

# MedAllies Pilot

## NHIN Direct Clinical Workflow

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### **Use Case 1 and 2: Closed Loop Consultation**

- Primary care provider refers patient to specialist including summary care record
- Specialist sends specialty care information back to referring provider

### **Workflow- Primary care provider refers patient to specialist including summary care record**

#### **Physician interacts with EHR to create information packet for delivery across NHIN Direct**

Within his/her EHR the physician orders a consult and attaches specific information to the request. This requires selecting practice or physician to whom the patient is referred, reason for referral, diagnosis, and urgency

Standard summary data is automatically attached to the referral including: current medications, patient's problem list [ICD 9 codes], allergies, demographic information, insurance information and potentially medical, surgical, family, and social histories

Physician can optionally attach additional other information including: Most recent visit note or visit summary, expectations about specialist follow up, lab results or other reports (e.g. EKG), diagnostic imaging reports, or other data within the EHR

Physician completes the order and the request and the packet is routed to the specialty practice

#### **Information packet crosses NHIN Direct to specialist physician's EHR**

Can be routed to assistant or scheduler in specialists' office

The request with attached information posts to the Scheduler's worklist or task list with appropriate identifier – "Consult Request Please Read Immediately"

Scheduler opens request and checks information including insurance coverage and then contacts the patient to schedule the appointment with the specialist

The Scheduler creates a medical record for the patient in the EHR of the specialists and then posts the packet in the record for later review by the specialist

## **Workflow - Specialist sends summary care information back to referring provider**

### **Physician interacts with EHR to create information packet for delivery across NHIN Direct**

Specialist has a visit with the patient and documents the visit in his/her EHR consistent with normal workflow creating a visit [consult] note and other medical information such as test results

Specialist creates a Referring Physician packet for the referring physician containing a standard dataset that is automatically added that includes: current medications, specialty diagnosis with ICD 9 codes, procedure CPT codes, problem list, and allergies

Specialist can also attach variable documents (information) such as visit note, results, procedures, information about pending labs, tests, studies and specialists' planned follow up with the patient, modifications to histories, etc.

Once the packet is prepared it is transmitted to the primary care physician or his/her office staff (assistants), or nurse

Data is received in the primary physician's office by the assistant.

Documents are pushed to the physician for review by recipient and uploaded into the patient's record once verified and acted on by the physician. if immediate follow up or additional scheduling regarding the PCP is required this can be performed

### **Exceptions**

- Patient's insurance does not cover specialist selected and packet has been released by physician
- Office does not schedule specialty visits but leaves this up to the patient
- If visit has not been scheduled prior: Scheduler can open request, create a new patient in the EHR and upload the demographic and other data to the EHR, creating a new patient record; Scheduler can then contact the patient and schedule a visit and either send a message to the specialist r.e. the referral or [more frequent case] specialist will look at the information prior to the appointment at his/her convenience
- If visit has been scheduled previously, Assistant opens the request and registers the patient within the specialists EHR, creates a new record and uploads all data into the record from the packet; assistant alerts specialist or specialist is not alerted [more frequent case] and reviews the information c/w established workflow Patient is a "no show" for the visit to the specialist and there is a record in the EHR for a patient that has never been seen

## Use Case 3: Hospital Discharge

### Workflow-Hospital sends discharge information to referring provider

At the time of hospital admission in the EHR, the PCP of record is verified with the patient

Hospital care is provided over course of one to several days

The provider entering an order for patient's discharge from the hospital prompts the creation of a discharge information package to be transferred to the PCP of record within the Hospital EHR system

The Discharge information package includes standard automatic data including: medications at discharge, ICD 9 problem list, discharge instructions, procedures performed in the hospital, and allergies

The discharging clinician may also attach variable information from the hospital system such as:, operative notes, path reports, imaging reports, relevant labs, or other results pending results and planned follow up, specialty physicians involved in the patient care, etc.

When the Ward Clerk discharges the patient and logs the patient out of the registration system this triggers the packet to be sent to the PCP's EHR on record in the hospital system. A second physician may also receive the packet if requested by the discharging physician.

A message posts in the PCP's system with the appropriate prompts/urgency to the assistant or to the clinical care manager or both regarding the receipt of the discharge information packet

The recipient uploads the information into the system and the scheduler ensures that the patient is scheduled for a follow up visit with the PCP, and the care manager contacts the patient to review discharge medications and instructions

The PCP is tasked to review the documents by the assistant along with any additional information from the initial patient contact

#### Exception

- PCP on record in the system is incorrect
- There is no PCP of record