

## **Revised HEDIS Policy (revised 12/11/2019)**

**'Patient Sharing Status' Field Added:** Providers must disclose to patients their intent to submit patient data to CAIR2 before the data can be submitted (see [CAIR Disclosure/Sharing Policy](#)). A disclosed patient can decide to 'lock' their record to prevent other CAIR users from viewing it. Another type of record that is not available for sharing is an 'undisclosed' birth record. Birth records are loaded into CAIR2 with the 'disclosure' and 'sharing' fields set to "No" but addition of doses either through the user interface or via data exchange automatically converts both 'disclosure' and 'sharing' fields to "Yes". Therefore, by definition, 'undisclosed' records contain no vaccinations. Existing statute ([H&S 120440](#)) prevents 'locked' or 'undisclosed' patient records from being accessed by Health Plans, the Dept. of Health Care Services, or other CAIR2 users.

While CAIR2 will no longer return 'locked' records ('sharing' = "No") in the HEDIS reports, CAIR2 has added a new 'Patient Sharing Status' field to the returned *Patient Info* file indicating the 'status' of each matched patient. Patients who have been 'disclosed' but actively 'locked' their records (disclosure="Yes", sharing="No") will be coded as "L" for locked and not shared. Patients 'undisclosed' and therefore 'locked' by default (disclosure="No", sharing="No") will be coded as "U" for 'undisclosed' and not shared. 'Disclosed' patients who have not chosen to 'lock' their records ('disclosed'="Yes", sharing="Yes") will be coded as "O" for open and shared. Returning the patient status of 'locked' records will assist HPs in interpreting the lack of returned vaccinations and whether provider/ patient follow-up should be initiated.

**Additional Fields Added - Ordering Authority Names and NPI:** For doses submitted through data exchange, HEDIS reports will now export in the *Immunizations Info* file for each dose administered the following additional fields when included in the HL7 message - Ordering Authority (OA) First Name ('OA\_FIRST'), Ordering Authority Last Name ('OA\_LAST'), and Ordering Authority NPI ('OA\_NPI'). These fields will assist managed care plans in determining which contracted providers are responsible for administered doses and additionally, which providers may be eligible for incentive payments as part of the DHCS [Value-Based Payment Program](#). EHR vendors should review [Specific Instructions](#) for sending OA and OA NPI in the HL& VXU message.

Recording of OA and OA NPI is not currently available in CAIR2 for manually entered administered doses but upgrades to the CAIR2 and Account Update software will allow Site OA Names and NPIs to be added to CAIR2 accounts and then chosen from a drop-down list of Site OAs for each administered dose. Once these changes have been implemented, HEDIS reports will contain OA names and OA NPI for manually entered administered doses as well.

[Revised HEDIS Patient Match Specifications](#)