Public Health Case Reporting

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Introduction to Public Health Case Reporting

Electronic Initial Case Reporting (**eICR**) is the automated, real-time exchange of case reports from your electronic health record (EHR) system to public health agencies. Instead of relying solely on manual reporting, eICR uses structured data and nationally defined trigger criteria to automatically generate and send case reports whenever a patient encounter meets reporting requirements. We utilize direct secure mail to send out Public Health Case Reports and then practices receive the Response Reports via direct mail. We provide a Case Reporting dashboard to track Public Health Case Report statuses from generation to the response report.

The **first step** in getting started with eICR is for your practice or provider organization to **contact your state or local Public Health Agency (PHA)** and notify them of your intent to participate. Each PHA manages its own on-boarding and approval process, and they will tell you exactly what steps you must take to begin. This outreach is required before any automated reporting can be enabled in your system.

The goal of eICR is to:

- Improve timeliness of case reporting to public health.
- Reduce provider burden by automating manual processes.
- Ensure compliance with CMS Promoting Interoperability (MIPS) measures.
- Support public health response by supplying accurate, standardized information.

With eICR, your practice can:

- Automatically generate and send case reports when patient encounters match industry-defined trigger tables.
- Receive Reportability Responses (RRs) back from public health agencies, indicating whether additional reporting or actions are required.
- Track all case reporting activity in a dedicated Case Reporting Dashboard or directly in the patient timeline for easy review.

As you explore the related articles in this section, you'll find guidance on:

- Contacting your PHA and beginning the on-boarding process.
- Using the Case Reporting Dashboard.

- Understanding statuses and responses.
- Meeting regulatory requirements for MIPS.

https://isalus-internal.knowledgeowl.com/help/responding-to-a-client-request-to-begin-ecr

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Getting Started with Electronic Public Health Case Reporting

Getting started begins with reaching out to your Public Health Agency - they should direct you on how to get started!

Public Health Case reporting is the **electronic initial case report (eICR)** is the OfficeEMR feature that supports automatic submission of case reports to your public health agencies, helping your practice meet compliance requirements and improve timeliness of public health data sharing. This process utilizes your practice direct mail address, therefore, if your practice is not already set up for direct mail then you will need to do so - see the article on obtaining a direct mail address. The feature cannot be enabled until approved by the AIMS Platform following coordinated Practice to AIMS to Public Health Agency testing is completed successfully.

Where to Begin

The **AIMS eCR Implementers Guide** identifies the first step in the eCR on-boarding process:

➡ Remember, your practice or provider organization must contact your **state or local Public Health Agency (PHA)** to notify them of your intent to participate.

Each PHA manages its own on-boarding and approval process. This outreach is the first step toward activation of case reporting within your EMR. We recommend keeping a copy of all communications with your PHA in your **MIPS audit file** to support your Case Reporting attestation. You should open an iSalus Support Case to inform us of your intent and then continue to coordinate with our team via that iSalus support case.

Important Note: It is your practice's responsibility to keep timely communication with your Public Health Agency and give our team plenty of lead time on requests as coordinating the steps for testing between iSalus and the AIMS Platform for compliance with your Public Health Agency is both time consuming and complex. We highly recommend making immediate notice to our team on any requests for coordination with your EMR vendor to schedule and perform testing. Failing to make timely notification of requests you receive can delay on-boarding with PHA and impact your MIPS performance - both items that we have no control over.

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eCR Requirements for MIPS 2025

Requirements are subject to change so practice's should rely on CMS to ensure they are following the most up-to-date requirements or sign up with our MIPS Assist program for guided MIPS Assistance.

- **Engagement Window:** CMS requires practices to begin engagement with their PHA within **60 days** of the start of your selected performance period.
- **Reporting Window:** The eCR measure requires participation for at least **180 continuous days** within 2025.
- **Timely Response:** Once the PHA begins working with you, they may request additional information or steps to complete on-boarding. You are required to **respond within 30 days** to remain in good standing for MIPS reporting.
- **Small Practice Exception:** If your practice qualifies as a small practice (15 or fewer clinicians) and you are not submitting Promoting Interoperability data, the eCR/Case Reporting requirement does not apply.

