

COMMUNITY

e-Referrals Review and What's New

April 24, 2015

Laura Gold and Crystal Vervaecke



TODAY'S PRESENTERS.....



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Galen Healthcare Solutions***



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Galen Healthcare Solutions***

Solving for Today. Preparing for Tomorrow.

Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!

Cisco WebEx Event Center

File Edit View Communicate Participant Event Help

Event Info Public_Webc... x

03

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MUCH MORE
THAN I.T.

OPPORTUNITY

Welcome to Today's Webcast

The webcast will begin shortly...

Participants

Q&A

All (0)

Ask: All Panelists

Send

Connected

Agenda

- ☐ What is an eReferral
- ☐ Review Core Measure 15
- ☐ Prerequisites
- ☐ Current Configuration
- ☐ Current Workflow

- What is an eReferral?

A method to send a referral to another service provider electronically

- Why send referrals electronically?

Improve Practice Efficiency and Knowledge Exchange

Meaningful Use Stage 2

Core 15

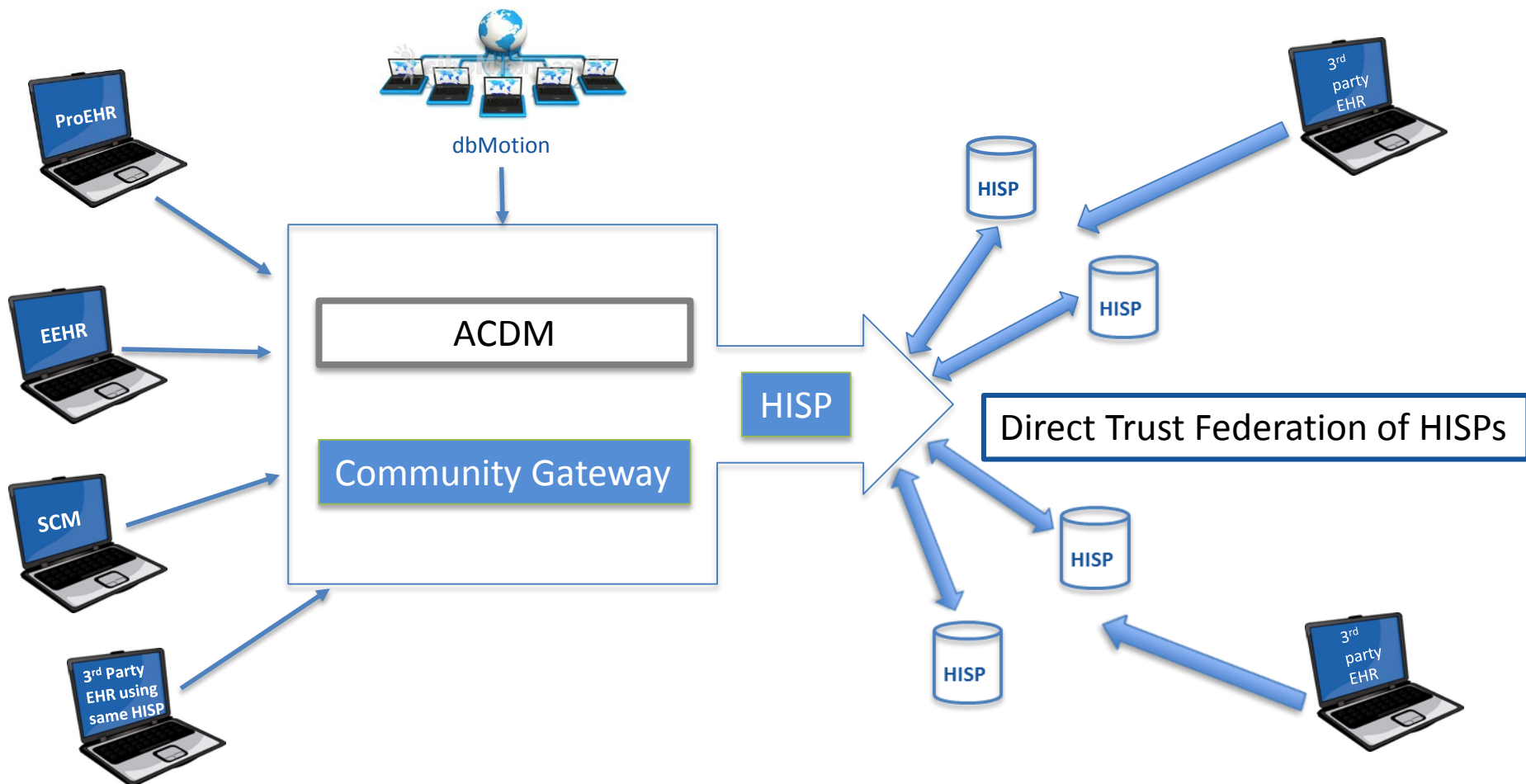
Description- *The EP who transitions their patient to another setting of care or provider of care or refers their patient to another provider of care should provide summary of care record for each transition of care or referral.*

