EMR Certification

Interprofessional Team Data Extract Specification

March 31, 2020

Version 1.1

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1   Introduction

The purpose of this document is to provide an overview of the Interprofessional Team Data Extract. The document will describe the technical details and requirements regarding the documentation of encounters with non-physician providers and extraction of data.

1.1   Glossary

The following defines key business terms and acronyms used throughout this document.

Table 1: Terms and Acronyms

TERM OR ACRONYM	DEFINITION
Client	A client is an individual seeking and receiving health-care services. May be interchanged with term "patient".
Interprofessional Team Demonstration Initiative (ITDI)	A Manitoba primary care initiative in support of the Family Doctor for All commitment.
Manitoba Certified EMR Product (EMR)	An Electronic Medical Record product that has achieved Certification in Manitoba, and is referred to throughout this document as "EMR".

1.2   Business Objectives & Benefits Summary

The Interprofessional Team Demonstration Initiative (ITDI) is a Manitoba primary care initiative in support of the Family Doctor Finder commitment. Family Doctor Finder can make it easier for Manitobans to find a team of healthcare professionals (including family doctors and/or nurse practitioners) within Home Clinics to provide a home base for their health care needs. As a key strategy supporting this commitment, ITDI provides funding to fee-for-service practices to hire non-physician resources (e.g. physician assistant, nurse, nurse practitioner and others). These resources become part of the interprofessional team within the Home Clinic, thereby increasing the number of patients provided ongoing care through that practice.

The Interprofessional Team Data Extract (ITDE) extracts data from Certified EMR Products which can be submitted to Manitoba Health, Seniors and Active Living (MHSAL). This enables evaluation of ITDI and the scope of care provided by interprofessional teams.

1.3   Related Documents

This document references the following companion documents:

Table 2: Related Documents

DOCUMENT
Manitoba EMR Certification - Baseline EMR Requirements Specification
Interprofessional Team Data Extract Assessment Guide

2   Interprofessional Team Data Extract Overview

Key solution features in scope include:

- Documentation of encounters with non-physician providers
- Interprofessional team data extract generation

3   Interprofessional Team Data Extract Use Cases

The use cases in this section describe functionality required of the EMR product. They are supported by the requirements detailed in this specification.
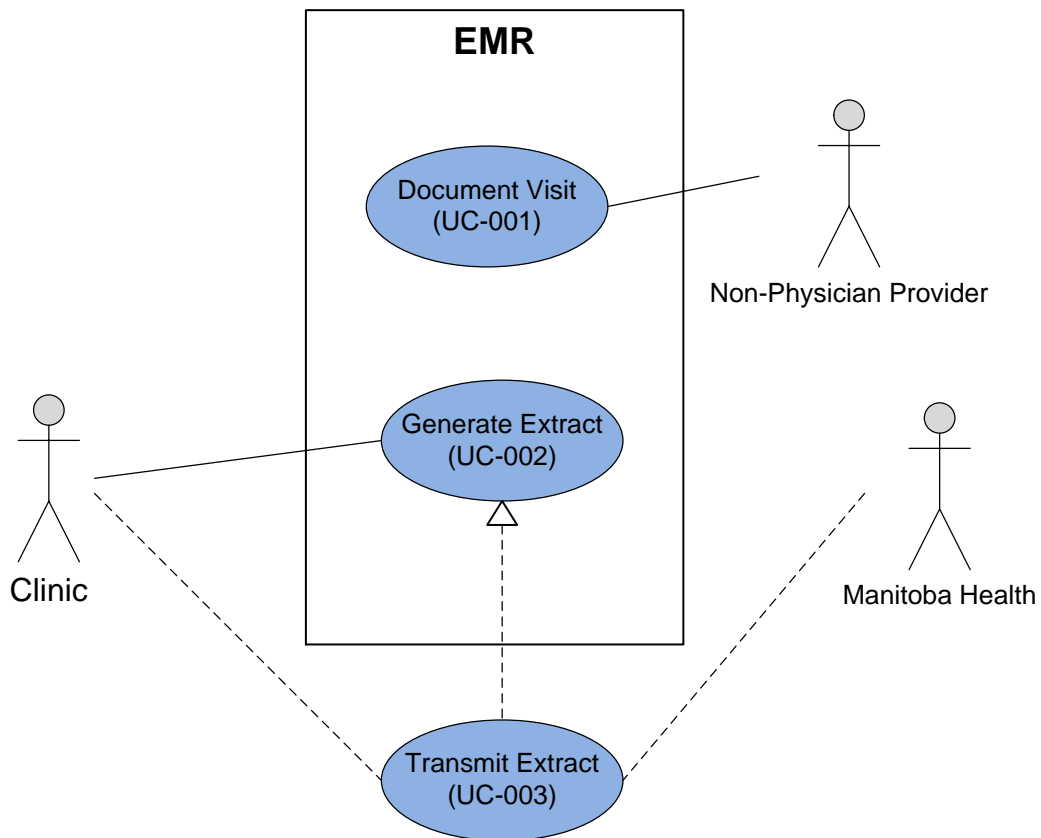

FIGURE 1: HIGH-LEVEL USE CASES

3.1 Document Visit (UC-001)

This use case describes the process to document a visit.

