ACCURO®
Electronic Medical Records

Phone: 1.866.729.8889
www.AccuroEMR.com

Saskatchewan Interoperability User Guide

EMPOWERING PROVIDERS | CONNECTING PATIENTS

18 King Street East, Suite 1002
Toronto, ON M5C 1C4, Canada

1620 Dickson Avenue, Suite 300
Kelowna, BC V1Y 9Y2, Canada

1260 Hamilton Street, Suite 200
Vancouver, BC V6B 2S8, Canada

Developed by QHR Technologies

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WELCOME TO SK INTEROPERABILITY

As part of improving Saskatchewan's continuity of care across health systems and to provide better access to primary care information, Accuro's SK eHR Interoperability module allows Encounter data to automatically be submitted to eHealth Saskatchewan as well as a notification solution to indicate that new patient information is available in the provincial eHR.

This User Guide outlines:

- How Providers can opt-in to the program
- Setup Steps
- How and what data is extracted from Accuro and submitted to eHealth Saskatchewan
- How notifications are displayed in Accuro.

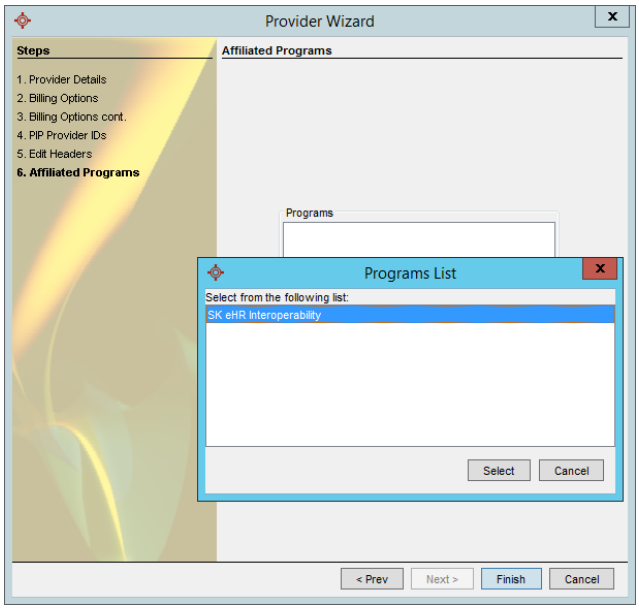
PREREQUISITES

- Have been in contact with eHealth Saskatchewan to be enrolled in the program and have setup completed by QHR.
- Clinic must be using Office Providers for patient information to be submitted. Office Providers are tracked in the Patients section of Accuro.

If you are not currently using Office Providers, patients can be mass updated and assigned to a Provider. For further instruction please locate the Accuro User Guide in Accuro under the Start Menu. Click Help to bring up the Accuro User Guide and search Office Provider Assignment.

SETUP – PROVIDER CONFIGURATION

STEP 1: HOW TO CONFIGURE PROVIDERS



1. Navigate to Provider Management by selecting F2 on your keyboard.
2. Click to highlight the Provider that would like to opt in and select the Configure Button
3. Click the Next button until you have reached Affiliated Programs
4. Click the Add Button and select SK eHR Interoperability program
5. Click the Finish button to Save.

Only data belonging to Providers participating in the SK eHR Interoperability program is submitted to eHealth Saskatchewan.

STEP 2: DOCUMENTATION MAPPING

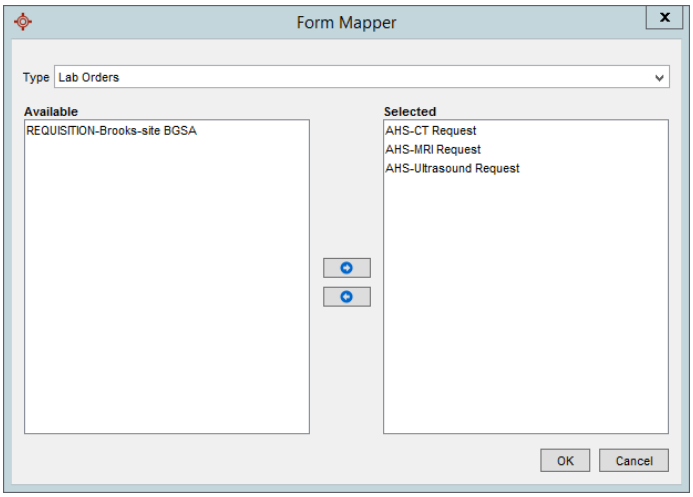
Only forms categorized as a Requisition Form and mapped to an appropriate Form Type are submitted to eHealth Saskatchewan. Lab Orders, Diagnostic Orders, Notes, and Documents must also be configured before they will be submitted.

Mapping Lab Orders

Lab Orders must first be categorized as a Requisition Form before they can be mapped to appropriate Form Type.

1. Open the Form Editor (Accuro Start Menu > Tools > Form Editor)
2. Select an existing Form being used for Lab Orders by the clinic
3. From the Category dropdown, select Requisition Forms
4. Then click Save to save this Form
5. Repeats steps 2 – 4 for all Lab Orders used by the clinic

Next, map the Lab Orders to the appropriate Form Type.



