

## CLINICAL SUMMARIES

(Core Objective #8)

**OBJECTIVE:** Provide clinical summaries for patients for each office visit.

**MEASURE:** Clinical summaries provided to patients or patient-authorized representatives within one business day for more than 50 percent of office visits.

**EXCLUSION:** Any EP who has no office visits during the EHR reporting period.

### CMS Website for Clinical Summary Measure:

[http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/downloads/Stage2\\_EPCore\\_8\\_ClinicalSummaries.pdf](http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/downloads/Stage2_EPCore_8_ClinicalSummaries.pdf)

### PowerSoftMD Video Link:

<http://www.powersoftmd.com/FlashMU/ClinicalSummaryCCDA101.html>

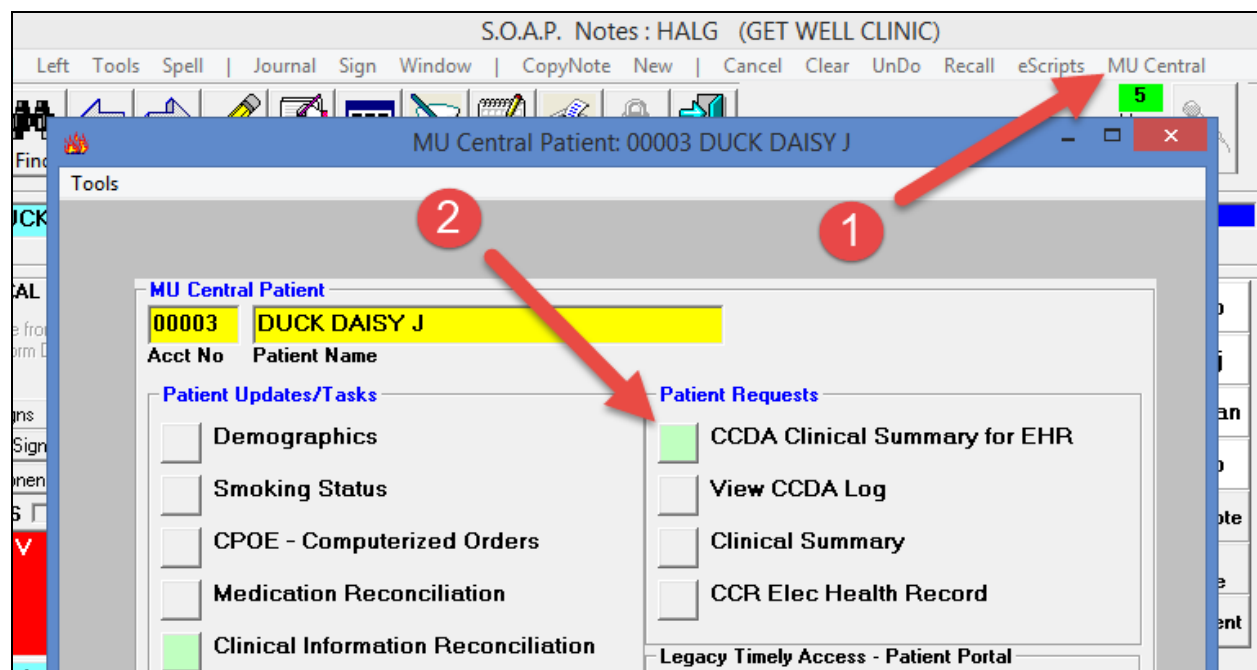
**NUMERATOR:** (Visits Credited) Number of matching visits where a Clinical summary is provided within 1 business day.

**DENOMINATOR:** (Visits Considered) Total number of unique patient visits performed by the provider in the Reporting Period.

### HOW TO:

#### Method 1 (Printing the Clinical Summary)

- 1) From an Open Signed SOAP Note, click the top toolbar option “MU Central”, then select the “CCDA Clinical Summary for EHR” button.



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- 2) On the “**Generate CCDA file**” screen click the Red “**Generate**” button, then the Green “**Print CCDA using Html**” button will be displayed and you can press it. Note: see #6 to learn how to display this screen from the schedule.

