must be identified separately**. PACE organizations are required to report their information quarterly. This timeframe is most useful in determining and monitoring trends and patterns of care and will coincide with the reporting of financial data. CMS and the State Agencies will use these monitoring data to identify potential problems, aberrant outcomes, or unusual events that may be the first indication of problems in patient care, site operations, or financial solvency. These data elements will be used to determine if additional onsite monitoring activities by CMS or the State are necessary.

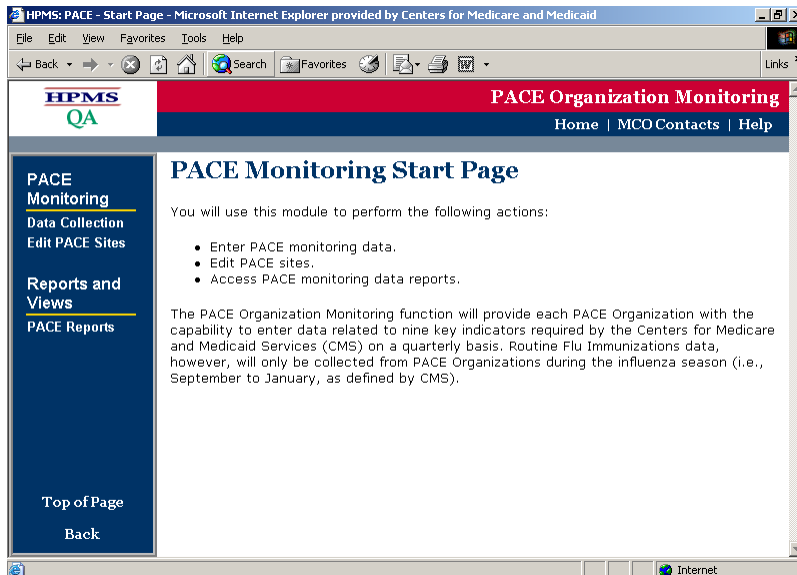
This guide will provide PACE organization users with guidance with entering data, printing reports, and navigating through the various screens and functions contained within the module.

# HPMS PACE START PAGE

Below is the HPMS home page. This is the first page that will appear once the user has logged into the HPMS system. The user should click on the PACE Monitoring link in the left navigation bar to enter the PACE module.



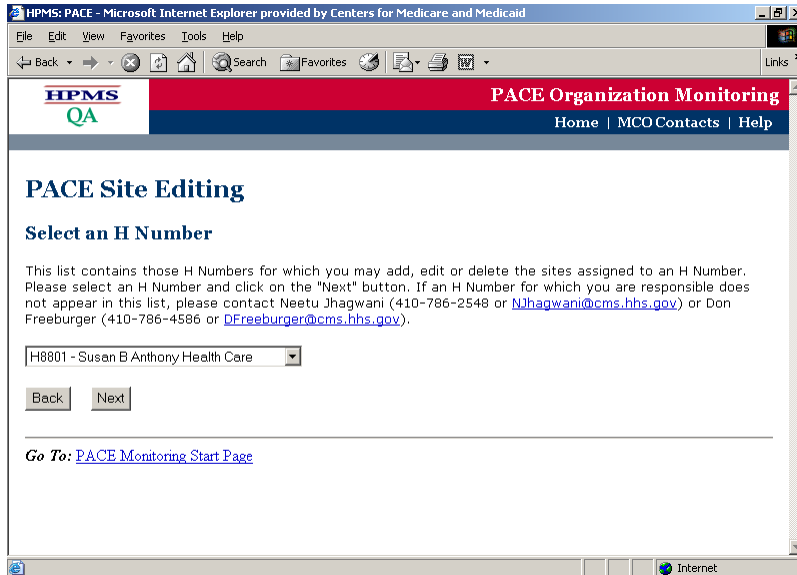
Once the user has selected the PACE monitoring link, the user will be taken to the PACE Monitoring Start Page. From this page, the user can add, edit, or delete a PACE site, enter data, view a report, log off the HPMS, or return to the HPMS home page.



## PACE SITE EDITING – ADDING, EDITING, AND DELETING A PACE SITE SELECT AN H NUMBER SCREEN

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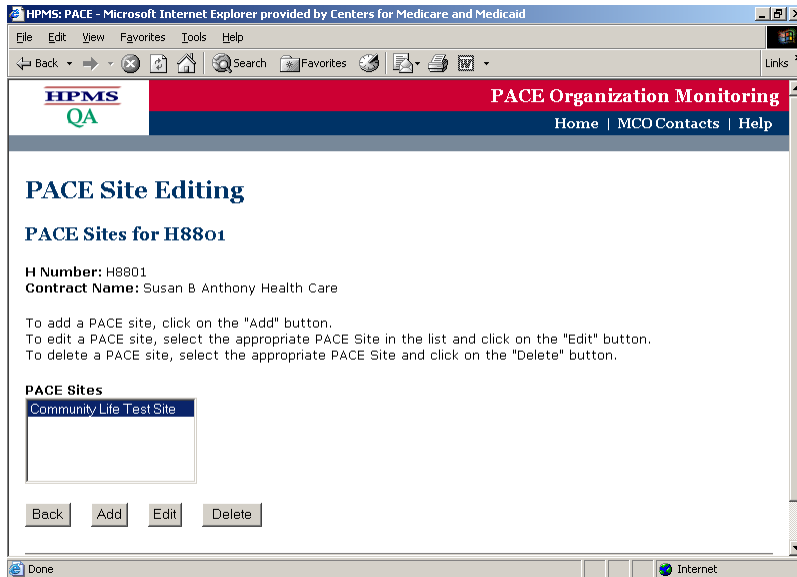
The PACE Site Editing – Select an H Number screen displays the list of H Numbers assigned to the user based on the PACE Organization affiliation. The user selects the H Number for which they would like to enter data and clicks on the “Next” button. This functionality is the same whether the user wishes to add, edit, or delete a PACE site.



## PACE SITE EDITING - PACE SITES FOR...

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This screen will display the H Number selected by the user as well as a list of existing sites for this PACE organization. The user will highlight the PACE site for which they intend to enter data and select the appropriate button. The user can select from the add, edit, or delete a PACE site functions, or select the Back button to return to the previous page.



## PACE SITE EDITING –ADD A PACE SITE

---

To add a PACE site, select the ADD button on the PACE Site Editing screen (note, do not highlight an existing PACE site if you wish to add a new site), and the following PACE SITE Editing – Add a PACE Site screen will appear. Enter data as necessary. Please note that the Begin Data Collection quarter will be pre-filled with the current reporting quarter. *Unless otherwise instructed, it is suggested that you leave this field unchanged.* When complete, click the SUBMIT button.

The screenshot shows a web browser window with the title "PACE Organization Monitoring". The page header includes the HPMS QA logo and navigation links for Home, MCO Contacts, and Help. The main heading is "PACE Site Editing" with a sub-heading "Add a PACE Site". A note states: "Please note that required fields are indicated with an asterisk (\*)." Below this, the form displays pre-filled information: "H Number: H8801" and "Contract Name: Susan B Anthony Health Care". The form fields are as follows:

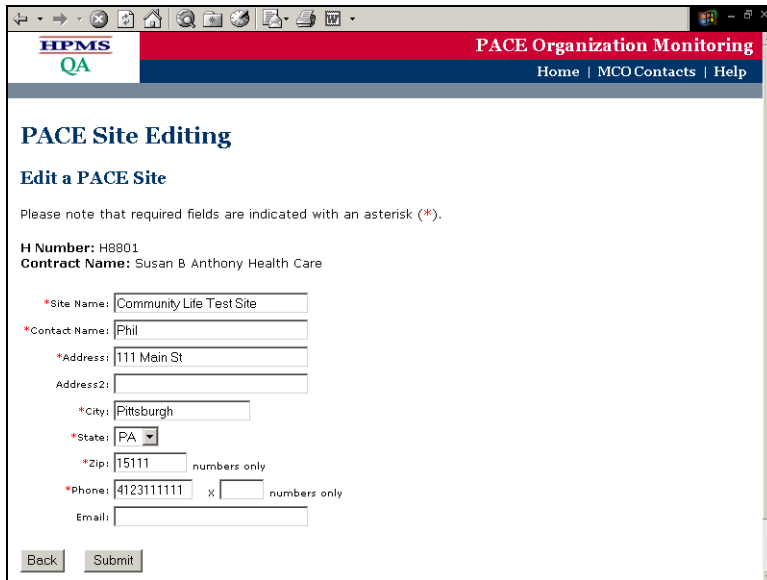
- \*Site Name:
- \*Contact Name:
- \*Address:
- Address2:
- \*City:
- \*State:
- \*Zip:
- \*Phone:  (with a note "numbers only")
- Email:
- \*Begin Data Collection:

There are several dropdown menus for quarters, with "3rd Quarter, 2004" selected in the "Begin Data Collection" field.

