Procentive

Real World Test Scripts 2021

b(1) Transitions of Care

METRIC: Over two weeks' time, observe the capture in the audit log of the number of messages with CCDAs attached successfully sent

SCRIPT:

1. Go to the Clients Module
2. Find Bruce Paltrow (Client Num 6148) and open his record
3. Review the active diagnoses for Bruce in the Diagnosis Tab
4. Review the active medications in the "medical" link
5. Review the active Medication Allergies
6. In the drop-down in the lower left-hand corner of the screen, click "Send C-CDA"
7. Select Dr. Hart from the contacts picklist, and confirm Direct Address is entered
8. Click "send"
9. Confirm 10e11 eCR received C-CDA
10. Go to the messaging module
1. Find message sent to Dr. Hart
2. Download C-CDA to confirm active diagnoses, medications, and medication allergies are present
3. Change filter at top of module to display "incoming"
4. Find message received from "Dr. Hart"
5. Open and view message, along with status line, "subject" line, "from" line, and viewing the attached C-CDA.
6. Download the attached C-CDA

b(2) Clinical Information Reconciliation

METRIC:

1. Count number of times reconciliation of medications, allergies and problems is performed over a two-week time frame

SCRIPT:

1. Go to the Client Module
2. Find Bruce Paltrow (Client Num 6148) and open his record
3. Click on the "medical" link
4. In the drop-down in the lower left-hand corner of the screen, click "View/Import C-CDA"
5. Click "choose file" and select the C-CDA you downloaded from the messaging module
6. Click "View" C-CDA

7. Click "Import"
8. Select the check boxes for the Diagnosis, Medication, and Medication Allergies that you would like to import into the client record:
   a. Diagnosis: Tourette Syndrome
   b. Medication: Augmentin
   c. Medication Allergy: Sulfonamides (Sulfa)
9. Ignore the duplicate diagnosis "ADHD" and the duplicate medication "Adderall"
10. Click "Save"
11. Verify the medications, medication allergies, and diagnoses that you selected from the outside C-CDA saved in the client record in the summary page

b(6) Data Export

METRICS:

1. Count the number of times data export is performed over a two-week time frame.

SCRIPT:

1. Go to https://app.procentive.com
2. Log in with credentials: (username) demo.kacton (password) abcd1234
3. Go to the Electronic Module
4. Click on the "Generate batch C-CDA" link
5. Click on the pick list button and select April Aadams from the list
6. Click "Ok"
7. Type "Referred to new agency for ongoing care" in the Reason For Referral text box
8. Click "Send to Messaging"
9. Navigate to the Messaging Module
10. Open the new message titled "C-CDA Message"
11. Click on the zip file in the message
12. Click "Save as C-CDA" in the option menu
13. Save to your desktop
14. Unzip and open file on desktop to view and confirm successful generation of C-CDA
15. Navigate to the Electronic Module
16. Go to "Schedule Batch C-CDA File"
17. Click on Generate batch C-CDA
18. Fill out a date range from [1/1/2022-4/15/2022]
19. Select the "Download all clients" check box
20. Schedule the time for [Test Date and 2 minutes in the future]
21. Click "Schedule"
22. Wait 2 minutes and navigate to the Messaging Module
23. Find the new message titled "C-CDA Message"
24. Click on the zip file in the message
25. Click "Save to desktop"
26. Unzip and open file on desktop to view

c(1) Record and Export

METRICS:

1. Count of unique customers that have exported at least one QRDA I document in Q1 at all sites.

SCRIPT:

CMS 136

1. Log in with credentials: (username) demo.kacton (password) abcd1234
2. Go to the Medication module
3. Search for client "Bruce Paltrow" (Patient Number 6148)
4. Click on "Create New Prescription"
5. Search for "Adder" and select "Adderall (dextroamphetamine-amphetamine) tablet
6. Select the 5mg tablet
7. Fill out the prescription information as follows:
   a. Action: Take
   b. Dose: 1
   c. Dose Unit: Capsule
   d. Route: "By Mouth"
   e. Frequency: twice a day
   f. Days Supply: 180 days
   g. Quantity: 360
   h. Unit: tablet
8. Click "Review"
9. Click "Save and Add Rx"
10. Type in the prescription password of "1234" and click "send"
11. Navigate to the Time module
12. Click "Add"
13. Enter in the date "1/5/2022" into the date field
14. Search for "paltrow" in the client field and select (Bruce Paltrow) (Patient Number 6148)
15. Search for code "90792" in the code field and select "90792 Psychiatric diagnostic evaluation with medical services"
16. Select "ACT" in the Program drop-down
17. Confirm the diagnosis code "F06.4" is selected
18. Enter a start time of "1:00pm" and an end time of "2:00pm"
19. Click "Save"

