

## SMA EMR Program Orientation

Are you adopting an EMR for the first time, or relocating clinics? Would you like to optimize the way in which you use your EMR and streamline workflows? Are you interested in exploring digital health tools available for integration in your EMR?

Your EMR Program Practice Advisor can support you with these, and more!

### **The EMR Program offers:**

- Assistance with EMR Adoption and relocating to a different clinic including:
  - Providing information for your vendor selection
  - Supporting you at the vendor initiated meeting
  - Coordinating your integrated services with eHealth
  - Support through EMR training and Go Live process
  - Applying for EMR Program Funding
- Provision of privacy policy and procedures templates
- EMR workflow analysis and support with EMR use optimization
- Integrated services training
- Coordination of peer services
- Support in identifying and adopting additional digital health tools

The EMR Program is available to support your EMR decisions from the point of consideration to implementation and optimization. For more information about the SMA EMR Program and our services please call 306.244.2196 or email [emr@sma.sk.ca](mailto:emr@sma.sk.ca).

To assist physicians with the cost of implementing and maintaining an EMR, funding is available to qualified physicians using an approved EMR solution. The cost of this program is funded by the Saskatchewan Medical Association (30%) and the Saskatchewan Ministry of Health (70%).

To apply for funding, your clinic must implement an approved EMR and utilize it as per the guidelines below. The SMA EMR Program *Application for Funding* is available on the MySMA member portal ([click here](#)). The funding application is to be completed once your new clinic has gone live, or you have started at your new clinic.

### **EMR Program Funding Guidelines**

To qualify for funding, physicians must maintain an approved EMR system and utilize it appropriately so that it can integrate with the province's electronic health record (eHR) through standard interfaces as they become available.

The funding consists of two parts:

1. \$1.00 per patient encounter

- Physicians are paid \$1 every time an approved eligible fee code is submitted for billing through their EMR. There must be documentation in the EMR to support this fee code and it must contain sufficient information to meet the profession's generally accepted standard for medical records.
- This funding is paid by Medical Services Branch (MSB) with your regular pay.

2. \$300 per month

- To qualify for this payment in the first year, 50% of submitted fee codes (from the approved list) must have the visit encounter captured in the EMR.
- After one year, 95% of submitted fee codes (from the approved list) must have the visit encounter captured in the EMR.
- This funding is paid quarterly by MSB.

Proper utilization of the EMR is encouraged to prepare for eHR integration, to meet best practices and to help physicians realize the full benefits of their EMR.

The following list is a summary of the funding conditions:

- Use the EMR for billing submissions to MSB
- Follow the MSB cut-off and payment schedule
- Ensure that the EMR fee code box is checked on the claims details page
- Bill the eligible approved fee codes (A List of EMR Eligible Fee Codes can be found [here](#)).

The following is a list of best practices for EMR utilization:

- Record patient demographics and appointments in the appropriate fields
- Maintain patient encounter notes
- Generate lab and diagnostic imaging requisitions, and prescriptions through the EMR
- Generate electronic referral/consultation letters that utilize the patient's medical information captured within the EMR

Please contact your Practice Advisor for more information on any of the above.

### EMR Funding Calculations

Funding payments are based on the fee codes submitted to MSB through your EMR's billing system.

The amount of funding you will receive is based on the list of approved fee codes (please see page 5 for the detailed list).

The 50% and 95% threshold percentages are calculated by dividing the amount of submitted eligible claims with the electronic record indicator by the total amount of submitted eligible claims.

For example:

| # of Encounters | Submitted Code | Electronic Record Indicator | Eligibility                  |
|-----------------|----------------|-----------------------------|------------------------------|
| 60              | 5B             | ✓                           | Yes, on the approved list    |
| 40              | 5B             | x                           | No, indicator not selected   |
| 100             | 40B            | ✓                           | Yes, on the approved list    |
| 100             | 41B            | ✓                           | No, not on the approved list |

Based on this submission, the threshold calculation for this scenario is 80% (160 eligible claims with the electronic record indicator divided by a total of 200 eligible claims).

The EMR fee code indicator is a specific field in the billing portion of the EMR. Please contact your EMR vendor for details on how to set this field to default prior to your first billing submission.

If a physician works at multiple EMR clinics, the EMR monthly funding is paid out as a percentage at each location. For example, if a physician bills 60% of their claims at one location, 60% of the \$300 funding will be paid to them at that location and 40% will be paid at the second location.

