

Marta Visits the North Side Health Center

BPHC UDS Training Case Study

Slide 1: Marta Visits the North Side Health Center

Welcome to the BPHC UDS Training Case Study. This training module is designed to help you understand how to report your patients' stories on the UDS. In this training module, we will tell you the story of Marta, a patient at the North Side Health Center. At the end of the training module, you will have an opportunity to test your ability to translate Marta's story into UDS data. As it may be helpful to reference the story during the knowledge check, a copy of Marta's story is available for download by clicking on the Resources button in the upper right hand corner of your screen. You may also want to download a copy of the UDS tables, also available in the Resources section.

To advance through this module, use the navigation controls at the bottom of the course window or use the menu bar at the left. You may exit the module at any time by clicking on the exit button located in the upper right hand corner of your screen.

Now, let's begin our story.

Slide 2: Chapter 1

Marta, who identifies herself as an African American woman, was born on July 8, 1971. On January 3, 2011, Marta visits the North Side Health Center for the first time during their mass flu-shot drive. Julie, at the front desk, takes her information and tells her that there is no charge for the immunization as the clinic's \$25 charge is covered by a fund from the county for immunizations. The clinic receives \$20 per immunization under its arrangement with the county.

Slide 3: Chapter 2

The flu-shot works and Marta remains healthy until August, when she starts to experience headaches. On August 5th, she returns to North Side to see Dr. Verde, a general practitioner that she has chosen as her primary care provider, about her symptoms. Julie makes a copy of her HMO Green card (private Fee for Service (FFS) Managed Care (MC)). During her visit, she is diagnosed with hypertension (primary diagnosis) and is given a prescription for medication to reduce her blood pressure. When Marta checks out, Julie hands her a receipt showing that the charge for the exam was \$150, that she paid \$10, and that the balance of \$140 would be billed to her insurance.

Slide 4: Chapter 3

On September 17th, Marta visits the health center again for a routine physical exam. She pays a \$10 copay for the visit. Upon bringing Marta to the exam room, the nurse takes and records her height and weight measurements. Because she appears to be of average weight, no further action is taken. Marta is asked about tobacco use and informs Dr. Verde that she used to smoke, but successfully quit at the beginning of the year. A blood pressure reading is taken and it appears that the prescribed medication is working; her results show that her blood pressure is 130/84. Dr. Verde performs a pap test and when results are received, documents them in Marta's record. This time, when Marta checks out, Julie hands her a receipt showing that the charge for the physical was \$100, and that she paid \$10. The charge for the Pap test was \$40, but there is no co-pay associated with it and it will be billed directly to insurance along with the remaining balance for the visit.

Slide 5: Chapter 4

On November 4th, Marta visits the health center once more, but this time to see a dental hygienist for a cleaning and a dentist for an exam. When checking in, Marta tells Julie that she's recently lost her job and is now on Medicaid. Julie makes a copy of the Medicaid card, which covers dental services with a \$10 copay. Marta tells Julie that she'll have to pay later as she did not bring any money with her. She fills out the sliding fee information form which indicates that she is at 130% of the federal poverty level, entitling her to a 50% discount. After the cleaning, Marta is given a bill which shows that she received an exam, a cleaning, as well as bite-wing x-rays for a total of \$175, of which \$165 will be billed to Medicaid, \$5 was granted as a sliding fee discount on her co-pay, and \$5 is unpaid co-pay.

Slide 6: Chapter 5

By the end of December HMO Green has sent the Health Center a payment for \$240 (\$100 for the sick visit, which the remittance indicates is the maximum their contract permits as agreed upon by the contract with the health center, \$100 for the physical based on a contractual agreement, and \$40 for the Pap test). The HMO also sends a \$500 bonus check for controlling hospitalizations of their patients. They report six patients enrolled with the West Side Health Center in December, 2 of whom were only enrolled for 2 months, 3 who were enrolled for the entire year, and Marta who was enrolled from January through October.

Slide 7: Chapter 6

By the end of December, Medicaid has not yet sent payment for Marta's dental visit in November.

Marta does not pay the outstanding \$5 copay that she owes within the Health Center's 30 day policy for writing off outstanding amounts.

Slide 8: A Few Other Facts about North Side Health Center

Remember, Marta's story is only a part of the story of North Side Health Center. Therefore, it is important to note a few additional key facts about North Side Health Center.

- First, the health center considers 40 hours/week to be a full time schedule.
- Dr. Verde worked full time during all of 2011, except when she took 2 months of paid maternity leave. She earned \$95,000. The health center pays \$7,000 per year for her health insurance.
- Julie worked at the health center 20 hours per week from January through June of 2011. Her schedule was increased to 40 hours per week as of July 1st in response to an increase in the patient population.
- Lastly, the health center received a notice of award for \$500,000 in State Government grant funding in February of 2011. As of December 2011, the health center drew down all but \$50,000 of the award; the remainder will be used in 2012.

Slide 9: Resources

Now that you have heard Marta's story, it is time to see how well you can retell it on the UDS. In the following pages, you will be able to answer questions designed to test your understanding of UDS reporting requirements. You will want to download a copy of Marta's story and the UDS Tables so that you can reference them during the quiz. Marta's story and the UDS Tables can be downloaded by clicking on the Resources button in the upper right hand corner of your screen. Also included in the Resources section are UDS Quick Fact Sheets, the narration for this module, and a copy of the knowledge check.

Slide 10: Knowledge Check

Slide 11: Thank you!

Thank you for viewing this training module and for working to provide clean and accurate data to the BPHC. If you are interested in learning more about the UDS reporting requirements and step-by-step instructions for completing the UDS tables, please be sure to visit the other modules available online.