



# 2024 Workflow Workshop Webinar Series

Quality

eCQM 50: Closing the Referral Loop



# Agenda

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## eCQM 50: Closing the Referral Loop

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- Measure Overview
  - Measure Specifications
  - Measure Special Considerations
  - Recommended Workflow
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# eCQM 50: Closing the Referral Loop

# Measure Overview

eCQM 50: Closing the Referral Loop	
Description	Percentage of patients with referrals, regardless of age, for which the referring provider receives a report from the provider to whom the patient was referred
Exclusion	None
Points Available	Up to 10

# Measure Specifications

<u>Denominator</u>	<u>Numerator</u>
<ul style="list-style-type: none"><li>• A qualifying encounter during the measurement period <b>AND</b></li><li>• A referral order is placed on or before October 31 during the measurement period</li></ul>	<ul style="list-style-type: none"><li>• Consultant report received OR completed after first referral order performed</li></ul>

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

# Measure Special Considerations

- **Referral:** A request from one clinician to another clinician for evaluation, treatment, or co-management of a patient's condition
- **Report:** A written document prepared by the clinician/staff to whom the patient is referred and provides summary of care information about findings, diagnostics, assessments and/or plans of care and is provided to the referring clinician
- The clinician who refers the patient to another clinician is the clinician that is held accountable for the performance of this measure
- When documenting a referral using the **Referrals Order** window, Podiatry specialty and cardiac rehabilitation therapy are not in the value set and will not meet the criteria for this measure
- Only the first referral made between **January 1 – October 31** of the measurement period will be considered for this measure to allow ample time for the referring clinician to collect the consult report by the end of the measurement period
- If there are multiple referrals for a patient during the measurement period, use the first referral
- It is possible to document “communication” of the report after the measurement period, if it is documented after the referral
  - To satisfy the measure for reporting, the communication needs to occur before the deadline for submitting data

# Recommended Workflow

## Part 1: Documenting the Referral

- From the **SOAP** Template

### 1. Scroll to the **Assessment/Plan** tab

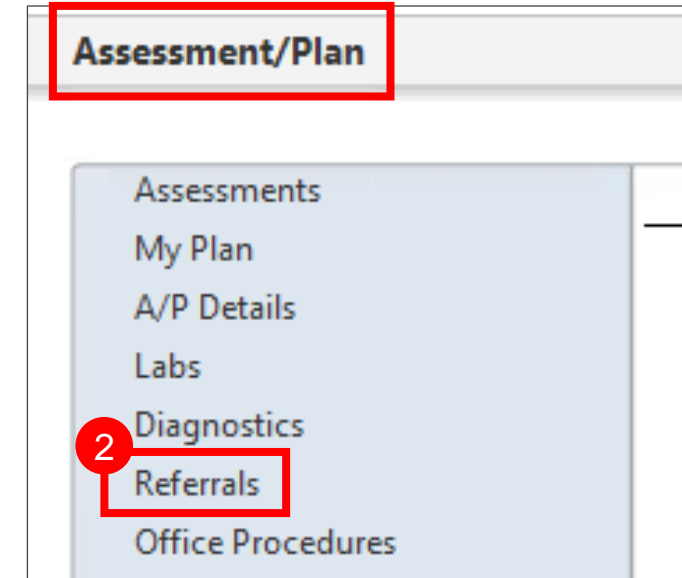
The screenshot displays the eCQM interface for documenting a referral. The top navigation bar includes tabs for Intake, Histories, SOAP (highlighted), Finalize, and Checkout. Below these are various clinical tools like Standing Orders, Immunizations, Radiology, Labs, Joint Injection, Order Management, RHE ScoreCard, and Outcomes. The left sidebar shows the 'Assessment/Plan' tab (highlighted) with a list of sub-items: Assessments, My Plan, A/P Details, Labs, Diagnostics, Referrals, and Office Procedures. A red arrow points from the 'SOAP' tab to the 'Assessment/Plan' tab, indicating the next step in the workflow.

