

Utilization Management Committee Matrix

Report Name		Description of Report	Frequency	Method of collection	Responsibility	Reason for Monitoring	Follow Up Expectations
1.	CC360 High Utilizers	MDHHS reports available via CC360. Identifies high inpatient utilizers that are open CMH clients.	Monthly	Report: High Utilizers (CC360), High Utilizers (PBI)	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS	UM Mission	To follow up with open clients on the list; reduce future ER visits if applicable
	CC360 Trending High Utilizers	MDHHS reports available via CC360. Identifies trending high inpatient utilizers that are open CMH clients.	Monthly	Report: Trending High Utilizers (CC360), Trending High Utilizers (PBI)	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS	UM Mission	To follow up with open clients on the list; reduce future ER visits if applicable
2.	BH-TEDs Data Completeness	The report monitors data completeness in non-crisis MH BH-TEDs records.	Monthly	Report: Missing BH TEDS (CR)	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS	Contract Requirement	Program supervisors review non-compliant cases and follow up with staff to correct
	BH TEDS - LOCUS	The report monitors LOCUS completeness for MI Adults in BH-TEDS records.	Monthly	Report: LOCUS BHTEDS Completeness (CR)	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS, QI Data Technician (Jeevan)	Contract Requirement	Program supervisors review cases on the list and follow up with staff to correct; QI Data Technician (Jeevan) updates BH TEDS where newer LOCUS exists
	BH TEDS - Veteran	The report monitors completeness of Veterans and Military fields in BH TEDS.	Quarterly: March, June, September, December	Report: Veteran BHTEDS Completeness (PBI)	Report: UM/EDI Data Technician (Tiffany)	Contract Requirement	Ongoing monitoring
	BH TEDS Data Completeness - SUD	The report monitors data completeness in SUD BH-TEDs records.	Monthly	Report: Missing SUD BH TEDS (CR)	Report: UM/EDI Data Technician (Tiffany) Follow Up: SUD PS	Contract Requirement	SUD program supervisor reviews non-compliant cases and follows up with SUD providers to correct
3.	Primary Care Physician Report	The report determines the number & percent of consumers who do not have a primary care physician. The benchmark for this report is 95% completeness. Also identifies % of consumers who report seeing their PCP in last year (PSA).	Monthly	Report: Missing PCP (PBI), export list to Excel	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS	Contract Requirement	Program supervisors review consumers on missing list to assist in obtaining a PCP for those that do not have one.

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4.	ANSA Outcomes	This report compares two assessments per consumer over a year to identify number of consumers with changes. Emphasis on key measures: suicide risk, self mutilation, depression, anxiety, psychosis.	Biannually: April, October	Report: ANSA (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF	Ongoing monitoring of outcomes
	DD ANSA	This report compares two assessments per consumer over 2 years to identify number of consumers with changes for key measures: relationship permanence, well being, inclusion, natural supports, talents/interests.	Biannually: April, October	Report: DD ANSA (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF	Ongoing monitoring of outcomes
	Family Services Outcomes	PECFAS/CAFAS/MichiCANS	TBD			CARF	
5.	Number and percent of Spenddown cases	Monthly, this report includes all consumers funded by Medicaid Spenddown. Quarterly, this report includes the # of consumers falling into each level of care by population and the % of money spent for that level within the population are obtained for the reporting period. The # of Spenddown consumers are charted over time. The report also includes a breakdown of cost for Spenddown consumers.	Quarterly: February, May, August, November Monthly (follow up list)	Report: Monthly Spenddown (PBI) and Quarterly Spenddown Number & Percent (CR)	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS, CMH Finance	Contract Requirement	Program supervisors follow up on cases over deductible; CMH Finance verify eligibility and update CEFE/ supplemental client data accordingly.
6.	Current State Psychiatric Inpatient	This report shows those with a current State Psychiatric Inpatient authorization, as well as those will an open State Psychiatric Inpatient episode.	Quarterly: January, April, July, October	Report: State Psychiatric Inpatient (PBI)	Report: UM/EDI Data Technician (Tiffany)	UM Mission	Ongoing monitoring and discussion around ability to move to a lower level of care
7.	Average cost per case	Estimates the average cost per consumer each quarter by population and level of care.	Annual: January	Reports: Services report & Population list (CR)	Report: UM/EDI Data Technician (Tiffany)	CARF UM Mission	Ongoing monitoring
8.	Local Psychiatric Inpatient Utilization (CMH responsibility)	The report tracks the quarterly # of local hospital admissions, discharges, inpatient days, & the ALOS for cases which are the responsibility of CMH (consumers funded by Medicaid, Spenddown, & General Fund). A statistical control chart is used to monitor these factors over time. Consumers with an ALOS 9 days or greater are identified.	Quarterly: January, April, July, October	Report: Local Psychiatric Inpatient (PBI), export list to Excel	Report: UM/EDI Data Technician (Tiffany) Follow Up: PS	UM Mission	Program supervisors review the list and update with rationale.
9.	CMH Team Productivity	This report reviews billable hours by staff and position type for previous three months. The denominator is adjusted to account for total available time (excluding vacation and holidays).	Quarterly: March, June,	Reports: Productivity - New, Executime (CR), Payroll data (CMHOC Finance)	Data: CMH Finance (Nick Sall)	CARF UM Mission	Program supervisors review their staff's productivity and address as needed.

