PI 2023 – Provide Patients Access to Their Health Information

Quick Guide

Measure Details

Measure Description: For at least one unique patient seen by the MIPS eligible clinician: (1) The patient (or the patientauthorized representative) is provided timely access to view online, download, and transmit his or her health information; and (2) The MIPS eligible clinician ensures the patient's health information is available for the patient (or patientauthorized representative) to access using any application of their choice that is configured to meet the technical specifications of the Application Programming Interface (API) in the MIPS eligible clinician's certified electronic health record technology (CEHRT).

Numerator: The number of patients in the denominator (or patient authorized representative) who are provided timely access to health information to view online, download, and transmit to a third party and to access using an application of their choice that is configured to meet the technical specifications of the API in the MIPS eligible clinician's CEHRT.

Denominator: The number of unique patients seen by the MIPS eligible clinician during the performance period.

Scoring Information

- Required for PI Performance Category Score: Yes
- Measure Score: 25 Points (Previously 40 points)
- Eligible Bonus: No

Exclusions: N/A

Definitions

API: A set of programming protocols established for multiple purposes. APIs may be enabled by a health care provider or provider organization to provide the patient with access to their health information through a third-party application with more flexibility than is often found in many current "patient portals."

Provide Access: When a patient possesses all of the necessary information needed to view, download, or transmit their information. This could include providing patients with instructions on how to access their health information, the website address they must visit for online access, a unique and registered username or password, instructions on how to create a login, or any other instructions, tools, or materials that patients need in order to view, download, or transmit their information.

Timely Access: We define "timely" as within 4 business days of the information being available to the MIPS eligible clinician.

Unique Patient: If a patient is seen by a MIPS eligible clinician more than once during the performance period, then, for purposes of measurement, that patient is only counted once in the denominator for the measure. All the measures relying on the term "unique patient" relate to what is contained in the patient's medical record. Not all of this information will need to be updated or even be needed by the provider at every patient encounter. This is especially true for patients whose encounter frequency is such that they would see the same provider multiple times in the same performance period.

Set Up

Patient portal must be active to increment this measure.

Workflow

Activate Portal and API

When a new patient is created and both EMAIL ADDRESS and ZIP code are present the patient portal invitation is sent, and API is automatically activated. To activate the patient portal, follow the steps listed below:

1. Click Modify Patient hot button from dashboard

EMR				R							QEMR	
File Edit Go	File Edit Go View Tools Reports Window Help											
New Pat Mod Pat	Vitals History F	Rx-Meds	Orders 8	Results	Scan Docs	Cal	lendar	Schedule	Synops	is Inbox	CDA	Exit
Messages [0]		Ŧ	🦣 Patie	nt List								
			Search	mouse			1	× 🔒				
			Code	First Na	me	Δ	Last N	lame				
			1148	Mickey			Mouse					

2. Click Patient Portal icon next to Portal Status

A 1	N	Iodify Patient	X
Demo Hx Print Copy Patient	Save&Cls Close		
General Information			
Personal Information :			
* Code : 1154	SSN: 321-65-4	1987	Browse
Name : Minnie	Mouse		O Webcam
* (First Name)	(MI) *	(Last Name) (Suffix)	Browso Bhoto
* Date of birth : 08/31/1985	Time of birth :	00:00:00	Clear Photo
* Gender : Female 🗸 🗸	Marital : Si	ingle v	
Race : White 🗸	🔍 × Ethnicity : N	ot Hispanic Or 💗 🔍 🗙	
Hand dominance :	Language : E	nglish 🗸	Com Preference :
Address Details :		Contact Details :	
Address 1 : 1234 Main Street		Phone : (810)456-7899	Mobile : (810)656-1212
Address 2 :		Email : test@email.com	Fax :
City : Port Huron Stat	e: MI v	Portal Status : Invited	API Status : Activated 🕎
		Emergency Contact Deta	ils :
Zip : 48060 Count	y: US V	Contact :	Phone : ()
County : Saint Clair		Relationship :	✓ Mobile : ()



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a. Click OK to pop stating you must enter and email

gloEMR
If you want to Send Invitation to Patient, you must enter a valid Email address in Patient Demographics Screen.
OK Cancel

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- 4. Click Quick Activate hot button from Portal Account window
 - a. Click **Yes** to pop up asking 'Do you want to quick activate the patient?'
 - b. Click **Ok** to pop up informing 'You have activated the Patient successfully.

