

Step-by-Step Guide: Joining the Surescripts Network for Clinical Interoperability

Instructions for GE Centricity® Secure Messaging Users



Welcome!

GE Customer –

Since 2004, Kryptiq and GE Healthcare have closely partnered to provide a wide range of tools and technologies to the users of GE's clinical systems, including the industry leading Secure Messaging platform that thousands of GE users utilize every day.

Last October, Kryptiq announced a partnership that will make this Secure Messaging platform even more powerful for GE's customers.

At MGMA, Surescripts and Kryptiq announced a partnership that will allow Surescripts partners to enable the nationwide exchange of health information through new clinical messaging services. This new network utilizes Kryptiq's technology and Surescripts' proven certification programs and the close vendor partnerships that have helped expand ePrescribing to hundreds of thousands of providers. The announcement of this new network service, dubbed the Surescripts Network for Clinical Interoperability, was widely hailed by health care professionals and health IT experts alike.

As a result of this partnership, GE users will now have the ability to use their existing Secure Messaging accounts to communicate with more partner providers and organizations than ever before, including those providers utilizing a Direct Project address.

As a user of GE Centricity, GE, Kryptiq and Surescripts are excited to offer you a special and exclusive offer;

Join the Surescripts Network for Clinical Interoperability before the end of 2011 and receive network access, free of charge, for up to two years.

This guide was put together to make it as easy as possible for you and your organization to take advantage of this offer and includes FAQs and complete step-by-step instructions within this Easy Guide.

We've worked to make joining the Surescripts network as easy as 1-2-3. However, if you have any questions, please do not hesitate to contact your Secure Messaging support representative or me directly.

I look forward to working with you to connect you electronically with your business colleagues and partners.

Sincerely,



Nathan Loveless

Director of Marketing


Kryptiq Corporation

GESignup@kryptiq.com

503.906.6327

Easy Guide Checklist

To help track the process, here is a checklist of the entire process to help your organization manage joining the Surescripts Network.

Completed	To Do List	Go To Step
	Received the Easy Guide	
	1. Sign the Surescripts Subscription Agreement	
	Sign and send the Subscription Agreement for the Surescripts Network for Clinical Interoperability to support@kryptiq.com	Page 6
	2. Configure Secure Messaging to communicate with the Network	
	Ensured Secure Messaging has been updated to version 4.4 or higher	Page 6
	Ensured that Secure Messaging / Patient portal configuration tool is properly configured	Page 6
	3. Create Surescripts Directory entries for the providers in your organization	
	Requested (from support@kryptiq.com) and received a pre-populated list of your organizational and provider data for inclusion in the Surescripts Directory	Page 8
	Submitted a reviewed provider list to support@kryptiq.com	Page 10
	Received a confirmation email and validated access to the network by activating the directory and viewing your organizational entries	Page 10

FAQ's

What are the specific terms of the offer to GE customers to join the Surescripts Network?

GE Secure Messaging customers who chose to join the Surescripts Network before the end of 2011 will receive network access for no charge until the 2013 anniversary of their Secure Messaging Maintenance Renewal.

What are the benefits of joining the Surescripts Network?

By joining the Surescripts Network, your organization will gain:

- Access to a shared, searchable **directory** of all Surescripts Network participants.
- Automatic **Certification** to the Surescripts Network, ensuring that messages traveling across the Network will reach their destination and that messages you receive will follow specific terms and conditions consistent with the display and handling of patient data.
- Support for Stage 2 and 3 **Meaningful Use** requirements as they emerge.

Who can my organization communicate with on the Surescripts Network?

Using the Surescripts Network, providers and their staff can communicate with:

- **Other providers and organizations on the Surescripts Network.**
All users on the Surescripts Network have agreed to exchange clinically relevant messages with one another across the network. Since all of these providers are represented within the Surescripts Directory, your organization and its providers will be able to quickly identify other users with whom you can communicate.
- **Other providers with a Direct Project inbox.**
Access to the Surescripts Provider Directory also enables Secure Messaging to act as a Direct Project compliant mailbox, enabling Secure Messaging users to send and receive messages from other Direct Project compliant solutions.

