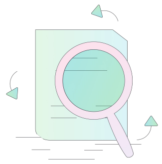
Vim Clinical Data Exchange | Guide for Clinics

Vim has developed a clinical data exchange product that has been installed at your clinic (step 1, complete!). If you've had a chance to review our **Vim Clinical Data Exchange Overview**, you've seen the details behind how our product works across the payer, vendor, and provider ecosystem. ***We strive to make the process of patient chart extraction for the purposes of risk adjustment audits as automated and seamless as possible.***



Vim Clinical Data Exchange runs in the background: as part of running the data extraction process, we've installed Vim Clinical Data Exchange on your Vim Connect hub - you can see this as another Vim application alongside your other Vim tools. This application allows us to automatically extract charts during active user sessions without any effort from you.

We have also created a user interface application that you may engage with (your clinic will provide additional guidance around user roles, as needed). This interface allows you to:

- **View** open chart requests
- **Take action**: reject open chart requests as needed (think: self-paying patients, omnibus rule cooperation etc.)
- **See history** of chart requests and their statuses (shared when to which data requester, rejected by who, processing, failed and more)

Vim Clinical Data Exchange provides great value across all user types:

Vim Administrator:
- Receive notifications for incoming patient chart requests via email

CDE Application User:
- Access and review patient chart request details directly in the EHR (vs. offline, fax, or otherwise)
- Reject specific patient chart requests, as needed, directly in the EHR

For a detailed walkthrough of Vim Clinical Data Exchange see the guide that follows.

Vim Clinical Data Exchange

Which charts will be requested for extraction?

As you know, patient charts may be requested by a health insurer or third party organization for a number of different reasons relating to risk adjustment audits. Vim works alongside these companies and directly with provider organizations to ensure these extractions are as seamless as possible.

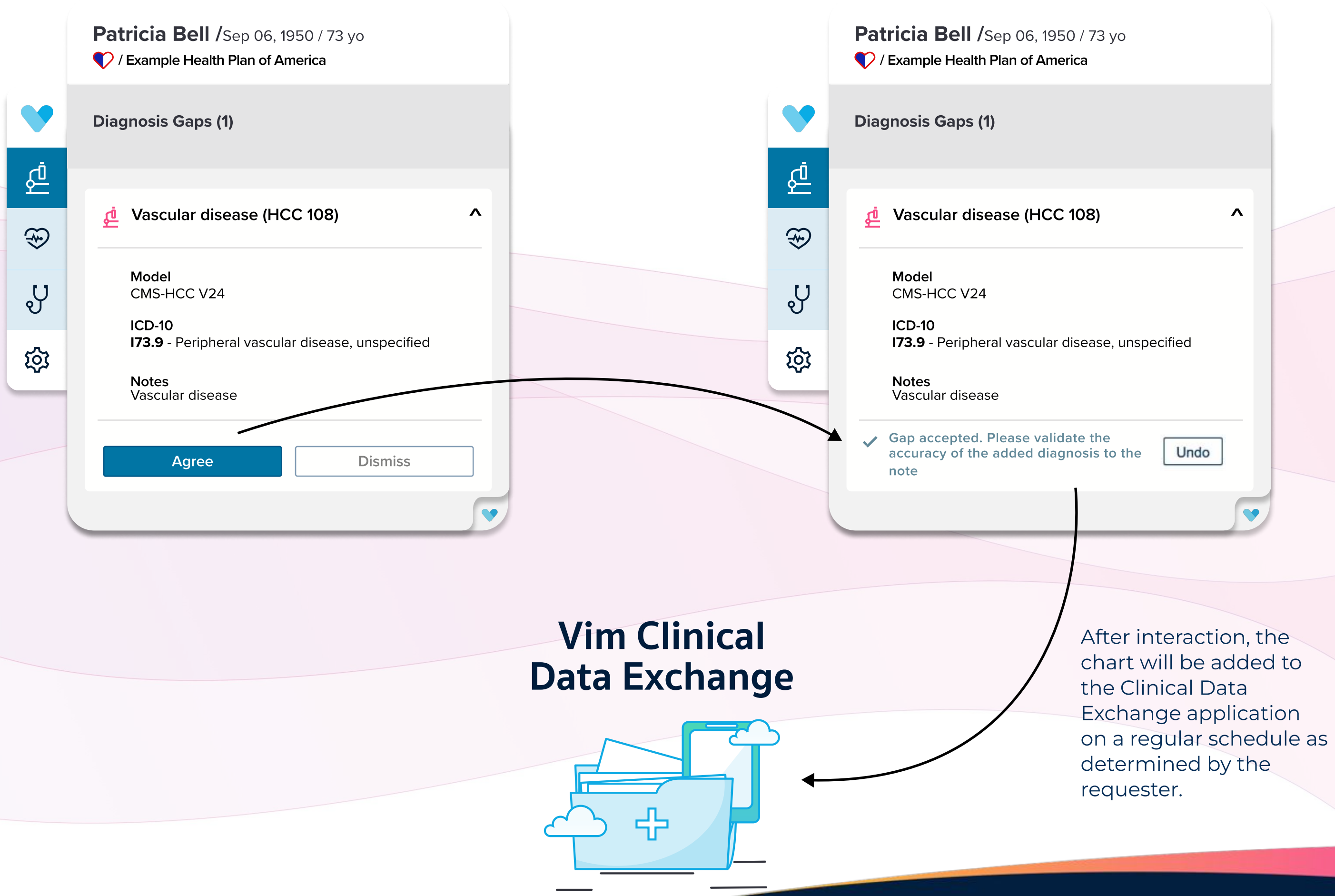
For determining which charts are requested, there are currently two options:

Designated list

Health insurers and third party organizations operating on their behalf will send Vim a designated list of patient charts to be extracted. When this happens, Vim will populate these requests within the **Data Exchange** application for your review.

Following gap interaction

When you interact with a diagnosis gap within the **Vim Diagnosis Gap application** during an active encounter, Vim will add this patient's chart to the request queue for your review. Through this workflow you are able to save yourself the headache of revisiting patient charts in the future for extraction when requested by a health insurer and significantly cut down your audit document gathering process.



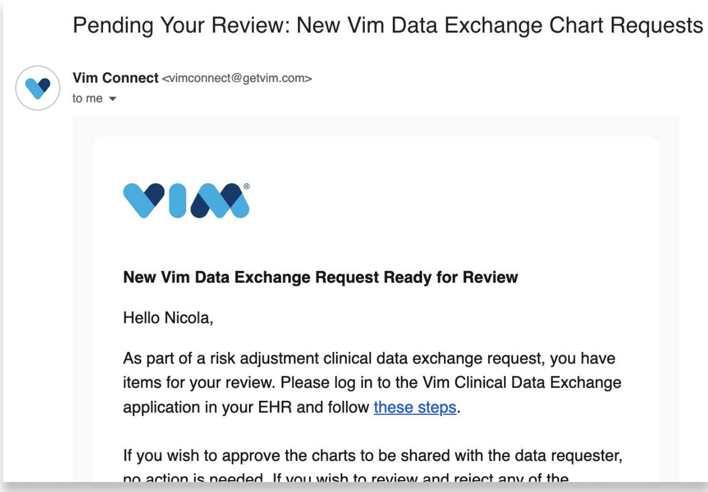
Vim Clinical Data Exchange - Application Walkthrough

1 Add users to the application

Within the Admin User Console, you can add the Vim Clinical Data Exchange application to the desired users. **For full instructions, see here.**

2a Notification - Email

When there is a request for a patient's chart, any user designated as an "Admin" at your clinic will receive an email to let them know they can review the chart request within the next 3 business days.


Pending Your Review: New Vim Data Exchange Chart Requests

Vim Connect <vimconnect@getvim.com>
to me

New Vim Data Exchange Request Ready for Review

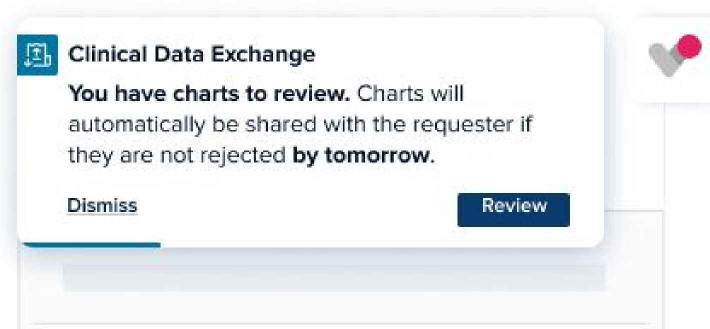
Hello Nicola,

As part of a risk adjustment clinical data exchange request, you have items for your review. Please log in to the Vim Clinical Data Exchange application in your EHR and follow these steps.

