

Subcommittee: HIE Operations, Compliance, and Efficiency

Co-chairs: Dr. Yavar Moghimi and Dr. Mary Awuonda

Date: January 19, 2023

Status: Draft



District of Columbia Health Information Exchange Policy Board

Recommendation to Approve the Use of Educational Materials Regarding DC HIE Tools for Health-Related Social Needs Screening and Referral

I. SUMMARY

The HIE Policy Board Stakeholder Engagement subcommittee proposes the approval of an educational workflow. This workflow is intended to illustrate how providers in different care settings can use CRISP DC tools to capture, view, and track social needs screening and referral data. The workflow aims to further the use of HIE tools to screening and document social needs, search for community-based organizations (CBOs), and send e-Referrals, all within the CRISP environment. The workflow also includes an example step-by-step breakdown of how users can incorporate the use of these tools within their workflow and offers additional reference materials. The workflow handout was developed in conjunction with feedback from the HIE Community Resource Inventory (CRI) subcommittee.

II. PROBLEM STATEMENT

As outlined in the 2022 State Medicaid Health IT Plan (SMHP) update, Recommendation #6 outlines the need to improve education and communication efforts in order to increase awareness and use of the DC HIE and its tools. In response, the Stakeholder Engagement subcommittee reviewed the DC Community Resource Information (CoRIE) Initiative – an interoperable system within the DC HIE that allows for social needs data sharing between different stakeholders across the health care continuum. This includes three major functions – (1) Sharing of Health-Related Social Needs (HRSN) screening data; (2) Resource lookups through a centralized directory within the HIE; and (3) Electronic referrals to CBOs and other support services. As such, these tools enable a user to view social needs screening and assessment information in the HIE, derived from multiple sources including electronic health records (EHRs). The referral tool also facilitates digital connections with CBOs and other support service providers to address unmet social need, while also allowing users to review referral status and referral history. Various subcommittee members also underscored that the use of CRISP tools is a new addition to existing workflows at health care facilities. To address this, the Stakeholder Engagement subcommittee developed a workflow that outlines screening to referral pathways that are supported by these tools and promotes the value of utilizing DC HIE tools.

III. SUBCOMMITTEE GOAL AND ACTIVITY

This activity can be added under Goal #1 under the subcommittee’s workplan – *Identify and inform ways to improve stakeholder engagement in the District’s HIE initiatives and to promote the value of health information exchange and of advancing along the SMHP HIT Framework to District stakeholders.*

Subcommittee: HIE Operations, Compliance, and Efficiency

Co-chairs: Dr. Yavar Moghimi and Dr. Mary Awuonda

Date: January 19, 2023

Status: Draft

IV. DISCUSSION

The Stakeholder Engagement subcommittee proposes an educational handout for providers that highlights the various HRSN tools within the CRISP environment. This handout is located in **Appendix 1** of this document. To inform the development of materials, the subcommittee hosted various representatives from the Designated HIE entity, CRISP DC, and reviewed all three functions and tools available within the CRISP environment. In addition, the subcommittee held robust discussions on the utilizing and notating Z-codes within EHRs. The subcommittee considered perspectives from the DC Primary Care Association (DCPCA) and the DC Hospital Association (DCHA) and their respective pilot initiatives to increase social needs screenings and documentation of Z-codes for identified social needs. The subcommittee also worked with representatives from the HIE CRI subcommittee for additional feedback on the resources available in the DC CRI and assisted CRISP DC partners in the development of a priority list of CBOs for outreach and onboarding to the HIE. To ensure that this handout remains updated, the subcommittee will periodically review and update the workflow as necessary. This review will include any updates to existing HIE tools, inclusion of any new HIE tools, and additional reference materials (if appropriate).

V. RECOMMENDATION(S) FOR BOARD ACTION:

The Stakeholder Engagement subcommittee proposes that the DC HIE Policy Board approve the use of this handout to educate providers on using social needs tools on the DC HIE.

Committee Members: Dr. Yavar Moghimi; Dr. Mary Awuonda; Dr. Eric Marshall; Mr. Mark LeVota; Mr. Ronald Emeni; Mr. Andrew Malcolm; Mr. Luigi Leblanc; Ms. Stephanie Brown; Ms. Linda Nguyen; Ms. Eden Cunningham; Ms. Donna Ramos-Johnson; Ms. Corrine Jimenez; Ms. Nancy Ware; Mr. David Poms; Ms. Luizilda de Oliveira; Ms. Adaobi Anyiwo; Ms. Alexandra Gagno; Ms. Rayna Smith; Dr. Neal Sikka; Mr. Nathaniel Curry; Ms. Eduarda Koch; Ms. Maava Khan; Mx. Deniz Soyer.

