



The Office of the National Coordinator for
Health Information Technology



Lab Interoperability CoP Full Membership Meeting

Lab Pilots Update

July 24, 2012

Putting the **I** in **HealthIT**
www.HealthIT.gov



- Introducing Lab Interoperability CoP
 - Any questions related to the Lab CoP WG, please send an e-mail to mmcmenamin@deloitte.com
- This meeting is being recorded; please disconnect now if you object.
- HITRC: <http://hitrc-collaborative.org>
 - Contact Brett.Andriesen@hhs.gov for access
- WebEx: Please use interactive features!

Labs Over Direct Toolkit Topic Areas

	Speaker	Outreach and Communication tools	Legal Agreements (BAAs, DUAs, SLAs)	Project Plan Templates	MDN Checklist	Managing your vendors (Requirements)	
Pilot Teams	North Carolina	Keith Scott	<ul style="list-style-type: none"> Factsheet Presentations Website Sales calls Speaking engagements 	<ul style="list-style-type: none"> Contracts and SOWs with Orion and Solstas NC Direct Subscription Users Agreement 	<ul style="list-style-type: none"> Solstas Lab Integration Project Plan V0.4 	<ul style="list-style-type: none"> Orion development trying to get MDN into Aug release, but it come out as a patch in Sept Plan to implement standard email delivery and read receipts for Aug pilot and update using the new MDNs as soon as the update to Rhapsody is release 	<ul style="list-style-type: none"> Design documentation Architecture documents Twice weekly calls
	Florida	Walt Culbertson	<ul style="list-style-type: none"> SharePoint: for document sharing. Harris GoToMeeting for Webex Developing Florida Marketing Plan with Quest, IOS and HMA 	<ul style="list-style-type: none"> FL-HIE Direct Reciprocal Support Agreement FL-HIE, IOS, Quest and HMA Subscription Agreement 	<ul style="list-style-type: none"> Overall Managing to Milestone Dates Quest, IOS and HMA have individual plans 	<ul style="list-style-type: none"> Initial Goto Market Strategy of using affirmative notification Longer term ability to support Lab MDN 	<ul style="list-style-type: none"> FL-HIE Vendor Harris will manage lab partners
	West Virginia	Kathy Moore	<ul style="list-style-type: none"> Partner with your REC WVHIN website 	<ul style="list-style-type: none"> WVHIN subscription agreement www.wvhin.org/wv-direct 	<ul style="list-style-type: none"> Goals, Milestones, Barriers 		
	Alaska	Paul Cartland	<ul style="list-style-type: none"> SharePoint: includes forum, issues, risks Separate meetings pilot partners / different pilot tracks 	<ul style="list-style-type: none"> Direct Secure Messaging (DSM) User Agreement 	<ul style="list-style-type: none"> Basic project plan developed 		

Florida Lab Pilot Team Update

Walt Culbertson

- a. Drive Awareness
- i. Actions
 - 1. Promote FL/M+ Connectivity awareness
 - 2. Promote connectivity value - Identify and clearly articulate key messages, values, and key terms
- ii. Tools
 - 1. Press Release
 - 2. Care360 Broadcast message
 - 3. Other? (FL-HIE, IOS and HMA)

- b. Create Interest in the Services
- i. Actions
 - 1. Support community discussions around needs that Direct solves and present Direct enablement as solution as integrated to EHR
 - 2. Present Care360/DSM/IOS/HMA use cases and associated value
 - 3. Provide demonstration environment and scenarios between Care360, DSM, IOS and HMA
 - 4. Communicate value and pricing

- ii. Tools
 - 1. Webinars
 - 2. E-mail blast in FL highlighting key benefits and features and pricing?
 - 3. Arm sales and marketing with collateral and brochures on product, services, and value associated to HIE connections
 - 4. Feet on the street?
 - 5. Other?

