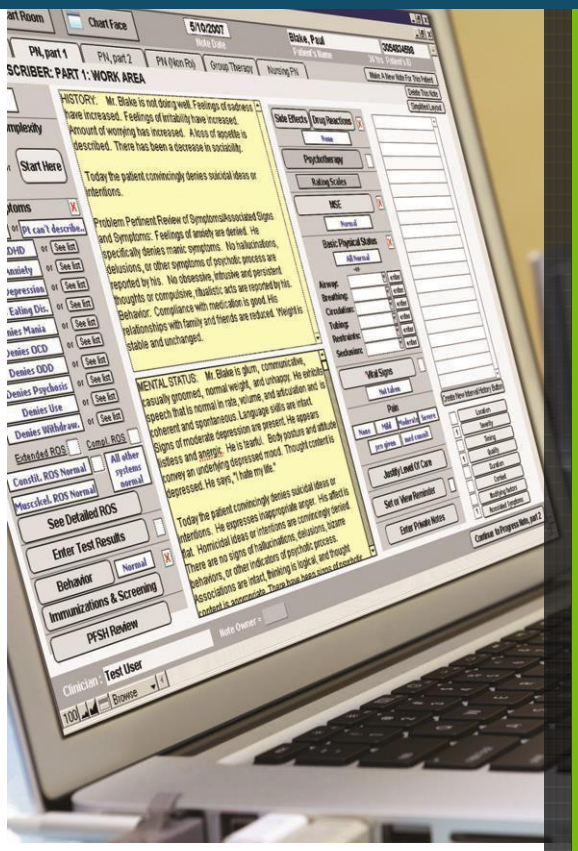
ICANotes
Behavioral Health EHR

2025

Real World Test Plan Results



ICANotes LLC

01/14/2026

GENERAL INFORMATION

Plan Report ID Number: **RWT Plan ICANotes - 10-31-2023**

Developer Name: **ICANotes, LLC**

Product Name(s): **ICANotes EHR/EMR for Behavioral Health**

Version Number(s): **11.6, Edition 2015, Certification Date: 12/31/2018**

Certified Health IT: **15.04.04.2755.ICAN.11.01.1.221224**

Product List (CHPL) ID: **15.04.04.2755.ICAN.11.01.1.221224**
Withdrawn Product: 15.04.04.1637.ICAN.11.00.1.181231

Real World Testing Plan URL:
https://www.icanotes.com/features/onc-atcb-certification/

Real World Testing Results URL:
https://www.icanotes.com/wp-content/uploads/2024/01/2023-RWTP-Results-Report.pdf

JUSTIFICATION FOR REAL WORLD TESTING APPROACH

ICANotes is a medium-sized electronic health record system founded in 1999 and designed by a psychiatrist to serve behavioral health providers exclusively. ICANotes supports psychiatry, psychology, therapy, and addiction treatment providers. The product is currently certified to the 2015 Health Information Technology Edition and is delivered as a cloud-based solution. The majority of ICANotes customers provide outpatient behavioral health services and routinely receive referrals from external clinicians.

ICANotes utilizes a single Real World Testing plan to address multiple applicable certification criteria.

Real World Testing is conducted using real-time workflows in a live production environment with de-identified test patient data. This approach reflects actual clinical use and interoperability conditions while ensuring compliance with HIPAA privacy requirements.

Testing methodologies are adjusted as needed to accommodate unforeseen issues encountered during real-world use. Any changes to the testing approach are documented in the Results Report, including the reason for the change and confirmation that the intended outcomes are met.

Testing sessions are conducted via Google Meets in the production environment. Demographic information is de-identified to protect patient privacy. External agencies are selected to send and receive transitions of care as part of interoperability testing. Each testing session includes a clinician or practice staff member, an ICANotes representative supporting the session, and an ICANotes observer who documents the results. Development and quality assurance staff remain available during testing for support if necessary.

ICANotes conducts Real World Testing throughout the 2025 calendar year and submits the associated Results Report by February 1, 2026. Although some clinicians are unable to complete certain Direct-based measures due to external credential limitations, each certification criterion is successfully tested by at least one clinician per quarter, satisfying Real World Testing requirements.

