

Request Documents for a Patient Through Carequality

Last Modified on 09/07/2023 9:16 am EDT

 This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

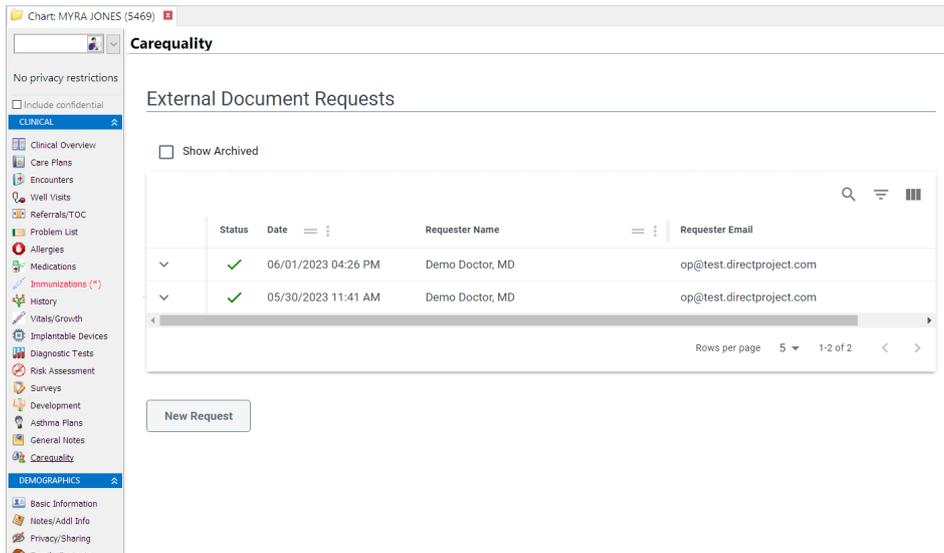
About

Carequality allows you to request documents related to a patient that exist outside your practice, and add them to that patient's chart.

Navigate to Carequality through a Patient's Chart

The Carequality window to request documents can be found through the patient's chart:

1. Open the **Patient Chart**, and search for and select the patient if not already selected.
2. Click the **Clinical** tab.
3. Click **Carequality**  on the left side of the Patient Chart.
4. The **External Document Requests** screen opens. Initially, this screen will be empty for all patients, since you haven't requested any documents yet. All requests for the patient will appear here once they have been made.



The screenshot shows the 'Carequality' window within a patient chart for 'MYRA JONES (5469)'. The window title is 'Carequality' and the main heading is 'External Document Requests'. There is a 'Show Archived' checkbox. Below this is a table with columns for Status, Date, Requester Name, and Requester Email. Two rows are visible, both with a green checkmark status. A 'New Request' button is located at the bottom left of the table area.

Status	Date	Requester Name	Requester Email
✓	06/01/2023 04:26 PM	Demo Doctor, MD	op@test.directproject.com
✓	05/30/2023 11:41 AM	Demo Doctor, MD	op@test.directproject.com

Request Documents for a Patient

Carequality improves data exchange by putting all the information created by a health care provider into an online pool. You can search the entire pool with Carequality and download data on your patients to your OP.

To request documents for a Patient:

1. Navigate to **Carequality** using the path above.
2. On the **External Document Requests** screen, click the **New Request** button.
3. The **Search Organizations** screen opens. There are three tabs, allowing you to search by:
 - **Zip Code:** Type in the Zip Code to search for Organizations by zip code.
 - **Name:** This tab gives you options to search by Organization Name, Address, City, State, and Zip Code. To prevent

