

Cerner Ambulatory, FirstNet, and PowerChart EDUCATION

**Summary:** CommonWell is a cloud based nationwide alliance that allows the clinician to request patient information from an outside source and incorporate it into the local EHR. Outside sources may include other hospitals, clinics, and provider offices that belong to the alliance. CommonWell is accessed in PowerChart within the patient's chart, from the Outside Records section of the Menu.

**Why:** Provides an additional source of clinical patient information. Data may include problems, allergies, medications, and immunizations that can be imported/reconciled into PowerChart. For practices eligible for Medicaid Meaningful Use incentives, use of CommonWell could improve performance on one of the measures related to transition of care.

When: CommonWell is currently available.

**Support:** Help Desk at 231-935-6053.

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#### Enrollment

#### Auto Enrollment

Before accessing data, patients must be enrolled and linked into CommonWell. For patients at Munson HealthCare, once an encounter is created the patient is enrolled/linked. Once a 100% match of patient demographic data occurs records will download.

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Results Review	Outside Documents Summary	Reconciliation CommonWell: Enrolled
Documentation + Add	External Document List	No previous retrievals initiated 🛛 🖉 🛛 🗐 🗸
Interactive View		Document
MAR Summary	Document Name Status Source	Author(s) Date
Outside Records	No documents found	
		Save to Chart

#### **Manual Enrollment**

When patient demographics do not match perfectly (Name, date of birth, gender, address, zip code), staff will need to enroll the patient. There are three ways to enroll a patient: use the advanced search, link currently listed demographic data, or create a new CommonWell record.

- 1. **Preferred enrollment method**: when available, use potential person matches with demographic data. From **Outside Records** 
  - a. Click CommonWell: Not Enrolled.

Outside Records     Outside Records     Outside Records     Outside Records     Outside Documents     Summary     Reconciliation     CommonWell: Not Enrollee     External Document List     A Retrieval taking longer than anticipated Run New Query     Outside     Document Name     Status Source     Author(s)     Document     Documents     Save to Chart	utes ago			
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Outside Documents Summary		Reconciliation	CommonWell: Not En	rolled
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Document Name	Status Source	Author(s)	Docum Date	ient
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b. Verify with the patient the demographic data, then click Link this Record, Close and Refresh.

		Initial Search (Den	nographics)				
		Actions	Last Name	First Name	DOB	Sex	Address
		Link This Record	Starbuck	Sandra	12/19/1980	F	2845 Dovetail Drive, Hoffman Estates, IL
							Close
c.	Return	to Outside Doc	uments and	click <b>Run Nev</b>	v Query.	un Neu	(Quere <b>2</b> 1



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2. When demographic - 🔒 Outside Records 🗇 Full screen 🛛 👼 Print 🛛 💐 3 minutes ago data is not listed, click 🐴 🗎 | 🖶 🐘 | 🔍 🔍 | 100% - | 🔾 🗎 🗳 Create a New Reconciliation CommonWell: Not Enrolled Outside Documents Summary **CommonWell Record** External Document List 🧥 Retrieval taking longer than anticipated 🛛 Run New Query 🥭 ≡. for this patient, Close and Refresh. CommonWell No d Not Enrolled. Please complete enrollment. \*Confirmed by: Patient ✓ \*Full Name: STARBUCK, SANDRA B Select the CommonWell Record that matches this patient or perform Advanced Search. Initial Search (Demographics) Last Name First Name DOB Sex Address Actions Link This Record Starbuck Sandra 12/19/1980 F 2845 Dovetail Drive, Hoffman Estates, IL ate a new CommonWell Record for this patient? Close 3. A third option is to select Advanced Search. CommonWell Not Enrolled. Please complete enrollment. ✓ \*Full Name: STARBUCK, SANDRA B \*Confirmed by: Patient Select the CommonWell Record that matches this patient or perform Advanced Search. Select the CommonWell Record that matches this patient or perform Advanced Search. a. Enter the patient's Driver's License State and Driver's License \*State: \*Number: Search < Number and click Search. Actions Last Name First Name DOB Sex Address b. Click Link This Record, Initial Search (Demographics) Close and Refresh. Last Name First Name Sex Address DOB Link This Record Starbuck 2845 Dovetail Drive, Hoffman Estates, IL Sandra 12/19/1980 F Close 4. CommonWell: Enrolled indicates the patient is enrolled and there are no new sources at this CommonWell: Enrolled time.