If you wish to approve the charts to be shared with the data requester, no action is needed. If you wish to review and reject any of the

2b Notification - In App

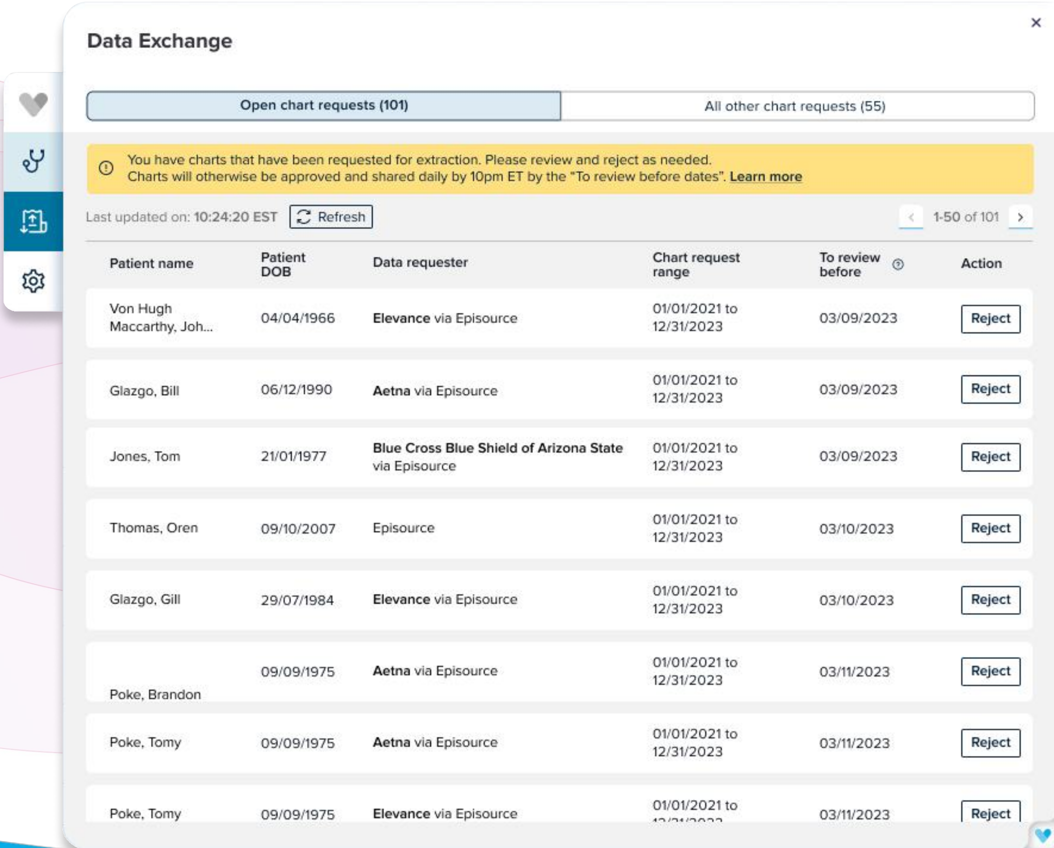
If there are patient charts that are awaiting review, a push notification will appear once per day within the app. There will also be a red notification badge on the Vim icon.



3 Review Chart Request

Access the app and review the **"Open chart requests"** tab. This will show all the chart requests details.

The "Review by" date column is the date you can review chart requests, if you do not reject the request by that date they will be automatically shared with the requester.


Data Exchange

Open chart requests (101) | All other chart requests (55)

You have charts that have been requested for extraction. Please review and reject as needed.
Charts will otherwise be approved and shared daily by 10pm ET by the "To review before dates". Learn more

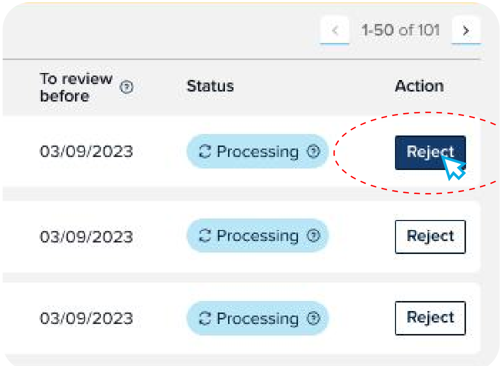
Last updated on: 10:24:20 EST Refresh 1-50 of 101

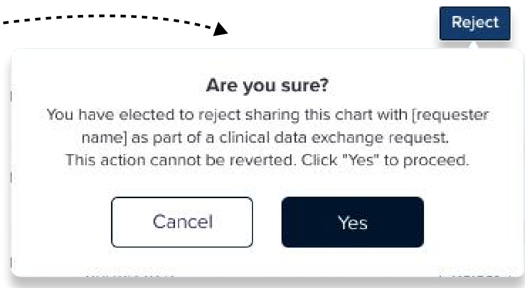
Patient name	Patient DOB	Data requester	Chart request range	To review before	Action
Von Hugh Maccarthy, Joh...	04/04/1966	Elevance via Episource	01/01/2021 to 12/31/2023	03/09/2023	Reject
Glazgo, Bill	06/12/1990	Aetna via Episource	01/01/2021 to 12/31/2023	03/09/2023	Reject
Jones, Tom	21/01/1977	Blue Cross Blue Shield of Arizona State via Episource	01/01/2021 to 12/31/2023	03/09/2023	Reject
Thomas, Oren	09/10/2007	Episource	01/01/2021 to 12/31/2023	03/10/2023	Reject
Glazgo, Gill	29/07/1984	Elevance via Episource	01/01/2021 to 12/31/2023	03/10/2023	Reject
Poke, Brandon	09/09/1975	Aetna via Episource	01/01/2021 to 12/31/2023	03/11/2023	Reject
Poke, Tomy	09/09/1975	Aetna via Episource	01/01/2021 to 12/31/2023	03/11/2023	Reject
Poke, Tomy	09/09/1975	Elevance via Episource	01/01/2021 to	03/11/2023	Reject