How does the Surescripts Network relate to the Direct Project?

The Surescripts Network is completely compliant and complimentary with the Direct Project protocols. Members of the Kryptiq technology team have been deeply involved with the development of the Direct Project, including donating time and code for the production of the specification. This means that any GE Secure Messaging user on the Surescripts network will also be able to exchange messages to communicate with any other Direct SMTP email account.

But the Surescripts Network also provides additional benefits, above and beyond a standard Direct deployment, including:

- Access to the provider directory
- Guaranteed delivery of messages across the network
- Centralized management of Business Associate Agreement relationships, and all the other complexities inherent in creating and managing a own peer-to-peer network

Kryptiq will inform all of the users accessing the Surescripts Network via Secure Messaging of their Direct compliant addresses at a later date.

Who else has chosen to join the Surescripts Network?

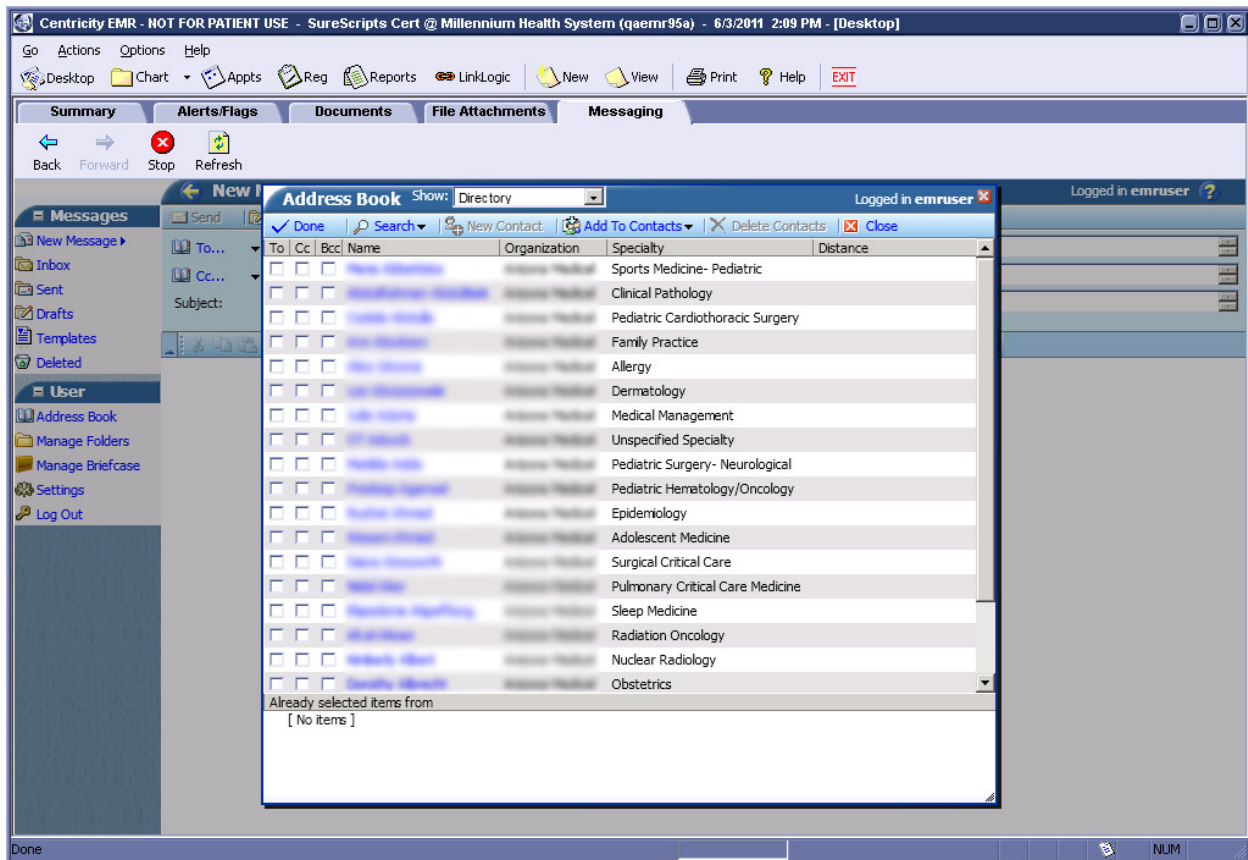
The market has already responded positively to the announcement of the Surescripts Network for Clinical Interoperability. In addition to Kryptiq, GE, and Surescripts reaching out specifically to users of GE Secure Messaging, the following organizations have also signed up to utilize the Surescripts Network:

- **American Association of Family Physicians (AAFP)** announced in February of 2011 the creation of AAFP Physicians Direct, a new service that supports secure, electronic communication between physicians. This clinical messaging portal was built using Kryptiq technology and will enable the more 75,000 family physicians, as well as the specialty providers they work with in the care of their patients, to access the Surescripts network. (More information at <http://surescripts.com/news-and-events/press-releases/2011/february/aafp-physicians-direct.aspx>)
- **AmazingCharts, eMDs, SOAPware** also announced, in conjunction with the AAFP Physicians Direct portal, that they would be integrating their EHRs to the Surescripts Network.
- **MinuteClinic** retail clinics have been using this technology and the Surescripts Network for more than two years to electronically send patient visit summaries from the retail clinic back to the patient's primary care provider.
- The **Centers for Disease Control and Prevention (CDC)** awarded Surescripts a \$5 million grant to utilize the Surescripts Network for Clinical Interoperability to connect more than 500 hospital labs to public health agencies to transmit data on reportable laboratory results. (More information at <http://surescripts.com/news-and-events/press-releases/2011/february/cdc-lab-grant.aspx>)

What will change in Secure Messaging, if anything, when I join the Surescripts Network?

The short answer: not much.

All of your Secure Messaging workflows for patient communication, encounter form integration, even the UI of the Messaging Tab will remain the same. What will change is the number of organizations and providers you will be able to communicate with. This change will be represented by the ever growing list of providers in the Surescripts Directory Address book within Secure Messaging.



What do I have to do to join the Surescripts Network?

Joining the network involves three easy steps. The rest of this document outlines those steps, but if you have any questions, please feel free to contact your support representative or Nathan Loveless.

- GE Customer Support Number: 1.888.436.8491, Opt. 1, then Opt. 5
- Kryptiq Support Number: 1-866-906-6300 (toll free)
- Nathan Loveless: 503-906-6327, GESignup@kryptiq.com

Step-by-step Guide

Kryptiq has worked to make joining the Surescripts network as easy as possible for customers of our GE-integrated solutions. It only takes three steps to be a full participant on the Network.

1. **Sign the Subscription Agreement to the Surescripts Network for Clinical Interoperability**
2. **Ensure Secure Messaging is configured to communicate with the Network**
3. **Create Surescripts Directory entries for the providers in your organization**

Once you have completed these three steps, your organization will be visible to other Surescripts Network participants and can begin sharing documents and messages with other providers on the Network.

Step 1: Signing Subscription Agreement

There is one document that must be signed prior to your organization sending messages across the Surescripts Network from an existing Secure Messaging Installation. This is:

- **Subscription Agreement to the Surescripts Network for Clinical Interoperability**
 - **NOTES: this document includes a HIPPA Business Associates Agreement**

This agreement is similar to those being signed by all other users on the Surescripts Network, and ensures that you and other messaging participants are able to easily share clinical documents without the nuisance of spam and other unsupported communications.

These documents can be found in Appendix A of this Easy Guide.

[Click here](#) for Subscription Agreement.

Please sign and send back to either support@kryptiq.com or fax them to 503-858-6100.

