

# CY 2022 Real World Testing Report

**Tebra Technologies, Inc / Kareo EHR**

## Executive Summary

This is the test report for CY 2022 real world testing for version 4.1 of our Kareo certified EHR solution. This is the companion document to our CY 2022 real world test plan that describes our approach for conducting real world testing in CY 2022 and the testing measures we employed.

We completed our testing using version 4.1 of our product as stated in our CY 2022 test plan, and our results show that the EHR is working in our production environment as it was certified. For each of our CY 2022 Real World Testing Measures, we have recorded our findings and provide some analysis on their interpretation. We did not discover any non-conformities or errors while testing.

Since we completed this testing, we have certified version 5.0 of our EHR to the Cures Update requirements which will be the version used in CY 2023 testing efforts. We will continue to build on the real world testing efforts with this new version this coming year.

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## General Information

**Plan Report ID Number:** Kareo-RWT-2022

**Developer Name:** Kareo, Inc.

**Product Name(s):** Kareo EHR

**Version Numbers(s):** 4.1

**Certified Health IT Criteria:** 315(b)(1)-(3), (b)(6), (e)(1), (g)(7)-(10)

**Product List (CHPL) ID(s) and Link(s):**

- 15.04.04.2777.Kare.04.01.1.210101
- <https://chpl.healthit.gov/#/listing/10517>

**Developer Real World Testing Page URL:** <http://www.kareo.com/macra>

# Timeline and Milestones for Real World Testing CY 2023

- **First Quarter 2022:**
  - Begin communication with clients to ask for their support and participation in real world testing. The goal is to have a sufficient number of clients committed for real world testing by the end of 1Q-2022.
  - Status: MET
- **Second and Third Quarter 2022:**
  - During the 2nd and 3rd quarter of CY 2022, the real world testing with clients will be scheduled and performed. It is expected that a preparatory call will be done with clients to prepare them for testing activities. Results will be documented in the test results section of the test methods and ultimately used to build the test report. If any non-compliances are observed we will notify the ONC-ACB of the findings and make the necessary changes required.
  - Status: MET
- **Fourth Quarter 2022:**
  - During the last quarter of the year, the CY 2023 real world test plan will be completed according to the ONC and ONC-ACB requirements and expectations. Test plan will be prepared for submission before the end of the year.
  - Status: MET
- **First Quarter 2023:**
  - Submit RWT Test Report to ONC-ACB.
  - Status: MET

# Standards Version Advancement Process (SVAP) Updates

For CY 2022 RWT testing, we did not do any SVAP updates for this version of the EHR. Since completing RWT testing, we have achieved Cures Update certification to include USCDI v1 into our product and certify on FHIR v4 and SMART on FHIR through our 315(g)(10) certification.

Standard (and version)	N/A
Updated certification criteria and associated product	N/A
Health IT Module CHPL ID	N/A
Method used for standard update	N/A
Date of ONC-ACB notification	N/A
Date of customer notification (SVAP only)	N/A
Conformance Measure	N/A
USCDI-updated Certification criteria (and USCDI version)	N/A

# RWT Measure #1: Number of Transition of Care C-CDAs Successfully Sent

Associated Criteria 315(b)(1)

Testing Methodology Reporting/Logging

### Measurement Description

This measure is tracking and counting how many C-CDAs are created and successfully sent from the EHR Module to a third party during a transition of care event over the course of a given interval.

### Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

### Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* Number of C-CDAs Successfully Sent
- *Total C-CDAs Sent for all Clinics:* 0

### Analysis and Key Findings

Our customers typically are not creating C-CDAs for other providers so we have no metrics for this measure, but we did confirm this certified EHR module is working in a production-simulated environment through internal testing efforts. This includes testing of our relied upon software HISP Updox (version 2016.1).

### Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.