CMS 155 and CMS 177

1. Navigate to the Time Module
2. Click the "Add" button in the upper right-hand corner
3. Enter in the date "1/10/2022" into the date field
4. Search for "paltrow" in the client field and select (Bruce Paltrow) (Patient Number 6148)
5. Search for code "G0402" in the code field and select "G0402 Initial preventive physical examination; face-to-face visit, services limited to new beneficiary during the first 12 months of medicare enrollment"
6. Select "ACT" in the Program drop-down

7. Confirm the diagnosis code "F06.4" is selected
8. Enter a start time of "1:00pm" and an end time of "2:00pm"
9. Click "Save"
10. Reopen the service line just created
11. Click on the "clinical quality documentation" link on the bottom of the window
12. Navigate to the "Weight" tab
13. Fill out the following:
    a. Were vitals recorded during this vist?   "Yes"
    b. Action taken on BMI data: "BMI is within parameters"
    c. Did patient receive nutrition counseling this visit? "Yes"
    d. Did patient receive physical activity counselling this visit? "Yes"
    e. Is patient pregnant? "No"
14. Navigate to the Mental Health/Patient Education tab
15. For the "Was depression screening performed during this visit?" question, select "Yes" in the drop-down
16. For the "If yes, a PHQ-9 form should be filled out." enter the PHQ-9 score of 15
17. For the "Was a suicide risk assessment performed during this visit?" question, select "Yes"
18. Click Save
19. Close the window

CMS 138, 159 and CMS 161

1. Navigate to the Time Module
2. Click the "Add" button in the upper right-hand corner
3. Enter in the date "1/6/2022" into the date field
4. Search for "Abernath" in the client field and select (Jane Abernath) (Patient Number 2095)
5. Search for CPT code "90834" in the Code field and select "90834 Psychotherapy – 45 minutes (38-52 minutes)"
6. Select "ACT" in the Program drop-down
7. Confirm the diagnosis code "F06.4" is selected
8. Enter a start time of "1:00pm" and an end time of "2:00pm"
9. Click "Save"
10. Click on the Date on the Service Line you just created
11. Click the "clinical quality documentation" link at the bottom of the window
12. Click the "Mental Health/Patient Education" tab
13. For the "Was depression screening performed during this visit?" question, select "Yes" in the drop-down
14. For the "If yes, a PHQ-9 form should be filled out." enter the PHQ-9 score of 15
15. For the "Was a suicide risk assessment performed during this visit?" question, select "Yes"
16. Click on the Substance Use Tab
17. For the "Was patient asked about tobacco use?" question, select "Yes - has used tobacco in the previous 24 months
18. For the "Smoking status" question, select "Current-some day smoker"
19. For the "Tobacco cessation method" question, select "Tobacco use cessation counseling"
20. Click Save

21. Close the window
22. Click the "Add" button in the upper right-hand corner
23. Enter in the date "5/6/2022" into the date field
24. Search for "Abernath" in the client field and select (Jane Abernath) (Patient Number 2095)
25. Search for CPT code "90834" in the Code field and select "90834 Psychotherapy – 45 minutes (38-52 minutes)"
26. Select "ACT" in the Program drop-down
27. Confirm the diagnosis code "F06.4" is selected
28. Enter a start time of "1:00pm" and an end time of "2:00pm"
29. Click "Save"
30. Click on the Date on the Service Line you just created
31. Click the "clinical quality documentation" at the bottom of the window
32. Click the "Mental Health/Patient Education" tab
33. For the "Was depression screening performed during this visit?" question, select "Yes" in the drop-down
34. For the "If yes, a PHQ-9 form should be filled out." enter the PHQ-9 score of 2
35. Click Save
36. Close the window