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#### **Enrolling Patients Under the age of 18 years**

- 1. From **Outside Records**:
  - a. Click CommonWell: Not Enrolled.

2.	Enter the <b>name of the person</b>
	confirming and their relationship
	to the patient.



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ocuments Summ					
I Document Li	st				Last query as of 06/27/2019 14/20
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commonweil					
A Not Enrolled.	Please complet	e enrolment.			
A Patient is an	adolescent, PAT	IENT MUST CONFIRM THEI	R OWN VEST L	INKS. (	CONTINUENS TO ENROLL THIS PATIENT CONFIRMS YOUR
ACKNOWLEDGENE	ENT.				
*Confirmed by:		Full Name:			
CommonWell     C					
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*Confirmed by: Select the Common Initial Search (Den Actions Link This Record	Well Record that m mographics) Last Name HULL	Full Name:      Atches this patient or performance      Full Name      OHRSTOPHER	m Advanced Sc Doe 06/16/2010	sarch.	Addwai 3074 9.8PLE CRAYON STREET, ANN 4RBOR, MJ 48104
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*Confirmed by: Select the CommonW Initial Search (Den Actaux Link This Record Link This Record Link This Record Link This Record Link This Record	Null Record that in nographics) Lat Norie HULL HULL HULL HULL	Full Name: atches this patient or performed First Name CHRISTOPHER, CHRISTOPHER, MA OHRISTOPHER, CHRISTOPHER, CHRISTOPHER, CHRISTOPHER,	m Advanced Se Dose 06/16/2010 06/16/2010 06/16/2010 06/16/2010	Sec M M M M	Addinii 3074 PLRPLE CRAYON STREET, ANN ARBOR, MI 48104 1083 ISAACS CREEK ROAD, HULL, 82:H3 1083 ISAACS CREEK ROAD, HULL, 82:H3 1083 ISAACS CREEK RD, HULL, 82:H3
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3. Verify with the patient the demographic data, then click Link this Record, Close and Refresh.

Γ	Initial Search (Dem	ographics)				
	Actions	Last Name	First Name	DOB	Sex	Address
	Link This Record	Starbuck	Sandra	12/19/1980	F	2845 Dovetail Drive, Hoffman Estates, IL
Ι						Close

4. Return to Outside Documents and click **Run New Query.** 

#### **Confirming New Sources**

- Confirm sources with the patient to verify that they have received care at the listed locations.
  - Instructions:

5. Click Close. Close

 $1. \quad \text{Go to} \ \textbf{Outside Records} \ \text{in the patient chart}.$ 

4. Click Confirm (Remove if patient denies).

Click on CommonWell New Sources.
 Confirm document/visit with patient.



Run New Query 🔊

6. View Confirmed Sources tab displays.

[	Outside Documents Summary				Click he	re for New Sour	ces CommonW	/ell: New Sou	rces (1)
	External Document List					A Retrieval taking longer than	anticipated Run New Qu	ery 🖓 🧹	
	Document Name           Summary of Episode Note           Emergency department Note	Sources To Confirm (1	1) View Con	firmed Sources (41)	Local Record:	Munson Medical Ce	08/2 08/1	ment Date \$/2020 1/2020	2
	4	Actions Confirm Remove	Last Visit	Source Cerner Healt	the Clinic	1			
	Sources To Confin	m (0) View Confirmed S	Sources (42)	Local Record: Munsor	n Medical C				
	Actions	Last Visit 6	Source						
	Remove		Cerner Health	e Clinic	1				
	Remove		Mission Healt	h Systems	1				
	Remove		Fresenius Kidi	ney Care	1				
	Remove		Tiger Institute	e Health Alliance	-				

#### View and Save Documents

- Providers and clinical staff can view outside records from the External Document List.
- When data is clinically significant, providers can save outside information to the chart.
- Instructions to Save to Chart:



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rnal	Document List			Retrieval taking longer than anticipated R	un New Query 🧟
	Document Name	Status	Source	Author(s)	Document Date
	Summary of Episode Note	Reviewed	Tiger Institute Health Alliance	Tiger Institute Health Alliance	08/24/2020
~	Emergency department Note	New	McLeod Regional Medical Center	Frank Mathies	08/11/2020
	Summarization of episode note	New	McLaren Oakland Waterford Medical Associates	Cerner Corporation - Millennium Clinical Document Generator	06/26/2020
	Summarization of episode note	New	McLaren Central Weidman Clinic	Cerner Corporation - Millennium Clinical Document Generator	06/25/2020
	Summarization of episode note	New	H. Lee Moffitt	Cerner Corporation - Millennium Clinical Document Generator	05/15/2020
	Summarization of episode note	New	H. Lee Moffitt	Cerner Corporation - Millennium Clinical Document Generator	05/14/
	Summarization of episode note	New	H. Lee Moffitt	Cerner Corporation - Millennium Clinical Document Generator	05/01 2
	Summarization of episode note	New	Virginia Mason Downtown Medical Center	Cerner Corporation - Millennium Clinical Document Generator	03/14/2020

- 1. **Click** on the document name to view the document.
- 2. Click Save to Chart.
- 3. An icon appears in the far right-hand column to indicate Saved documents.
  - o Please note: when a document is saved to the patient's chart, it is releasable with a full chart release request. Unsaved documents are not technically a part of the clinical record. The information is still available in the Outside records Menu tab for providers to view.
- 4. To view: go to Clinical Notes/Documentation; Outside Records folder to open the specific note type, i.e. "ED Note".

Clinical Notes	🕂 Add	
Code Status-AMD		Transitions of Care
Documentation	🕂 Add	Outside Records
Form Browser		8/11/2020 9:30 EDT - "ED Note"

#### **View Summary Content**

\_

The summary view provides an aggregate of patient data received from external CommonWell sources.

Outside Documents	Summary 1			1			
Timeframe: Layout: All Records V Auto	ame: Layout: Sources: Records V Automatic V All Sources V		Use filters as desired.	Jse filters as desired.		@ ⊼	
Allergies (8)			Social History (28)			Show Disclaimer	E
Allergy 🔻	Status	Source	Report Name		Date Completed 🔺	Source	
acetaminophen	Active	IC	Sex Assigned At Birth	1	08/21/2018	MHAC	
amoxicillin	Active	HH	Social History	1	08/20/2018	MMC-NI	
aspirin	Active	HH	Sex Assigned At Birth	1	06/23/2018	IM	

#### Reconcile Outside Data (Home Meds, Allergies, Histories, and Immunizations)

- Certain data elements such as Home Meds, Allergies, Histories and Immunizations information can be reconciled or • pulled into the patient medical record and viewed along with similar data in the patient's Cerner medical record.
- Instructions for Reconciliation:



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- 1. Check the document box.
- 2. Select Reconciliation.

<b>(</b> > -	🔒 Outside Records	E	Reconciliation View		- 0	×		[D] Full screen	🗃 Print	2 45 minu	utes ag
*		SH	HERMAN, FELIC	IAT Female 68 years DOB:9/6/1952				2			
Outside D	ocuments Summary	Rec	onciliation $\checkmark$				Ke	conciliation	Commonwell:	New Sourc	es (1)
External	Document List		Home Medicat	ions		G .	longer th	an anticipated Ru	un New Query	æ _/ :	≣•
	Decument Name		All Vicite						Decumon	t Data	
	Summary of Episode Note	ſ  -	All visits						08/24/20	20	2
	Emergency department Note	Γ.	You are view	ing unverified data from outside sources. Interaction checking and	Clinical Decision Support are not available until data is a $\checkmark$				08/11/20	20	2
	Summarization of episode note						Documen	t Generator	06/26/20	20	-
	Summarization of episode note		<ol> <li>Information.</li> </ol>	Munson Healthcare is in compliance with HIPAA and has offered the pati	ient a Notice of Privacy Practices.		Documen	t Generator	06/25/20	20	
	Summarization of episode note	1	_			_	ocumen	t Generator	05/15/20	20	
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	Summarization of episode note		▼ Unverified Data	Button names vary section			Documen	t Generator	05/07/20	20	
	Summarization of episode note		🖃 Bayer Aspi	to section:	New medication found		Documen	t Generator	03/14/20	20	
			325 mg, Tab						S	ave to Ch	art
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			Last Prodified Da	* Complete Reconciliation				Scrol	ll to re	econ	cile
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		Ľ	Allergies		<u> </u>	_	1				
		1.4	All Visits			-					
			You are view	ing unverified data from outside sources. Interaction checking and	Clinical Decision Support are not available until data is a $\checkmark$						
							1				
			<ul> <li>Unverified Data</li> </ul>	from Outside Sources (4)							
						~					