Subcommittee: HIE Operations, Compliance, and Efficiency

Co-chairs: Dr. Yavar Moghimi and Dr. Mary Awuonda

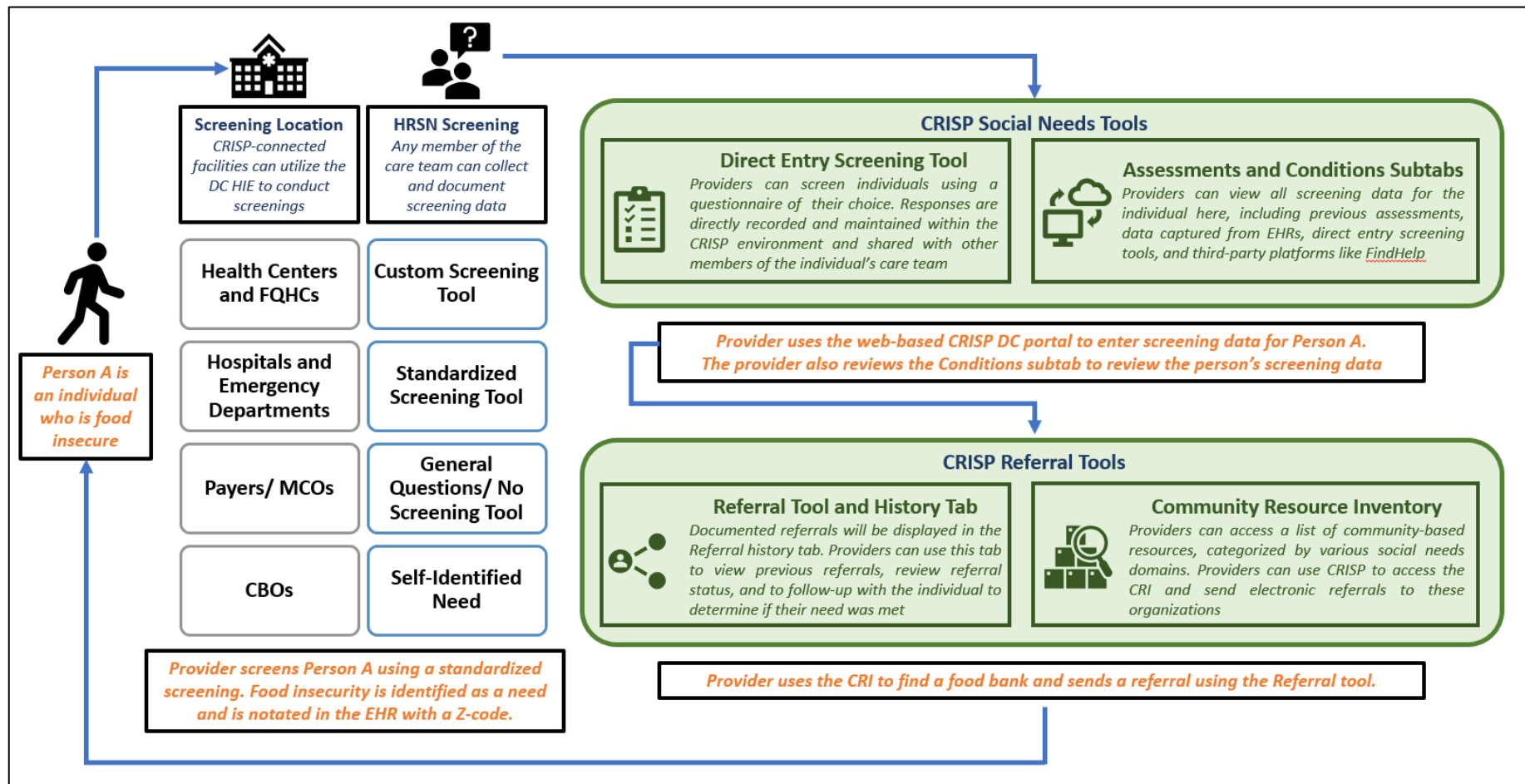
Date: January 19, 2023

Status: Draft

Appendix 1: Educational Materials for HRSN Tools on the DC HIE

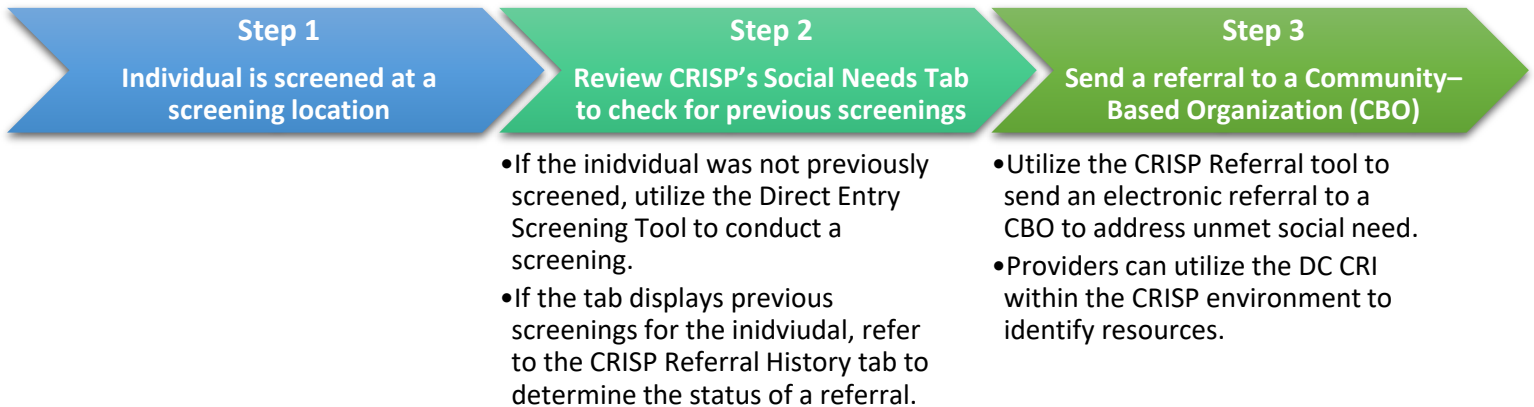


DC HIE HRSN SCREENING TO REFERRAL WORKFLOW



CRISP DC and DHCF have partnered with District stakeholders to offer a cohesive solution to conduct screenings, capture data on social needs, and enhance closed-loop electronic referrals. This workflow is intended to illustrate how providers in different care settings can use CRISP DC tools to capture, view, and track social needs screening and referral data.

Below are the general steps that providers can take to use CRISP tools:



Description of DC HIE Social Needs Tools

- **Screening:** The DC HIE enhances existing social needs screening workflows by consolidating screening data from current and previous patient encounters.
 - Assessments and Conditions Subtab: Updated real time, this tab pulls information from EHRs, ADTs, and from screening results submitted from other entities such as MCOs. Together, the subtabs offer a comprehensive view of the patient's screening history. This tab also displays screening data from third-party referral platforms (e.g., FindHelp, Mahmee).