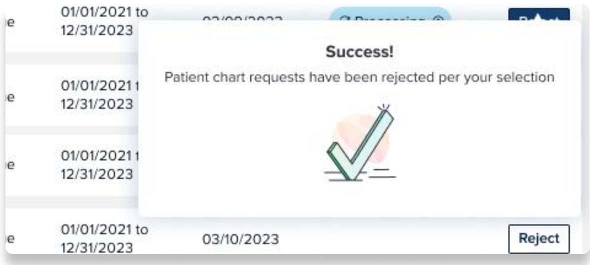
Vim Clinical Data Exchange - Application Walkthrough

4a Address Chart Requests - Reject

Chart requests are often requested from payers and their vendors by CMS to support risk adjustment audits. Designated clinic users can decide to reject specific patient chart requests to be shared with the data requester. This can be done by selecting the “Reject” button and completing the workflow, please note this action cannot be reverted.





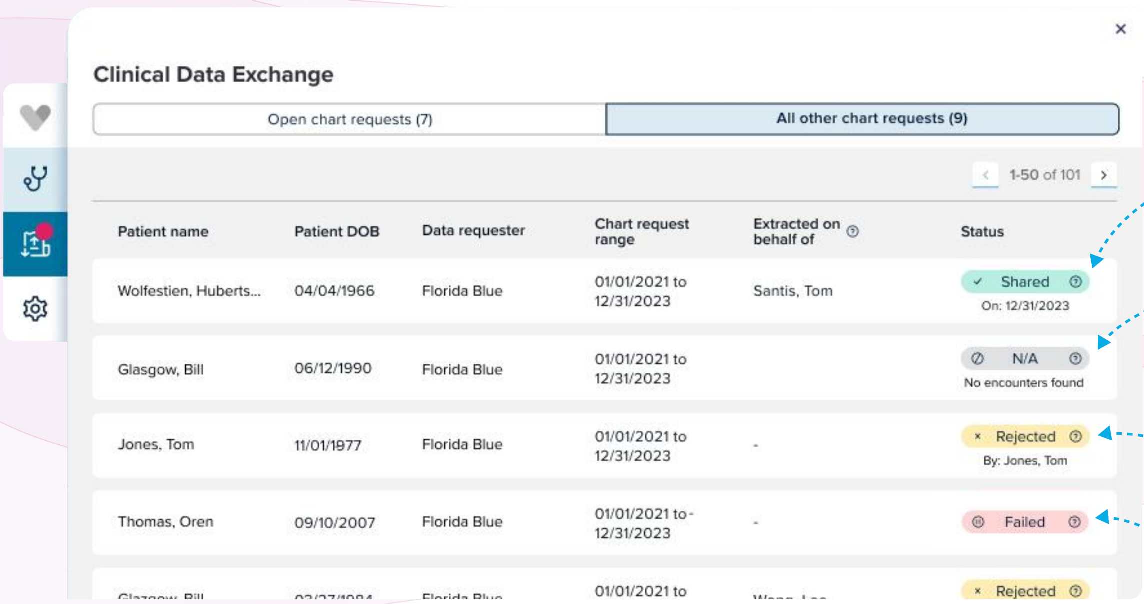


b Approve

Requests will be automatically approved if they are not rejected by 10pm EST, the end of the review date. No action needs to be taken by the user.

5 Chart Request History

This will contain all open chart requests and a short explanation of when a chart request was surfaced, by which requester (vendor, health plan), extracted on behalf of who (EHR user), potentially rejected by who (EHR user) and additional chart-level statuses such as failed, no patient found, no encounters found etc.



b Chart Status

Users can see the current status of each request, details below

Processing: the chart extraction is in process - users can still reject during this stage.

Processing

Shared: The patient chart request was shared with the data requester on a specific date

N/A: Either the patient requested or specific encounters within the date range requested were not found.

Rejected: The patient chart requested was rejected, with the user who rejected it.

Failed: a technical issue prevented the chart extraction.