



California Medical Systems

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REAL WORLD TESTING PLAN 2023

GENERAL INFORMATION

Plan Report ID Number: Calmed_RWT_2023_1

Developer Name: California Medical Systems

Product Name(s): Practice Expert

Version Number(s): 2018

Certified Health IT Product List (CHPL) ID(s): 15.04.04.1190.Prac.18.00.1.181222

Developer Real World Testing Page URL: cal-med.com/onc.html

JUSTIFICATION FOR REAL WORLD TESTING APPROACH

California Medical System's Practice Expert v. 2018 is marketed for small to medium sized practices. The Real World Testing will focus on scenarios that occur in small to medium sized practices, encompassing single and multiple provider offices. All modules and criteria that share the purpose of Clinical Data Sharing will be tested. Those criteria include: § 170.315(b)(1) Transitions of Care, § 170.315(b)(2) Clinical Information Reconciliation and Incorporation, § 170.315(b)(6) Data Export, § 170.315(e)(1) View, Download, and Transmit to 3rd Party, and § 170.315(h)(1) Direct Project.

STANDARDS UPDATES (INCLUDING STANDARDS VERSION

ADVANCEMENT PROCESS (SVAP) AND UNITED STATES CORE DATA FOR INTEROPERABILITY (USCDI))

Standard (and version): N/A

Update certification criteria and associated product: N/A

Health IT Module CHPL ID: N/A

Method used for standard update: N/A

Date of ONC ACB notification: N/A

Date of customer notification (SVAP only): N/A

Conformance measure: N/A

USCDI updated certification criteria (and USCDI version): N/A

Summaries

Description Summary

| Criteria | Title | Description | |
|----------------|---|-------------------|--|
| §170.315(b)(1) | Transitions of Care | (i)(A) | Send Transitions of Care via Direct Edge messages. |
| | | (i)(B) | Receive Transitions of Care via Direct Edge messages. |
| §170.315(b)(2) | Clinical Information Reconciliation and Incorporation | (2)(i) (2)(ii) | Reconcile and incorporate a CCDA formatted file, matching the patient if in the database already. |
| §170.315(b)(6) | Data Export | (ii) | Create a CCDA summary export file. |
| §170.315(e)(1) | View, Download, and Transmit to 3 rd Party | (i)(A)(2) | View patient health summary via the Patient Portal using a CCDA template. |
| | | (i)(B)(2) | Download patient health summary via the Patient Portal using a CCDA template. |
| | | (i)(C)(1) | Transmit patient health summary to 3 rd party via the Patient Portal using a CCDA template. |
| §170.315(h)(1) | Direct Project | 1(i) 1(ii) | Send and receive patient health information using Direct. |

Justification Summary

California Medical Systems has a Patient Portal that the patient can access their data on for patients that want access to their clinical care data directly. The base EMR allows the provider to both access the clinical data, share it with other providers, receive and incorporate clinical data, and export clinical data for the patient. The measurements/metrics selected will demonstrate the ability for the provider to send data to another provider via the Direct protocol in a CCDA format, as well as receive and reconcile this data. It will also be demonstrated how the patient can interact with their data in order to view, download, or transmit their health data. These metrics will be shown both from the provider's POV and the patient's POV (via the Patient Portal).

Expected Outcomes Summary

The Real World Testing will show that Practice Expert conforms to the following certification criteria: § 170.315(b)(1) Transitions of Care, § 170.315(b)(2) Clinical Information Reconciliation and Incorporation, § 170.315(b)(6) Data Export, § 170.315(e)(1) View, Download, and Transmit to 3rd Party, and § 170.315(h)(1) Direct Project.

REAL WORLD TESTING PLAN ONE

| CRITERIA | METRIC | METHOD | JUSTIFICATION | EXPECTED OUTCOME |
|---|--|--|---|--|
| 170.315(b)(1) Transitions of Care 170.315(h)(1) Direct Project | <ul style="list-style-type: none"> > Demonstration of creation of a CCDA encounter with transmission to another provider via Direct with a record being displayed in the Doctor Dashboard Messaging Window. > Demonstration of the ability to receive a CCDA via Direct into the Doctor Dashboard Messaging Window. | During the RWT period, the number of CCDAs generated and sent will be collected and documented with any that error out being reported as well. | Illustration of the capability to send and receive CCDAs for the purpose of transition of care via Direct. Database tables will be used to confirm from/to. | <ul style="list-style-type: none"> > The EHR database logs and the Doctor Dashboard Messaging Window will show that a CCDA was generated and sent from the provider's Direct Address and to the next provider's Direct Address. > The EHR database logs and the Doctor Dashboard Messaging Window will show that a CCDA was received from the provider's Direct Address and to the active provider's Direct Address. |
| 170.315(b)(2) Clinical Information Reconciliation and Incorporation | Demonstration of the ability to reconcile and import the problems, medications, and medication allergies reconciliation from the data contained in a CCDA. | During the RWT Period, the number of reconciliations will be reported along with any errors. | Illustration of the capability to incorporate and reconcile problems, medications, and medication allergies originating from a CCDA document. | Documentation in the EHR will show that the data from a CCDA was reconciled and incorporated into a current patient note. |
| 170.315(b)(6) Data export | Demonstration of the system to create a set of CCDA files on the local computer for all of a subset of patients. | During the RWT a success/error rate will be generated. | Illustration of the capability to generate a set files in CCDA format on demand of all or a subset of patients. | A full set of files either for all or a subset of patients will be on a drive locally of the creator of the CCDA files. |
| 170.315(e)(1) View, download, and transmit to 3rd party. | <ul style="list-style-type: none"> > View a patient's health information from the Production Patient Portal > Create a CCDA available to a patient in the Production Patient Portal and download it locally. > Create a CCDA available to a patient in the Production Patient Portal and send it to a 3rd party. | During the RWT Period, the number of portal accounts vs the number of VDT's that take place will be reported. | Illustration of a patient's ability to view, download, and transmit their health information via the Production Patient Portal. | <ul style="list-style-type: none"> > Documentation in the Patient Portal Logs will support that a patient viewed their health information > Documentation in the Patient Portal Logs will support that a patient created a CCDA in the production Patient Portal. > Documentation in the Patient Portal Logs will support that patient has sent a CCDA in the production Patient Portal. |

Care Setting

California Medical Systems markets to small and medium sized clinics, solely for ambulatory care.

Relied Upon Software

California Medical System's Practice Expert v. 2018 requires a subscription to PhiMail Direct Server, which is facilitated upon by California Medical Systems. This additional software is required for 170.315(b)(1) Transitions of Care, 170.315(h)(1) Direct Project, and 170.315(e)(1) View, download, and transmit to 3rd party.

Key Milestones

| | |
|--|-----------------------|
| Client Recruitment | 12/1/2023 – 2/28/2023 |
| Scheduling/Coordination with clients on time frame to conduct Real World Testing | 1/1/2023 – 3/31/2023 |
| Conduct Real World Testing | 5/1/2023 – 8/1/2023 |
| Parse Results | 8/1/2023 – 8/31/2023 |
| Conduct 2 nd attempt for Real World Testing in the case of anomalies or issues. | 9/1/2023 – 11/1/2023 |
| Prepare Final Results | 11/1/2023 – 1/30/2024 |

Attestation

This Real World Testing plan is complete with all required elements, including measures that address all certification criteria and care settings. All information in this plan is up to date and fully addresses the health IT developer's Real World Testing requirements.

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