Getting Started with Clinigence

This document describes the tasks needed by both Clinigence and the Partner to take a new practice live in the Clinigence application. Several tasks will be assigned to the Partner or Partner representative (shown in red outline in the graphic).

# New Site Workflow

Initial Customer Survey

Server-side setup

Setup incremental extractions

**Go Live**

Initial Mapping

Data Extraction & Load

Install ClinAgent on practice server

Request New CMO Setup

Support@clinigence.com

PQRS Consent  
Form

## Request a New CMO Setup

Request a new Care Management Organization (CMO) set-up by sending an email with the Initial Customer Survey information to [support@clinigence.com](mailto:support@clinigence.com):

1. Practice name, address, city and state
2. System credentials with Admin permissions
3. Practice administrator contact information (name, email address, phone number)
4. Practice technical contact information (name, email address, phone number)
5. List of providers for whom measures will be calculated
6. List of uses who will need credentials to access the Clinigence application (name, email address, phone number and role – Admin or Provider). Users assigned the Provider role will only be able to see his/her patient lists. Users with the Admin role will be able to see all measure scores and all patient lists. (The Organizational Admin role will be needed by the Implementations person, usually the Clinigence partner)
7. Number of patients at the practice (rough estimate)
8. Years of data in the EMR (rough estimate)
9. EMR and version number
10. Best time to run extractions (initial and daily) – try to avoid business hours and scheduled backups (needed by ClinAgent installation person, usually the Clinigence partner)
11. Program(s) required
12. Type of practice (Family Medicine, Pediatrics, Cardio, etc.)
13. Guideline mapping contact, this is generally a clinical staff or practice admin (name, email address, phone number)

## Submit PQRS Provider Consent Form

For the PQRS programs each provider who will be reporting must complete a consent form authorizing Clinigence to submit data on their behalf. (The form template is being created)

## Clinigence Server-side Setup

Clinigence will notify the Clinigence partner when the new site is setup and ready for installation.

## Install the ClinAgent

ClinAgent is a service which runs on the client computer. It periodically checks-in with the Clinigence server to determine if it has any work to do. The Clinigence partner will put data extraction events into the Clinigence server queue. ClinAgent will pick up these events, extract the requested data and send it to the Clinigence server for processing.

***The Clinigence partner is responsible for installing the ClinAgent on the CMO’s server.***

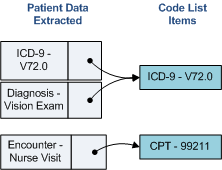
***Directions for installing the ClinAgent for your specific EMR(s) are found on the Clinigence Help Desk in the Solutions section.***

## Data Extraction and Load

During the initial data extraction, all patient data will be extracted from the database and sent via the ClinAgent to the Clinigence server. After the initial load you will often see several former providers or other staff personnel in the application Providers tab. Clinigence will disable these members based on the list of active providers in the original setup.

## Create Initial Mappings

The Clinigence engine uses a classification model in order to determine which patients qualify for a measure’s denominator and numerator. The description of each measure lists the Classes included in the measure and describes the filters used to qualify/disqualify patients for that class. In many cases, a Filter for a class will rely on a Code List of items such as ICD codes, CPT codes, LOINC, SNOMED, etc. The code list items are provided in the program documentation.

When patient data is loaded into the Clinigence system, many data items are automatically mapped to items in the Code Lists. This occurs when the match is simple and unambiguous, such as Birth dates from the patient profile, CPT codes matching numerically, and ICD codes matching numerically or by description. Other items must be mapped manually from the patient data to an appropriate Code List. This is generally accomplished by selecting the appropriate Domain for the patient data item (Diagnosis, Treatment, Vital Signs, etc) and searching for a counterpart in one of the Code Lists. Then the Clinigence Specialist mapping the data will determine what is a match based on description of the patient data item and the available code list item.  
  
          
  
As you can see from the graphic, several items in the patient data can be mapped to a single item in the code list.

Patient data that is documented in free-text fields or as comments are much more difficult to map than data documented in a structured format (such as selectable observation results, treatments and diagnoses). In addition, if the patient data is documented as text or assigned to an unexpected domain, it will **not be mapped**. For example, if the measure requires the patients to have a diagnosis of Diabetes and the patient data item is labeled “Notes” or "Reason" that item will **not** be mapped and the patient will not qualify for the measure.

### Follow-up Mappings

After the initial mapping is completed and the data has been re-processed, an iterative process will begin in which the Clinigence Specialist will work with the Mapping Contact (identified in the Initial Customer Survey) to refine the mappings and ensure that the reports are as accurate as possible.

## Setting Up Incremental Extractions

After the initial extraction and load and mapping phases are successfully completed, the Clinigence partner will need to schedule the ClinAgent to run a nightly incremental extraction. This incremental extraction will search for and extract only those records not previously extracted.

## Go Live

The Clinigence application should be populated and you should see the designated providers on the Providers tab.

The Clinigence Partner will be responsible for adding the practice’s users and assigning them credentials. Directions for adding new users are found on the Clinigence Help Desk.