- c. Decision
 - i. Sign-up process
 - ii. Training and training materials specific to Direct together with overall Care360, IOS, and HMA services
- d. Follow through for Adoption and utilization of the services
 - i. Client Account management to ensure adoption and utilization

Florida

Key Milestones

- Finalize lab summit preplan with team by May 23, 2012
- Finalize post-summit plan by June 13, 2012
- Quest HISP in Test by July 1, 2012
- iOS HISP in Test by August 1, 2012
- Production Implementation by September 1, 2012

Key Resources

Florida HIE

- Direct Secure Messaging HISP
- Web Services to receive XD message
- Integration Support staff

Quest Diagnostics Lab & EMR

- Quest Diagnostics HISP
- Automated lab feed for copy of HL7 & pdf of lab report
- Automated interface between Quest HISP & Care360 EMR
- Integration support staff

HMA State Lab

- LIS
- CONNECT GW provided by Florida HIE
- Automated lab feed for copy of HL7 & pdf of lab report
- XDR from CONNECT GW to other HISP
- Integration support staff

iOS Health Systems (EMR)

- iOS HISP
- Automated interface to EMR
- Integration support staff

User Story

Scene 1: HMA Labs receives a paper order from Dr. A for a CBC with request for copy to Dr. B and Dr. C. All three physicians' Direct email addresses are in the order.

HMA labs logs onto DSM, creates new email and attaches the report and addresses it to the three physicians.
Dr. A logs onto DSM and views the new email directly.
Dr. B using Care 360 mailbox views the result and saves in the patients record.
Dr. C using iOS Inbox views the results and saves to chart

Scene 2: Quest Diagnostics Labs receives an order from Dr. A for a CBC with request for copy to Dr. B. The physicians' delivery mode was previously defined as Direct. Both PDF & HL7 results created.

Quest Diagnostics labs automatically sends the reports via their HISP to the two physicians.
Dr. A logs onto DSM and views the new email directly.
Dr. B using iOS Inbox views the results and saves to chart

Scene 3: Quest Diagnostics Labs receives an order from Dr. A for a CBC with request for copy to Dr. B. The physicians' delivery mode was previously defined as Direct. Both PDF & HL7 results created.

Quest Diagnostics labs automatically sends the reports via their HISP to the two physicians.
Dr. A logs onto DSM and views the new email directly.
Dr. B using iOS EHR views the results that have already been saved to chart

Value Proposition

- Standard interface – labs and EMRS can interface via Direct and those providers on the Florida HIE DSM Portal
- Enable exchange of information between ancillary service providers like labs, EMRs and providers
- Automated feeds to remove human in the loop
- Provide an audit trail for both manual and automated lab results & other messages
- Decrease costs and reduced errors in providing copies of lab results in either a structured or unstructured format

Legal Agreements

- Florida HIE DSM Direct Reciprocal Support Agreement (DRESA) for HISP to HISP connections
- Florida HIE DSM Terms of Use and Subscription Agreement for DSM Users
- Quest Diagnostics Terms of Use Agreements for Care360 Users
- iOS Health Systems Terms of Use and Agreements for IOS Users
- HMA State Labs Health Systems Terms of Use Agreements for HMA Users

Open Questions

- Exposing participating HISP provider or participant directories for use by each connected HISP
- Proposed read receipt or other network to network delivery notifications meeting legal and regulatory requirements such as CLIA?
- Implementation of XD* within the proposed timeline
- Alignment of marketing and outreach communications to drive mutual adoption among participating organizations
- Impact of other unknowns TBD

Key Partners

Grantee team (Florida Agency for Healthcare Administration)

Florida HIE - Harris Corporation

Quest Diagnostics Lab & EMR

HMA State Lab

iOS Health Systems

Florida Implementation Scenario Diagram: Manual to Manual

HMA labs logs onto DSM, creates new email and attaches the report created from their LIS and addresses it to the three physicians.



