

eCW and Direct - Achieving MU for Transitions of Care (TOC)

Read this tip sheet if you are an eCW user and want to **learn how to set up your EHR** for using P2P and HISP Direct exchange; how to obtain your Direct address; and **how** to achieve the **TOC measures** using P2P and/or Direct.

HOW WILL I SEND TRANSITIONS OF CARE IN eCW?

P2P or Direct Plus

The P2P module in eCW allows you to send/receive CCDs and additional patient documentation (to/from other **eCW users only**) and pull this information directly into your EHR. Using P2P is free.

Direct Plus allows you to communicate to **non-eCW providers** using Direct exchange. There is an annual cost of \$120.00 per organization associated with this option. This cost covers DIRECT accounts for all providers at your organization. Providers create their Direct Plus account and complete the onboarding process. DigiCert is the Certificate Authority used.

HOW DO I SET UP eCW P2P/HISP DIRECT IN MY PRACTICE?

For the eCW Administrator or Super User:

1. Confirm P2P has been activated for your practice. (this is a one-time process for the practice to activate P2P)
2. Ensure appropriate staff have P2P security permissions
3. Go to "eCW P2P Admin" icon located on the Admin Band
4. Identify providers to activate for P2P and a HISP Direct account
 - If provider has not been registered for P2P, click the "Register" link to register them for P2P
(**Note: if only registering provider for P2P, no further action is required. To also register the provider for a HISP Direct account, proceed as follows :**)
 - For registered P2P providers, click the "Edit Settings" link
 - Select the radio button for "eClinicalWorks Direct Plus (Option 2)"
 - Create a HISP DIRECT email address for the provider and verify it's an available email address.
(Suggested naming convention for DIRECT email address is:
firstname.lastname@practiceacronym.eclinicaldirectplus.com)
 - Click "Check Availability" button to confirm this Direct address is available to use/issue.
 - If email address is available, click "Submit" button to complete enrollment.
5. Go to eCW Support Portal and open a ticket requesting HISP Direct accounts for the practice.
(Open New Case -> Service Request -> Services -> Interface -> Direct Messaging/HISP Connection)
6. eCW will send practice "Addendum for HISP Services" and "Direct Messaging Request Form". Complete both documents and return to eCW.
7. The practice "Trusted Agent" identified in the Direct Messaging Request Form will be contacted by eCW to start the identity proofing process with DigiCert. (Note: the DigiCert process takes approximately 4-6 weeks to complete before providers can begin using their HISP Direct accounts.
8. Go to the eCW Support Portal to download the user guides for Activating P2P and Implementing HISP DIRECT.

HOW DO I SEND REFERRALS ELECTRONICALLY TO eCW PROVIDERS USING P2P?

1. From the "T" jelly bean, select:
 - Send P2P Referral/Consult
OR
 - In the Progress Note Treatment section, click Outgoing Referral button
2. Select patient
2. Fill out the fields in eCW "Outgoing Referral" form
3. Click on the eclipse button (...) next to the *PROVIDER* field under "Ref To" section
 - Click drop-down arrow on Provider field and select "P2P Providers" option
 - **Click drop-down arrow on State field and select "DC"**
 - Enter last name to search for the provider
 - P2P network provider directory appears
 - A green "P" icon indicates those providers who are part of your P2P network, allowing you to electronically send referrals to them
4. Click on *ATTACHMENTS* button
 - Attach Medical Summary should be checked
 - Attach CCR/CCD should be checked
 - Select additional information you want to attach such as:
 - Progress Notes
 - Labs
 - X-Rays
 - Patient Documents (incoming faxes or scanned by your staff)
 - Click OK Button
5. Click on *SEND REFERRAL* button

HOW DO I SEND A PATIENT RECORD ELECTRONICALLY TO eCW PROVIDERS USING P2P?

1. From the T jelly bean, select:
 - Send P2P Patient Record
2. Select patient
3. Click on the eclipse button (...) next to the *To:* field to find the provider.
 - Be sure the "All" radio button is checked
 - Be sure the "All Community" option is displayed
 - Click drop-down arrow on State field and select "DC"
 - P2P network provider directory appears
 - A green "P" icon indicates those providers who are part of your P2P network, allowing you to electronically send a patient record to them
4. Click radio button next to the provider's name to select them
5. Enter the Subject and Message you want to send with the patient record
6. Click on *ATTACHMENTS* button
 - Attach Medical Summary should be checked
 - Attach CCR/CCD should be checked
 - Select additional information you want to attach such as:
 - Progress Notes
 - Labs
 - X-Rays

- Patient Documents (incoming faxes or scanned by your staff)
 - Click OK Button
6. Click on *SEND* button

HOW DO I SEND REFERRALS ELECTRONICALLY TO NON-eCW PROVIDERS USING HISP DIRECT?