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Step 2: Configure Secure Messaging to Communicate with the Network

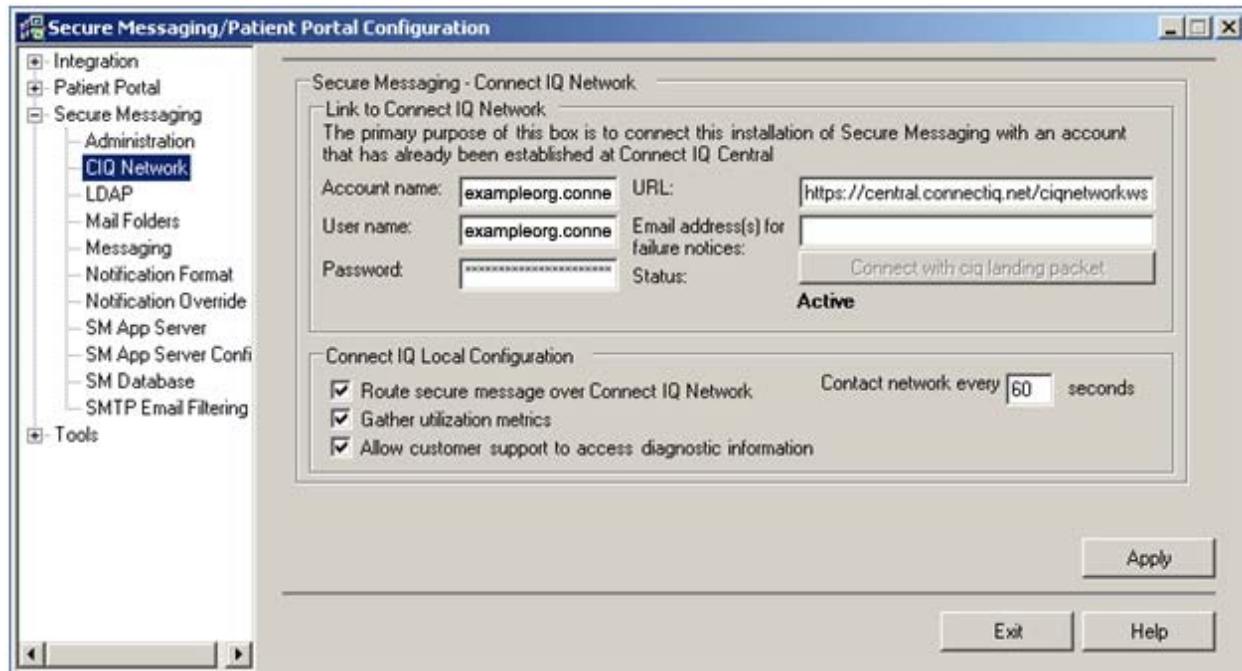
To begin sharing messaging across the Surescripts Network for Clinical Interoperability you will need to ensure that your organization is currently running a Network-supported version of Secure Messaging and that this installation has been properly configured to talk to the Surescripts Network. All versions of Secure Messaging **version 4.4 or later are currently supported** for network connectivity.

Many organizations also have the necessary configurations already appropriately setup, making this process a quick settings check for the Secure Messaging administrator.

To see if your organization is currently set up to send and receive Surescripts Network traffic:

- Open the Secure Messaging / Patient Portal Configuration tool on your Secure Messaging server.

- Navigate to the “CIQ Network”¹ screen under the Secure Messaging menu. You should see a screen like this:



- To verify you are connected to the Surescripts Network, ensure that the field **Status:** has the word “**Active**” displayed below the “**Connect with ciq landing packet**” button. If your configuration does not read as “**Active**” please contact your support representative for assistance with configuration.
- Finally, ensure that the checkbox next to “Route secure message over Connect IQ Network” is checked.

NOTE: Changing this setting when the Secure Messaging account is connected to the Surescripts Network, will route all messages across the Network, including patient messages. If a patient is an employee of your health system or another health system on the Surescripts Network, changing this setting will cause messages intended for the patient to flow across the Network to the [other messaging system](#). For this reason, we strongly suggest that all Patient Portal and Secure Messaging customers require that patients not use work email associated with a health organization for the Portal accounts.