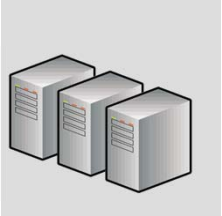
HMA Lab

Edge Protocols



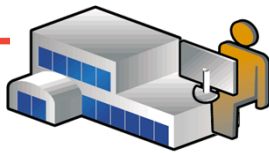
Florida HIE DSM HISP

Direct Backbone SMTP w/ S/MIME



**Quest Diagnostics HISP
IOS Health Systems HISP**

Edge Protocols



Ambulatory Provider(s)

Dr. A logs onto DSM and views the new email directly.
Dr. B using Care 360 mailbox views the result and saves in the patients record.
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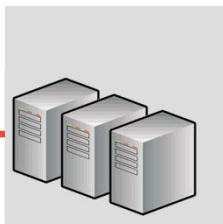
Florida Implementation Scenario Diagram: Automated to Manual

Quest Diagnostics Labs receives an order from Dr. A for a CBC with request for copy to Dr. B. The physicians' delivery mode was previously defined as Direct. Both PDF & HL7 results created.



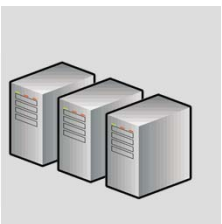
Quest Diagnostics Lab

Edge Protocols



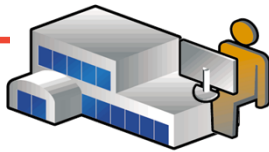
Quest Diagnostics HISP

Direct Backbone SMTP w/ S/MIME



**Florida HIE DSM HISP
IOS Health Systems HISP**

Edge Protocols



Ambulatory Provider(s)

Dr. A logs onto DSM and views the new email directly.
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Florida Implementation Scenario Diagram: Automated to Automated/Manual

Quest Diagnostics Labs receives an order from Dr. A for a CBC with request for copy to Dr. B. The physicians' delivery mode was previously defined as Direct. Both PDF & HL7 results created.



Quest Diagnostics Lab

Edge Protocols



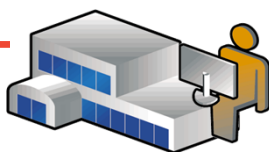
Quest Diagnostics HISP

Direct Backbone SMTP w/ S/MIME



**Florida HIE DSM HISP
IOS Health Systems HISP**

Edge Protocols



Ambulatory Provider(s)

Dr. A logs onto DSM and views the new email directly.
Dr. B using iOS EHR views the results that have already been saved to chart

Alaska Lab Pilot Team Update

Paul Cartland

- External SharePoint site
 - Document Repository
 - Forum specifically for pilot partners
 - Lab Pilot Issues List
 - Lab Pilot Risks List
- AK HIT Program office contracted Cognosante to assist with project management activities for the Lab Pilot including facilitating pilot partner meetings.

- Alaska's pilot partners will or have already signed a Direct Secure Messaging (DSM) Use Agreement.
 - State of Alaska Department of Health and Social Services (DHSS) has signed the DSM agreement, this department-wide agreement include the AK HIT Program office, State lab and other department entities.
 - LaTouche Pediatrics and Anchorage Neighborhood Health Clinic have signed the DSM agreement.
 - Providence is anticipated to sign the DSM agreement in the next few weeks.

- A basic project plan has been developed that will be refined as the Lab Pilot moves forward.

