BOWlink Technologies

Community e-Connect: eReferral Gateway User Guide

TECHNICAL SUPPORT DOCUMENTATION

Contents

User Guide

Introduction

The Community e-Connect (CeC) system enables bi-directional, electronic communication between clinical Electronic Medical Records (EMRs) and community-based organizations (CBOs). The CeC system allows users to “close the loop” on referrals—ensuring that the referral arrives at the community-based organization and that information about the services provided at that organization and patient progress relative to the referral are returned to the referring health care provider.

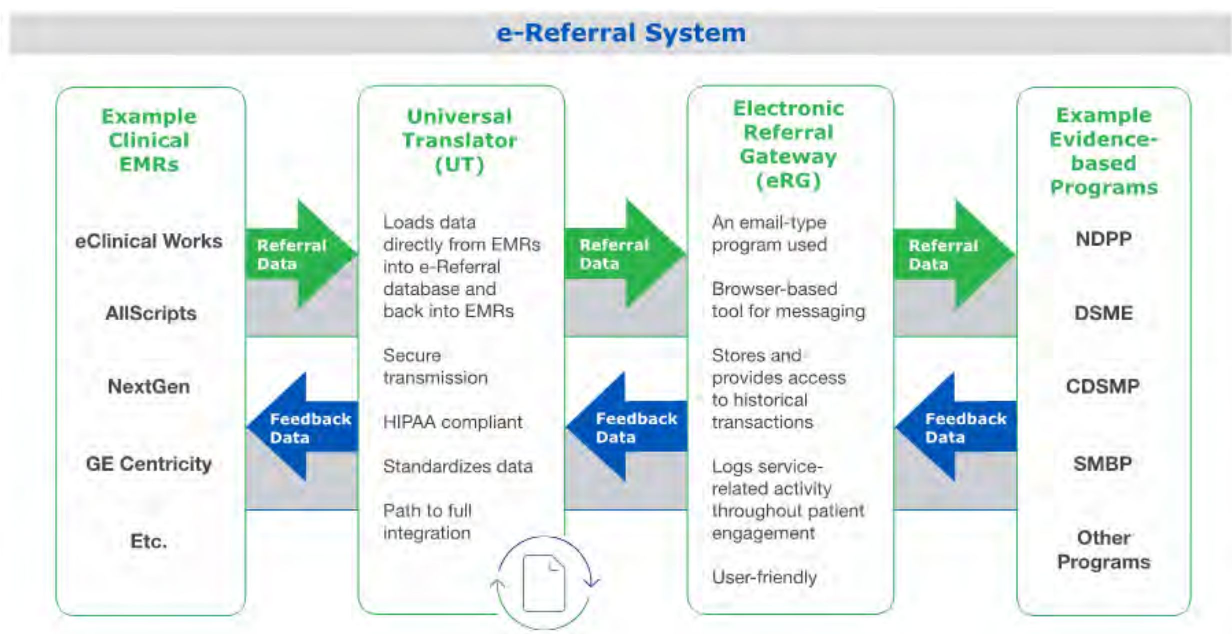


Figure 1: eReferral System (Community e-Connect)

The CeC System is designed to bridge the gap between healthcare providers and their community partners by creating a formal connection between the two at critical junctures – the referral handoffs and communication on patient progress.

Designed to integrate with a clinical site’s EMR, the CeC system enables clinical providers to send electronic referrals directly from their EMR systems to a wide variety of community partners that offer evidence-based programs in the community. The community partner, after engaging the patient and providing services, will provide feedback reports to the healthcare provider via the e-Referral System. The feedback reports are posted directly to the patient’s chart in the EMR system automatically.

The CeC System also offers a browser-based interface for processing referrals which is referred to as the eReferral Gateway (eRG). The eRG may be used in lieu of the EMR system at the clinical organization and is also used by the community partner for receiving referrals and creating feedback reports. This document describes the features and functionality of the eRG and to support testing and use.

The eReferral Gateway (eRG)

The eReferral Gateway (eRG) is a browser-based tool for processing referrals electronically. The eRG functions very much like email, with an inbox for received transactions, a sent items box for outbound transactions, and other functions for managing referrals on a day-to-day basis. This guide describes the process for receiving referrals and sending feedback reports via the eRG.

Logging into the eReferral Gateway

The system administrator must provide you with the URL to access the system via a web browser, as well as a username and password. The recommended browser for the eRG is Google Chrome. To access the system, proceed as follows.

1. After entering the URL, the log in page will appear as shown below.

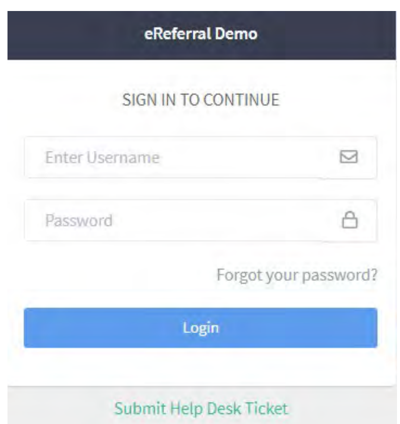


Figure 2: Login screen

NOTE: After successfully logging into the system THE FIRST TIME, the user will be provided with the MEDALLIES END USER AGREEMENT (see appendix I). MedAllies is the vendor that provides the direct messaging connectivity between the healthcare provider EMR system and the CeC system. All CeC users are required to acknowledge that they understand their obligations (as described in the agreement) to safely and securely use information provided to them via the MedAllies network. After reviewing and acknowledging the form (check box in lower left corner), the user will be provided access to the system.

2. After successfully entering your username and password, the eRG homepage will open, as shown below. The PROFILE icon is shown at the far right of the page as shown below.

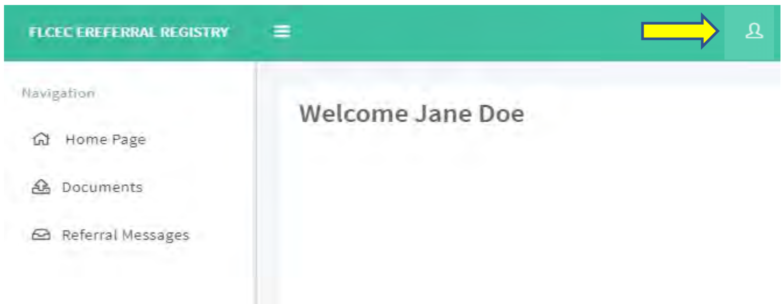


Figure 3: eRG homepage – PROFILE icon

3. After clicking the PROFILE icon, three options will be displayed as shown below.

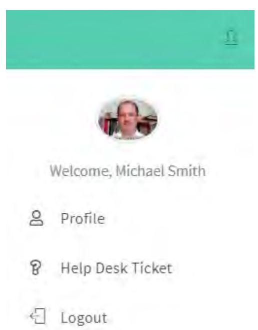


Figure 4: eRG homepage – PROFILE drop down list

4. At this point, you may access your PROFILE, submit a HELP DESK TICKET, or LOGOUT.

Modifying Your Profile Details

After clicking on PROFILE, the profile form will be displayed as shown below. Your profile has data elements and parameters that influence how you interact with the system and how the system interacts with you. You may modify any details of your profile. Click SAVE DETAILS in the lower right corner when finished.

