	Passed **Passed**	**Care Coordination**			
	☐ ☐ ☐	§ 170.315(b)(1) Transitions of care § 170.315(b)(2) Clinical information reconciliation and incorporation § 170.315(b)(6) Data export			
		Application Programming Interfaces			
	☐	§ 170.315(g)(7) Application access— patient selection			
	☐	§ 170.315(g)(8) Application access— data category request			
	☐	§ 170.315(g)(9) Application access— all data request			
		Electronic Exchange			
	Passed				
	☐	§ 170.315(h)(1) Direct Project			
		Plan Report ID Number 20211018WEL			

Criteria	Care Setting	Measurement Period			Date		Key Milestones
Care Coordination							
§ 170.315(b)(1) Transitions of care § 170.315(h)(1) Direct Project: from the Electronic Exchange Category	Ambulatory	3/1/2022	-	6/1/2022	May, 2022	☐	• Confirm Trading Partner • Confirm ability to send and receive clinical documents • Confirm with TP that production data will be used, whether in an actual live environment or a copy of a live environment
					June, 2022	☐ ☐	• Care provider selects recipient from directory of Direct addresses and initiates sending of Clinical Document. The user is able to create a C-CDA Release 2.1 that also includes the reason for referral, and the referring or transitioning provider's name and office contact information. • C-CDA Care Referral or Referral Note is triggered to send via Direct Protocol • Care provider reviews the Direct Status screen (under Direct Outgoing menu choice) to ensure Clinical Document was successfully transmitted.
					June, 2022		Recipient uses scorecard to grade C-CDA
					July, 2022	☐ ☐ ☐	• Tester uses Document Center to locate Clinical Document. • Care provider reviews the Direct Status screen (under Direct Outgoing menu choice). • Recipient validates that Social History section of C-CDA is flagged as restricted
					August, 2022		Calculate and compile metrics
§ 170.315(b)(2) Clinical information reconciliation and incorporation	Ambulatory	3/1/2022	-	6/1/2022	May, 2022		Import live patient data
					June, 2022	☐ ☐	Confirm role access limits Verify imported patient data to existing patient match
					July, 2022	☐	Reconcile imported allergy, medication, and problem data with existing data
					August, 2022	☐	Calculate and compile metrics
§ 170.315(b)(6) Data export	Ambulatory	3/1/2022	-	6/1/2022	Start test plan execution: May, 2022	☐	
					June, 2022		Use the Edge Test Tool to check validity of output file
					July, 2022		Export summary was created and completed successfully
					Complete test execution: August, 2022		Calculate and compile metrics
Application Programming Interfaces							
§ 170.315(g)(7) Application access— patient selection § 170.315(g)(8) Application access— data category request § 170.315(g)(9) Application access— all data request	Ambulatory	3/1/2022	-	6/1/2022	May, 2022	☐ ☐	• Partner with PHR or identify existing PHR that can receive patient clinical data as described in this RWT plan. • Ensure that PHR has functionality to access the Dynamic FHIR API, as described here. • Partner with EHR that is integrated with the Dynamic FHIR API and Patient Portal modules of ConnectEHR.
					June, 2022	☐	Encounter is created and visually confirmed
					July, 2022	☐ ☐	• Dynamic FHIR API has transformed C-CDA into FHIR resources. • PHR app consumes FHIR resources to populate EHR data
					July, 2022		Visually validate Assessment, Plan of Treatment and Health Concerns narrative text
					August, 2022		
Electronic Exchange							
§ 170.315(h)(1) Direct Project (Included with (b)(1),(b)(7),(b)(8) in the CareCoordination Category)	Ambulatory	3/1/2022	-	6/1/2022	SEE CARE COORDINATION		SEE CARE COORDINATION