Generate CCDA File

Tools | Export Multiple CCDA's | View Options

00003 DAISY J DUCK 03/22/2015  
Acct No Patient Name Date of Service

Who's Receiving the CCDA  
☒ Patient  
☐ This Practice  
☐ Another Doctor

Type Output  
☒ Clinical Summary  
☐ Transition of Care

☒ Limit Lab Results to Newer than DOS or within last 6 Months for CS's  
☐ Export to Legacy Portal

2630

Generate Print CCDA using Html Print CCDA using XML  
Patient Declined View CCDA using Html View CCDA using XML Exit

- 3) This will cause the CCDA (Clinical Summary) to be displayed in your Web Browser. Click the “**Print**” button or use the “**Ctrl-P**” keys to actually print the document.

GET WELL CLINIC  
PORTLAND, OR

Print

**DUCK, DAISY**  
April 4, 1959 Born Female Sex 110107073916280 MRN

1903 Main Street  
Grandview, MO 64919 Address (816) 888-9399 Home Phone (816) 333-9999 Work Phone (816) 857-9350 Mobile Phone

Declined to Specify Language  
Not Hispanic or Latino Ethnicity

**Summary of Care**

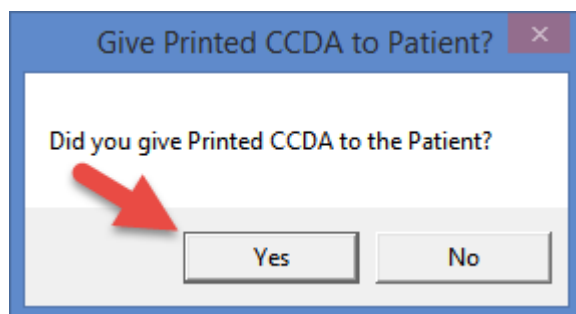
Reason for Visit  
Headache, Fevers, Achiness

Functional Status  
Functional Status Health Issues

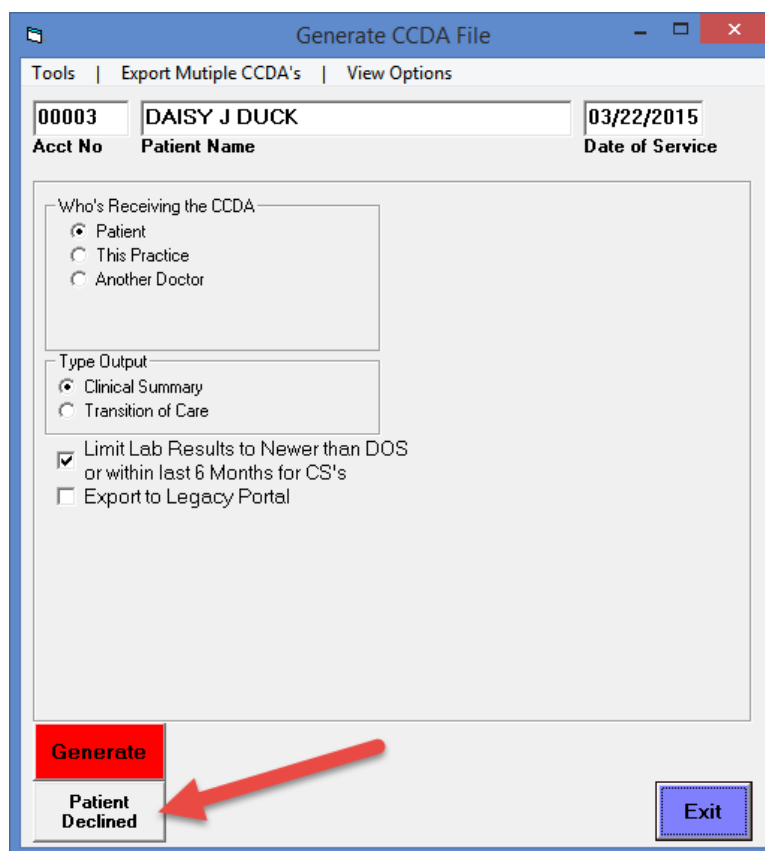
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- 4) After closing your Web Browser Display you will be asked if you printed the document, reply **“Yes”**.



