

eClinicalWorks

INSTRUCTIONS FOR PRESCRIBER VALIDATION WITH SURESCRIPTS

Required information for providers utilizing eClinicalWorks for e-prescription



CONTENTS

Introduction	3
Overview	4
Summary	4
Correspondence Related to this Process	4
Requirements	5
Detailed Instructions	6
1 – Provider Info Window	6
2 – NPPES NPI Registry Validation	8
3 – Facility	8
4 – USPS and CASS Facility Validation	10
Additional Validation Resources	10
5 – Submit Updated Prescriber Data to Surescripts	11
Conclusion	12
Trademarks	13

Introduction

Surescripts® is enhancing its provider directory, which is where details of the network's prescriber and pharmacy information are stored. The emphasis will be on completeness and accuracy of provider data, and providing additional provider and pharmacy data. Surescripts is improving the manner in which it tracks multiple vendors and services at a given practice or pharmacy, thereby reducing duplication. Surescripts expects to deploy their new directory sometime during the first quarter of 2012, but this is subject to change since a final date has yet to be announced.

Each practice must review all provider and facility data for completeness, accuracy, and formatting within eClinicalWorks, in the NPPES NPI Registry, and against the US Postal Service Rules.

Ultimately, all providers using e-prescription through eClinicalWorks to must have valid provider data and facility data according to the NPI registry and USPS® address rules to be considered valid in the new Surescripts directory.

Please note that failure to comply may inhibit a provider's ability to e-prescribe medications once Surescripts deploys their new directory.

This document provides detailed information and instructions to ensure you are able to validate and update all pertinent provider data.

Overview

Summary

To ensure every provider in your practice contains complete, accurate information and that these data are formatted properly, it is imperative that you diligently follow each of the following steps.

1. Read and understand this guide thoroughly.
2. Review all provider data in eClinicalWorks for completeness, accuracy, and formatting. Update any data elements as necessary.
3. Review all provider data at the NPPES NPI Registry level for completeness, accuracy, and formatting. Update any data elements as necessary.

NOTE: There should be no discrepancies in the provider data entered in eClinicalWorks and the provider data contained in the NPPES NPI Registry.

4. Ensure all physicians include a Primary Service Location in their Provider Info window.
5. Review associated facility data for completeness, accuracy, and formatting. Update any data elements as necessary.
6. Validate all associated facility data against the US Postal Service rules and/or the Coding Accuracy Support System (CASS™) system using the reference links provided in this documentation.
7. Use the eClinicalWorks feature *Register e-Prescriber* within the application to update any provider data with Surescripts.

Correspondence Related to this Process

eClinicalWorks has created a dedicated e-mail address for correspondence related to this process. Please address any questions or issues that you may have to the following e-mail address:

eCW-SurescriptsDirectoryTransition@eclinicalworks.com

This address is reserved for eClinicalWorks clients and employees to submit questions or issues.

Requirements

Surescripts requires a set of data from each provider which can be aggregated into two categories: provider data and facility data. Surescripts also allows for additional fields to be submitted if present.

Surescripts REQUIRED Prescriber Data

1. Valid Prescriber Data

a. Name

- I. First
- II. Last
- III. Middle Initial

b. NPI

2. Valid Facility Data

a. Name

b. Address

- I. Address Line 1
- II. Address Line 2 (if applicable: i.e. suite)
- III. City
- IV. State
- V. ZIP Code

Additional Fields Submitted if Present:

- Valid Prescriber DEA
- Valid formats for phone, fax, and e-mail

Detailed Instructions

The eClinicalWorks application utilizes fields within two separate windows to extrapolate all the necessary prescriber data. All provider-specific data is located on the Provider Info window. Based on the provider's Primary Service Location specified in the Provider Info window, all facility data is contained in the Facility Info window (File -> Facilities -> select the facility in reference -> select *Update*). The following sections identify the fields within each of these two windows, which are extrapolated and sent to Surescripts along with information to validate each against the appropriate reference.

1 – Provider Info Window

The Provider Info window contains the pertinent provider data. This window is accessed from the Admin band in the left navigation pane. From the Provider Info window, click *Providers* and select a provider in reference.

Figure 1 presents a screenshot of the Provider Information window with the associated fields identified. The window must be completed in entirety and carefully reviewed for accuracy and formatting, and updated if necessary.