1. Open the Accuro Form Mapper (Accuro Start Menu > Tools > Map Forms)
2. In the Type dropdown, select Lab Orders

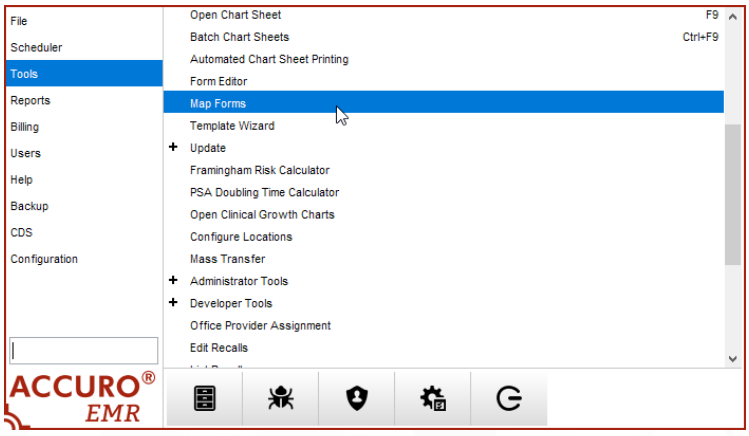
Select the forms within the Available pane and click the button with right pointing arrow to move the form into the Selected pane. Once all the Lab Orders are moved into the Selected Pane, press OK to save.

Mapping Diagnostic Orders

Diagnostic Orders must first be categorized as a Requisition Form before they can be mapped to appropriate Form Type.

1. Open the Form Editor (Accuro Start Menu > Tools > Form Editor)
2. Select an existing Form being used for Diagnostic Orders by the clinic
3. From the Category dropdown, select Requisition Forms
4. Then click Save to save this Form
5. Repeats steps 2 – 4 for all Diagnostic Orders used by the clinic

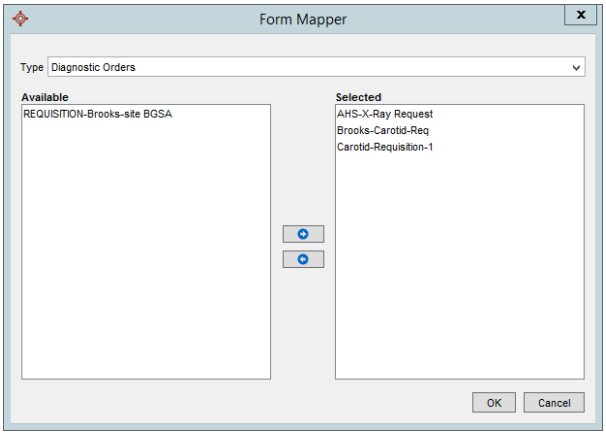
Next, map the Diagnostic Orders to the appropriate Form Type.



1. Open the Accuro Form Mapper (Accuro Start Menu > Tools > Map Forms)

2. In the Type dropdown, select Diagnostic Orders

3. Select the forms within the Available pane and click the button with the right pointing arrow to move the form into the 'Selected' pane.



Once all the Diagnostic Orders are moved into the Selected Pane, press OK to save.

Mapping Note Types

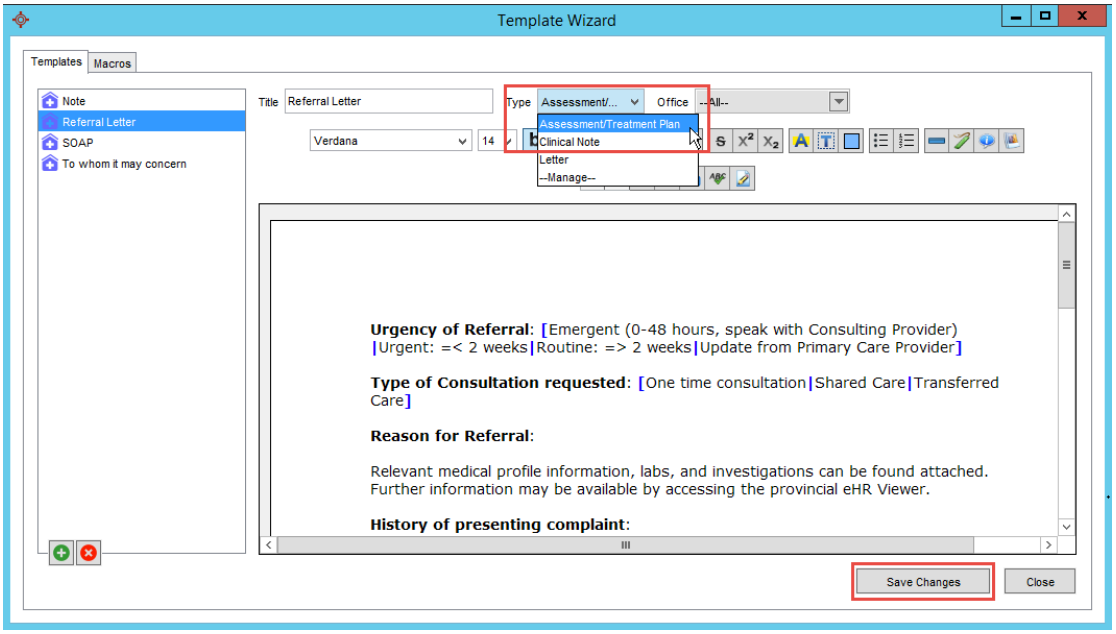
Only Notes associated with the Type Assessment/Treatment Plans are shared with eHealth Saskatchewan. You can elect to default a specific Note to this type to ensure all these notes are submitted, or you can submit for individual notes by manually adjusting the Note type.