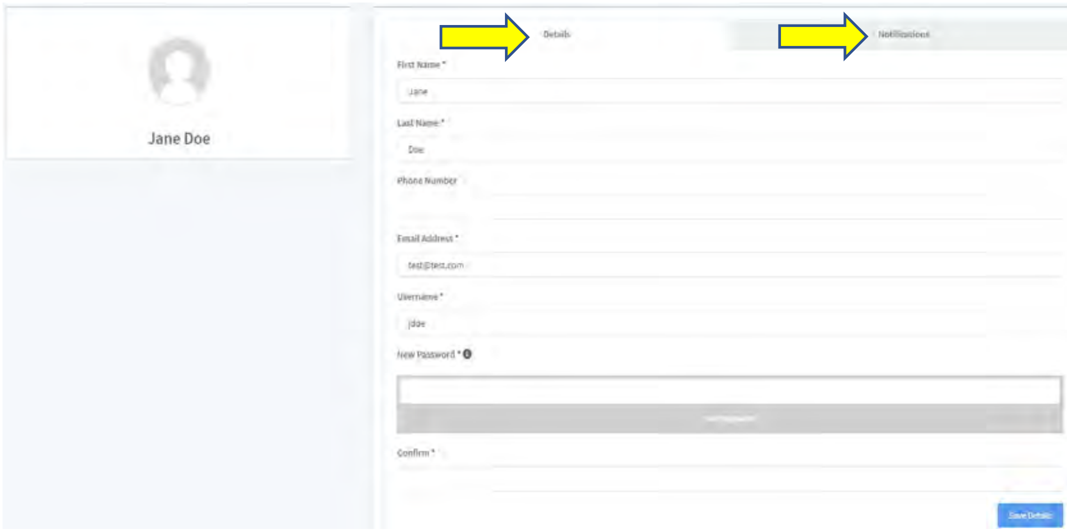


Figure 5: My Profile – Details & Notifications

Profile Details	
Image	An image of the user for use on the system.
First name/Last name	The name used on user reports as required.
Phone number	The phone number used to contact the user.
email address	Where emails generated by the system will be sent when relevant to the user (see notifications section below).
User name	The value used when logging into the system (typically first initial/last name)
Password	Provides the ability for the user to change their password.

Modifying your Profile - Notifications

Each user has the ability to control whether or not they are notified when activity occurs on the system that triggers an email alert. For the CeC system, notifications are made when documents and announcements are made. After accessing your PROFILE, click on NOTIFICATIONS as shown in the figure below. Document and Announcement notifications will be listed. Check off the circumstances where you would want to be notified via the email address specified.

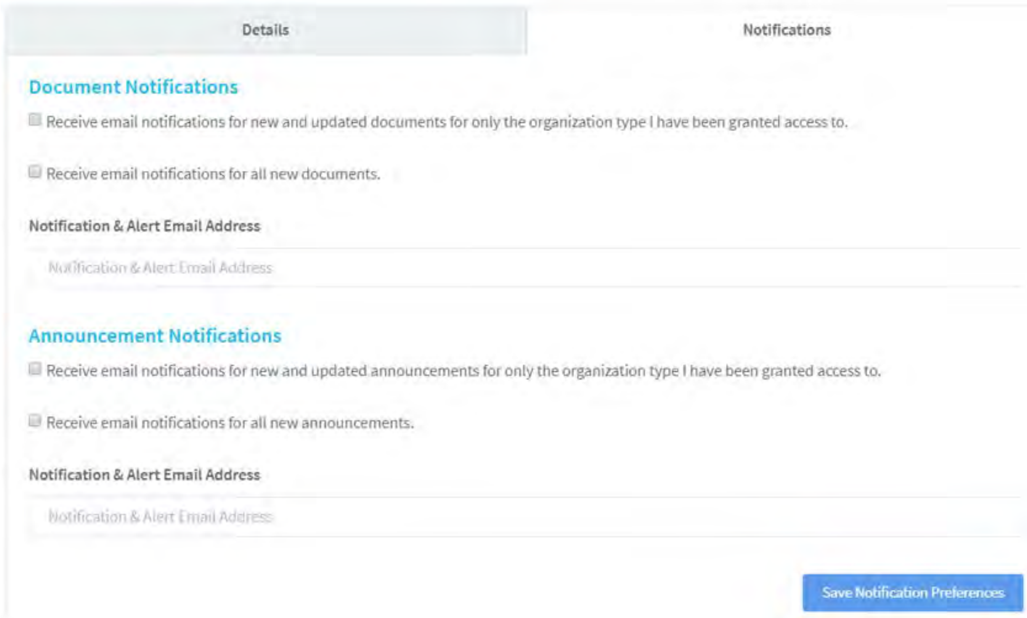


Figure 6: Notifications

Submitting a Help Desk Ticket

If you encounter an issue with the CeC system that you cannot resolve, submit a help desk ticket. After clicking on help desk ticket from the dropdown menu, the form shown below will be displayed. Completing the form will submit a help desk ticket to the help desk and you will be contacted to address your issue. Complete the form as described below and click SUBMIT HELP TICKET to submit the ticket to the help desk

Figure 7: Help Desk Ticket

Help Desk Ticket Details	
Urgency	Is the problem low, medium or high urgency?
Select module	Which module are you having an issue with?
Describe the problem	Enter a narrative description of the issue.
Name/Organization/Phone/ email address	Provide your name, organization, phone number and email address
Preferred contact method	email or phone

Log out

When done with your session, you should logout of the eRG. After clicking LOGOUT, you will be returned to the login page as shown in figure 2 above.

eRG Modules Overview

The eRG is a modular system with several features to support you. The system modules are shown on the left side of the main landing page and in the figure below:

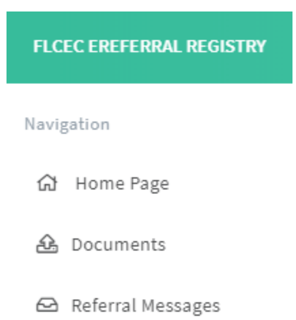


Figure 8: eRG System Modules

Home Page

Click this option to return to the home page from any other page in the eRG. By taking this step, any unsaved activity will be lost, and the system will be reset to continue any other activity.

Documents

The Documents module is used to store and make available documents that will help users during their day-to-day use of the system. The document folder structure as well as the documents themselves are typically created by the system sponsor and/or the system administrator. Suggestions for documents to be stored in the system can be submitted to the help desk, but typically include this User Guide, workflow documents and FAQs.

When you first click the DOCUMENTS tab, the Document Search function is shown as seen in the figure below. Users are authorized to a PUBLIC folder where all general use documents can be found. Users are also given access to an organization specific folder for accessing documents specific to their organization.

You can enter search criteria including document title, description, folder/subfolder, uploaded/modified by, or you can enter from/to date ranges. Alternatively, you can click on the folders listed on the left side of the page to review documents stored in each folder.