If the previous settings appear to be appropriately configured, take a screenshot of the configuration window referenced above and send it to support@kryptiq.com or to GESignup@kryptiq.com. This will help ensure that your configurations are valid.

If the previous settings are not set up, please contact your support representative. To expedite this process, please be prepared with the following information:

¹ The “Connect IQ Network” was the branding historically associated with the ability to send messages to other Secure Messaging users enabled with Kryptiq’s server-to-server capabilities. As the partnership with Surescripts, the CIQ Network displayed here represents the broader Surescripts Network for Clinical Interoperability. Future releases of the product will be updated to represent this configuration as Surescripts Network configuration.

- **URL to your Secure Messaging website**
- **Your Organizational Domain:** This domain must be wholly owned by your organization.

An example of these pieces of these two pieces of information would be:

- **URL:** secure.exampleorg.com
- **Organizational Domain:** exampleorg.com

Once this is configured, you only have one more step until you are ready to begin sending and receiving messages across the Surescripts Network.

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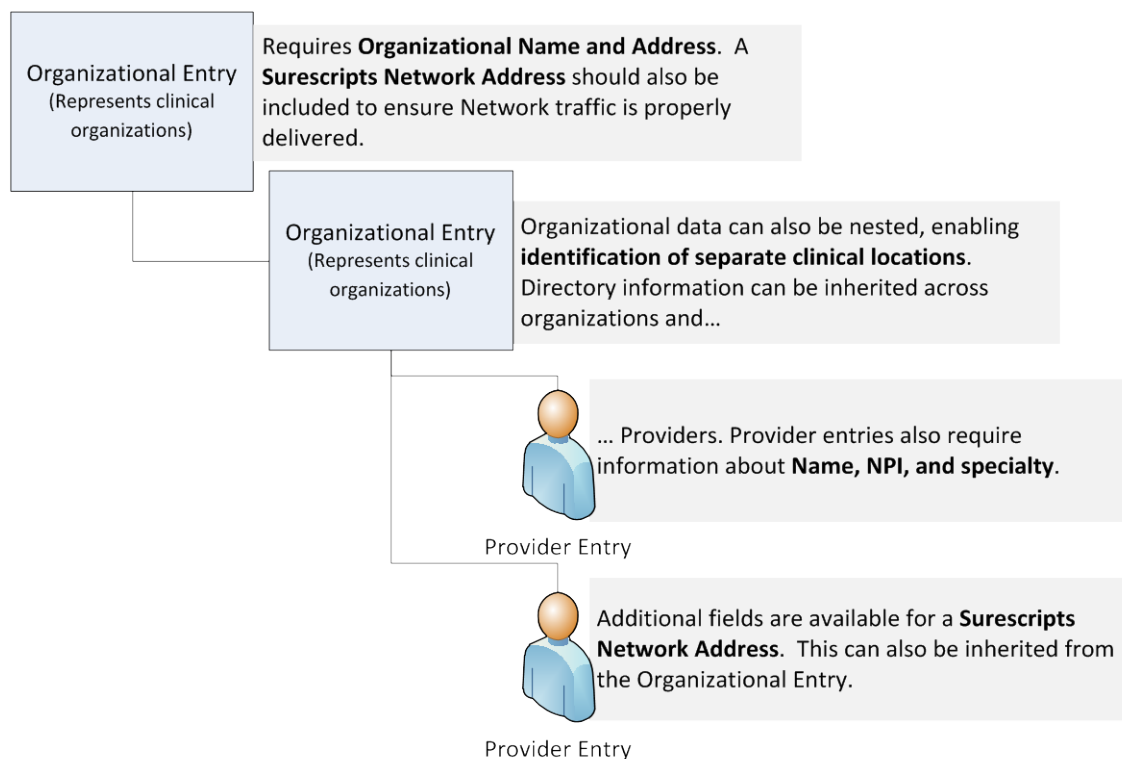
Step 3: Create Surescripts Directory Entries for the providers in your organization

The last step in joining the network is adding entries for your organization and its providers to the Surescripts Network. This enables other members of the Surescripts Network for Clinical Interoperability to know you are participating on the network and to send appropriate messages to your organization.

