

Redesigning the collection of home health care data in the Medicare Current Beneficiary Survey (MCBS).

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Agenda

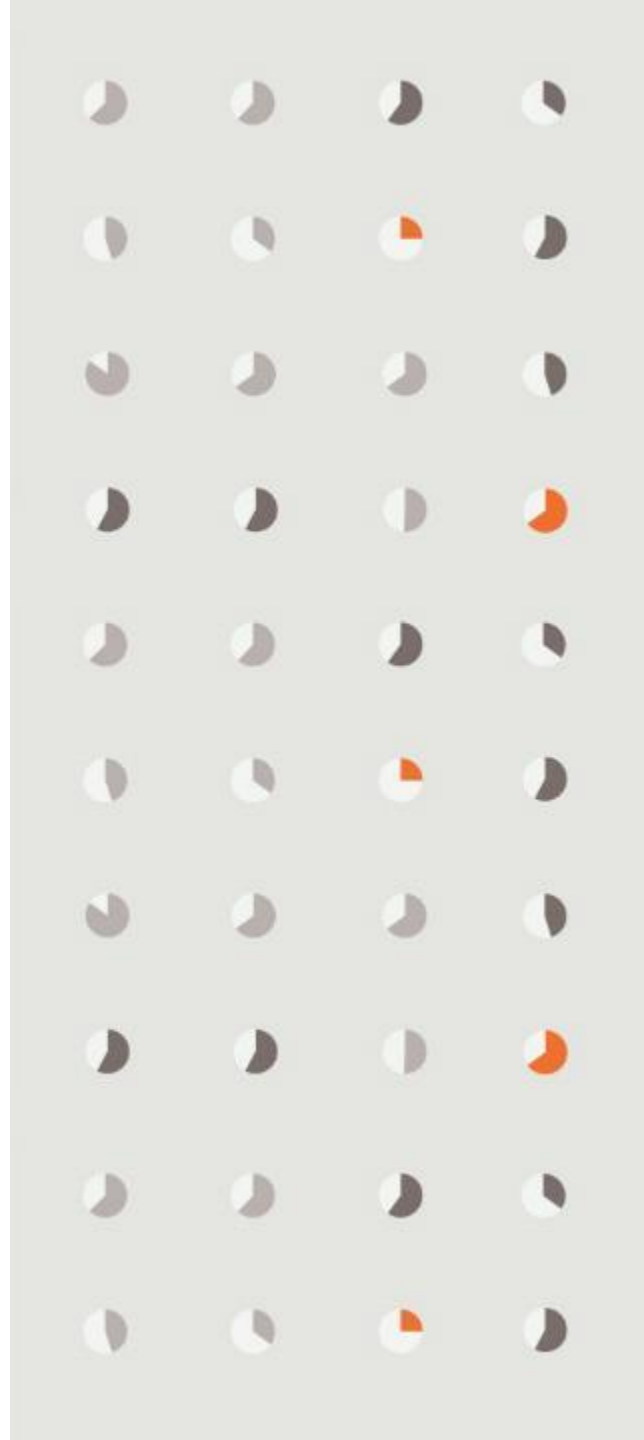
01 Background

02 Home Health Care in the MCBS

03 The Redesign

04 The End Result

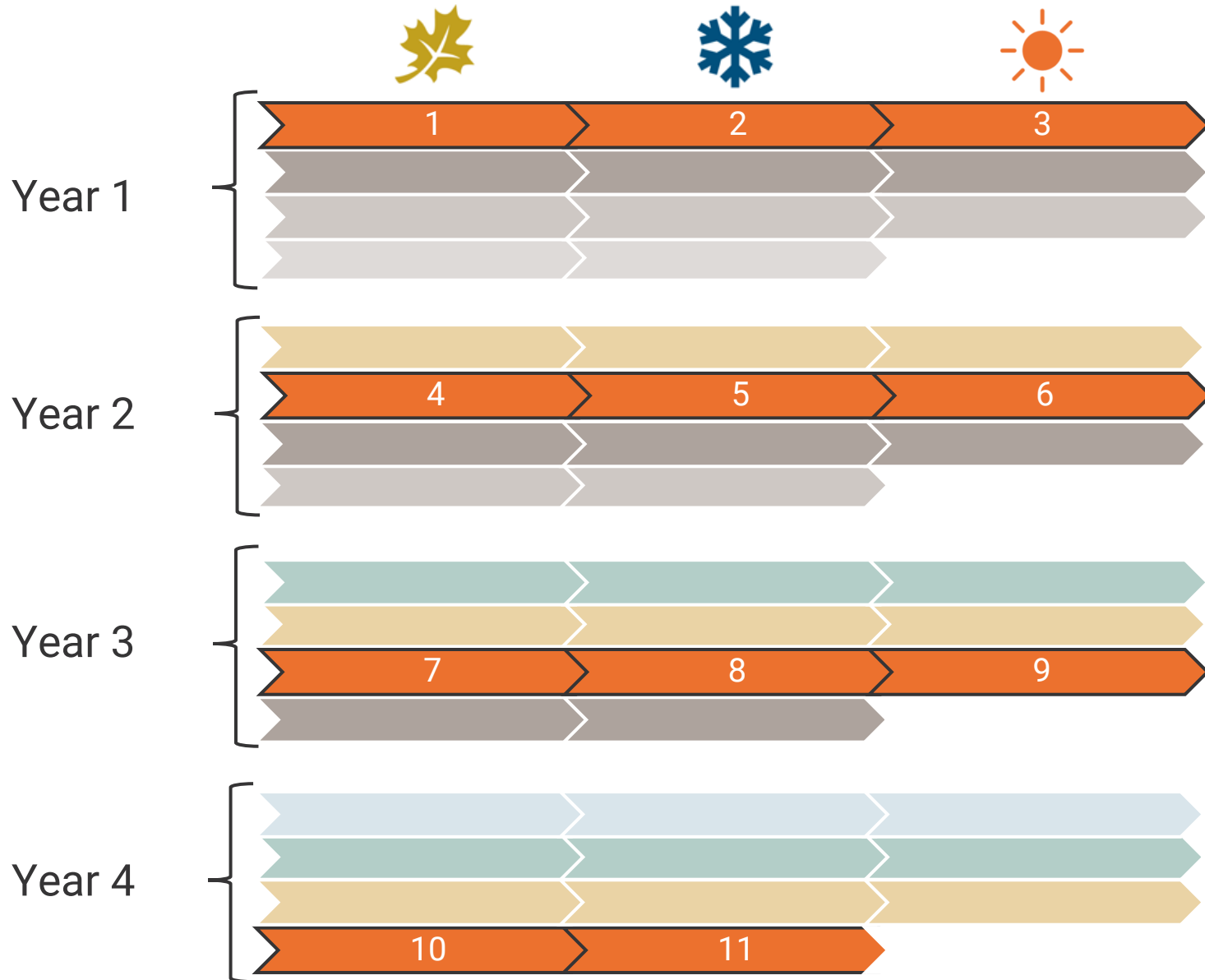
05 Discussion and Conclusion



What is the MCBS?

- The Medicare Current Beneficiary Survey (MCBS) is a continuous, multi-purpose longitudinal survey.
- The MCBS represents the population of Medicare beneficiaries aged 65 and over and beneficiaries aged 64 and under with certain disabling conditions living in community and facility (long-term care) settings in the United States.
- The MCBS is sponsored by the Office of Enterprise Data and Analytics (OEDA) of the Centers for Medicare & Medicaid Services (CMS) and is conducted through a contract with NORC at the University of Chicago (NORC).
- The MCBS is the most comprehensive survey available on the Medicare population and is essential in providing important information on beneficiaries, including:
 - Sociodemographics
 - Access to and satisfaction with care
 - Health status and functioning
 - Health care costs and utilization

MCBS Round-based Rotating Panel Design



Data Collection and Processing



The MCBS employs an enumeration-based approach to collecting medical events and prescription medicines.

- Respondents report event and medicine details within a certain time period with the aid of available documentation, such as calendars and prescription drug labels.



Claims matching

- CMS matches survey-reported events and medicines to Medicare claims to enhance self-reported data.
- Prescription medicine claims are only available for beneficiaries enrolled in Part D.

Home health care is a **growing** area highly relevant to analysts and policymakers.