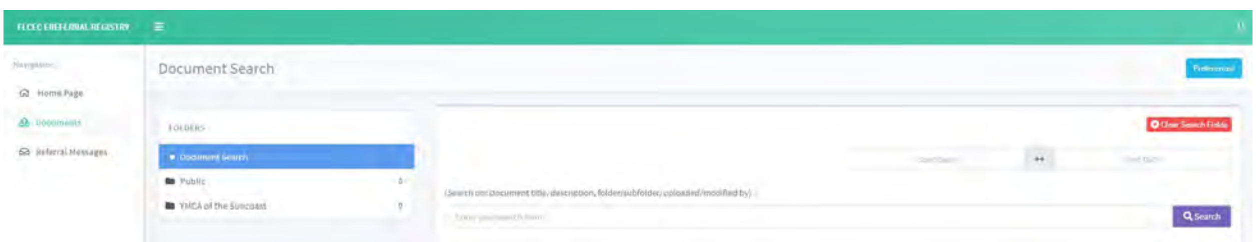


Figure 9: Document Search

Referral and Feedback Messages

The REFERRAL MESSAGES tab is where you can view, create and manage referrals and feedback reports. In the typical system model, the clinical organization will create referrals and send them to the community-based organization, who will create feedback reports and send them to the clinical partner. The figure below shows the major features of this form.

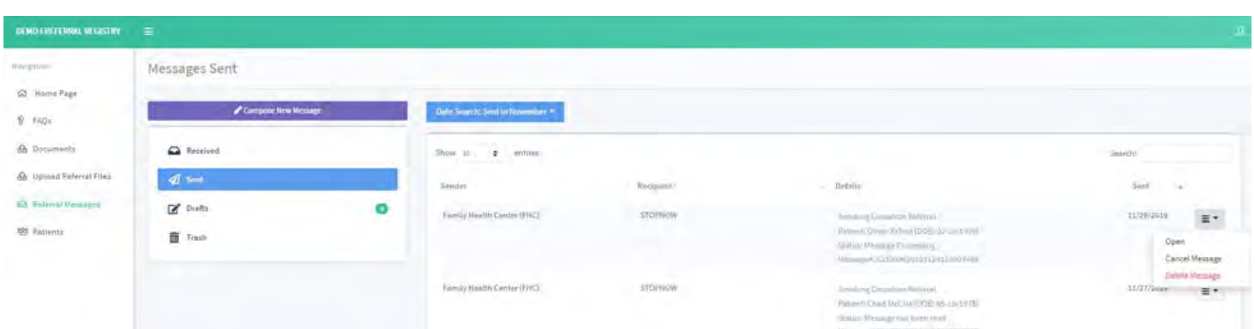


Figure 10: Referral Messages

1. MESSAGES RECEIVED

The MESSAGES RECEIVED page is accessed by clicking the REFERRAL MESSAGES tab on the left side of the main landing page and then selecting RECEIVED from the middle left of that page. The process for reviewing and acting on MESSAGES RECEIVED is reviewed in the next section.

2. MESSAGES SENT

The MESSAGES SENT page is accessed by clicking the REFERRAL MESSAGES tab on the left side of the main landing page and then selecting SENT from the middle left of that page. The process for creating feedback reports from community-based organizations and sending them is reviewed in the next section.

3. DRAFTS

The DRAFTS page is accessed by clicking the REFERRAL MESSAGES tab on the left side of the main landing page and then selecting DRAFTS from the middle left of the that page. DRAFTS are messages that weren’t sent because they are incomplete or for some other reason. The user can go to the DRAFTS section, open the message, complete it as required and send it.

4. TRASH

The TRASH page is accessed by clicking the REFERRAL MESSAGES tab on the left side of the main landing page and then selecting TRASH from the middle left of the that page. Messages can be sent to TRASH from the SENT, RECEIVED or DRAFTS pages and is primarily used to remove messages that are no longer needed. Messages can be reviewed in TRASH and can be restored to the original pages (SENT, RECEIVED or DRAFTS) if needed.

REFERRAL MESSAGES Feature Summary:

The functionality available in the CeC system across the RECEIVED, SENT, DRAFT and TRASH pages is consistent and is reviewed below.

Feature	Function
Date Search	Allows user to restrict which messages are displayed based on date range.
Search	Allows the user to enter text to filter which messages are displayed.
Received	Provides a list of messages received. For a CBO, this will typically be referrals.

Feature	Function
Sent	Provides a list of messages sent. For a CBO, this will typically be feedback reports.
Open	A given referral message can be opened by the user to review message details.
Cancel	A given message can be CANCELLED (removed from the CeC system) if the message hasn't been delivered to the target organization. If CANCEL is selected, the message is no longer available in the CeC system.
Delete Message	If a given message has already been processed through the CeC system (i.e. delivered to the destination), it can be DELETED by the user. If DELETED, the message is placed in the TRASH bin where it may be recovered. This function is most typically used to manage the volume of messages in the SENT items box.

Patients

The Patients tab is where you can view and manage patient referrals associated with your organization. Once a patient record is created, feedback reports can be posted to that patient's record in the eRG. The figure below lists the major features of this form.

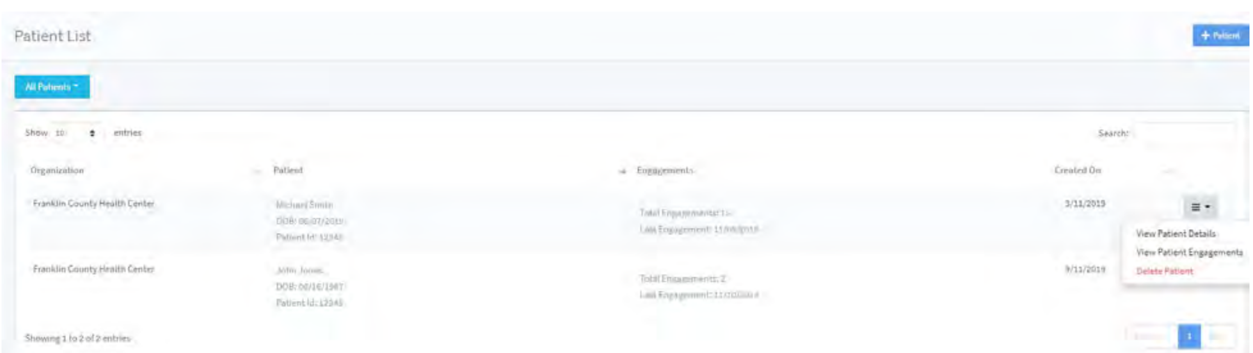


Figure 13: Patient List

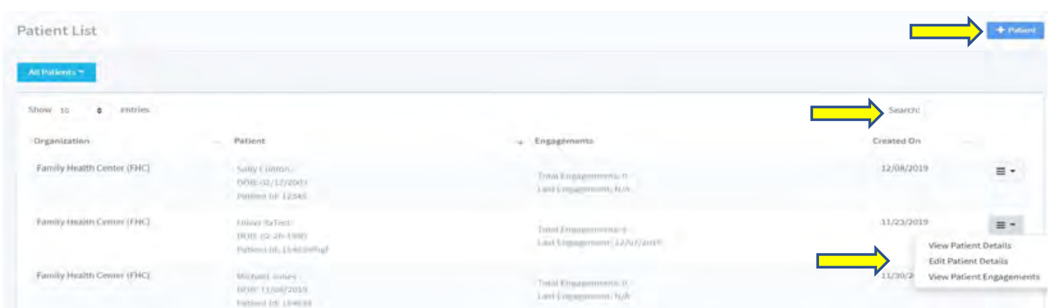
Feature	Function
+ Patient	Allows the user to add a new patient to the Community e-Connect System.

Feature	Function
All Patients/Date Search	Allows user to restrict which messages are displayed based on date range.
Search	Allows the user to enter text to filter which patients are displayed.
View Patient Details	Allows the user to view and/or edit the patient record.
Delete Patient	Allows the user to delete the patient record.