All fields outlined with a red box are required by Surescripts, while fields outlined with a blue oval are considered additional fields, which will be submitted if present. Each of the following fields outlined in either red or blue must be valid according to the NPPES NPI Registry.

IMPORTANT! Please ensure that the fields outlined below in the Provider Info window and the provider data in the NPPES NPI Registry are complete, accurate, and analogous. Discrepancies in either database will result in a prescriber error with Surescripts.

INSTRUCTIONS FOR PRESCRIBER
VALIDATION WITH SURESCRIPTS

Personal Info

Last Name *	First Name *	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Prefix	Suffix	Degrees/Credentials
<input type="text"/>	<input type="text"/>	<input type="text"/>
Taxonomy Code	Specialty	Provider Initials
<input type="text"/>	Select Specialty	<input type="text"/>
Date of Birth	Social Security No	Type
<input type="text"/>	<input type="text"/>	Select Type
DEA Number	DEA Active Date	DEA Term Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mailing Address	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>
Zip Code	Home Phone	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	Fax No.	Print Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Primary Service Location	Languages Spoken
<input type="text"/>	Test-Facility	English
Network Affiliation	<input type="radio"/> Male	<input type="checkbox"/> Resident
-Select-	<input type="radio"/> Female	

Tax ID Details

Tax ID Type

Social Security No. Employer ID Number Corporate name, but Social Security Number

Provider Tax ID :	NPI	UPIN
<input type="text"/>	<input type="text"/>	<input type="text"/>
EMCProviderID	Organization Type	Billing Facilities
<input type="text"/>	Select Organization Type	Select Facility
Medicare GRP# (or PIN#)	Medicaid GRP# (or PIN#)	Mammography Cert No.
<input type="text"/>	<input type="text"/>	<input type="text"/>
Champus GRP# (or PIN#)	Blue Shield GRP# (or PIN#)	Tax ID Suffix / Provider Site ID
<input type="text"/>	<input type="text"/>	<input type="text"/>

FIGURE 1. Provider Info window with associated Surescripts prescriber fields identified.

2 – NPPES NPI Registry Validation

Surescripts will validate Prescriber NPI data against the NPPES NPI Registry. In cases where there are inconsistencies with prescriber data in eClinicalWorks (which are submitted to Surescripts) and prescriber data in the NPPES NPI Registry, prescriber errors will present at the Surescripts level. eClinicalWorks has performed several case studies and identified some providers presenting errors within the Surescripts directory.

Upon detailed investigation, there were cases in which the eClinicalWorks/Surescripts data were actually correct, but the NPPES contained inaccurate data, therefore you **must** review these data in eClinicalWorks as well as the NPPES NPI Registry.

- Prescriber and practice NPIs are validated using the current NPI registry published by CMS, the National Plan and Provider Enumeration System (NPPES). The current file can be downloaded from http://nppes.viva-it.com/NPI_Files.html
- Prescriber and practice DEA numbers are validated using data obtained from the U.S. Dept. of Commerce's National Technical Information Service (NTIS). Information about registering for access to the DEA data download is available at <https://dea.ntis.gov/>

3 – Facility

Based on the facility specified in the *Primary Service Location* section of the Provider Info window, the associated facility data required or accepted by Surescripts will also be submitted.

Figure 2 presents a screenshot of the Facility Information window. Fields outlined with a red box are required by Surescripts, while fields outlined with a blue oval are considered additional fields and will be submitted if present (pay close attention to the Address Line 2 clarification noted below *Figure 2*).

Each of the following fields outlined in either red or blue must be valid according to the US Postal Service Rules and/or the CASS System.

Facility Information

Name: Test Facility

Type: Practicing Facility

Code: TF Primary Practice

Street Address: 123 Test Facility Name

Address Line 2: 3A

City: Westborough

State: MA Zip: 01581

Telephone: 555-555-5555 Fax: 555-555-5550

Start Date: 12/17/2009

Service Location Qualifies for Health Professional Shortage Area (HPSA) Incentive

HPSA Modifier (AQ/AR)

Exclude Charges from Patient/Guarantor Statements

FIGURE 2. Facility Information window with associated Surescripts prescriber fields identified.

