



*The First Three
Reports*

Aliados Health

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PHP Report Set Implementation Guide

Data Workgroup, May 12, 2026

By Benjamin Fouts, Data Analyst

Agenda

- General Overview of the New PHP Report Set
- Report 1: Master PHP Monthly Enrollment List
- Report 2: PHP Enrollment Over Time
- Report 3: QIP Denominator List Management
- Next Steps



General Overview of the New PHP Report Set



New PHP Report Set

- “PHP Reports” refer to a set of four reports that can help you to analyze data provided by the Partnership HealthPlan of California (PHP)
- The data covers monthly membership lists (i.e., people enrolled in Partnership HealthPlan/Medi-Cal and assigned to the health center), quality measure outcomes (i.e., the QIP measure outcomes of assigned members), and claims data (i.e., the claims generated by assigned members)
- Assigned members may or may not be in your EHR, and may or may not have ever been seen at your health center



This Month's Presentation

- This is not a general overview of the wider context of increasing access to care and preventive services, the structure of Partnership data, the data flow through Relevant, etc., which was given during the Analytics Academy in April
- The Academy presentation will be added to the Aliados Health website, along with today's slides
- Due to the length of today's presentation, three reports covering the membership lists and QIP measures will be discussed. *The claims report will be covered next month*
- Since claims data "lags" by 3 to 6 months, it is not as timely as the membership or QIP data, which you can start working with right away



Design Notes that Apply to All Reports

- Since these reports are not used for standard reporting, the health center can make changes to them, add/delete columns, etc.
- The SQL code contains text notations so you know what each temporary table is doing
- Similar columns are named the same in all reports (examples: php_last_name, count_uds_vsts_1y)
- Columns with similar themes group together in each report, and are displayed the same way among the reports (examples: PHP and EHR demographics, visit count columns)



Column Prefix Terminology

- Data from the Partnership membership or QIP files: php_
- Data from the Partnership claims file: claim_
- Data from the EHR: ehr_
- Data from a calculation: calc_

If you customize the report for your own use, you do not necessarily need to follow this convention



Member EHR Status

Members on the reports fall within three categories depending on their EHR status:

1. Patients with an EHR record and a history of visits (by far, the most common)
2. Patients with an EHR record but no visits (they have a medical record number but have never actually been seen... or perhaps not seen yet)
3. Members with no EHR record (could be new members or members you have not been able to contact)



Member EHR Status Calculated Column

- Column named calc_ehr_status on all reports
- Text present in this column:
 - Established EHR patient with visits
 - EHR patient with no visits
 - No match to EHR patients



Version 1 with Expectation of Improvements

- Let's validate the data together over the next month
- Please let Ben Fouts know if you see anything unexpected or unusual in the data
- The reports were designed based on my best knowledge of how this data might be useful to health centers. However, it is expected that different health centers may have varying approaches, philosophies, and perform different actions with the data. Therefore, feel free to modify the reports accordingly
- All health centers might benefit from your feedback and report modifications



Feedback Encouraged

- If you have an approach to managing the Partnership lists that you think may benefit other health centers in general, please let Ben Fouts or an Aliados Health Analytics Team Member know
- This could be things like:
 - ✓ Additional columns on the report you added yourself or think would be useful to others in general
 - ✓ Ideas for new reports
 - ✓ Workflow improvements to make using the data more thorough or efficient
- Basically, ANY feedback, suggestion or idea is useful!



