Agenda

Advisory Group description

HIE Phase 2 description

Key Questions for Advisory Group Discussion

Next Steps
New HIT Council and Advisory Groups

HIT Council & Advisory Group structure going forward

- HIT Council
- Consumer Advisory Group
- Provider Advisory Group
- Technology Advisory Group
- Legal & Policy Advisory Group

Changes for 2013:

• Ad hoc HIE-HIT Advisory Committee subsumed by expanded HIT Council
• Volunteer advisors continue to be a vital part of MassHiway planning - *Working Groups* transition to *Advisory Groups*
• Advisory Groups to mirror Federal Advisory Committees
  • Purpose is to provide advice and expert opinion to the HIT Council
  • Requires focused but limited commitment in order to encourage involvement
  • Focused on targeted issue areas where advice is most needed – supported by staff who will be responsible for documenting AG recommendations
• Existing volunteers have been initially attached to an Advisory Group to get us started in Feb 26/27 meetings – There is flexibility for moving groups and recruiting others
## Advisory Group membership

### Provider Advisory Group – Proposed members

<table>
<thead>
<tr>
<th>Member</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nicolaos Athienites</td>
<td>Renal Medical Care</td>
</tr>
<tr>
<td>William Corbett</td>
<td>UMass Memorial Medical Center</td>
</tr>
<tr>
<td>Drexel DeFord</td>
<td>Steward Health Care</td>
</tr>
<tr>
<td>Ronald Dunlap</td>
<td>South Shore</td>
</tr>
<tr>
<td>Jim Frutkin</td>
<td>ServiceNet</td>
</tr>
<tr>
<td>Gregory G Harris</td>
<td>Psychiatrist</td>
</tr>
<tr>
<td>Neil Kudler</td>
<td>Baystate Health</td>
</tr>
<tr>
<td>Michael Lee</td>
<td>Atrius Health</td>
</tr>
<tr>
<td>Norma Lopez</td>
<td>Physician to Physician EHR Strategies</td>
</tr>
<tr>
<td>Eugenia Marcus</td>
<td>Pediatric Health Care at Newton-Wellesley</td>
</tr>
<tr>
<td>Judy Melin</td>
<td>Lahey Clinic</td>
</tr>
<tr>
<td>Daniel O'Neil</td>
<td>Steward Health Care</td>
</tr>
<tr>
<td>Paul Oppenheimer</td>
<td>Sisters of Providence Health System</td>
</tr>
<tr>
<td>Mike O'Reilly</td>
<td>Steward Health Care</td>
</tr>
<tr>
<td>Naomi Prendergast</td>
<td>D'Youville Senior Care</td>
</tr>
<tr>
<td>David Smith</td>
<td>MA Hospital Association</td>
</tr>
<tr>
<td>Jim Richter</td>
<td>Massachusetts General Hospital</td>
</tr>
<tr>
<td>Dirk Stanley</td>
<td>Cooley Dickinson Hospital</td>
</tr>
<tr>
<td>Scott Wolf</td>
<td>Mercy Hospital</td>
</tr>
<tr>
<td>Andrei Soran</td>
<td>Metrowest Medical Center</td>
</tr>
<tr>
<td>Steve Fox</td>
<td>BCBSMA</td>
</tr>
<tr>
<td>Lynda Young</td>
<td>Former MMS President, retired UMASS</td>
</tr>
</tbody>
</table>
Advisory Group Charges

Overall Purpose: Provide advice and expert opinion to the HIT Council

Objectives by Advisory Group:

Consumer Advisory Group
- Use cases enabled by Phase 2 services
- Statewide MPI and record location approach
- Consent for search & retrieve functions
- Patient-directed messaging
- Outreach and education approaches

Provider Advisory Group
- Use cases enabled by Phase 2 services
- Statewide MPI and record location approach
- Consent for search & retrieve functions
- Patient-directed messaging
- Alignment with MU
- Trusted exchange between participants
- EHR system capabilities and integration options
- Outreach and education approaches

Technology Advisory Group
- Phase 2 functions, technical architecture, and components
- Phase 2 participant integration requirements
- Statewide MPI and record location approach
- Search/retrieve options
- EHR system capabilities and integration options
- HIS-to-HIS connectivity