Table of Contents Link	**Associated Certification Criteria:** **§ 170.315(b)(1) Transition of Care (Cures Update)** **§ 170.315(h)(1) Direct Project**					
	Measure Description:**Send and receive Transition of Care (TOC) messages with other providers to close the referral loop. The patient's ePHI will be exchanged using a C-CDA 2.1 Care Referral or Referral Note and DIRECT secure messaging for data transport.**	Justification:**We chose to concentrate on the aspects of this criterion that would:1) showcase ConnectEHR's streamlined approach to provider-to-provider patient referrals and transitions of care with the ultimate goal being higher quality patient care2) eliminate as much risk of data entry errors as possible by transmitting patient data securely and electronically rather than relying on manual data entry for referrals3) reduce the overall time burden of manual data entry4) ensure private and secure transmission of patients' PHI5) result in increased interoperability between disparate HIT systems.**					
	Metric Description: **1) 100 percent of outbound TOC's successfully received by HISP** **2) Average C-CDA grade from scorecard for C-CDAs generated from ConnectEHR is a "C" or better** **3) 75 percent of C-CDAs flagged as restricted were received in restricted status based on confirmed receipt from trading partner** **4) 75 percent of trading partner's TOC C-CDAs successfully received by ConnectEHR.**		Standards Implemented: (SVAP) **• USCDIv1 July 2020 Errata** **• Applicability Statement for Secure Health Transport, Version 1.2, August 2015 (Direct)** **• HL7 C-CDA R2.1 Implementation Guide, October 2019. CDAR2_IG_C-CDAA_CLINNOTES_R1_DSTU2.1_2015AUG_2019JUNwith_errata** **•HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 1 - Introductory Material, Release 2.1, August 2015** **•HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 2 - Templates and Supporting Material, Release 2.1, August 2015** **•HL7 Implementation Guide for CDA® Release 2: IHE Health Story Consolidation, DSTU Release 1.1 (US Realm) Draft Standard for Trial Use July 2012** **•ONC Implementation Guide for Direct Edge Protocols, Version 1.1, June 25, 2014** **• HL7® CDA R2 Implementation Guide: C-CDA Templates for Clinical Notes R2.1 Companion Guide, Release 2-US Realm, October 2019**				
	Developer Info: **Welligent, part of ContinuumCloud 100 S Ashley Drive, Suite 1500** **Tampa, FL 33602** Care Setting: **Ambulatory care**	Product Info: **Welligent 8MU** CHPL ID: **15.02.02.2536.A110.01.00.1.200221**	Methods Use to Demonstrate Interoperability: **1) HISP via Direct Protocol (SMTP)** **2) HIE exchange** **3) HTTPS via secure provider portal**				
Test Step:	**Testing Procedure:**	**Expected Outcomes:**	**Key Milestone Date:**	**Key Milestone:**	**Outcomes:**	**Comments:**
1	Identify Trading Partner (TP) and coordinate with TP for sending/receiving clinical documents using production data as described in this RWT plan.	• Confirm Trading Partner • Confirm ability to send and receive clinical documents • Confirm with TP that production data will be used, whether in an actual live environment or a copy of a live environment		☐		
2	Patient A has encounter with care provider and data is captured in EHR	• USCDIv1 data elements captured in EHR (system under test) • Care provider selects Clinical Document to be transmitted. • Care provider is able to create a C- CDA Release 2.1 that also includes the reason for referral, and the referring or transitioning provider's name and office contact information. • Care provider flags the document as restricted and subject to restrictions on re-disclosure.	May, 2022	☐		
3	Care provider initiates TOC to TP EHR in EHR	• Care provider selects recipient from directory of Direct addresses and initiates sending of Clinical Document. The user is able to create a C-CDA Release 2.1 that also includes the reason for referral, and the referring or transitioning provider's name and office contact information. • C-CDA Care Referral or Referral Note is triggered to send via Direct Protocol • Care provider reviews the Direct Status screen (under Direct Outgoing menu choice) to ensure Clinical Document was successfully transmitted.	June, 2022			
			☐			
4	Validate that C-CDA for Patient A contains USCDIv1 data elements.	Recipient uses scorecard to grade C- CDA	June, 2022	☐		
5	Trading partner refers Patient B from TP EHR to system under test by generating C-CDA Clinical Document or Referral Note.	• Care provider flags Social History section of C-CDA as restricted. • Care provider selects recipient from directory of Direct addresses and initiates sending of Clinical Document.				
6	In system under test, tester acknowledges receipt of valid Clinical Document.	• Tester uses Document Center to locate Clinical Document. • Care provider reviews the Direct Status screen (under Direct Outgoing menu choice). • Recipient validates that Social History section of C-CDA is flagged as restricted	July, 2022			
7	Calculate and compile metrics		August, 2022	☐		
	Attestation: **This Real World Testing plan is complete with all required elements, including measures that address all certification criteria and care settings. All information in this plan is up to date and fully addresses the Health IT Developer's Real World Testing requirements.**					
	Authorized Representative Name: Charles Sutelan Authorized Representative Email: csutelan@continuumcloud.com Authorized Representative Phone: 757-213-5970 Authorized Representative Signature: Charles Sutelan Date: 10/11/2021					

