The Stage 2 Summary of Care objective (Core 15) involves 3 measures. The 3rd of these measures is that the provider satisfy one of the following:

- Conduct one or more successful exchanges of a summary of care document with a recipient who has EHR technology designed by a different EHR technology developer than the sender’s.
- Conduct one of more successful test exchanges with the CMS-designated test EHR during the reporting period.

These exchanges will utilize the Direct protocol so it is critical that the provider equip their practice with this capability through RevDirect. Once Direct has been enabled for the practice by RevolutionEHR and confirmed via email, the practice can then establish their internal addresses.

**Direct Setup**

The first address to establish is for the location by navigating to Administration > General > **your location** > **External System IDs slider** > **Edit**. Check the “Enabled” box and enter a “Location Direct Address” of choice.

![RevDIRECT Messaging](image)

Clicking “Validate” then allows the address to be checked to verify availability.

![Information](image)

Once the address has been verified as unique, clicking “update” will establish the practice’s “Location Direct Address” and allow individual staff members’ addresses to be created by accessing each employee through Administration > **Employee/Roles** > **Employees** > **select employee** > **External System IDs slider** > **Edit**. The process to establish individual addresses for staff members is identical to that for the practice as described above.

Once an address has been established for the practice or staff member it cannot be changed.
The final step in configuring the practice to utilize Direct for communication and data transfer is to obtain the addresses of external providers. Once known, these are entered by navigating to Administration > Vendors/Partners > External Providers > select provider or add new > Contact Information slider and entering the address in the DIRECT Address field.

Once internal and external providers have Direct addresses entered in their respective RevolutionEHR profiles, the secure electronic exchange of data is possible.

**Exchange with a Recipient Using a Different EHR**

There are two methods for exchanging electronic patient data with another provider.

In situations where a Summary/Transition of Care document is being sent as part of a referral, the entire process can take place within the Show More > Referrals screen. Upon clicking “Add” to enter a new referral, the internal provider’s name will automatically populate the “Referred By” entry. When the referral is being made to an external provider with Direct capability, the “Send Transition of Care” box will be available to the internal provider.
Clicking “Send Transition of Care” will open a new outbound message addressed to the external provider. A personal message and/or additional documentation (i.e., OCT results, consultation letter, etc.) can be added as an attachment if desired. Upon clicking “Send”, an electronic Summary/Transition of Care document is automatically generated and attached to the outbound message.

In situations where a referral is not taking place, an electronic Summary/Transition of Care document can be generated through the “Record Summary” button in the patient header bar by saving the file in XML format.

The messaging module can then be used to send this file as an attachment to an external provider with Direct capability. External providers with Direct addresses logged in their RevolutionEHR profile are visible at the top of the “To” list with an arrow icon.
Exchange with a CMS Designated Test EHR

In the event that a provider is unable to exchange a summary of care document with at least one provider using a different EHR, a CMS-designated test EHR will need to be utilized. Registration and use of a tool called the EHR Randomizer is required in these cases to identify a match and conduct a cross-vendor exchange test.

1. To initiate the registration process, an account must be created on the EHR Randomizer website (https://ehr-randomizer.nist.gov) It is important to note that the “Email” entry here is your actual email address and not your Direct address. This is the address that will be used for communication by the Randomizer and the test EHR to confirm successful exchange.

2. Once an account has been created and you log in, you will need to complete the information on the “My CEHRTs” tab as shown below. Please note that your Direct address needs to be entered in the “Direct Email Address” field, your local time zone needs to be entered in “Time Zone”, and “Health Innovation Technologies, Inc.” should be selected in “Developer”. Select “Yes” for “Direct Trust Membership” and save.
3. Once you’ve entered the CEHRT information successfully, you are ready to be matched to a Test EHR. Proceed to the “My Matches” tab and click “Request New Match”.

4. You will be prompted to collect the information as shown below. Choose the CEHRT label you entered in Step 2 and select “Request Match”.

---

**Request a new match**

**After the Match is created**

The following information will be **REQUIRED** prior to contacting the Test EHR.

