2015 Certification Criterion

Transition of Care – Receive and Reconcile

Medicare Promoting Interoperability (Meaningful Use) Objective:

- Measure: Health Information Exchange: Support Electronic Referral Loops by Receiving and Reconciling Health Information. Hospitals have three options when attesting to the HIE Objective:
  - Option 1: Submit data for the HIE Send and HIE Receive Measures
  - Option 2: Bi-directional Exchange (requires an automated CCDA Interface)
  - Option 3: Exchange with TEFCA (requires partnership with CommonWell or another certified QHIN)

- Measure: For at least one electronic summary of care received for patient encounters during the EHR reporting period for which an eligible hospital is the receiving party of a transition of care or referral, or for patient encounters during the EHR reporting period in which the eligible hospital has never before encountered the patient, the eligible hospital conducts clinical information reconciliation for medications, problems, and allergies.

- Possible Points: 15

- Medicare Exclusion: None

***NOTE: The hospital denominator will show the number of electronic summary of care (CCDA) records received and imported** using CEHRT for patient encounters during the EHR reporting period. The numerator is met when clinical information reconciliation is completed using CEHRT for the following three clinical information sets: Medication, Medication Allergy, and Current Problem List.*

NOTE: Clinical Reconciliation must be performed after the summary of care is imported.

Importing Documents

There are THREE methods for importing CCDA documents:

- Import from Inbox: Importing CCDA documents received via direct messaging.

- Querying an HIE/HIN: Importing CCDA documents from an HIE/HIN using an interface.

- Querying CommonWell: Importing CCDA documents from CommonWell.

Importing a CCDA via Import from Inbox

Importing a CCDA is the only way to update the denominator for the hospital measure Health Information Exchange: Support Electronic Referral Loops by Receiving and Incorporating Health Information.

To import a CCDA that was delivered in a direct message, the user will need to access the Health Information Resource application via the patient's chart.

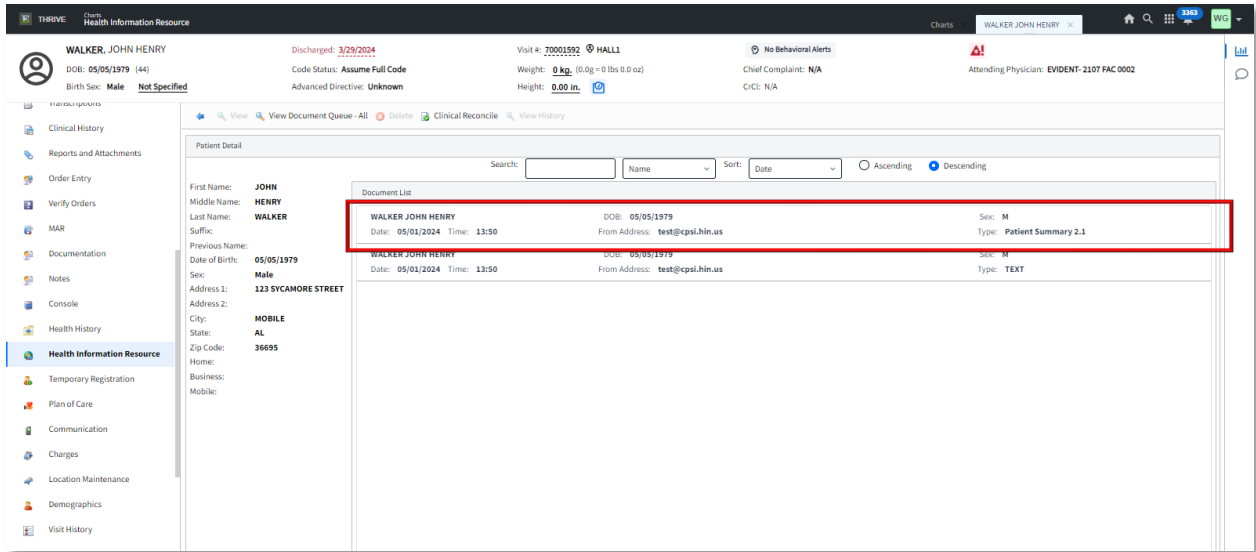1. In Web Client, select **Charts > select patient > Health Information Resource > Import from Inbox**.
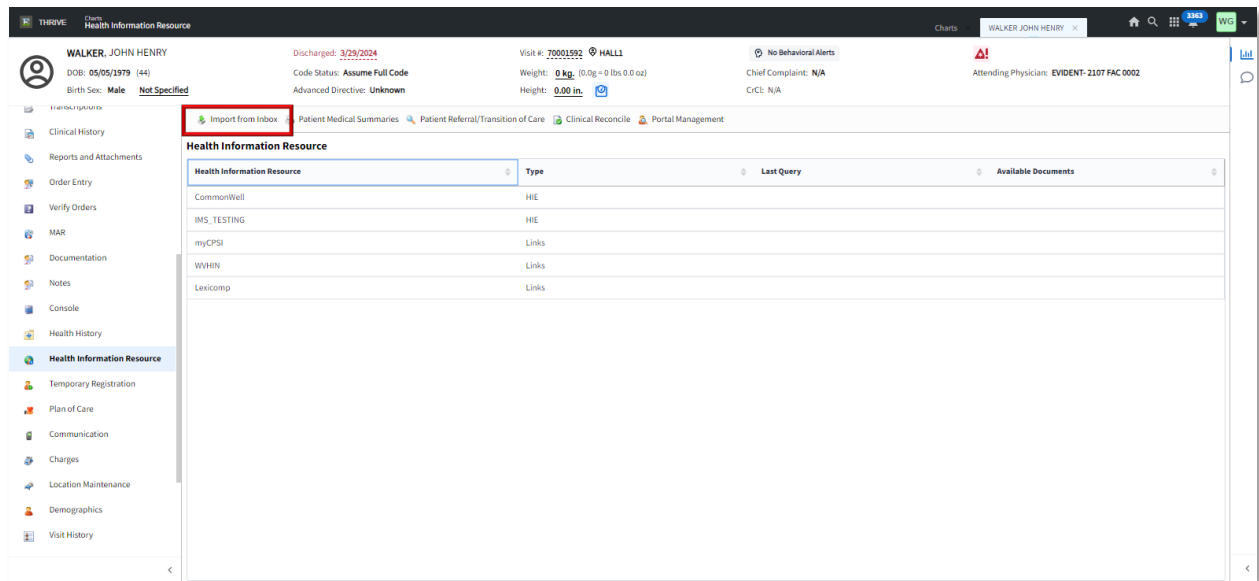
2. The screen will list documents that match the selected patient. The patient matching is based on the patient's first name, middle name, last name, suffix, previous name, date of birth, address, phone numbers and birth sex.