PRIMARY ACTORS
• EMR • Non-Physician Provider
TRIGGER(S)
• A Client arrives and is scheduled to see a Non-Physician Provider
PRE-CONDITIONS / INPUTS
• EMR functionality has met the certification, business and technical requirements to leverage the Interprofessional Team Data Extract
POST-CONDITIONS / OUTPUTS
• NonPhysicianProvider documents visit electronically
MAIN SUCCESS SCENARIO (BASIC FLOW)

1. Non-Physician Provider documents visit with specifying the following visit details:
    • Physician Attended Visit
    • Visit Diagnosis
    • Visit Procedure
2. EMR saves visit details.

3.2 Generate Extract (UC-002)

This use case describes the process generate the extract.

PRIMARY ACTORS
• Clinic • EMR
TRIGGER(S)
• Clinic has a accesses the generate the extract functionality
PRE-CONDITIONS / INPUTS
• EMR functionality has met the certification, business and technical requirements to leverage the Interprofessional Team Data Extract
POST-CONDITIONS / OUTPUTS
• Extract is saved to an accessible location
MAIN SUCCESS SCENARIO (BASIC FLOW)
1. Clinic specifies extract details:

- Clinics or sites
- Non-physician providers
- Date range

2. EMR saves extract to an accessible location.

3.3 Transmit Extract (UC-003)

The Transmit Extract use case is outside the scope of the Interprofessional Team Data Extract Specification. As part of standard workflow, clinics will submit the generated extract through an agreed upon method with MHSAL.

4 Interprofessional Team Data Extract Requirements

This section includes mandatory requirements and guidelines for configuring an EMR to generate the Interprofessional Team Data Extract.

4.1 Requirement Column Definition

For ease of review and understanding, requirements are documented in a manner consistent with previous EMR Certification documentation. For each requirement, the following information is provided:
- **ID** – a unique identifier assigned to the requirement by Manitoba.
- **Requirement** – a concise statement describing the requirement.
- **Guidelines** – these additional instructions constitute part of the requirement and are relevant to implementation of the requirement in the EMR product. As such, these guidelines form part of the assessment criteria and are included in the planned product assessment.
- **Additional Notes** – relevant information or examples intended to give additional context to the requirement and to improve understanding.
- **Status** – each requirement is clearly identified as:
  - New (not included in previous specifications);
  - Updated (modification to intent of the requirement from a previous version); or
  - Previous (unchanged from last issuance of core requirements).
- **Assessment** – The method of assessment is stated in the "Assessment" column for each requirement. All requirements will be assessed using the following method:
  - Verification – leveraging the Certification Environment, Manitoba will verify the product's ability to meet requirements. Clinical and administrative resources may be involved in the verification process
  - Demonstration – Vendors will demonstrate key functions within their EMR product. Demonstrations may be conducted in person, by remote means (e.g. teleconference and Internet) or through recorded video.

4.2   General Requirements

Table 3: General Requirements

ID	REQUIREMENT	GUIDELINES	ADDITIONAL NOTES	STATUS	ASSESSMENT
ITD-001	Provides the ability to extract a data set relevant to non-physician encounters.	Must be able to generate on an ad-hoc basis. User must be able define the below extract filters: • clinics or sites • non-physician providers • date range of encounters Users generating the extract must only be able to select providers or clinics/sites for which they have appropriate permissions. Extract must include all encounters related to the specified filters.	Applies only to clinics or clinicians participating in ITDI.	Previous	Demonstration
ITD-002	Conforms to the Interprofessional Team Data Extract structure.	As defined in Section: 4.4 - Extract Structure Specification. All fields must be populated in the extract if the EMR has stored the corresponding visit information. A blank will be used to express that a specification field is not captured in the EMR. Extract must be in either a comma or tab delimited format.		Previous	Verification
ITD-003	Provides the ability to store extract results.	User must be able to save and store extract results.	e.g. to network, to CD, etc.	Previous	Demonstration

4.3 Data Capture Requirements

The following tables contain the Interprofessional Team Data elements required of the EMR to support the Interprofessional Team Data Extract.

Table 4: Data Capture Requirements

ID	DATA ELEMENT	DESCRIPTION	GUIDELINES	STATUS	ASSESSMENT
ITDDC-01	EMR Data Transport and Repository (EDTR) Clinic Identifier	Identifier assigned to clinic by MHSALfor use with data extract submissions.		Previous	Verification
ITDDC-02	Physician Attended Visit	Specifies, on a per encounter basis, if a physician attended during the non-physician provider encounter.	List of values must include: • Yes • No EMR must not force providers to complete this field if their scope of work enables them to work unsupervised.	Previous	Demonstration

4.4 Extract Structure Specification

The following tables contain the Interprofessional Team Data Extract specification.