MEASURES USED IN THE OVERALL APPROACH

ASSOCIATED CERTIFICATION CRITERIA

List certification criteria associated with the measure and if updated to the 2015 Edition Cures Update criteria.

Measurement/Metric	Associated Certification Criteria
Measure 1	§ 170.315(b)(1) Transitions of Care (Receive)
Measure 2	§ 170.315(b)(2) Clinical Information Reconciliation and Incorporation
Measure 3	§ 170.315(c)(1) Clinical Quality Measures Record and Export
Measure 4	§ 170.315(b)(1) Transitions of Care (Send)
Measure 5	§ 170.315(e)(1) View, Download and Transmit to 3rd party
Measures 6 - 8	§ 170.315(b)(6) Data Export
Measure 9	§ 170.315(g)(7) Application Access – Patient Selection
Measure 10	§170.315(b)(10) Electronic Health Information export
Measure 11	§ 170.315(g)(9) Application Access – All Data Request

Measurement/Metric	Description
Measure 1: Clinician logs into ICANotes and receives a CCDA from a external individual via Direct Protocol with no Tech Support and no errors. CCDA has demographic information adjusted so PHI is not visible. Successful receipt of CCDA is achieved and observed. The amount of time should be no more than 60 seconds.	Clinician begins a new patient encounter in ICANotes certified software with a patient referred by an external individual. With a Direct Address and unique Kno2 credentials, the clinician is able to have a seamless login and secure receipt of CCDA from the external individual using Direct Protocol (Surescripts is the underlying software that allows use of Direct Messaging). Common Clinical Data Set (CCDS) standard will be demonstrated in these transactions. Noted will be the successful receipt of the CCDA with all fields completed. The amount of time for completion should be no more than 10 minutes. Denominator Context will include a minimum of two CCDA receipts over a quarterly period. This will meet § 170.315(b)(1) (Receive).
Measure 2: The CCDA is validated, and Clinical Information Reconciliation is performed. No errors are expected. The amount of time should be no more than 180 seconds.	After successful receipt of the CCDA, the clinician validates the CCDA within ICANotes with no errors in a maximum of ten minutes. Clinical information reconciliation for medication, medication allergy, and current problem list is performed using ICANotes software. CCDS standard will be demonstrated in these transactions. Log files demonstrate the reconciliation. Reconciliation attempts are quantified across interactions, demonstrating consistent performance. This will meet § 170.315(b)(2).
Measure 3: Documentation of Medications (CQM #68) is done without assistance. The amount of time taken to document should be no more than 60 seconds. No errors are expected.	User completes and documents medications within ICANotes with no technical assistance in a maximum of 180 **seconds**. (CQM #68) within appropriate location in ICANotes software to meet 170.315(c)(1) by completing the appropriate fields in ICANotes software. Success rate of documenting medications with and without errors, monitored across a minimum of 2 documentation instances per quarter. The following day it will be reflected in the numerator and denominator of this MIPS CQM measure. Ninety five percent success rate will be reflected in the numerator over denominator.
Measure 4: Updated CCDA is sent back to external individual. Successful sending of CCDA is achieved and observed. The amount of time to send the document should be no more than 60 seconds.	The user sends an updated CCDA via Direct Protocol and posts it to the patient portal in less than 5 minutes, with confirmed success. Updated CCDA is also sent to the patient portal. Document successful sends out of total attempts, providing ongoing interoperability evidence. Confirmation of sent CCDA is noted along with log files. Two out of three attempts will be successful, ensuring the measure reflects consistent performance over time. This will meet § 170.315(b)(1) (Send).
Measure 5: Access via patient portal - Observation of the View, Download & Transmit functions is performed. This will demonstrate the portal as a key tool for the clinician to share the patient's most current health information with the patient. The amount of time should be no more than 3 minutes total for 3 tasks and there should be no errors.	Real-time patient data will be adjusted to protect PHI before Measure 5 is completed. User is allowed access to patient portal to view patient CCDA and download the CCDA without assistance. The user accesses the portal to perform View, Download, and Transmit tasks in under 5 minutes. Transmission of patient data will be sent to another individual. Measure a minimum of two View, Download and Transmit functions across three months, giving insights into patient portal reliability and engagement. This will meet § 170.315(e)(1).