   If no document displays based on the automatic patient matching, select the **View Document Queue – All** button to view all documents in the Inbox for the Direct address. To return to the matched set of documents, select the **View Document Queue – Match** button.

   NOTE: Import from Inbox can also be access through Charts, or through a POC Virtual Chart tab.

3. Double-click on the CCDA in the Document List to view the CCDA.

4. Once the CCDA is selected, the action bar provides a few options:

*   **Import:** This option allows users to import the CCDA so the information from the CCDA can be reconciled. Importing the CCDA places the patient in the denominator. Once **Import** has been selected, a copy of the imported CCDA is saved in Electronic File Management. Once **Import** is selected, it is not possible to cancel the import.

*   **Print:** This option allows users to print the CCDA to a specific printer, to the user's workstation, or to a PDF.

*   **View XML:** This option allows users to view the XML of the CCDA.

*   **View Errors:** This option allows users to review any errors, warning, or information regarding the document validation display.
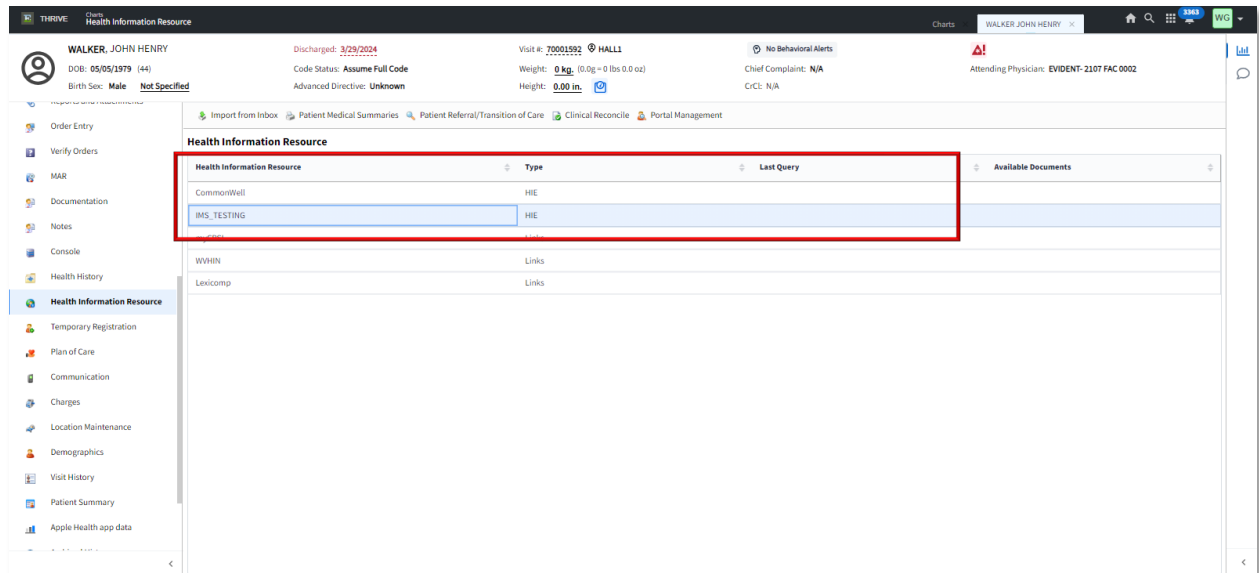
Imported CCDA documents can be viewed in the following locations:

- Web Client > Charts > Reports and Attachments > Med Rec

- Web Client > System Menu > POC Access > POC Virtual Chart > Images > Imported CCDA will have a Document Origin of Imported

- Web Client > System Menu > Medical Records > Acct Number > Electronic File Management

Importing a CCDA via an HIE Query

Importing a CCDA via an HIE/HIN (Health Information Network) query is another way to include the patient in the denominator of the measure. The hospital must have an interface to an HIE/HIN that can actively query CCDAs to meet this measure.
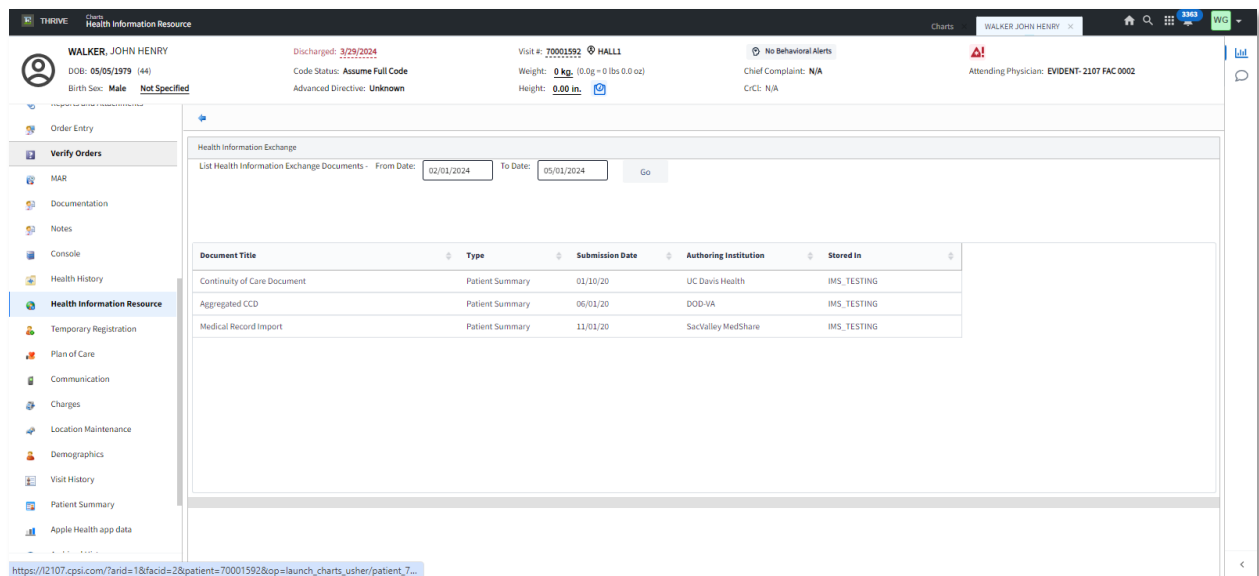
1. In Web Client, select **Health Information Resource > Select the HIE > View CCDA > Import**.