## Introduction

The Electronic Health Record (eHR) is a provincially managed centralized series of systems which brings together a range of patient-based health information from across the health system. The eHR is managed by eHealth Saskatchewan. The eHR consolidates information such as prescription drug data, lab test results and diagnostic images (x-rays) and allows practitioners from across the system access to this information, on a need-to-know basis, to assist in their care of patients.

The Electronic Medical Record (EMR) is a software system used in physician offices that replaces paper-based health charts with an automated system that houses office visit and other health information and is able to download patient information such as lab test results, from their eHR. EMRs will also allow physicians to provide data re physician office visit information to the eHR for access by other providers who may also be caring for the patient as well as download relevant patient data (two-way interface).

The goal of an eHR combined with an EMR, is to have the right information in the right hands at the right time to make timely, effective health care decisions.

eHealth Saskatchewan works closely with the Saskatchewan Health Authority (SHA) in implementing computer systems in the province which support local care needs and integrate with the province's eHR strategy. It is similarly important that physicians have EMR systems in their offices to access the eHR information to improve local care delivery and fully realize the benefits of a province-wide eHR system.

eHR allow physicians to access a patient's most recent diagnostic images, lab test results, drug profiles, chronic disease histories and other critical information. Physicians can use this information in planning, documenting, and managing the patient's care through their local EMR.

The EMR Program is a jointly funded agreement launched in September 2009 between the Saskatchewan Medical Association (SMA) and the Ministry of Health (MoH). Either party may terminate this agreement by providing the other party twelve months written notice of its intent. The Program will continue to support physicians who have on the date of termination a binding financial commitment related to an approved EMR product. The funding support will not extend beyond three years from the date the notice of termination was written or the expiry date of the binding financial commitment whichever is sooner. The intent is to provide physicians with a reasonable opportunity to recover costs based on commitments made.

The SMA EMR Program is overseen by the EMR Co-management Committee. The EMR Program Co-management Committee has representation from the Saskatchewan Medical Association, eHealth Saskatchewan, the SHA, Ministry of Health and fee for service physicians.

The Committee will oversee the establishment and administration of the Saskatchewan Electronic Medical Records Program:

- Review the EMR Program and make enhancements as necessary to reflect changes in business processes, technology, standards, eHealth integrated services, physician needs or the vendor marketplace over time.
- Create and receive reports from Working Groups made up from the SMA, Ministry of Health and other stakeholders as necessary (i.e., SHA representatives).
- Review EMR Program eligibility criteria and policies, proposing changes as necessary.
- Adjudicate cases where physician eligibility is unclear.
- Receive and review financial statements for the EMR Program.
- Such other matters pertinent to the operation of the Program as may be agreed upon from time to time in consultation with the SMA Board of Directors or the Saskatchewan Ministry of Health.

### **Purpose:**

The purpose of the EMR policies is to establish and communicate standards for Program eligibility, enrolment, funding, privacy and security requirements and other areas necessary to provide safeguards and ensure physician responsibility is clearly defined. Physicians agree with the terms and conditions of these policies as a condition for SMA EMR Program funding.

### **Objectives:**

The objective of the EMR policy document is to clearly detail physician's obligations under the SMA EMR Program where compliance with policy is required.

EMR Program obligations such as fees or reimbursement payments that may be subject to negotiated change are not included in this document.

### **Scope:**

The EMR policies contained within this document identify physician obligations under the SMA EMR Program. With the integration of eHealth integrated services into EMRs, Joint Services Agreements will be signed and may contain additional security and other provisions to safeguard patient data.

### **Principles:**

The EMR Program is committed to basic principles which are used to guide the Program.

- All physicians engaged in the EMR Program are practicing licensed physicians within the province of Saskatchewan;

- Physicians who receive funding under the EMR Program will be required to disclose if any component of their medical record system is supported, either financially or technically, by SHA, the Ministry of Health or other publicly-funded agency;
- Qualifying physicians will receive Program benefits associated with the SMA EMR Program only;
- Physician clinics are responsible for the implementation of an EMR system and safeguarding of patient data including compliance with related legislation; and
- Physician clinics have met all of the criteria outlined in the SMA EMR Program.

### **Non-compliance:**

Where non-compliance with policy is identified or suspected, a review may be undertaken by the EMR Program with recommendations provided to assist the physician clinic in becoming compliant within a reasonable timeframe. Where deemed appropriate, by the EMR Co-management committee, participation in the program may be cancelled and funding no longer made available to the participating clinic or an individual physician within the clinic.

### **Monitoring and Audit:**

eHealth Saskatchewan together with the Saskatchewan Medical Association (SMA) through a negotiated agreement combined to deliver the Saskatchewan Electronic Medical Record Program is responsible to monitor and audit. The SMA EMR Program Manager reserves the right to audit physician clinics for compliance with the program policies contained within this document.

