

Pathways Community HUB Institute National Quality Benchmark Report (QBR)



Reference Guide

Document Version 1.3

Benchmark Report Version 33.1

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Introduction to the PCHI Quality Benchmark Report Reference Guide

The Pathways Community HUB Institute's Quality Benchmark Report (QBR) is a required data reporting tool for Certified Pathways Community HUBs (PCHs) and Pathways Agency (PAs). PCHs and PAs provide quarterly reports to PCHI, and PCHI aggregates this data to develop quality and performance report cards for PCHs and PAs nationally.

This QBR Reference Guide is intended to provide definitions for each field and formulas for any calculated field.

Vendors are required to have the capability of supporting PCHs in generating this data, as well as other relevant reports to support the model to achieve Technology Vendor Certification.

QBR Submission Due Dates and Submission Requirements

QBR Due dates: QBR submissions for a quarter are due on or before the last working day of the month following the previous quarter-end (the last working days of January, April, July, October).

Each QBR submission will reflect up to two years (8 fiscal quarters) of data, unless the PCH or PA has not been operational for that many quarters. In this case, the PCH/PA should provide as many quarters of data as is available. (Note: Additionally, if the PCH/PA has changed technology platforms and has not migrated historical data, fewer quarters may be included.)

Where to access QBR Report templates: The QBR will evolve over time. Updates will be provided no more than twice annually. The most current version of the QBR is always posted on PCHI's website.

How to submit quarterly QBRs: PCHs and PAs will be given access to a secure folder for their organization on PCHI's Box.com account. PCHs and PAs will be able to upload formatted spreadsheets (Excel, or Google Sheets). Each PCH's or PA's folder will be accessible only by PCHI staff and consultants. No other PCH or PA will have access to your organization's data.

Data Use

PCHI staff and consultants utilize QBR data as a component of national Certification and ongoing quality improvement activities.

PCHI aggregates and analyzes QBR data to identify trends and measure quality and performance across all PCHs and PAs. Each Certified PCH and PA will receive feedback on how their PCH/PA is performing compared to averaged metrics from PCHs and PAs nationally.

PCHI does not use QBR data reported by PCHs or PAs for any other purpose, unless a PCH or PA explicitly chooses to participate a specific research project. In this case, PCHI and the PCH/PA will enter into a contractual data use agreement for any specific research project. PCHI will continue to work to identify research and evaluation opportunities for PCHs to participate in.

Definitions of Class and Status for PCHs and Technology Platform Provider Organizations

Please see the PCHI HUB Critical Data Set Definition document for insight into definitions of:

- Participant Age Category
- Pregnancy Info/ Status
- Referral Status, Enrollment Period

Reports below include clients in the Referral Status of *Enrolled*.

Table 1: Enrolled Client

Table 1

Enrolled Client Demographics, Birth Outcomes, CHW Workforce.	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	Total Unduplicated*
Total Clients Served					
By Race:					
American Indian or Alaska Native					
Asian					
Black or African American					
Native Hawaiian or Other Pacific Islander					
White					
Other Race					
2 or more Races					
Total Clients with Pregnancy Pathways Served					
American Indian or Alaska Native					
Asian					
Black or African American					
Native Hawaiian or Other Pacific Islander					
White					
Other Race					
2 or more Races					
Total Postpartum Visits within 7- 84 days					
American Indian or Alaska Native					
Asian					
Black or African American					
Native Hawaiian or Other Pacific Islander					
White					
Other Race					
2 or more Races					
Total Infants (0-12 months) Served					
American Indian or Alaska Native					
Asian					
Black or African American					
Native Hawaiian or Other Pacific Islander					
White					
Other Race					
2 or more Races					
Total Non-Pregnant Adults (>17 years old) Served					
American Indian or Alaska Native					
Asian					
Black or African American					
Native Hawaiian or Other Pacific Islander					
White					
Other Race					
2 or more Races					