1. From the T jelly bean, select:
 - Send P2P Referral/ConsultOR
 - In the Progress Note Treatment Section, click Outgoing Referral button
2. Select patient
3. Fill out the fields in eCW "Outgoing Referral" form
4. Click on the eclipse button (...) next to the *PROVIDER* field under "Ref To" section
 - Click drop-down arrow on Provider field and select "P2P Providers" option.
 - An "All Communities" field will appear. Click the drop-down arrow for this field and select "Direct Trust Providers"
 - Click drop-down arrow on State field and select "DC"
 - Enter last name to search for the provider
 - The Direct Trust Provider directory appears
 - A "D" icon indicates those providers who are part of your HISP DIRECT Trust network allowing you to electronically send referrals to them.
5. Click on *ATTACHMENTS* button
 - Attach Medical Summary should be checked
 - Attach CCR/CCD should be checked
 - Select additional information you want to attach such as:
 - Progress Notes
 - Labs
 - X-Rays
 - Patient Documents (incoming faxes or scanned by your staff)
 - Click OK Button
5. Click on *SEND REFERRAL* button

HOW DO I SEND A PATIENT RECORD ELECTRONICALLY TO NON-eCW PROVIDERS USING HISP DIRECT?

1. From the T jelly bean, select:
 - Send P2P Patient Record
2. Select patient
3. Click on the eclipse button (...) next to the "To:" field to find the provider.
 - Be sure the "All" radio button is checked
 - Click on the "All Community" field and select the "DIRECT Trust Providers" option
 - Click drop-down arrow on State field and select "DC"
 - The DIRECT Trust Provider network directory appears
 - A "D" icon indicates those providers who are part of your DIRECT Trust network allowing you to electronically send a patient record to them.
4. Click radio button next to the provider's name to select them.

5. Enter the Subject and Message you want to send with the patient record
6. Click on *ATTACHMENTS* button
 - Attach Medical Summary should be checked
 - Attach CCR/CCD should be checked
 - Select additional information you want to attach such as:
 - Progress Notes
 - Labs
 - X-Rays
 - Patient Documents (incoming faxes or scanned by your staff)
 - Click OK Button
1. Click on *SEND* button

HOW DO I RECEIVE ELECTRONIC REFERRALS USING P2P/DIRECT?

1. If receiving provider is on eCW, the referral goes directly into the Incoming Referral window in the "R" jelly bean and will have "P" icon on the left hand side
2. Click the referral to view the details and attachments and click *CREATE REFERRAL* button. The Incoming Referral screen will appear.
3. The patient name will appear in red (since it has not been matched yet)
 - Click SEL to search and select the matching patient in your database or to create a new patient account
4. Click *OK* to close the referral window and you will be prompted to move the attachments into patient documents.
5. Click *OK* to move attached documents to Patient documents. Documents are saved in the eCW P2P Documents folder
6. Imported documents will have a system generated name. Select document and click "Update" document to change the name as appropriate.

HOW DO I RECEIVE ELECTRONIC PATIENT RECORDS USING P2P/DIRECT?

1. If receiving provider is on eCW, the patient records goes directly into the "T" jelly bean under the P2P Patient Records option.
2. Click the patient record. The patient name will appear in red (since it has not been matched yet)
 - Click "Match Patient" or "Select Patient" button to search and select the matching patient in your database or to create a new patient account
 - Click "Attachments" button to view the attachments associated with this patient record.
3. Click *OK* to close the P2P Patient Record window and you will be prompted to move the attachments into patient documents.
4. Click *OK* to move attached documents to Patient documents. Documents are saved in the eCW P2P Documents folder
5. Imported documents will have a system generated name. Select the document and click "Update" document to change the name as appropriate.

HOW DO I USE ELECTRONIC DATA IN PROGRESS NOTE?

1. When the patient has been scheduled for their visit, use the *CCR* option to import patient details into progress note
2. In the Right Chart Panel, click "DRTL" tab and scroll down to either the "Referrals" section or the "eCW P2P Records" section
3. Select either a "Referral" or the "P2P Patient Record" and click the *CCR* option
 - Review the data and import data into the progress note by using the blue arrows
 - Data that can be imported from the referral includes: Problem List, Allergies, Medications, Social History, Family History, Immunizations, Medical History, Surgical History and Hospitalizations.
4. Reply to the referring provider by clicking the "Respond Arrow" to the left of the P2P icon.

ACHIEVE MU MEASURES FOR TRANSITION OF CARE

To achieve the Transition of Care measure for Meaningful Use, you must configure P2P and/or HISP DIRECT as instructed above and:

- Send a Referral or Patient Record **ELECTRONICALLY** AND
- ATTACH THE CCR/CCD and MEDICAL SUMMARY to the referral or patient record.

All other methods of sending a referral/consult note such as fax or print will not count towards this measure.