ID	Participant Group	Task Name	Duration	Start	Finish
1	OV, ORION	Project Management	83.13 days	Thu 7/5/12	Tue 10/30/12
2		HIT State Team Meeting	80.13 days	Thu 7/5/12	Thu 10/25/12
20	STATE LAB	Status Meeting with State Lab - ANHC	80.13 days	Tue 7/10/12	Tue 10/30/12
30	PROV	Status Meeting with Providence	80.13 days	Tue 7/10/12	Tue 10/30/12
40	ORION	Status Meeting with AeHN / Orion	80.13 days	Tue 7/10/12	Tue 10/30/12
50	OV, ORION	Establish Issue Management	4 days	Mon 7/9/12	Thu 7/12/12
51		Collect Existing Issues	1 day	Mon 7/9/12	Mon 7/9/12
52		Publish to SharePoint & Distribute	1 day	Tue 7/10/12	Tue 7/10/12
53	OV, ORION	Review Issue List (Team Meeting)	1 day	Wed 7/11/12	Wed 7/11/12
54	OV, ORION	Update Issues	1 day	Thu 7/12/12	Thu 7/12/12
55	OV, ORION	Phase 1 -- Agreements and Requirements	52 days	Fri 5/11/12	Mon 7/23/12
56		Submit One Page Summary	0 days	Fri 5/11/12	Fri 5/11/12
57		Attend Lab Summit	1 day	Wed 5/30/12	Wed 5/30/12
58		Review All Agreements	37 days	Thu 5/31/12	Fri 7/20/12
59		Review All Agreements/Contracts for Regulations Related to Data Retention and Storage	5 days	Mon 7/16/12	Fri 7/20/12
60		Review for Compliance with Direct project "Applicability Statement"	5 days	Mon 7/16/12	Fri 7/20/12
61		Revise/Update Draft Participant Agreements	5 days	Thu 5/31/12	Wed 6/6/12
62	OV, ORION	Requirements Finalization and Sign-off	47 days	Fri 5/18/12	Mon 7/23/12
63	STATE LAB	State Lab Lab - ANHC Pilot	44 days	Fri 5/18/12	Wed 7/18/12
64	STATE LAB	Determine lab results that will be part of the pilot with Anchorage Neighborhood	1 day	Fri 5/18/12	Fri 5/18/12
65	STATE LAB	Prepare strawman workflow	1 day	Wed 7/11/12	Wed 7/11/12
66	STATE LAB	Review strawman workflow and associated legal agreements	5 days	Thu 7/12/12	Wed 7/18/12
67	STATE LAB	Approve strawman workflow and associated legal agreements	0 days	Wed 7/18/12	Wed 7/18/12
68	PROV	Providence Lab -- LaTouche Pediatrics Pilot	44 days	Mon 5/21/12	Thu 7/19/12
69	PROV	Determine labs routinely ordered by LaTouche	0 days	Mon 5/21/12	Mon 5/21/12
70	PROV	Prepare strawman workflow	1 day	Thu 7/12/12	Thu 7/12/12
71	PROV	Review strawman workflow and associated legal agreements	5 days	Fri 7/13/12	Thu 7/19/12
72	PROV	Approve strawman workflow and associated legal agreements	0 days	Thu 7/19/12	Thu 7/19/12
73	ORION	Orion Change Request / Milestones	2 days	Fri 7/20/12	Mon 7/23/12
74	ORION	Review and Finalize Workflows/Requirements with Orion	2 days	Fri 7/20/12	Mon 7/23/12
75	ORION	Develop Draft Change Order/Statement of Work for Orion	2 days	Fri 7/20/12	Mon 7/23/12
76	ORION	Develop SLA for HISP services - must cover delivery notification	2 days	Fri 7/20/12	Mon 7/23/12
77	ORION	Approve Change Request Package and Service Levels	0 days	Fri 7/20/12	Fri 7/20/12
78	OV, ORION	Phase 2 - Development	76 days	Fri 5/11/12	Fri 8/24/12
79	STATE LAB	State Lab Lab - ANHC Pilot	27 days	Thu 7/19/12	Fri 8/24/12
80	STATE LAB	Develop detailed ANHC results receipt workflow	5 days	Thu 7/19/12	Wed 7/25/12
81	STATE LAB	Develop Workflow Details and Configuration Activities	1 day	Thu 7/19/12	Thu 7/19/12
82	STATE LAB	Determine Provider IDs and Direct Addresses for Participation	1 day	Thu 7/19/12	Thu 7/19/12
83	STATE LAB	Onboard Participating Providers	5 days	Thu 7/19/12	Wed 7/25/12