By Ethnicity:						
Total Clients Served						
Hispanic or Latino						
Not Hispanic or Latino						
Total Pregnant Clients Served						
Hispanic or Latino						
Not Hispanic or Latino						
Total Postpartum (Pathways) Visit within 7- 84 days						
Hispanic or Latino						
Not Hispanic or Latino						
Total Infants (0-12 months) Served						
Hispanic or Latino						
Not Hispanic or Latino						
Total Non-Pregnant Adults (>17 years old) Served						
Hispanic or Latino						
Not Hispanic or Latino						
Adults with 2 or more chronic diseases (Future)						
# CHWs Total Employed (i.e., all CHWs including partial FTEs)						
# CHWs Total FTE Equivalents (i.e., 2 CHWs at 1/2 FTE = 1 FTE Equivalent)						

This report represents clients that meet the following requirements:

1. They are confirmed to have received a home visit assessment (a Checklist or Visit Form and Progress Form during any of the quarters being reported). During 2022, due to COVID-19's impact on home visits, visits that occurred at any location or via phone/video may be included here.)
2. The client is not duplicated during a quarter even if they received multiple home visits, unless they meet the condition below.
3. The client *may be duplicated within a quarter* if they fit into more than one category during that quarter (pediatric, adult, pregnant). (Example: an 18-year-old client is enrolled in services for housing insecurity. Later in the same quarter, she has a Pregnancy Pathway opened. She would be counted as a Pregnant Client served, and as a non-pregnant Adult.)
4. Client is counted in each quarter in which he/she is served, but not counted more than once in the Total Unduplicated Column.

Definitions:

1. **Total Clients Served** – Unique individuals with any number of Visit Forms in a specific quarter.
2. **Total Clients with Pregnancy Pathways Served** – All clients served who had an open Pregnancy Pathway during the reported period.
3. **Total Postpartum Visits (Pathways) within 7-84 Days** – This is the total number of clients who completed the Postpartum Pathway within **7-84** days after delivery during the quarter.
4. **Total Infants (0-12 months) Served** – This is the total number of unique infants aged 0-12 months who were served during the quarter.

5. **Total Non-Pregnant Adults (>17 years old) Served** – This is the total number of unique clients older than 17 who were served and who did not have an open Pregnancy Pathway during the period of measurement.

Note: Clients that turn 18/become adults during a quarter should only be counted once for the quarter. They should be counted based on their age at the beginning of the quarter.

6. **Race and Ethnicity Subsections**

- These subsections which provide detail on client counts by Race and by Ethnicity.
 - Race rows include:
 - Subtotals by Race: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or other Pacific Islander, White, Other Race, or 2 or more Races if client reported being more than one Race. *Note: If client reports being of more than one Race, they should be included in the 2 or more Races column, and not also in each other race specified.*
 - If your PCH or PA has added more granular Race sub-categories to track clients Race, these subcategories should be rolled up into the correct Race category above. *Do not provide more detailed information than is included in the PCHI Quality Benchmark Template or QBR Reference Guide.*
 - Ethnicity rows include:
 - Subtotals by Ethnicity of the client specifying either Hispanic or Latino, or Not Hispanic or Latino.
 - If your PCH or PA has added more granular Ethnicity sub-categories, these subcategories should be rolled up into the correct Ethnicity category above. *Do not provide more detailed information than is included in the PCHI Quality Benchmark Template or QBR Reference Guide.*

7. **COLUMN: Total Unduplicated Clients** - This is the total of unique clients seen over the previous four quarters. If a client was seen in Q1, this client would count as 1 Unduplicated Client. If a client was seen in Q1, and again in Q2 - this client would count as 1 Unduplicated Client. *This column is not a sum of the previous 4 columns.*

8. **Adults with 2 or more Chronic Diseases** - This is the total number of unique Clients with documentation of 2 or more chronic diseases. *This is a future reporting requirement.*

9. **# of CHWs Total Employed** - This is the total number of unique community health workers that provided any service to a client during the period being reported, regardless of their FTE status or the number of hours they worked.

10. **# of CHWs Total FTE Equivalents** - This is the number of community health workers employed during that month, based on FTE % information. For example, two ½ FTE CHWs equal one FTE equivalent.