2. Double-click on the HIE to query. Once selected, the EMR will automatically query the HIE for any CCDA documents for the previous three months.
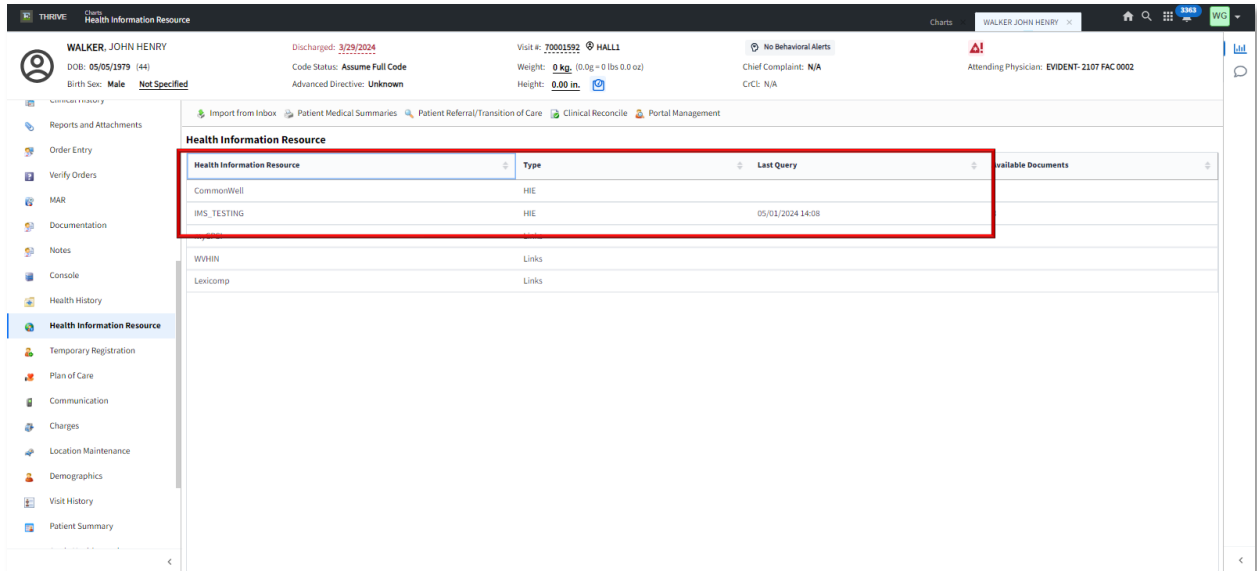
NOTE: The date range to query can be manually changed.

If a document is returned, it will be available in the Inbox to View and Import (refer to screen shot shown above). If a document is not returned, the database has stored that a query was performed. Importing a document will include the patient in the measure denominator.

Importing a CCDA via CommonWell

CommonWell can be used to query and import CCDA documents for the HIE – Receive and Reconcile measure. If your facility is not a member of CommonWell, you can locate signup details on TruLearn.

The steps to Querying CommonWell are identical to Querying an HIE. In Web Client, select Health Information Resource > Select CommonWell > View CCDA > Import.
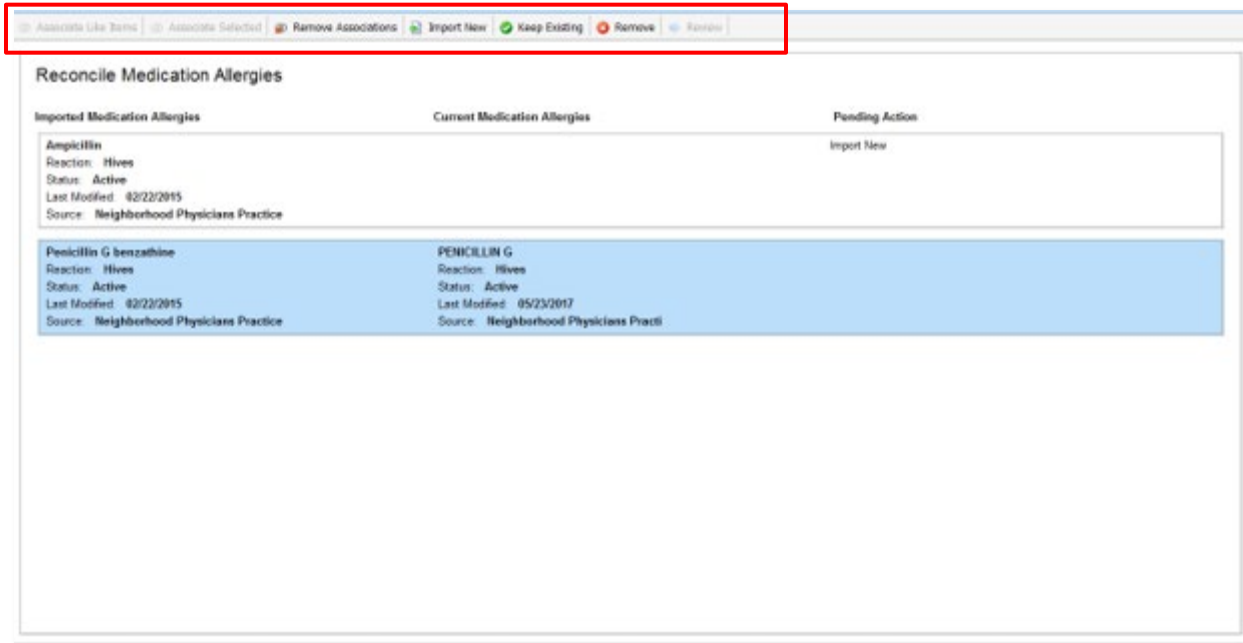

Performing Clinical Reconciliation

All three Clinical Reconciliations may be performed in Health Information Exchange > Clinical Reconcile, or within their respective applications, and **all three reconciliations must be performed for the patient to meet the measure numerator**.
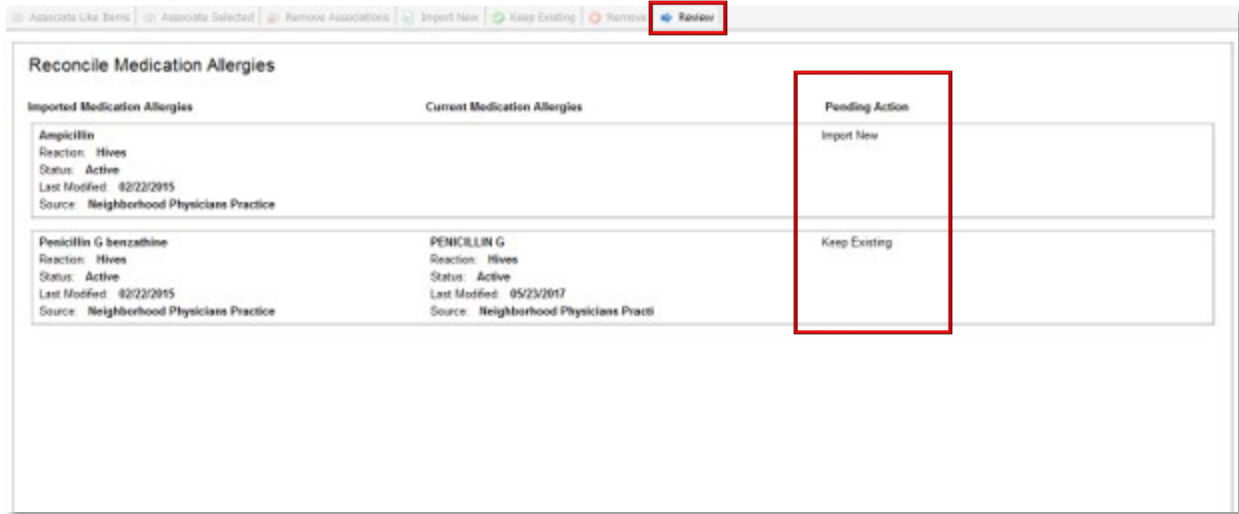
Reconciling Allergies