Report 1: Master PHP Monthly Enrollment List

Universe: Members assigned to the health center in a month specified by the user



Master PHP Monthly Enrollment List Report

- **Name: Master PHP Monthly Enrollment List**
- **Purpose:** This is the main report that displays members from the uploaded monthly membership list and associated data from linked records in Relevant. Normally, health centers would run the report for the most recent month that data is available
- **Parameter:** Identifies a single month of enrolled members (can be any month, as long as there was a membership upload)
- **Structure of output rows:** Each row is one unique member from the membership list of the month identified in the parameter



Display Columns (Basic Member Data)

All members on the list

- PHP basic demographics

Members who match to EHR patients

- EHR basic demographics
- EHR primary care provider and location
- EHR status (see slide from previous section)
- EHR record origin (derived from the PHP-EHR matching algorithm)



Display Columns (Relevant Visits)

- The last patient visit dates, by major department (using standard Data Elements). In other words, the last medical visit, dental visit and behavioral health visit (mental health or substance abuse visit) before the end of the measurement period month is displayed. These must be part of the UDS universe.
- The count of visits in the past year (by major department) using the same definitions above



Calculated Columns

- New member (definition: if the member did not appear on any previous monthly membership list in Relevant)
- Note that this is different than the column for the new member flag (php_new_member_flag). This can mean a member with completely new insurance, a member newly assigned to the health center, or a member re-assigned to a new facility at the same health center
- TRUE/FALSE for different PHP and EHR patient name
- TRUE/FALSE for different PHP and EHR patient date of birth
- TRUE/FALSE for different PHP and EHR patient sex



Outputs (Slide 1)

New Members

calc_new_member	Totals
true	
false	
Totals	

Has Redetermination Date

calc_redeterm_date_3m	Totals
true	
false	
Totals	

Had Med Visit Last Year

calc_had_med_vsts_1y	Totals
true	
false	
Totals	

Had Non-Med UDS Visit Last Year

calc_had_other_vsts_1y	Totals
true	
false	
Totals	

Member EHR Status

calc_ehr_status	Totals
EHR patient with no visits	
Established EHR patient with visits	
No match to EHR patients	
Totals	

Count UDS Visits

count_uds_vsts_1y	Totals
0	
1	
2	Etc.

Location PHP EHR

	calc_location_name	Location #1	Location #2	Totals
ehr_primary_location				
Location #1				
Location #2				Etc.



Outputs (Slide 2)

Tip: it is easy to add new output tabs in Relevant, so create new summaries that are helpful to your work

PCP EHR	
ehr_primary_prov	Totals
<no name appears>	
Name list	Etc.

Member Age	
calc_age_group	Totals
1. Under 18 years	
2. 18 to 40 years	
3. 41 to 64 years	
4. 65 years and older	
Totals	

Member Sex	
php_sex	Totals
F	
M	
Totals	

Average Med Visits				
calc_age_group	php_sex	F	M	Totals
1. Under 18 years		1.63	1.60	1.61
2. 18 to 40 years		2.67	0.90	1.88
3. 41 to 64 years		3.36	2.05	2.74
4. 65 years and older		3.47	2.79	3.19
Totals		2.53	1.53	2.05

You can modify these age categories

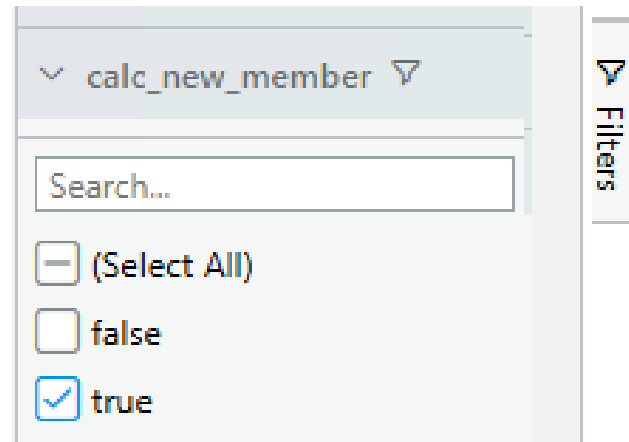
Average medical visits in past year

Different Data PHP Versus EHR			
calc_diff_name	calc_diff_dob	calc_diff_sex	Totals
false	false	false	
		true	Check
	true	false	Check
true	false	true	Check
		false	Check
	true	true	Check
Totals			