Medicare coverage for home health care is available for...¹

- Beneficiaries who are homebound with a home health care order from a medical provider for qualifying skilled services.
- Medicare-certified home health agencies only.

In 2016...

- 6% of Medicare beneficiaries used home health care.²
- Medicare paid \$18.1 billion for home health care.²

¹ Center for Medicare Advocacy (2021). Fact Sheet: Medicare Coverage for Home Health Aide Care. Retrieved from <https://medicareadvocacy.org/wp-content/uploads/2021/07/CMA-HH-Fact-Sheet-7-2021.pdf>

² U.S. Department of Health and Human Services (2016). 2016 CMS Statistics. Retrieved from https://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/CMS-Statistics-Reference-Booklet/Downloads/2016_CMS_Stats.pdf

The MCBS collects details about several types of **health care events** and **associated costs**.

- Survey data are matched to Medicare claims and released as **event-level segments** in the Cost Supplement Limited Data Sets (LDS) file.
- The existing Home Health Questionnaire (HHQ) design was **not** capturing the information necessary to:
 - Match to Medicare Fee-for-Service claims.
 - Produce a home health event-level segment.
- CMS and NORC collaborated to redesign the HHQ to **support the creation of a home health event-level segment** by:
 - Evaluating the existing design.
 - Identifying elements of the preferred design.
 - Developing a plan for a redesigned HHQ.

First, a multi-pronged approach was used to evaluate the **existing** HHQ data collection and data structure design.

To evaluate the existing design, we...

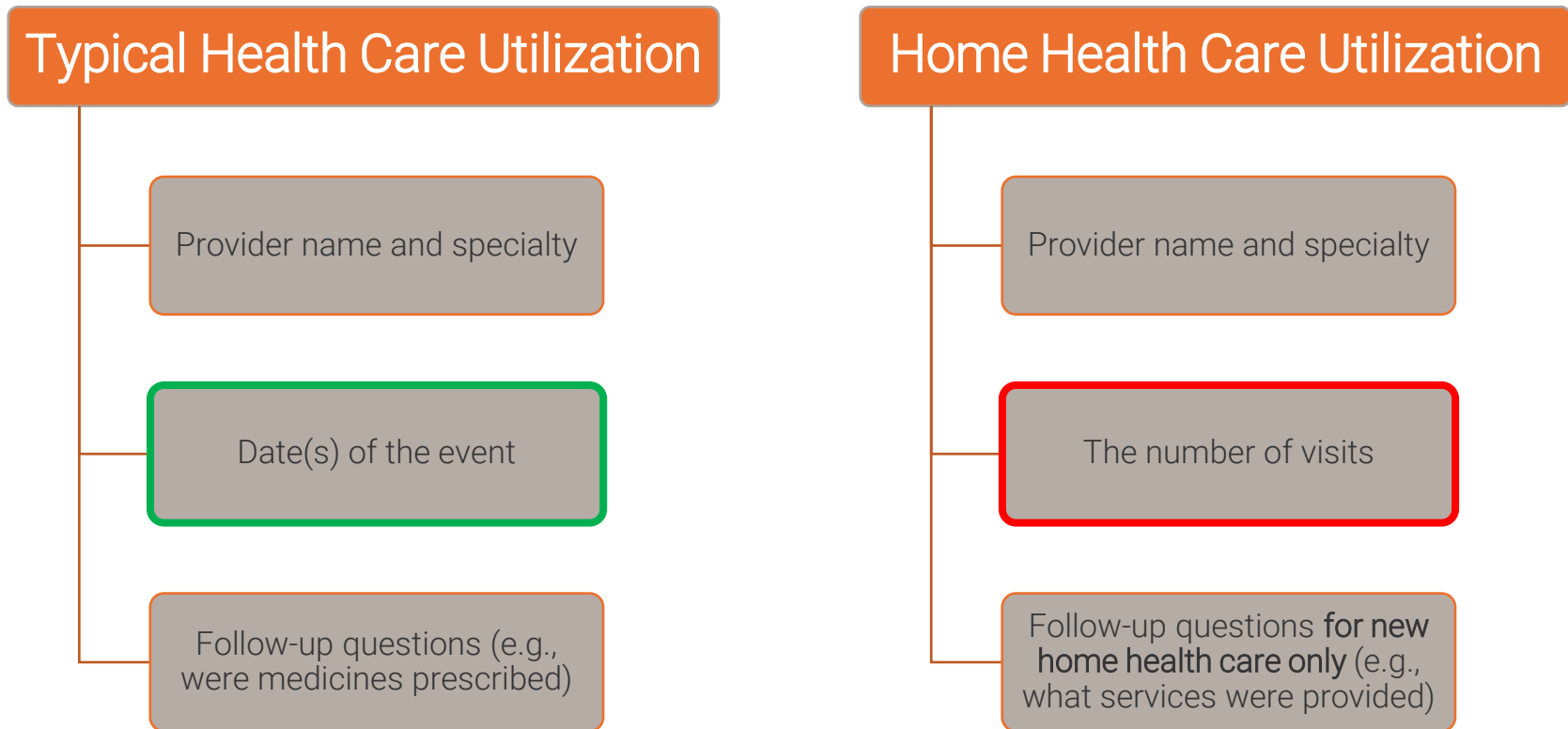
- Reviewed questionnaire specifications and code.
- Reviewed MCBS home health data.
- Consulted with interviewers to understand limitations.
- Identified similarities and differences between home health events and other events (e.g., medical provider) to explore mirroring home health data collection after existing approaches.