Table 2: Low Birth Weight Metrics

Table 2

Low Birth Weight (includes only clients receiving > 1mo of PCH intervention and does not include plural births)	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	2 Year % LBW and 2 year %VLBW Only
Total Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
By Race:									
American Indian or Alaska Native Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
Asian Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
Black or African American Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
Native Hawaiian or Other Pacific Islander Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
White Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
Other Race Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
2 or more Races Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
By Ethnicity:									
Hispanic or Latino Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%
Non Hispanic or Latino Births - Total # Births	-	-	-	-	-	-	-	-	
# Singleton, Normal Birth Weight Only									
# Twins or multiple birth pregnancies									
# Singleton LBW Births									0.00%
# Singleton LBWs that were VLBW Births									0.00%

Definitions:

- **Low Birth Weight** includes only clients receiving > 1mo of PCH intervention and does not include plural births)
- **Normal birth weight (NBW)** is defined as greater than or equal to 2500 grams or 5 pounds eight ounces
- **Low birth weight (LBW)** is defined as less than 2500 grams or 5 pounds eight ounces. Note LBW numbers include babies born Very Low Birth Weight (VLBW)
 - **Very low birth weight (VLBW) - this is a subset of Low Birth Weight (LBW)** is defined as LBW babies weighing less than 1500 grams or 3 lbs. 4oz

11. **Total Births** – This is the total of all unique babies born for the quarter, to clients who have received at least one month of PCH intervention. This is the sum of all Singleton or Multiple Birth babies (i.e. twins, each twin baby counted), including NBW and LBW babies.
- **Total Births (Singleton, NBW Only)** – This is the total of all singleton NBW births that were born during the period of measurement.
 - **Total Births (Twins or Multiple Birth pregnancies)** – This is the total of all twin or multiple births for the quarter and includes both NBW and LBW babies. Note that each birth from a multiple birth pregnancy should be counted separately (e.g. twin births would count as 2).
 - **# Singleton LBW Births** – This is the total of all singleton births that were born LBW and VLBW during the period of measurement.
 - **# Singleton LBWs that were VLBW Births** - This is the total of all singleton births that were born VLBW during the period of measurement (this is a subset of the row above).
 - **Total Singleton %LBW** = the number of LBW babies divided by the total of LBW plus NBW.

EQUATION: Summary %LBW = #LBW / (All Singleton Births)

- **Total Singleton %VLBW** = the number of VLBW babies divided by the total of VLBW plus NBW.

EQUATION: Summary %VLBW = #VLBW / (All Singleton Births). Note: LBW includes VLBW within the numeric value)

Subsets of these totals are broken down by race and ethnicity in subsequent rows.

12. **COLUMN: 2 Year % LBW** - The 2 Year % LBW calculated as the sum of all Singleton LBW Births divided by the sum of all singleton births. Sum of all singleton births includes normal births plus LBW births. **(It is important that this is not calculated by averaging the percentages for all quarters.)**
13. **COLUMN: % VLBW** is calculated as the sum of all Singleton VLBW Births divided by the sum of all singleton births. Sum of all singleton births includes Normal births plus LBW births. Note that LBW births include all babies below 2500 grams including those VLBW that are less than 1500 grams.

Table 3: Visits and Enrollments

Table 3

Average # of Visits and Enrollment Period (Days)	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	2 Yr. Avg.
Total Number Home Visits, all Clients*									0
Number of Home Visits Infants (0-12mo)									0
Number of Home Visits Pediatrics (over 1 and <18 Years Old)									0
Number of Home Visits Adult (>17 years old)									0
Number of Home Visits Pregnant									0
Average Length of Enrollment (<18 years old) (days)									0
Average Length of Enrollment Adults (>17 years old) (days)									0
Average Length of Enrollment Pregnant (days)									0

Definitions:

- **Home Visit** – Completed home visit is defined as 1 completed Visit Form and 1 updated Progress Form for the same visit, with the Visit type = any. *Note: Due to COVID-19, many PCHs and PA needed to pause Home Visits for different intervals in both 2021, and potentially in 2022. For this reason, all Visits which include a Visit Form and Updated Progress Form may be counted as a Home Visit during this period. As the PCHI Model is a home or community- visit based care model, home visits are still encouraged when safe, and compliance with PCHI Standard 7.*
14. **Total Number of Home Visits, all Clients** – total number of home visits provided by PCH/PA during the specified quarter. More than one home visit may be noted for a single client, if visits occurred on different days.
 15. **Number of Home Visits Infant Clients (0-12 months)** - This is the total number of home visits made to clients aged 0-12 months during the quarter.
 16. **Number of Home Visits Pediatrics (<18 years)** - This is the total number of home visits made to clients aged 1-17 years 364 days during the quarter.
 17. **Number of Home Visits Adult (>17 years old)** - This is the total number of home visits made to clients over the age of 17 during the quarter.
 18. **Number of Home Visits Pregnant** – This is the total number of completed home visits made to clients with an open Pregnancy Pathway during the quarter.
 19. **Average Length of Enrollment of Pediatric Clients (<18 Years Old) (Days)** – The average number of days a client, who was enrolled in the program prior to their 18th birthday, was enrolled. This period begins when the Initial Visit Form is completed and ends when the client is discharged from the program, even if the individual turns 18 during their enrollment.
 20. **Average Length of Enrollment of Adult Clients (>18 Years Old) (Days)** – The average number of days a client, who was enrolled after their 18th birthday, was enrolled. The enrollment period