### **Interpretation:**

It is the responsibility of the EMR Co-management Committee to interpret these policies, except where the provision of these policies is specifically addressed within legislation.

An EMR Physician Escalation process has been developed and identifies how a disagreement or concern is to be raised:

- between the physician clinic and vendor (unable to resolve at the vendor level);
- with the Program in general; and/or
- between policies contained within this document.

Physicians will be asked to develop a written submission detailing the issue or concern and forward to the EMR Program Manager with the SMA. Where possible all issues will be resolved at this level. When deemed appropriate, the EMR Program Manager will escalate to the EMR Co-management Committee for a decision.

For non-EMR Program Funding inquiries, the current process is to contact the Medical Services Branch Inquiry Line at (306) 787-3475 or 1-800-667-7523.

New policies and changes or deletion of existing policies will be approved by the EMR Co-management Committee. Communication of such changes will be the responsibility of the EMR Program Manager.

## Physician Eligibility

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Most physicians in Saskatchewan are eligible for the SMA EMR Program. This includes family physicians and specialists in solo or group practice. The following criteria must be met in order to participate in the SMA EMR Program:

The physician:

1. has a clear clinical need for a longitudinal patient record within an EMR;
2. is a Saskatchewan fee-for-service or contracted physician responsible for the costs associated with the EMR;
3. is not receiving similar EMR funding from another province; and
4. is using one of the two approved Saskatchewan EMRs.

Physicians, who are considered ineligible by the EMR Program Lead by not meeting the above criteria, have the option to appeal the decision to the EMR Co-management Committee. To do so, a physician written submission must be developed and submitted in accordance with the EMR Physician Escalation process.

Physicians practicing through Primary Care sites will be supported through alternate program funds allocated for Primary Health Care (PHC) implementations and will adopt the same standards for integration with provincial EHR services as physicians participating in the EMR Program. Physicians who participate in the SMA EMR Program and later move to the PHC program can retain their existing EMR solution and remain eligible for the EMR Program funding.

*\*This policy does not prevent a physician from proceeding with an EMR implementation outside of the SMA EMR Program; however, funding will be contingent on meeting this and all other policy requirements of the Program.*

## Physician Responsibility and Support Services

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### Physician Responsibility:

Physicians engaging in the EMR Program will be responsible for the following:

- upfront costs associated with clinic engagement in the program and selection of a vendor (approved Saskatchewan EMR vendor list) that best meets their needs;
- upfront hardware and software costs of implementing an EMR (wide area network, network security, firewalls, communication devices and support services);
- obtaining the necessary vendor training for physicians and clinic staff to effectively use the new system;
- re-engineering clinic processes and roles (e.g., assigning a privacy/security officer) to accommodate electronic records and adapting to the new system;
- source and maintain 3<sup>rd</sup> party support and technology contracts for their clinic; and
- all on-going costs of maintaining their EMR system such as hardware or software upgrades or replacements.

All physicians whether self-employed, contracted or salaried, who receive funding under this Program will be required to disclose if any component of their medical record system is supported, either financially or technically, by the SHA, the Ministry of Health or other publicly-funded agency. In cases where such support exists, eligibility to receive payments will be reviewed on a case-by-case basis and may result in prorating of funding.

Notification of such support will be submitted in writing to the EMR Program Manager and assessed by the EMR Co-management Committee.

### Support Services:

The EMR Program Practice Advisors will assist physician clinics by providing program information, clinic implementation services such as privacy and security checklist, implementation, and planning and support with workflow analysis and troubleshooting as the clinic moves through the selection and implementation process.

The physician will receive EMR system support such as training, incident management and help desk support directly from their chosen vendor. Should issues arise that cannot be resolved between the physician clinic and the vendor, the escalation option is to provide a written submission in accordance with the Physician Escalation process to the EMR Program.

## Program Funding

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The intent of this policy is to clearly define physician financial responsibility for the implementation of an EMR and subsequent utilization to meet program compliance for payment.

Costs associated with the implementation of qualifying physician EMR software into physician practices within Saskatchewan is the responsibility of the physician. The services provided to assist the physician is the responsibility of the SMA EMR Program. These services are provided free of charge to the physician.

If separate funding for the same purpose including but not limited to, financial or technical support from the SHA, hospital, research grants or other groups, hardware provided at no charge and/or partial funding from another province is received, payment from the program may be evaluated and pro-rated.

