2024 Real World Test Plan

Tebra Technologies, Inc / Tebra (Kareo) EHR

Executive Summary

This is the real world test plan for CY 2024 for Tebra (Kareo) certified EHR solution. It provides the real world test measurements and metrics that meet the intent and objectives of ONC's Condition of Certification and Maintenance of Certification requirement for real world testing (§ 170.405 Real World Testing) to evaluate compliance with the certification criteria and interoperability of exchanging electronic health information (EHI) within the care and practice setting which it is targeted for use.

As ONC has stated in its rule, "The objective of real world testing is to verify the extent to which certified health IT deployed in operational production settings is demonstrating continued compliance to certification criteria and functioning with the intended use cases as part of the overall maintenance of a health IT's certification." We have worked toward this objective in designing our test plan and its subsequent real world testing measurements and metrics.

This document builds toward the final testing measurements and metrics we will use to evaluate our product interoperability within production settings. Within each measure, we document planned testing methodology, associated ONC criteria, justification for measurement, expected outcomes from the testing, care settings applied for this measure, including how our test cases were created, our selected methodology, and our general approach and justification for decisions.

We have included our timeline and milestones for completing the real world testing in CY 2024, and information about compliance with the Standards Version Advancement Process updates.

A table of contents with hyperlinks is provided later in the plan for quick access to any document section, including the testing measurements and metrics found at the end of this document. Our signed attestation of compliance with the real world testing requirements if on the following page.

Developer 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.

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General Information

Plan Report ID Number: Tebra-RWT-2024

Developer Name: Tebra Technologies, Inc.

Product Name(s): Tebra (Kareo) EHR

Version Number(s): 5.0

Certified Health IT Criteria: 315(b)(1)-(3), (b)(6), (e)(1), (g)(7),(g)(9)-(10)

Product List (CHPL) ID(s) and Link(s):

- 15.04.04.2777.Kare.05.02.1.221219
- https://chpl.healthit.gov/#/listing/11090

Developer Real World Testing Page URL: http://www.tebra.com/macra

Timeline and Milestones for CY 2024

- 1Q-2024: Health IT system is fully enabled for use in real world testing.

- 3Q-2024: Begin making plans to collect data for RWT measures. If necessary, engage clients to ask for their support and participation in real world testing.

- 4Q-2024: During the last quarter of the year, the CY 2024 Real World Test plan will be completed according to ONC and ONC-ACB requirements and expectations. Test Plan will be prepared for submission.

Standards Version Advancement Process (SVAP) Updates

Currently, we are using all required 2015 Edition Cures Update standards. The RWT measures listed in this plan are based on these standards, and any SVAP updates are explicitly noted below. We are awaiting the updated requirements in the HTI-1 rule which has not yet been released. Based on the standards stipulated by this future ruling, we will update our standards and implementation guide as needed, and these changes may be captured in our CY 2024 RWT test results.

No SVAP update planned at this time.

Standard (and version)	N/A
Updated certification criteria and associated product	N/A
Health IT Module CHPL ID	N/A
Method used for standard update	N/A
Date of ONC-ACB notification	N/A
Date of customer notification (SVAP only)	N/A
Conformance Measure	N/A
USCDI-updated Certification criteria (and USCDI version)	N/A

Real World Test Measurements

The measurements for our Real World Test plan are described below. Each measurement contains:

- Associated ONC criteria
- Testing methodology used
- Description of the measurement/metric
- Justification for the measurement/metric
- Expected outcomes in testing for the measurement/metric
- Number of client sites to use in testing (if applicable)
- Care settings which are targeted with the measurement/metric

In each measurement, we elaborate specifically on our justification for choosing this measure and the expected outcomes. All measurements were chosen to best evaluate compliance with the certification criteria and interoperability of exchanging electronic health information (EHI) within the certified EHR.

Testing Measurements

For each measurement, a testing methodology is used. For our test plan, we use the following methodology.