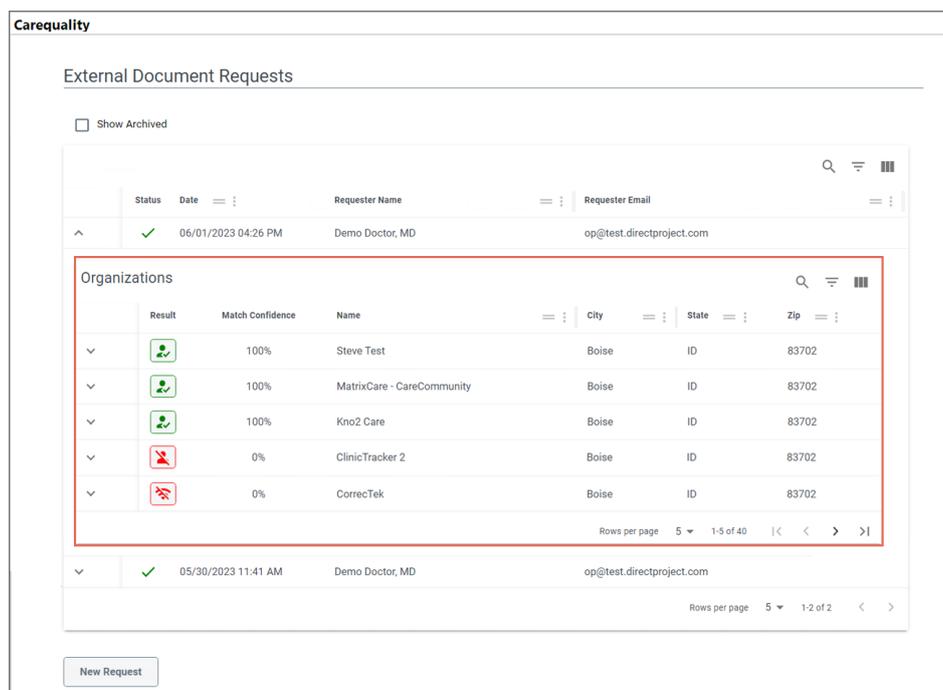
the searches from taking too long, you are required to fill out a minimum combination of search criteria here. Below is a list of the search fields with the minimum other search fields that are required to be filled out:

- **Organization Name:** Must also include at least the State.
 - **Address:** Must also include at least the City and State.
 - **City:** Must also include at least the State.
 - **State:** Must also include at least the City or the Organization Name.
 - **Zip Code:** Must also include the Address, City and State.
- **ID Number:** Search by the Organization ID Number in this tab if you know it.
4. Click the **Search** button.
 5. A listing of all Carequality-enabled Practices, Hospitals, and Organizations that match the search terms appear. Choose which organization(s) you want to search for the patient by selecting the **check box** next to the organization(s) to which you want to submit your search request.
 - You can choose All locations listed by clicking the **check box** at the top of the column.
 - Alternatively, you might choose to limit your search to the most likely candidates. For example, your local adult GI specialist and Veterans Administration hospitals are very unlikely to have any records for a pediatric patient.



Note: An organization being listed in this step does not necessarily mean that this patient has records there.

6. Once you have selected all the organization(s) you want to search, click the **Submit** button. Depending on how many organizations you are searching, this step may take a few seconds to a minute to complete.
7. After clicking Submit, you will return to the External Document Request screen. Here, you'll see a list of organizations that you've searched, along with any potential matches for your patient. Each row is an organization (name, city, and state), along with whether documents were found for that patient, and a match confidence score.
 - The red and green colored **icons** represent:
 -  : Patient is matched on.
 -  : Could not connect to that organization. To retry the request for that document, click the button.
 -  : No results found for this patient.
 - The **match confidence** score is how likely we think the records belong to the patient you're looking for. This is computed based on how well demographic data in OP matches the demographic data in the organization's record. This includes comparison of first and last name, gender, DOB, Social Security Number, address, and phone number.