1. In Web Client, select **Charts > Select Patient > Allergies**.

    -   Imported allergies are listed under the **Imported Medication Allergies** column. Existing allergies are listed under the **Current Medication Allergies** column.

    -   **Associate Like Items** will automatically associate imported and current allergies based on the RxNorm code. Users can also manually associate and remove associations.
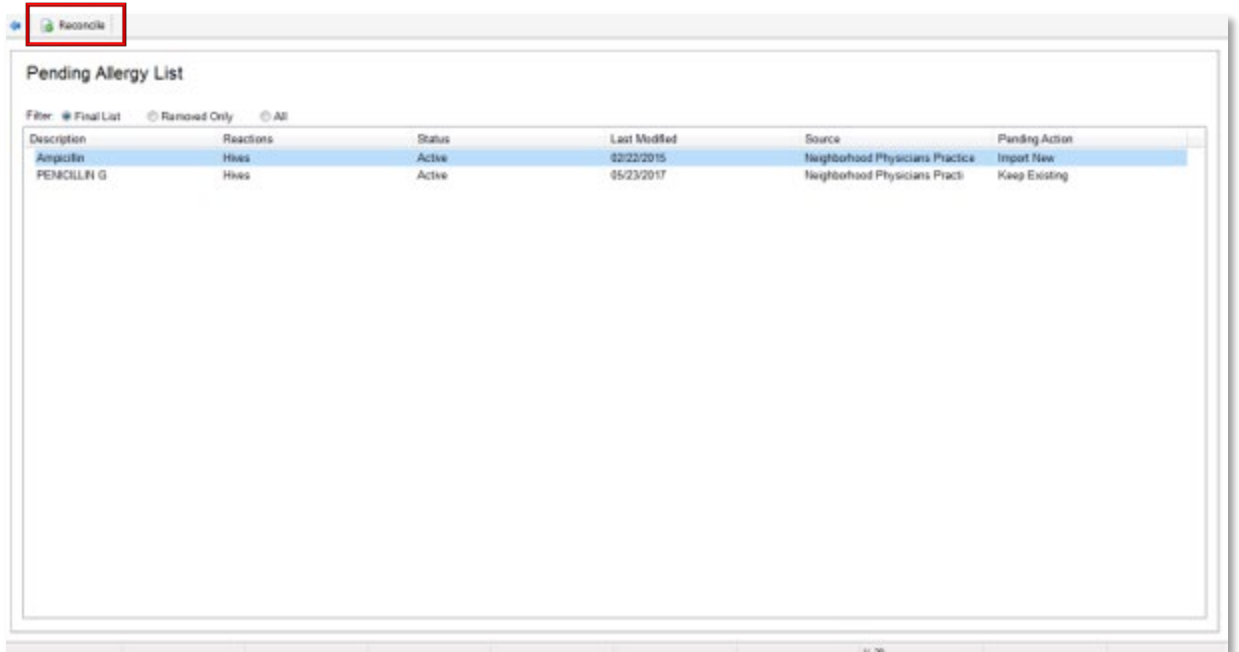
Reconcile Medication Allergies

Imported Medication Allergies	Current Medication Allergies	Pending Action
Ampicillin Reaction: Hives Status: Active Last Modified: 02/22/2015 Source: Neighborhood Physicians Practice		Import New
Penicillin G benzathine Reaction: Hives Status: Active Last Modified: 02/22/2015 Source: Neighborhood Physicians Practice	**PENICILLIN G** Reaction: Hives Status: Active Last Modified: 05/23/2017 Source: Neighborhood Physicians Practi	

- Additional options include the ability to **Import New**, **Keep Existing**, or **Remove**.
  - **Import New:** This option will mark the selected imported allergy with a pending action of Import New, which will add that allergy to the patient's allergy list upon reconciling.
  - **Keep Existing:** This option will mark the selected current allergy with a pending action of Keep Existing, which will retain that allergy on the patient's allergy list upon reconciling.
  - **Remove:** This option will mark either an import or current allergy with a pending action of Remove. If an imported allergy has Remove selected, that allergy will be deleted upon reconciling (and not become part of the patient's allergy list). If a current allergy has Remove selected, that allergy will be removed from the patient's allergy list upon reconciling.

2. Once all items on the screen have been addressed, the **Review** button will become available. To proceed, select **Review**.

3.   Selecting **Review** takes the user to a final pending list. The selected pending action will appear in the **Pending Action** column.

4.   Once the list has been visually verified, select **Reconcile** to reconcile the data into the patient's chart.

Reconciling Medications and Problems

Reconciling Medications and Problems follows the same process as Reconciling Allergies.

Path to Reconcile Medications: In Web Client, select Charts > Select Patient > Medication Reconciliation or Prescription Entry (or Clinical Reconcile in Health Information Resource).

- Imported medications will be listed under the **Imported Home Medications** column. The existing medications will be listed under the **Current Home Medications** column.

- Users can Associate Like Items, manually associate, remove associations, Import New, Keep Exist, or Remove.

- The list is reviewed for accuracy and then reconciled into the patient's chart.

Path to Reconcile Problems: In Web Client, select Charts > Select Patient > Problem List (or Clinical Reconcile in Health Information Resource).

- Imported problems will be listed under the **Imported Problems** column. The existing problems will be listed under the **Current Problems** column.

- Users can Associate Like Items, manually associate, remove associations, Import New, Keep Exist, or Remove.

