Quick Guide

PI 2023 – Support Electronic Referral Loops by Receiving Health Information

Measure Details

Measure Description: For at least one electronic summary of care record received for patient encounters during the performance period for which a MIPS eligible clinician was the receiving party of a transition of care or referral, or for patient encounters during the performance period in which the MIPS eligible clinician has never before encountered the patient, the MIPS eligible clinician conducts clinical information reconciliation for medication, medication allergy, and current problem list.

Numerator: The number of electronic summary of care records in the denominator for which clinical information reconciliation is completed using CEHRT for the following three clinical information sets: (1) Medication – Review of the patient's medication, including the name, dosage, frequency, and route of each medication; (2) Medication allergy – Review of the patient's known medication allergies; and (3) Current Problem List – Review of the patient's current and active diagnoses.

Denominator: Number of electronic summary of care records received using CEHRT for patient encounters during the performance period for which a MIPS eligible clinician was the receiving party of a transition of care or referral, and for patient encounters during the performance period in which the MIPS eligible clinician has never before encountered the patient.

Scoring Information

- Required for PI Performance Category Score: **Yes**, unless submitting one of the alternatives:
 - HIE Bi-Directional Exchange measure (HIE_5) or
 - The Enabling Exchange Under TEFCA Measure (PI_HIE_6)
- Measure Score: 15 Points (Previously 20 points)
- Eligible Bonus: No

Exclusions: Any MIPS eligible clinician who receives transitions of care or referrals or has patient encounters in which the MIPS eligible clinician has never before encountered the patient fewer than 100 times during the performance period.

Definitions

Transition of Care: The movement of a patient from one setting of care (hospital, ambulatory primary care practice, ambulatory specialty care practice, long-term care, home health, rehabilitation facility) to another. At a minimum, this includes all transitions of care and referrals that are ordered by the MIPS eligible clinician.

Referral: Cases where one provider refers a patient to another, but the referring provider maintains his or her care of the patient as well.

Current problem lists: At a minimum, a list of current and active diagnoses.

Active/current medication list: A list of medications that a given patient is currently taking.

Active/current medication allergy list: A list of medications to which a given patient has known allergies.

Allergy: An exaggerated immune response or reaction to substances that are generally not harmful.

Set Up

Direct Messaging must be set up and enabled.

Workflow

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Import CDA via Direct Message Attachment

Complete the following steps with **QEMR**

1. Open Direct Message (DM) Inbox within QEMR

a. Via the Inbox hot button on the dashboard OR



b. Via Tools > Provider DIRECT Message Inbox

2. Left click on a message within the Inbox with a CDA attached

9				DIRECT Inbox					
New Message Print Delete S									
Message « 🔄 Search Index P · *									
Favorites Folders *		From	Subject	Received User					
inbox 0 ☞ Unread Mail information Sent Items		DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com	test1 test new 20_01 test1 test123	11/24/22 4:07 AM 01/20/22 3:48 AM 01/20/22 2:01 AM 01/20/22 2:00 AM	Sent: 11/24/22 4:07 AM To: DoogieHowser@glostream.cert.direct-ci.com				
Message Folders A Messages - Doogie Howser Deleted Items Dubox 0 Outbox Sent Items		DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com	Demo 9051 Demo 18 Test New 18 Test 123 Test CDA dsv	01/18/22 6:38 AM 01/18/22 6:30 AM 01/18/22 6:32 AM 01/18/22 4:36 AM 09/30/21 5:54 AM 09/30/21 5:54 AM	test				