Carequality

External Document Requests

Show Archived

Status	Date	Requester Name	Requester Email																																				
✓	06/01/2023 04:26 PM	Demo Doctor, MD	op@test.directproject.com																																				
<p>Organizations</p> <table border="1"> <thead> <tr> <th>Result</th> <th>Match Confidence</th> <th>Name</th> <th>City</th> <th>State</th> <th>Zip</th> </tr> </thead> <tbody> <tr> <td></td> <td>100%</td> <td>Steve Test</td> <td>Boise</td> <td>ID</td> <td>83702</td> </tr> <tr> <td></td> <td>100%</td> <td>MatrixCare - CareCommunity</td> <td>Boise</td> <td>ID</td> <td>83702</td> </tr> <tr> <td></td> <td>100%</td> <td>Kno2 Care</td> <td>Boise</td> <td>ID</td> <td>83702</td> </tr> <tr> <td></td> <td>0%</td> <td>ClinicTracker 2</td> <td>Boise</td> <td>ID</td> <td>83702</td> </tr> <tr> <td></td> <td>0%</td> <td>CorrecTek</td> <td>Boise</td> <td>ID</td> <td>83702</td> </tr> </tbody> </table>				Result	Match Confidence	Name	City	State	Zip		100%	Steve Test	Boise	ID	83702		100%	MatrixCare - CareCommunity	Boise	ID	83702		100%	Kno2 Care	Boise	ID	83702		0%	ClinicTracker 2	Boise	ID	83702		0%	CorrecTek	Boise	ID	83702
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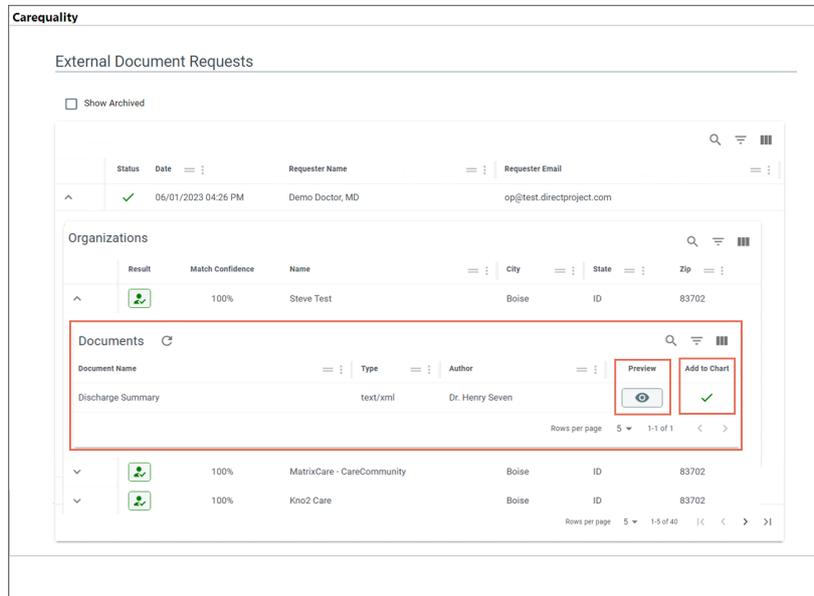
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[New Request](#)

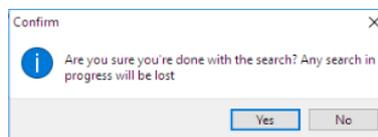
8. To view the documents that were found in a particular organization's repository, click the **down arrow** to the left of the

green **Match** icon  for the organization.

9. The **Document Name**, **Type**, and the **Author** of the document will be listed.
 - Click the **Preview** button to see what's in a document before committing to add it to your OP.
 - Click **Add to Chart** (plus) button once you've previewed a document to add it to the patient's chart.
 - If you don't want to add that document to your OP, click the **up arrow** to the left of the document you are viewing to close it, then repeat steps 8 and 9 for other organizations.



10. Once you've clicked Add to Chart, that button changes to **Processing**. You can leave this window and work in other areas of OP while it is processing, and the document will be added in the background.
11. When you want to leave this window, you'll be prompted with a popup. Click **Yes** to continue.