Measure 6: The user successfully exports data file on demand.	Authorized user will perform an export of CCDA data from the production server in real-time (on demand) with a specific start and end date immediately. This will be done without delay within 10 minutes and sent to a specific file location. This will be accomplished efficiently and with no error and the file will be inspected when received to ensure it is the file requested. Minimum of two times per quarter with a 9/10 denominator. This measure allows the capture of report data selected by and on demand without assistance from development staff. The ability to independently create reports is vital to office practices and integral to a certified EHR. ICANotes staff will verify the reports have been created successfully with requested data through verbal acknowledgements and visual observation.
Measure 7: Practice staff member successfully exports a file at a delayed time – with a specific start and end date.	Authorized user will perform an export of CCDA data in the future time— from the production server with a scheduled specific start and end date – such as November 1 - November 2, 2021. This will be accomplished efficiently and with no error and the file will be inspected when received to ensure it is the file requested. This measure allows the user to select a time in the future without assistance from development staff. The ability to independently create reports is vital to office practices and integral to a certified EHR. ICANotes staff will verify the reports have been created successfully and sent to a specific file location with requested data through verbal acknowledgements and visual observation. There will be a minimum of 2 times per quarter with a denominator of 9/10.
Measure 8: User sets an export for a delayed time during hours after the practice is closed and is able to run successfully.	User sets a data export to run after hours, verifying the system's ability to operate independently. This measure allows the capture of report data selected by and on demand without assistance from development staff. The ability to independently create reports is vital to office practices and integral to a certified EHR. A minimum of two after-hours scheduled exports quarterly will be completed with a 9/10 success rate, establishing a baseline for this feature's reliability. ICANotes staff will verify the reports have been created successfully with requested data and sent to specific location with screenshots that capture the activity.
Measure 9: Provide user with API documentation.	User uses a third-party application to communicate with ICANotes. The user acts as an authorized person (patient) and obtains a userKey and userSecret. A Patient ID is created which assures the privacy and security of the patient. A minimum of two sessions are reviewed for seamless third-party data access, demonstrating interoperability. This will meet § 170.315(g)(7).

Measure 10: Authorized users can export EHI for a single patient or a patient population without errors and without developer support. The file must be machine-readable, meeting the requirements of § 170.315(b)(10).	The user must be able to generate an export of all Electronic Health Information (EHI) stored by the certified product at the time of certification. This export should include a single patient's data, and the export format must be electronic and in a computable format. The system must support the export without requiring developer assistance. The export must be completed in real-time, and a publicly accessible hyperlink to the export format documentation must accompany the file. Count successful exports from single patients and populations without errors. There will be a minimum of 2 population exports over three months, verifying consistent performance. This will meet § 170.315(b)(10).
Measure 11: User demonstrates the ability, through the use of the token, to receive the entirety of a patient CCDA for a specific time and date with all data categories.	The user demonstrates secure retrieval of full patient CCDA data for a specified date/time. The return of the data is confirmed to be the patient selected earlier and data is returned successfully and without delay**. A minimum of two secure data retrievals** quarterly will be completed to confirm reliability across time. Document successful retrievals without errors. This will meet § 170.315(g)(9).

REPORT AND RESULTS - Q1: March 2025

Expected outcomes for the **11 events** will include the following data points:

- Total number of events tested: **11**
- Number of passed (i.e. successful) events: **11**
- Number of passed and partial completions: **0**
- Number of not tested / incomplete events: **0**

As detailed in this plan under the "Schedule of Key Milestones" section, each measure/metric will be tested at least once per quarter with our clinician RWT groups to ensure the expected outcomes are reliably attained.