- 3. Click Complete History, Complete Reconciliation, or Import to reconcile outside data for each section.
  - o Scroll to each section in the Reconciliation View window; each section is reconciled separately.





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3. Contact the **Privacy Officer** to finish the process.

#### When No Outside Sources Exist (Ambulatory Sites Only)

When there are no sources, for example:

- No outside records or CCDs that display in Outside Documents and/or
- No CCD via Direct Trust email has been sent by referring provider do the following:
- 1. From within the patient's chart, go to Ad Hoc.
- 2. Open/chart the Request/Accept SOC Denominator Exclusion form.

🔲 🖹 Request/Accept SOC Denominator Exclusion

D Summary of	Care Denominator Exclusion - SHIPPY, JOHN DANIEL		×
*Performed on:	07/29/2019 🔺 🕇 1517	By: Gray, Debora	h M
Request and Acc	Request and Accept Summary of Car	e (SOC) Denominator Exclusion	
	Was an HIE Queried?	An electronic summary of care record was requested to be sent and an electronic summary of care record was not received?	E
		O Yes	-
	•	III	Þ
In Progres			c i

The Request and Accept Summary of Care (SOC) Denominator Exclusion form
will be located in the following Ad Hoc folders:
Ambulatory home folder
Provider Ambulatory Care

Behavioral Health Ambulatory Care

This action will remove the patient from the Meaningful Use denominator.

#### FAQs

What is CommonWell? CommonWell is an association that facilitates the sharing of health data. CommonWell is vendor agnostic and so we can access documents from other participating organization and clinics who are on a platform outside of Cerner.

What is a CCD? A CCD is a Continuity of Care Document. CMS requires that certain data be included on a CCD in a structured format that enables data sharing.

**Does CommonWell Health Alliance maintain a central copy of people's clinical records?** No. CommonWell acts as more of a broker. Data is retrieved from the provider system where it was created.



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How far into the past are documents received from CommonWell? The first time we query, there is a 180 day look back. Subsequent queries look back 30 days prior to the last query to allow for some overlap.

**Can the provider link the patient and confirm sources?** Yes, but there should be a conversation with the patient or responsible family member as a part of this process.

**How does the Summary Tab work?** The Summary tab provides a view only page of aggregated patient data received from external sources. The Summary is intended to support optimal patient care. It is not intended to replace the patient's medical record, nor is it guaranteed to encompass all historical information on patients. There is hover functionality so users can see the source of outside data without added clicks. There is also search functionality if users are looking for a specific topic.

How long do documents stay on the Outside Documents tab? Documents do not fall off the Outside Documents tab.

Does the Continuity of Care document (CCD) need to be saved to the chart before the problems, allergies, medication and immunizations can be added to the local record? No. All structured data from the CCD is available to be reconciled by the nurse regardless of if the document is saved to the chart.

Who decides if a document should be saved to the chart? This is a provider decision.

**Do I need to save every document I look at to the chart?** No. The recommendation is that if a document is used in clinical decision making, it should be saved to the chart.

**Do saved outside documents print with the legal medical record?** Anything added from outside documents is included in the chart and in medical record printing except the CCD.

If I save a document to the chart, does it show face up that I am the person who saved it? No. The document is tagged with the name of the original author and appears chronologically according to the date it was authored.

**Is every document from outside organizations available through CommonWell?** Each organization decides what documents will be accessible through CommonWell so the documents received may vary from organization to organization.

Are all documents created in MHC available to others through CommonWell? At discharge, every patient from an inpatient unit will have a CCD created which is available through CommonWell. At this time, the Hospital Summary, Consultation Notes, Operative Notes, ER Reports, and H&Ps are the only other documents MHC will make available through CommonWell.