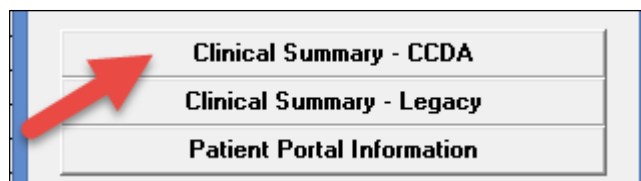
- 5) Of course another course of action would be to indicate that the patient was offered the Clinical Summary and declined it, by clicking the **“Patient Declined”** button as shown below.



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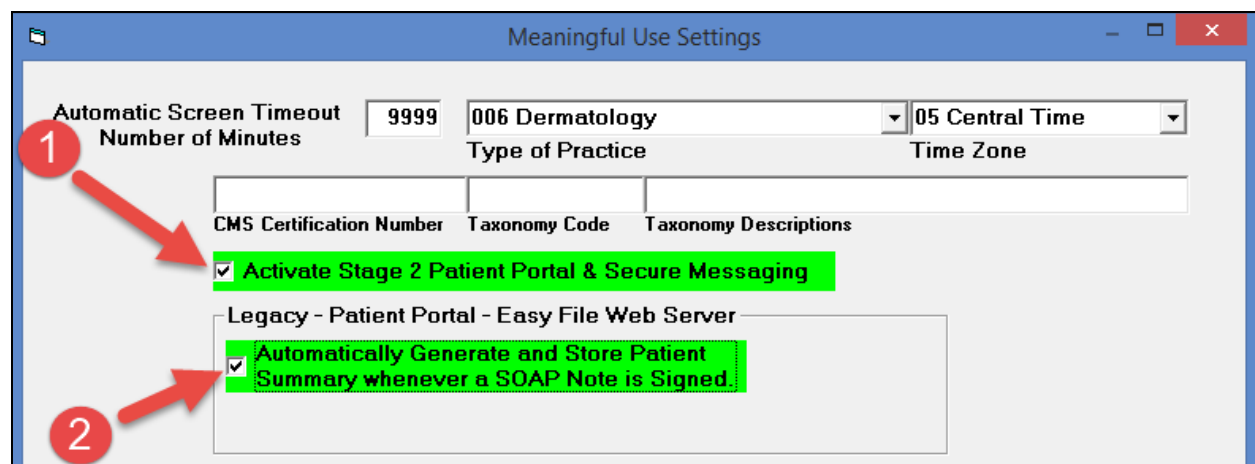
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- 6) You can also bring up the “**Generate CCDA File**” screen from the schedule, by clicking on the patient’s appointment, selecting the “**Print**” button, then “**Clinical Summary - CCDA**” button.



### Method 2 (Uploading Clinical Summary to Patient’s Portal)

- 1) You will need to work with Data Tec to set up your Patient Portal and Secure Messaging option.
- 2) From the Advanced Utility Menu you will select the “**Meaningful Use Settings**” option. On this screen with Data Tec’s help you will set the two options shown below:

A screenshot of a "Meaningful Use Settings" window. At the top, there are fields for "Automatic Screen Timeout Number of Minutes" (9999), "Type of Practice" (006 Dermatology), and "Time Zone" (05 Central Time). Below these are fields for "CMS Certification Number", "Taxonomy Code", and "Taxonomy Descriptions". Two checkboxes are highlighted with green boxes and red arrows: "Activate Stage 2 Patient Portal & Secure Messaging" (checked) and "Automatically Generate and Store Patient Summary whenever a SOAP Note is Signed." (checked). The second checkbox is under a section titled "Legacy - Patient Portal - Easy File Web Server".

- 3) Then for each Patient you will need to Create their Portal, this is a onetime activity for each patient. This process will be documented in the Core 7 topic “Patient Portal”.
- 4) When a SOAP Note is signed a CCDA will be automatically generated and uploaded To the patient’s Portal. Therefore, as long as you sign the SOAP notes within one Business day of their visit, you should meet the criteria.