Right-click on the CDA attachment within the preview section on the right side

 a. Select Import CCDA to Patient Chart

9				DIRECT Inbox						
S E E E New Message Print Delete Send/Receive Close Doogie Howser@glostream.cert.direct-ci.com										
Message «				Search Inbox 🔎 🔹	test1					
Favorites Folders *	De	From	Subject	Received User						
Inbox 0 Unread Mail Sent Items		DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com	test1 test new 20_01 test1 test123	11/24/22 4:07 AM 01/20/22 3:48 AM 01/20/22 2:01 AM 01/20/22 2:00-AAA	Sent: 11/24/22 4:07 AM To: DoogieHowser@glostream.cert.direct-ci.com					
Message Folders * Messages - Doogie Howser Deleted Items Inbox 0 Outbox Sent Items		DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com DoogieHowser@glostream.cert.direct-ci.com	Demo 9051 Demo 18 Test New 18 Test123 Test CDA dsv	01/18/22 6:2 2 Impor 01/18/22 6:2 2 Impor 01/18/22 6:2 2 Immor 01/18/22 4:3 AM 09/30/21 5:54 AM	oad t CCDA to Patient Chart selected file to DMS					



New Patient

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1. Click **Import** from CCD-CCR-CDA Files window



2. Click Continue Import from Validate CDA window



3. Click Register Patient hot button from Show CCD-CCR window

1		Show CCD-CCR	_ □	X				
Register Patient	Discard CCD-CCR	Close						
Source : TRIARQ Practice Services								
TRIARQ Practice Services : Care Record Summary (Confidentiality:Normal)								

4. Click OK to Saved pop-up





5. Click Save & Close hot button from Modify Patient module

20						x					
Den	no Hx	() Print	Gave&Cls	(2) Close							
Ger	General Information										
Per	rsonal I	informat	tion :								
* C	Code:	2121			SSN :			Browse			
Na	ame :	alma			Carr			 Webcam 			
Pre *	eferred I Date of	* (Name : [birth : [(First Name) 04/15/2000		(MI) * Time of birth : (hhimmiss) Marital :	(Last Name) 00:00:00	(Suffix)	Browse Photo Clear Photo			

6. The Modify Patient window closes and when you view that patient on your QEMR Dashboard a CDA Reconciliation will flash as Pending

Patient Demographics		Ŧ
Image: Constraint of the second se	Alexandria, OH 43001 Gender : Female Phone : Email : EM.Contact : EM.Phone : PCP : Language : English Occupation :	

Existing Patient

- 1. Click Import from CCD-CCR-CDA Files window
 - a. Uncheck Send Task to deselect designated recipient from receiving task

si icii ci		Import CCD-CCR-CDA Files	x
(C) Import	Preview CDA	e	
Existi Selec	ng Patient: CARR, ALM t Reconciliation Type:	A DOB: 04/15/2000 Gender: Female Import and Reconcile Send Task	
Selec	t Reconciliation Type:	Import and Reconcile V Send Task	



2. Click **Continue Import** from Validate CDA window



3. Click OK to List Generated pop-up



Reconciliation

- 1. Review section 4 unchecking any medications no longer active or duplicated
 - a. Click Finalize hot button