Reporting/Logging: This methodology uses the logging or reporting capabilities of the EHR to examine functionality performed in the system. A typical example of this is the measure reporting done for the automated measure calculations required in §170.315(g)(2), but it can also be aspects of the audit log or customized reports from the EHR. This methodology often provides historical measurement reports which can be accessed at different times of the year and evaluate interoperability of EHR functionality, and it can serve as a benchmark for evaluating real world testing over multiple time intervals.

Care and Practice Settings Targeted

Tebra (Kareo) EHR is primarily targeted to small practices, general ambulatory practices, and our measures were designed for this setting. In each measure, we do also address the care settings targeted and note any necessary adjustment or specific factor to consider with the specific measure.

RWT Measure #1: Number of Transition of Care C-CDAs Successfully Sent

Associated Criteria 315(b)(1)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many C-CDAs are created and successfully sent from the EHR Module to a 3rd party via direct messaging during a transition of care event over the course of a given interval.

Measurement Justification
Interoperability of C-CDA exchange is a critical need for the small practice sites we support with our EHR. They use this capability to share data with local hospitals as well as make referrals out to specialists. Because of this use case, we will create a RWT measure capturing the number of C-CDAs sent from the EHR to other providers.

This measure will provide a numeric value to indicate both how often this interoperability feature is being used as well as its compliance to the requirement. An increment to this measure indicates that the EHR can create a C-CDA patient summary record, including ability to record all clinical data elements, and by sending the C-CDA patient summary record, the EHR demonstrated successful interoperability of an exchanged patient record with a 3rd party. This measurement shows support for Direct Edge protocol in connecting to our relied upon software HISP Updox (Version 2016.1) for successful transmission.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize various reports and audit logs, including Automated Measure (315(g)(2)) reports, to determine our measure count.

A successful measure increment indicates compliance to the underlying ONC criteria. It will show that the EHR can create the C-CDA patient summary record, including record required clinical data elements. In sending the C-CDA patient summary record, the EHR will demonstrate ability to confirm successful interoperability of an exchanged patient record with a 3rd party, including support for direct edge protocol in connecting to a HISP. Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings

We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #2: Number of C-CDAs Received and/or Incorporated

Associated Criteria 315(b)(2)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many C-CDAs are successfully received and/or incorporated upon receipt from a 3rd party via direct messaging during a transition of care event.

Measurement Justification
Because our user community receives many inbound C-CDA patient records, they need the EHR to support them in the receipt as well as the incorporation of problems, medications, and medication allergies into the patient record. This measure provides real world interoperability insight into its use.

This measure will provide a numeric value to indicate both how often this interoperability feature is being used as well as its compliance to the requirement. An increment to this measure indicates that the EHR can receive a C-CDA patient summary record, and by incorporating the C-CDA patient summary record, the EHR demonstrates successful interoperability of problems, medications and medication allergies of patients treated by a 3rd party. This measurement shows support for Direct Edge protocol in connecting to our relied upon software HISP Updox (Version 2016.1) for successful transmission.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize various reports and audit logs, including Automated Measure (315(g)(2)) reports, to determine our measure count.

A successful measure increment indicates the EHR can receive a C-CDA patient summary record and then incorporate the problems, medications, and medications allergies into the patient record. This will also demonstrate ability to exchange data by using the Direct Edge protocol via our HISP, Updox.

Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings

We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #3: Number of NewRx Prescription Messages Successfully Sent

Associated Criteria 315(b)(3)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many NewRx electronic prescriptions were created and successfully sent from the EHR Module to a pharmacy destination over the course of a given interval.