## PACE SITE EDITING - EDIT A PACE SITE

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To edit a PACE site, select the PACE site you wish to edit, and select the EDIT button on the PACE Site Editing screen. The following PACE SITE Editing – Edit a PACE Site screen will appear. Edit data as necessary. Please note that the Begin Data Collection field cannot be edited. When complete, click the SUBMIT button.



The screenshot shows a web browser window with the following content:

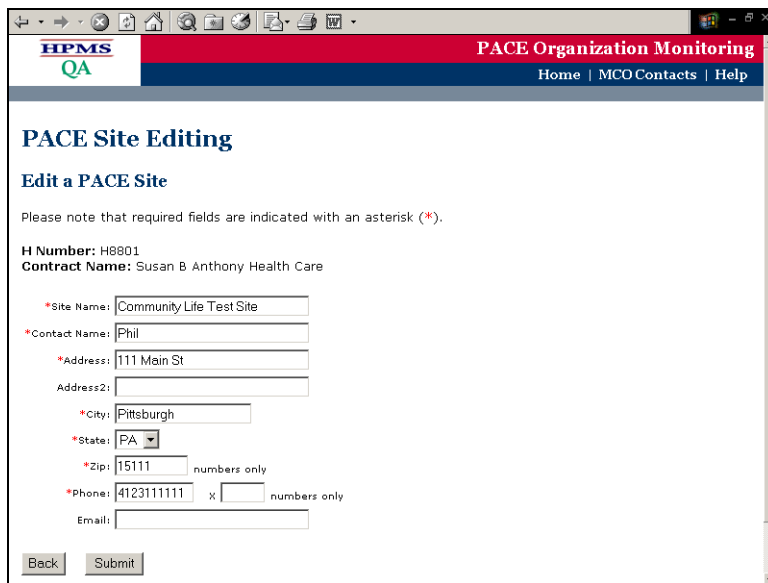
- HPMS QA** logo in the top left corner.
- PACE Organization Monitoring** title in the top right corner.
- Navigation links: [Home](#) | [MCOContacts](#) | [Help](#)
- PACE Site Editing** section header.
- Edit a PACE Site** sub-header.
- Instruction: Please note that required fields are indicated with an asterisk (\*).
- Display information: **H Number:** H8801, **Contract Name:** Susan B Anthony Health Care
- Form fields with asterisks indicating they are required:
  - \*Site Name:
  - \*Contact Name:
  - \*Address:
  - Address2:
  - \*City:
  - \*State:
  - \*Zip:  numbers only
  - \*Phone:  x  numbers only
  - Email:
- Buttons:  and



## PACE SITE EDITING - DELETING A PACE SITE

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To delete a previously entered PACE site, select the PACE site you wish to delete.

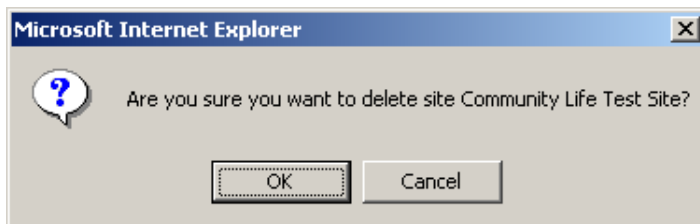


The screenshot shows a web browser window with the title "PACE Organization Monitoring". The page header includes the HPMS QA logo and navigation links for Home, MCO Contacts, and Help. The main content area is titled "PACE Site Editing" and "Edit a PACE Site". A note states: "Please note that required fields are indicated with an asterisk (\*)." Below this, the form displays the following information and fields:

- H Number: H8801
- Contract Name: Susan B. Anthony Health Care
- \*Site Name: Community Life Test Site
- \*Contact Name: Phil
- \*Address: 111 Main St
- Address2: (empty)
- \*City: Pittsburgh
- \*State: PA (dropdown menu)
- \*Zip: 15111 numbers only
- \*Phone: 4123111111 x (empty) numbers only
- Email: (empty)

At the bottom of the form are "Back" and "Submit" buttons.

Once you have selected the site, select the DELETE button. The following message will appear:

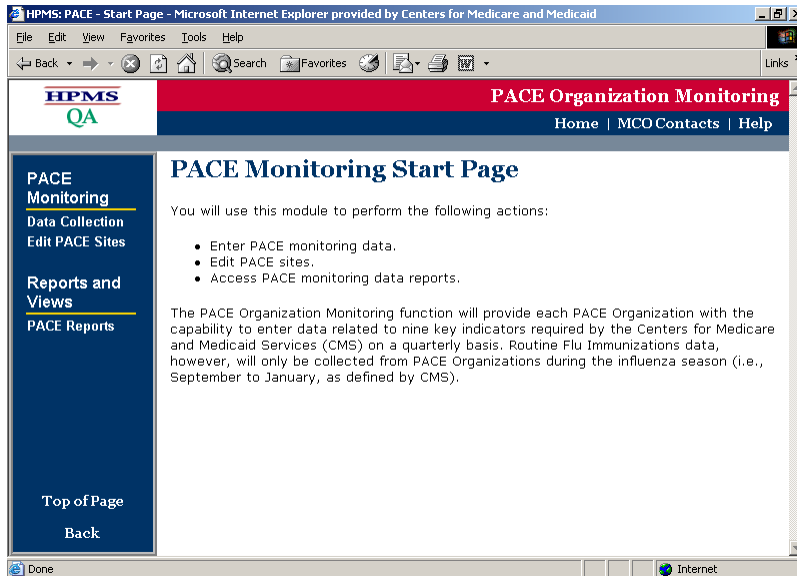


Select OK, and the site will be deleted.

## PACE MONITORING - ENTERING PACE DATA

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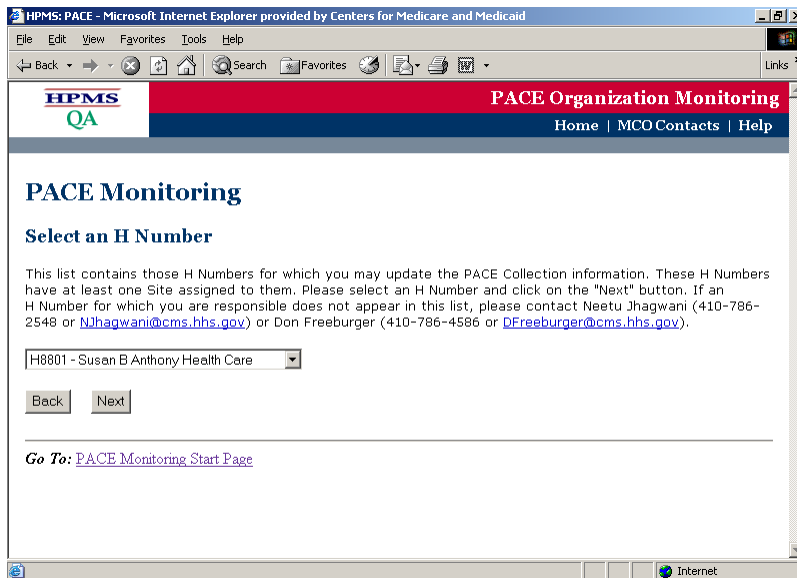
To enter data for a PACE site, select the Data Collection link from the PACE Start Page.



## PACE MONITORING - SELECT AN H NUMBER

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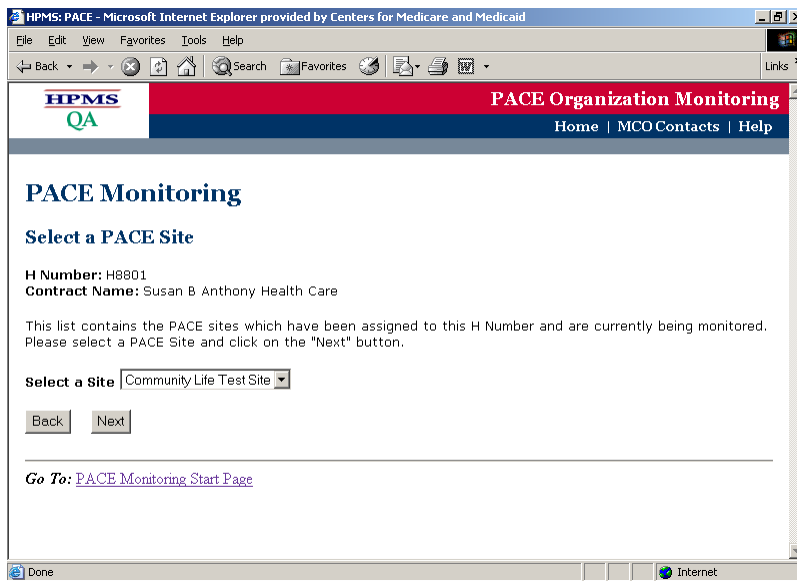
From the Select an H Number screen, select your organization's H number, and select the NEXT button.