The existing HHQ had several limitations that impeded Medicare claims matching and the collection of **up-to-date, comprehensive data** on home health care utilization and costs.

The existing HHQ data collection design...

- Did not capture some of the information required to match to Medicare claims (e.g., date of service).
- Did not provide an opportunity to confirm or update information about recurring events (e.g., services provided).
- Did not allow for complete collection of all costs (referred to as “cost resolution”) if events recurred across multiple data collection rounds.

Collecting event dates is important for 1) **resolving costs** in the questionnaire and 2) Medicare **claims matching** in post-processing.



Next, the **preferred** design was informed by health care research, policy, and the increased ability to link survey and claims data.

To define the preferred design, we...

- Evaluated the structure of other MCBS health care event LDS segments.
- Reviewed literature on other federal surveys that collect home health care data.
- Scanned relevant home health policy resources.
- Collaborated with CMS to identify fields needed to match to Medicare claims.

The **redesigned** HHQ was ultimately modeled after an existing questionnaire section, the Medical Provider Questionnaire (MPQ).

The MPQ data collection and data structure design was ideal because...

- There are similarities between home health and medical provider claims.
- MPQ effectively collects key information related to repeat visits, which simplifies cost resolution (i.e., collecting the total cost of a health care event).
- There were questionnaire administration benefits to modeling HHQ after MPQ:
 - Interviewer familiarity with MPQ data collection structure.
 - Leveraged existing MPQ code to program redesigned HHQ.

All home health care data that will be released as part of the 2021 LDS¹ were collected under the redesigned HHQ.

Major questionnaire changes include...

- Updates to question text and variable names.
- Addition/deletion of variables.
 - Added name of attending physician to facilitate claims matching.
 - Removed variables collecting information not necessary for LDS production (e.g., length of provider stay).
- Updates to skip logic.

Example Change:

The existing HHQ collected the number of times a home health provider came to the home during a specified timeframe. The redesigned HHQ will collect **exact event dates**.

¹Anticipated release 2023

Under the redesigned HHQ, the data structure of home health events will be similar to medical provider events.

- Recurring events across data collection rounds will be treated as unique events.
- Recurring events (≥ 5) **within** a data collection round will have an event record for each month service is provided.
- Creating a unique event record for both scenarios simplifies:
 - Cost resolution in the questionnaire.
 - Analyses of home health care utilization and costs both at the beneficiary-level and for the MCBS population as a whole.

Key Feature:

Data elements collected under the redesigned HHQ will **facilitate linking** of survey-reported home health care events to Medicare claims data.

The MCBS supplements CMS administrative data with critical sociodemographic and health-related data.