Measurement Justification
The Rcopia DrFirst e-Prescribing solution is integrated into our EHR workflow, and our providers use this regularly for their prescribing needs. This measure will provide a numeric value to indicate both how often this interoperability feature is being used as well as its compliance to the requirement. An increment to this measure indicates that the EHR can create a NewRx SCRIPT electronic prescription message and transmit it to a pharmacy, typically via the Surescripts Network. This will also show that our integration with DrFirst is working in production just as we demonstrated in our certification.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize various reports and audit logs, including Automated Measure (315(g)(2)) reports, to determine our measure count.

A successful measure increment indicates compliance to the underlying ONC criteria. It will show that the EHR can create the NewRx message and send over a production network, like the Surescripts Network, to a pharmacy.

Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings
We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #4: Number of Patient Batch Exports Run

Associated Criteria 315(b)(6)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many batch exports of C-CDAs were successfully performed by the EHR over the course of a given interval.

Measurement Justification
Batch exporting can be a useful function for interoperability to allow providers to share large volumes of patient data. However, we are not sure how often this functionality is being used in production. We will capture its execution to document its interoperability performance.

This measure will provide a numeric value to indicate both how often this interoperability feature is being used as well as its compliance to the requirement. An increment to this measure indicates that the EHR can create a batch export of multiple C-CDA patient summary records.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize a database report to determine our measure count.

A successful measure increment indicates compliance to the underlying ONC criteria. It will show that the EHR can create a batch export of multiple C-CDA patient summary records, which can be used in means of health IT interoperability.

Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings
We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #5: Number Patients Given Access to Portal

Associated Criteria 315(e)(1)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many patients are given login access to their patient portal account over the courses of a given interval.

Measurement Justification
Access to patient portal is a necessary feature of patient engagement with their healthcare, and this measure will provide a numeric value to indicate how often this interoperability feature is being used. An increment to this measure indicates that the EHR can supply patient health data to the patient portal and provide an account for the patient to use in accessing this data.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize various reports and audit logs, including Automated Measure (315(g)(2)) reports, to determine our measure count.

A successful measure increment indicates compliance to the underlying ONC criteria. It will show that the EHR can submit patient health data to the patient portal on a regular and consistent basis as well as provide an account for the patient to use in accessing this data.

Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings
We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #6: Number of Patients Who Accessed/Logged into Portal

Associated Criteria 315(e)(1)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many patients have successfully logged into and accessed their patient portal account over the course of a given interval.

Measurement Justification
The measure will provide a numeric value to indicate how often patients are logging into their portal account to view their record. An increment to this measure indicates that patients can log into their patient portal to view, download, or transmit their health data as well as its compliance to the requirement.

Measurement Expected Outcome
The measurement will produce numeric results over a given interval. We will utilize various reports and audit logs, including Automated Measure (315(g)(2)) reports, to determine our measure count.

A successful measure increment indicates compliance to the underlying ONC criteria. It will show that patients can log into their patient portal to view, download, or transmit their health data.

Successfully completing this measure also implies users have a general understanding of the EHR functional operations for this EHR module and an overall support for the user experience while not completing this measure may indicate lack of understanding or possibly lack of use or need for this functionality.

Care Settings
We designed this measure to test small practice, general ambulatory sites that we support and target.

RWT Measure #7: Number of API Applications Registered

Associated Criteria 315(g)(7), (g)(9)-(g)(10)

Testing Methodology Reporting/Logging

Measurement Description
This measure is tracking and counting how many different systems or applications are connecting to our EHR via the FHIR API.

Measurement Justification
This measure will determine how many 3rd party systems or applications are integrated and using our EHR's FHIR API interface and our FHIR server, supported by SmileCDR relied upon software. This measure will allow us to verify our certified API is working with 3rd party applications to access USCDI patient data.

Measurement Expected Outcome
This measure will provide a count of FHIR applications which have registered with our server for patient access as well as applications actively connecting to our FHIR server.

We will utilize our FHIR API form which developers use to request API access as well as additional reports and audit logs to determine the number of API applications enabled for our system.

Care Settings
We designed this measure to test small practice, general ambulatory sites that we support and target.