Examples of Tasks

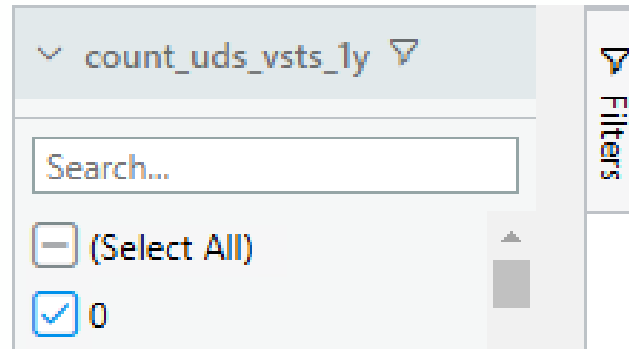
- Contact new members



A screenshot of a filter panel titled "calc_new_member". It features a search bar with the text "Search...". Below the search bar are three filter options: "(Select All)" with an unchecked checkbox, "false" with an unchecked checkbox, and "true" with a checked checkbox. A vertical "Filters" label is on the right side of the panel.

You can also add filters for visits ($\text{count_uds_vsts_1y} = 0$) or use the `calc_ehr_status` column to see if the patient is in the EHR already (and with or without visits)

- Contact members who have not been seen for a UDS visit in one year



A screenshot of a filter panel titled "count_uds_vsts_1y". It features a search bar with the text "Search...". Below the search bar are two filter options: "(Select All)" with an unchecked checkbox and "0" with a checked checkbox. A vertical "Filters" label is on the right side of the panel.

Alternately, contact patients without a medical visit (column `calc_had_med_vsts_1y = false`)

Option: modify SQL to look-back a different period (more about this later)



Examples of Tasks

- Records with different name, date of birth, or sex in the EHR compared to Partnership

▼ calc_diff_name ▼

(Select All)

false

true

▼ calc_diff_dob ▼

(Select All)

false

true

▼ calc_diff_sex

(Select All)

false

true

Recommendation: develop a workflow or policy around how to verify which information is correct and how it can be corrected



Customization Opportunities

- Change the count of visits in past year to another time-period
- Modify the TEMPORARY TABLE pt_visit_counts_1y
- You can change the data span from 'past 1 year' to 'past 18 months' or 'past 2 years' depending on the perspective/policy you normally take with these patients
- Add the date/provider/location of the next future visit (if your health center has a standard way this is displayed)



Report 2: PHP Enrollment Over Time

Universe: Members assigned to the health center in the entire year prior to the month-end specified by the user



PHP Enrollment Over Time Report

- **Name:** PHP Enrollment Over Time
- **Purpose:** This report displays all members on membership lists over the past year and their continuity over the twelve individual months
- **Parameter:** Identifies the last month of enrolled members in the desired series of months (can be any year-long period, as long as there were 12 months of membership list uploads)
- **Structure of output rows:** Each row is one unique member from at least one membership list in the twelve months ending in the parameter month



Note on Continuous Data

- This report contains calculations for continuous enrollment and number of months enrolled
- Therefore, the membership data must have 12-months of continuous uploads for this report to work
- If you are missing any months of enrollment data in the period, no member will appear to have continuous enrollment and the number of months of enrollment will be misleading
- The output tab “Must be 12 Uploads” (based on the column report_uploads) displays the number of monthly uploads over the past year. It must display the number 12 for the report to be valid



Display Columns (Basic Patient Data)

- PHP basic demographics
- EHR basic demographics
- EHR primary care provider and location
- EHR status

Same as Report #1



Calculated Columns (Visits)

- Number of UDS visits in the past year
- Number of UDS medical visits in the past year
- Number of UDS visits during months enrolled in the past year
- Number of UDS medical visits during months enrolled in the past year

Similar to Report #1 but without the department detail



Calculated Columns (Year-Long Enrollment)