Next Steps After PHA Confirmation

Once your PHA confirms your intent to participate, they will provide instructions for the next steps. These may include testing requirements or specific on-boarding tasks.

- If directed, please **open a support case** with our team.
- Clearly indicate that the case relates to **eCR** and whether the request is **time-sensitive** so we can prioritize appropriately.
- Our team will coordinate with you to complete the requested tasks and support your successful on-boarding.

Important Note

⚠ Do **not** stop your manual case reporting processes until your PHA has explicitly instructed you to do so. Automated electronic reporting should only replace manual workflows once approved by your PHA.

Using the Public Health Case Reporting Dashboard

Prerequisite Checklist of Requirements for Turning on the Case Reporting Feature

To begin using the Dashboard the steps listed below should be completed. If they are not just reach out using your support case to get your next steps for going live:

☐ **1.** The practice has notified their PHA of their intent and received direction on how to proceed

☐ **2.** The practice has SES Direct Messaging for their practice

☐ **3.** The required PHA setup has been performed to allow for testing (support team with assistance from product team)

☐ **4.** The client's PHA and AIMS testing was performed in conjunction with iSalus (requires completion of AIMS coordinated test scenarios)

✔ **5.** AIMS has provided the Testing status as Pass and Approval for Go Live is obtained

☐ **6.** Support has coordinated the practice Go Live to ensure users have access and we answer any questions

> With all of the items listed above completed, your practice is now live on the Automated Case Reporting Module and should develop practice workflows to transition your manual case reporting process into one that uses this automated reporting process to monitor activity between your EMR and your PHA.

Using the Case Reporting Dashboard

With AIMS approval to Go-Live for your practice, your team should be aware of your Go Live date where automated case reporting begins. You will then use the Case Reporting Dashboard to track Case Reports submitted automatically and to view Response Reports that your PHA sends back to you in response.

Enable Case Reporting for practice users

- Case reporting access should be automatically available to users with EMR access and patient timeline access - you will be able to see outbound and inbound activity as a Health Exchange timeline item.
- Users with access to reports can be given access to the Case Reporting Dashboard report

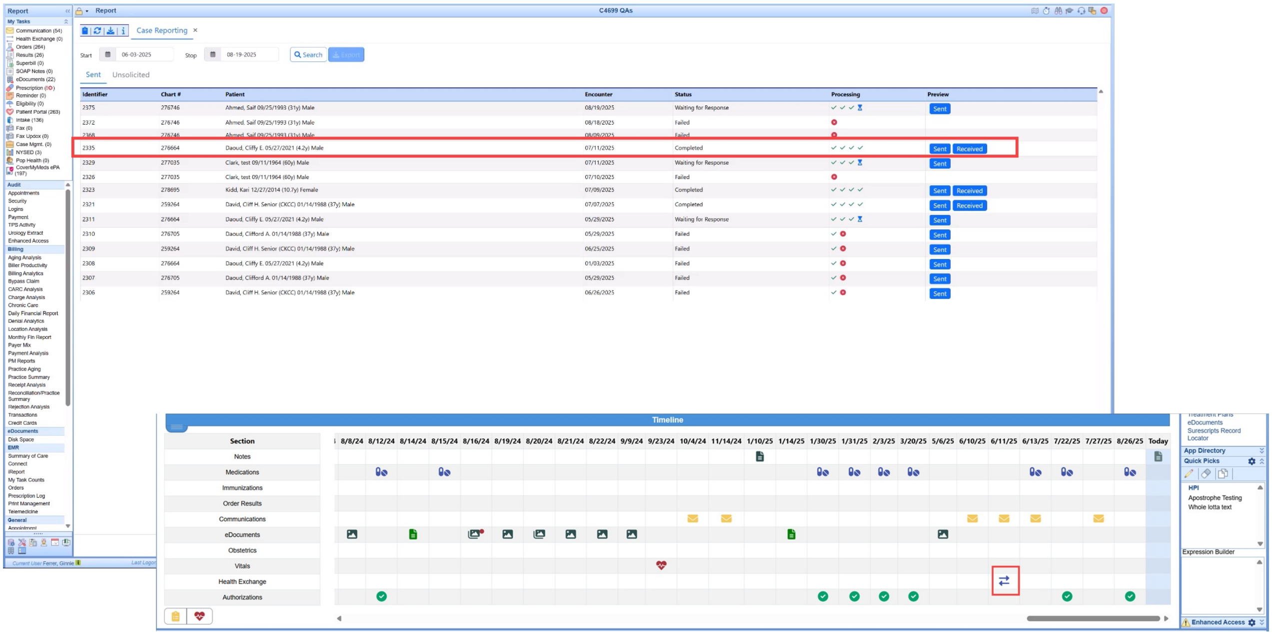
Access the Case Reporting Practice Level Data and Functionality