Project Plan

ID	Participant Group	Task Name	Duration	Start	Finish
84	STATE LAB	Develop LIMS functionality to send selected lab results	22 days	Thu 7/26/12	Fri 8/24/12
85	STATE LAB	Select specific HL7 format	1 day	Thu 7/26/12	Thu 7/26/12
86	STATE LAB	Determine if State Lab lab LIMS will interface directly to HIE or through Biztalk hub	1 day	Fri 7/27/12	Fri 7/27/12
87	STATE LAB	Develop HL7 message output	5 days	Mon 7/30/12	Fri 8/3/12
88	STATE LAB	Develop interface from State Lab to HIE (Biztalk)	10 days	Mon 8/6/12	Fri 8/17/12
89	STATE LAB	Implement and test (HL7) routes from State Lab Lab to HIE	5 days	Mon 8/20/12	Fri 8/24/12
90	PROV	Providence Lab - LaTouche Pediatrics Pilot	21 days	Fri 7/20/12	Fri 8/17/12
91	PROV	Develop detailed LaTouche results receipt workflow	5 days	Fri 7/20/12	Thu 7/26/12
92	PROV	Develop Workflow Details and Configuration Activities	1 day	Fri 7/20/12	Fri 7/20/12
93	PROV	Determine Provider IDs and Direct Addresses for Participation	1 day	Fri 7/20/12	Fri 7/20/12
94	PROV	Onboard Participating Providers	5 days	Fri 7/20/12	Thu 7/26/12
95	PROV	Develop LIMS functionality to send selected lab results	16 days	Fri 7/27/12	Fri 8/17/12
96	PROV	Develop Lab Results Reports / PDF or CCD	1 day	Fri 7/27/12	Fri 7/27/12
97	PROV	Develop Direct interface and processes between LIMS and providers	15 days	Mon 7/30/12	Fri 8/17/12
98	ORION	Orion tasks	60 days	Fri 5/11/12	Thu 8/2/12
99	ORION	Upgrade to current versions of Orion software (currently 2 behind)	5 days	Mon 7/16/12	Fri 7/20/12
100	ORION	Develop Message delivery notification functionality	60 days	Fri 5/11/12	Thu 8/2/12
101	ORION	Receive implementation guide	0 days	Fri 5/11/12	Fri 5/11/12
102	ORION	Review implementation guide	5 days	Fri 5/11/12	Thu 5/17/12
103	ORION	Develop notification functionality	30 days	Fri 5/18/12	Thu 6/28/12
104	ORION	Test notification functionality	20 days	Fri 6/29/12	Thu 7/26/12
105	ORION	Release to Production (August)	0 days	Thu 7/26/12	Thu 7/26/12
106	ORION	Upgrade to August release and test in AK	5 days	Fri 7/27/12	Thu 8/2/12
107		Establish Pilot "Measurement" and Reporting Criteria	7 days	Fri 8/3/12	Mon 8/13/12
108		Consolidate Performance Metrics	5 days	Fri 8/3/12	Thu 8/9/12
109		Validate Pilot Outcome Performance Metrics with ONC	1 day	Fri 8/10/12	Fri 8/10/12
110		Establish Reporting Schedule	1 day	Mon 8/13/12	Mon 8/13/12
111	OV, ORION	Milestone: Begin Pilot	0 days	Fri 8/24/12	Fri 8/24/12
112	OV, ORION	Phase 3 - Pilot	49 days	Thu 7/19/12	Tue 9/25/12
113	ORION	Conduct Final Preparations for Pilot	5 days	Mon 8/27/12	Fri 8/31/12
114	ORION	Implement final Rhapsody routes from labs to HIE	1 day	Mon 8/27/12	Mon 8/27/12
115	ORION	Lookup patient on inbound lab data in the EMPI	1 day	Tue 8/28/12	Tue 8/28/12
116	ORION	Load HL7 into CDR for patient from EMPI lookup	1 day	Wed 8/29/12	Wed 8/29/12
117	ORION	Create Rhapsody lookup of provider ID to Direct addresses in Portal user profile	1 day	Thu 8/30/12	Thu 8/30/12
118	ORION	Create outbound Direct email route in Rhapsody, attaching PDF and HL7	1 day	Fri 8/31/12	Fri 8/31/12
119	STATE LAB	State Lab Lab - ANHC Pilot	43 days	Thu 7/19/12	Mon 9/17/12
120	STATE LAB	Create HIE account for Lab	1 day	Thu 7/19/12	Thu 7/19/12
121	STATE LAB	Send test results to HIE	3 days	Mon 9/3/12	Wed 9/5/12
122	STATE LAB	Validate presentation of test results in HIE portal	1 day	Thu 9/6/12	Thu 9/6/12

