

Trinity EHR – Real World Testing Results - 2022

General Information

Developer: DataLink Software, LLC

Software Name & Version: Trinity 3.0

CHPL Product Number: 15.04.04.2895.Trin.03.00.1.190611

Real World Testing Link: <https://datalinksoftware.com/solutions/trinity-ehr-version-information/>

Real World Testing Strategy

We want to ensure that our Providers and their Patients always have access to their data. Our testing approach will consist of coordination between DataLink and one of our users of Trinity to ensure we not only meet certification criteria, but also their workflow needs. Our test plan was put together based on actual scenarios used within an Ambulatory care setting, more specifically Family Medicine as that covers our current client base. The test strategy was developed to ensure all measures are accounted for with expected outcomes for all measures documented.

UPDATE: DataLink updated their approach to collecting real world testing results, from “App Insights” and Client Surveys, to a more impactful approach of trigger-based SQL database query results based on Trinity EHR user workflows and habits. As well as an updated audit log experience slated for full release in Q1 2023 (see Key Milestones), which will allow for a more automated way to track and view user interactions within our EHR to ensure compliance to certified health IT functionality, and that we are meeting the expected & required outcomes. Our change in approach was based on the following factors:

- As noted in our Key Milestones for 2022 Real World Test Plans, deployment of App Insights for tracking key metrics was expected in Q2/Q3 – 2022 with our Roll-out of Client Surveys expected in Q3/Q4 – 2022. App Insights, once deployed and results reviewed, was realized it did not track the necessary workflows and trigger points to provide valuable or insightful real world testing results. While we did spend many hours with our Trinity EHR users reviewing workflows, we were not successful in getting traction to our client surveys and that approach was no longer valuable or insightful.
- The impact to our change of approach did not disrupt our ability to track metrics and document results of our certified health IT functionality. The change allows for a more valuable and insightful approach to real world testing which we will continue to enhance and evolve to ensure we are assuring compliance and ensuring our users and their patients have access to the data they need on demand and in a meaningful way.
- There were several lessons learned from our initial approach of tracking key metrics as well as the usability of our application. Based on metrics, we were able to see the most used portions of

our application, as well as the least used sections of our application. With some of those sections surrounding certified functionality, we took the opportunity to enhance our product and user experience throughout 2022 as well as promote less-used portions of our EHR platform through user experience sessions, client facing documentation, and push notifications built into Trinity EHR. See each section for more details on specifics on each measure and our approach to collecting results.

- Trinity EHR metrics should be considered with the Provider & User counts of our Trinity EHR
 - Provider Count as of 12/31/2022 – 45
 - Patient Count as of 12/31/2022 – 351,400

Real World Testing Results

Measure: 170.315(b)(1) – Transitions of Care

Measure: 170.315(b)(2) – Clinical Information Reconciliation & Incorporation

Measure: 170.315(e)(1) – View, Download, and Transmit to Third Party

Measure: 170.315(h)(1) – Direct Project

Standards Updates:

- All standards versions are those specified in USCDI v1
- SVAP – Not Applicable

Care Setting:

- Ambulatory – Family Medicine

Results:

1. Provider notes signed/completed in 2022 = 319,659 which captures the number of CCDA's that were generated by our Providers.
 - a. This metric shows that our Providers can properly document their clinical findings and generate a CCDA which they can then transmit to another provider via Direct Messaging or another secure method of transport.
2. Of the 351,400 patients seen by Trinity EHR Providers, 35,170 of those patients had at least one referral generated which captures the opportunities our Providers would have had to view, download, & transmit their patients progress note, transfer summary, or other CCDA note type.
 - a. With the updates to our audit log experience in Q1 2023 (see Key Milestones), we will be able to better track the types of CCDA's generated such as Referral Note, Progress Note, or Transfer Summary which will ensure our application is allowing for generation of all required CCDA note templates.
3. Trinity EHR does not currently have any Providers using Direct Messaging within our application; however, the functionality does exist and is a part of our new approach to promoting less-used portions of our application.
 - a. Our Direct Messaging service does require the use of relied upon software: EMR Direct phiMail.

4. The Trinity EHR Reconciliation module did not track any user activity. Updates to reconciliation error messaging are expected in Q1 2023 (see Key Milestones). Due to this, DataLink internally tested the reconciliation of multiple test CCD's into our EHR for a test patient, which resulted in successful ability to reconcile allergies, medications, & problems into the test patient charts within Trinity EHR.
5. CCD documents generated by Trinity EHR were tested against C-CDA 2.1 validator for 2015 Edition and conform to the required sections and code sets.

Measure: 170.315(b)(6) – Data Export

Standards Updates:

- All standards versions are those specified in USCDI v1
- SVAP – Not Applicable

Care Setting:

- Ambulatory – Family Medicine

Results:

1. Our tracking indicated no user activity of our CCD Bulk Export functionality. While we did have a handful of Providers transition from Trinity to another EHR platform, they opted for a full SQL database export as well as PDF exports of client documentation and provider notes.
2. Internal testing resulted in successful ability to export one patient, multiple patients, or all patient CCD's in the required format should the CCD need to be reconciled into another EHR system.
3. CCD documents generated by Trinity EHR were tested against C-CDA 2.1 validator for 2015 Edition and conform to the required sections and code sets.

Measure: 170.315(f)(1) – Transmission to Immunization Registries

Standards Updates:

- All standards versions are those specified in USCDI v1
- SVAP – Not Applicable

Care Setting:

- Ambulatory – Family Medicine

Results:

1. Trinity EHR Providers recorded approximately 8,427 immunization records available for HL7 generation.
2. Updates to the audit log experience will allow for better visibility into administered, versus recorded immunizations, and views into real time alerts when HL7 generation is achieved or not achieved.

Measure: 170.315(g)(7) – Application Access – patient selection

Measure: 170.315(g)(8) – Application Access – data category request

Measure: 170.315(g)(9) – Application Access – all data request

Standards Updates:

- All standards versions are those specified in USCDI v1
- SVAP – Not Applicable

Care Setting:

- Ambulatory – Family Medicine

Results: (see updated change of approach to collecting real world testing results)

1. Our tracking indicated no user activity of our patient selection, data category request, or all data request APIs. These APIs require provider and patient engagement to our Patient Portal. Over the course of 2022, DataLink has conducted several user experience sessions surrounding our patient portal in hopes that we can promote more adoption and useability. These sessions resulted in new feature requests and additions to our patient portal functionality. Updates are expected in Q1 2023 (see Key Milestones)
2. Internal testing using Postman application (Version 3.21.24) and test patients, API calls were successful on:
 - a. Patient selection – Presented with Patient ID to use in further API calls
 - b. Data category request – Presented with XML which included the category or categories requested with API call. XML data presented was within the specific date/time period noted in body of API call.
 - c. All Data Request – Presented with XML which included all data categories requested with API call. XML data presented was within the specific date/time period noted in body of API call.

Key Milestones

- a. App Insights deployed – Q3 2022
- b. Updates to reconciliation error messaging – Q1 2023
- c. Updates to audit log tracking & experience – Q1 2023
- d. Updates to patient portal – Q1 2023