We will work with you to help make the creation of this list of organizations and providers as easy as possible by providing your organization with a pre-populated file containing provider information derived from your organization's Advanced ePrescribing database. This will be sent to you as soon as we have received the two signed documents referenced earlier in this document. In most cases, this will enable you to review and modify the list, as opposed to creating it from scratch. If you have not currently deployed Advanced ePrescribing, please fill out the [provider directory template](#). If you need assistance, reference the [example directory template](#), or contact [support](#).

To be added to the directory, we will need a set of unique pieces of information for each organization and provider, including general data about the organization and specific data about each provider.

Entries in the Surescripts Network



Organizational Data Needed for the Surescripts Network:

NOTE: Items marked with an asterisk* are required to publish the entry into the directory. In the case of the “Specialty”, this must be one of the AMA approved specialty identifiers.

- **Organization ID**, is used to map organizations to either other sub-organizations or providers. Use any pre-existing value that may be present;
- **Organization Name***, represents how providers are grouped within the directory. For example, Eastside Clinic which is part of a larger IDN could be used to identify the providers who work at that location. Please enter the organization name you would like associated with the provider;
- **Parent Organization ID**, represents a grouping of other organizations, such as an IDN. While there is no directory limit to the number of nested organizational levels, most organizations will group based on one or two levels of organizational associations. Enter the parent “Organization ID” or if none exist, the parent organization name;
- **Address***, including street address, city, state, zip, and country. State should be the two character abbreviations and Country will be ‘US’. We support both 5-digit and 7-digit zip codes;
- **Telephone and Fax** are the contact information used for external communications. These are for information purposes only;
- **Inherit Network Address***, dictates if a network address is pulled from an associated parent organization. This value should be TRUE or FALSE, TRUE indicating that the address is adopted;
- **Organization Network Address**, which represents the generic Surescripts Network address for the organization as a whole. This address will look like an email address. Providers

within this organization can also inherit this address for incoming messaging. The address should belong to the organization domain previously provided, for example “referrals@exampleorg.com” for referrals to our example practices.

Provider Data Needed for the Surescripts Network:

- **NPI***, which represents the National Provider Identifier for the provider;
- **Organization ID***, which represents the organization where the provider is associated, the Organization Name should be used if the “Organization ID” field is blank;
- **Prefix**, which is an optional field for a formal salutation;
- **First Name*** of the provider;
- **Middle Name** of the provider;
- **Last Name*** of the provider;
- **Suffix**, which is an optional field for a formal salutation. There is a 10 character limit;
- **Network Address**, which identifies the specific Surescripts Network address for the provider. This address will look like an email address. For most providers, this will be inherited from the organization, the address should belong to the organizations domains previously provided such as DrBob@exampleorg.com;
- **Inherit Network Address**, which identifies if an Organizational Network Address is inherited as the Network Address for the provider. Value should be TRUE or FALSE. If FALSE then Network Address should be populated;
- **Specialty***, which indicates the clinical specialty of the provider. Please use the AMA approved abbreviation codes included in the template only, Please use 'Other Specialty' (OS) if the provider’s specialty isn't in the AMA list.

Please submit the reviewed and approved list of providers to support@kryptiq.com.

Keeping your Directory Entries Up-to-date

As providers and organizational relationships change, we understand that there will be a need to add, change, or delete your existing entries. If you need to update these entries at any time, simply send us an updated spreadsheet of your provider and organizational entries, inclusive of both those entries that do not require adjustment in addition to those that do.

We will use this file to update your entries and send you a message when the edits have been applied.

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Congratulations, you are on the Surescripts Network!

Once we have received and entered your organization’s directory information, a support representative will send you a confirmation email. This email will both welcome you onto the Surescripts Network and tell you how to access the Surescripts Directory so you can validate that your organizations’ entries are present and correctly loaded.