Note: When you leave the Carequality tab, any pending searches in progress will be stopped. However, any potential document matches already present for Preview and potentially adding to the chart will remain, even if you close this window.

View the Documents That Have Been Added Through Carequality

Once you have imported items through Carequality, they will appear in **Document Management** with the Category **Carequality**.

- To view all of the imported Carequality documents, [navigate to Document Management and search by Category](#)
- To set the **Privacy Level** of Carequality documents added to your OP, follow the normal steps to [edit a document's Privacy Level](#) (step 5 in the **Label the Document** section of this article).

Chart: MYRA JONES (5469)

Print | Export

No privacy restrictions

Include confidential

Basic Information
Notes/Add'l Info
Privacy/Sharing
Family Contacts
Clinical Contacts
Consent Forms

ACCOUNT

Summary
Insurance
Claims
Charges
Payments
Credits
Statements
Disclosures

COMMUNICATION

Messages
Tasks
General Letters

REPORTS

Documents (11)
Medical Records
School/Camp

Dates: 1 mo | 1 yr | All | EFR
expand grid | Refresh

Shared To Portal | Item Type

Category | Date

Shared To Portal: False

Item Type: CAREQUALITY

Carequality	05/30/2023
Carequality	04/28/2023
Carequality	04/07/2023
Carequality	03/30/2023
Carequality	03/21/2023
Carequality	03/17/2023
Carequality	03/15/2023
Carequality	02/28/2023
Carequality	02/28/2023

Community Health and Hospitals: Health Summary

Patient	Myra Jones		
Date of birth	May 1, 1947	Sex	Female
Race	White	Ethnicity	Not Hispanic or Latino
Contact info	Primary Home: 1357 Amber Drive Beaverton, OR 97006, US Tel: (816)276-6909	Patient IDs	1 2.16.840.1.113883.4.6 000-10-5230 2.16.840.1.113883.4.1
Document Id	05397a63-f4f8-42b2-8e10-04476978d35e 2.16.840.1.113883.3.72		
Document Created:	September 12, 2012, 00:00:00 -0000		
Care provision	Pneumonia from August 6, 2012 to August 13, 2012		
Performer (primary care provider)	Dr. Henry Seven of Community Health and Hospitals		
Author	Dr Henry Seven		
Contact info	1002 Healthcare Drive Portland, OR 97266, US Tel: 555-555-1002		
Encounter Id	1 2.16.840.1.113883.4.6	Encounter Type	Pneumonia
Encounter Date	From August 6, 2012 to August 13, 2012		
Encounter Location	id: 2.16.840.1.113883.4.6		
Responsible party	Dr Bob Administrator		
Personal	Mr Dalish Jones		

Patient Information

Patient ID 5469
Patient name MYRA JONES

Review Details

Item type CAREQUALITY
Item category Carequality
Reviewed?
Reviewed by
Review date
Privacy level Any staff member
Discharge Summary Author: Dr. Henry Seven, Community Health and Hospitals

Administrative Details

Creation date 05/30/2023
Created by Web Portal User
Created location
Correspondent
Addressed to
Status of original
Last updated

Technical Details

Document ID 12951
Page count
Tech info Discharge Summary
docximages/5469-CAREQUALITY-1e6fc808-5335-4f69-9988-7c888284c9c6.xml
URL
File extension xml
File type CDA
Storage type Cloud



Quick Tip Videos: Don't have much time to spare? Want a quick review of the content in this article? Watch our Quick Tip videos related to [Privacy](#) for on-the-job help or a refresher of what this article goes over.



Note: The date listed in the OP index is the date that you added it to your OP. This is not the same as the date that the outside organization created the document, which is also not necessarily not the same as the date of service.

Example: A patient may have had an appendectomy on May 1. The surgeon did not prepare the discharge summary until May 5, and you did not download and import the discharge summary until May 10. The date listed in the OP index for this document would be May 10.