Table of Contents	§ 170.315(b)(2) Clinical information reconciliation and incorporation				
	Measure Description: **Reconcile and incorporate specific information from C-CDAs formatted to both C-CDA Releases 1.1 and 2.1.** **• Demographics for patient matching** **• Problems** **• Medication** **• Allergies**	**Justification:** **We chose to concentrate on the aspects of this criterion that would:** **1. Demonstrate Welligent's ability to match received patient data properly to the correct patient** **2. Demonstrate the user's ability to reconcile patient medications, allergies, and problem lists to the patient's record**		**Associated Certification Criteria:** **§ 170.315(b)(2) Clinical information reconciliation and incorporation**	
	Metric Description: **1. 100 Percent of patient data is able to be matched to an existing patient.** **2. Data is able to be reconcilled with data for existing patient.**			**Standards Implemented: (SVAP)** **• HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 1 - Introductory Material, Release 2.1, August 2015** **•HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 2 - Templates and Supporting Material, Release 2.1, August 2015**	
	Developer Info: **Welligent, part of ContinuumCloud 100 S Ashley Drive, Suite 1500 Tampa, FL 33602** **Care Setting: Ambulatory care**	**Product Info: Welligent 8MU** **CHPL ID: 15.02.02.2536.A110.01.00.1.200221** ☐		**Methods Use to Demonstrate Interoperability:** **1. Visual validation of patient match** **2. Visual validation of ability to reconcile data.**	
		☐			

Test Step:	Testing Procedure:	Expected Outcomes:	Key Milestone Date:	Key Milestone:	Outcomes:	Comment(s):
1	Using production data in an actual live environment or copy of live environment, demonstrate the ability to import medication, allergy, and problem data for a specified client.	•Specified client can be selected through the UL. •Medicaton, allergy, and problem data is sent through UL.	Start test plan execution: May, 2022	☐		
2	Demonstrate the ability to limit the set of users who can import data.	Logging in as a User with Admin Profile will allow data to be imported.				
3	Confirm users roles that have been denied import access cannot create import summaries	Logging in as a User with a Non-Admin Profile will not allow access to the export functionality				
4	Verify imported client information matches existing patient in Welligent.	Match the client demographic information to an existing client	June, 2022			
5	Reconcile the medication data imported with medications for the existing patient	Visually verify through a single view which medications match those existing in Welligent for the specific patient and those which do not				
6	Reconcile the allergy data imported with allergy data for the existing patient	Visually verify through a single view which allergies match those existing in Welligent for the specific patient and those which do not	July, 2022			
7	Reconcile the problem data imported with problem data for the existing patient	Visually verify through a single view which medications match those existing in Welligent for the specific patient and those which do not				
8	Calculate and compile metrics		Complete test execution: August, 2022	☐		

Attestation:
This Real World Testing plan is complete with all required elements, including measures that address all certification criteria and care settings. All information in this plan is up to date and fully addresses the Health IT Developer's Real World Testing requirements.