Finding an Existing Patient in the eRG

Before creating a referral for a patient in the CeC System, you must first verify that the patient does/does not already exist in the CeC system. To determine if a patient exists in the CeC system, proceed as follows.

1. Click on PATIENTS from the left side of the main landing page.
2. The PATIENTS LIST will be displayed as shown in the figure below.



3.

Figure 14: Patient List Options

4. You may use the SEARCH option to see if the patient already exists in the CeC system. You may search by name or preferably, patient ID (MRN).
5. When you find a patient record that you believe to be the patient you are engaging, display patient details using the VIEW PATIENT DETAILS option and verify DOB or other contact information.
6. After viewing patient details, click the BACK button to return to the Patients List.
7. If you confirm that the patient of interest is already in the CeC system, you may perform any of the following tasks:
   a. View patient details

b. Edit patient details

c. View patient engagements (see prior referrals and/or feedback reports)

d. Add a new patient

e. Exit the Patient List

8. If the patient isn't found, you may create a new patient by following the steps in the next section.

Processing a Received Referral

When a referral is sent to the CBO, CBO staff will open the referral and engage the patient or client as specified in the agreed upon workflow between the clinical and community partners.

To review a received referral, proceed as follows:

1. Log into the eRG and click REFERRAL MESSAGES, followed by RECEIVED messages as shown below.

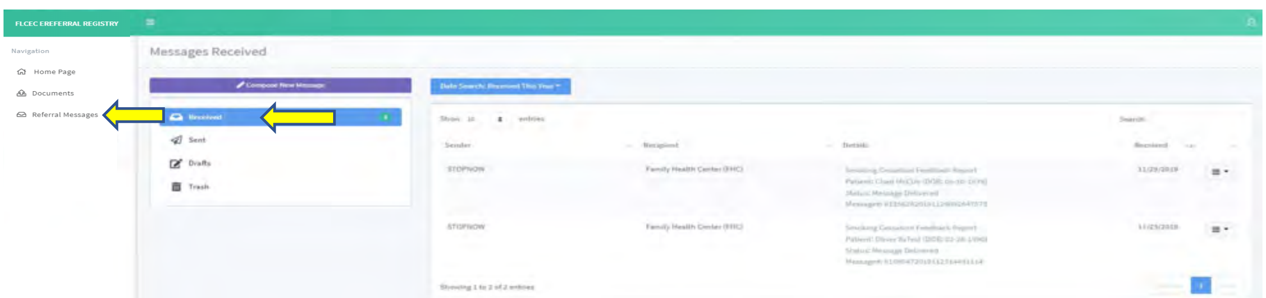


Figure 11: Received Messages

2. RECEIVED messages will be displayed as shown below. Note that any messages that haven't been viewed will be highlighted BLUE as shown below. At this point, you have the following options:
    a. Change the date range used to search for referrals
    b. Enter search criteria to find a specific referral
    c. Open a given referral
    d. Delete the referral (Send to TRASH bin)

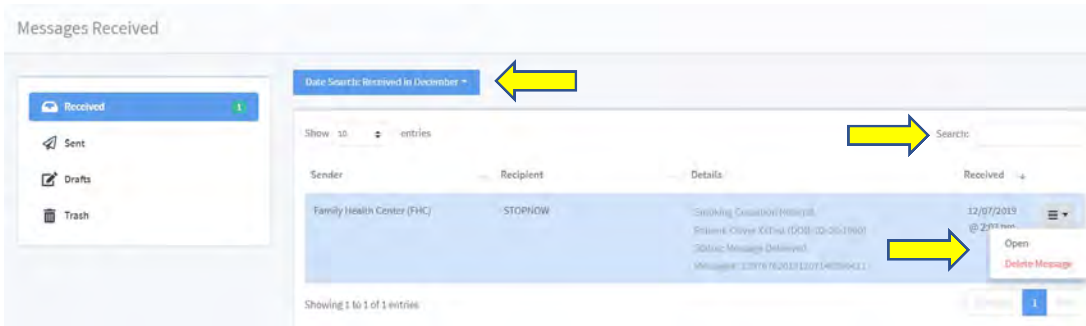


Figure 12: Received Messages Options

3. Once the referral of interest is found, click OPEN to display the details of the referral. The following page is displayed. At this point, you have the following options:
   a. Go BACK to the RECEIVED messages page (click on BACK).
   b. Create a REPLY MESSAGE (feedback report) (click + CREATE A REPLY MESSAGE)

      NOTE: This option will not appear if the referral is in a CLOSED status.
   c. PRINT the referral.
   d. Open and/or print an attachment (if provided in the referral)
   e. Enter NOTES (click on MESSAGE NOTES)
   f. Review related reply messages (feedback reports) (click on RELATED REPLY MESSAGES)

      NOTE: This option will not appear if no reply messages (feedback reports) have been sent.

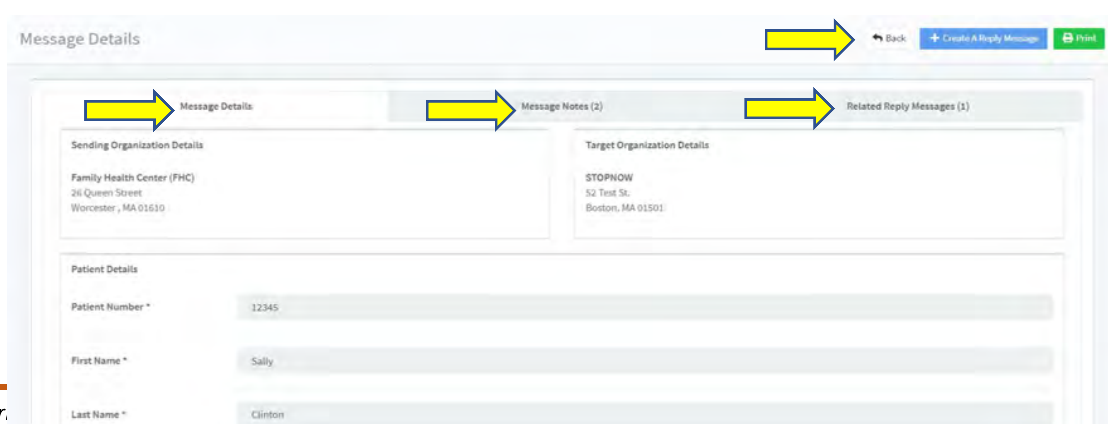


Figure 13: Message Details

4. You may view or download an attachment if one is provided with the referral message. Scroll to the bottom of the page. If an attachment is provided, you'll see it as shown in the figure below. Click VIEW ATTACHMENT or DOWNLOAD ATTACHMENT as required.

Figure 14: Viewing Attachments

Adding NOTES to a Referral

The patient engagement process can be quite lengthy, especially if the patient enrolls in a program that lasts several weeks or months. Throughout this process, CBO staff have the option of capturing activities associated with the patient through the MESSAGE NOTES feature.