Measure 1: > 50% of patients that are transitioned or referred to another setting of care or another provider of care are provided a Summary of Care record.

Measure 2: >10% of such transitions of care and/or referrals are electronically transmitted

Measure 3: Conduct 1 or more successful electronic exchanges of a summary of care document, as part of which is counted in "measure 2" with a recipient who has EHR technology that is different than the initiating technology

The BIG picture



New Terminology

- ❖ **HISP Health Information Service Provider-** acts as an information exchange bank that translates information from Allscripts to the Referred To Provider's Electronic Health Record (EHR)
- ❖ **ACDM Allscripts Community Direct Messaging** is the Allscripts secure 'pipeline' that functions as a community gateway it is cloud based
- ❖ **Direct Messaging ID** is a highly secure email address specifically designed for the transmission of health information, offering patients and providers the opportunity to safely transmit medical information to providers outside of their entity.

Example of a Direct Address: provider.name@<client-name>.allscriptsdirect.net

Prerequisites

- ❖ TouchWorks EHR 11.4.1
- ❖ Referral Orders
- ❖ Referral Provider Dictionary
- ❖ Install Meaningful Use 2014 Package

Configuration Checklist

- ❖ Referral Order Configuration – Orderable Item Dictionary
- ❖ Communication Method Dictionary Configuration
- ❖ Clinical Document Source Dictionary Configuration
- ❖ Auto Submit Configuration
- ❖ Preferences Configuration
- ❖ Referring Provider Set-Up
- ❖ TWUser Admin Updates
- ❖ CCDA Templates Review & Configuration
- ❖ Reviewing Referral Documents
- ❖ Tasks Configuration

Referral Order Configuration – Orderable Item Dictionary OLD

TW Admin ▾ Hide VTB

Dictionaries ▾ Dictionaries

Sig Capture
Clinical Note Admin
CareGuide Admin
Charge Admin
Chart Admin
Comm Admin
Concept Mapping
Conversion Admin
Dictate Admin
Dictionaries
Document Admin
eCalcs Config
Group Admin
Note Admin
Org Setup
PHB Comp Admin
PHB Sec Admin
Patient Query
Preferences
Results Admin
Queue Admin
Provider Admin
PT List Admin
Report Admin
Security Admin
Task Admin
TWUser Admin
Utilities
Work Def Admin
V10 Note Admin

Dictionary: Orderable Item

- Other Diagnostic Testing
- Laboratory
- Clinical Findings
- Dx Imaging
- Follow Up
- Referrals**
- Medication, Immunization and Pharmac
- **Allscripts Defined Vaccines**
- **Locally Defined Medications**

Code	Name	Mnemonic
67	Referrals	
C501539	Cardiology Referral	C501539
C501544	Dermatology Referral	C501544
C501550	Family Medicine Referral	C501550
C501552	General Surgery Referral	C501552

Add

☒ Orderable ☐ Complex Orderable Via: User Only ▾ OID Mode: Active ▾ Order Type: Referrals ▾

Modifier Picklist#1: ▾ Default Modifier#1: ▾ ☐ Required to Save #1 ?

Modifier Picklist#2: ▾ Default Modifier#2: ▾ ☐ Required to Save #2 ?

Modifier Picklist#3: ▾ Default Modifier#3: ▾ ☐ Required to Save #3 ?

To Be Done default ☐ None ☐ Now ☒ Today ☐ Fuzzy Date Future Date 0 ▾

Behavior

Not Applicable if Gender Equals: ▾ Priority Default: ▾

Custom Reasons for Keeping in Needs Info Status: [0] ▾

Custom Reasons for Keeping in Hold For Status: [0] ▾

Ordering Authority: 1 ▾ Duplicate Checking Interval: 0 ▾

☐ Automatically Complete Upon Order Becoming Active ☐ Always Display Order Detail on Selection ?