- The list is reviewed for accuracy and then reconciled into the patient's chart.
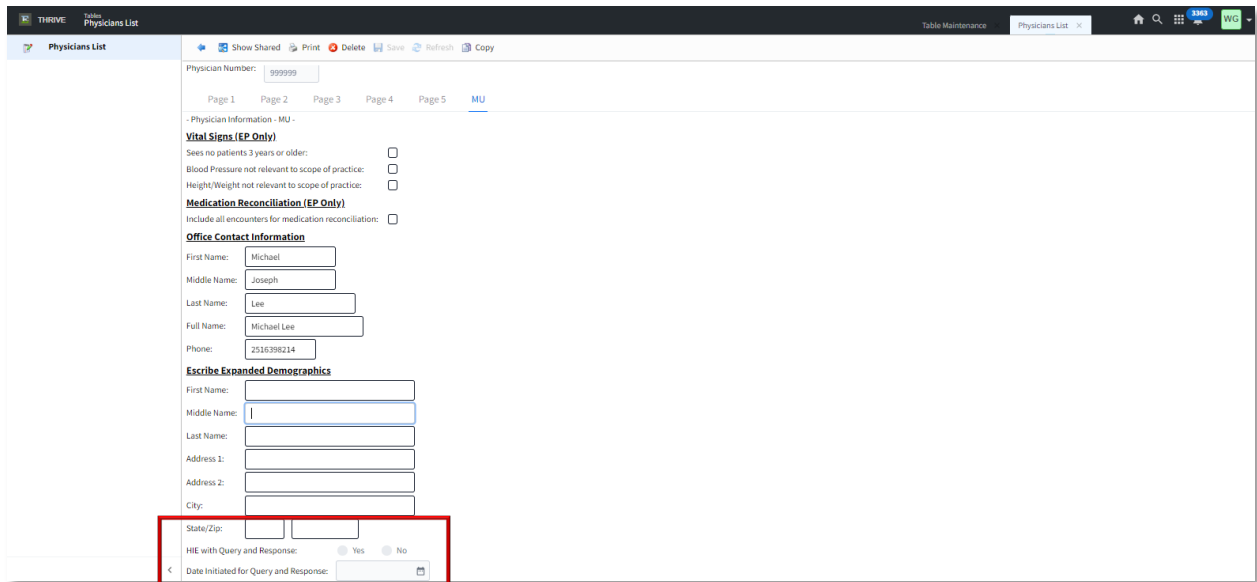
Setup

Setup for PIX (HIE) Query

If the hospital has an interface that can ***actively query*** an HIE for CCDA documents ***and retrieve*** the CCDA documents, the **Yes** radio button for **HIE with Query and Response** must be set on the MU page of test physician 999999.

If the hospital does not have an HIE in its area ***OR*** if the HIE interface is not yet operational in the TruBridge EHR for the facility, the **No** radio button will be set. Only when the HIE interface is operational should the **HIE with Query and Response** field be set to Yes.

Path to set up PIX Query access in the hospital: Web Client > Tables > Clinical > Physicians > Test Physician 999999 > MU page > HIE with Query and Response

Setup for Image Titles

In order for the CCDA documents to upload correctly into the EHR, the HIE Image Titles and CCDA Image Titles need to be set up.

Recommended Image Titles to set up:

- Patient Summary
- Referral Note
- Discharge Summary
- Unspecified Document

Recommended Setup for HIE Image Titles:

- **Currently Used:** Select this checkbox.

- **Image Deletion Allowed:** Select this checkbox.

- **ChartLink Tab:** Select Med Rec (Medical Records). This is where the imported document will display within Reports and Attachments.

- **Clinical History:** This is an optional field. If you want the imported document to display in Clinical History, then select the MR checkbox.

- **Page Properties:** Use the default settings.

Path to set up the HIE Image Titles: Web Client > Tables > Business Office > Images: Titles
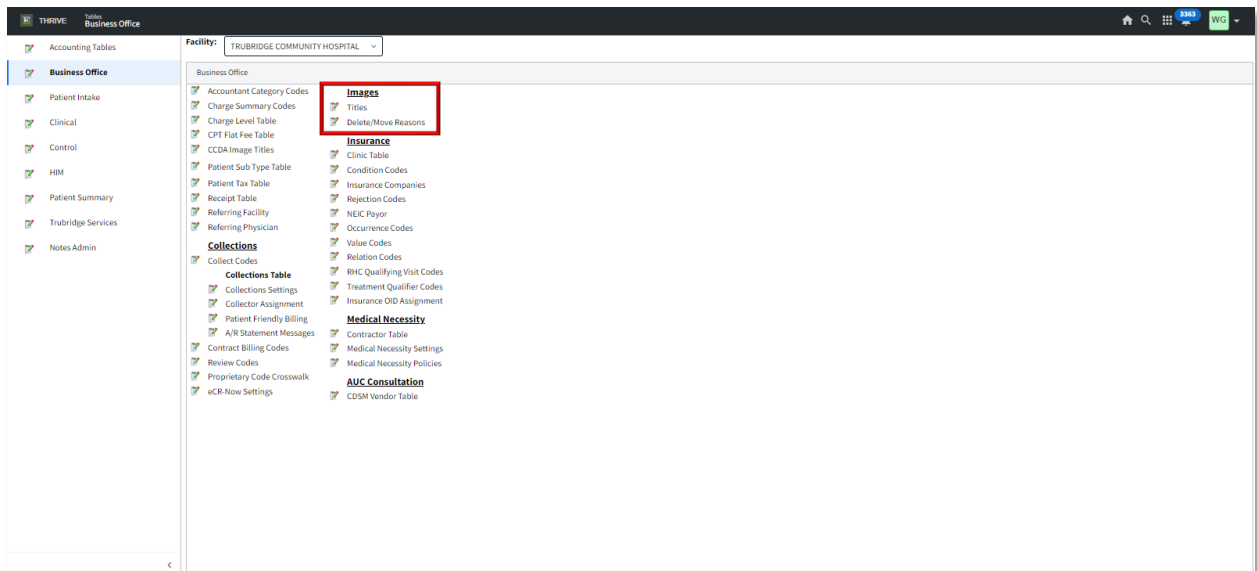
Use the settings below to set up your CCDA Image Title and select **Save**. Repeat the process for all CCDA Image Titles recommended.

There are four document types to which image titles need to be associated:

- CCD

- Discharge Summary

- Referral Note

- Unspecified Document

IMPORTANT! Each document type needs to have its own specific image title so that the EMR can accurately store the document in Print EMR based on the document OID.