1. After displaying a referral, click on MESSAGE NOTES to capture local activity associated with the patient engagement. Please note that NOTES only are accessible by the CBO for tracking patient activity associated with this specific referral. The NOTES are *not* part of the referral feedback report. From this page, you have the following options:
    a. Return to message details (click MESSAGE DETAILS)
    b. Go BACK to the MESSAGES RECEIVED (click BACK)
    c. Create a feedback report (click on + CREATE A REPLY MESSAGE)
    d. Create a new note (click on + NEW NOTE)

e. Print (print the Referral (including notes))

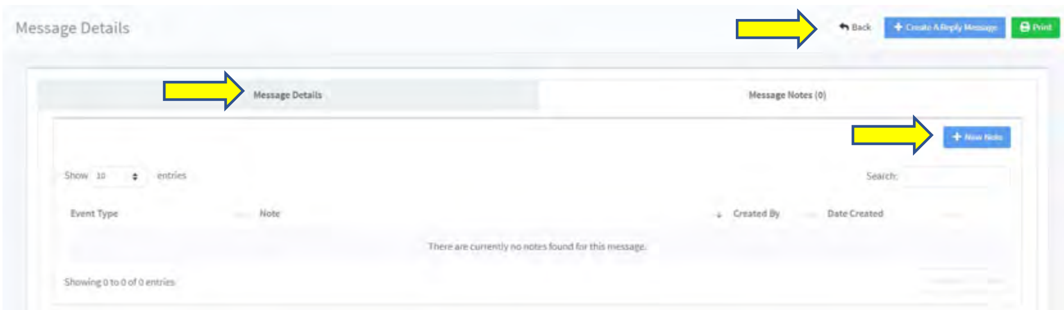


Figure 15: Message Details

5. Click on + NEW NOTE to add a note. The following form appears.

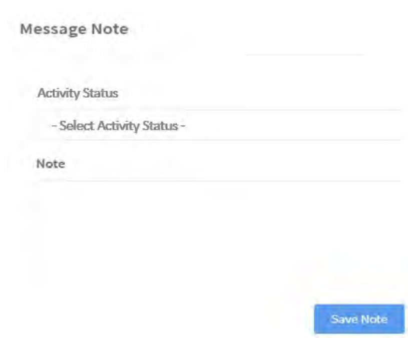


Figure 16: Notes

6. Click the drop-down list for ACTIVITY STATUS and select the relevant activity (e.g. appointment scheduled, patient enrolled, etc.). Note that the available activity status choices may vary based on your CeC system configuration. Also, activity status choices used for a given referral type may vary based on the agreed upon workflow.

7. Add notes as required and click SAVE NOTE. The note, including activity status, created by, and date created will be listed as shown below.

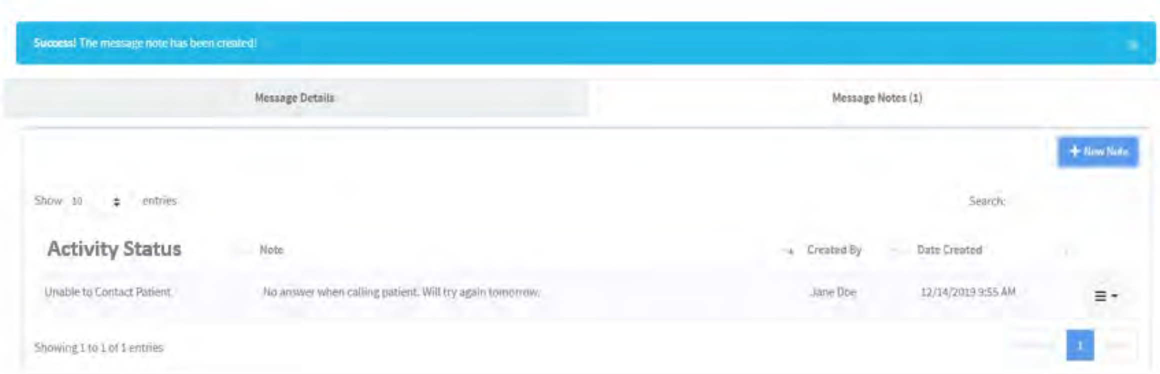


Figure 17: Message Notes Summary

8. NOTES can be added to the patient record throughout the engagement process. Notes can be referenced and reviewed by any CBO staff that have access to the eRG.

Sending a Feedback Report via the eRG

After the healthcare provider sends a referral to the CBO, the CBO will provide one or multiple feedback reports to the clinical organization based upon their previously agreed upon workflow. NOTE: The clinical and community partners must have previously agreed on the timing and content of feedback reports as part of their workflow development.

1. Click on REFERRAL MESSAGES on the left side of the Main Landing Page and then click RECEIVED. The RECEIVED box will be displayed. It may or may not contain previously received messages depending on the date range selected and whether there was referral activity.

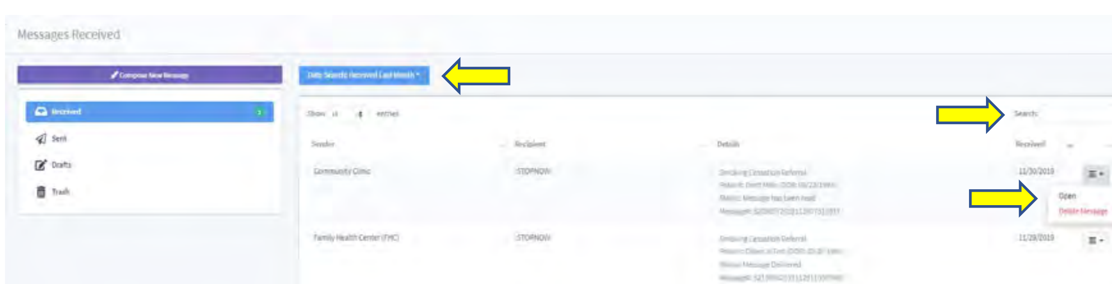


Figure 18: Received messages

2. To find the referral message of interest, you can a) modify the date range and/or b) enter information such as patient name or patient ID to search for the referral as shown in the figure above.
3. Once the correct referral is found, click OPEN. The following page will be displayed. To create a reply message (feedback report), click on CREATE A REPLY MESSAGE as shown below.

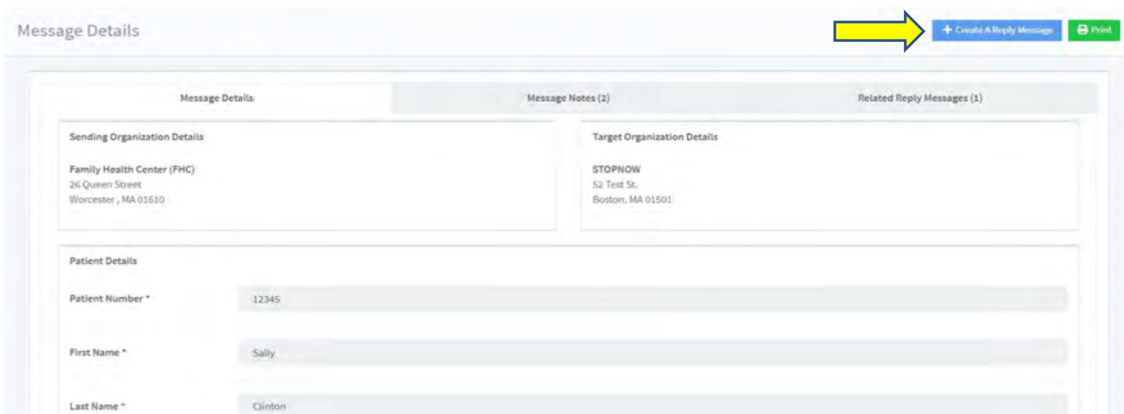


Figure 19: Create a Reply Message

4. Patient Details and Patient Address sections of the feedback report will be *read only* and will be populated with information from the original referral as shown below.