Authorized Representative Name: Charles Sutelan
Authorized Representative Email: csutelan@continuumcloud.com
Authorized Representative Phone: 757-213-5970
Authorized Representative Signature: Charles Sutelan
Date: 10/11/2021

Table of Contents	Associated Certification Criteria: § 170.315(b)(6) - Data export					
	Measure Description: **Export all available data elements from the Common Clinical Dataset (CCDS) for a population of patients for use in a different health information technology product or a third party system. This export can be used for many purposes, including data portability when a physician practice switches to a new EHR platform.**	**Justification:** **We chose to concentrate on the aspects of this criterion that would:** **1) demonstrate ConnectEHR's ability to export batches of patient data in a straightforward fashion** **2) facilitate interoperability by providing the exported data in the form of valid CCD files that conform to the HL7 standards as described in the HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm).**				
	Metric Description: **1) 100 Percent of Exports ran at the correct time.** **2) C-CDA count matches actual patient count for requested date range.** **3) Spot-checked C-CDAs pass scorecard with average overall grade of "C" or better.**		**Standards Implemented: (SVAP)** **• HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 1 - Introductory Material, Release 2.1, August 2015** **•HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 2 - Templates and Supporting Material, Release 2.1, August 2015**			
	Developer Info: **Welligent, part of ContinuumCloud 100 S Ashley Drive, Suite 1500 Tampa, FL 33602** **Care Setting: Ambulatory care**	**Product Info: Welligent 8MU** **CHPL ID: 15.02.02.2536.A110.01.00.1.200221**	**Methods Use to Demonstrate Interoperability:** **1) Visual validation/counting** **2) Test output file with C-CDA scorecard to ensure correct format/contents.** ☐			

Test Step:	Testing Procedure:	Expected Outcomes:	Key Milestone Date:	Key Milestone:	Outcomes:	Comment(s):
1	Using production data in an actual live environment or copy of live environment, demonstrate the ability to configure data export configurations for Timeframe and Location	• Date and time ranges can be configurable via the UI • Targeted Practices can be configurable via the UI • Patients exported can be configurable via the UI	Start test plan execution: May, 2022	☐		
2	Demonstrate the ability to limit the set of users who can create export summaries	Logging in as a VendorAdmin will allow access to the export functionality				
3	Confirm users roles that have been denied export summary access cannot create export summaries	Logging in as a non-VendorAdmin will not allow access to the export functionality				
4	Create and validate an export for a single patient	Use the Edge Test Tool to check validity of output file	June, 2022			
5	Create an export summary for data within a entered date and time range	• Data was available for the entered date and time range • The export summary contained data only within that date and time range				
6	Create an export summary in real time	Export summary was created and completed successfully	July, 2022	☐		
7	Create an export summary based on a relative date and time (Ex. Every first of every month @ 7 AM)	The scheduled export summary would be display and be visually validated				
8	Create an export summary for a specific date/time (Ex. 07/16/2021 @ 3:30 PM)	• The scheduled export summary was created successfully • The specific date/time would be in the near future so the export could be confirmed				
9	Save the export summary to a preferred location at the time of export.	• Saving to a preferred location is allowed • Visually confirming the export after save is performed and successful				
10	Calculate and compile metrics		Complete test execution: August, 2022	☐		

Attestation:
This Real World Testing plan is complete with all required elements, including measures that address all certification criteria and care settings. All information in this plan is up to date and fully addresses the Health IT Developer's Real World Testing requirements.

Authorized Representative Name: Charles Sutelan
Authorized Representative Email: csutelan@continuumcloud.com
Authorized Representative Phone: 757-213-5970
Authorized Representative Signature: Charles Sutelan
Date: 10/11/2021

Table of Contents

Associated Certification Criteria:
§ 170.315(g)(7) Application access— patient selection
§ 170.315(g)(8) Application access— data category request
§ 170.315(g)(9) Application access— all data request

Measure Description:
Enable a patient's to access their electronic health data through a Personal Health Record (PHR) app on their smartphone. They have had a healthcare encounter with a provider using an EHR that is integrated with the Dynamic FHIR API and Patient Portal modules of ConnectEHR. They would like to view the results from that encounter along with the rest of their electronic health record.