# RWT Measure #2: Number of C-CDAs Received and/or Incorporated

Associated Criteria 315(b)(2)

Testing Methodology Reporting/Logging

## Measurement Description

This measure is tracking and counting how many C-CDAs are successfully received and/or incorporated upon receipt from a third party via direct messaging during a transition of care event over the course of a given interval.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* Number of C-CDAs Received
- *Total C-CDAs Received all Clinics:* 0

## Analysis and Key Findings

Our customers typically are not receiving C-CDAs for other providers so we have no metrics for this measure, but we did confirm this certified EHR module is working in a production-simulated environment through internal testing efforts. This includes testing of our relied upon software HISP Updox (version 2016.1).

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.

# RWT Measure #3: Number of NewRx Prescription Messages Successfully Sent

Associated Criteria 315(b)(3)

Testing Methodology Reporting/Logging

## Measurement Description

This measure is tracking and counting how many NewRx electronic prescriptions were created and successfully sent from the EHR Module to a pharmacy destination over the course of a given interval.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* NewRx Messages Created
- *Total NewRx Msgs for all Clinics:* 2813

## Analysis and Key Findings

Our ePrescribing is a very popular and widely used feature in our EHR. Our testing also reveals our third party relied upon software eRx provider DrFirst Rcopia is fully integrated and working with our EHR.

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.



# RWT Measure #4: Number of Patient Batch Exports Run

Associated Criteria 315(b)(6)

Testing Methodology Reporting/Logging

## Measurement Description

This measure is tracking and counting how many batch exports of C-CDAs were successfully performed by the EHR Module over the course of a given interval.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* Number of Patient Batch Exports Run
- *Total Batch Exports for all Clinics:* 0

## Analysis and Key Findings

Our customers do not regularly share data through C-CDA files so it is not surprising that they do not do batch exports of C-CDAs.

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.

# RWT Measure #5: Number of Patient Given Access to Portal

Associated Criteria 315(e)(1)

Testing Methodology Reporting/Logging

## Measurement Description

This measure is tracking and counting how many patients are given login access to their patient portal account over the course of a given interval.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* Number of Patients Given Access to their Portal
- *Total Patients Granted Access for all Clinics:* 84

## Analysis and Key Findings

Existing patients already had access to their portal account so these metrics were focused on new patients seen for the provider. Portal access does require the provider to initiate the setup so some providers may choose to not do this setup which impacts our results.

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.

# RWT Measure #6: Number of Patient Who Accessed/Logged into Portal

Associated Criteria 315(e)(1)

Testing Methodology Reporting/Logging

## Measurement Description

This measure is tracking and counting how many patients have successfully logged into and accessed their patient portal account over the course of a given interval.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

- *Clinics Reporting:* 3
- *Reporting Interval:* 3 months
- *Testing Metric/Measurement:* Patients Who Accessed their Portal Account
- *Total C-CDAs Sent for all Clinics:* 26

## Analysis and Key Findings

While we did not discover any portal access errors, the number of patients who accessed their patient portals was relatively low given the overall patient population of the clinics. We will look to work with the provider community on how to encourage more portal access to their patient population.

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.

# RWT Measure #7: Number of 3rd party applications connecting to our EHR

Associated Criteria 315(g)(7)-(g)(9)

Testing Methodology Reporting/Logging

## Measurement Description

This measure use care will document the number of third party applications which connect to our EHR using our API functionality with our sampled client users.

## Care Settings

Kareo EHR is primarily targeted to small practices, general ambulatory practices and our measure was designed for this setting.

## Testing Results

*We queried our customer base and inquired if any were using the API for patient access. No clinics reported using, registering and/or approving any third party applications for API production access.*

## Analysis and Key Findings

Based on our testing, our customers' patients are not using the third party API for their data access as we had no applications registered for API access. Instead, we did a test of our API connection and confirmed it did work in a production-simulated environment. We are using the third party SmileCDR for the Cures g.10 API criteria. Our results reveal this certified EHR module is working as certified without any non-compliance errors.

## Non-Conformities or Errors Discovered

During our testing, we did not discover any errors or criteria non-conformities. We did not make any changes to this measure from our original test plan.