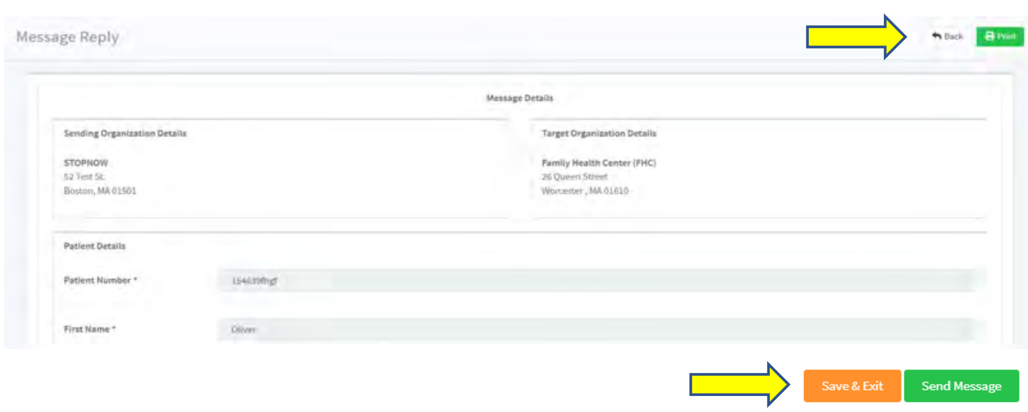


Figure 20: Create a Reply Message

5. You should scroll down to the FEEDBACK REPORT DETAILS section and complete all fields. Key considerations when creating and sending a feedback report include:

- Referral Status will be OPEN or CLOSED. If OPEN, subsequent feedback reports will be allowed. If CLOSED, no subsequent feedback reports will be allowed.
- Activity Status – You should select the most appropriate status for this feedback report based on the agreed workflow between healthcare provider and community partner. Examples include:
  - Unable to contact patient
  - Patient contacted – interested
  - Patient contacted – not interested
  - Appointment scheduled
  - Patient enrolled
  - Service update
  - Patient completed program
  - Program in progress
  - Patient did not complete
  - Patient no show
- Other fields must be completed as required for the message type.

6. An attachment may be added to the feedback report if the feedback report is configured to include an attachment. If configured, the NEW ATTACHMENT option will appear at the bottom of the feedback report as shown below.

Figure 21: Add an Attachment

7. When NEW ATTACHMENT is selected, the following form will appear. Enter a title, choose the file from your desktop, and click UPLOAD ATTACHMENT.

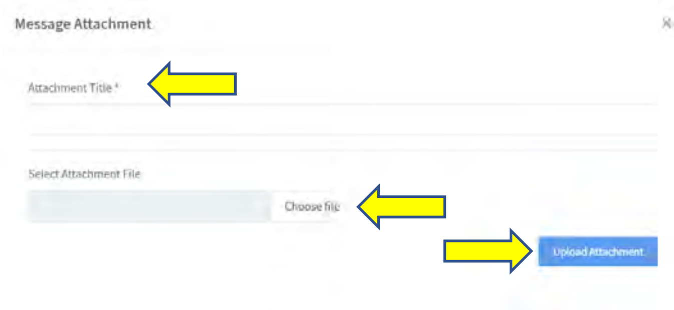


Figure 22: Upload Attachment

8. Click SAVE & EXIT to save the feedback report as a draft or click SEND MESSAGE to send the feedback report to the healthcare provider.

Viewing Sent Messages

For a CBO, all feedback reports that have been sent may be displayed via the SENT MESSAGES page. To access sent messages, follow the steps below.

1. Click on REFERRAL MESSAGES, followed by SENT, as shown below.

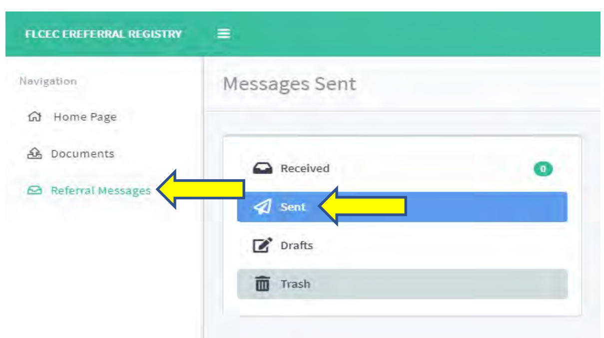


Figure 23: View Sent Messages

2. Sent messages will be displayed as shown in the figure below.

   Details associated with each sent message are displayed including sender, recipient, and message details. Other features on the form include:

   - Specify the number of messages to be displayed.

- Search for specific referrals using the SEARCH option.
- OPEN a message to display message details.
- DELETE a message. When a message is deleted, it is stored in the TRASH, but can be retrieved.

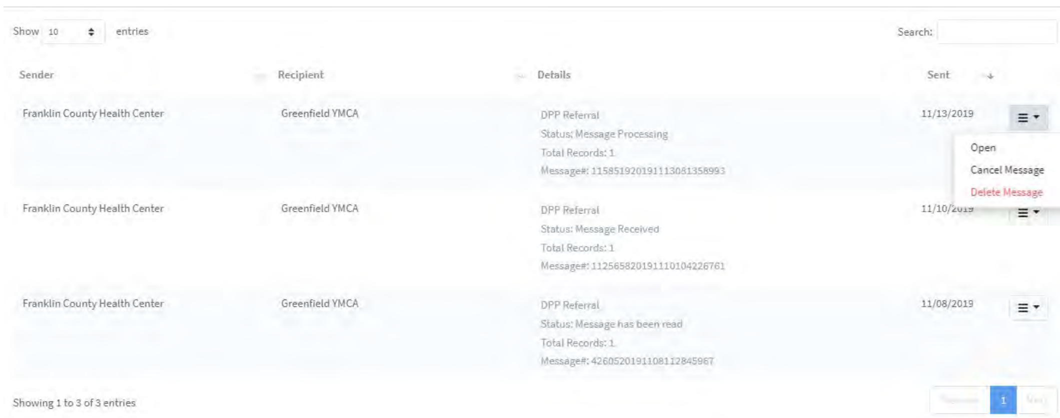


Figure 24: Sent Messages Options

3. Click on OPEN as shown above to view message details. The form shown below will be displayed. The form shows SENDING ORGANIZATION, TARGET ORGANIZATION, PATIENT INFORMATION, and after scrolling down, REFERRAL DETAILS (for a referral) or FEEDBACK DETAILS (for a feedback report).
4. You may PRINT the message by selecting PRINT from the upper right corner of the form.