☐ Do not include for MU Reporting

Sub Order Type for Tracking Board: ▾

Communication Method Dictionary Configuration

Dictionary: Communication Method

Code

- CallOrder
- CallRx
- DispOrder
- DispRx
- DispSamp
- eReferrals
- 1
- 2
- 3
- Perform
- PrintLbl
- PrintReq
- PrtReqLbl
- PrintRx
- Record
- RqstAdmin
- Mail

Dictionary: Communication Method

Communication Method Picklist

Contents of Communication Method \ OID - Lab/Imaging/Referrals/Follow U

EntryCode	EntryName	EntryMnemonic	Inactive	Enforced
CallOrder	Call Order	CallOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Perform	Perform Order	Perform	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PrintReq	Print Requisition	PrintReq	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PrtReqLbl	Print Requisition Label	PrtReqLbl	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PrintLbl	Print Label	PrintLbl	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Record	Record	Record	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RPL	Send to Performer	RPL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
eReferrals	eReferrals	eReferrals	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add Picklist Edit Picklist Add Entry Remove Entry Copy Sort

Close

Clinical Document Source Dictionary Configuration

The two important pieces for you as an organization is to review and understand are how you want to automatically Import the message.

Import available entries include:

- **Nothing:** This is the default value and specifies that nothing is Imported.
- **Document Only:** Specifies that only a document is created. Discrete data is not parsed. In the early stages of adoption, it is best practice to set to “Document Only” until you as an organization feel comfortable with the clinical content being sent.
- **Document and Parse Discrete Items:** Specifies that a document is created and any discrete items included in that CCDA are parsed and available for inclusion in the Clinical Desktop

Auto Submit Configuration

❑ Enable the settings for Community Endpoints

- Auto Submit= N
- Active = Y
- Direct-HISP = Y
- Supports CCDA = Y

The screenshot shows the TW Admin interface with the 'Comm Admin' tab selected. The 'Auto Submit' sub-tab is active. The 'Community Endpoints' table is visible, showing the configuration for 'Allscripts Community Direct Message...'. The 'Auto Submit' column is set to 'N', 'Active' is 'Y', 'Direct-HISP' is 'Y', and 'Supports CCDA' is 'Y'. The 'Synchronize Communities' button is at the bottom.

Community Endpoints	Auto Submit	Active	Direct-HISP	Supports CCDA
Allscripts Community Direct Message...	N	Y	Y	Y

Preferences Configuration

- ☐ **Community/Auto CED Submittal-** Select Yes for ACDM
- ☐ **Community/Patient Data Sharing Security-** Opt-in or Opt-out.
- ☐ **CEDVerification** Y or N value
- ☐ **CEDVerificationRouting** [4 Options](#)

Preference: General ▼		Ent/Org/User Settings Enterprise ▼	
Preference ▼	SubKey ▼	Description ▼	Value ▼
AuthenticationHostWhitelist		Authentication HostWhitelist in CSV format	127.0.0.1;::1;::1
CareGuideDefaultOpeningSection		CareGuide Default Opening Section	All
CEDVerification		Clinical Exchange Documents Verification	Y
CEDVerificationRouting		Clinical Exchange Documents Verification Routing	Recipient then Clinical Exch...
ClinEGuide	Credentials	ClinEGuide Credentials (User/Pwd)	
Community/Automatic CED Submittal		Automatically submit CEDs to communities when patient ch...	Y
Community/Patient Data Sharing Security		Default sharing with Communities (Opt-in) or not share (Opt...	Opt-in

CEDVerificationRouting

4-Options

- ☐ Clinical Exchange Document team
- ☐ Recipient, then PCP, then Clinical Exchange Document Team
- ☐ Recipient, then Clinical Exchange Document Team
- ☐ PCP, then Clinical Exchange Document Team

Referring Provider Dictionary

The most important thing to setup in this dictionary, is adding a Direct ID for the referring provider. You will not be able to send referrals electronically from the referral order if the receiving provider does not have a Direct ID.