## PACE MONITORING - SELECT A PACE SITE

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From the Select a PACE Site screen, select the site you wish to enter data for, and select NEXT.



## PACE MONITORING - SELECT A DATA COLLECTION PERIOD ENTER TOTAL # OF PARTICIPANTS

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Once a site is selected, the user must then select a data collection quarter. Generally, only the current data collection quarter will be displayed for selection, but because CMS may allow the plan to enter or edit data after a data collection period has ended, there may be more than one data collection quarter displayed for selection. You may also see the Flu Immunizations function, as that data is entered separately from the remaining quality indicators.

On the Select a Data Collection Period screen, the currently available collection periods will be highlighted in blue text. The user is required to enter the correct Total Number of Participants at the End of the Collection Period for any currently open collection periods. When complete, click on the SUBMIT button to proceed.

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS QA logo and "PACE Organization Monitoring" with navigation links for Home, MCO Contacts, and Help. The main heading is "PACE Monitoring" followed by "Select a Data Collection Period".

Metadata displayed includes:  
H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Community Life Test Site

Instructions: "You may use this page to select a data collection period. Only data collection periods open for data entry will be displayed for selection. You must first enter the Total Number of Participants at the End of the Collection Period and select the 'Submit' button. Once the Total Number of Participants at the End of the Collection Period is submitted, select the appropriate Data Collection Period link to begin entering the data."

Collection Period	Reporting Period	End Data Collection Date	Total Number of Participants at the End of the Collection Period
<a href="#">3rd Quarter, 2004 (Jul. - Sep.)</a>	3rd Quarter, 2004	10/31/2004	<input type="text" value="0"/>
<a href="#">Flu Immunization, Sep. 2004 thru Jan. 2005</a>	1st Quarter, 2005	2/28/2005	<input type="text" value="0"/>

## PACE MONITORING - SELECT A DATA COLLECTION PERIOD ENTER TOTAL # OF PARTICIPANTS - FOR ALL PERIODS!

---

The PACE module will check to ensure that the user has entered participant number data for ALL Collection Periods available. Please ensure that you have entered the correct Number of Participants for all highlighted Collection Periods. When complete, select the SUBMIT button.

**HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid**

File Edit View Favorites Tools Help

HPMS QA **PACE Organization Monitoring**  
Home | MCO Contacts | Help

### PACE Monitoring

#### Select a Data Collection Period

H Number: H8801  
Contract Name: Susan B Anthony Health Car  
PACE Site: Community Life Test Site

You may use this page to select a data collection period to be displayed for selection. You must first enter a reporting period and select the "Submit" button. Once a reporting period is submitted, select the appropriate data collection period.

Collection Period	Reporting Period	End Data Collection Date	Total Number of Participants at the End of the Collection Period
<a href="#">3rd Quarter, 2004 (Jul. - Sep.)</a>	3rd Quarter, 2004	10/31/2004	0
<a href="#">Flu Immunization, Sep. 2004 thru Jan. 2005</a>	1st Quarter, 2005	2/28/2005	0

Microsoft Internet Explorer

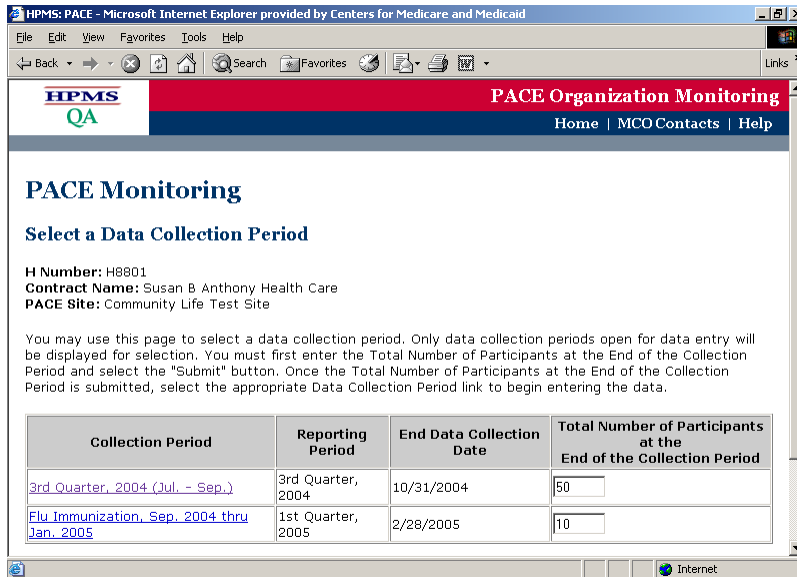
Invalid Number of Participants entered for 3rd Quarter, 2004 (Jul. - Sep.). Total Participants must be greater than 0 before data can be collected.

OK

## PACE MONITORING - SELECT A DATA COLLECTION PERIOD

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Once the Total Number of Participants is entered, the user can highlight a quarter and advance to the Select a PACE Quality Indicator Selection screen, or select the “Back” button to return to the Select a Site screen.



HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid

HPMS QA PACE Organization Monitoring  
Home | MCO Contacts | Help

### PACE Monitoring

#### Select a Data Collection Period

H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Community Life Test Site

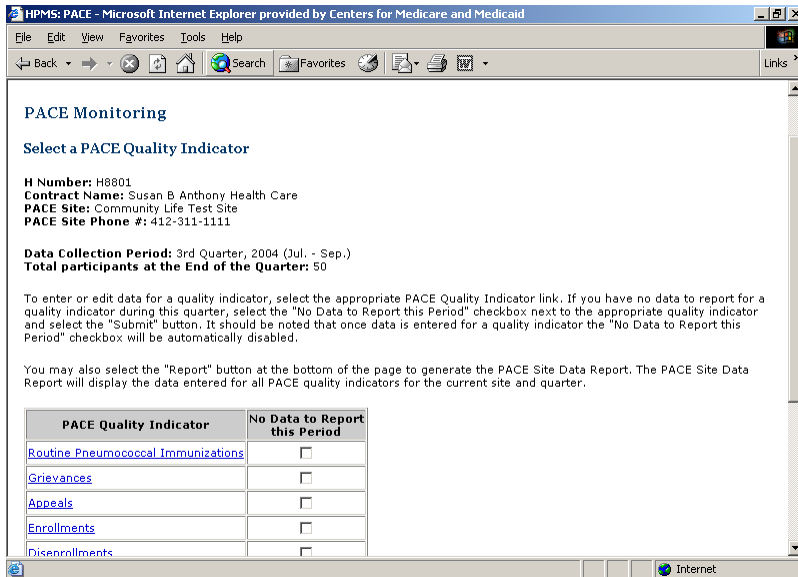
You may use this page to select a data collection period. Only data collection periods open for data entry will be displayed for selection. You must first enter the Total Number of Participants at the End of the Collection Period and select the "Submit" button. Once the Total Number of Participants at the End of the Collection Period is submitted, select the appropriate Data Collection Period link to begin entering the data.

Collection Period	Reporting Period	End Data Collection Date	Total Number of Participants at the End of the Collection Period
<a href="#">3rd Quarter, 2004 (Jul. - Sep.)</a>	3rd Quarter, 2004	10/31/2004	50 <input type="text"/>
<a href="#">Flu Immunization, Sep. 2004 thru Jan. 2005</a>	1st Quarter, 2005	2/28/2005	10 <input type="text"/>

# PACE MONITORING - SELECT A PACE QUALITY INDICATOR

## Select a PACE Quality Indicator Screen

Once a site is selected, the user can begin entering data for each of the PACE quality indicators being collected. Select one of the nine PACE Quality Indicators. If you do not have data to report or edit for a quality indicator, select the "No Data to Report this Period" check box, and select the Submit button to confirm. The "Submit" button will save any selections the user made to the "No Data to Report this Period" check boxes and returns the user to the Select a Quarter screen. If you make changes to the "No Data to Report this Period" check boxes and select the "Back" button, you will be prompted to save your changes.





## **PACE MONITORING - ROUTINE PNEUMOCOCCAL AND INFLUENZA IMMUNIZATIONS**

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The purpose of these measures is to provide information about the PACE participants who have received routine immunizations during a reporting year. Please note that while the Pneumococcal Immunizations screen will be available for all collection periods, the Influenza Immunizations screen will only be available during the Flu season, as defined to begin September 1, and end January 30 of the respective year.

### ***Data Reporting Requirements:***

#### **Influenza Immunization**

Number of participants who received an influenza (i.e., flu) immunization during the reporting year; (September 1 - January 30).

Number of participants who refused to take a flu immunization.

