



HIE Success Outreach Checklist

Referral Relationship Interview Process

Step 1 Obtain Referral Relationship organization information: (Complete Referral Relationship Worksheet)

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

Step 2 Complete Referral Relationship 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 Referral Relationship 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 Referral Relationship 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)



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

Step 10 Maintain Referral Relationship relationship.

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