

## PI 2023 – Support Electronic Referral Loops by Sending Health Information

### Measure Details

**Measure Description:** For at least one transition of care or referral, the MIPS eligible clinician that transitions or refers their patient to another setting of care or health care provider — (1) creates a summary of care record using certified electronic health record technology (CEHRT); and (2) electronically exchanges the summary of care record.

**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.

**Denominator:** Number of transitions of care and referrals during the performance period for which the MIPS eligible clinician was the transferring or referring clinician.

### 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 transfers a patient to another setting or refers a patient fewer than 100 times during the performance period.

**Note:** A MIPS eligible clinician must verify that the fields for current problem list, current medication list, and current medication allergy list are not blank and include the most recent information known by the MIPS eligible clinician as of the time of generating the summary of care document or include a notation of no current problem, medication and/or medication allergies.

### 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.

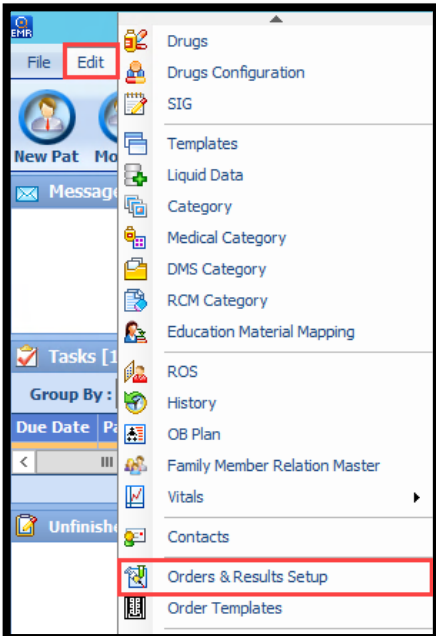
**Active/current medication allergy list:** A list of medications to which a given patient has known allergies.

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

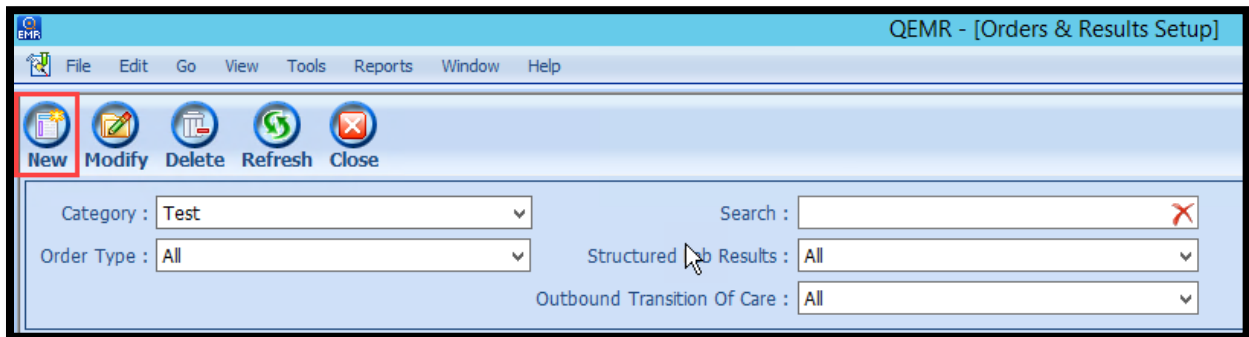
## Set Up

### Building Outbound Transition of Care Order & Results

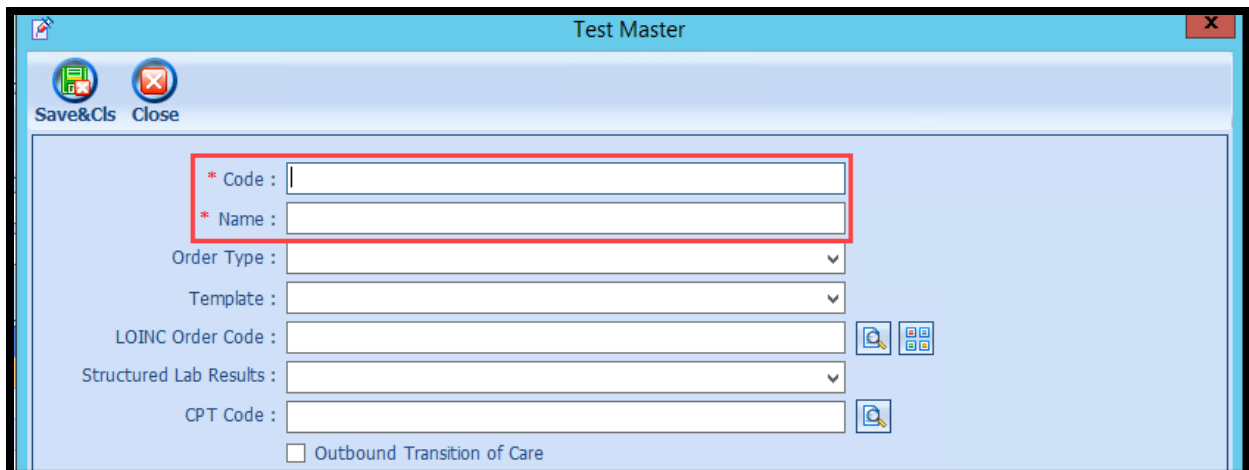
1. Log into QEMR > Navigate to **Edit > Order & Results Setup**