CMS 137

1. Find and open the client "Fred Azure" (Patient Number 8036)
2. Navigate to the Diagnosis tab
3. Click on the picklist on the first diagnosis line
4. Search for "F16.2" and select "Hallucinogen Dependence"
5. Select Diagnosis Date of "1/2/2022"
6. Click "Save"
7. Navigate to the Time Module
8. Click the "Add" button
9. Enter the Date of "1/2/2022" in the Date field
10. Search and select client "Fred Azure" in the client field
11. Search and select "99202" in the code field
12. Select the program "Chemical Health" in the program drop down.
13. Enter in a Start Time of 10:00am and a Stop Time of 10:30am
14. Click "Save"
15. Click the "x" button in the upper right-hand corner of the Add Clinical Documents window to close
16. Back in the Time Module, click "Add"
17. Enter the Date of "1/15/2022" in the Date field
18. Search and select client "Fred Azure" in the client field
19. Search and select "90834" in the code field
20. Select the program "Chemical Health" in the program drop down.
21. Enter in a Start Time of 10:00am and a Stop Time of 10:30am
22. Click "Save"

23. Click the "x" button in the upper right-hand corner of the Add Clinical Documents window to close
24. Back in the Time Module, click "Add"
25. Enter the Date of "1/20/2022" in the Date field
26. Search and select client "Fred Azure" in the client field
27. Search and select "90834" in the code field
28. Select the program "Chemical Health" in the program drop down.
29. Enter in a Start Time of 10:00am and a Stop Time of 10:30am
30. Click "Save"
31. Click the "x" button in the upper right-hand corner of the Add Clinical Documents window

CMS 128

1. Navigate to the Client Module
2. Search and open client "Jenette Coffey" (Patient Number 1457)
3. Click on the picklist on the first diagnosis line
4. Search for "F33.1" and select "Major depressive disorder recurrent moderate"
5. Select Diagnosis Date of "1/2/2022"
6. Click "Save"
7. Navigate to the Time Module
8. Click the "Add" button
9. Enter the Date of "1/3/2022" in the Date field
10. Search and select client "Jenette Coffey" in the client field
11. Search and select "99202" in the code field
12. Select the program "Chemical Health" in the program drop down.
13. Enter in a Start Time of 10:00am and a Stop Time of 10:30am
14. Click "Save"
15. Click the "x" button in the upper right-hand corner of the Add Clinical Documents window to close
16. Navigate to the Medication Module
17. Search for client "Jenette Coffrey"
18. Click on "Create New Prescription"
19. Search for "Zoloft" and select "Zoloft" (sertraline) tablet
20. Select the 25mg tablet
21. Fill out the prescription information as follows:
    a. Action: Take
    b. Dose: 1
    c. Dose Unit: Tablet
    d. Route: "By Mouth"
    e. Frequency: twice a day
    f. Days Supply: 180 days
    g. Quantity: 360
    h. Unit: tablet
22. Click "Review"

23. Click "Save and Add Rx"
24. Type in the prescription password of "1234" and click "send"

c(2) Import and Calculate and c(3) Report

Metric:

1. Count number of imported QRDAs which demonstrates successful calculation of CQM's based on imported file
2. Count number of QRDA are exported with correct CQM calculation

Script:

1. Go to your work email inbox
3. Open email from Therapy Brands titled "Test QRDA Files"
4. Download attachments titled "QRDA C2" to computer
5. Go to https://app.procentive.com
6. Log in with credentials: (username) demo.kacton (password) abcd1234
7. Go to the Electronic Module
8. Click on "Import QRDA" link
9. In the new window, click "Choose File" and select the file downloaded from your email titled "RWT QRDA 1"
10. Click "Import QRDA" and then "Save"
11. Repeat Steps 8 & 9 for the remaining files entitled:
    a. "RWT QRDA 2"
    b. "RWT QRDA 3"
    c. "RWT QRDA 4"
    d. "RWT QRDA 5"
    e. "RWT QRDA 6"
    f. "RWT QRDA 7"
    g. "RWT QRDA 8"
12. Click on the "Generate QRDA" link
13. Select Report Type "QRDA I (2015 Certification)
14. Select Report Year "2022"
15. Select Report Measure "CMS128"
16. Select Staff "Kendall Acton"
17. Click "Create"
18. Repeat steps 12-13
19. Select Report Measure "CMS136"
20. Repeat Steps 15-16
21. Repeat steps 12-13
22. Select Report Measure "CMS137"
23. Repeat Steps 15-16
24. Repeat steps 12-13
25. Select Report Measure "CMS138"
26. Repeat Steps 15-16