- **Contact Name:**
- **Email Address:**
- **Phone Number:**
- **Timezone:**
- **CEHRT Vendor/System & Version:**
- **CEHRT Vendor Contact:**
- **Direct Email Address:**
- **Trust Anchor:**

Select the CEHRT that you want to request a Match for

- **Select CEHRT** RevolutionEHR

[Request match] [Cancel]
5. You will receive a match request confirmation email at the address entered in Step 1. You will also see an alert on the EHR Randomizer that “A new match has been successfully assigned”. (Please note that the EHR Product you are matched against might be different than shown below)

![EHR Randomizer Interface]

6. Click the blue EHR name link under “Matched Against” to view key information about the test EHR needed for the test exchange:

![CEHRT Details]

This is the Direct address that you will send your summary of care document to.
These are the periods of availability that the Test EHR typically performs tests and responds to requests.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Weekly Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/21/2013</td>
<td>11/21/2013</td>
<td>Monday: 12:00 AM to 10:00 AM America/New_York, Tuesday: 12:00 AM to 10:00 AM America/New_York, Wednesday: 12:00 AM to 10:00 AM America/New_York, Thursday: 12:00 AM to 10:00 AM America/New_York, Friday: 12:00 AM to 10:00 AM America/New_York, Saturday: 12:00 AM to 10:00 AM America/New_York, Sunday: 12:00 AM to 10:00 AM America/New_York</td>
</tr>
<tr>
<td>01/27/2014</td>
<td>04/28/2014</td>
<td>Monday: 12:00 AM to 10:00 AM America/New_York, Tuesday: 12:00 AM to 10:00 AM America/New_York, Wednesday: 12:00 AM to 10:00 AM America/New_York, Thursday: 12:00 AM to 10:00 AM America/New_York, Friday: 12:00 AM to 10:00 AM America/New_York, Saturday: 12:00 AM to 10:00 AM America/New_York, Sunday: 12:00 AM to 10:00 AM America/New_York</td>
</tr>
<tr>
<td>04/29/2014</td>
<td>06/30/2014</td>
<td>Monday: 9:00 AM to 10:00 AM America/New_York, Tuesday: 9:00 AM to 10:00 AM America/New_York, Wednesday: 9:00 AM to 10:00 AM America/New_York, Thursday: 9:00 AM to 10:00 AM America/New_York, Friday: 9:00 AM to 10:00 AM America/New_York, Saturday: 9:00 AM to 10:00 AM America/New_York, Sunday: 9:00 AM to 10:00 AM America/New_York</td>
</tr>
</tbody>
</table>

This is the email address to use for requests of the Test EHR:

Email: CMSCrossVendorExchange@
7. Email the Test EHR contact person identified in the previous step to schedule your test of exchange. Include the following information in that introductory email:

- Your name
- Email address
- Phone number
- Location
- CEHRT system, version, and vendor: RevolutionEHR v6.2 (Health Innovation Technologies, Inc.)
- Your Direct address

8. Once your test exchange has been approved, complete the following in RevolutionEHR:

- create a test patient (no real patient clinical data should be used in the exchange)
- generate a summary of care document in XML format for that patient and save to “Documents”

- create a test external provider using a name that you can easily identify
• enter the test EHR “Direct Email Address” obtained from the Randomizer tool into the test provider’s DIRECT address field in RevolutionEHR

9. To perform test:

• download the test patient summary of care XML file (created in previous step) from the patient’s “Documents” folder to your computer
• enter the Messaging module in RevolutionEHR and create a new message addressed “To” the test provider created in the previous step
• attach the test patient summary of care XML file to the message.
• send message to complete test

Completion

You will receive notification via email within 24 hours of submission that the test EHR received your document. You will also receive a Message Disposition Notification (MDN) in your messaging module. This indicates successful completion of the test. Save these messages as proof of completion. You have the ability to send documents to this address again for future test exchanges. In multi-provider practices, one test exchange covers all providers.

In the event that an email notification is not received from the test EHR, please email the test EHR contact to troubleshoot.