Template Wizard

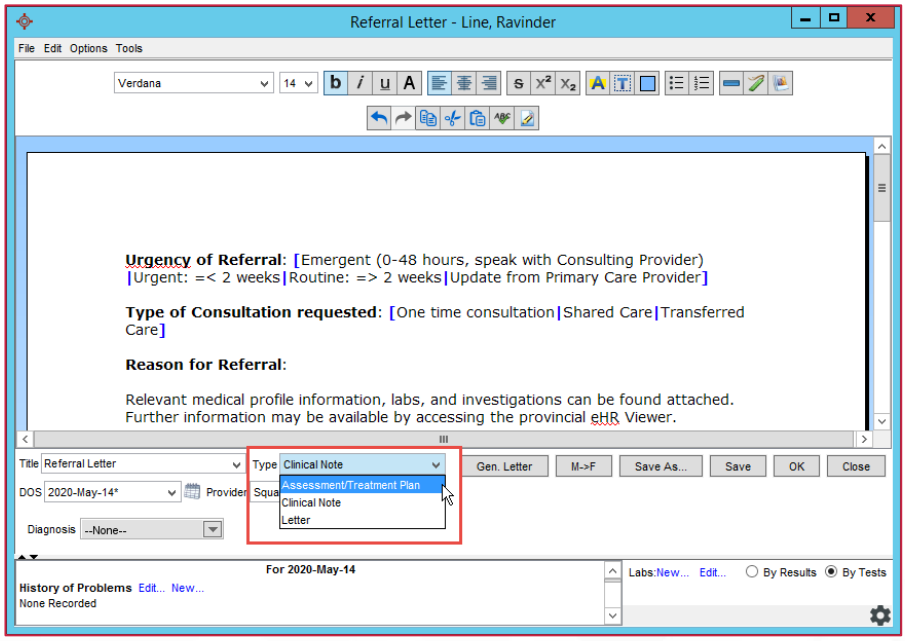
To default a specific Note to this type to ensure all these notes are submitted, notes must be associated with the correct type using the Template Wizard.

1. Open the Template Wizard (Accuro Start Menu > Tools > Template Wizard)
2. Select the Note that should be configured
3. Choose Assessment/Treatment Plan type from the Type dropdown at the top of the Template Wizard window
4. Click Save Changes to save this Template for future use on patient charts

On the Patient's Chart



To submit individual notes by manually adjusting the note Type, when creating an Encounter note for a Patient's chart, select the Type as Assessment/Treatment Plan



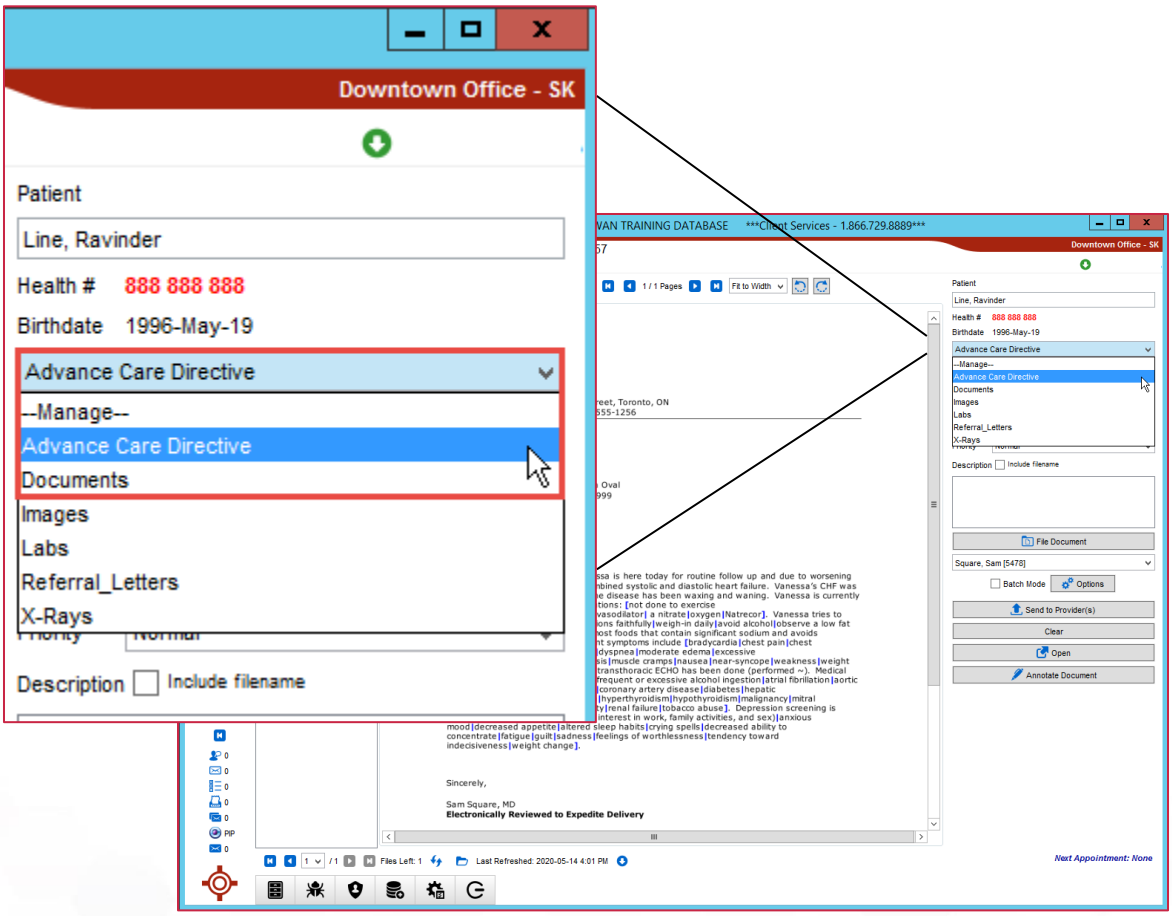
Mapping Document Types

Only Documents associated with the Type Advance Care Directive are shared with eHealth Saskatchewan.