Finalize) ie																
BAII	EY, I	Beatrice G.	Born: 10/29/	1984 (35 Years 9	Months) G	ender: Fer	nale Code	2: 1339	2									
Provid	Provider : William Bart Date : 08/11/2020 11:44:34 AM																	
1. Sel	1. Select Type of Information to Reconcile [Meds, Med Allergies, or Problems]																	
Sele	Select List Type : Medication V Patient has Problem, Medication, Med Alergy Lists.																	
2. Ve	2. Verify which lists should be reconciled with the Patient's Chart.																	
Select	List	Name				5	iource					Imp	oort Dat	e List Stat	us			^
~	gloC	linic_2020Jun11-2				g	loClinic					6/1	1/2020	Ready				
~	gloC					0	loClinic					8/1	1/2020	Ready				
	alac						la cliata					7/10		The labor				~
		selected lists. Each	separate list i	s designated by its									🗌 Hi	de Patient's	Discontinued a	nd Completed	Medica	itions
Dup L	st Na	me	Source	Last Updated	Drug		Start D	ate End Date	e Frequei	ncy Amo	unt Refil	s Drug	j Form	Status	NDC Code	RxNorm Co	ode Ge	ener <mark> ^</mark>
1 C	irrent	List	Current	3/4/2020	4-Way Fast Act	ng Nasal Spr	ay 2/7/201	7						active	00067208601	1307224	Phe	enyl
1 O	urrent	List	Current	3/4/2020	4-Way Fast Act	ng Nasal Spr	ay 2/7/201	7						active	00067208601	1307224	Phe	enyl
1 O	urrent	List	Current	3/4/2020	A+D Topical Oi	ntment	2/7/201	7						active	00085009601	705895	Lan	nolir
	mont	Lisk	Current	2/4/2020	A . D Tanical Oi	ntenant	2/7/201	7					R	a chive	00005000601	705005	Las	nalir 🗡
	_																_	1
4. Re	/iew t	he consolidated dis	olay. Unselect	any unneeded item	is. Then press	Finalize'. Th	e system ha	is already ren	10ved obvi	ous duplic	ates and wa	rns you ab	out sim	lar items to	review.			✓
Select	Dup	Source	Last Updated	Drug		Start Date	End Date	Frequency	Amount	Refills	Drug Form	Status	ND	C Code	RxNorm Code	Generic Name	User	Rx_
~		Current	3/4/2020	4-Way Fast Acting N	asal Spray	2/7/2017						active	000	67208601	1307224	Phenylephrine	cking	
~		Current	3/4/2020	A+D Topical Ointme	ent	2/7/2017						active	000	85009601	705895	Lanolin, Petrola	cking	
-		Current	3/4/2020	Icy Hot No Mess Max	ximum-Strength	2/7/2017						active	411	67009100	866084	Menthol	cking	
~		Current	3/4/2020	Prednisone 20mg Ta	ablet	6/17/2016	7/16/2016		30			active	003	78064201	312615	Prednisone	cking	
~		gloClinic	5/10/2018	A+D Topical Ointme	ent	2/7/2017						active	115	23720401	705895	Lanolin, Petrola	. cking	
~		gloClinic	5/10/2018	Icy Hot XL Extra Stre	ength Medicate	2/7/2017						active	411	67008407		Menthol	cking	
✓		gloClinic	5/10/2018	Lisinopril 2.5mg Tab	let	6/17/2016						active	680	01033200		Lisinopril	cking	
✓		gloClinic	5/10/2018	Prednisone 20mg Ta	iblet	6/17/2016	7/16/2016		30			active	422	91077101		Prednisone	cking	



2. Click Accept hot button from Patients Active Medications window

	Patients Active Medications - BAILEY, Beatrice G.(1339)											
Close												
Patients Ac	tive Medications											
Source	Last Updated	Drug	Start Date	End Date	Frequency	Amount	Refills	Drug Form	Status	NDC Code	RxNorm Code	G
Current	8/11/2020	4-Way Fast Acting	2/7/2017						active	00067208601	1307224	Pł
Current	8/11/2020	A+D Topical Ointr	2/7/2017						active	00085009601	705895	Lä
Current	8/11/2020	Icy Hot No Mess M	2/7/2017						active	41167009100	866084	M
Current	8/11/2020	Prednisone 20mg	6/17/2016	7/16/2016		30			active	00378064201	312615	Pr
gloClinic	8/11/2020	A+D Topical Ointr	2/7/2017 🗸						active	11523720401	705895	La
gloClinic	8/11/2020	Icy Hot XL Extra S	2/7/2017 🗸						active	41167008407		M
gloClinic	8/11/2020	Lisinopril 2.5mg Ta	6/17/2016 🗸						active	68001033200		Li
gloClinic	8/11/2020	Prednisone 20mg	6/17/2016 🗸	7/16/2016		30			active	42291077101		Pr

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3. Click **OK** if message appears stating there are medications missing NDC codes, the listed medications will NOT be added to the medication history



- 4. Repeat Steps 1 and above Reconciliation Workflow for Problem List and Med Allergy List
- 5. Click **Close** hot button once you see Patient has No Ready List.





6. Click Close button from Import CCD-CCR-CDA Files window