Number of participants NOT eligible for a flu immunization because it is medically contraindicated or prior immunized.

Total number of participants at the end of the month of January.

Calculation: Number of participants who received a flu immunization during the reporting period/(Total number of participants - Number of participants where flu immunization is medically contraindicated or prior immunized).

#### **Pneumococcal Immunization**

Number of participants who received a pneumococcal immunization in the last ten years.

Total number of participants at the PACE organization, including:

Number of participants not immunized for pneumococcal; and

Reason for not immunizing.

### ***Frequency:***

Routine immunization data will only be collected during the flu season (e.g. September 1 to January 30, as defined by CMS).

### ***How to use the measure:***

Compare the number of PACE participants who were enrolled during the reporting year to the number of participants who received routine immunizations (flu and pneumococcal) during the reporting year.

### ***Minimum Levels of Performance:***

Each PACE Organization is expected to achieve an immunization rate of eighty percent (80%) for both influenza and pneumococcal vaccinations for the participant population that is appropriate (Rate will exclude those participants who have had prior immunization or the vaccine is medically contraindicated).

## Data Entry Screens:

Flu Immunization data will be entered on the following screen. These data will be entered at the end of the January. The PACE organization user has until twenty days after the end of the month of January to enter the Flu Immunization information. At that time, information for the next quarter's data entry will be displayed.

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS QA logo and "PACE Organization Monitoring" with links for Home, MCO Contacts, and Help. The main content area is titled "PACE Monitoring" and "Routine Flu Immunizations". It displays the following information:

- H Number:** H8801
- Contract Name:** Susan B Anthony Health Care
- PACE Site:** Community Life Test Site
- Data Collection Period:** Flu Immunization, Sep. 2004 thru Jan. 2005

Instructions: "Enter the Number of participants who received or did not receive the flu immunization and click the 'Submit' button. If there is no Flu Immunization data to report, then select the 'No Data to Report for this Collection Period' checkbox and click the 'Submit' button."

**Total number of participants as of Jan. 30, 2005:** 10

**No data to report for this Data Collection Period:**

**Number of participants who RECEIVED the flu immunization:**

**Number of participants who did NOT receive the flu immunization**

**Medically Contraindicated:**

Pneumococcal Immunization data will be entered on the following screen. These data will be entered quarterly. The PACE organization user has until twenty days after the end of the quarter to enter the Pneumococcal Immunization information. At that time, information for the next quarter's data entry will be displayed.

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS QA logo and "PACE Organization Monitoring" with links for Home, MCO Contacts, and Help. The main content area is titled "PACE Monitoring" and "Routine Pneumococcal Immunizations". It displays the following information:

- H Number:** H8801
- Contract Name:** Susan B Anthony Health Care
- PACE Site:** Community Life Test Site
- Data Collection Period:** 3rd Quarter, 2004 (Jul. - Sep.)

Instructions: "Enter the Number of participants who received or did not receive the pneumococcal immunization and click the 'Submit' button."

**Total number of participants at the end of the quarter:** 50

**Number of participants who RECEIVED the pneumococcal immunization:**

**Number of participants who did NOT receive the pneumococcal immunization**

**Medically Contraindicated:**

**Prior Immunization:**

**Refused:**

# PACE MONITORING - ROUTINE PNEUMOCOCCAL IMMUNIZATIONS COUNTS CHECK

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Please note that as you enter data into the PACE module, the system will perform count checks, such as the one below, to ensure the accuracy of the data. If you receive an error message, follow the instructions to correct the error.

The screenshot shows a Microsoft Internet Explorer browser window displaying the HPMS PACE Organization Monitoring interface. The page title is "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The browser's address bar shows the URL "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page content includes the HPMS QA logo and navigation links for "Home", "MCO Contacts", and "Help".

The main content area is titled "PACE Monitoring" and "Routine Pneumococcal Immunizations". It displays the following information:

- H Number:** H8801
- Contract Name:** Susan B Anthony Health Care
- PACE Site:** Community Life Test Site
- Data Collection Period:** 3rd Quarter, 2004 (Jul. - Sep.)

Below this information, there is a text prompt: "Enter the Number of participants who received or did not receive the pneumococcal immunization and click the 'Submit' button." The "Total number of participants at the end of the quarter" is listed as 50.

The form includes the following input fields:

- Number of participants who RECEIVED the pneumococcal immunization:
- Number of participants who did NOT receive the pneumococcal immunization:
  - Medically Contraindicated:
  - Prior Immunization:
  - Refused:

An error message dialog box is overlaid on the bottom right of the browser window. The dialog box title is "Microsoft Internet Explorer" and it contains a yellow warning icon and the text: "Counts do not add up to the total number of participants." An "OK" button is located at the bottom of the dialog box.

## PACE MONITORING - GRIEVANCES AND APPEALS

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Grievances are defined as either written or oral expressions of dissatisfaction with service delivery or the quality of care provided by a PACE Organization. Appeals are defined as a written complaint due to non-coverage or non-payment of a service or item.

### *Data Reporting Requirements:*

Total number of participants.  
Source of each grievance or appeal (participant, family, caregiver, other with description).  
Date of initiation of each grievance or appeal.  
Date of resolution of each grievance or appeal.  
Description of each grievance or appeal.

### *Frequency:*

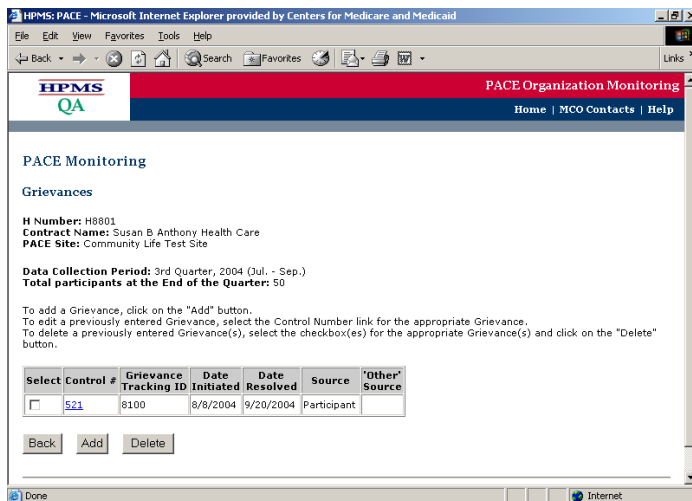
PACE Organizations will be asked to submit grievance and appeals data on a quarterly basis. Note, both grievances and appeals will be entered **once** the grievance or appeal **has been resolved**.

### *How to use the measure:*

It is expected that CMS and their State Agency partners will use these data to monitor trends and patterns. The number of grievances and appeals alone should not be viewed as an indicator of a problem. A high number of grievances could mean that participants are encouraged to speak up for themselves and voice their concerns.

### *Data Entry Screens:*

The Grievance and Appeals screens will display all grievances and appeals that have been resolved for this quarter. To delete a Grievance or Appeals record, select the checkbox next to each appropriate record and select the "Delete" button.



## PACE MONITORING - ADD GRIEVANCES AND APPEALS

To add one or more grievances or appeals records, select the “Add” button to advance to the appropriate data entry screen. The PACE organization user should enter a grievance or appeal only after it has been resolved. You can continue to enter grievance and appeals information until twenty days after the end of the quarter. At that time, information for the next quarter’s data entry will be displayed.

Specific grievances or appeals data will be entered on this screen. Each Grievance and Appeals entry will have a Control # which is generated by the system to track the record. Additionally, you may choose to enter your own Grievance Tracking ID or Appeals Tracking ID number. This field allows the user to track the grievances and appeals with their own internal ID system. The user would also enter the Date Initiated, Date Resolved, the Source, and a Description of the grievance or appeal. If the user selects "Other" as the source of the grievance or appeal, the associated text field will be enabled, and you can enter a source other than those listed for selection.

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes "HPMS QA" and "PACE Organization Monitoring" with navigation links for "Home", "MCO Contacts", and "Help". The main heading is "PACE Monitoring" followed by "Add Grievances".

Metadata displayed includes:  
H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Test

Data Collection Period: 2nd Quarter, 2002 (Apr. - Jun.)  
Total participants at the End of the Quarter: 100

Control #	Grievance Tracking ID	Date Initiated (mm/dd/yyyy)	Date Resolved (mm/dd/yyyy)	Source
224	55898	04/15/2002	05/20/2002	<input type="radio"/> Participant <input type="radio"/> Family <input type="radio"/> Care Giver <input checked="" type="radio"/> Other Test

Grievance Description:  
testing this description.

Buttons: Back, Submit

## PACE MONITORING - EDIT GRIEVANCES

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To edit a grievance or appeal, select the control number next to the entry. You will be taken to the Edit Grievances/Appeals screen. Select the Submit button when finished.

