Getting Started with Carequality (Implementation and Setup)

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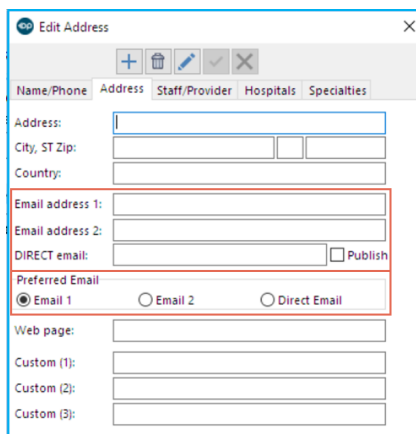
About

Sharing patient data into a national pool, even a secure one, should be a decision that each practice undertakes thoughtfully. As such, joining Carequality is not automatic. There are multiple steps you need to take:

- You must sign a contract with OP and Carequality which covers the operating agreement. Please reach out to your Account Manager or email the Account Management team at solutions@officepracticum.com
- OP implementation must add a Correspondent record to your OP. This will take place automatically after you return your signed Carequality contract to your Account Manager.
- All patients in your OP (both currently active and prior patients) will automatically be added to the Carequality network. To opt out patients, you must mark them accordingly in OP before you turn on Carequality. See the section below on **How To Opt-Out a Particular Patient** for more information.
- To use CareQuality, users must have the appropriate permissions and email addresses associated with them. See the section below on **User Requirements and Permissions** for more information.
- Finally, you must activate Carequality. As soon as you activate it, sharing will begin.

User Requirements and Permissions

To use CareQuality, users must have the following fields and permissions:

1. Assign the following permissions to the **Users** or **Groups**:
   - **Chart View/Open**: Most clinical users will have this already.
   - **Carequality**: This gives read/write permission to search and to import things into the chart.
2. Add an **email address** associated with the users in the **OP Address book** on the **Address** tab.

   a. To see what email address is associated with a user, open the **Address Book** (**F4**), then **search** for that person.
   b. Once you have located that individual, double click to open their **Address Book record**, then click the **Address** tab.
   c. An email address in **Email address 1**, *OR* **Email address 2**, *OR* a DIRECT address in **DIRECT email** is sufficient for this purpose.
   d. Select the radio button in the **Preferred Email** section that matches the email type you entered in Step C.
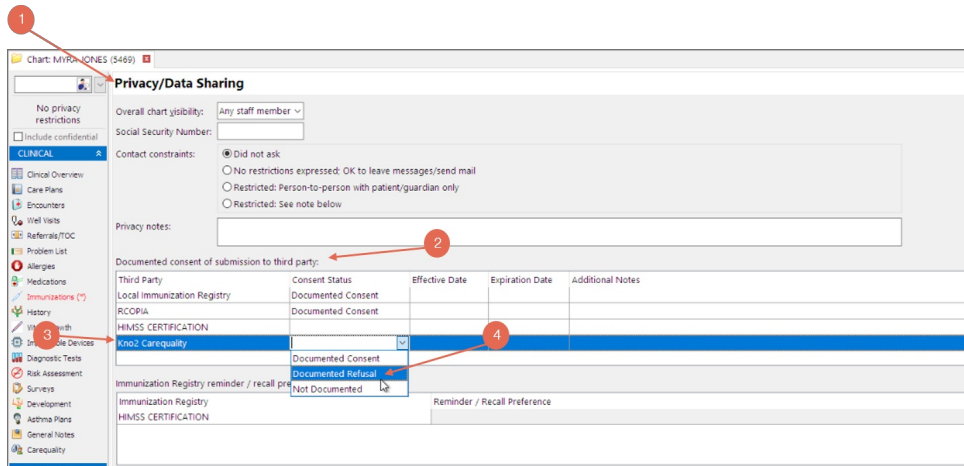
How to Opt-Out a Particular Patient

In the Carequality contract, you agree to send patient data on ALL patients UNLESS they have a documented opt-out.

To opt-out a patient:

1. Navigate to **Patient Chart** > **Privacy/Data Sharing**.
2. In the **Document consent of submission to third party** section, locate the row for **Kno2 Carequality**.
3. Click in the **Consent Status** column for Kno2 Carequality.
4. Select **Documented Refusal** from the drop-down.