begins when the client's first Visit Form is completed and ends when the client transitions to a status of Discharged from the program, or if/when the client has a Pregnancy Pathway opened.

21. **Average Length of Enrollment Pregnant** - The average number of days a client with a Pregnancy Pathway, regardless of age, was enrolled. The enrollment period begins when the client's Pregnancy Pathway is opened and ends when the client transitions to a status of Discharged from the program, or if/when the client has a Pregnancy Pathway closed.
22. **COLUMN: 2 Year Average** – (Average for data available). Sum of data in 8 quarters shown, divided by 8. If the PCH has less than 2 years of data the denominator is equal to # of quarters of available data.

Table 4: Pathways Risk Reduction Report

Table 4

Pathways - Risk Reduction Report	# Finished Incomplete by Quarter				# Incomplete Annual (past 12 months)	# Completed by Quarter				# Completed Annual (past 12 months)	% Complete Annual (past 12 months)	Median # of Days to Complete Annual (past 12 months)
	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX		Q2 20XX	Q3 20XX	Q1 20XX	Q2 20XX			
Adult Education					-					-	0.00%	
Behavioral/Mental Health					-					-	0.00%	
Employment					-					-	0.00%	
Food Security					-					-	0.00%	
Healthcare Coverage					-					-	0.00%	
Housing					-					-	0.00%	
Immunization Referral					-					-	0.00%	
Learning	-	-	-	-	-	-	-	-	-	-	0.00%	
<i>Learning Module Detail to include 1 row for each Learning Module Code (expand section by pressing "+" to the left to see list)</i>												
Medical Home					-					-	0.00%	
Medical Referral	-	-	-	-	-	-	-	-	-	-	0.00%	
<i>Medical Referral Detail to include 1 row for each Medical Referral Code (expand section by pressing "+" to the left to see list)</i>												
Medication Adherence					-					-	0.00%	
Medication Reconciliation					-					-	0.00%	
Medication Screening					-					-	0.00%	
Oral Health					-					-	0.00%	
Social Service Referral	-	-	-	-	-	-	-	-	-	-	0.00%	
<i>Social Service Referral Detail to include 1 row for each Social Service Referral Code (expand section by pressing "+" to the left to see list)</i>												
Substance Use					-					-	0.00%	
Transportation					-					-	0.00%	
Pediatric Specific												
Developmental Referral					-					-	0.00%	
Pregnancy Specific												
Family Planning					-					-	0.00%	
Pregnancy					-					-	0.00%	
Postpartum					-					-	0.00%	
Number of Outcome Based Units (OBUs)												
Total Risk Reduction Outcomes/Pathways		-	-	-	-	-	-	-	-	-		