1 Scroll Down to Assessment/Plan

# Recommended Workflow

## Part 1: Documenting the Referral

- From the **Assessment/Plan** tab
  - Click **Referrals**
  - Click **Specialty/Specialist name/site** radio button
  - Click on the **orange NextGen Share** button



A screenshot of the 'Referrals Order' form. The form has a header with tabs: Assessments, My Plan, A/P Details, Labs, Diagnostics, Referrals, Office Procedures, and Cosign Orders. The 'Referrals' tab is selected. Below the tabs, there are input fields for 'Insurance name:' and 'Policy #:'. To the right, there is a link for 'Medications | Immunizations'. Below these, there are radio buttons for 'Specialty/specialist name/site', 'Obstetrics', 'Therapies/Rehabilitation', and 'DME'. The 'Specialty/specialist name/site' radio button is selected and highlighted with a red box and a red circle with the number '3'. To the right of the radio buttons, there is a 'Specialty:' label and a text input field. A red box with a red circle containing the number '4' highlights an orange 'NextGen Share' button (a square with a circular arrow icon) located between the radio buttons and the 'Specialty:' label. Below the 'Specialty:' field, there are input fields for 'Provider name:', 'Address Detail', and 'Location:'. There is also a checkbox for 'Internal referral'. At the bottom, there is a section for 'Authorization required:' with 'No' and 'Yes' radio buttons.



# Recommended Workflow

## Part 1: Documenting the Referral

5. Type the name of provider to whom you are referring in the **NextGen Share** pop-up
6. Click on the Magnifying Glass
7. Select the provider to whom you are referring to the list on the right

The screenshot shows the 'NextGen Share Search' window. On the left, the 'Search' section includes a text input field containing 'Benson, William' (highlighted with a red box and a red circle with the number 5). Below this are checkboxes for 'My EHR' and 'Share', both checked. There are also input fields for 'Specialty' and 'Location (City, State, or Zip)'. At the bottom of the search section are icons for a clock, a star, a person, a red 'X', and a magnifying glass (highlighted with a red box and a red circle with the number 6). On the right, a list of search results is displayed. The first two results are for 'BENSON, ERIK' with 'Directory: Surescripts' and 'Specialty: Physician Assistant'. The third result is for 'Benson, William' (highlighted with a red box and a red circle with the number 7), with 'Directory: Share' and 'Organization: TSI Medical Practice'. To the right of this result is contact information: 'william.benson.p1@direct.tsihealthcar...', '+1 919 982-3948', and '100 Europa Drive, Suite 200, Chapel Hill, NC 27517-0000'. At the bottom of the window, it says 'Results 1 - 11 of 11' and navigation links: 'First << Previous Page 1 of 1 Next >> Last'.

**QP Tip:** You can search by Last name, First name or partial name or NPI or full Direct address

# Recommended Workflow

## Part 1: Documenting the Referral

8. Document the appropriate specialty
9. In the **Diagnosis:** section, click in the **Description** field and select the appropriate diagnosis
10. Click **Add**
11. Click the referral in the grid to highlight the item
12. Click **Share**

Referrals Order

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

Insurance name:  Policy #:  [Medications | Immunizations](#)

To:

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

Specialty:  [Add Common assessment](#)

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

Authorization required: ☐ No ☐ Yes

Diagnosis:

Description:  Code:  Description:  Code:

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:  [Details](#)

Clinical information/Comments:

Attachments:

Instructions:

☐ Patient referral/instructions given [Instructions Detail](#)

☐ Summary of Care/Record sent

Referrals ordered: ☒ Incomplete ☐ Completed [\(Highlight row to update\)](#) **Add** [Update](#) [Remove](#) [Clear All](#)

Instructions:

☐ Patient referral/instructions given [Instructions Detail](#)

☐ Summary of Care/Record sent

Referrals ordered: ☒ Incomplete ☐ Completed [\(Highlight row to update\)](#) [Add](#) [Update](#) [Remove](#) [Clear All](#)