Project Plan

123	123	STATE LAB	Validate test results sent to ANHC	1 day	Fri 9/7/12	Fri 9/7/12
124	124	STATE LAB	Send live results	5 days	Mon 9/10/12	Fri 9/14/12
125	125	STATE LAB	Validate against paper results	1 day	Mon 9/17/12	Mon 9/17/12
126	126	PROV	<input type="checkbox"/> Providence Lab - LaTouche Pediatrics Pilot	43 days	Fri 7/20/12	Tue 9/18/12
127	127	PROV	Create HIE account for Lab	1 day	Fri 7/20/12	Fri 7/20/12
128	128	PROV	Send test results to PCP via Direct	3 days	Mon 9/3/12	Wed 9/5/12
129	129	PROV	Validate presentation of test results	1 day	Thu 9/6/12	Thu 9/6/12
130	130	PROV	Develop Allscripts functionality to receive results via Direct	1 day	Fri 9/7/12	Fri 9/7/12
131	131	PROV	Validate receipt of test results	1 day	Mon 9/10/12	Mon 9/10/12
132	132	PROV	Send live results	5 days	Tue 9/11/12	Mon 9/17/12
133	133	PROV	Validate against paper results	1 day	Tue 9/18/12	Tue 9/18/12
134	134	OV, ORION	Review Pilot Outcomes Against Performance Metrics (ONC)	5 days	Wed 9/19/12	Tue 9/25/12
135	135	OV, ORION	Lab Pilot Final Report	0 days	Tue 9/25/12	Tue 9/25/12
136	136		<input type="checkbox"/> Phase 4 - Pilot close out	5 days	Wed 9/26/12	Tue 10/2/12
137	137		Capture lessons learned	5 days	Wed 9/26/12	Tue 10/2/12
138	138		Lessons Learned Report	0 days	Tue 10/2/12	Tue 10/2/12

West Virginia Lab Pilot Team Update

Kathy Moore

- WVHIN website, REC/WVHIN hosted webinars, conferences, presentations meetings
- Publicize Direct through REC & association newsletters
- Identify potential Direct users for lab through analyzing lab communication partners and REC customer database
- Utilize REC representatives for “boots on the ground the ground” education and training

- **WVDirect Subscription Agreement/BAA**
 - Overview of WVDirect
 - Member Organization Information
 - Terms & Conditions
 - Security Best Practices
- **Registration Requirements**
 - Individual
 - Organization

- Identify goals and milestones upfront
 - Ensure team understands and is onboard with goals and milestones
- Identify barriers and risk mitigation strategies
 - With many players involved, be conscious that you will encounter delays/barriers and allocate time accordingly

- Technical
 - Grafton Hospital Lab issued Direct Address
 - Orchard generated PDF report from LIS
 - In process of creating account for Orchard LIS
 - Explored use of MDN as it relates to pilot project
- Beyond the Technical
 - Actively recruiting Preston Taylor to sign up for Direct (Grafton Lab Director is leveraging existing relationship with Preston Taylor)

Guam/Hawaii Lab Pilot Team Update

Francis Chan

Guam and Hawai'i

Key Milestones

7/30/2012 – Plan and timeline finalized for HISP to HISP connectivity.
7/31/2012 – Completion of legal agreements.
8/15/2012 – Testing for HISP to HISP connectivity.
9/5/2012 – HISP to HISP connectivity go-live.