To associate the image title, select the magnifying glass next to the document type. The list of image titles will appear. Highlight the image title and select **OK**. The image title will now be associated with that document type.
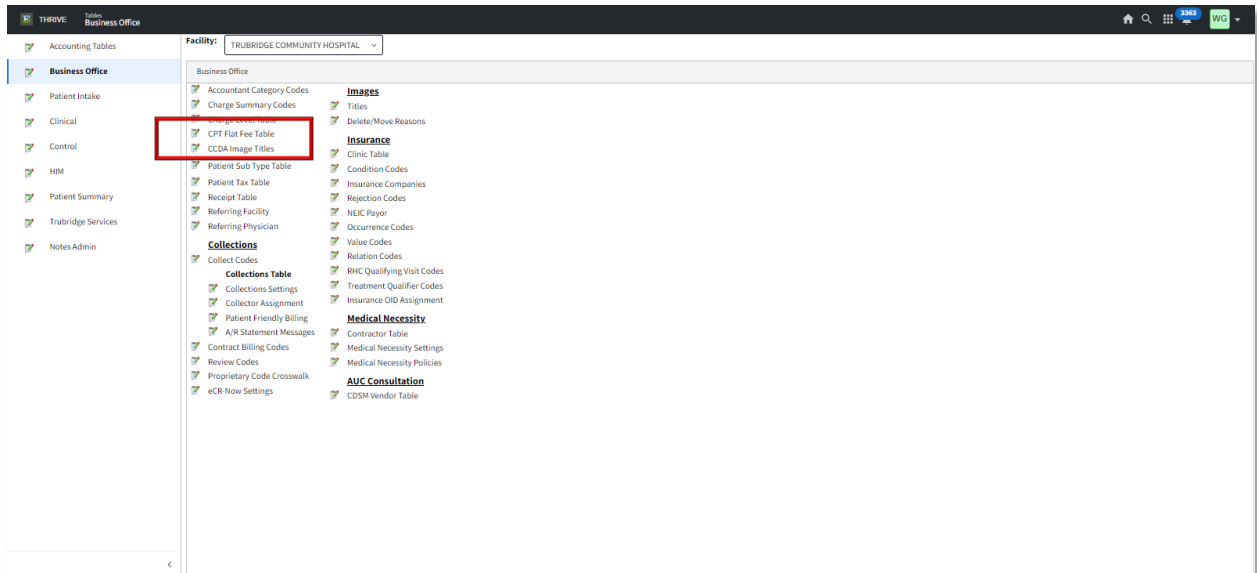
The facility's CCDA Image Titles setup should look similar to the example below.
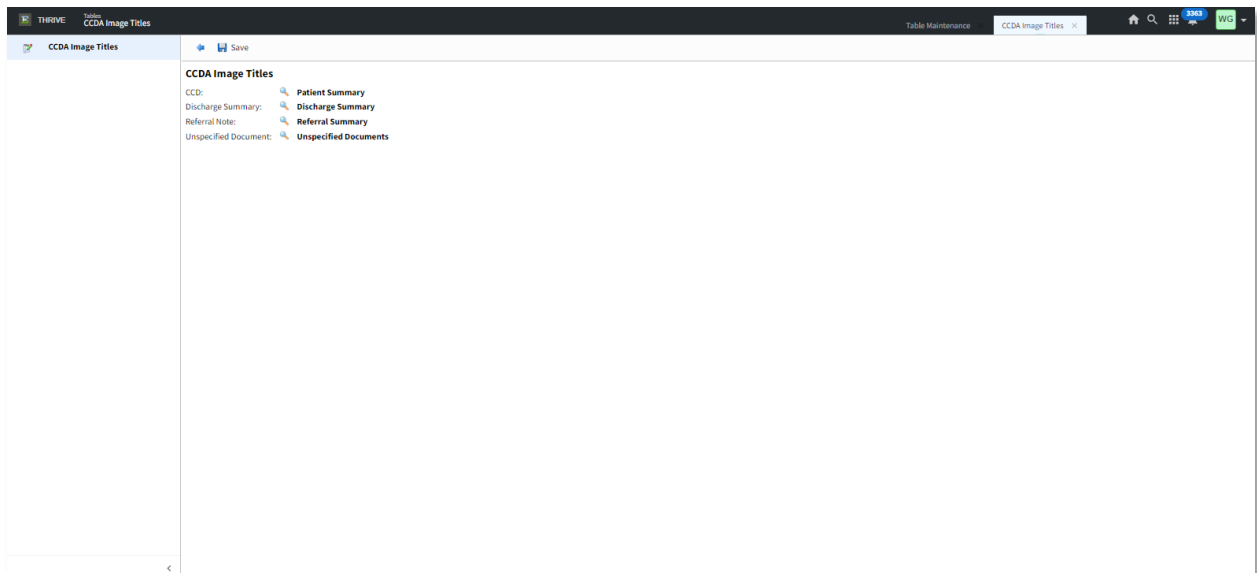
Frequency Crosswalk Setup

Path to set up Frequency Crosswalk: Web Client > Tables > Clinical > Clinical Reconciliation: Frequency Crosswalk
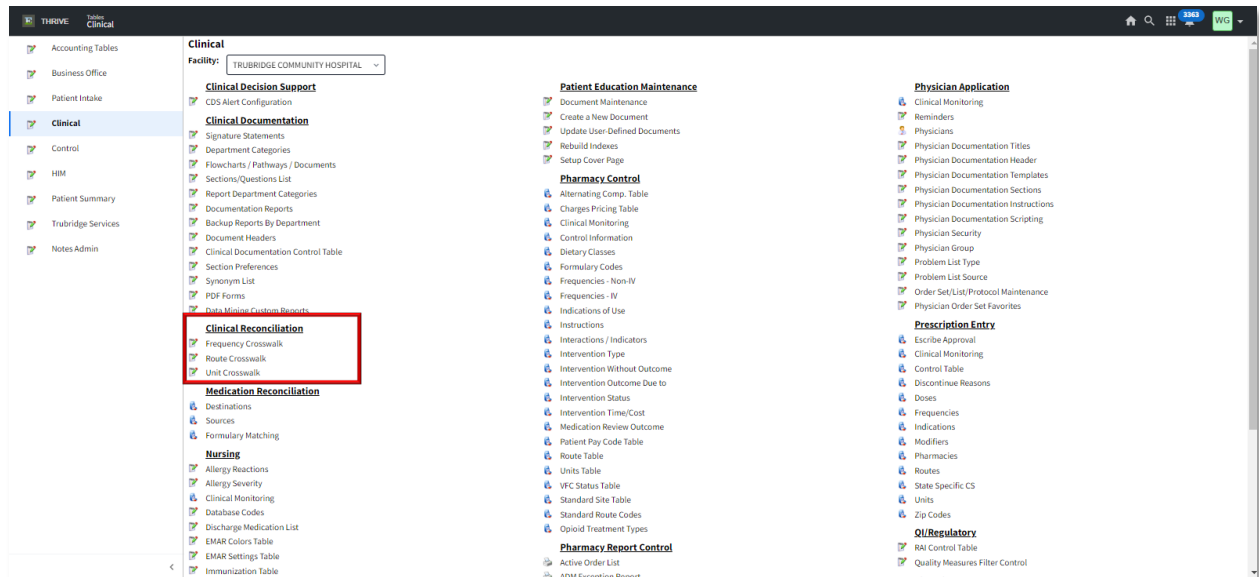
Frequencies are typically represented by a period of time and a unit of time (such as 8H for eight hours, 1D for once a day, 2WK for every other week, etc.) or by an event code that represents certain times of day (AC for before measures, HW for bedtime, etc.). Once the values have been entered, the appropriate prescription frequency must be associated to it.
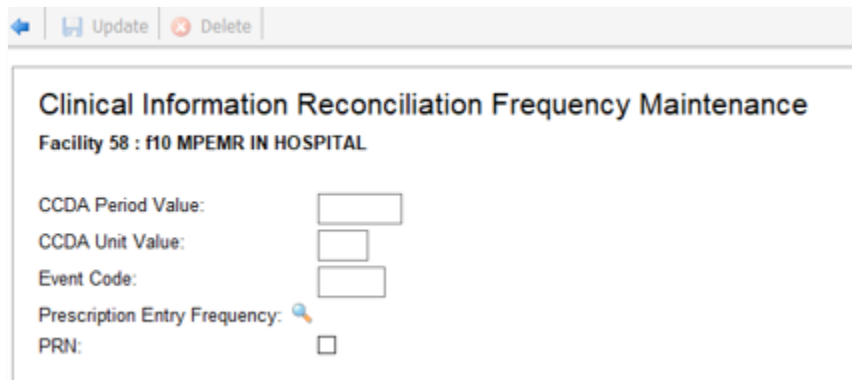
- It is possible for the period of time to be represented by a decimal instead of a whole number (0.5D or 12H can both be used for a medication to be taken twice a day).