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			September, December Monthly: By request		Report: UM/EDI Data Technician (Tiffany) Follow up: PS		
10.	Access screens and percent referred out	This report displays the number of Access Screens and the percent referred to other agencies.	Annual: October	Report: ACCESS screens and referred out (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF	Ongoing monitoring
11.	Inpatient requests and percent denied	This report displays the number of inpatient requests and the number and percent of those requests that were denied.	Annual: November	Report: Inpatient Denied (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF	Ongoing monitoring
12.	Units of Service - ACT	This report displays hours of ACT service (all face- to-face contacts), cases not meeting the 6 hour standard are highlighted in red. A graph shows the percent of ACT consumers meeting this standard over time.	Quarterly: February, May, August, November	Reports: ACT units of service (CR)	Reports: UM/EDI Data Technician (Tiffany) Follow Up: MI Adult supervisor	CARF UM Mission Contract Requirement	MI Adult supervisor reviews cases not meeting standard and follows up as appropriate
	Units of Service - HB	This report displays the Home Based standard of 4 hours of face-to-face (billable) services per month as defined by MDHHS. The highlighted areas are the months in which this standard was not met.	Quarterly: February, May, August, November	Report: Home Based units of service (CR)	Reports: UM/EDI Data Technician (Tiffany) Follow Up: Family Services supervisor	CARF UM Mission Contract Requirement	Family Services supervisor reviews cases not meeting standard and follows up as appropriate
	Units of Service - HSW	This report displays active HSW consumers with units of service by month. HSW consumers must receive at least 1 HSW service per month. Those without a monthly HSW service are highlighted	Quarterly: February, May, August, November	Report: HSW units of service (CR)	Reports: UM/EDI Data Technician (Tiffany) Follow Up: DD Adult supervisor	CARF UM Mission Contract Requirement	DD Adult supervisor reviews cases not meeting standard and documents reason.
13.	MMBPIS Indicator	This is a quarterly review of Ottawa's Performance indicators.	Quarterly: April, July, October, January	Reports: Individual Indicator dashboards (PBI)	Report: UM/EDI Data Technician (Tiffany), QI Data Technician (Anna)	Contract Requirement	Ongoing monitoring
14.	Crisis Residential Utilization	Statistical Control charts are used to monitor monthly # of days, # of admissions, and the average length of stay in Crisis Residential.	Annual: February	Report: Crisis Residential (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF UM Mission	Ongoing monitoring
15.	Medicaid Penetration Rate/DEG Enrollment	The report shows the rate at which we are serving those eligible in Ottawa County. Statistical Control charts are used to monitor monthly # of DAB, TANF, HMP enrollees.	Annual: December	Data: Medicaid Numbers (Excel) Report: Medicaid Penetration (PBI)	Data: CMH Finance (Amy Bodbyl-Mast) Report: UM/EDI Data Technician (Tiffany)	UM Plan	Ongoing monitoring

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16.	Number Served	Charts are used to track the monthly number of consumers served by population.	Annual: December	Report: Numbers Served (PBI)	Report: UM/EDI Data Technician (Tiffany)	UM Plan	Ongoing monitoring
17.	Bi-Annual Report to Board, Consumer Advisory Committee, and Stakeholders	A bi-annual report will be created and shared with the Board, CAC, and Stakeholders (CMHOC website).	Biannual Review in UM: April, October Publish: May, November	May: MMBPIS, Number Served by Population, Hospital Length of Stay, Crisis Residential Length of Stay, PECFAS/CAFAS outcomes November: Consumers Served, Recidivism (30,60,90 days), Outcomes (ANSA & DD ANSA), Monthly Number of High Utilizers	Report: UM/EDI Data Technician (Tiffany)	CARF UM Plan	UM committee reviews and approves report prior to presenting to the board.
18.	Percent discharged with goals achieved	Displays the number and percent of agency discharges by population.	Annual: April	Report: Discharge Summary (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF - Outcomes	Ongoing monitoring
19.	Caseload Size	Displays the caseload size by admitting and attending practitioner.	Quarterly: March, June, September, December	Report: Caseload Size (PBI)	Report: UM/EDI Data Technician (Tiffany)	CARF - Outcomes	Ongoing monitoring
20.	Regional UM Reports	Performance Summary by CMHSP and CMHSP graphs of measures not met.	Quarterly: February, May, August, November	Report: HEDIS KPI Dashboard (PP)	Report: UM ROAT, CMH IT PS (Kristi)	UM Mission	Ongoing monitoring