Referring Provider

Allscripts, Referring MD

☒ All

☐ Include InActive

☐ Is Practice

☐ Is Agency

Name: Allscripts, Referring MD

Code: AREF

Mnemonic: AREF

Default	#	Direct ID	Community

Set Default

Remove

Add another Direct ID

Referring Provider Dictionary- con't

Enter Direct ID -- Webpage Dialog

Direct ID:

Community:

OK Cancel


Direct ID:

Default	#	Direct ID	Community
Y	1	allscripts.general@abc.ascdirect.com	Allscripts Community Direct Messaging

Set Default Remove Add another Direct ID

Referring Providers and User/Providers

Referring Provider

Allscripts, Referring MD  ☐ Include InActive

☐ Is Practice ☐ Is Agency

Name: Allscripts, Referring MD

Code: AREF Mnemonic: AREF

Last: First: MI:

Prefix: Suffix:

Address1:

Address2:

Address3:







City: State:

Zip: Zip Internat:

Phone: Ph. Internat:

Country: County:

Fax: Fax Internat:


Linked Provider: Allscripts, General Surgeon  Def CC Method:     

Specialty: General Surgery Inactive: ☐

NPI: Gender:

Email Address: Mobile:

Language: AMHARIC
ARABIC
ARMENIAN
BENGALI

Linked User: 

Credentials:


TWUser Admin

Results Admin
Queue Admin
Provider Admin
Pt List Admin
Report Admin
Security Admin
Task Admin
TWUser Admin
Utilities
Work Def Admin
V10 Note Admin

User/Provider: Associate Midlevel Provider: mlrprovider@allscripts.com

Def. CC Method: Review Task Transcribe Difficulty: 1.0

Prescribing Authority Levels - DEA Schedules
☒ II ☒ III ☒ IV ☒ V
☐ Rx Supervision Required

Signature Image: 

☒ Billing Provider ☒ Schedulable ☐ Don't Generate "Send Charge" Tasks ☒ Is Referring Provider
☒ PCP ☐ Secure Schedule ☐ Show Optional Clinical Messages ☒ cc When Others Verify Their Results

Address

Address:

City: Work Phone:

State: Home Phone:

Zip Code: Fax #:





Default	#	Direct ID	Community
Y	1	upgrad.test@abc.allscriptsdirect.net	Allscripts Community Direct Messaging

CCDA Templates Review & Configuration

What is a Summary of Care (SOC)?

A “Summary of Care(SoC)” is a document delivered in CCDA format that includes diagnostic test results, problem lists, medication lists and medication allergy information. The SoC document in CCDA format is the document that is provided as part of the Transition of care and referral workflows in the Allscripts enterprise EHR.

This is the Doc Type recognized for MU calculations.

Template Name		Template Type	
Allscripts Clinical Summary-RTF		Visit Summary-RTF	
Allscripts Clinical Summary-CCDA		Visit Summary-CCDA	
Allscripts Summary of Care		Summary of Care	
Allscripts CCD		CCD	

What is included in the Delivered SOC:



Section	RTF	CCDA	SOC	Allscripts CCD
Patient Details	X	X	X	X
Reason For Visit	X	X	X	X
Chief Complaint	X	X	X	X
Functional & Cognitive Status	X	X	X	X
Assessments	X	X		
Treatment Plans	X	X	X	X
Interventions	X	X	X	X
Instructions		X	X	X
Vital Signs	X	X	X	X
Medications	X	X	X	X
Medication Administred		X	X	X
Problems	X	X	X	X
Allergies	X	X	X	X
Results	X	X	X	X
Past Medical History	X	X	X	X
Procedures		X	X	X
Surgical History	X			
Immunization Hx	X	X	X	X
Family History			X	X
Social History	X	X	X	X
Advanced Directives	X	X	X	
Encounter	X	X	X	X
Patient Care Team	X	X	X	X
Document & Product Details	X	X	X	X

Review Referring Documents

Document Type	Description
CCDA-Import From External	This is the document type that is used for handling any incoming CCDA-CCD from non-Referral workflows. This is not a Summary of Care CCDA document.
CCDA-Referral	This is the CCDA document that relays information entered within the Referral order when an eReferral is sent. It is used to trigger the Referral Request task when received by a TouchWorks user and carries the RefID Tag that makes the Referral Loop possible in TouchWorks to TouchWorks workflows. In addition to patient demographic details, it carries the scheduling instructions and the reason for referral that were entered while creating the order. It does not contain other clinical data like the Summary of Care Document
CCDA- Unstructured	When a referral order has document and result attachments other than the Summary of Care-CCDA those documents are converted into this document type to handle the unstructured or non-discrete type of data contained in them.
Manual Export Summary of Care CCDA	This is the Summary of Care Document in CCDA format that is used for any Transition of Care when exported via the Export CED workflow. This document type is recognized for meaningful use calculations
Summary of Care-CCDA	This is the Summary of Care Document in CCDA format that is created when sent as an attachment with an electronic Referral Order. This document type is recognized for meaningful use calculations and reporting for Transitions of Care.