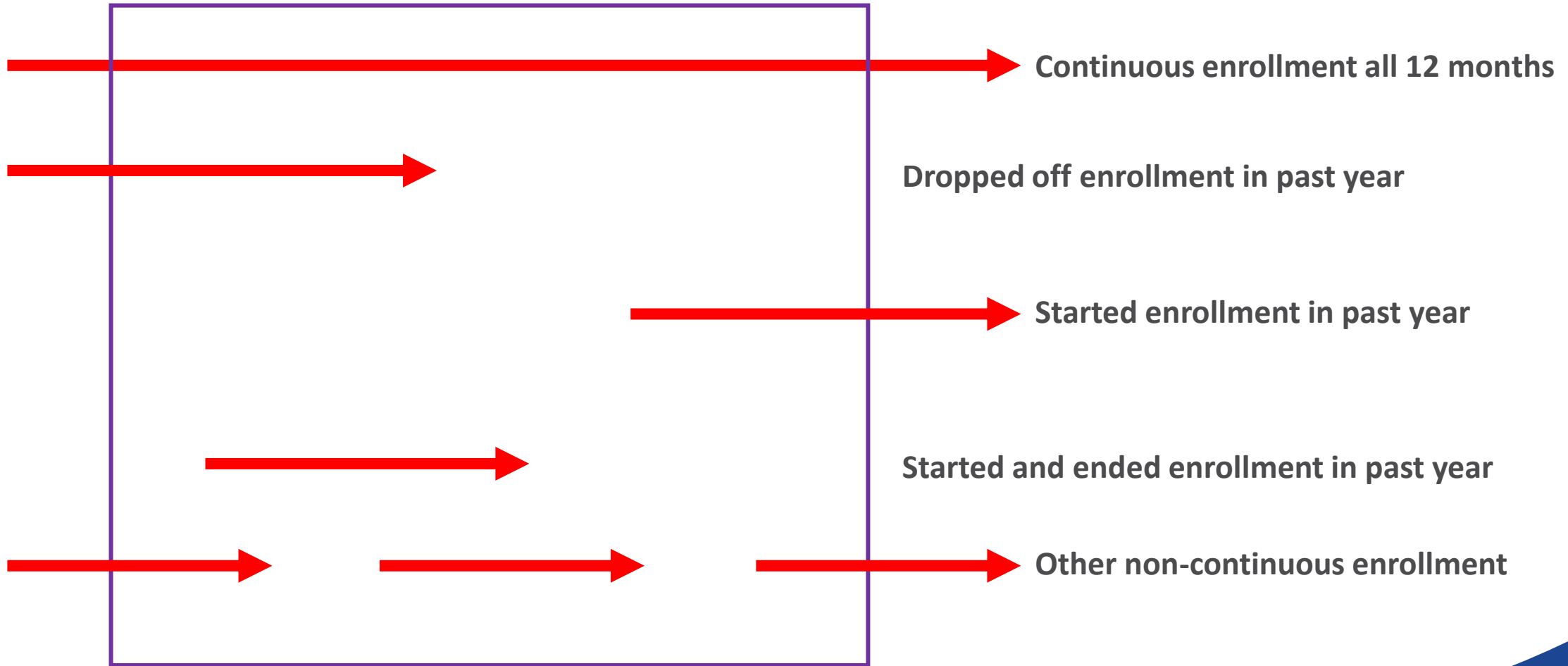
- Number of months enrolled over past year (out of 12 months)
- Abbreviated names of months (in order) that the patient was enrolled

calc_enrolled_months	calc_month_string
12	Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar
5	Nov, Dec, Jan, Feb, Mar
2	Apr, Oct