Key Resources

1. ApeniMED HISP interface
2. Medicity HISP interface

User Story

1. Guam PCP receives lab reports as attachments via the Guam HIE Direct Portal.
2. The lab reports indicate a condition that leads to a referral to a Hawaii provider.
3. The referral and lab reports are sent to Hawaii using Direct and the HISP to HISP connection.
4. The Hawaii provider treats the patient.
5. The patient discharge report and related documents are sent to the Guam PCP Direct.

Value Proposition

1. HISP to HISP connectivity facilitates fast, secure coordination of care through transmission of referrals, lab results and related documentation throughout the Pacific.

Legal Agreements

1. Business Associate Agreements between providers and their respective HIEs
2. Data sharing agreement between the Guam and Hawaii HIEs

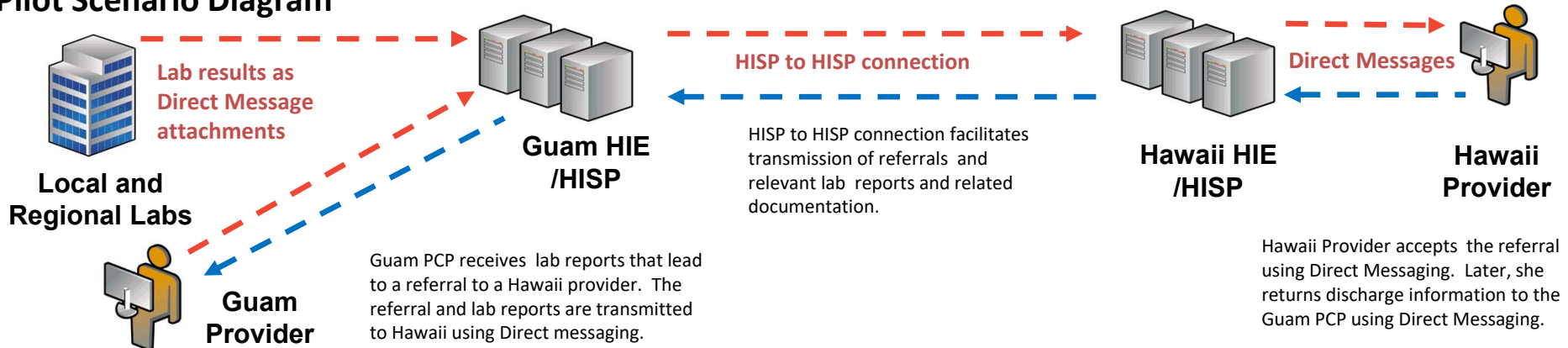
Open Questions

1. Provider discovery
2. EHR integration

Key Partners

1. Guam HIE
2. Hawaii HIE
3. Guam providers
4. Hawaii providers
5. Medicity (The Hawaii HIE/HISP technical vendor)
6. ApeniMED (The Guam HIE/HISP technical vendor)

Pilot Scenario Diagram



North Carolina Lab Pilot Team Update

Keith Scott

- Application for Certificate of Authority
 - NC DIRECT One-Pager
 - NC DIRECT Subscription Agreement Template
 - HIPAA Privacy and Security Rules
- NC Direct Application
- NC HIE Website
- Orion Health's Website

- Presentations
 - Included in HIE presentation
 - *Stand-alone* Direct presentation
- Giving NC PATH participants a free mailbox
- Targeting local Health Departments