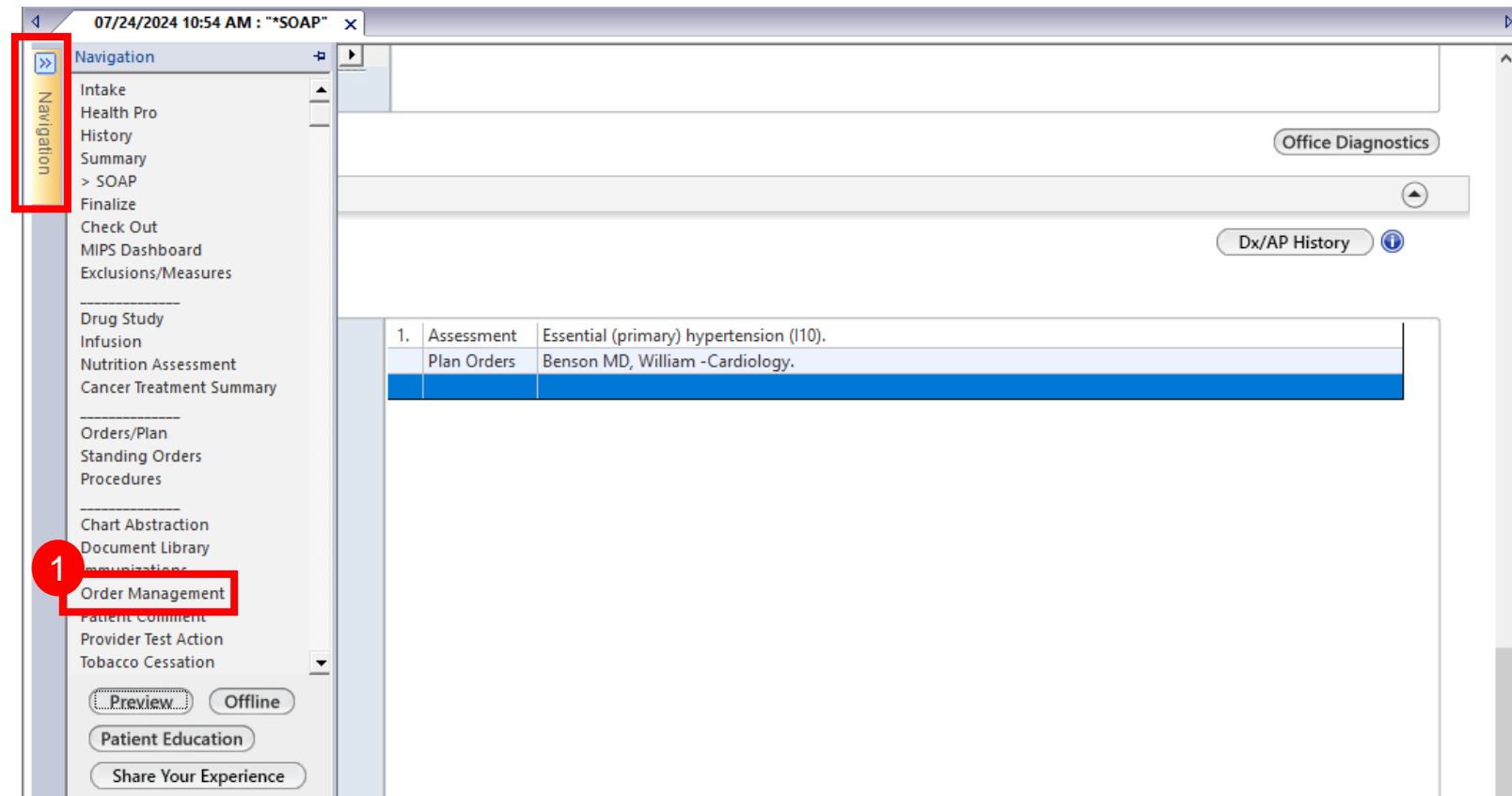
Status	Ordered Date	Done	Code	Diagnosis	Order	Referral	Reason
ordered	07/27/2024		I10	Essential (primary) hypertension	Referrals: Cardiology. Benson MD, William	processed	