27. Repeat steps 12-13
28. Select Report Measure "CMS159"
29. Repeat Steps 15-16
30. Repeat steps 12-13
31. Select Report Measure "CMS155"
32. Repeat Steps 15-16
33. Repeat steps 12-13
34. Select Report Measure "CMS161"
35. Repeat Steps 15-16
36. Repeat steps 12-13
37. Select Report Measure
38. Repeat Steps 15-16
39. Repeat steps 12-13
40. Select Report Measure "CMS177"
41. Repeat Steps 15-16
42. Open generated files to view
43. Repeat steps 11-41 and select QRDA III in step 12 instead of the QRDA I.

e(1) VDT

METRIC:

1. Count number of instances a C-CDA View, C-CDA Download, and C-CDA Transmit for the user

SCRIPT:

1. Go to Portal at https://app.procentive.com/clientportal2/
2. Log in with credentials: (username) testRWT (password) test1234
3. Go to the "Documents" page using the left-hand sidebar Navigation Menu
4. Click on the "Transition of Care" option on the sub-menu
5. Click on the "View human readable C-CDA" and view the full record, verify all data elements are represented
6. Navigate back to the portal window
7. Click on the "Download C-CDA Zip" button
8. Open the downloaded C-CDA.zip file
9. Click on the C-CDA.xls file, hold down the "shift" key, and click on the "Payer_UCare.xml" file
10. Click "Extract" and extract to your downloads folder.
11. Navigate to your downloads folder
12. Double-click on the .xsl file and open in the Edge browser.
13. Double-click on the .xml file and view in the Edge Browser
14. Navigate back to the portal window
15. While still on the "Transition of Care" page, go to the "Transmit Summary" tab
16. Click the "Manual Message" radio button
17. Type in proc3@hintest2.hin.us
18. Type "Testing C-CDA Transmission" in the "Message" text box
19. Click on the "I agree" check box
20. Click the "Send" button

21. Type "Yes" into the pop-up window to confirm sending PHI
22. Confirm all 3 actions, View, Download, Transmit occurred and was logged by clicking on "Activity History Log" on the left panel.

f(1) Transmission to Immunization Registries

METRICS:

1. Count of user organizations live with this interface. For immunizations, all immunization fields (Start of Vaccine Date, Start of Vaccine Time, Ordering Provider, Administering Provider, Administered Test Code, Administered Test Code System, Procedure (name of vaccine), Amount, Units, Lot Number, Manufacturer Name, Manufacturer Code, Date Time Expiration, Route, Body Site, Order ID, Substance/treatment Refusal, Administration Notes, and Status) are tracked as "add" in the audit log
2. Count of interface transactions

SCRIPT:

1. Go to https://app.procentive.com
2. Log in with credentials: (username) demo.kacton (password) abcd1234
3. Go to the Client Module
4. Find Client 12346342
5. Click on the "Medical" link
6. Go to the "Immunizations" tab
7. Enter date [today's date] and "03:45" for the date and time
8. Select "Kendall Acton" in the "Ordered by," "Entered by," and "Administered by" columns
9. Select "(50) DTaP-Hib" from the code drop-down
10. Type in "Infanrix" under "Vaccine Name"
11. Type in ".5" in the "Amount" text field
12. Select "mL: MilliLiter [SI Volume Units]" from the "Units" drop-down
13. Type in "XXXX" in the "Lot Number" text field
14. Type in "GlaxoSmithKline" in the "Manufacturer" text field
15. Select "Intramuscular" from the "Route" drop-down
16. Select "Right Leg" from the "Site" drop-down
17. Select "Complete" from the "Completion Status" drop-down
18. Click the "Add" button

f(2) Transmission to Public Health Agencies – Syndromic Surveillance

METRICS:

1. Count of user organizations live with this interface and 90% all observation fields (Date Taken, Observation Type, Observation Value, Coding System, Code, Alt Code, Alt Value, Units Type, Notes, Observation Result, and Status) contain all expected data elements
2. Count of interface transactions

SCRIPT:

1. Go to the Syndromic Observation Tab
2. Enter date [today's date]
3. Select "(11450-4) Problem list-Reported [LOINC]" from the "Observation Type" drop-down
4. Select "(SNM) Systemized Nomenclature of Medicine (SNOMED)" from the "Coding System" drop-down.
5. Select "Active" from the "Status" drop-down
6. Type in "125605004" in the "Code" field
7. Type "Test" into the "Notes" text field
8. Select "(F) Final results" in the "Observation Result" drop-down.
9. Click the "Add" button
10. Click "Save"