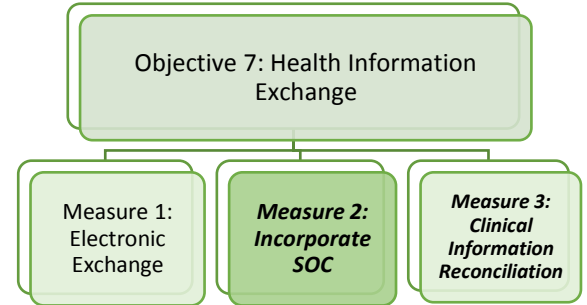


# Staged for Success: Stage 3

## Health Information Exchange:

### Incorporate the Summary of Care



### What is Health Information Exchange?

Health Information Exchange (HIE) refers to the electronic exchange of a summary of care (SOC) when an Eligible Professional (EP) transitions or refers a patient to another setting of care or provider of care using certified EHR technology (CEHRT). In addition to all transitions of care and referrals, Measure 2 of the HIE objective also includes patient encounters in which the EP has never previously provided care to the patient. For Stage 3 of the Medicaid Promoting Interoperability Program, the EP is required to incorporate an electronic SOC document into their EHR for more than 40% of these patients during the EHR reporting period.

### Important Points to Consider

- The EP must attest to all three measures under the HIE Objective but must only meet the thresholds for two of the three measures to meet overall objective requirements.
- The EP can exclude from the denominator those patients whose SOC documents are considered “unavailable” to the EP.
  - A SOC is “unavailable” when the EP requested a SOC from the referring provider and did not receive one, **and** the EP either queried at least one external source using HIE technology and did not locate a SOC, **or** the EP confirmed that HIE functionality to query an SOC was not operational in the EP’s geographic region nor available within the EP’s EHR network.
- CMS does not strictly define “incorporate,” leaving it up to the EP to do so in the way deemed most appropriate and allowed with their CEHRT, as long as the SOC received remains accessible to the EP in the patient record.
- The EP can claim an exclusion for Measure 2 if the total transitions or referrals received and patient encounters in which the EP has never before provided care to a patient is fewer than 100 during the EHR reporting period.