**Close** **Share** [Quick Task](#) [Send Task](#)

# Recommended Workflow

## Part 2: Closing the Referral Loop

- Once you receive the report from the specialist, you will then need to close the referral loop in the EHR
- From the **Navigation Bar**
  - Click on **Order Management**



# Recommended Workflow

## Part 2: Closing the Referral Loop

2. Select the appropriate referral from the grid
3. Click **Edit**

**Order Management**

☒ All orders ☐ Diagnostics ☐ Lab orders ☐ Office services ☐ Procedures ☐ Referrals ☐ Other orders ☐ Immunizations ☐ Medications  
(Immunizations displayed separately; select radio button to display)

☐ Include all orders in document

[Lab/Radiology Order Processing](#)

(Highlight order to manage detail or to print referral.)

Dexa Scan

Status	Ordered	Completed	Order	Interpretation	Patient Notified	Report
ordered	07/27/2024	/ /	Referrals: Cardiology. Benson MD, William			
ordered	07/17/2024	/ /	Administer REMICADE 200mg IV every 5 weeks			
ordered	07/08/2024	/ /	Administer TYLENOL SINUS SEVERE 20mg PO PRN (ACTEMRA).			
ordered	07/08/2024	/ /	Administer METHYLPREDNISOLONE SODIUM SUCC 1,000mg IV PRN (ACTEMRA).			

Cosign Orders This Encounter

Provider Communications

Add Edit

# Recommended Workflow

## Part 2: Closing the Referral Loop

4. Click on either the **Received** **OR Completed** checkboxes
5. Enter the **Date** for the corresponding checkbox
6. Click **Save**

**QP Tip:** Run a Treatment Opportunity report and follow-up with patients who have been referred

"All Order Management" - [55 of 55]

Order: Referrals: Benson MD, William Code: [ ] Diagnosis: Essential (primary) hypertension Code: I10

Reason (for referral?): [ ]

Clinical information/ comments: [ ]

Attachments/ description: [ ]

Authorization

Authorization req'd: ☐ No ☐ Yes

Authorization #: [ ] Effective: [ ] Expiration: [ ] # Visits: [ ]

☐ Performed: [ ]

Consent

☐ Performed: [ ]

Scheduling

☐ Performed: [ ]

Timeframe: Target: [ ] Appt: [ ] Hr: [ ] Min: [ ] AM ☐ PM Location: [ ]

Obtained/performed/placed

☒ Performed: [ ] On: 07/27/2024 Reason/comment: [ ]

Seq: Strength: [ ] Dose: [ ] Units: [ ] Route: [ ] Side: [ ] Site: [ ] Position: [ ]

Lot #: [ ] Expiration: [ ] Brand name: [ ] Qty: [ ] Reaction: [ ]

Clear Manufacturer: [ ]

Education/instructions

☐ Performed: [ ]

On: [ ] Instruction(s) provided: [ ]

☒ Received: [ ] On: 07/27/2024 Reason/comment: [ ]

☒ Completed: [ ] On: 07/27/2024 Reason/comment: [ ]

☐ Patient Notified [ ]

Interpretation: [ ]

Result details: [ ]

Billing codes

Order: [ ] Mod 1: [ ] Mod 2: [ ]

Bill units: 1 Service date: 07/27/2024

Admin/other 1: [ ] Clear

Admin/other 2: [ ] Clear

Venipuncture: [ ] Clear

Additional information

☒ Summary of Care/Record Sent ☐ Internal Referral

Ordering provider: William Benson MD

☒ Ordered: [ ] On: 07/27/2024 Reason/comment: [ ]

☐ Verbal/standing order: [ ]

☐ Cosigned/signed off: [ ]

☐ Canceled: [ ]

Task

Submit to Superbill

Save

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