



# 2024 Workflow Workshop Webinar Series

Promoting Interoperability  
Health Information Exchange:  
Send Summary of Care



# Agenda

## Provide Patients Electronic Access to Their Health Information

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- Measure Overview
- 
- Measure Specifications
- 
- Measure Special Considerations
- 
- Recommended Workflows
-

# HIE – Send Summary of Care

# Measure Overview

HIE – Send Summary of Care	
Description	<p>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:</p> <ol style="list-style-type: none"><li>1) creates a summary of care record using certified electronic health record technology</li></ol> <p>AND</p> <ol style="list-style-type: none"><li>2) electronically exchanges the summary of care record</li></ol>
Exclusion	<p>Any eligible clinician who transfers a patient to another setting or refers a patient fewer than 100 times during the performance period</p>
Points Available	Up to 15


# Measure Specifications

<u>Denominator</u>	<u>Numerator</u>
<p>Documented transition out of care for the provider during the PI reporting period OR referral to another facility or provider</p> <ul style="list-style-type: none"><li>• <b>QP Translation:</b> The denominator for this measure is the total number of referrals that the practice sends</li></ul>	<p>Number of transitions of care and referrals in the denominator where the summary of care was created using the certified electronic health record technology and exchanged electronically</p> <ul style="list-style-type: none"><li>• <b>QP Translation:</b> The numerator for this measure is the number of referrals that were sent electronically</li></ul>

Special Note: For a complete list of qualifying encounters, please reference the measure papers

# Measure Special Considerations

- When the referral is sent electronically, the “Specialty/specialist name/site” radio button and appropriate specialty must be populated in the referrals orders template to receive credit

 Referrals Order ×

Assessments	My Plan	A/P Details	Labs	Diagnostics	Referrals	Office Procedures	Cosign Orders
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Insurance name:  Policy #:  [Medications | Immunizations](#)

To: ☒ **Specialty/specialist name/site**

☐ Obstetrics

☐ Therapies/Rehabilitation [Exclusions](#)

☐ DME



Provider name: [Address Detail](#) Location:

# Measure Special Considerations

- Eligible Providers must document **ALL** referrals and transitions of care that they order to accurately account for the denominator for this measure
  - **Note:** This includes referrals that were NOT sent electronically
- To receive credit for this measure, the following items (or an indication of none) must be documented for the patient:
  - ✓ Problems
  - ✓ Medications
  - ✓ Medication allergies
- The patient must have the “current gender” field documented
  - Your practice can choose to have “current gender” default to “birth gender”

# Measure Special Considerations

- The referring provider must have confirmation that the referral was received to receive credit for this measure
  - **QP Tip:** The comments section on the referrals order template will indicate whether the CCD-A has been successfully delivered to the recipient

Clinical information/  
comments:

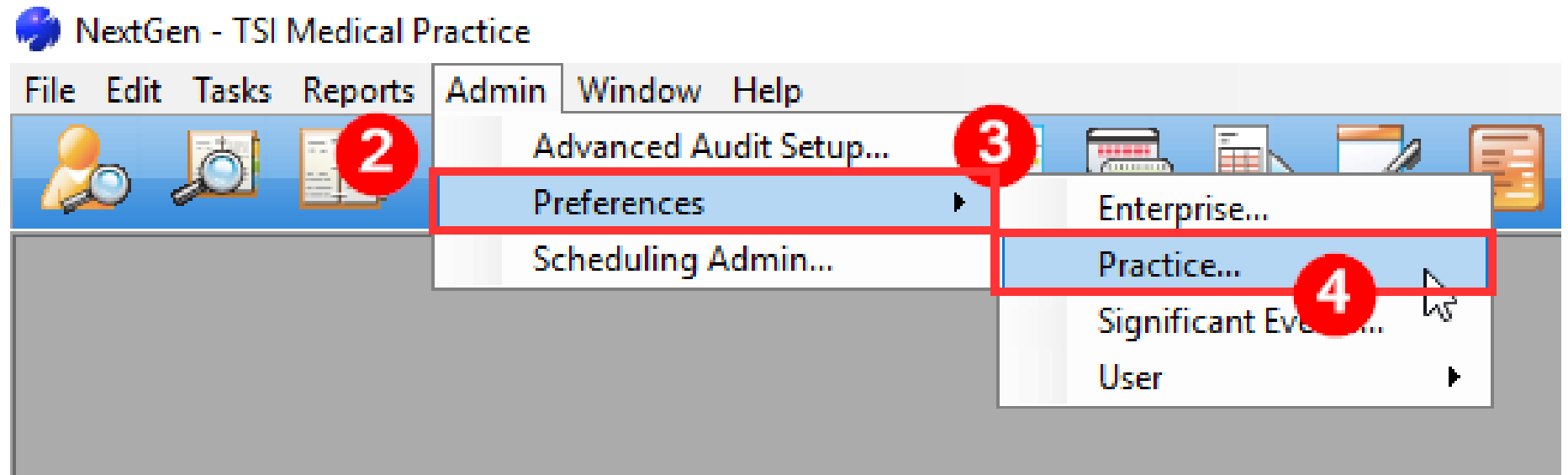


\*\* 03/20/2024 09:57 AM EDT: CCD sent.  
\*\* 03/20/2024 09:57 AM EDT: Message delivered to the  
recipient.  
\*\* 03/20/2024 10:02 AM EDT: CCD sent.



# How to Set Current Gender in Practice Management

1. Navigate to NextGen EPM
2. Click the Admin tab
3. Hover over Preferences
4. Click “Practice...”



# How to Set Current Gender in Practice Management

5. Click “General” under Preferences
6. Check the box next to “Default M/F Birth Sex to Current Gender

**Practice Preferences**

**Preference List**

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data/Fee Ticket
- EHR
- Eligibility Verification
- Encounters
- External
- General**
- Holidays
- Imaging
- Invoices
- Itemized Bills
- Libraries
- Medication
- NextGen EDI Services
- NextGen Share
- Orders Module
- Patient Information Bar
- Patient Notifications
- Patient Pay
- Payment Processing
- Pre-Services
- Printing
- Programs
- Provider
- Reports
- Resources
- Sliding Fee
- Statements
- Tasks
- Taxes
- Tran Codes

**General Options**

- ☒ Check for duplicate SSN
- ☒ Check for duplicate last name, birth date, sex
- ☒ Auto-closing
- ☐ Privatize patient list
- ☒ Display city on person lookup
- ☐ Prompt for password when application is restored from minimized session
- ☐ Enable outsourcing
- ☐ Allow alphanumeric characters in SSN
- ☒ Exclude expired patients default
- ☒ Enable Case Management
- ☒ Allow encounter payers to differ when case is attached
- ☒ Display contact preference
- ☒ Display L4SSN
- ☐ Display phonetic search
- ☒ Check for duplicate payer name, address, or contact phone
- ☐ Exclude all unknown SSNs
- ☐ Force the selection of an existing payer name, address, or contact phone

Default Area Code:  Payer User-Defined 1 Name:  Unknown SSN:

Advisor Message:  Advisor Hyperlink:  Advisor Hyperlink Text:  Medical Necessity State:

Advisor AR Avg Days Date:  First Quarter Starts On...:  Person Lookup Search By:

**Req on Relationship**

Address	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>
Zip	<input checked="" type="checkbox"/>
Birth Date	<input checked="" type="checkbox"/>
Sex	<input checked="" type="checkbox"/>

Status bar information:  Display Here:  National Provider ID:

☐ ERA- Include check number, date and amount in duplicate checking

☒ Require DOB and Sex on Chart and Encounter for guarantor

☒ Display Veteran indicator

☒ Display Smoker indicator

Set Process Date for Encounter Rate SIM and Encounter Rate Adjustments as:

**6** ☒ Default M/F Birth Sex to Current Gender

Auto Logout Interval:  Minutes

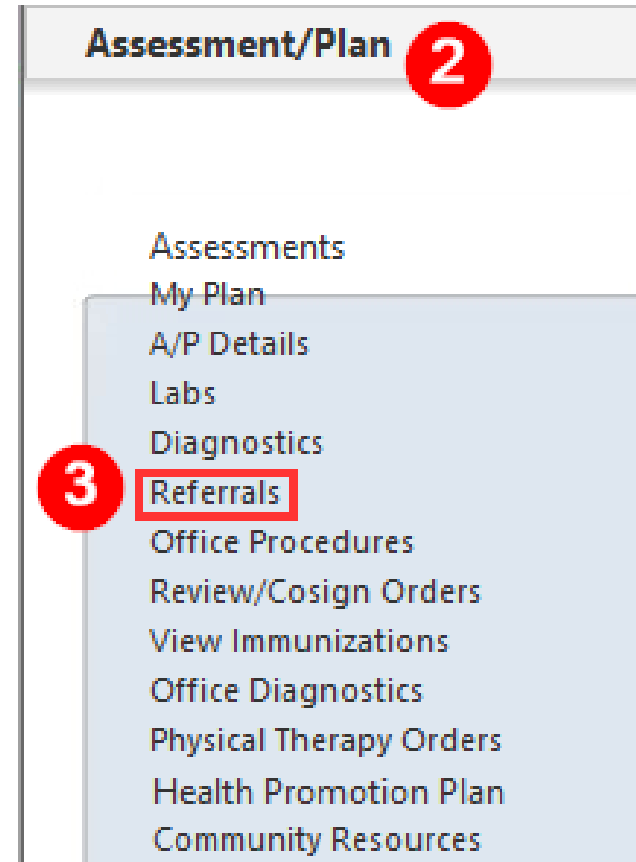
Auto Minimization Interval:  Seconds

OK Cancel

## Recommended Workflow for Documenting and Sending a Referral

### ❖ From the SOAP Template

1. Navigate to the SOAP Template
2. Scroll to the “Assessment/Plan” tab
3. Click “Referrals”



## Recommended Workflow for Documenting and Sending a Referral

4. Click the “Specialty/specialist name/site” radio button in the “To:” field
5. Click the orange NextGen Share button

**Referrals Order**

Assessments	My Plan	A/P Details	Labs	Diagnostics	Referrals	Office Proc
-------------	---------	-------------	------	-------------	-----------	-------------

Insurance name: Medicaid Of Nc Carolina Ac Policy #: 123456789999

**To:**

- ☒ Specialty/specialist name/site
- ☐ Obstetrics
- ☐ Therapies/Rehabilitation
- ☐ DME

**Specialty:**

**Provider name:** [Address Detail](#) **Location:**

☐ Internal referral

Authorization required: ☐ No ☐ Yes

**Diagnosis:**

## Recommended Workflow for Documenting and Sending a Referral

6. Search for the provider to whom you are referring in the NextGen Share pop-up
7. Choose the provider to whom you are referring

### NextGen Share Search

#### Search

Use the search options below to find Providers and Organizations

#### Provider Directories to Search

☒ My EHR

☒ Share

Provider Name, Org Name, or NPI 

John Smith **6**

#### Specialty

Location (City, State, or Zip)



**HIGHSMITH, JOHN**

Directory: Secure Exchange Solutions

Organization: HMS Service - Patient...



**7**



**John, Smitha**

Directory: E-Clinical Direct

Specialty: Family

Organization: Northern Heart Special...



**Johnson, Denise**

Directory: Surescripts

Specialty: Physician Assistant

Organization: DUPAGE MEDICAL G...



# Recommended Workflow for Documenting and Sending a Referral

8. Document the appropriate specialty
9. Add a description for the diagnosis
10. Click “Add”

Referrals Order

Assessments My Plan A/P Details Labs Diagnostics **Referrals** Office Procedures Cosign Orders

Insurance name: Medicaid Of Nc Carolina Ac Policy #: 123456789999 [Medications | Immunizations](#)

To: 8

☒ Specialty/specialist name/site  
☐ Obstetrics  
☐ Therapies/Rehabilitation [Exclusions](#)  
☐ DME

Specialty: Allopathic & Osteopathic Physicians : Surgery : Vascular Surgery CI

Provider name: [Address Detail](#) Location:  ☐ Internal referral

KIRKLAND, JOHN

Authorization required: ☐ No ☐ Yes

Diagnosis: 9

Description: Code:  
 1. Rheumatoid arthritis, unspecified M06.9  
 2.    
 3.    
 4.

Services requested:  
☐ Consult ☐ Evaluate and treat ☐ Follow-up and treat ☐ Assume care ☐ Surgery ☐ Diagnostic testing

Clinical indications:  
 Reason for referral:  Time limit:  Timeframe:

Clinical information/Comments:

Attachments:

Instructions:  
☐ Patient referral/instructions given  
☐ Summary of Care/Record sent [Instructions Detail](#)

Referrals ordered: 10

☒ Incomplete ☐ Completed (Highlight row to update)