Advance Care Directive

A new Document Type is available when filing scanned or faxed documents: The Advance Care Directive.

The new Type is available in the Document section and must be used when categorizing Advance Care Directive documents.



EXTRACT AND SUBMIT DATA TO EHEALTH SASKATCHWAN

Accuro will automatically extract and send the data you have configured to be sent to eHealth Saskatchewan.

MAPPING: WHAT DATA IS SUBMITTED TO EHEALTH

Data submitted to eHealth Saskatchewan is extracted from the following areas within Accuro:

Patient Demographics

Patient data submitted to eHealth Saskatchewan is extracted from the Patients section.

Medications

Prescription data submitted to eHealth Saskatchewan is extracted from the Medications tab/Prescriptions Medical History Band in the EMR section.

Allergies

Allergies and intolerance data submitted to eHealth Saskatchewan is extracted from the Allergies medical history band in the EMR section.

Provider Management

Provider data submitted to eHealth Saskatchewan is extracted from Provider Management. (Accuro Start Menu > Tools > Configure Providers)

Provider data is submitted to eHealth Saskatchewan when:

- Provider is associated with a User (Manage Security / User Management)
- Provider is active
- Provider is opted into the SK eHR Interoperability program

Office Management - Service Delivery Location

Service delivery location data submitted to eHealth Saskatchewan is extracted from the office details. (Accuro Start Menu > Users > Manage Security > Offices)

Appointment Encounter
Encounter data submitted to eHealth Saskatchewan is extracted from appointment details in the Scheduler section. Group appointment data is also submitted to eHealth Saskatchewan.

Appointment's associated Procedure Codes and Diagnosis Codes are extracted and submitted to eHealth Saskatchewan if they exist. The values are extracted from Claim Details.

History of Problems - Conditions
Conditions data submitted to eHealth Saskatchewan is extracted from the History of Problems medical band in the EMR section.

1. In addition to criteria listed in The Appointment is **not** marked as No Show

Valid Chart Item and Active Chart Items, Condition data is submitted to eHealth Saskatchewan when:

- History of Problem entry Negative property is unchecked

Lifestyle
Lifestyle data submitted to eHealth Saskatchewan is extracted from the Lifestyle medical band in the EMR section.

Lab Results Observations
Observation data submitted to eHealth Saskatchewan is extracted from Lab Tests entries.

2. In addition to criteria listed in The Appointment is **not** marked as No Show

Valid Chart Item, Observation data is submitted to eHealth Saskatchewan when:

- Lab Test name is either Physical History (Optimed) or Physical History (Child) (Optimed)
- Observation is Height, Weight and Blood Pressure
- Lab Test is not masked

Clinical Notes - Clinical Assessment / Treatment Plan

Clinical assessment and treatment plan data submitted to eHealth Saskatchewan is extracted from Notes of type Assessment/Treatment Plan.

3. In addition to criteria listed in The Appointment is **not** marked as No Show

Valid Chart Item, Clinical Assessment/Treatment Plan data is submitted to eHealth Saskatchewan when:

- Note is listed as Assessment/Treatment Plan Type

Forms - Lab Orders

Lab Orders data submitted to eHealth Saskatchewan is shared on or after forms identified to as Lab Orders. (See Mapping Lab Orders for details)

4. In addition to criteria listed in The Appointment is **not** marked as No Show

Valid Chart Item, Lab Order data is submitted to eHealth Saskatchewan when:

- Form is mapped to type Lab Orders (Map Form)
    - Form is categorized as a Requisition Form (Form Editor)

Note: Only some data, like a Requisition Date, is submitted to eHealth Saskatchewan. Data stored within the form itself is not shared.

Forms - Diagnostic Orders

Diagnostic Orders data submitted to eHealth Saskatchewan is shared from forms identified as Diagnostic Orders. (See Mapping Diagnostic Orders for details)

5. In addition to criteria listed in The Appointment is **not** marked as No Show

Valid Chart Item, Diagnostic Order data is submitted to eHealth Saskatchewan when:

- Form is mapped to type Diagnostic Orders (Map Form)
    - Form is categorized as a Requisition Form (Form Editor)

Note: Only some data, like a Requisition Date, is submitted to eHealth Saskatchewan. Data stored within the form itself is not shared.

Immunizations
Immunization data submitted to eHealth Saskatchewan is extracted the from Immunization Schedule medical band in the EMR section.

Surgical/Medical History
Surgical History data submitted to eHealth Saskatchewan is extracted from the Surgical/Medical History band in the EMR section.

Documents - Advance Directives
Advance directives data submitted to eHealth Saskatchewan is extracted from Documents that are listed as the Type: Advance Care Directive.

UNDERSTANDING ENCOUNTER SHARING AND RULES FOR SUBMISSION

Data is submitted to eHealth Saskatchewan when an appointment with a patient in Accuro takes places. The following are processes in, and out, of Accuro that the clinic will need to adopt as part of their successful participation in submission to eHealth Saskatchewan.

Note: When appointments and chart items are modified subsequent of being shared with eHealth Saskatchewan, an update is automatically submitted to reflect the change and to allow eHealth Saskatchewan to maintain data integrity in their repository.

Associate Chart Items with an Appointment
Chart items must be associated with an appointment before they are submitted to eHealth Saskatchewan. They are associated with an appointment based on the chart item's Date of Service or the chart item's alternative date when the Date of Service was not entered.

