

# **Boosting NCQA Compliance in Complex Case Management**



Amid evolving mandates from the California Department of Health Care Services (DHCS), Managed Care Plans (MCPs) in the state faced the pressing challenge of aligning with the National Committee for Quality Assurance (NCQA) Population Health Management (PHM) standards by 2023 and obtaining further NCQA accreditations by 2026. With DHCS's pending statewide PHM Service launch in Q3 2023, MCPs were under pressure to implement a bias-free Risk Stratification and Segmentation (RSS) approach in line with DHCS's PHM Policy Guide.

In response to these evolving requirements, a leading Managed Medicaid organization serving over 400,000 Medi-Cal members recognized the need to insource and enhance its Complex Case Management services. The organization turned to Clearlink's clinical operations consultants to spearhead and implement Complex Case Management processes, enhance NCQA compliance, and develop insightful reporting dashboards to meet these new challenges head-on.



## The Challenge

The Managed Care Plan (MCP), a key player in California's healthcare landscape, found itself at a crossroads. Having recently transitioned away from an NCQA-accredited partner previously delivering Complex Case Management services, the MCP was ready to insource these services. Its insourcing vision was clear: develop an RSS methodology per DHCS guidelines, enhance Case Management (CM) operations transparency, improve member outcomes, reduce costs, streamline transitions, achieve NCQA accreditation, and amplify reporting capabilities. However, a lack of trained staff and expertise to drive the initiative posed challenges.



## The Solution

Clearlink took a comprehensive and adaptive approach. Beginning with a gap analysis, Clearlink collaborated with the MCP's Director of Case Management. Together they identified the gaps between the plan's traditional CM services and the Complex Case Management models they intended to absorb, leading to a strategic project plan.

Working closely with the medical management, clinical informatics, and quality teams, Clearlink played a pivotal role in the development of the MCP's RSS model. The collaboration entailed in-depth discussions and analyses to identify the most relevant factors contributing to a member's medical risk. Such factors might include medical history, chronic conditions, age, and other relevant clinical indicators. These insights culminated in the formulation of the Risk Stratification model, an essential tool for accurately categorizing members.

## ***The Solution*** (Continued)

In tandem with the model's development, the project required thoroughly reviewing and refining policies, procedures, and workflows to support the new program structure and ensure regulatory compliance. To prepare the team for the successful rollout of these new processes and navigate the intricacies of the new case management model, Clearlink crafted a comprehensive, interactive training curriculum. The curriculum was designed to equip the Case Management team with the knowledge and tools necessary to excel in their roles:

- **NCQA Regulatory Overview** (1.5 hours)
- **Assessment & Planning** (2 hours)
- **Implementation & Evaluation** (1.5 hours)
- **Reassessment, Case Progression, and Closure** (2 hours)
- **Case Studies and Critical Analysis** (2 hours)
- **The Audit Experience** (2 hours)



The training was delivered to the entire Case Management team over the span of two weeks. As the new system was rolled out, stringent audits were conducted to ensure compliance. These audits were comprehensive, as Clearlink met with each case manager and case management leadership to discuss results on a case-by-case basis. 100% of complex cases were audited and re-audited accordingly. Clearlink's hands-on approach ensured that any gaps in knowledge or practice were immediately identified and addressed, with a follow-up plan developed for ongoing mentoring and improvement.



## The Results

Through Clearlink's efforts, the MCP saw significant improvements. A compliant RSS model was swiftly developed, aligning with both DHCS and NCQA requirements. The new Complex Case Management program met all NCQA accreditation verification requirements, setting a trajectory toward reaccreditation. A standout achievement was the leap in NCQA compliance scores, from 63% to an impressive 97%. Additionally, Clearlink created and implemented a tracking and reporting methodology, including a visual dashboard for CM leadership, streamlining its day-to-day oversight.

The collaboration and success of this project have laid a robust foundation for the organization's future insourcing initiatives. With Clearlink's guidance, the MCP achieved its strategic goals, improved compliance, and streamlined clinical operations. The established reporting tools and dashboards now empower the plan to adeptly manage their Complex Case Management operations and make data-driven decisions.

## Key Services Provided

- Risk stratification and segregation model development
- Implementation of an evidence-based assessment
- Policy and procedure creation
- Workflow development
- Comprehensive training curriculum development and delivery
- Detailed auditing tool development according to NCQA Standards
- Ongoing one-on-one mentoring
- Development of reporting capabilities
- CM Dashboard creation and automation
- Staffing analysis compared to industry benchmarks



# Elevate Your Complex Case Management Operations

Link up with Clearlink today.



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## About Clearlink Partners

Clearlink Partners is an independent, industry-leading managed care consultancy specializing in end-to-end clinical and operational management services and market expansion initiatives for Managed Medicaid, Medicare Advantage, Special Needs Plans, complex care populations, and risk-adjusted entities.

We support organizations as they navigate a dynamic healthcare ecosystem by helping them manage risk, optimize healthcare spend, improve member experience, accelerate quality outcomes, and promote health equity.

## Managed Care Made Clear™

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