Add
Update
Remove
Clear All


## Recommended Workflow for Documenting and Sending a Referral

11. Click the order so that it is highlighted

12. Click “Share”

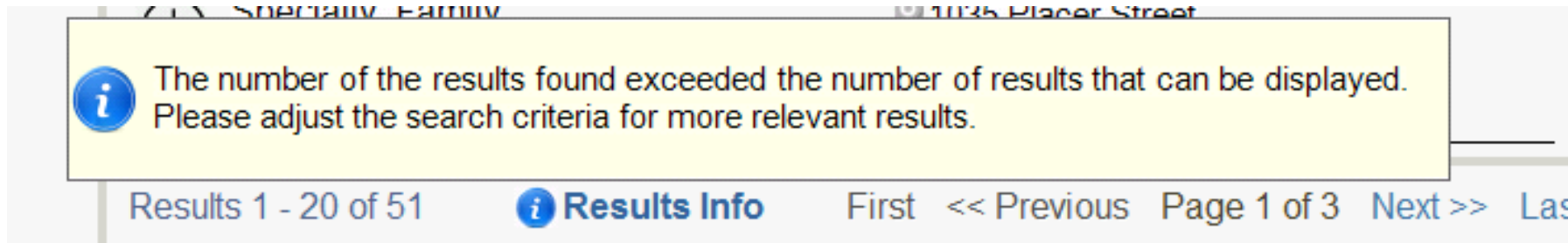
Status	Ordered Date	Done	Code	Diagnosis	Order	Referral	Reason
ordered <b>11</b>	06/27/2024		M06.9	Rheumatoid arthritis, unspecified	Referrals: Allopathic & Osteopathic Physicians : Surgery : Vascular Surgery. KIRKLAND, JOHN	processed	

**12**

Close **Share** Quick Task  Send Task

# Tips for Searching the NextGen Share Directory

- Searching by provider last name ONLY will result in too many records returned
  - There is a maximum number of records that can be returned



A screenshot of the "NextGen Share Search" interface. The title bar says "NextGen Share Search". Below it, the word "Search" is followed by the instruction: "Use the search options below to find Providers and Organizations". Under the heading "Provider Directories to Search", there are two checked checkboxes: "My EHR" and "Share". Below this is a text input field labeled "Name (Last, First or Organization)" containing the text "Smith". Another text input field labeled "Specialty" is empty. A third text input field labeled "Location (City, State or Zip)" is also empty. At the bottom, there are four icons: a clock, a star, a red X, and a magnifying glass.

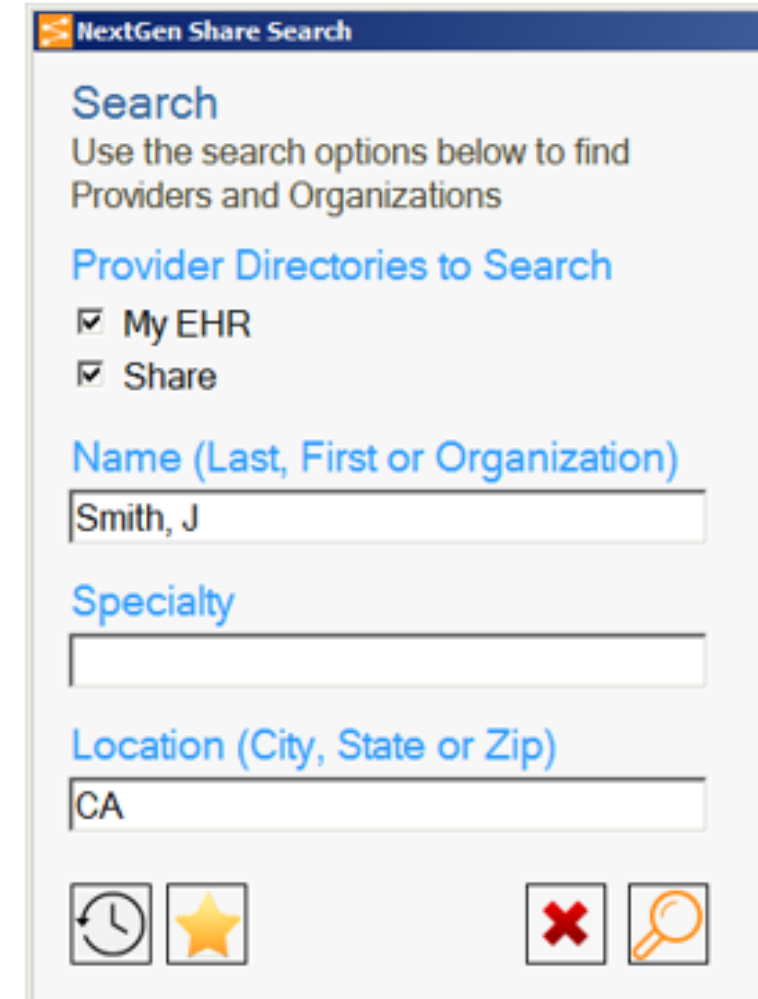


# Tips for Searching the NextGen Share Directory

## Refine your search to narrow down results

If searching by provider name, enter the provider's last name, and as much of the first name as you know