Table 4 – Learning Module Detail

Table 4 – Medical Referral Detail13

Table 4 – Social Service Detail

Social Service Referral	-	-	-	-	-	-	-	-	-	-	-	0.00%	
Social Service Referral Detail to include 1 row for each Social Service Referral Code (expand section by pressing "+" to the left to see list)													
Clothing					-						-	0.00%	
Identification					-						-	0.00%	
Personal Items					-						-	0.00%	
Home Improvement					-						-	0.00%	
Household Items					-						-	0.00%	
Internet					-						-	0.00%	
Lead Abatement					-						-	0.00%	
Phone					-						-	0.00%	
Safety Equipment					-						-	0.00%	
Utilities					-						-	0.00%	
Intimate Partner Violence					-						-	0.00%	
Child Abuse					-						-	0.00%	
Elder Abuse					-						-	0.00%	
Family Crisis Services					-						-	0.00%	
Restorative Services					-						-	0.00%	
Child Development					-						-	0.00%	
Citizenship					-						-	0.00%	
Corrections					-						-	0.00%	
Daily Activities of Living					-						-	0.00%	
Fatherhood					-						-	0.00%	
Financial					-						-	0.00%	
Legal					-						-	0.00%	
Literacy					-						-	0.00%	
Medical Debt					-						-	0.00%	
Parenting Education					-						-	0.00%	
Tax Preparation					-						-	0.00%	
Translation Services and/or Interpretation					-						-	0.00%	
Voter Registration					-						-	0.00%	
Adult Day Care					-						-	0.00%	
Childcare					-						-	0.00%	
Respite Services					-						-	0.00%	
Other					-						-	0.00%	
Substance Use					-						-	0.00%	
Transportation					-						-	0.00%	

Definitions:

- Pathways Completed – Pathways that have a status of Complete (as marked by the Supervisor)
- Pathways Finished Incomplete – Pathways that have a status of Finished Incomplete (the Pathway was closed by CHW, but the goal was not achieved)

*Note: This table does **not** include Pathways that are still in an Open status.*

23. **Pathways – Risk Reduction Report – rows from **Adult Education through Postpartum - Each of these rows represent the** number of the specified Pathways in that reporting period including,**
- Finished Incomplete
 - Complete by quarter as well as the median length of time of all completions\incompletions.
 - **Pathways Details** – detail rows for each of the service Type Codes provided within the Pathway. These subsections exist for the:
 - Learning Pathways
 - Medical Referral Pathway
 - Social Service Pathway

24. **Number of Outcome Based Units (OBUs)** - This is the number of OBUs completed in this quarter. PCHI provides a nationally approved registry of OBU values by Pathway. Reporting on this field is required as of July 1, 2021.

EQUATION:

#of[Pathway x]*OBU value[Pathway X]+ #of[Pathway y]*OBU value[Pathway y]... for all 21 Pathways.

25. **Total Risk Reduction Outcomes/Pathways** - Totals for each of the columns.
26. **COLUMN: # Complete Annual** - the sum of all Finished Complete Pathway for the previous four quarters.
27. **COLUMN: % Completed Annual** - Represents the percent of Pathways completed. Measured over the last 4 quarters. Pending Pathways are not part of this equation.
- EQUATION:**
- # Completed / (#Completed + # Finished Incomplete)***
28. **COLUMN: Median Time (# of days) Annual** - the 12-month median time (not average) from Pathway initiation to Pathway completion.
29. **COLUMN: # Incomplete Annual** - The sum of all Finished Incomplete Pathways for the previous four quarters.

Table 5: Referrals

Table 5								
Referrals	Q2 20XX	Q3 20XX	Q4 20XX	Q1 20XX	Total	# In Progress	# Enrolled	# Can't Find
MCO Referrals								
HUB Local Referrals								

30. The number of referrals initiated by quarter and the total of all referrals initiated by quarter
- **# In Progress** – Number of referrals that are active and not completed yet.
 - **# Enrolled** - # of referrals that resulted in enrollment
 - **# Declined** - # of referrals where contact was made with the client and they denied services
 - **# Can't Find** - # of referrals where appropriate attempts were made to locate the client and they were unable to be found or enrolled. The referral now is closed and no longer active.

Table 6: Document Revision History

Date	Revision #	Change
2/4/22	1.3	<ul style="list-style-type: none"> • Edited some language for clarity and to insert updated visuals of QBR Tables. No material changes.
01/24/22	1.2	<ul style="list-style-type: none"> • Tables 1 and 2 modified to create separate sections for Race and for Ethnicity reporting • Table 3 has been revised to reflect that Home Visits, for 2021 and 2022 include any type of visit that includes a completed Visit and Progress Form, due to limited home visiting possibility during the COVID-19 pandemic. • Row for Number of OBUs was moved from Table 1 to Table 3. • Table 4 - Detailed subsections have been added to report on Learning, Medical Referral, and Social Service Pathways.
9/9/21	1.09	<ul style="list-style-type: none"> • Tables 1 and 2 modified to include revised Race/Ethnicity Categories • Table 4 - Detailed subsections have been added to report on Learning, Medical Referral, and Social

Service Pathways.