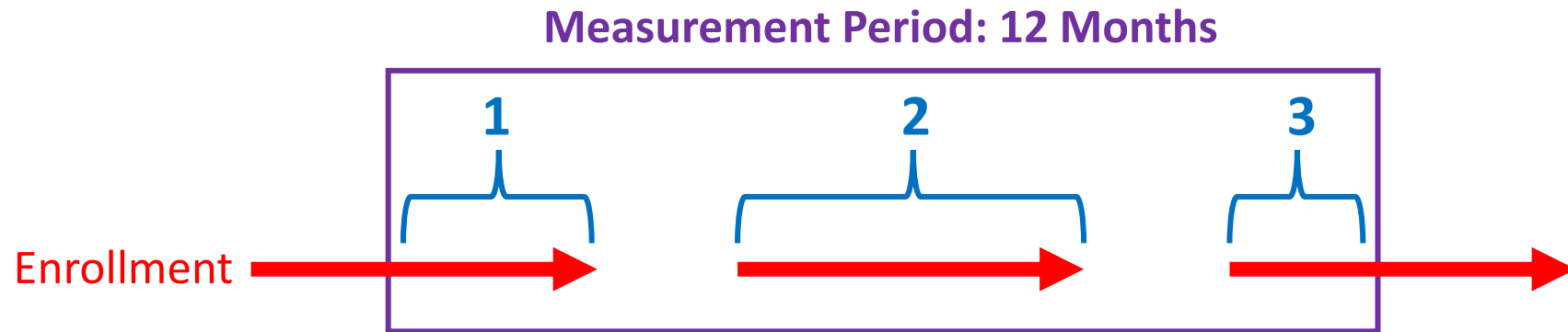
Calculated Membership History Explanation

Measurement Period: 12 Months



Calculated Columns (Membership History)

- Categories for Calculated Membership History (same as text on last slide)
- Number of membership blocks. For example, if the patient has to renew twice in a year, it is possible that there could be two “gaps” resulting in three blocks



Calculated Columns (New Members)

- TRUE/FALSE if the member was a new member in the past year (definition: if the member did not appear on any previous monthly membership list in Relevant)
- The date of new membership
- Access calculation for the number of days between the new membership date and the first medical visit. Note that if the patient was a new member and did NOT have a medical visit (yet), the number 9999 will appear in the days calculation column (needed in order to count these patients in a summary tab)



Outputs (Check First)

- The column report_uploads displays the number of monthly uploads (max one per month counted) in the past year
- For the report to be valid, this must equal 12
- Check the tab “Must be 12 Uploads” to see that only the number “12” appears

Must be 12 Uploads

report_uploads	Totals
12	
Totals	



Outputs (Slide 1)

Months Enrolled (# Pts)

calc_enrolled_months	Totals
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
Totals	

Also a tab for % pts

Membership History (# Pts)

calc_membership_history	Totals
Continuous enrollment all 12 months	
Dropped off enrollment in past year	
Other non-continuous enrollment	
Started and ended enrollment in past year	
Started enrollment in past year	
Totals	

Also a tab for % pts

Had Med Visit While Enrolled

calc_had_med_vsts_enrolled	Totals
true	
false	
Totals	

Had Non-Med UDS Visit While Enrolled

calc_had_other_vsts_enrolled	Totals
true	
false	
Totals	

Count UDS Visits While Enrolled

count_uds_vsts_1y	Totals
1	
2	Etc.



Outputs (Slide 2)

Member EHR Status

calc_ehr_status	Totals
EHR patient with no visits	
Established EHR patient with visits	
No match to EHR patients	
Totals	

Member Age

calc_age_group	Totals
1. Under 18 years	
2. 18 to 40 years	
3. 41 to 64 years	
4. 65 years and older	
Totals	

New Members

calc_new_member_1y	Totals
true	
false	
Totals	

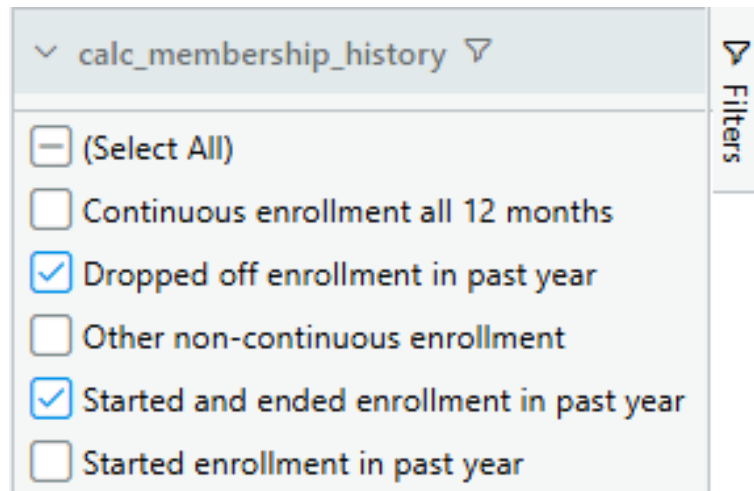
New Member Days to First Med Visit

calc_new_member_days_to_med_visit	Totals
0	
1	
2	Etc.