Legal & Policy Advisory Group
- Statewide MPI and record location approach
- Consent for search & retrieve functions
- Business and legal requirements for Phase 2 participation
- Trusted exchange between participants
Agenda

Advisory Group description

HIE Phase 2 description

Key Questions for Advisory Group Discussion

Next Steps
Mass HIway Phasing

**Phase 1**

**Send and receive**

- Create infrastructure to enable secure transmission ("directed exchange") of clinical information
- Will support exchange among clinicians, public health, and stand-alone registries
- Focus on breadth over depth

**Phase 2**

**Search and retrieve**

- Create infrastructure for cross-institutional queries for and retrieval of patient records
- Add additional public health services
# Mass HIway 2 phase strategy

<table>
<thead>
<tr>
<th>HIE components</th>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider directory</td>
<td>• Provider directory</td>
<td>• Master Person Index</td>
</tr>
<tr>
<td>PKI infrastructure</td>
<td>• PKI infrastructure</td>
<td>• Record locator service</td>
</tr>
<tr>
<td>Direct/HL7 gateway</td>
<td>• Direct/HL7 gateway</td>
<td>• Consent database</td>
</tr>
<tr>
<td>Web portal mailbox</td>
<td>• Web portal mailbox</td>
<td>• Query/retrieve infrastructure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HIE users</th>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any TPO participant</td>
<td>• Any TPO participant</td>
<td>• Any TPO participant that chooses Phase 2 services</td>
</tr>
<tr>
<td>Public health</td>
<td>• Public health</td>
<td>• Public health</td>
</tr>
<tr>
<td>SS, CBHI, MIIS</td>
<td>• SS, CBHI, MIIS</td>
<td>– ELR, PMP, Opioid, Lead</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Possibly Medicaid/HIX participants (patient messaging)</td>
</tr>
</tbody>
</table>

**Deployment and Operation**
(EOHHS and MeHI Last Mile Program)

**Detailed Planning**
(EOHHS with Advice from HIT Council & Advisory Groups)
Phase 1 – Deployment progress to date

Golden Spike - October 16, 2012
• 9 organizations sent production transactions over the Massachusetts HIway

Mass HIway December release – December 28, 2012
• **Hosted Webmail (Early Adopter release v.1.0):** Webmail user can send and receive secure email with payload attachments, view and save attachments, and access provider directory.
• **LAND Device (General Availability (GA) Release v.1.0):** Supports interfaces for Golden Spike beta release plus local support of XDR, FTP, and HTTP (REST) and communication to the HIE via S/MIME XDR or the HIE proxy mode.
• **Clinical Gateway:** Supports two-way secure communication between EOHHS applications and HIway participant systems for Syndromic Surveillance, CBHI, and Immunization reporting. HIway address is @direct.clinicalgateway.masshiway.net
• **Security:** Web based managed services in place to issue digital certificates to support secure messaging, Symantec certificates installed in production infrastructure and all LAND devices deployed during Golden Spike release and webmail.

Last Mile Program has been launched and is setting up to connect organizations to MassHIway
# Phase 2 overall timeline

## Mass HIway Phase 2 high level project schedule

<table>
<thead>
<tr>
<th>Activity</th>
<th>Completion date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit IAPD to CMS</td>
<td>Complete</td>
</tr>
<tr>
<td>CMS approval of Phase 2 IAPD</td>
<td>Feb 2013</td>
</tr>
<tr>
<td>Procurement for Phase 2 services (RFP, Change Orders, Internal Development)</td>
<td>Feb 2013</td>
</tr>
<tr>
<td>Phase 2 infrastructure vendor selected</td>
<td>March 29, 2013</td>
</tr>
<tr>
<td>Phase 2 contract (or change order) executed</td>
<td>Apr 15, 2013</td>
</tr>
<tr>
<td>Go-live for Phase 2, Release 1 (Public Health interfaces)</td>
<td>Apr-Oct, 2013</td>
</tr>
</tbody>
</table>
3 ways to connect to Mass HIway Services

**User types**
- Physician practice
- Hospital
- Long-term care
- Other providers
- Public health
- Health plans
- Labs and imaging centers

**3 HIE Access Methods**
- EHR connects directly
- EHR connects through LAND
- Browser access to webmail inbox

**HIE Services**

**Phase 1**
- Provider directory
- Certificate repository
- DIRECT gateway
- Web portal mailbox

**Phase 2**
- Master person index
- Consent database
- Record locator and retrieval service
Phase 2 Component Description