When a chart item's alternative date is used to create the association to an appointment, only chart items created within a *24h window* (since the appointment's date/time), or before Patient's next appointment, whichever comes first, is associated with the appointment. Chart items with alternative date falling outside the 24h window is associated with patient's next scheduled appointment.

The following diagrams show two appointments and three chart items. All chart items are **missing** Date of Service and their alternative date (e.g. created date) is used when creating the association to an appointment.

Appointment: APT1

- Appointment date/time: 2018-Sep-22, 1:30pm
- APT 1's 48h window is between A and B in the diagram

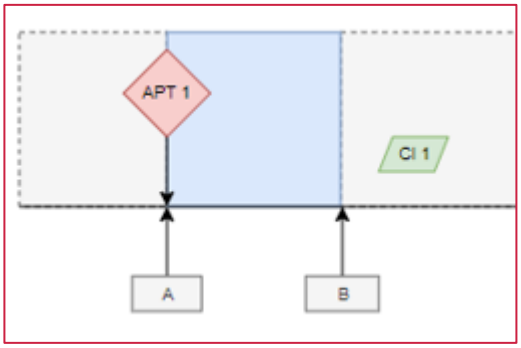


Chart item: CI 1

- Created Date: Nov-18 4:28pm
- CI 1 is "orphaned" and will never be associated with an appointment because alternative date falls outside "APT 1" time window (A-B).
- **This will not be submitted**

Appointment: APT2

- Appointment date/time: Feb-25, 11:30am
- APT 2's 48h window is between C and D

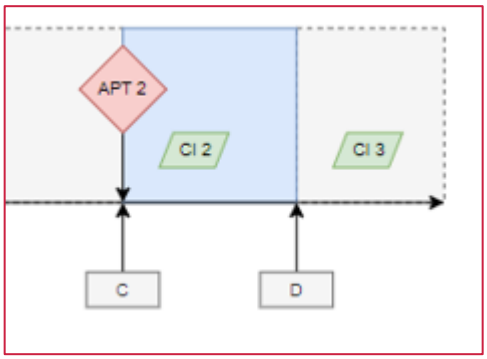


Chart Item: CI 2

- Created Date: Feb-26 9:09am
- CI 2 is associated with APT 2 because alternative date falls inside the 48h window (C-D).
- **This will be submitted**

Chart Item: CI 3

- Created Date: Feb-28 10:10am
- CI 3 is "orphaned" and will never be associated with an appointment because alternative date falls outside APT2's 48h window (D).
- **This will not be submitted**

Valid Appointment

Appointments must meet all the following criteria to be submitted to eHealth Saskatchewan:

6. The Appointment is **not** masked
7. The Provider the appointment is booked with is opted-in to the SK eHR Interoperability program
8. The Appointment is **not** marked as No Show

Valid Chart Item

Chart items must meet all the following criteria to be submitted to eHealth Saskatchewan:

- The Chart Item is associated with a Valid Appointment
- The Chart Item is **not** Masked
- The Chart Item is **not** flagged as Do not Share
- The Chart Item belongs to Provider opted-in to the SK eHR Interoperability program
    - If the Chart Item does not have an owner, it is shared with Saskatchewan eHealth if the associated appointment's Provider is opted-in.

Active Chart Items

Some of the Chart Items have status fields available. The status fields must contain the following to be considered Active and submitted to eHealth Saskatchewan:

Chart item Type	Definition of Active
Medication	The Status field is listed as: • Active
Allergies	The Clinical Status field contains one of the following: • Confirmed or verified • Doubt raised • Suspect
History of Problems	The Status field is listed as: • Active

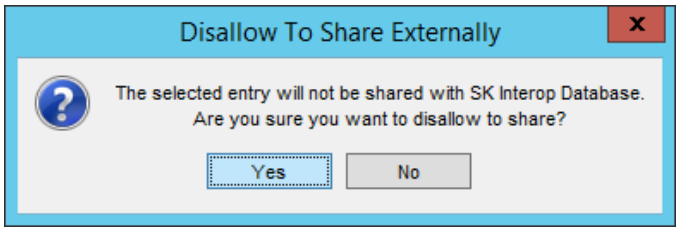
Do Not Share – Understanding you Patients' Participation rights

It is important to understand your patient's rights in sharing or not sharing data with Saskatchewan eHealth. Although you have seen the benefits of this initiative, your patients may not want their information shared. If a patient requests that an item not be shared, you can flag individual chart items to accommodate the request.

The option Do not Share is available in the pop-up menu when right clicking chart items. Example:

1. Right click on an item that is not to be shared, such as a prescription.
2. Select Do not Share from the menu

3. The Provider must confirm that chart items is not to be submitted to eHealth Saskatchewan



4. An icon (globe with padlock) is displayed on chart items flagged as Do not Share

5. The Do not Share flag can be removed by right-clicking the chart item and then selecting Share
6. Repeat the above steps for every item the patient does not want shared.

HISTORICAL DATA SUBMISSION

Data is submitted to eHealth Saskatchewan as soon as Accuro is relaunched after the SK Interop module has been turned on at the clinic.

A Patient's first eligible appointment to be submitted is referred to as the Initial Encounter.

Data submitted to eHealth Saskatchewan for a Patient's Initial Encounter must meet the conditions described in the Valid Appointment, Valid Chart Items, and Active Chart Items.