Justification:
CMS has a focus on empowering patients by providing them with an electronic copy of their health record. We agree that this is very important for patient satisfaction and improving population health in general.

Metric Description:1) Patient is able to retrieve FHIR API data from PHR app for 100 percent of encounters.2) In 100 percent of encounters from Step #1, PHR data matches data from EHR. This will be confirmed by visual validation of the following FHIR resources:• Demographics• Problems• Medications• Allergies

Standards Implemented: (SVAP)**• HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 1 - Introductory Material, Release 2.1, August 2015• HL7 Implementation Guide for CDA® Release 2: Consolidated CDA Templates for Clinical Notes (US Realm), Draft Standard for Trial Use, Volume 2 - Templates and Supporting Material, Release 2.1, August 2015• FHIR STU3• FHIR R4**

Developer Info:
Welligent, part of ContinuumCloud 100 S Ashley Drive, Suite 1500
Tampa, FL 33602

Product Info: Welligent 8MU
CHPL ID: 15.02.02.2536.A110.
01.00.1.200221

Methods Use to Demonstrate Interoperability:
1) HTTPS via secure portal
2) FHIR

Care Setting: **Ambulatory care**

Test Step:	Testing Procedure:	Expected Outcomes:	Key Milestone Date:	Key Milestone:	Outcomes:	Comment(s)
1	Identify Trading Partner (TP) and coordinate with TP for providing patients timely access to their ePHI using production data as described in this RWT plan.	• Partner with PHR or identify existing PHR that can receive patient clinical data as described in this RWT plan. • Ensure that PHR has functionality to access the Dynamic FHIR API, as described here. • Partner with EHR that is integrated with the Dynamic FHIR API and Patient Portal modules of ConnectEHR.	May, 2022	☐		
2	Patient A has encounter with care provider who uses EHR described above.	Encounter is created and visually confirmed	June, 2022	☐		
3	Provider captures USCDIv1 data elements in EHR	USCDIv1 data elements are validated in the system	☐			
4	Provider manually generates Care/Referral Summary C-CDA post-visit or ensures that the EHR generates one automatically.	C-CDA is confirmed for the specified patient				
5	Patient A uses Dynamic Patient Portal login to view clinical information	• Patient Portal automatically sends email reminder that Patient A has a new clinical document available. • Email reminder has a URL/hyperlink to the patient portal. • If patient hasn't already activated their portal account, portal account can be activated via Welcome Email or by an Administrator user				
6	Patient A uses portal login credentials to log into PHR app	Specific patient ID and token are returned for authentication and data requests				
7	PHR app displays full set of data for all data categories	• Dynamic FHIR API has transformed C-CDA into FHIR resources. • PHR app consumes FHIR resources to populate EHR data	July, 2022			
8	PHR app returns full set of data for a given category	PHR app will display and all data to be displayed for each data category				
9	PHR app returns data in a computable format using specified standards.	Data is confirmed to be in XML or JSON format				
10	PHR app returns full and accurate data for a specific date and specific date range	• Step 10 is optional, if PHR app has the capability to filter by date range • Filtering data by a specific date returns data accurately and as expected • Filtering data by a specific date range returns data accurately and as expected				
11	Via visual inspection of PHR app, the data is verified to include Assessment, Plan of Treatment and Health concerns are specified as narrative text	Visually validate Assessment, Plan of Treatment and Health Concerns narrative text	July, 2022	☐		
12	Calculate and compile metrics		August, 2022	☐		

Attestation:
This Real World Testing plan is complete with all required elements, including measures that address all certification criteria and care settings. All information in this plan is up to date and fully addresses the Health IT Developer's Real World Testing requirements.

Authorized Representative Name: Charles Sutelan
Authorized Representative Email: csutelan@continuumcloud.com
Authorized Representative Phone: 757-213-5970
Authorized Representative Signature: Charles Sutelan
Date: 10/11/2021