

## Clinical summaries provided to patients for all office visits (12)

### Final Rule

Clinical summaries provided to patients for more than 50% of all office visits within 3 business days.

**Core:** ✓ **Menu:**

**Numerator:** The number of patients in the denominator who are provided a clinical summary of their visit within three business days.

**Denominator:** The number of unique patients seen by an eligible professional (EP) for an office visit during the EHR reporting period.

**Exclusion:** Any eligible professionals (EP) who have no office visits during the EHR reporting period.

### Overview and Setup

**Requires:** Core EHR – Base Functionality

**Availability:** Prior to v11.2: ✓ With v11.2: ✓ (enhanced)

**Objective is shared across Eligible Professionals:**

Yes: No: ✓

**Objective must be recorded during the reporting period:**

Yes: ✓ No:

#### **Related Preferences:**

- TW Admin / Preferences
  - *Enable CS On Schedule Daily* – Set to “Yes” to add the Clinical Summary column to the Daily schedule.
  - *Enable CS On Schedule Provider* - Set to “Yes” to add the Clinical Summary column to the Provider schedules.
- Schedule / Daily / Personalize
  - *Show Clinical Summary Column* – Check this to add the Clinical Summary column to the Daily schedule.
- Schedule / Provider Schedules / Personalize
  - *Show Clinical Summary Column* – Check this to add the Clinical Summary column to the Provider schedules.
- TW Admin / Preferences / General
  - *Allow CS When Note Unfinal* – Set to “Yes” at the Enterprise/Org and user level to allow for unfinalized notes, linked to the encounter to be provided as a Clinical Summary
  - *Encounter Summary: Always Provide Clinical Summary* – Set to ‘No’ at the Enterprise/Org and user level to allow for user to determine if the Clinical Summary is going to be provided from the Encounter Summary.
  - *Pt Communication Clinical Summaries Editable* – Recommendation is to set this field to “Yes” as we do not expect this value is being captured and sent from the Practice Management System. If it is, set to “No”.

#### **Related Setup:**

- In the “Document Type” dictionary, ensure the “Is Clinical Summary” check box is flagged appropriately for any Version 10 or Version 11 Notes that meet the meaningful objective. SSMT may also be used to populate this field through the “Document Type” content category and the column “IsClinicalSummaryFlag”.
- If you have a Version 11 Note Output defined today, a script can be run to automatically set the Note Output as a default.
- If you using a Version 11 Note, a single clinical summary may be defined by creating a Note Output for one Note Input and via a script which copies/adds that Note Output to multiple Note Inputs.
- Verify auto-print defaults are established for those users that will be printing the clinical summary.
- Ensure that the patient population is defined to include an option for the Clinical Summary option (e.g. Print, Portal...) in the Patient Preferred Communication.
- Verify Chart-View and Chart-Print security is enabled for any user that will be producing a clinical summary.
- Consider who, where and when the clinical summary will be produced. Is this an action that the providers are expected to complete at the end of each encounter, or will the clinical or non-clinical staff be responsible for providing the Clinical Summary to the patient?

## Workflows

### Provide clinical summary

#### Recommended Workflow:

##### Provider Role:

- A V10 or v11 Note is linked to an arrived appointment encounter.
- The clinical documentation has been added, and the Note is Finalized (if v11 Note, the specific Output defined as Clinical Summary must be finalized), by a provider with authority.
- Based on Auto-Print Defaults the Clinical Summary is printed and provided to the patient, by the provider or Clinical/Non-Clinical Staff.
- The Clinical Summary icon on the provider schedule is updated.

##### Clinical Staff Role:

- If they have finalization authority, the clinical staff may complete the recommended workflow.
- Otherwise, if they have Chart-View or Chart-Print security, they can provide Clinical Summary from the Provider schedule

##### Non-Clinical Staff Role:

- If they Chart-View or Chart-Print security, they can provide Clinical Summary from the Provider schedule

Alternate Supported Workflow: If the Note is not finalized, no Note linked to the encounter, or any patient communication preference other than 'Printed' is used, the Clinical Summary will be provided by selecting the Clinical Summary icon on the provider schedule. The Clinical Summary icon will then correctly reflect the method in which the Clinical Summary was provided.

Alternate Supported Workflow: Clinical Summary can also be generated via the Encounter Summary, when the *Provide Clinical Summary* property is selected and the *Print Patient Education* button is selected, or the *Save and Continue* option is selected from within the Encounter Summary. The Clinical Summary icon, on the provider schedule, will then correctly reflect the method in which the Clinical Summary was provided.

## Reporting

### Numerator:

- For each unique patient, the system will count once any patient who:
  - Received a clinical summary (determined by indicator in Document Type dictionary)
  - Within 3 business days of the visit

### Denominator:

- For each unique patient the system will count once each patient.

### Exclusion:

- For each unique patient, the system will count once each patient.
  - If the number is zero, the provider will be excluded from this objective.

### Indicators:



When the numerator divided by denominator is 50% or greater.



When the numerator divided by denominator is between 40% and 49%.



When the numerator divided by denominator is below 40%.

## Additional Information

### References:

- Certified Workflows:
  - G1 Note: Acute Visit
  - G2 Note: New or Chronic Visit
  - G3 Note: Procedure Visit
  - G4 Note: Health Maintenance
  - G5 Note: Results Review
- Determining the eligible professional (EP) a Patient Has Been Seen By
- Application Design and Behavior Resource (ADBR) for Allscripts Enterprise EHR v11.2.

### **Additional Information (cont.)**

#### **Considerations:**

- Business Days are considered by the Stimulus Reporting Portal
- Federal and state holidays are considered by the Stimulus Reporting Portal
- A clinical summary may be defined as:
  - A CCD
  - A v11 Note flagged in the document type dictionary as such.
  - A v10 Note flagged in the document type dictionary as such
- Requests four days prior to the end of the reporting period are excluded.
- Both scripts utilize Document Type name to identify documents.
- If no encounter documents are flagged as a clinical summary (or no documents are linked) in the document type dictionary, a CCD will be generated.
- It takes an action (such as finalizing a note, choosing from the schedule, etc.) on the part of the provider or staff to indicate the encounter is complete (enough at least) for production of the clinical summary.
- The scripts mentioned in the Related Setup section will be available to be run directly by you. Documentation will be included within the script itself.