Example of a Task Using the Data

- Contact patients who dropped Partnership insurance



A screenshot of a filter menu for the table 'calc_membership_history'. The menu is titled 'calc_membership_history' with a dropdown arrow on the left and a 'Filters' label on the right. It contains a list of filter options, each with a checkbox:

- (Select All)
- Continuous enrollment all 12 months
- Dropped off enrollment in past year
- Other non-continuous enrollment
- Started and ended enrollment in past year
- Started enrollment in past year

*Option to add a filter for patients in the EHR who have been seen previously
(`calc_ehr_status = "Established EHR patient with visits ever"`)*



Customization Opportunities

- Some columns display counts of visits, which may appear as a long list in the summary
- A calculated column can group the counts in a way that makes sense to you. For example, under 5 visits, 5 to 9 visits, 10 to 19 visits, 20+ visits. It depends on how you want to see the groups
- Columns examples that can be grouped:
 - ✓ Count of medical visits
 - ✓ Count of non-med UDS visits
 - ✓ New Member Days to First Med Visit



Report 3: QIP Denominator List Management

Universe: Members assigned to the health center who are in the QIP quality measure denominators of the month specified by the user



QIP Denominator List Management Report

- **Name:** QIP Denominator List Management
- **Purpose:** This report joins the uploaded QIP denominator lists (15 measures) to EHR patients in order to see additional patient information. Normally, health centers would run the report for the most recent month that data is available.
- **Parameter:** Identifies the month of the denominator list (can be any month, as long as there was a QIP upload)
- **Structure of output rows:** Each row is one unique member from one or more of the measure denominators in the month identified in the parameter



Display Columns (Basic Patient Data)

- PHP basic demographics
- EHR basic demographics
- EHR primary care provider and location
- EHR status

Same as Report #1



Calculated Columns (Visits/Enrollment)

Same as report #1

- Last visit date (by department)
- Number of UDS visits (by department) in past year

Unique to this report

- Number of preventive visits in the past year
- Number of medical visits year-to-date
- Number of months enrolled year-to-date (at end of year, should be at least 9 of 12 to get into the “final” denominator)



Calculated Columns (QIP Data)

- Number of measures the patient belongs to
- Number of numerators the patient belongs to
- List of all measures (in separate columns) with numerator status
 - “Numerator” = patient in numerator
 - “Denominator” = patient in denominator but not numerator
- TRUE/FALSE column showing if the patient is currently in the numerator of all qualifying measures



Outputs (Slide 1)

- The column `php_total_measures` displays the number of measures the patient belongs to
- In the summary table, the Totals column displays the number of patients who have the indicated number of measures

Measures per Patient

php_total_measures	Totals
1	
2	
3	
4	
5	
6	
7	
Totals	

Measures per New Patient

	calc_new_member	false	true	Totals
php_total_measures				
1				
2				
3				
4				
5				
6				
7				
Totals				

New patients can be prioritized for outreach by the number of measures they belong to (beyond standard outreach practice)



Outputs (Slide 2)

Denominator - Numerator Crosstab (% Pts)

	php_total_numerators	0	1	2	3	4	5	6	Totals
php_total_measures									
1		73.6%	26.4%	1					100.0%
2		54.8%	30.4%	14.8%					100.0%
3		26.8%	28.0%	28.2%	17.0%				100.0%
4		19.7%	30.0%	29.5%	16.9%	3.9%	2		100.0%
5		14.1%	33.4%	29.4%	21.8%	1.2%			100.0%
6		8.7%	15.7%	30.0%	28.9%	15.9%	0.9%		100.0%
7	3	3.3%	12.4%	17.2%	27.8%	21.1%	16.7%	1.4%	100.0%
	Totals	60.6%	27.3%	7.9%	3.4%	0.6%	0.1%	0.0%	100.0%