- Example: "Smith, John" in the *Name* field
- Example: Use "CA" instead of "California"



The screenshot shows the 'NextGen Share Search' interface. It includes a 'Search' section with instructions to find providers and organizations. Below this are checkboxes for 'Provider Directories to Search', with 'My EHR' and 'Share' both selected. There are three input fields: 'Name (Last, First or Organization)' containing 'Smith, J', 'Specialty' (empty), and 'Location (City, State or Zip)' containing 'CA'. At the bottom, there are icons for a clock, a star, a red X, and a magnifying glass.

NextGen Share Search

**Search**  
Use the search options below to find Providers and Organizations

**Provider Directories to Search**

☒ My EHR  
☒ Share

**Name (Last, First or Organization)**  
Smith, J

**Specialty**

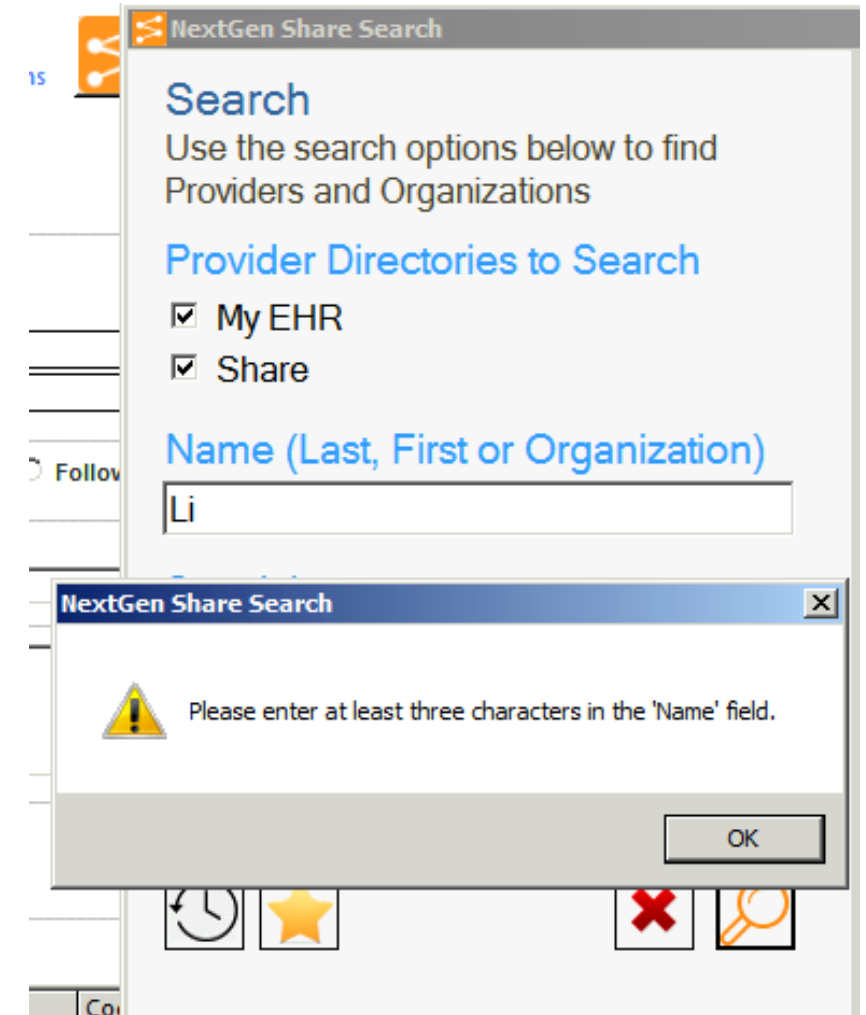
**Location (City, State or Zip)**  
CA

⌚ ★ ✖ 🔍

# Tips for Searching the NextGen Share Directory

For providers with two-character last names, include a comma after the last name

- Ex: Dr. Jet Li
- **3 character minimum**
  - You should search **Li,**



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