HPMS PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid

HPMS QA PACE Organization Monitoring  
Home | MCO Contacts | Help

### PACE Monitoring

#### Edit Grievances

H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Test

Data Collection Period: 2nd Quarter, 2002 (Apr. - Jun.)  
Total participants at the End of the Quarter: 100

Control #	Grievance Tracking ID	Date Initiated (mm/dd/yyyy)	Date Resolved (mm/dd/yyyy)	Source
223	15258	1/1/2002	4/15/2002	<input type="radio"/> Participant <input type="radio"/> Family <input type="radio"/> Care Giver <input type="radio"/> Other

Grievance Description  
None

Back Submit

## PACE MONITORING – ENROLLMENTS

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Enrollments are defined as individuals who have had an encounter with the PACE Organization and subsequently enrolled in the PACE program. Enrollment information is entered for each month by quarter.

### ***Data Reporting Requirements:***

Total number of participants.

Number of individuals who are enrolled in the program at the end of the month.

### ***How to use the measure:***

It is expected that CMS and their State Agency partners will use this data to monitor trends and patterns. The data will also be used to determine if there are accessibility issues and to determine if the PACE Organization has sufficient financial resources to conduct appropriate marketing activities. This information can also be used to evaluate the PACE Organization's ability to maintain an appropriate census.

### ***Data Entry Screens:***

You will enter the number of individuals enrolled in the PACE program at the end of each month, identified by payee. The months listed are based on the quarter and year. The PACE organization user can continue to enter Enrollment information until twenty days after the end of the data entry quarter. At that time, information for the next quarter's data entry will be displayed.

The screenshot shows a web browser window titled "HPMS PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS logo and "PACE Organization Monitoring" with navigation links for "Home", "MCO Contacts", and "Help". The main content area is titled "PACE Monitoring" and "Enrollments". It displays the following information:

- H Number: H0801
- Contract Name: Susan B. Anthony Health Care
- PACE Site: Community Life Test Site
- Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)
- Total number of participants at the end of the quarter: 50

Below this information is a table for data entry:

	July, 2004	August, 2004	September, 2004
Total Enrollments	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Under the table is a "Narrative Description" text area. At the bottom of the form are "Back" and "Submit" buttons. A footer link reads "Go To: PACE Monitoring Start Page | Select a Site".

## PACE MONITORING – DISENROLLMENTS

---

Disenrollments are defined as participants who left (i.e., disenrolled) the PACE program for reasons other than death.

### *Data Reporting Requirements:*

Total number of participants.

Number of involuntary disenrollments.

Number of voluntary disenrollments.

Reason for each involuntary disenrollment.

Reason for each voluntary disenrollment: If "Other" is selected, the user will also enter a text description.

### *How to use the measure:*

It is expected that CMS and their State Agency partners will utilize this information to determine if there are any problems with site operations, such as accessibility or provision of services, etc., which are causing voluntary disenrollments. In addition, this information can be used to review the organization's policies on involuntary disenrollments.

### *Data Entry Screens:*

Data on specific Disenrollments are entered on this screen. Each Disenrollment entry will have a Control # which is generated by the system to track the record. You will select the # of disenrollments by type, type of disenrollment, and select the Reason for Disenrollment. If you select "Other" as the reason for the disenrollment, the associated text field will be enabled, and you can enter a reason other than those listed for selection.

HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid

File Edit View Favorites Tools Help

Back Forward Stop Search Search Favorites

QA Home | NCO Contacts | Help

**PACE Monitoring**

Add Disenrollments

H Number: H8901  
Contract Name: Susan B. Anthony Health Care  
PACE Site: Community Life Test Site

Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)  
Total participants at the End of the Quarter: 50

Control #	# of Disenrollments	Type	Reason
362	12	<input type="radio"/> Involuntary <input checked="" type="radio"/> Voluntary	<input type="radio"/> Leaving or out of the service area for more than 30 consecutive days <input type="radio"/> Failure to pay premium <input type="radio"/> Disruptive or threatening behavior <input type="radio"/> No longer meets the State Medicaid facility level of care <input type="radio"/> Program agreement with CMS and the SAA is not renewed or terminated <input type="radio"/> Organization is unable to offer services due to the loss of State license or contract <input type="radio"/> Keep personal physician <input type="radio"/> Wishes to access out of network <input checked="" type="radio"/> Other

Narrative Description

Back Submit

Done Internet

You may aggregate any of your voluntary or involuntary disenrollments if the reasons are the same. However, the voluntary and the involuntary disenrollments must be separated.



To delete a Disenrollment record, select the checkbox next to each appropriate record and select the “Delete” button. To add one or more Disenrollment records, select the “Add” button to advance to the appropriate data entry screen. The PACE organization user can continue to enter disenrollment information until twenty days after the end of the quarter. At that time, information for the next quarter’s data entry will be displayed.

## PACE MONITORING – PROSPECTIVE ENROLLEES

---

Prospective enrollees are defined as potential participants who were interviewed and met the eligibility requirements but did not enroll in the PACE program.

### *Data Reporting Requirements:*

Indicate the "Reason" each potential participant did not enroll (e.g., Too Sick; Not Safe to Remain in the Community; Mental Health Concerns; Lack of Support Network; Requiring 24-hour Care; Preference for Own Physician; Preference for Other Health Care Provider or Institution; Financial Reason to Avoid Share of Cost; Unwilling to Comply with Treatment Plan; or Other). If "Other" is selected, the user will also enter a text description.

### *How to use the measure:*

This information can be utilized to determine if the PACE Organization is following the appropriate eligibility criteria and to determine if the organization is conducting appropriate marketing activities.

### *Data Entry Screens*

Data on all potential participants for the quarter is displayed on the Prospective Enrollees screen. To add one or more Prospective Enrollee records, select the "Add" button to advance to the appropriate data entry screen. To delete a Prospective Enrollee record, select the checkbox next to each appropriate record and select the "Delete" button. You will then enter the # of prospective enrollees by Reason and select the Reason for Not Enrolling. If you select "Other" as the reason for not enrolling, the associated text field will be enabled, and you can enter a reason other than those listed for selection.

Control #	# of Prospective Enrollees by Reason	Reason for Not Enrolling
523	1	<input checked="" type="radio"/> Too Sick <input type="radio"/> Not Safe to Remain in the Community <input type="radio"/> Mental Health Concerns <input type="radio"/> Lack of Support Network <input type="radio"/> Requiring 24-hour Care <input type="radio"/> Preference for Own Physician <input type="radio"/> Preference for Other Health Care Provider or Institution <input type="radio"/> Financial Reason to Avoid Share Cost <input type="radio"/> Unwilling to Comply with Treatment Plan <input type="radio"/> Other

Narrative Description

Back Submit

The PACE organization user can continue to enter prospective enrollee information until twenty days after the end of the quarter.

At that time, information for the next quarter's data entry will be displayed. You may aggregate any of your prospective enrollees data by reason, when the reasons given are the same.

## PACE MONITORING – READMISSIONS

Readmissions are defined as PACE participants admitted to an acute care hospital within 31 days.

### *Data Reporting Requirements:*

Total number of participants.

Number of participant hospital readmissions in a 31-day period (from discharge to readmit).

### *How to use the measure:*

CMS and State users will review those PACE participants with high usage to determine if intervention by the PACE Organization could have prevented some of the hospitalizations. Readmission for the same reason in a 31-day period could indicate that the length of stay is too short or that there is inadequate follow-up care by the PACE Organization. CMS and the State monitors will conduct quarterly comparisons to get a total picture of the care provided by the organization.

### *Data Entry Screens:*

Readmissions screen displays all readmissions that have been entered for this quarter. The PACE organization user will enter the number of readmissions that occurred within 31 days of release from the hospital on this screen.

HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid

HPMS QA PACE Organization Monitoring  
Home | MCO Contacts | Help

PACE Monitoring  
Readmissions

H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Community Life Test Site

Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)  
Total participants at the End of the Quarter: 50

To add a Readmission, click on the "Add" button.  
To edit a previously entered Readmission, select the Control Number link for the appropriate Readmission.  
To delete a previously entered Readmission(s), select the checkbox(es) for the appropriate Readmission(s) and click on the "Delete" button.

Select	Control #	# of Readmissions in the last 30 days	Admitting Diagnosis Code	Admitting Medical Diagnosis
<input type="checkbox"/>	542	5	642.5	Sickness followed by vomiting, wellness and more sickness

Back Add Delete

To add one or more readmissions records, select the "Add" button to advance to the appropriate data entry screen. To delete a readmissions record, select the checkbox next to each appropriate record and select the "Delete" button. Each readmission entry will have a Control number that is generated by the system to track the record. You will then enter the number of readmissions Admitting Medical Diagnosis.

**HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid**

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Links

**PACE Monitoring**

**Add Readmissions**

**H Number:** H8801  
**Contract Name:** Susan B. Anthony Health Care  
**PACE Site:** Community Life Test Site

**Data Collection Period:** 3rd Quarter, 2004 (Jul. - Sep.)  
**Total participants at the End of the Quarter:** 50

Control #	# of Readmissions in the last 30 days	Admitting Diagnosis Code
544	<input type="text"/>	<input type="text"/>

**Admitting Medical Diagnosis**

Back Submit

Done Internet

The Admitting Medical Diagnosis text field allows the user to enter up to 4000 characters. You can add the ICD-9 code or the narrative diagnosis. The PACE organization user can continue to enter readmission information until twenty days after the end of the quarter. At that time, information for the next quarter's data entry will be displayed. You may aggregate your readmissions when the diagnosis reason is the same.

## PACE MONITORING – EMERGENCY (UNSCHEDULED) CARE

---

Emergency (Unscheduled) Care is defined as PACE participants seen in the hospital emergency room (including care from a PACE physician in a hospital emergency department) or an outpatient department/clinic emergency.

### *Data Reporting Requirements:*

Total number of participants.

Specific reason including diagnosis (general diagnosis such as a fractured femur or ICD-9 code).

### *How to use the measure:*

CMS and State users will review those PACE participants with high usage to determine if intervention by the PACE Organization could have prevented some of the visits to the Emergency Room.

### *Data Entry Screens:*

The Emergency Care screen displays all emergency care incidents that have been entered for this quarter. To add one or more Emergency Care records, select the “Add” button to advance to the appropriate data entry screen. To delete an Emergency Care record, select the checkbox next to each appropriate record and select the “Delete” button. Each Emergency Care record will have a Control number that is generated by the system to track the record.

HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid

File Edit View Favorites Tools Help

Back Forward Search Favorites Links

QA Home | MCO Contacts | Help

PACE Monitoring

Add Emergency (Unscheduled) Care

H Number: H8801  
Contract Name: Susan B Anthony Health Care  
PACE Site: Community Life Test Site

Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)  
Total participants at the End of the Quarter: 50

Control #	# of Emergency (Unscheduled) Care
481	<input type="text"/>

General Diagnosis

Back Submit

Done Internet

You will then enter the # of emergency visits and the General Diagnosis. The General Diagnosis text field allows the user to enter up to 4000 characters. The PACE organization user can continue to enter emergency care information until twenty days after the end of the quarter. At that time, information for the next quarter’s data entry will be displayed. You may aggregate your emergency visits when the diagnosis reason is the same.

# PACE MONITORING – UNUSUAL INCIDENTS FOR PARTICIPANTS AND THE PACE SITE

---

Unusual incidents are defined as unanticipated circumstances, occurrences, or situations that have the potential for serious consequences for the participants. Examples include, but are not limited to: Falls at Home or the Adult Day Health Center; Falls while Getting into the Van; Van Accidents other than Falls; Participant Suicide or Attempted Suicide; Staff Criminal Records; Infectious or Communicable Disease Outbreaks; Food Poisoning; Fire or Other Disasters; Participant Injury that Required Follow-up Medical Treatment; Participant Injury on Equipment; Lawsuits; Medication Errors; and any type of Restraint Use. This is not an inclusive list, so we would expect PACE sites to submit quarterly information on any unanticipated situations that occur.

### ***Data Reporting Requirements:***

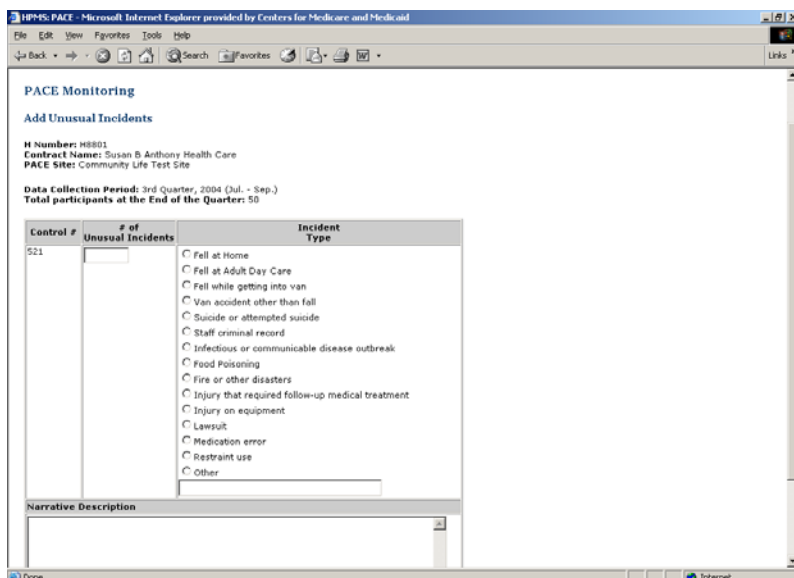
Total number of participants.  
Description of the incident.

### ***How to use the measure:***

CMS and State users will analyze categories focusing on whether these incidents were preventable, what steps were taken to resolve the problem, and what changes are being made to prevent or reduce the likelihood of reoccurrence. Is there a pattern that indicates a need for follow-up to investigate health and safety issues and procedures? Is this a program problem (e.g. negligence by staff) or a participant problem (e.g. verbal outbursts by participant with mental illness or severe dementia).

### ***Data Entry Screens:***

The Unusual Incident screen will display all unusual incidents that have been entered for this quarter. To add one or more Unusual Incident records, select the “Add” button to advance to the



appropriate data entry screen. To delete an Unusual Incident record, select the checkbox next to each appropriate record and select the "Delete" button. Each Unusual Incident record will have a Control number that is generated by the system to track the record. You will then enter the Incident Description. If you select "Other" as the incident description, the associated text field will be enabled, and you can enter an incident description other than those listed for selection. The Incident Description text field allows the user to enter up to 4000 characters. The PACE organization user can continue to enter unusual incident information until twenty days after the end of the quarter. At that time, information for the next quarter's data entry will be displayed. You may aggregate your unusual incidents when the incident types are the same.



## PACE MONITORING – PARTICIPANT DEATHS

---

Deaths are defined as the death of participants during the given reporting period.

### *Data Reporting Requirements:*

Total Number of participants.

Cause of the participant's death (Enter diagnosis i.e. congestive heart failure).

Setting of the participant's death (Home, Hospital, NF/SNF, or Other with description).

### *How to use the measure:*

CMS and State users will analyze the data to determine if there is a pattern indicating inappropriate setting for the participant or problems with accessibility to 24-hour care. Because of the link between the number of deaths and enrollment, this information may also indicate if the PACE Organization is maintaining an appropriate census to remain fiscally viable.

### *Data Entry Screens:*

The Participant Deaths screen will display all deaths that have been entered for this quarter. To add one or more Participant Death records, select the "Add" button to advance to the appropriate data entry screen. To delete a Participant Death record, select the checkbox next to each appropriate record and select the "Delete" button. Each Participant Death record will have a

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS logo and "PACE Organization Monitoring" with navigation links for Home, NCO Contacts, and Help. The main content area is titled "PACE Monitoring" and "Add Participant Deaths". It displays the following information:

- H Number: H8801
- Contract Name: Susan B. Anthony Health Care
- PACE Site: Community Life Test Site
- Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)
- Total participants at the End of the Quarter: 50

The data entry form consists of a table with the following structure:

Control #	# of Participant Deaths	Setting
501	<input type="text"/>	<input type="radio"/> Home <input type="radio"/> Hospital <input type="radio"/> NF/SNF <input type="radio"/> Other <input type="text"/>

Below the table is a "Cause of Death" text field with a scrollable area. At the bottom of the form are "Back" and "Submit" buttons. A footer link reads "Go To: PACE Monitoring Start Page | Select a Site".

Control number that is generated by the system to track the record. You will then enter the # of participants deaths, select the setting, and Cause of Death. If you select "Other" as the setting, the associated text field will be enabled, and you can enter a setting other than those listed for selection. The Cause of Death text field allows the user to enter up to 4000 characters. The PACE organization user can continue to enter participant death information until twenty days after the end of the quarter. At that time, information for the next quarter's data entry will be

displayed. You may aggregate your deaths by cause and setting when these have occurred with the same diagnosis and setting.

## PACE MONITORING - NO DATA TO REPORT THIS PERIOD

---

If there is no data to report for a specific quality indicator, select the corresponding checkbox in the "No Data to Report this Period" column and select the "Submit" button.