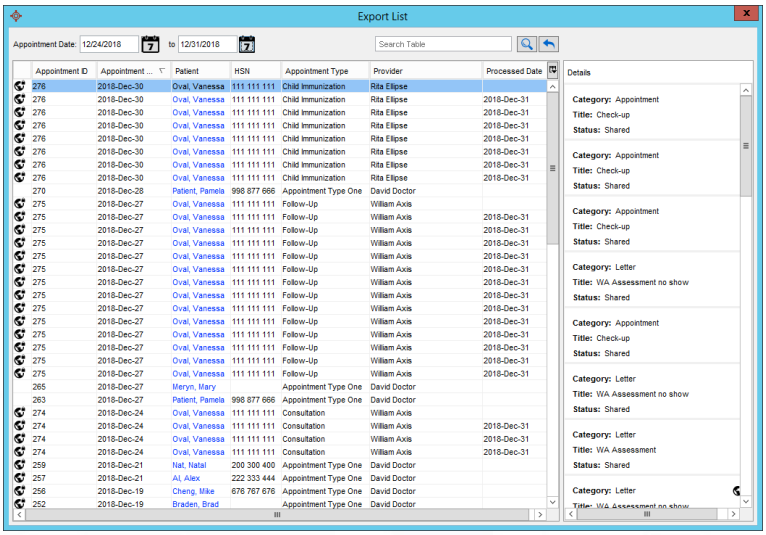
In addition, eligible *historical* chart items are submitted as part of the Initial Encounter. Only historical data of the following chart items types is part of Initial Encounter:

- Medication
- Allergies
- History of Problems
- Lifestyle
- Surgical/Medical History
- Documents (Advance Directives)

Note: Historical chart items must still meet the conditions described in the Valid Chart Items and Active Chart Items to be eligible for submission.

EXPORT LIST

The Export List allows user to view what data was submitted or excluded from the submission to eHealth Saskatchewan. It displays appointments and associated chart item details on a visit by visit basis.



Feature Access

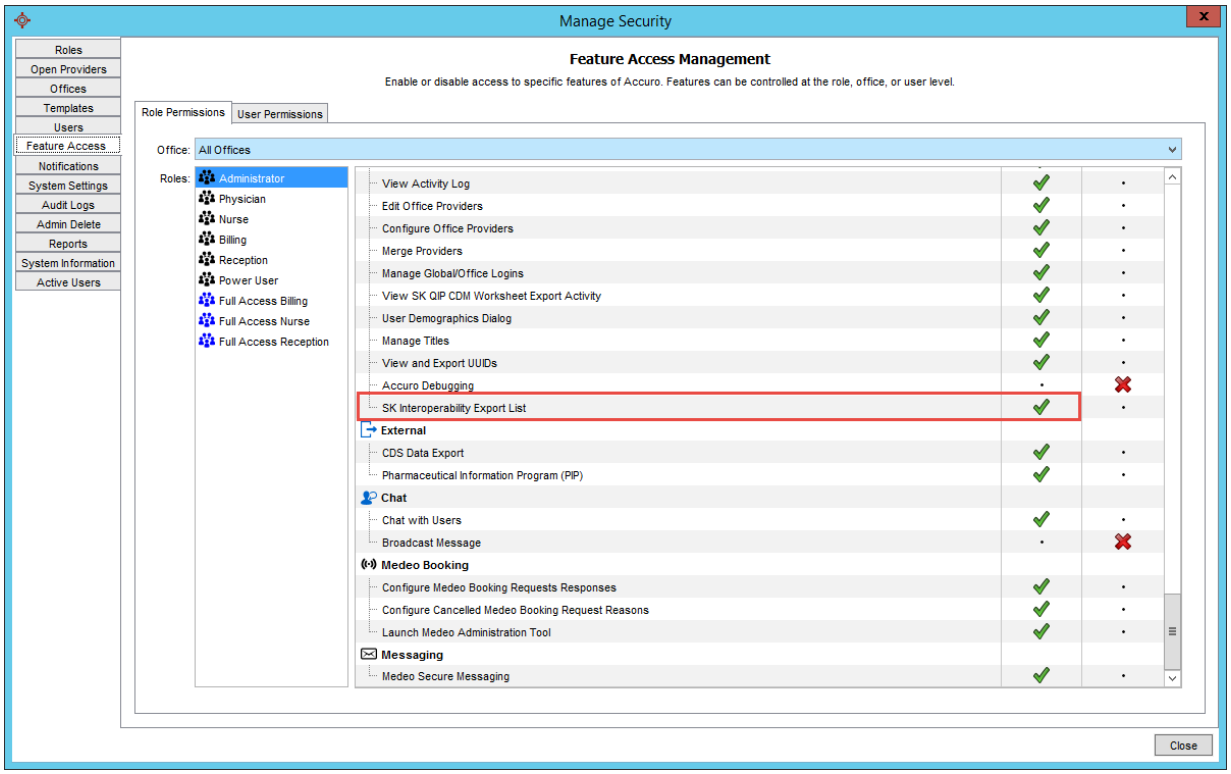
A System Administrator must allow access for each User or Role to use the SK Interoperability Export List (Accuro Start Menu > Users > Manage Security > Feature Access)

If you would like the access to be the same **per role**:

1. Select the Role Permissions tab.
2. Click to highlight the Role you would like to configure.
3. Check in the SK Interoperability Export List.

If you would like the access to be the same **per user**:

1. Select the User Permissions tab.
2. Select the User you would like to configure from the dropdown.
3. Check in the SK Interoperability Export List.