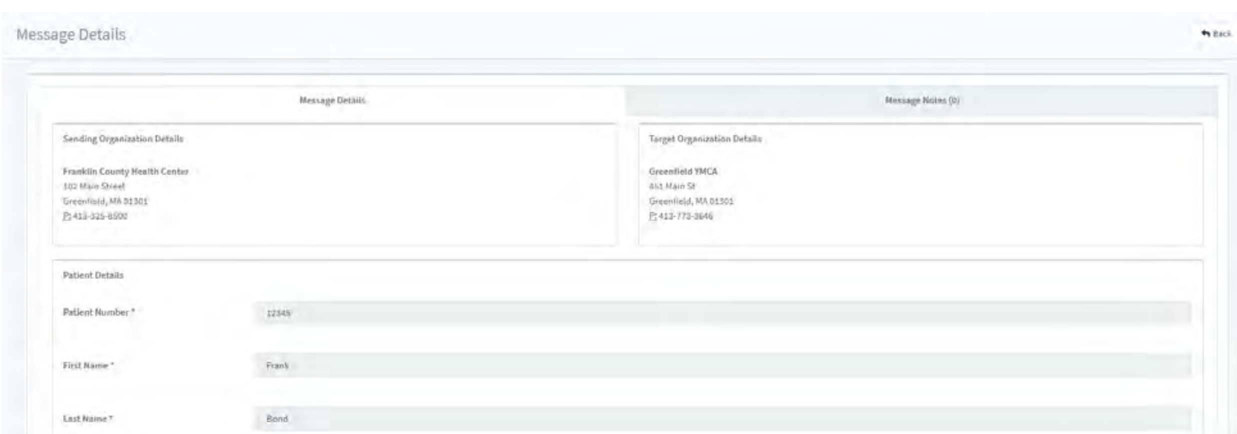


Figure 25: Sent Message Details

Viewing and Completing Draft Messages

When creating a feedback report, you may wish to complete it at a later date. In that event, you may save it as a DRAFT. For a healthcare provider, all referrals that have been saved as drafts may be displayed from the DRAFT MESSAGES page. For a community-based organization, all feedback reports that have been saved as drafts may be displayed from the DRAFT MESSAGES page. To access draft messages, follow the steps below.

1. Click on REFERRAL FORMS and then DRAFTS as shown below.

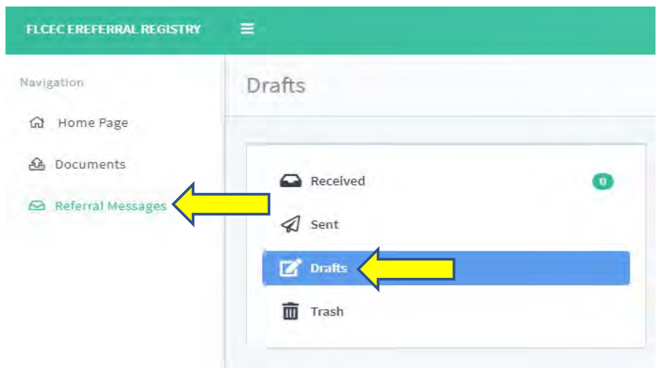


Figure 26: View Draft Messages

2. Draft messages will be displayed as shown in the figure below.

   Details associated with each draft message are displayed including sender, recipient, and message details. Other features on the form include…

   - You may specify the number of messages to be displayed.
   - You may search for specific referrals using the SEARCH option.
   - You can OPEN a draft message to display message details.
   - You can DELETE a draft message.

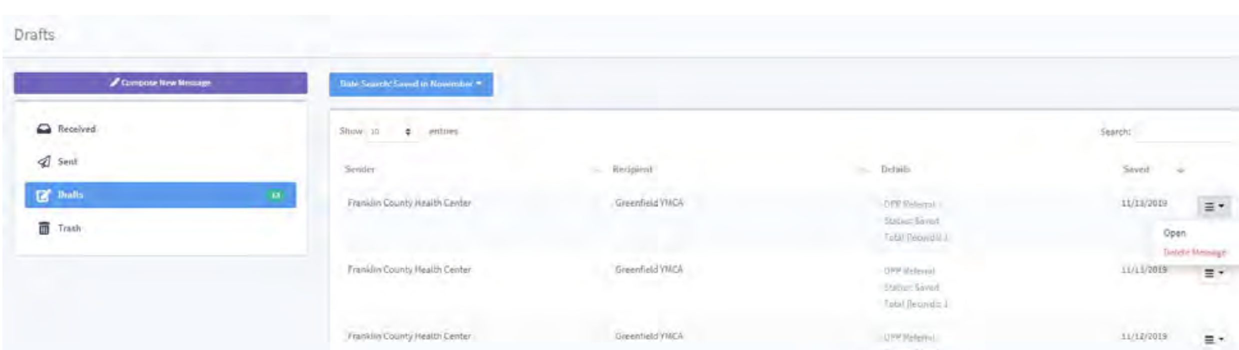


Figure 27: Draft Messages

3. Click on OPEN as shown above to view message details. The form shown below will be displayed. The form shows SENDING ORGANIZAION and TARGET ORGANIZATION. PATIENT DETAILS, PATIENT ADDRESS and REFERRAL DETAILS (for referrals) or FEEDBACK DETAILS (for feedback reports).
4. At this point, you may complete all required information and click SEND MESSAGE at the bottom right corner of the form. Alternatively, you may SAVE & EXIT to save the draft message if it is still not complete.
5. You may PRINT the draft referral by selecting PRINT from the upper right corner of the form.

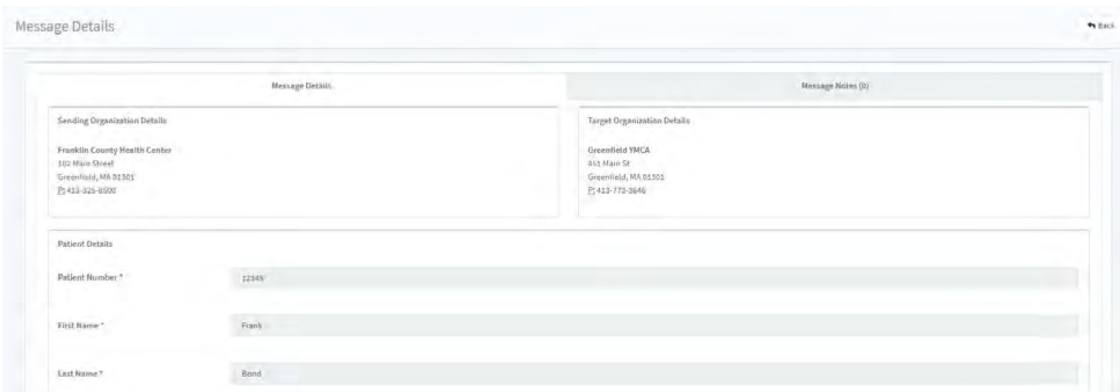


Figure 28: Draft Message Details

Trash

Referral messages, feedback report messages and drafts may be sent to TRASH by system users. This function is provided so that RECEIVED, SENT and DRAFT pages don't become overwhelming with the number of messages being managed. To manage the volume of messages, messages that are no longer needed should be periodically sent to TRASH.

Sending Messages to TRASH

From any message, click on the drop-down list at the far right of the message as shown in the figure below and click DELETE MESSAGE. The message will be sent to TRASH.

Figure 29: Deleting a Message

Recovering Messages from Trash

If a message that has been deleted is subsequently needed, the user is able to restore the message from the TRASH page to the original page where the message was found (SENT, RECEIVED or DRAFT). To restore a previously deleted message, follow the steps below.

