SRS Meaningful Use
Stage 2 Administrator
Configuration Training
Agenda

- Difference between Stage 1 and Stage 2
- Running the Stage 2 Report Card
- Doctor mappings
- Setting up report card exclusions
- Review of report card measures
- SRS Administrative set up for new Stage 2 measures
- Registry measures
- Training / Next Steps
- Resources
- Q & A
Review of Stage 2

- 17 core measures (report on ALL, exclusions are acceptable)
  - CPOE for Radiology and Lab orders
  - Direct messaging
  - Secure messaging
- 6 menu measures (only need to report 3) should not report exclusions
- Clinical Quality measure reporting
- Increase in measure thresholds
- Administrative set up for new measures
Running the Stage 2 Report Card

- Reports – Meaningful Use 2 Report Card
- In 2015, reporting period will be the full calendar year!
What to look for

- Columns
  - Eligible = denominator
  - Goal met = numerator

\[
\frac{\text{numerator}}{\text{denominator}} \times 100 = \text{Rate}
\]

- Colors
  - Green = good
  - Red = not meeting the measure
  - Yellow = marked as an exclusion
No provider listed – no problem!

- What if a provider is missing from the report card OR when you run the report card, you notice the eligible number of patients does not match with the number of appointments the provider has during that reporting date you ran the report for?
- CHECK your doctor mappings.
- Tools – Settings – Users – Doctor Mappings
  - Make sure the doctor association(s) is mapped to the appropriate SRS user
  - * Note, if your provider schedules his appointments under more than one doctor association name, all associations are mapped to the appropriate SRS user
Doctor Mappings

Entries in the Doctor Association table are used to establish the following two associations: first, to define the relationship between users of the practice management and SRS systems; and second, to define relationships between different SRS users, for example - one user who works in close association with another user (e.g., a nurse working closely with a doctor).

Use Polling Folder Message Forwarding (not Doctor Association) to define message forwarding for specific polling folders.
Report Card Measure Exclusions

- Not reporting due to lack of relevance
- Appears in yellow on the report card
- Must be set up for each provider
Setting Report Card Exclusions

- Tools – Settings – Users – Doctor Names – Pick the provider’s name – Meaningful Use Admin

Select the Stage MU2 to display the relevant measures
Review of Report card measures
New MU PowerTabs

- For Admins
  - eNote Admin
  - Custom Alerts (formerly Clinical Decision Support)
  - CQM/CDS Admin
- For Users
  - eNotes
  - Patient Reminder
  - Care Team Members
  - Transition of Care Import
  - Transition of Care Archive
New MU PowerTabs

- Reminder: Assign tabs to drawers
Configuring Vitals

- **Admin Settings:**
  - **Users > Profiles > Vitals**
“CPOE” Measures

- CPOE Labs (C-1)
- CPOE Radiology (C-1)
- Lab Results (C-10)
- Imaging Results (M-3)

Attend CPOE Admin Training for details on these measures and the required configuration.
Important CPOE reminders

- First steps – Identify who will be entering orders
  - Note: must be licensed healthcare professional
    - Set up authorized users in SRS
- Service facility set up
- Flow sheet / ROM
  - Legacy facility
- Tools > Settings > Users > Profiles > CPOE
C-7 Patient electronic access

- **Measure A**
  - >50% unique patients see have online access to health information within 4 business days
  - Record patient’s email address
  - Consent patient to the SRS Communicator (goes for Omedix clients too)

- **Measure B**
  - >5% unique patients seen view, download, or transmit their health information
  - Requires patient to have an active portal account
C-17 Secure Messaging

- >5% unique patients seen send electronic message to EP
- Two types of messages that are received from the patient portal
  - Amendment request
  - Clinical secure message

Configure Routing for Incoming Messages from Patients:
Tools > Settings > Messaging > Forwarding
- Can be received by individual recipient / pool designated by the provider (pools supported in 9.1.136 or higher)
C-17 Secure Messaging

- Access to SRS Communicator Reports
- Tools > Settings > Users > Profiles > SRS Communicator
  - Can View Patient Account Info
  - Can View Patient Audit Log
C-12 Preventive Care (a.k.a Patient Reminders)

- Three Steps:
  1. Identify patients who need reminders
  2. Send practice-provided reminder
  3. **Patient Reminder** PowerTab to document in SRS

- Demo:
  - Using **Patient Reminder** PowerTab
  - Document the patient **Preferred Contact Method** if the patient provides one
C-12 Preventive Care (a.k.a Patient Reminders)

- Identify patients who need reminders
  - MU Report Card Drilldown
  - Separate report (Advanced Reporting, from PM, etc.)
  - Existing process for recall/reminders
C-12 Preventive Care (a.k.a Patient Reminders)

- Admin Setting to Identify Reporting Period
  - Tools>Settings>Users>Profiles>Meaningful Use

**Note:** Reminders must be given during the reporting period. This setting is used to identify whether or not the reminders entered in the Patient Reminders power tab should count in the numerator.
C-14 Medication Reconciliation

- The EP who receives a patient from another setting or provider of care:
  - New patient
  - Summary of Care received from another provider (via paper, fax, electronic delivery)
C-14 Medication Reconciliation