Portal Account						
Resend Invitation Quick Activate Close Portal Accounts Patient Representative						
Account Details	gloEMR ×					
Portal Username : Portal Account Status : Invited Date of Invitation : 6/27/2018 10:49:46 AM	Do you want to quick activate the patient?					
Date of Activation :	Yes No					
Date of Last Login :						

Select Print OR Send email to provide patient their patient portal login credentials

 Click Close hot button from Portal Account window

•	\$	Portal Account				
	Block/InActive	Reset Password	Close	Þ		
	Portal Accounts	Patient Representa	ative	· \		
	Account Det	ails				
		Portal Us	ername :	Constant of the second s		
		Portal Account	Status :	Activated		
		Date of In	vitation :	6/27/2018 10:49:46 AM		
		Date of Ac	tivation :	8/17/2020 10:56:12 AM (Quick Activated)		
		Date of Las	t Login :			
	Patient has no has be	email address but "a een provided per MU	access" : J rules	8/17/2020 To provide access "Print" Login Credentials)		
	Login Creder	ntials				
		Use	r Name :			
		Password (Case Se	nsitive) :			
				Print Send Email		

IF PATIENT DOES NOT HAVE AN EMAIL ADDERESS SELECT THE PRINT OPTION TO PROVIDE PATIENT WITH THEIR PATIENT PORTAL CREDENTIALS

Sending CDA

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There are two ways to increment this measure, one it can be done **automatically** by sending the CDA to the patient's portal upon finishing of the exam or users can **manually** send the CDA to patients' portal. In both workflows the CDA must be sent within 4 business days of exam date to increment this measure.

Option 1: Setup for Automatic Sending of CDA

- 1. Open EMR Admin
- 2. Click Settings from the left side bar
 - a. Click **CDA on Exam Finish** tab from Clinic Settings window



- 3. Place a **checkbox next the providers name** for which you would like CDA's to be automatically sent when their exams are finished **OR click Enable for all Provider** to select all providers in your practice
 - a. Click **Save & Close** hot button from CDA on Exam Finish window

	\$	CDA on Exam Finish							
	G Save&Cls	Close							
	DMS Settings Other Settings E&M Code Settings Exam Settings Interface Settings Surescript Settings Vitals Customization Settings								
Ċ	Clinic Set	ttings Clinical Chart Customization Settings Appointment Settings Patient Accounts Server Settings Lab Settings Fax Settings D Settings gloCommunity Settings MU Stage 1 MU Stage 2 ICD 10 Transition OB Specialty CDA on Exam Finish							
		Send CDA to Patient on Exam Note Finish							
	Enable for all Providers Prompt Provider for sending CDA								
	Enable	nable Provider Name							
		Addison T Graves							
		Airiel Lungley							
	•	Anesthesia Frank SCM							
	•	Anesthesia MEC							
		Art Thitus							

4. With this setting enabled a CDA will automatically send a CDA to patient portal and API upon completion of exam note



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1. Click Gen CDA hot button once all sections of your UNFINSHED exam are complete

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Click dropdown arrow from Send to Patient hot button

 Click Portal and API



3. Click **Close** hot button from Generate CDA window after receiving CDA File sent Successfully message appears

🛅 Generate CDA - MOUSE, Minnie (1154)								
Preview CDA Print Fax Send to Par	tient Export CDA Close							
Summary Type : Ambulatory summary	Summary Type : Ambulatory summary							
4/30/2019-R51 Headache			<u>Q</u>					
From Date 🗌 : 📄 Include Time 🛛	8/18/2020 09:28:36 AM 🗐 🗸 To 🛙	Date: 08/18/2020 09:28:36 AM						
Purpose of Use : Treatment		~						
• Select All (Normal)	Select All (Restricted)	Clear All Override CCDA section	ns					
Patient Demographics	Family History	Provider name						
✓ Problems	Social History	Referring Providers						
Medication allergies	Clinical Instructions	Reason for Referral						
Medications	Goals	✓ Provider office Contact Information						
✓ Vital Signs	Assessments	Date and Location of visit						
Implants	Health Concerns	✓ Immunizations						
Care Team Member(s)	Treatment Plan	Encounter Diagnoses						
Procedures	Privacy and Security Markings	Mental Status						
Laboratory Test(s)		Functional Status						
Laboratory value(s)/result(s)								
CDA file sent successfully.								

4. Finish your exam utilizing your standard workflow