- Navigate to **Report → Case Reporting** in your EMR to see the practice level view of Public Health Case Reports sent out and the associated inbound Response Reports
- Enter a date range and click **Search** to see activity for that period
- The Export button exports the filtered eICR records into an Excel document for use as a PHA Submission Report or to produce data that can be used for building a practice level PHA Case Submission Report
- **Dashboard Features:**
    - **Sent Queue**: Shows automated outbound reports.
    - **Unsolicited Queue**: Shows inbound reports that need manual review.
    - **Check Status & Preview Files**
        - Statuses include *Waiting for Response*, *Completed*, *Failed*.
        - Use the **Sent** and **Received** buttons to view the outbound eICR and inbound RR files.

View Case Reports at the EMR Chart Level for a Specific Patient

- In the EMR from the **Patient Timeline** view you can see outbound eICR CCDA sends and the associated Response Reports (RRs) that are sent back from your PHA via AIMS:
    - The eICRs and the RRs display on the patient's chart timeline under **Health Exchange**.

- Click the arrow icon to open the report details directly from the chart.



eICR Process and Process Diagram

When engaging with our **electronic case reporting (eICR)** module for **Public Health Agency (PHA)** reporting, the process uses an automated trigger code table built into OfficeEMR to determine when to build and automatically send an eICR. OfficeEMR is currently using AIMS Version: eICR Data Quality Schematron 2.0. The sending of the eICR uses the practice's direct mail and sends out to the **AIMS Platform** who acts as a clearinghouse of sorts that validates the file sent, forwards on to the appropriate PHA, and returns a **Reporting Response (RR)** to the practice. The process steps are as follows:

User Saves Signed Note OR Saves Lab Results

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Evaluate Against Case Reporting Trigger Table

No Match
END

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MATCH → Continue

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Stage eICR CCDA Table for Sending
OfficeEMR - Backend Process

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Scheduled Job Detects Staged eICRs for Transmission
OfficeEMR - Backend Process

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Automated Send of eICR to AIMS via Practice's SES Direct Secure Messaging
OfficeEMR - Backend Process

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AIMS Receives and Validates eICR Document
AIMS Process

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AIMS Routes eICR to RCKMS for Reportability Evaluation
AIMS/RCKMS Process

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AIMS Generates RR and routes messages -except errors- to PHA
AIMS Process

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AIMS Sends RR Back to Practice via Direct Messaging

AIMS - Transmission to Practice

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Inbound Message Handler Receives RR

OfficeEMR - Backend Process

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OfficeEMR will Parse RR and Extract Key Determination Data for reporting dashboard

OfficeEMR - Backend Process

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Match RR to Original eICR (if possible) for patient association and reporting dashboard

OfficeEMR - Backend Process

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Store RR Document for practice use

OfficeEMR - Backend Process

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Route Communication and Attach RR to Patient Timeline under Health Exchange

OfficeEMR - Visible in UI

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Handle RR Errors and Warnings (Auto-Generate Support Message for Salesforce Case Creation)

OfficeEMR - Backend Support Alert

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Display RR in New Case Reporting Dashboard in Report Portal

OfficeEMR - Visible in UI