Task Configuration

Tasks, Tasks and More Tasks!

There are multiple New Task Types for E-referrals

Outbound e-Referral & SoC Tasks



SOC
Acknowledgement
Task

Referral Failed
Task

Manual SoC
Failed Task

Task Configuration- con't

Inbound e-Referral Request Tasks



Referral
Request
Task

Referral
Response
Task

Referral
Response
Failed Task

CED Match
Patient
Task

Verify CED
Document
Task

Verify CED
Item Task

New Task Configuration HF 14

New Inbound Community Tasks



Verify External
Document Task

Verify
Imported
Items Task

Workflow



Order Details



Allscripts, Betsy 71 YO F DOB: 13Mar1943 Other 3/12/2015

Cardiology Referral

For: [1] Chest discomfort

Status: Active [Details](#)

To Be Done: 12Mar2015  
Overdue: 26Mar2015 02:47PM

Recipient: Allscripts Referring MD, General Surgery  

☐ First Available Provider

☐ Specialist Response Received ☐ Record w/o Ordering

Order [click](#) [Details](#) [Attachments](#) [Questions](#) [Add'l Details](#) [Charging](#) [Encounters](#) [History](#) [Annotations](#)



Reason: For: Chest discomfort
976 chars remaining


☒ Insert Problem


[TT](#)
[Clear](#)

Perform : Not Applicable

eReferrals Routine ☒ Print Copy

Ordered By: ☒ Allscripts, Cardiologist  ☐ 

Supervised By: Allscripts, Cardiologist  **Authorization:** **Prospective**

Managed By: Allscripts, Cardiologist  **Type:** Consult Only

For Scheduler: Needs an appointment by 4/30/15
969 chars remaining

[TT](#)
[Clear](#)

For Patient:

[Save and Return to ACI](#) [Save and Close ACI](#) [Cancel](#)

Task List

[Personalize](#)

Total Active Tasks: 1376

View: Show:

Last Updated: 09/16/2014 4:17 PM



P	D	Task	Patient	Assigned To	Created By	Created On	Status	ID	Due	MRN	Refresh List
Y		SOC Acknowledgement	TEST,SENIOR	TEST, [redacted]	System	09/04/2014 01:20	Active	57343455		612286281	
Y		SOC Acknowledgement	TEST,SENIOR	TEST, [redacted]	System	09/10/2014 04:37	Active	57343950		612286281	

Questions?

Thank you for joining us today.

For additional assistance contact us through our website at
www.galenhealthcare.com

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Last Name *
Company *
Phone *
Email *
City *
State/Province *
Details

Submit

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Select Recipient

Allscripts, Betsy 71 YO F DOB: 13Mar1943
Other 3/12/20

☒ Quick Search
☐ Advanced Search
☐ Browse Favorites

Quick Search

Search Results
Showing 1 results

			Ext	Last/Prac/Agency	First	MI	Specialty	Practice	City	State	eRef
				Allscripts, Referring MD			General Surgery				

Address:

Primary Tel :

Primary Fax :

email :

Practice :

Practice Address:

Sex :

Language :

Direct Address :

External Recipient : No

Accepts eReferrals : No

Source : Referring Provider Dictionary - Referring Provider

back

Order Details

Allscripts, Betsy 71 YO F DOB: 13Mar1943
Other 3/12/2015

General Surgery Referral

For: [1] Chest discomfort

Status: Active
Details

To Be Done: 12Mar2015
Overdue: 26Mar2015 03:02PM

Recipient: Allscripts Referring MD, General Surgery

☐ First Available Provider
☐ Specialist Response Received
☐ Record w/o Ordering

Order
Details
Attachments
Questions
Add'l Details
Charging
Encounters
History
Annotations

Attachments

Item	Enc Date	Specialty	Owner	Enc Owner
There are no items to show in this view				

click

Attach Documents and Results
Generate Summary of Care

Attach Documents and Results to Referral

Allscripts, Betsy 71 YO F DOB: 13Mar1943

Other 3/12/2015

AttachDocumentAndResultsToRe

Chart viewer

All by Section by Sub-Section

None

9 of 20 Chart Items (0 Invalid and 10 Audit Items)