Launch the Export List

Export List can be accessed via Accuro Start Menu > Tools > Export List

Select a row in the Export List to display an appointment's associated chart items and details: Some chart items might not be shared with eHealth Saskatchewan for the following reasons:

Reason	Description
Provider not opted in	The chart item belongs to a Provider that is not opted into the SK eHR Interoperability program
Patient disallowed to share	The chart item is flagged as Do not Share
Masked	The chart item is masked.
Document Type is not Advance Care Directive	The Document is not categorized as Advance Care Directive
Letter type is not Assessment Treatment Plan	The Note is not categorized as Assessment Treatment Plan
Appointment is no longer valid	Appointment is made invalid subsequent to eHealth Saskatchewan submission (e.g. marked as no show or deleted).
Marked as negative	Applicable for History of Problems, Lifestyle, and Surgical history entries. The entry (of the above types) is marked as Negative.
Chart item was transferred to another patient	The chart item is transferred to a different Patient subsequent to eHealth Saskatchewan submission.
Removed from EMR	chart items associated with the appointment is deleted subsequent to eHealth Saskatchewan submission.
File size to large	Chart item (e.g. Advance Directive) details is larger than 1024kb.

Note: Chart items might be excluded for multiple reason's, but only one reason is listed in the Export List.

NOTIFICATIONS AND REPORTING

The eHealth Saskatchewan Interoperability module is enabling clinical information to flow from Accuro to the provincial eHR. Accuro will also notify Providers that information is available for a Patient within their circle of care. By doing so, this will allow providers to access the appropriate clinical information at the right time to support informed clinical decision making.

The following notifications types are received by Accuro:

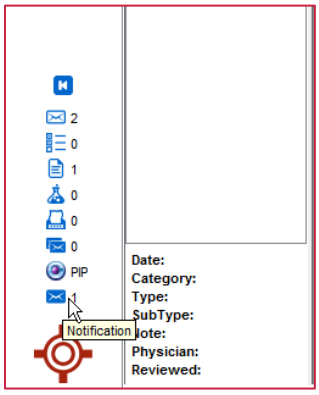
- Community EMR Visit with Other Care Providers
- Acute Care Admission
- Acute Care Discharge
- Patient Death
- Medical Imaging Report
- Consults/Referrals
- Patient Profile
- Progress Notes
- Operative/Procedure Reports
- Discharge & Transfer
- Notification Patient List Review Reminder

Notifications are displayed in the Home section and within the Virtual Chart tab in the EMR section.

NEW NOTIFICATIONS

The notification area in Accuro is displaying Unreviewed Notifications sent by eHealth Saskatchewan:

Double-click on the envelop icon to navigate to the Home section and display received Notifications.

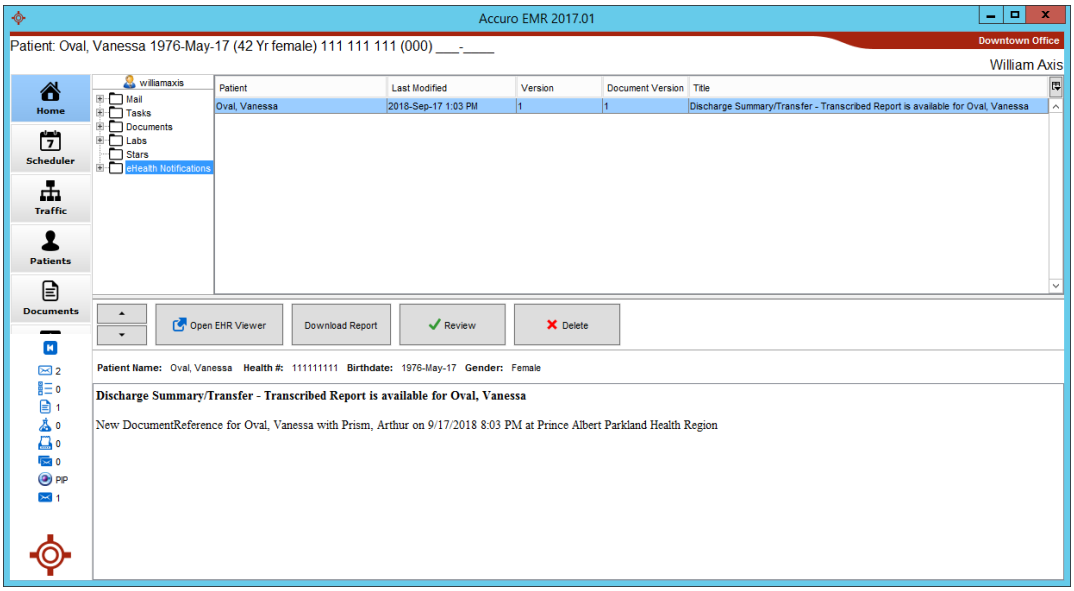


Home

Notifications received from eHealth Saskatchewan are displayed in the eHealth Notification folder within the Home section.

Note: Unread notifications are displayed in bold text.