- Probabilistic patient matching using Initiate system
- Only provide matches that are “direct hits”
- No “fishing” or wildcard searches allowed

- Patient provides consent for organization to respond to queries
- Consent captured at organization and status sent to Mass HIway in HL7 ADT message

- Record locator shows only those organizations that patient has authorized to respond to queries
- Preferred query and response method determined by data-holding entity

Massachusetts eHealth Collaborative
Three Query-Retrieve Methods will be available

**User types**
- Physician practice
- Hospital
- Long-term care
  - Other providers
  - Public health
- Health plans
- Labs and imaging centers

**Phase 2 HIE Services**
- Master person index
- Consent database
- Record locator and retrieval service

**Three Query-Retrieve Methods**

- **Cross-entity viewing**
  - View another EHR within own EHR
  - No data or documents exchanged
  - Single-sign on across systems
  - Used by Atrius, BI, and others today

- **“Push-Push”**
  - Use existing Direct standards for manual request-reply
  - Email-like functionality
  - Does not require new standards – leverages Stage 2 MU

- **“Query-response”**
  - Query with automated response
  - Like electronic eligibility or RX history requests
  - Requires new standards beyond Stage 2 MU

**Request**

**Asynchronous reply**
Two Steps: Record Location and Record Request/Retrieval

1. Locate Record

   Patient record | Dr Smith’s Practice
   Patient record | Dr Jones’ Practice
   Patient record | Dr Cortes’ Practice

   Emergency Department

   Master person index

   Record locations

2. Request and Retrieve Record

   Request

   Response

   Dr Smith’s Practice
Phase 2 supports high-value use cases

**Mass HIway service**

**Use case examples**

- **Medical record location**
  - An emergency room provider uses MassHIway to determine the organization(s) that holds a patient’s medical records
  - A case manager uses HIway to identify the care team that may be serving a patient

- **Medical record retrieval**
  - An emergency room provider uses MassHIway to retrieve a summary record for a patient
  - A provider uses HIway to retrieve prior diagnostic test results and specialist visit records to aid in patient diagnosis

- **Public health reporting**
  - A provider uses MassHIway to report to the public health cancer registry, immunization registry, lab reporting program, opioid treatment program, syndromic surveillance program, or childhood lead poisoning prevention program

- **Patient-directed Messaging**
  - A hospital provider uses MassHIway to send discharge instructions to a patient-specified PHR/portal
  - A patient uses MassHIway to send “clipboard” information to a specialist prior to an initial visit

- **Consent management**
  - A provider uses MassHIway to record a patient’s consent preferences for information sharing via the MassHIway
  - A patient uses MassHIway to set his/her own consent preferences

**Value drivers:**

- Continuity of care
- Patient safety & reduction in adverse events
- Reduction in controlled substance overuse
- Reduction in utilization of medical services
- Enhanced public health reporting adherence
- Supports MU achievement
- Administrative simplification
Agenda

Advisory Group description

HIE Phase 2 description

Key Questions for Advisory Group Discussion

Next Steps
Questions for Advisory Group Discussion

1. Does the overall model and phasing seem reasonable and achievable?

2. Do the Phase 2 services address patient and provider needs for interoperability to enhance quality, efficiency, and affordability of care?

3. Will record location be valuable on its own if it is implemented and made available in advance of electronic query-retrieve capabilities?

4. Do the proposed query-retrieve methods provide enough flexibility and options to maximize adoption?

5. Will organizations be willing to populate the statewide MPI with patient demographic information?

6. What are the most important concerns with the approach at this point?
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HIE Phase 2 description

Key Questions for Advisory Group Discussion

Next Steps
Next steps

- Key points and recommendations synthesized and provided back to Advisory Group for final comments
- Presentation materials and notes to be posted to EOHHS website
- Poll to go out to determine regular meeting time
- Next HIT Council – March 13, 2013, 3:30-5:00 One Ashburton Place, 11th Floor, Matta Conference Room

HIT Council meeting schedule, presentations, and minutes may be found at http://www.mass.gov/eohhs/gov/commissions-and-initiatives/masshiway/hit-council-meetings.html