- Automating “Transfer Encounter” Checkbox
  - Tools > Settings > Users > Doctor Names > Meaningful Use Admin button > Report Exclusions button

Note: This setting does not affect appointments that have already been scheduled. It will apply to new appointments created after the setting is configured.
C-15 Summary of Care

Transferring a patient out

- The EP who transitions or refers a patient to another setting or provider of care should provide a summary care record

Measure A
- Can be printed

Measure B
- Requires to be sent electronically using direct messaging

Measure C
- Yes/no attestation
- Retain documentation of a Summary of Care Record sent to a provider who had a different EHR
Direct messaging

- Client must be on v9.2.083+
- Must be on SureScripts 10.6 platform
- Providers will need their direct email address entered in SRS
- Submit a support ticket
C-15 Summary of Care

Referral: Nancy Honeyman

Select Referring Provider:

Reason for Referral (required):

Message:

Save & Send
Save & Print
Save*
Cancel*

*Does not count for Meaningful Use
C-15 Summary of Care

- Available Fields:
  - Patient name
  - Referring or transitioning provider's name and office contact information
  - Procedures
  - Encounter diagnosis *(required)*
  - Functional status, including activities of daily living, cognitive and disability status
  - Immunizations
  - Laboratory test results
  - Vital signs
  - Smoking status
  - Demographic information
C-15 Summary of Care

- Available Fields (cont’d):
  - Care plan field, including goals and instructions
  - Care team including the primary care provider of record and any additional known care team members beyond the referring or transitioning provider and the receiving provider
  - Reason for referral
  - Current problem list (EPs may also include historical problems at their discretion)
  - Current medication list (required)
  - Current medication allergy list (required)
C-15 Summary of Care

- Copy of summary of care filed in the ‘Transition of Care Archive’ tab
- Set up messaging forwarding **Tools > Settings > Messaging > Forwarding**
  - Incoming Messages
  - Message failures
- Care Team (Not a required field)
  - Adding Clinical Staff records for Care Team
    - Misc > Data Entry > New
    - SRS Menu Bar - File > New Chart > Clinical Staff Member
M-2 Electronic Notes

- **eNote Power Tab** – Can create structured eNotes in SRS

- **eNote Power Tab** is also used to enter information for the *Summary of Care* measure!
M-2 Electronic Notes

- Can also use existing Word document as electronic note
- **eNote Admin** Tab - Configure which **Tab Names & Document Names** contain progress notes

*eNotes must be text searchable; PDF documents do not count.*
Clinical Quality Measures

- Select 9 CQMs covering ≥ 3 domains using the CQM CDS admin power tab
- If submitting electronically for PQRS and/or MU, will need to be on v9.2.081+
- CQM Resources
  - [CQM Cheat Sheets](#)
  - [CQM Data Value Sets](#)
  - [CQM/CDS Configuration Guide](#) (for clients < v9.2.081)
C-6 Clinical Decision Support Rule

- 5 CDS rules tied to ≥4 CQM
- In place prior to the start of the reporting period
  - Audit Report shows when rules were turned on
- CQM / CDS Admin power tab to set up
Registry Measures

- **C16 – Immunization** Registries Data Submission
  - Immunization consent
  - Responsible party
  - Publicity Code

- **M1 – Syndromic Surveillance**
  - Requires Reason for Visit and Observation (eNote PowerTab)

- **M5 – Report Cancer Cases**
  - (a.k.a. Cancer Registries)

- **M6 – Report Specific Cases**
  - Specialized Registries
  - IRIS (ophthalmology)
Registry Measures – Next Steps

- Identify which registries you are interested in working with
- Find out if public health agency/registry is able to accept data electronically
- Open a Support ticket for each connection
  - Please include contact name and phone number at the registry!
Other “Admin” Measures

- Patient Lists Measure (C11)
  - Run one list for each provider during Reporting Period
- Protect Electronic Health Info Measure (C9)
  - Conduct or review a security risk analysis

Note: These measures must be done every year!
Stage 2 Training Plan

- Admin Training Sessions:
  - Stage 2 Overview
  - Admin Configuration (*this session*)
  - CPOE Admin – Configuration of CPOE module
  - Clinical Quality Measures

- User Training Sessions:
  - Stage 2 User Training
  - SRS Communicator (if using Communicator as portal)
  - CPOE – Radiology Orders / Procedures
  - CPOE – Lab Orders
  - CPOE – Managing Results

Go to [http://srssoft.com/mutraining](http://srssoft.com/mutraining) to register!
Next Steps

- Review workflow and allocate responsibilities
- Register your staff for additional training sessions
- Decide on your three menu measures
  - Selection is limited
  - Registry measures require certain documentation and information to be sent electronically
- Direct messaging set up
- Reach out to account manager
  - Lab interface(s)
  - HL7 interface
- Service facility set up for CPOE
- User permissions for CPOE
Resources

- For additional information, please see:

  Materials attached to this session

  SRS Website:
  http://srssoft.com/meaningful-use

  CMS Stage 2 EHR Incentive Program

  SRS Customer Service Portal Knowledgebase
  http://srssoft.com/csp/login.asp
Q & A