



HIE Success Process

“DIY” Process and Checklist

Step 1 Obtain customer organization information: (Complete Customer Worksheet)

1. Provider name and address information.
2. Point of Contact information.

Step 2 Complete customer questionnaire:

1. Determine existing EHR.
 - a. Identify current IT/EHR system(s) environment.
2. What HIE capabilities exist in provider’s HIT environment.
 - a. Other systems or interfaces (Immunizations, labs, etc.) and capability.
3. What form(s) of exchange do systems (EHR) support? (focus on Direct messaging)
 - a. If Direct enabled, obtain provider Direct email address(s)
4. Run MU provider report and obtain relevant metrics.

Step 3 Obtain Customer Roadmap relationship list. (Complete Provider List Spreadsheet - Tab 2)

1. Obtain referral/trading partner organization names.
 - a. Gather at a minimum of practice/facility name or provider name, specialty, phone numbers.
2. Prioritize Providers in list (high value MU exchanges first (hospitals, larger clinics, etc.)
 - a. Help customer get to MU goals as soon as possible
3. Try to obtain email address or fax number.

Step 4 CH Staff look up EHR in CH EHR List and CHPL: (<http://oncchpl.force.com/ehrcert/Search>)

1. From provider questionnaire determine CEHRT Certification number if applicable.
 - a. Other information (such as Direct implementation if possible).
2. Lookup provide in CH EHR List (richness of information will evolve over time).

Step 5 CH Staff research Providers on Roadmap (Supplement information on Provider List Spreadsheet - Tab 2)

1. Do internet search of provider and obtain information not gathered by Customer



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2. Look for Website addresses
3. Other URLs containing provider information (Online provider directories and yellow pages)
4. Fax number, alternative email addresses etc.

Step 6 Outreach to each providers on customer roadmap (Execute Steps in Provider List Spreadsheet - Tab 1):

1. If email available, send email form, 2 Day response wait, then escalates to next outreach step).
2. If fax number available, send fax form , 2 Day response wait then escalate to next outreach step).
3. Contact by phone.
 - a. Execute initial call script.
 - b. Goal is to obtain contact info for EHR/MU lead if participating in the EHR Incentive program.

Step 7 Contact EHR/MU Lead on customer roadmap:

1. Obtain relevant HIE information (Execute EHR/MU Scripts).
2. Obtain Direct address and other HIE information such as use of hospital systems for access to patient information, community portal use, etc,
 - a. Determine interest in obtaining standalone Direct solution if not working towards MU.

Step 9 Complete HIE Roadmap Document and Analysis.

1. Roadmap List of connections completed.
2. Projections for MU HIE metrics. (need Dr. Sullivan's input here)
3. Determine time frame for follow-up and next steps for customer.

Step 10 Maintain customer relationship.

1. Send monthly HIE Newsletter.
2. Advertise Q&A webinars.
3. Follow-up service to update HIE Roadmap at periodic intervals.