2. Click **New** hot button from Orders and Results Setup window



3. Complete the **Code and Name** fields from Test Master window



4. Select **Referrals** from the Order Type dropdown list

The screenshot shows the 'Test Master' window. The 'Order Type' dropdown menu is open, and 'Referral' is selected. The 'Outbound Transition of Care' checkbox is unchecked.

5. Enable '**Outbound Transition of Care**' checkbox

The screenshot shows the 'Test Master' window. The 'Outbound Transition of Care' checkbox is now checked. The 'Code' field contains 'tstcd' and the 'Name' field contains 'Referral Name'.

6. OPTIONAL: Select a template from the **Template** dropdown list if you would like to associate a template to this order for faxing or attaching to Direct Message

- a. The template available are the templates saved in Edit > Template > Orders category

The screenshot shows the 'Test Master' window. The 'Template' dropdown menu is open, displaying a list of templates including: '\*Order Test', '.Millennium Diagnostic Center Mammogram', '.Millennium Diagnostic Center Orders', 'Allergy Information Sheet', 'Ankle Xray Ottawa Rules', and 'BART - MRI - Knee'.

- Click **Save & Close** hot button from Test Master window

Test Master

Save&Cls Close

\* Code : tstcd

\* Name : Referral Name

Order Type : Referral

Template : \*Order Test

LOINC Order Code :

Structured Lab Results :

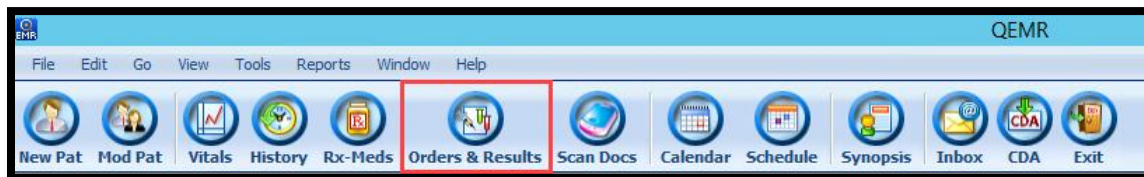
CPT Code :

☒ Outbound Transition of Care

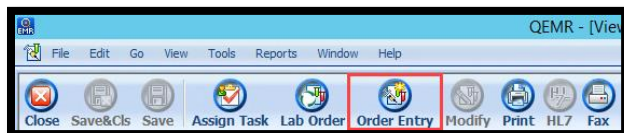
## Workflow

### Creating Outbound Transition of Care Order

- Search for and select the appropriate patient from your QEMR Dashboard
- Click **Order & Results** hot button



- Click **Order Entry** hot button from View Orders and Results window



- Click **Referrals** category from left side bar

Save&Cls Close

MOUSE, Mickey M. Born:

Lab Tests

☐ Include Test Code

\*Lab Order Test

ACE

Acetaminophen

Radiology/Imaging

Referrals

Other

- Double-click the appropriate order you would like to create

Save&Cls Close

**MOUSE, Mickey M.** Born:

**Referrals**

☐ Include Test Code

Refer to PCP for Follow UP  
Referral to GI  
Referral to PT

- Click **Template ellipsis** button

Order Entry - MOUSE, Mickey M.( 1148 )

Save&Cls Close

**MOUSE, Mickey M.** Born: 1/1/1988 (32 Years 7 Months ) Gender: Male Code: 1148

**Referrals** Ordering Provider : Wayne w Best

☐ Include Test Code

Order Details :

Order Number : ORD-328

Send To : ☒ Lab ☐ Physician Collection Date : 08/18/2

Preferred/Performing Lab : Assign Task To :

Referred By : Sampled By :

Order Status : New

Test	Diagnosis	...	Treatments	...	Templates	Instruction
Refer to PCP for Foll						

- Complete the template
- Click **Save & Close** OR **Finish** hot button depending on your office direction