To assist physicians with the cost of maintaining an EMR, funding is available to qualified physicians using an approved EMR solution. To qualify to receive payments, physicians must maintain a qualifying EMR system and utilize it to provide a longitudinal patient record which integrates with the province's EHR through standard interfaces as they become available.

Payments are designed to ensure that the electronic medical record is effectively utilized, and after implementation, shall include the following:

- The transactional service fee payment for EMR eligible fee codes, per physician payment, is conditional on entering the appropriate indicator on the individual billing transactions.
- The ongoing (i.e., monthly) SMA EMR Program reimbursement funding is conditional as defined in the funding section above.
- Excluded from the threshold calculation (50%, 95%) are EMR eligible fee codes where the service was provided in an in-patient or out-patient hospital location and billed through the physician practice EMR software. Detailed chart and other patient information were not entered into their EMR.

In addition, upon availability of eHealth integrated services and interfaces physicians must participate in the creation and provision of the shared patient record as defined by and pursuant to the terms and conditions identified for such services and in keeping with all relevant privacy and other legislation.

## Privacy and Security

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Privacy and security of confidential patient information is of the utmost importance. It is an expectation of the program that all Saskatchewan EMR implementations will comply with all applicable legislation including *The Health Information Protection Act* and the *Personal Information Protection and Electronic Documents Act*. Where the provisions of the legislation conflict with this policy, the legislation will prevail.

The following policies are recommended by the SMA EMR Program:

- Physicians are responsible for addressing areas of non-compliance and are responsible for any costs incurred to become compliant with the requirements.
- Physicians in group practices must have a formal written agreement outlining:
  - information sharing protocols and ownership of medical records and technology assets;
  - an exit agreement in place in case a physician leaves the group (i.e., moves to another practice, leaves the province, retires) which addresses trusteeship of confidential patient and other data contained in the EMR as well as disposal of technology assets.
- Established policies and procedures must be in alignment with all applicable federal and provincial standards, bylaws and legislation.
- In accordance with applicable legislation, physicians will ensure that appropriate policies and procedures are in place to provide patients with access to their personal health information when requested.
- Future integrated services will require privacy and security compliance contained within the Joint Services Agreements specific to the service offered.

## Physician Movement

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The expectation in all cases is physicians, during the implementation of an approved EMR, will establish an exit agreement to address the trusteeship of confidential patient and other data contained in the EMR, information sharing protocols and technology assets. The guidelines detailed below will not address items contained in physician exit agreements.

### Physician Movement EMR Practices

Physicians moving into an approved EMR practice from another approved EMR practice or non-EMR or non-approved EMR practice must follow the notification guidelines provided under the Information Sources section of the Saskatchewan Health Payment Schedule for Insured Services Provided by a Physician (often referred to as the Physician Payment Schedule.) This document can be located on the Ministry of Health website by clicking [here](#), and provides contact numbers for physician notification. In addition, the physician must complete the EMR Program – Application for Funding – Additional Physicians through the MySMA member portal ([click here](#)) and submit. By signing this document, you agree to the general terms and conditions of the SMA EMR Program and compliance with this policy document.

Physicians within an EMR practice who move out-of-province, retire or pass away must comply with all current legislation for the retention of medical records as mandated by the bylaws of the College of Physicians and Surgeons of Saskatchewan. In the case of death, this responsibility remains with the physician's estate. Further consideration should be given to additional retention times for medical records as per recommendations set out by the CMPA and the SMA.

### Physician Movement PHC Practice

An individual physician moving from an approved EMR clinic to a PHC practice would follow the same notification process as physicians moving between approved EMR practices.

Please note, if you are no longer responsible for the costs associated with your EMR solution, you are no longer eligible to receive EMR Program funding.

### Physician Movement When Utilizing eHealth Integrated Services

In all cases, physicians utilizing integrated eHealth services who are moving within approved EMR practices or out of an approved EMR practice must, prior to the change occurring, notify their EMR Practice Advisor or email the SMA EMR Program at [emr@sma.sk.ca](mailto:emr@sma.sk.ca).

## Acronyms

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| <b>Acronym</b> | <b>Definition</b>   |
|----------------|---|
| eHR            | Electronic Health Record  |
| EMR            | Electronic Medical Record   |
| MSA            | Master Service Agreement between the SMA and EMR Vendors                |
| MSB            | Medical Services Branch   |
| PHC            | Primary Health Care   |
| PIP            | Pharmaceutical Information Program                                      |
| RIS-PACS       | Radiology Information System – Picture Archive and Communication System |
| SHA            | Saskatchewan Health Authority   |
| SLRR           | Saskatchewan Laboratory Results Repository                              |
| SMA            | Saskatchewan Medical Association  |