1. Click on REFERRAL FORMS and then TRASH as shown below.

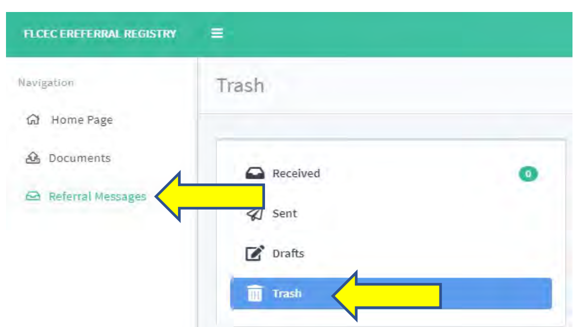


Figure 30: Accessing Trash

2. Deleted messages will be displayed as shown in the figure below. Click on the drop-down list at the far right of the message of interest and click RESTORE. The message will be restored to the page from where it was originally deleted.

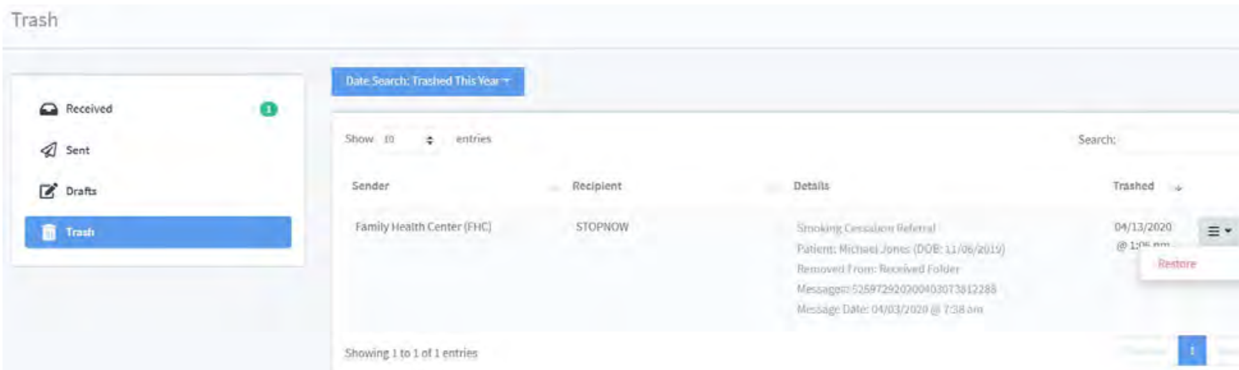


Figure 31: Restoring a Trashed Message

Appendix I

MEDALLIES NETWORK END USER AGREEMENT

MedAllies, Inc., its subsidiaries, and its affiliated entities (collectively, "MedAllies") are pleased to offer online access to MedAllies' proprietary technology and services comprising an interoperable health information infrastructure (the "MedAllies Network"). Such access is governed by this MedAllies Network End User Agreement ("Agreement"). Please read the following information carefully. YOU INDICATE THAT YOU HAVE READ, UNDERSTAND AND CONSENT TO BE BOUND BY, AND YOU AGREE TO COMPLY WITH, THIS AGREEMENT. IF YOU DO NOT AGREE TO BE BOUND BY THIS AGREEMENT, CLICK THE "I DECLINE" BUTTON BELOW, AND YOUR ACCESS TO THE MEDALLIES NETWORK WILL BE TERMINATED.

1. **Certification**. MedAllies, pursuant to its certification authority under the Direct Project, issues digital certificates ("Certificates") to end users of the MedAllies Network. By accepting this Agreement, you authorize MedAllies to perform certain digital certificate-related duties that are normally reserved for Certificate subjects, usually an entity's equipment, personnel, or agents. These duties include managing keys, registering devices, and authenticating personnel with MedAllies and its Certificate systems, and installing, configuring, and managing issued Certificates.
   a. Certificates. You authorize MedAllies to request Certificates in your name and for your use and benefit.
   b. Authorization. You authorize MedAllies to request, issue, verify, use, and manage Certificates and corresponding key sets. You authorize MedAllies' employees and agents to communicate regarding the management of key sets and Certificates, and fulfill the roles related to Certificate issuance. You are responsible for all Certificates requested by MedAllies on your behalf until you send MedAllies written notice that the authorizations provided under this Section 1 are revoked. You hereby authorize MedAllies and its employees to:
      i. Request Certificates for domains and email addresses owned or controlled by you, and you represent that you have the exclusive right to use the domain or email address included in each Certificate, and
      ii. Request Certificates naming you or your equipment, employees, agents, or contractors as the subject.
   c. Duration. The authorizations granted under this Section 1 are coterminous with the applicable subscriber agreement.
2. **Access**. In this Agreement, "you" refers to an individual or organization accessing or using the MedAllies Network. You shall have access to, and may utilize, the MedAllies Network only in accordance with this Agreement.
3. **Use**. You are solely responsible for all data and information you submit to or through the MedAllies Network. In connection with your access to and use of the MedAllies Network, you shall comply with all applicable laws, regulations, rules, and policies of all relevant jurisdictions. In addition, in connection with your use of the MedAllies Network, you shall not:

a. allow, or use the MedAllies Network in any way that would allow, any third party access to the MedAllies Network;
b. represent yourself as another or as a fictitious individual;
c. disrupt or interfere with the MedAllies Network, or the operation or availability thereof;
d. transmit any unlawful, fraudulent, libelous, defamatory, obscene, pornographic, profane, threatening, abusive, hateful, offensive, harassing, or otherwise objectionable information or content of any kind, including, but not limited to, any transmissions constituting or encouraging conduct that would constitute a criminal offense, give rise to civil liability, or otherwise violate any applicable local, state, national, or foreign law;

e. post or transmit any information that violates or infringes in any way upon the rights of others;
f. post or transmit any unsolicited advertisements, solicitations, chain letters, pyramid schemes, investment opportunities or schemes, or other unsolicited commercial communications, or engage in spamming or flooding, or any denial of service attack;
g. post or transmit any data or information, in violation of applicable law, out of the country in which you reside;
h. post or transmit any data or software that cannot be exported without prior government authorization;
i. post or transmit any software or other information that contains a virus, Trojan horse, worm, or other disabling device or harmful component; and
j. modify, decompile, disassemble or reverse engineer the MedAllies Network or any software related thereto.

4. **Termination**. MedAllies may immediately terminate (with no cure period) this Agreement and your access to and use of the MedAllies Network, if: (i) you fail, if required by applicable law, to be licensed, registered, or otherwise authorized by a governmental authority to provide health care services; or (ii) you materially breach this Agreement.
5. **Suspension**. MedAllies may immediately suspend your access to the MedAllies Network, in MedAllies' sole discretion, if MedAllies reasonably determines through verifiable documentation that such access poses a patient safety or confidentiality concern, or a threat to the functionality of the MedAllies Network.
6. **Limitations of the MedAllies Network**. The MedAllies Network is intended to be used to transmit messages between participants in the MedAllies Network ("Participants"), including Participants that are health care providers. There may be errors or omissions in the health information transmitted through the MedAllies Network. MedAllies does not and cannot independently verify or review any information transmitted through the MedAllies Network for accuracy or completeness. You therefore acknowledge that:

a. MedAllies makes no representations or warranties of any kind with respect to the accuracy or completeness of any information or data transmitted through the MedAllies Network;
b. MedAllies is not a health plan or a health care provider;
c. information received through the MedAllies Network is not a substitute for a health care provider's professional judgment; and

d. any decision with regard to the appropriateness of treatment, or the validity or reliability of information transmitted through the MedAllies Network, is the sole responsibility of the applicable patient's health care provider.