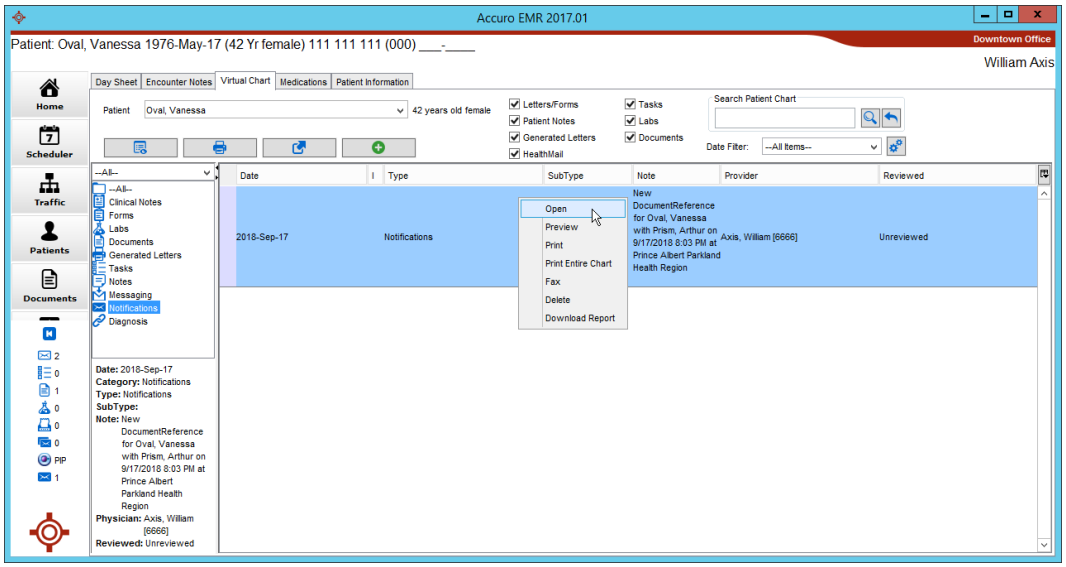
Click on a Notification to access details and actions that can be performed.



Action	Description
Open EHR Viewer	Button to allow user to launch the EHR Viewer and view associated Report.
Download Report	Button to allow user to download and store associated Report from eHealth Saskatchewan to Accuro.
Review	Button to allow User to flag the Notification as reviewed. Note: The Notification will be removed from the Home section but is still available within the Virtual Chart tab in the EMR section
Delete	Button to allow User to delete the Notification. Note: The Notification will be removed from both the Home section and EMR section.

EMR

Notifications matched to a Patient are displayed in the Home section as well as in the Virtual Chart tab within the EMR section.



Right-click on a Notification to access actions that can be performed.

Action	Description
Open	Allows user to launch the EHR Viewer and view associated Report.
Preview	Allows user to display the Notification details. Note: From the Preview window a user can flag the Notification as Reviewed and create Follow Up Requests.
Print	Allows user to print the Notification details.
Print Entire Chart	Existing functionality
Fax	Allows user to fax the Notification details.
Delete	Allows User to delete the Notification. Note: The Notification will be removed from both the Home section and EMR section.
Download Report	Allows user to download and store associated Report from eHealth Saskatchewan to Accuro.

DOWNLOAD REPORT

Accuro is determining based on information in the Notification message received from eHealth Saskatchewan if the referred Report can be downloaded automatically, or to allow Provider to download the report on-demand.

Download Automatically

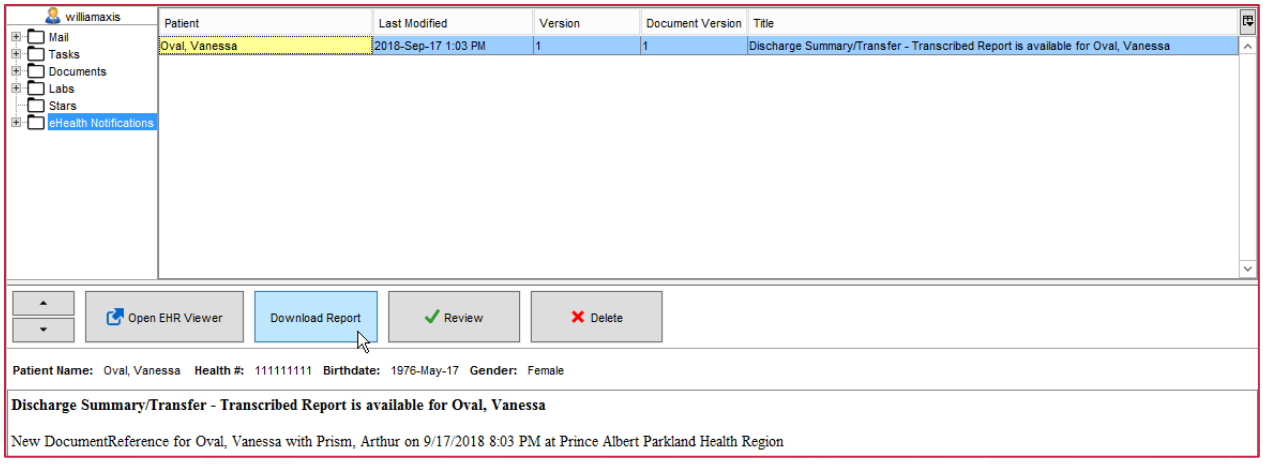
Accuro is downloading Reports (referred to in Notifications) automatically when the Notification is received by a Provider that is identified on the document as the primary provider or CC'd on the result in the provincial EHR (Listed Provider).

The downloaded Report is available in the Documents link in the Home section for Provider to review.

Note: The Notification is not displayed the Home section and the EMR section when a Report is downloaded automatically.

Download On-Demand

When the Notification is received by a Provider that is not a Listed Provider (i.e. not identified on the document as the primary provider, or CC'd on the result in the provincial EHR), the Report can be downloaded on-demand from the Notification:



PATIENT ROSTER

Accuro is automatically submitting a list of Providers and their associated Patients to eHealth Saskatchewan to support patient-based notification routing.

Provider details are extracted from Accuro when the following criteria is met:

- Provider is Active
- Provider is assigned to a User
- Be listed as the Office Provider for at least one valid patient

For each provider meeting the criteria above, a list of patients is extracted when the following criteria is met:

- Patient has a primary provider declared (Office Provider)
- Patient Status is Active (Had an Appointment in the last Two Years)
- Patient has seen the primary provider within the past 24 months.