NOTE: The Name field in eClinicalWorks will be transmitted to Surescripts as the Facility Name. This field has a 35-character limit at the Surescripts level; do not exceed this character limit in eClinicalWorks.

The Address Line 2 is required if applicable for particular facilities.

Example: if the USPS or CASS system indicates that your address is a building that requires a suite, then the Address Line 2 will be required. If your facility does not contain a suite, this field is not necessary.

4 – USPS and CASS Facility Validation

Surescripts has adopted the US Postal Service rules to validate facility address details, which are documented in USPS Publication 28 USPS Postal Addressing Standards and CASS system documentation. It is imperative that you ensure your facility address can be validated with either of these systems.

Links to the USPS Publication and CASS system respectively:

<http://pe.usps.com/cpim/ftp/pubs/pub28/pub28.pdf>

<https://www.usps.com/business/certification-programs.htm>

Examples of standardization applied include steps to:

- Correct the city and state if they are discernable
- Correct the ZIP Code if needed, based on other address content
- Add the +4 extension to five-digit ZIP Codes
- Correct the street name or street type
- Validate the building number and suite, floor, unit, etc. if necessary. (Some addresses require the suite)
- Standardize abbreviations for streets
- Standardize capitalization
- Add directional information for streets if needed – pre- and post-street name (N, S, E, W, NE, NW, etc)

Additional Validation Resources

A link to a web-based address validation tool hosted by MelissaData, a CASS-certified vendor of address validation tools, is listed below. The page enables an address to be entered, determines if it is valid according to the USPS rules, and then provides detailed information about any validation errors that might be present. The validation rules applied on this site are consistent with those used in Surescripts migration reports.

<http://www.melissadata.com/lookups/addressverify.asp>

A similar tool is available on the US Postal Service website. The primary purpose of this tool is to look up or validate ZIP codes, but it also reports any errors present in entered addresses.

<http://zip4.usps.com/zip4/welcome.jsp>

5 – Submit Updated Prescriber Data to Surescripts

Once all provider and facility data have been reviewed and updated appropriately, these data **must to be updated with Surescripts**. eClinicalWorks provides a prescriber update feature within the Register e-Prescriber window (Figure 3), which can be accessed from Register e-Prescriber option under the Tools menu.

Identify all appropriate providers to update within the *Surescripts – Retail* category, select the check boxes in the Update (U) column, or select all, then select *Apply*. This will send an update transaction to Surescripts for the selected provider(s) and the pertinent data fields. Multiple providers may be updated with a single transaction.

Service Level: Surescripts-Retail Surescripts-Mail-Order

When registering a provider for e-prescribing to retail pharmacies, the following service levels are enabled by default: new medications; medication eligibility; medication history (this is reflected by the mandatory selection of the corresponding check boxes below). **Please indicate if you would like to receive electronic refill requests from retail pharmacies:**

New Medication Medication Refills
 Medication Eligibility Medication History

Effective Dates:
The effective dates entered will apply to all providers selected upon registration. If any provider requires different effective dates, register this provider separately. (Please note: The effective dates do not pertain to the deactivation feature).
Start Date: End Date:

Provider:

Show: **ALL** Registered Non-Registered

R	MR	U	Provider Name	SPI No	Status	Surescripts-Retail Registration	D
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ONES, MARY	6510971190001		Response	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Willis MD, Sam	6952656604001			<input type="checkbox"/>

FIGURE 3. Register e-Prescriber window with the Update feature identified.

IMPORTANT! This is a critical step. Failure to perform this step will prevent the prescribers' updated information from being provided to Surescripts.

Conclusion

Surescripts is making some desirable enhancements to their prescriber directory. These changes should be considered a benefit to prescribers and pharmacies. It is important that all eClinicalWorks prescribers are aware of the required data fields, review all the pertinent fields within the eClinicalWorks application, validate their provider and facility data with NPPES and the US Postal Service rules respectively, and to update any inaccuracies or inconsistencies.

If a practice fails to take these steps, and prescriber data errors remain in the Surescripts directory, the prescriber in error may be a risk of being omitted from the new Surescripts directory. This may inhibit the prescriber's ability to e-prescribe until these validation errors are addressed.

Surescripts projects that this migration will be performed during the first quarter of 2012. eClinicalWorks has a goal to ensure all providers are validated with Surescripts by the end of 2011.

NOTICES

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