The screenshot shows a web browser window titled "HPPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page content includes:

- PACE Monitoring**
- Select a PACE Quality Indicator**
- H Number:** H0001
- Contract Name:** Susan B Anthony Health Care
- PACE Site:** Community Life Test Site
- PACE Site Phone #:** 412-311-1111
- Data Collection Period:** 3rd Quarter, 2004 (Jul. - Sep.)
- Total participants at the End of the Quarter:** 50

Instructions: "To enter or edit data for a quality indicator, select the appropriate PACE Quality Indicator link. If you have no data to report for a quality indicator during this quarter, select the 'No Data to Report this Period' checkbox next to the appropriate quality indicator and select the 'Submit' button. It should be noted that once data is entered for a quality indicator the 'No Data to Report this Period' checkbox will be automatically disabled." "You may also select the 'Report' button at the bottom of the page to generate the PACE Site Data Report. The PACE Site Data Report will display the data entered for all PACE quality indicators for the current site and quarter."

PACE Quality Indicator	No Data to Report this Period
<a href="#">Routine Pneumococcal Immunizations</a>	<input type="checkbox"/>
<a href="#">Grievances</a>	<input type="checkbox"/>
<a href="#">Appeals</a>	<input type="checkbox"/>
<a href="#">Enrollments</a>	<input type="checkbox"/>
<a href="#">Disenrollments</a>	<input type="checkbox"/>
<a href="#">Prospective Enrollees</a>	<input type="checkbox"/>
<a href="#">Readmissions</a>	<input type="checkbox"/>
<a href="#">Emergency (Unscheduled) Care</a>	<input type="checkbox"/>
<a href="#">Unusual Incidents</a>	<input type="checkbox"/>
<a href="#">Participant Deaths</a>	<input type="checkbox"/>

Buttons:

# PACE MONITORING - GENERATE SITE SUMMARY REPORT

Once the data for all quality indicators have been entered, you can select the REPORT button at the bottom of the screen to generate a PACE site report.

**HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid**

File Edit View Favorites Tools Help

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**PACE Monitoring**

Select a PACE Quality Indicator

H Number: H8801  
 Contract Name: Susan B Anthony Health Care  
 PACE Site: Community Life Test Site  
 PACE Site Phone #: 412-311-1111

Data Collection Period: 3rd Quarter, 2004 (Jul. - Sep.)  
 Total participants at the End of the Quarter: 50

To enter or edit data for a quality indicator, select the appropriate PACE Quality Indicator link. If you have no data to report for a quality indicator during this quarter, select the "No Data to Report this Period" checkbox next to the appropriate quality indicator and select the "Submit" button. It should be noted that once data is entered for a quality indicator the "No Data to Report this Period" checkbox will be automatically disabled.

You may also select the "Report" button at the bottom of the page to generate the PACE Site Data Report. The PACE Site Data Report will display the data entered for all PACE quality indicators for the current site and quarter.

PACE Quality Indicator	No Data to Report this Period
<a href="#">Routine Pneumococcal Immunizations</a>	<input checked="" type="checkbox"/>
<a href="#">Grievances</a>	<input type="checkbox"/>
<a href="#">Appeals</a>	<input checked="" type="checkbox"/>
<a href="#">Enrollments</a>	<input checked="" type="checkbox"/>
<a href="#">Disenrollments</a>	<input checked="" type="checkbox"/>
<a href="#">Prospective Enrollees</a>	<input type="checkbox"/>
<a href="#">Readmissions</a>	<input checked="" type="checkbox"/>
<a href="#">Emergency (Unscheduled) Care</a>	<input checked="" type="checkbox"/>
<a href="#">Unusual Incidents</a>	<input checked="" type="checkbox"/>
<a href="#">Participant Deaths</a>	<input checked="" type="checkbox"/>

Back Submit Report

**HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid**

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print

**HPMS QA** PACE Organization Monitoring  
 Home | MCO Contacts | Help

**PACE Monitoring Reports**

**PACE Site Data Report**

Report Date: 9/22/2004  
 Report Period: 3rd Quarter, 2004 (Jul. - Sep.)

H Number: H8801  
 Contract Name: Susan B Anthony Health Care  
 PACE Site: Community Life Test Site

Total participants at the End of the Quarter: 50

	Number of Participants Eligible for Vaccine	Number of Participants Given Vaccine	Percentage of Participants Given Vaccine	Number of Participants NOT Given Vaccine (by Reason)		
				Medically Contra-indicated	Received Previous Immunization	Refused
Flu Immunization	No Data to Report	N/A	N/A	N/A	N/A	N/A
Total Flu: 0						
Pneumococcal Immunization	No Data Entered	N/A	N/A	N/A	N/A	N/A

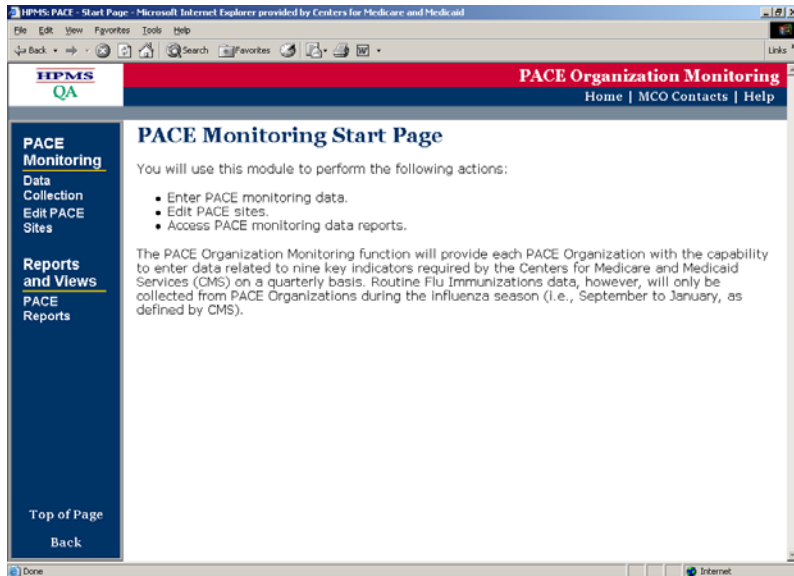
Grievances				
Control #	Tracking ID	Date Initiated	Date Resolved	Source
521	8100	8/8/2004	9/20/2004	Participant

Appeals			
Control	Tracking	Date Initiated	Date Resolved
			Source

## PACE MONITORING - PACE REPORTS LINK

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From the PACE Monitoring Start Page, you can select the PACE Reports link to access various reports.

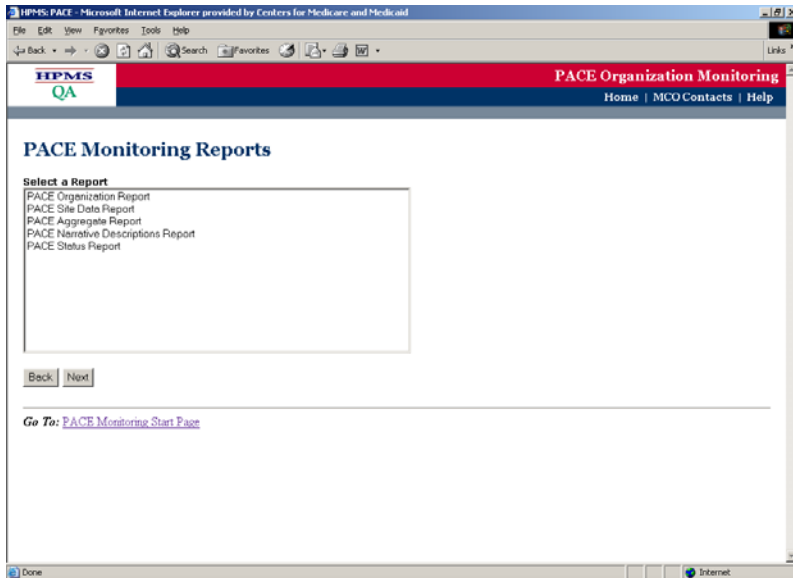


## PACE MONITORING - PACE REPORTS LINK

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The screen below shows a listing of the reports available to PACE organizations. To view a PACE report, select the Report name and then select the "Next" button.

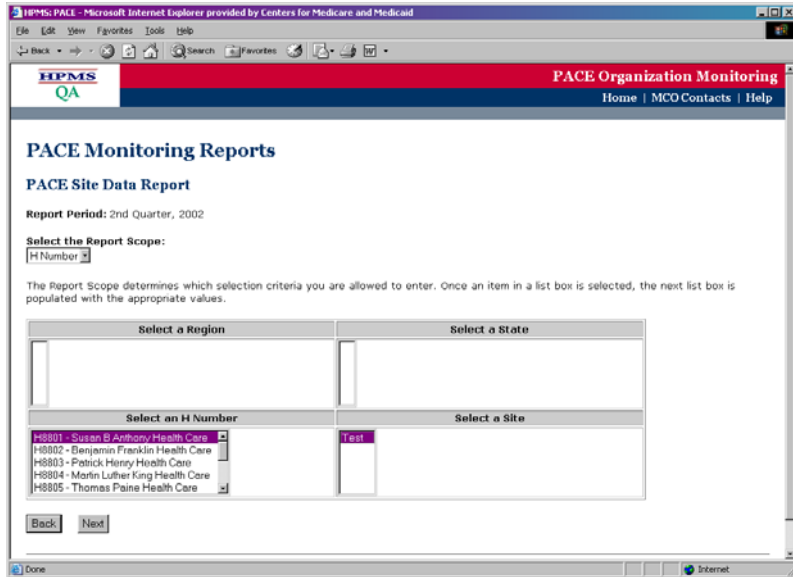
NOTE: The reports only contain those data submitted by your PACE organization. No data, other than contact information, is viewable for other PACE Organizations.