Notes

Consults

ACN - Consult - Allscripts, Provider; Enc: 18Jun2014 - Other - Allscripts, Provider (Family Medi

Diagnostics

Laboratory

CBC With Partial Differential - Done: 27May2014 - Allscripts, Provider; Enc: 27May2014 - Char

sLaboratory Results - Allscripts, Provider; Enc: 26Apr2011 - Form Encounter - Allscripts, Provi

CBC With Partial Differential - Done: 27May2014 - Allscripts, Provider; Enc: 26Apr2011 - Form

Radiology/Imaging

sRadiology Results - Allscripts, Provider; Enc: 28May2014 - Form Encounter - Allscripts, Provi

Attach To Referral

Selected Documents and Results

There are no items to show in this view

Preview

Previous

Next

TouchWorks Clinic

123 Main Street

Anywhere, IL 60048

Patient: Allscripts, Betsy

90 Main St.

Apartment 3

Chicago, IL 60654

Age/Sex/DOB: 71 yrs F 13-Mar-1943

EMRN: ZZZTW03

OMRN: ZZZTW03

Home: (312) 555-1114

Work: (847) 608-3515

Results

Lab Accession #

0001

Ordering Provider:

Allscripts, Provider

Performing Location:

Collected:

05/27/2014 4:44:00PM

Resulted:

05/27/2014 4:44:00PM

Verified By:

Allscripts, Provider

Auto Verify:

N

CBC With Partial Differential

Stage: Final

Test	Result	Units	Flag Reference Range
WBC	Result Document Attached		H
RBC	Result Document Attached		A
Hemoglobin	Result Document Attached		A
Hematocrit	Result Document Attached		H
MCV	Result Document Attached		A
MCH	Result Document Attached		A
MCHC	Result Document Attached		VS
RDW	Result Document Attached		W

OK

Cancel

Order Details

Allscripts, Betsy 71 YO F DOB: 13Mar1943
Other 3/12/2015

General Surgery Referral

For: [1] Chest discomfort

Status: Active
Details

To Be Done: 12Mar2015
Overdue: 26Mar2015 03:02PM

Recipient: Allscripts Referring MD, General Surgery

☐ First Available Provider

☐ Specialist Response Received
☐ Record w/o Ordering

Order
Details
Attachments
Questions
Add'l Details
Charging
Encounters
History
Annotations

Attachments

<input checked="" type="checkbox"/>	Item	Enc Date	Specialty	Owner	Enc Owner
<input checked="" type="checkbox"/>	CBC With Partial Differential - Allscripts, Pr...	27May2014	Family Medicine	Allscripts, Provider	Allscripts, P

click

Attach Documents and Results
Generate Summary of Care
☒ Generate Summary of Care on Save

Summary of Care Editor (Allscripts Summary of Care)

Allscripts, Betsy 71 YO F DOB: 13Mar1943

Print Preview

☒ Patient Details

☒ Reason For Referral

☒ Functional & Cognitive Status

☒ Problems

☒ Medications

☒ Allergies

☒ Past Medical History

☒ Procedures

☒ Immunization History

☒ Family History

☒ Social History

☒ Vital Signs

☒ Results

☒ Treatment Plans

☒ Interventions

☒ Encounter

☒ Patient Care Team

☒ Document & Provider Details

☒ Family history of BP (high blood pressure): Mother, Sister

☒ Family history of DM type 2 (diabetes mellitus, type 2): Father

☐ Family history of Mood Depressed: Grandparent

Comments: (231 Chars remaining)

Free text comments here

click

ExportCancel


Order

☐ Specialist Response Received
 ☐ Record w/o Ordering

[Details](#)
[Attachments](#)
[Questions](#)
[Add'l Details](#)
[Charging](#)
[Encounters](#)
[History](#)
[Annotations](#)

Order Instructions:

Attachments

<input checked="" type="checkbox"/>	Item	Enc Date	Specialty	Owner	Enc Owner
<input checked="" type="checkbox"/>	 CBC With Partial Differential - Allscripts, Pr...	27May2014	Family Medicine	Allscripts, Provider	Allscripts, Provic
<input checked="" type="checkbox"/>	Manual Export Summary of Care-CCDA	12Mar2015		Allscripts, AppAdmin	

[back](#)