- It is also possible to have a frequency with both period/units and an event code (1H and PC for taking a medication 1 hour after meals).

- PRN medications have a special section in the CCDA indicating the frequency is PRN instead of standard. To accommodate this, separate records must be created for the standard frequency and the PRN frequency. For example, a frequency of four times a day could be represented by 6H, and a frequency of four times a day as needed could be represented by 6H and the PRN box checked.

Select the CCDA Value lookup to associate a CCDA Value with the frequency.

Select **New**.

Complete the fields on the Clinical Information Reconciliation Frequency Maintenance screen:

- **CCDA Period Value:** This is a free text field that will allow the user to enter a valid period value.
  - For example: 0.5, 1 2, 4, 6, 8, 12
  - If the Frequency is "every 2 hours," the CCDA Period Value would be 2.

- **CCDA Unit Value:** This is a free text field that will allow the user to enter a unit value. This can be upper or lower case.
  - For example: D, H, MO, WK
  - If the frequency is "every 2 hours," the CCDA Unit Value would be H.

- **Event Code:** This is a free text field, but will likely not be used often.
  - For Example: HS, AC, PC
  - HW = Bedtime, AC, = Before Meals, PC = After meals

- **Prescription Entry Frequency:** The user can select the search icon to open the Prescription Entry Frequencies table and select a frequency. The selected frequency populates into the text box.

- **PRN:** Selecting this check box will make the frequency PRN.

Route Crosswalk Setup

Path to set up Route Crosswalk: Web Client > Tables > Clinical > Clinical Reconciliation: Route Crosswalk
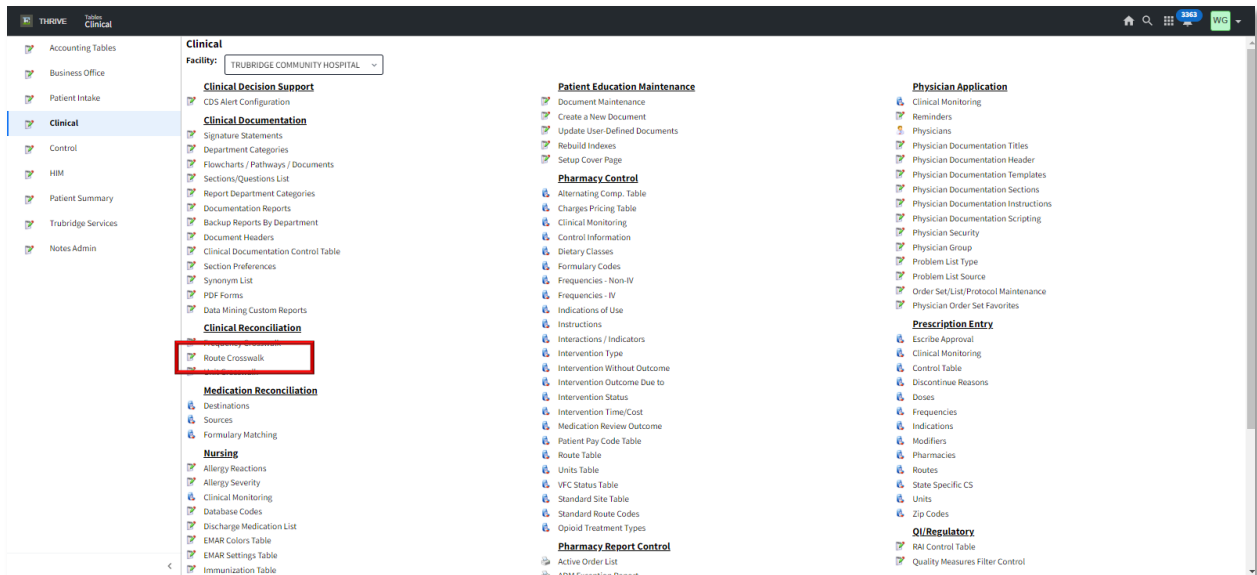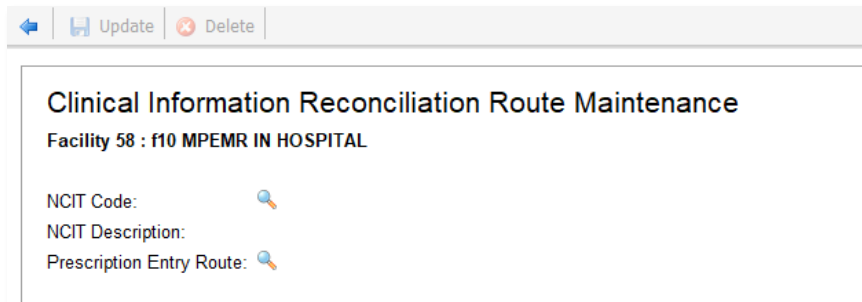
Select **New**.