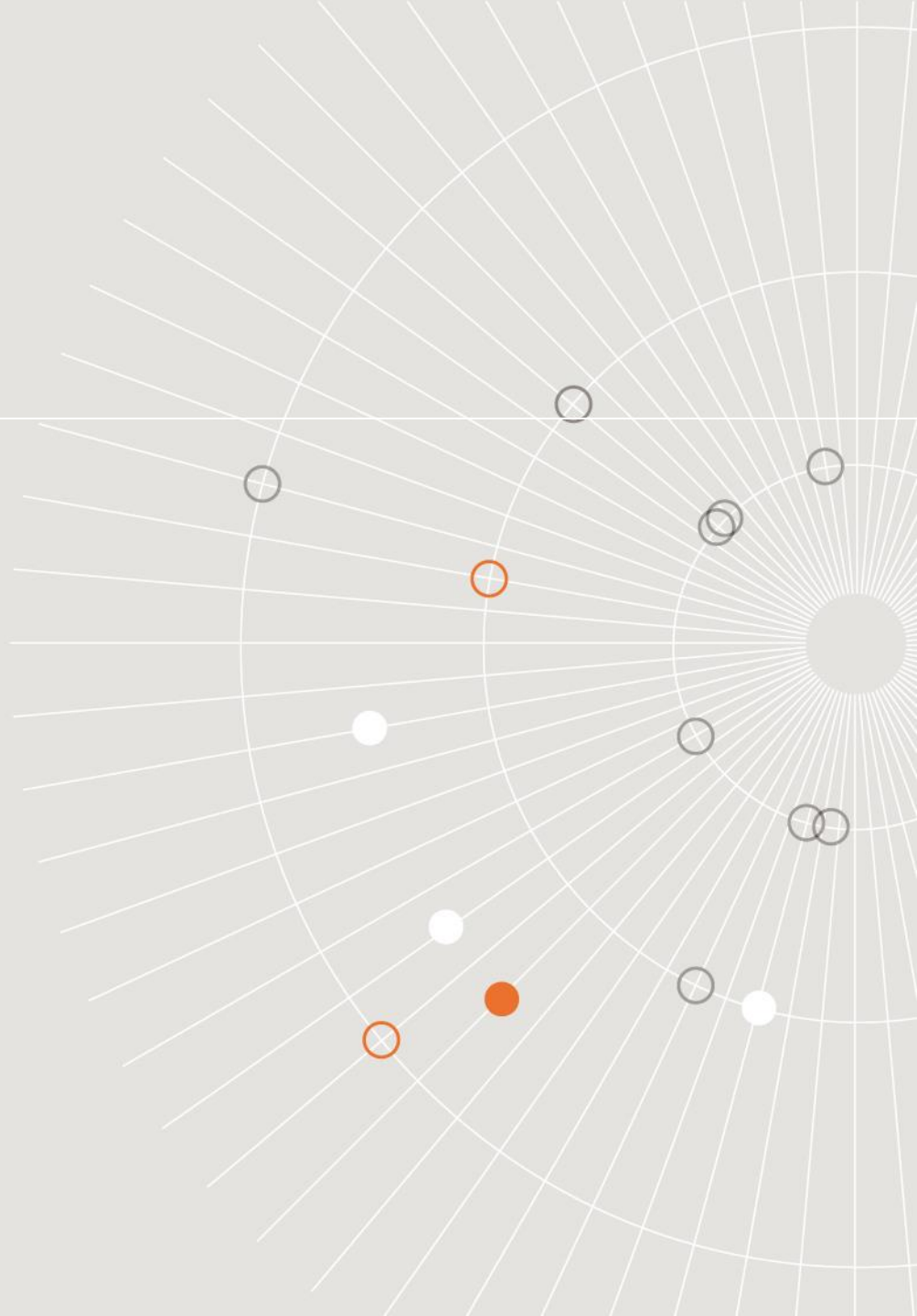
- As the prevalence of home health care use grows among the Medicare population, so does the need for accurate and comprehensive data on the subject.
- Other surveys can adapt this redesign approach to ensure questionnaires are relevant and responsive to evolving contexts.
- The redesigned home health data will be released with the **2021 LDS**.¹
- 2021 MCBS home health data will better support a range of analyses.

Innovations in the Redesign:

The redesign used a **multi-pronged** approach that **leveraged existing design elements**.

¹ <https://www.cms.gov/Research-Statistics-Data-and-Systems/Research/MCBS>

Questions?



Thank you.

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