The column `php_total_numerators` displays the number of numerators the patient belongs to

This Row Data Definition: Percentage of patients with one measure who are in the numerator of one measure

Example 1: "26.4% of patients with one measure are in the numerator of one measure"

Example 2: "3.9% of patients with four measures are in the numerator for all four measures"

Example 3: "3.3% of patients with seven measures are not in any numerator of any measure"



Outputs (Slide 3)

Denominator - Numerator Crosstab (# Pts)

		php_total_numerators								
php_total_measures		0	1	2	3	4	5	6	7	Totals
1				Grey	Grey	Grey	Grey	Grey	Grey	
2		Yellow			Grey	Grey	Grey	Grey	Grey	
3		Yellow	Yellow			Grey	Grey	Grey	Grey	
4		Yellow	Yellow	Yellow			Grey	Grey	Grey	
5		Yellow	Yellow	Yellow	Yellow			Grey	Grey	
6		Yellow	Yellow	Yellow	Yellow	Yellow		Grey	Grey	
7		Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	
	Totals									

Grey = no patients in these cells
Yellow = prioritize patients in these cells depending on resources

This area gives the most return on improving measures relative to your effort



Outputs (Slide 4)

Patients in All Numerators

calc_in_all_numerators	Totals
true	21.2%
false	78.8%
Totals	100.0%

Not Numerator per Patient

calc_total_not_numerator	Totals
0	
1	
2	
3	
4	
5	
6	
7	
Totals	

“True” is equal to the sum of all the green cells (where number of measures = number of numerators)

Denominator - Numerator Crosstab (% Pts)

	php_total_numerators	0	1	2	3	4	5	6	7	Totals
php_total_measures										
1										
2										
3										
4										
5										
6										
7										
	Totals									

Alternative Perspective

Column **calc_total_not_numerator** displays the number of numerators the patient does not belong to. Members with more than one are your target patients for outreach. Members with a higher number should have a higher priority



Outputs (Slide 5)

Not Numerator by Patients With Med Visit YTD

	calc_had_med_vsts_ytd	false	true	Totals
calc_total_not_numerator				
0				
1				
2				
3				
4				
5				
6				
7				
	Totals			



Patients in all numerators (ignore)



Patients who had visits this year but are not (yet) numerator compliant



Patients missing numerators and no visit yet this year

Med visit YTD = had a medical visit in the year-to-date

Option: replace no visit year-to-date with no visit in past year



Outputs (Slide 6)

Not Numerator by EHR Status

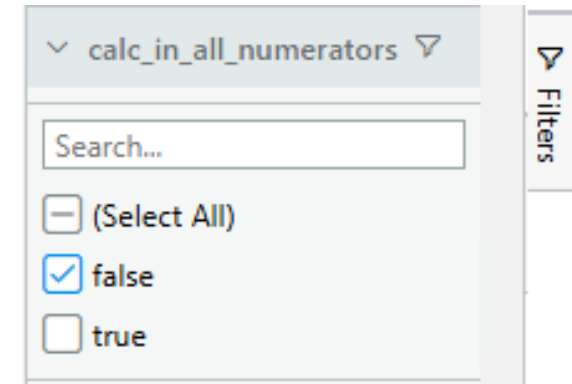
	calc_ehr_status	EHR patient with no visits	Established EHR patient with visits	No match to EHR patients	Totals
calc_total_not_numerator					
0					
1					
2					
3					
4					
5					
6					
7					
	Totals				

These patients will likely remain numerator non-compliant unless they are recalled for a preventive visit