Finish Save Save&Cls Print

- Click **Save & Close** hot button from Order Entry window

Order Entry - MOUSE, Mickey M.( 1148 )

**Save&Cls** **Close**

**MOUSE, Mickey M.** Born: 1/1/1988 (32 Years 7 Months ) Gender: Male Code: 1148

Referrals

Ordering Provider : Wayne w Best

☐ Include Test Code

Order Details :

Order Number : ORD-328

- Click **Gen CDA** hot button

QEMR - [View Orders and Results - JA]

File Edit Go View Tools Reports Window Help

Close Save&Cls Save Assign Task Lab Order Order Entry Modify Print HL7 Fax Reload Messages Pat Ltrs Ref Ltrs PoT Print Requisition **Gen CDA**

- Provider Direct Msg** hot button

Generate CDA - JAMES, Alex J.( 1029 )

**Preview CDA** **Print** **Fax** **Provider DIRECT Msg** **Export CDA** **Close**

Summary Type : Summary of care record ☐ Indicate 'Patient Copy'

- Click **CDA Files** hot button from New Message window

New Message

**Address Book** **Attach File** **Scan Document** **CCD Files** **CDA Files** **Close**

**MOUSE, Mickey M.** Born: 1/1/1988 (32 Years 7 Months ) Gender: Male Code: 1148

From : DirectMessage Provider - DirectMessageProvider@glostream.cert.direct-ci.com

To...

Send

Subject :

Disclaimer : Protected Health Information (PHI) under HIPAA must not be included in a message's subject line.

Attachment... 081820201117479940.docx



### 13. Click **To** button from New Message Window

**New Message**

Address Book Attach File Scan Document CCD Files CDA Files Close

**MOUSE, Mickey M.** Born: 1/1/1988 (32 Years 7 Months) Gender: Male Code: 1148

From: DirectMessage Provider - DirectMessageProvider@glostream.cert.direct-ci.com

To...

Subject:

Disclaimer: Protected Health Information (PHI) under HIPAA must not be included in a message's subject line.

Attachment... 081820201117479940.docx CDA\_1148\_8182020154912778.xml

### 14. Click **Practice Contact** or **Surescripts Catalogue**

- Search for the provider by entering providers last name in the search field
- Check the **box** to the left of the appropriate providers name
- Click **Save & Close** from Address Book window

**Address Book**

Save&Cls Close

Patient's Providers Practice Contacts Surescripts Catalogue

Search: A

Select	Prefix	First Name	Middle Name	Last Name	Suffix
<input checked="" type="checkbox"/>	DR	Alexis		Balomenos	MD
<input type="checkbox"/>		Nathen		Styris	
<input type="checkbox"/>		Charles	R	McCall	
<input type="checkbox"/>		Janice	D	Joyce	
<input type="checkbox"/>		Partha		Nandi	MD
<input type="checkbox"/>		Robert		Marra	

### 15. Enter text into **Subject** and **Body** of Message

**New Message**

Address Book Attach File Scan Document CCD Files CDA Files Close

**MOUSE, Mickey M.** Born: 1/1/1988 (32 Years 7 Months) Gender: Male Code: 1148

From: DirectMessage Provider - DirectMessageProvider@glostream.cert.direct-ci.com

To: Alexis Balomenos <ABalomenos@TCP.directglo.com>

Subject: Subject Text

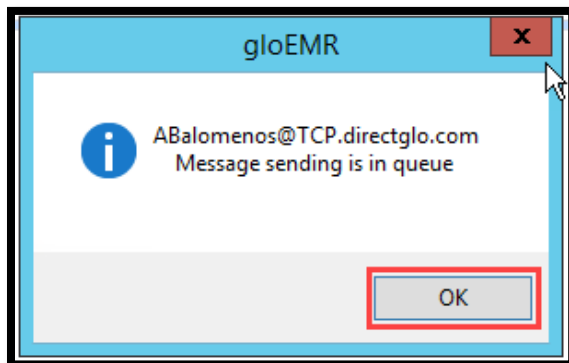
Disclaimer: Protected Health Information (PHI) under HIPAA must not be included in a message's subject line.

Attachment... 081820201117479940.docx CDA\_1148\_8182020154912778.xml

Body of message text.

16. Click **Send** button from New Message Window

17. Click **Ok** to message



## Incrementing Details

- Per CMS the MIPS eligible clinician must verify that the fields for current problem list, current medication list, and current medication allergy list are not blank and include the most recent information known. If applicable a notation of no current problem, medication and/or medication allergies must be documented.
- The patient will only meet the numerator for this measure once the Sent Message within the providers Direct Messages module has a status of 010.