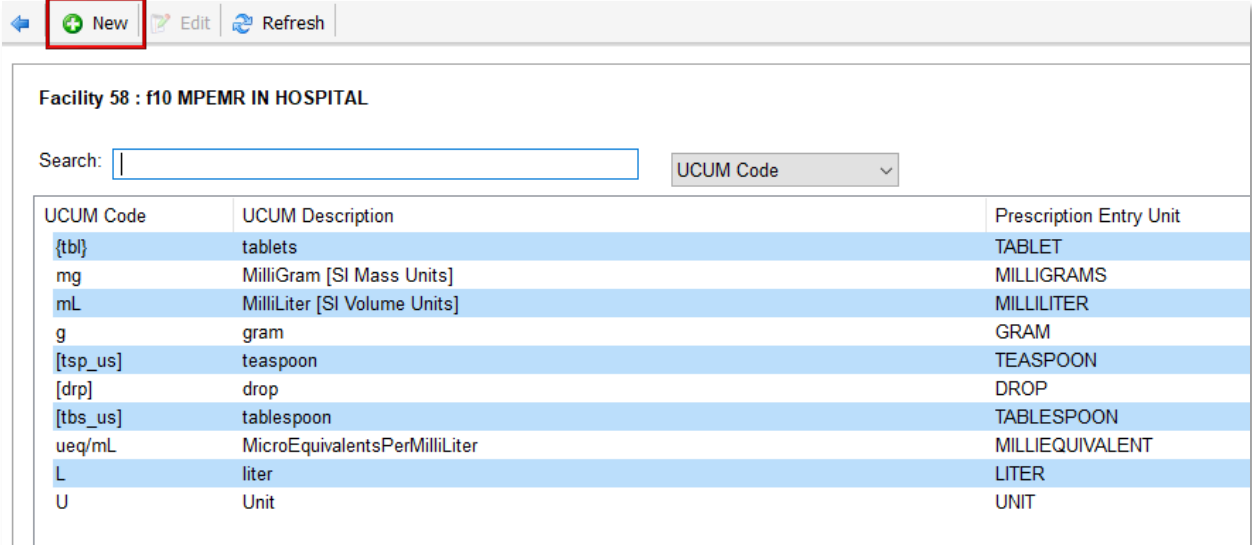Complete the fields on the Clinical Information Reconciliation Route Maintenance screen:
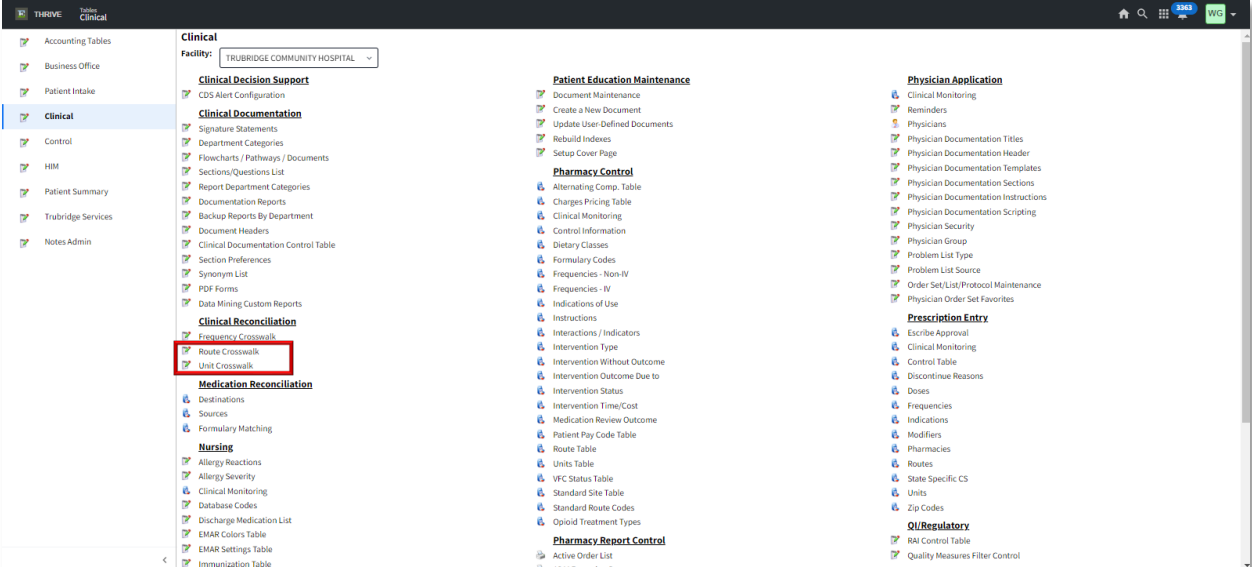
- **NCIT Code:** Select the search icon to select an NCIT code.

- **NCIT Description:** Once an NCIT code is selected, the description of the code will populate this field.

- **Prescription Entry Route:** Select the search icon to be taken to the Prescription Entry Routes table to select a route.

Select **Update**.

Unit Crosswalk Setup

Path to set up Unit Crosswalk: Web Client > Tables > Clinical > Clinical Reconciliation: Unit Crosswalk

Select **New**.

Complete the fields on the Clinical Information Reconciliation Unit Maintenance screen:
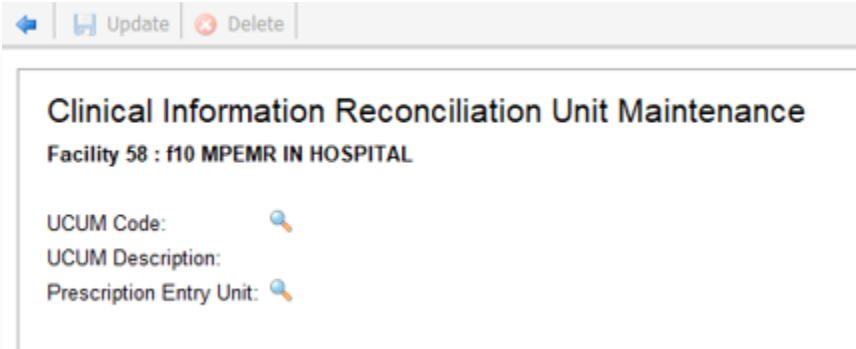
- **UCUM Code:** Select the search icon to select a UCUM code.

- **UCUM Description:** Once a UCUM code is selected, the description will populate in this field.

- **Prescription Entry Unit:** Select the search icon to be taken to the Prescription Entry Units table to select a unit.

Select **Update**.

Attestation Disclaimer:

Promoting Interoperability attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge Promoting Interoperability certified products, recommended processes, and supporting documentation are based on TruBridge's interpretation of the Promoting Interoperability regulations, technical specifications, and vendor specifications provided by CMS, ONC, and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.