

Rhode Island Quality Institute

Sending Summary of Care Documents Electronically

for Improved Care Transitions and to Meet Meaningful Use

September 29, 2016

Presenters:

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Agenda

- Why is it important to send a Summary of Care (SoC) document electronically?
- What does Direct look like and does it work?
- How can Eligible Providers meet Meaningful Use (MU)?
- How do I send a SoC record electronically?
- How do I get a Direct account?
- Where can healthcare providers find Direct addresses?
- How do I to get help?



Why Is It Important to send SoC electronically?

- Saves time - patient matching, data entry
- Improves care coordination
- Important to MU and beyond
- Many use cases:
 - Primary care sending referral or to hospital
 - Specialist sending consult notes
 - Hospital sending to responsible care provider
 - SNF sending to Home Health



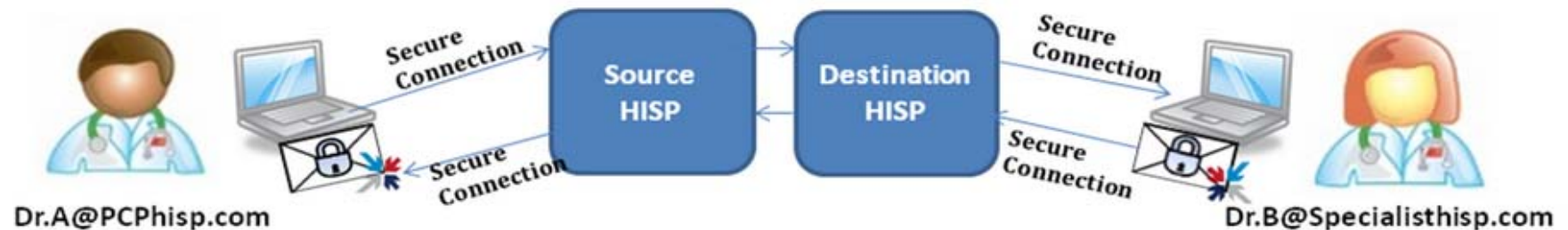
What Direct looks like...

One time setup:

2 parties trust each other



Ongoing Secure Emails:



Health Information Service Provider (HISP)



How Direct is working in real life!

- Create trust relationship
- Generate an electronic referral & attach a Transition of Care Summary
- Send to specialist's Direct



University Internal Medicine, Inc.
Primary, Comprehensive and Continuing Care

“We love this process! It saves time because we don’t have to FAX anymore.”

***Amanda Perry
& Amber Aptt***



Objective 5: Health Information Exchange

Eligible Professional EHR Incentive Program Objectives and Measures for 2016 Objective 5 of 10

Date updated: February 4, 2016

Health Information Exchange	
Objective	The EP who transitions their patient to another setting of care or provider of care or refers their patient to another provider of care provides a summary care record for each transition of care or referral.
Measures	The EP that transitions or refers their patient to another setting of care or provider of care must (1) use CEHRT to create a summary of care record; and (2) electronically transmit such summary to a receiving provider for more than 10 percent of transitions of care and referrals.
Exclusion	Any EP who transfers a patient to another setting or refers a patient to another provider less than 100 times during the EHR reporting period.

See CMS Spec sheet for full details on Objective 5



Objective 5: Health Information Exchange

Attestation Requirements

DENOMINATOR/NUMERATOR/THRESHOLD/EXCLUSION

- DENOMINATOR: Number of transitions of care and referrals during the EHR reporting period for which the EP was the transferring or referring provider.
- NUMERATOR: The number of transitions of care and referrals in the denominator where a summary of care record was created using CEHRT and exchanged electronically.
- THRESHOLD: The percentage must be more than 10 percent in order for an EP to meet this measure.
- EXCLUSION: Any EP who transfers a patient to another setting or refers a patient to another provider less than 100 times during the EHR reporting period.

Summary of care record must include current problem, medication and medication allergy list

See CMS Spec sheet for full details on Objective 5



Transitions within ONE organization?

Q: Can a transition occur within an organization, from one program to another, or must it be external? *(to count for MU)*

A: “In cases where the providers share access to an EHR, a transition or referral may still count toward the measure if the referring provider creates the summary of care document using CEHRT and sends the summary of care document electronically. If a provider chooses to include such transitions to providers where access to the EHR is shared, they must do so universally for all patient and all transitions or referrals.”

(taken from CMS spec sheet for Obj. 5, under “Additional Information”)



Sending SoC Documents electronically

- **2014 CEHRT is required to have Direct functionality OR other way to electronically transmit SoC (Modified Stage 2 MU)**

NOTE: Electronic FAX does not meet measure unless by 3rd party

- **Ask your EHR vendor what is workflow to meet Objective 5?**
 - How do I send a Summary of Care (SoC) record electronically?
 - How do I set up Direct?
 - How do I use Direct email addresses for providers with a *different* EHR platform?
 - Where can healthcare providers find Direct addresses?
- **You can use Direct outside of EHR to meet Objective 5**



EHR-specific Workflows

Workflows for different EHRs? (Ask/ look at MU Guide for Obj. 5)

- Amazing Charts – use with Updox for Direct/Secure message
- Athenahealth – from referrals, select “email” with CCD attached
- CareTracker – request account, send in application, activate
- ClaimTrak
- eClinical Works – us “P2P” portal with eCW and non-eCW providers
- Epic
- NextGen
- Greenway, Intergy/Vitera, others...