Table 5: Extract Structure Specification

ID	ORDER IN EXTRACT	DATA ELEMENT	DESCRIPTION	TYPE AND FORMAT	STATUS	ASSESSMENT
ITDE-01	1	Clinic Identifier	An identifier assigned by Manitoba to identify the clinic. Value must be consistent with the EDTR Clinic Identifier. Used to identify the clinic or site submitting ITDI information.	Type: Character Format: ####	Previous	Demonstration

ITDE-02	2	Visit Date	Date on which the patient-provider encounter occurred. Supports analysis over time.	Type: Character Format:MMDD YYYY	Previous	Demonstration
ITDE-03	3	Provider Identifier	The identifier for the provider delivering primary care services during the patient-provider encounter. For physicians, this would be their billing ID but for other providers, this will be another identifier. Uniquely identifies the provider of health-care services for an encounter.	Type: Alphanumeric Format: dependent upon EMR values	Previous	Demonstration
ITDE-04	4	Provider Type	Represents the occupation of the provider. Identifies the occupation of the primary care providers associated with ITDI.	Type: Character	Previous	Demonstration
ITDE-05	5	Physician Attended Visit	Specifies, on a per encounter basis, if a physician attended during the non-physician provider encounter. Identifies if the service provider was supervised for an encounter.	Type: Character Format: 1 = Yes, 2 = No, Blank = not captured	Previous	Demonstration
ITDE-06	6	EMR Patient Identifier	The unique identifier assigned to the patient's record by the EMR. Used for traceability.	Type: Alphanumeric Format = dependent upon EMR values	Previous	Demonstration
ITDE-07	7	Patient Identifier Type	Represents the type of patient identifier.		Previous	Demonstration

ITDE-08	8	Patient Identifier	Represents the active health card number assigned to the patient. For the province of Manitoba, this is the Personal Health Identification Number or PHIN. Used to uniquely identify a patient within a jurisdiction.	Type: Character Format: Variable length string (Maximum 30 characters)	Previous	Demonstration
ITDE-09	9	Date of Birth	The patient's date of birth.	Type: Character Format: MMDDYYYY	Previous	Demonstration
ITDE-10	10	Administrative Sex	Represents the physical sex of the patient at a given time. Used for administrative purposes.	Type: Character Format: M, F or U	Previous	Demonstration
ITDE-11	11	Postal Code	The postal code of the patient's permanent residence.	Type: Character Format: A#A #A#	Previous	Demonstration
ITDE-12	12	Visit Diagnosis	The specific diagnosis related to this encounter. Multiple VisitDiagnosis codes may be represented by using a semi-colon as a separator (e.g. 5999;2810;25000) Used to understand the scope of services being delivered by the non-physician provider.	Type: Character Format: ICD-9 code	Previous	Demonstration
ITDE-13	13	Visit Procedure	The procedure performed during this encounter. Multiple VisitProcedure codes may be represented by using a semi-colon as a separator (e.g. 8529;8425;8422). Used to understand the scope of services being delivered by the non-physician provider.	Type: Character Format: Numeric tariff as per Manitoba Health	Previous	Demonstration

ITDE-14	14	Type of Appointment	The type of appointment as defined by the clinic or provider related to this encounter. Used to understand the scope of services being delivered by the non-physician provider.	Type: Character	Previous	Demonstration
ITDE-15	15	Reason for Visit	Represents the reason for the encounter as expressed by the patient. Used to understand the scope of services being delivered by the non-physician provider.	Type: Character	Previous	Demonstration
ITDE-16	16	Appointment Start Time	The scheduled start time for the appointment related to this encounter.	Type: Character Format: HHMM (24 hour clock)	Previous	Demonstration
ITDE-17	17	Appointment Duration	Length of the scheduled appointment related to this encounter. Must be captured in minutes.	Type: Character Format: ####	Previous	Demonstration

5   Appendix A: Use Case to Requirement Traceability

Table 6: Use Case to Requirement Traceability Matrix

Interprofessional Team Data Extract Specification - Requirements and Use Case Traceability

Rqmt ID	UC-001 Document Visit	UC-002 Generate Extract	Totals
ITD-001		X	1
ITD-002	X	X	2
ITD-003		X	1
ITDDC-01	X	X	2
ITDDC-02	X	X	2
Totals	**3**	**5**	**8**

6   Appendix B: Release Notes

Version 1.0 December 1, 2015

- Initial release

Version 1.1 March 31, 2020

- Updated document theme to new organizational visual identity
- Added Glossary
- Moved Introduction section to the new Business Objectives & Benefits Summary section
- Moved Scope to the new Interprofessional Team Data Extract Overview section
- Removed out-of-scope section and added a Transmit Extract Use Case which communicates it is out of scope
- Aligned Use Cases to the organization standard
- Updated all requirements with a status of previous
- Added table references to all tables
- Added Appendix A: Use Case to Requirement Traceability
- Added Appendix B: Release Notes