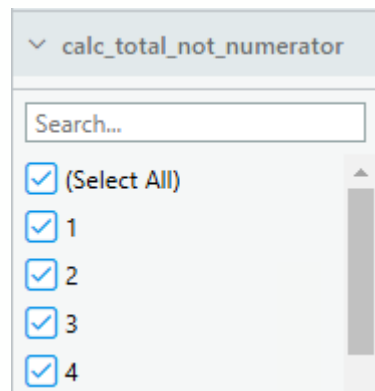


Examples of Tasks

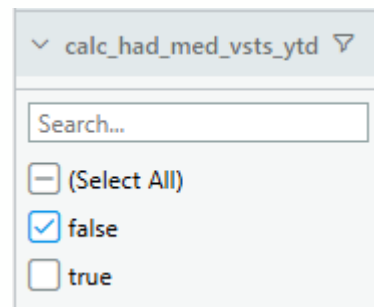
- Define all patients with at least one non-compliant numerator



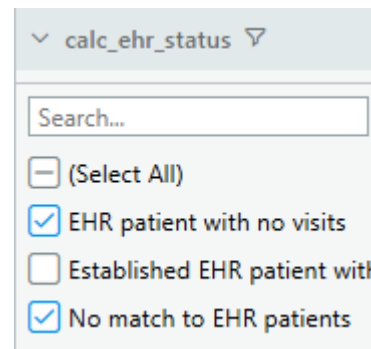
- Then add other filters to refine or order the list



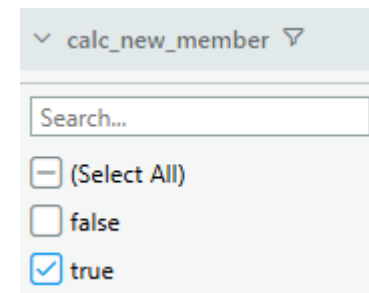
Choose higher numbers or order descending



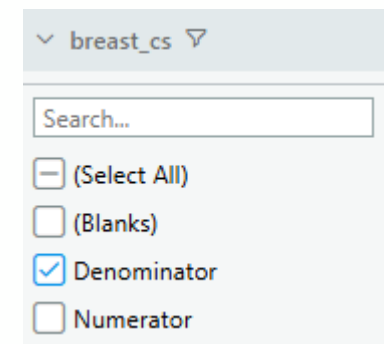
No medical visit year-to-date (above) or within the past year (another field not shown)



Members never seen



New members (regardless of presence in EHR)



Or filter by specific measure or measure combinations



Next Steps

Actions before the June Data Workgroup



Plan of Action

- The three PHP reports will be copied to health centers this week (health center list on next slide)
- The claims report is more complicated and will be completed before next month's meeting
- Priority was given to the three reports that have timely data and so you can start working with them right away
- This week, look for an announcement e-mail from Aliados Health with an attached instruction brief
- Reports are not available in the aggregate instance of Relevant



First Wave of Health Centers

- Alexander Valley
- Alliance
- Anderson Valley
- Long Valley
- Petaluma
- Santa Rosa
- Sonoma County Indian Health Project
- Sonoma Valley
- West County



Second Wave of Health Centers

- Do any other health centers on the call have monthly membership lists and QIP data being uploaded to Relevant in a standard manner?
- Consistent monthly uploads of membership lists (reports #1 and 2) and QIP denominators (report #3) are required for the report to work. There must also be a matching MPI algorithm established and validated in Relevant
- Monthly claim files (report #4) from Aliados is an emerging project



Feedback Encouraged!

- Remember to send me feedback and suggestions
- It would be great to improve the reports for all health centers so that everybody can benefit from expanded data analysis tools
- A workflow using the data probably needs to be created in an operational environment, rather than a theoretical environment
- There might be additional displayed columns or calculated columns that could be useful to you
- You can send me an e-mail with comments, questions, suggestions, and even the name of the report in your system you modified



Ideas for Next Data Workgroup

- Review feedback on the three reports (and open the floor for additional ideas)
- Implementation guide for Report #4 (claims)
- Explore aggregated data from the reports that you can use to benchmark or add context to your individual health center data



Questions?



Feedback/questions on the reports:
Bfouts@aliadoshealth.org