Asking non-eCW providers to join P2P?

Q: How do you send a SoC document to providers not in the P2P network?

A: You need to ask them to join P2P network— sample invite:

Subject: (Dr. Name at ABC Practice) requests you please consider joining eCW P2P network for improved care coordination

Dr. Name appreciates the opportunity to refer patients to you at _____ (name of referral practice).

We'd like to have you learn more about sending and receiving transitions of care/referral documents electronically using the eClinical Works "P2P Open". This is really critical for our practice and for providers across the country who are trying to improve Transitions of Care and achieve Meaningful Use.

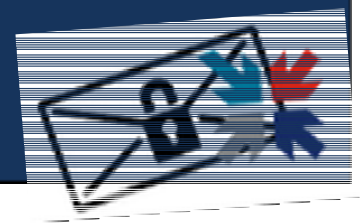
P2P Open helps improve quality, safety and efficiency of care. By joining the network you can instantly connect with thousands of medical professionals and care providers. It allows you to securely send and receive clinical information for improved coordination of care. Please visit this link to learn more and to request an account: <https://p2popen.com/mobiledoc/jsp/dashboard/login.jsp>

Please let me know if you have any questions, and I look forward to using P2P with you in the near future!

Best, _____ (signature)



Sending SoC outside of your EHR



- How can you use Direct outside of EHR?
- Get a Direct account from a HISP vendor
- Requires manually tracking numerators/denominators
 - Use excel tracking sheet
- May send SoC records/referrals to:
 - Other Direct addresses
 - Non-Direct addresses (per functionality of HISP)
- Example: (see Inpriva hDirect mail handout for screenshots)



Workflow tool

	A	B	C	D	E	F	G	H	I
1	MU2 Summary of Care (SOC) Tracking Sheet								
2	Goal: this tool will allow you to track the organizations you refer to and the status of sending Summary Of Care documents to those organizations								
3									
4	Organization we refer to	Referrals/Yr (estimated # or High/Med/Low)	Main Contact Name	Main Contact Email or Phone	FAX #	Have Direct? (Yes/No)	Direct Address	Date of First Successful Transmission of SOC	Comments
5	Example: Gastroenterologist A	High	Name of Contact	Preferred Phone	401-xxx-xxxx	Yes	GastroA@TEST.org	9/29/2014	9/29/14 - successful transmission & informed staff to use going forward 9/19/14 - sent test message 9/18/14 - received address 8/29/14 - reached out to practice
6									
7									
8									
9									
10									
11									

“Comments” correlate to steps you need to take:

1. Reach out to practice
2. Receive Direct address
3. Send test message
4. Successful transmission
5. Inform staff to use going forward



Where can I find Direct addresses?

It's not easy, but they are out there!

- [RIQI DIRECTory](#)
- Call & ask practices/hospitals
- HISP vendor directories (Surescripts, etc.)
- EHR Vendor network – eCW (P2P)

Organization	Provider	Direct Address
Aaron Way, Osteopathic Family Medicine LLC - 401-284-4555	General Site Account	aaron_way@osteopathicfamilymedicine.amazing-direct.com
Ann M Frank PsyD		ann.frank@greenvillepsychology.hin2.us
Apple Valley Family Treatment Center - 401-949-2010	General Site Account	familytreatmentcenter@av.hin2.us
Aquidneck Medical Associates, Inc. - Newport - 401-847-2290	General Site Account	notify@direct.aquidneckmed.com
Aquidneck Medical Associates, Inc. - Portsmouth - 401-683-2290	General Site Account	notify@direct.aquidneckmed.com
Arcand Family Medicine - 401-828-2663 - Contact: Marcia Mallette	General Site Account	arcandfamilymedicine@affinity.direct.carene.org
Associates in Primary Care Medicine, Inc. - 401-467-3115	General Site Account	staff@direct.apcmweb.md
Blackstone Valley Center for Internal Medicine - 401-762-2535	General Site Account	not5gierg@bvcim.hin2.us



Need help sending SoC electronically?

Our RIQI team is here to support you!



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Next Steps

- Check with your Vendor
- If necessary, obtain a Direct Account
- Contact us directly for more detailed information for these EHRs:
 - Amazing Charts
 - Athenahealth
 - CareTracker
 - eClinical Works



Questions



Resources

We will send electronically:

- Slides from this presentation
- Link to recorded webinar
- [Direct Resources](#) from RIQI

Links:

- CMS specification sheet for ToC: https://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/Downloads/2016EP_5HealthInformationExchangeObjective.pdf
- RI Executive Office of Health & Human Services
<http://www.eohhs.ri.gov/ProvidersPartners/ElectronicHealthRecordsEHRIncentiveProgram.aspx>
- Certified Health IT Product List
<http://oncchpl.force.com/ehrcert>