 - Direct Entry Screening tool: This tool allows for providers or organizations to choose from a variety of pre-populated evidence-based standardized screening tools (e.g., PRAPARE, AHC), allowing credentialed users to directly input social needs data into CRISP. Health care settings that do not currently have a mechanism for screening and assessment can document and track the social needs of their patients.
- **Community Resource Inventory (CRI):** The DC CRI is a publicly available directory of community-based organizations that offer various services to address unmet social need. Providers can utilize the CRI to access this directory directly within the CRISP environment.
- **Referrals:** The DC HIE augments referrals pathways by allowing providers to both conduct and track referrals to various organizations, while also consolidating referral history for a patient. The CRISP Referral Tool allows for closed-loop electronic referrals such that providers can send and track a referral to a community-based organization (CBO) all within the CRISP environment. CRISP-connected CBOs can receive these referrals and close the loop, and can send referrals to other CBOs to address any additional needs.

You can review more information on the CRISP Social Needs tools on the CRISP DC website at crispdc.org.

Additional Resources and Reference Materials

- CRISP DC Webpages: [Screening](#), [Referral](#), [DC CRI](#)
- CMS; [Infographic on Using Z-codes](#)
- CMS, August 2022; [A Guide to Using the Accountable Health Communities Health-Related Social Needs Screening Tool](#)
- HIMSS SDOH Guide: [Workflow Considerations](#)
- Health Leads; [Social Health Data Toolkit](#)
- NACHC; [PRAPARE Implementation Toolkit](#)