Once you have selected the report, the following screen will appear. Select the quarter containing the data you wish to view, and then select the "Next" button.



Once the report and quarter have been chosen, the following screen will appear.



The user should navigate, where needed, through the Region, State, H Number, and Site screens to select their specific H Number/Site. When complete, select the "Next" button to view that report.

# PACE MONITORING - PACE REPORTS LINK

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## *PACE Organization Report*

The PACE Organization Report displays contact information for all sites within a PACE Organization by Region and State.

The screenshot shows a web browser window titled "HPMS: PACE - Microsoft Internet Explorer provided by Centers for Medicare and Medicaid". The page header includes the HPMS QA logo and "PACE Organization Monitoring" with navigation links for Home, MCO Contacts, and Help. The main content area is titled "PACE Monitoring Reports" and "PACE Organization Report". It displays a "Report Date: 9/22/2004".

Region: 05 - Chicago  
State: CA - California  
H Number: HS815 - Daniel Boone Health Care

PACE Site	Data Entry Contact	Address	E-Mail	Telephone
Tims Test Site	Charlie Brown	111 Test Street Test, MD 21102		(555)555-1212

State: NY - New York  
H Number: HS806 - Eleanor Roosevelt Health Care

PACE Site	Data Entry Contact	Address	E-Mail	Telephone
Theodore Roosevelt	Ted Roosevelt	1234 Washington Blvd Boston, MA 03124		(617)296-5100

Back

Go To: [PACE Monitoring Start Page](#) | [Select a Report](#)



# PACE MONITORING - PACE REPORTS LINK

## *PACE Site Data Report*

The PACE Site Data Report displays the monitoring data for the nine PACE quality indicators by Site.

The screenshot shows a web browser window displaying the HPMS PACE Organization Monitoring interface. The page title is "PACE Organization Monitoring" and it includes navigation links for Home, MCO Contacts, and Help. The main content area is titled "PACE Monitoring Reports" and "PACE Site Data Report".

Report Date: 9/22/2004  
 Report Period: 3rd Quarter, 2004  
 H Number: H8804  
 Contract Name: Martin Luther King Health Care  
 PACE Site: 460 - state of michigan

Total participants at the End of the Quarter: 0

	Number of Participants Eligible for Vaccine	Number of Participants Given Vaccine	Percentage of Participants Given Vaccine	Number of Participants NOT Given Vaccine (by Reason)		
				Medically Contra-indicated	Received Previous Immunization	Refused
Flu Immunization	No Data to Report	N/A	N/A	N/A	N/A	N/A
Total Flu: 0						
Pneumoceccal Immunization	No Data Entered	N/A	N/A	N/A	N/A	N/A

**Grievances**

Control #	Tracking ID	Date Initiated	Date Resolved	Source
No Grievances Found				

**Appeals**

# PACE MONITORING - PACE REPORTS LINK

## *PACE Aggregate Report*

The PACE Aggregate Report displays an aggregate level summary for each of the nine PACE quality indicators by Region, State, or Site. These data are collected/entered by PACE Organization by numerator and denominator and are reported by percentages.

**PACE Monitoring Reports**  
**PACE Aggregate Report - Regional**  
**Report Date:** 9/22/2004  
**Report Period:** 3rd Quarter, 2004  
**Region(s):** Chicago  
**Total Number of Sites Included:** 2  
**Total Participants at the End of the Quarter:** 0

	Number of Participants Eligible for Vaccine	Number of Participants Given Vaccine	Percentage of Participants Given Vaccine	Number of Participants NOT Given Vaccine (by Reason)		
				Medically Contra-indicated	Received Previous Immunization	Refused
Flu Immunization Total Flu: 0	No Data to Report	N/A	N/A	N/A	N/A	N/A
Pneumococcal Immunization	No Data to Report in 0 site(s)	N/A	N/A	N/A	N/A	N/A

	Frequency	Percent
Grievances:	0 in 0 site(s)	N/A
Appeals:	0 in 0 site(s)	N/A

Enrollments from 0 site(s)			
	July, 2004	August, 2004	September, 2004
Total Enrollments	0	0	0

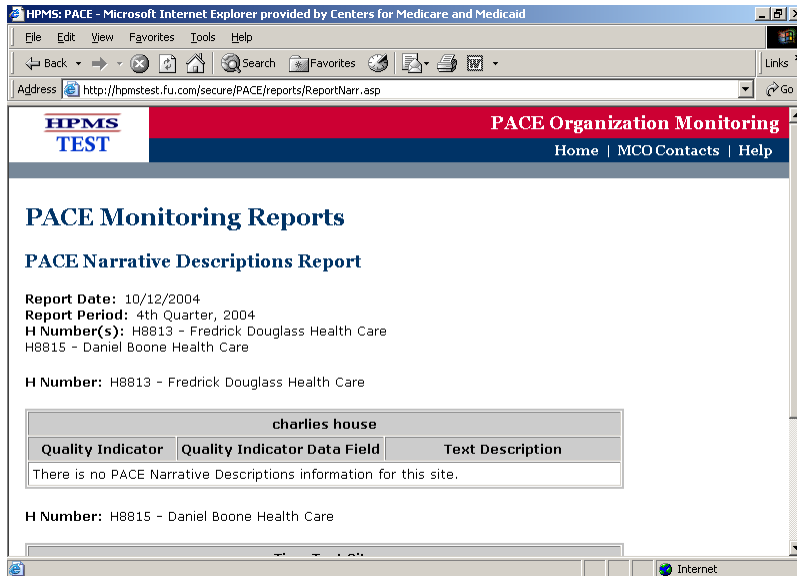
	Frequency	Percent
Disenrollments		
Involuntary:	0 in 0 site(s)	N/A
Voluntary:	0 in 0 site(s)	N/A
Prospective Enrollees	0 in 0 site(s)	N/A
Readmissions	0 in 0 site(s)	N/A

# PACE MONITORING - PACE REPORTS LINK

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## *PACE Narrative Descriptions Report*

The PACE Narrative Descriptions report displays the text entered in the narrative data fields for the nine PACE quality indicators by H Number, Site, and quarter.

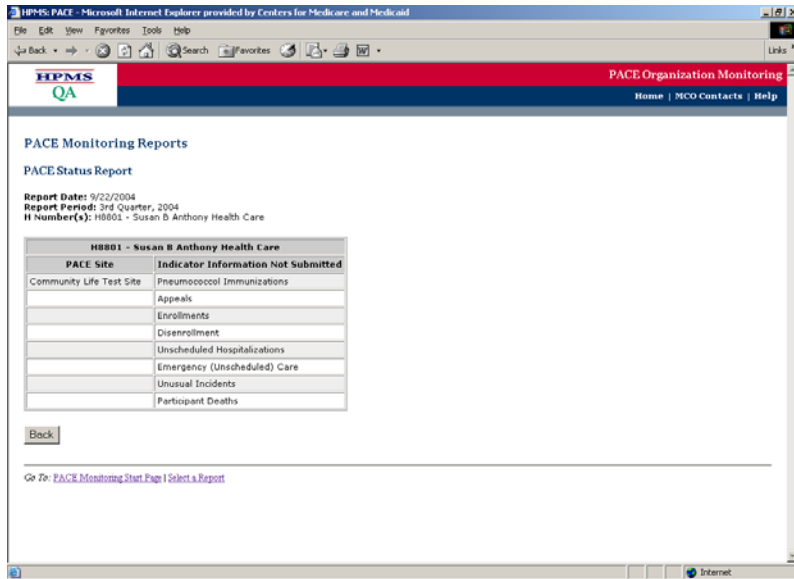


# PACE MONITORING - PACE REPORTS LINK

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## *PACE Status Report*

The PACE Status Report identifies which PACE site data has not been submitted, or on the other hand, indicates that all data have been successfully entered.



## **HPMS CONTACT INFORMATION**

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Please contact the HPMS Help Desk at 1-800-220-2028 for technical assistance on the use of the HPMS for the reporting of PACE data elements.

If you have any questions regarding PACE regulations pertaining to the reporting requirements, please do not hesitate to call Sandra Bastinelli at 410-786-3630.