Measurement/Metric	Report	Result
§ 170.315(b)(1) Transitions of Care (Receive)	A CCDA was sent via Direct Protocol to the Clinicians with a Direct Address and unique Kno2 credentials by an external individual. The Clinician successfully received the transition of care from the external individual, they carried out the necessary steps and the CCDA was visible in the patient's chart with no conflict or breach of PHI within the stipulated 60-second time frame.	Tested – Pass
§ 170.315(b)(2) Clinical Information Reconciliation and Incorporation	After successful receipt of the CCDA, the Clinician validated the CCDA within ICANotes and the clinical information reconciliation for medication, medication allergy, and current problem list was performed.	Tested – Pass
170.315(c)(1) Clinical Quality Measures Record and Export	CQM was tested and verified within an appropriate location in ICANotes software, within the stipulated 60 seconds. The following day, CQM report was generated for Documentation of Current Medication and the report showed the patient under the Denominator and the Numerator to indicate we passed this measure.	Tested- Pass
§ 170.315(b)(1) Transitions of Care (Send)	The Clinician successfully sent the updated CCDA within the 60-second time frame back to the external individual via Direct Protocol and to the patient portal. The reconciled CCDA was also sent to the Patient Portal.	Tested – Pass
§ 170.315(e)(1) View, Download and Transmit to 3rd party	The Clinicians accessed the patient portal using de-identified test patient data and successfully Viewed, Downloaded and Transmitted the reconciled CCDA under the stipulated 3-minute time.	Tested - Pass

Measurement/Metric	Report	Result
§ 170.315(b)(6) Data Export	The Clinicians accessed the ICANotes Upload Site and successfully did 3 different types of data exports. Measure 6 – Data Export (Immediate) Measure 7 – Data Export (Scheduled with specific date and time) Measure 8 – Data Export (Scheduled after work hours) The exported information was recorded and stored.	Tested - Pass
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person (patient) successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.	Tested – Pass
§170.315(b)(10) Electronic Health Information export	The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI) and also was able to successfully export the EHI for a population of patients. The user was able to perform this step successfully without any developer's assistance.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session in which all measures were attempted to be tested.

Overall, we received an averaged "Pass" status for 11 of the 11 measures that were tested by two different testers (**MB** and **MO**) involved which synthesized the individual assessments into a unified result.

For one (1) tester (**GP**) we only tested 8 measures successfully and couldn't test 3 measures linked to Kno2.

Synopsis of the Measures that were successfully Tested in Q1.

REAL WORLD TESTING - RESULTS (March 2025)											
Measures / Rating / Clinician	Measure 1 - Transitions of Care (Receive)	Measure 2 - Clinical Information Reconciliation and Incorporation	Measure 3 - Clinical Quality Measures Record and Export	Measure 4 - Transitions of Care (Send)	Measure 5 - View, Download and Transmit to 3rd party	Measure 6 - Data Export (Immediate)	Measure 7 - Data Export (Scheduled w/ specific date & time)	Measure 8 - Data Export (Scheduled after work hours)	Measure 9 - Successfully registered for MyLink	Measure 10 - Electronic Health Information export	Measure 11 - Viewed entire CCDA in MyLink
MO- 03/24/2025	Tested Pass- 56 Secs	Tested Pass- 175 Secs	Tested Pass- 57 Secs	Tested Pass- 52 Secs	Tested Pass- 166 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
MB- 03/26/2025	Tested Pass- 53 Secs	Tested Pass- 170 Secs	Tested Pass- 54 Secs	Tested Pass- 55 Secs	Tested Pass- 172 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
GP- 03/31/2025	Not Tested	Not Tested	Tested Pass- 56 Secs	Not Tested	Tested Pass- 168 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass

For Quarter 1, 3 Clinicians participated in the Real-world Testing. As listed above the testers were **MO, MB and GP**. The brief explanation is mentioned as below:

Not Tested: Measure 1, 2 and 4 – Kno2 credential error:

For the Clinician (**GP**) we were unable to test Measures 1, 2, and 4 due to the lack of access to their Kno2 account. This prevented the clinician from interacting with the platform, directly impacting the ability to test these measures.

Measure1, 2 and 4: Transition of Care (Receive), Medication Reconciliation and Transition of Care (Send)

- The 2 testers (**MO** and **MB**) were able to successfully receive the C-CDA from an external source sent via Direct Protocol.
- The clinicians were able to login to their Kno2 Direct Email account using their unique User ID and Password and retrieved the C-CDA.
- The C-CDA was successfully validated in the ICANotes EHR. After validating the C-CDA, the medication, allergies and diagnosis was successfully reconciled into the note.
- The clinicians signed the note, and they were able to send the updated C-CDA (Transition of care) to an external individual via Direct protocol and also to the patient portal
- The entire steps were completed in the time frame as mentioned above.
- These limitations were attributable to external Direct credential provisioning and not to ICANotes system functionality, which was successfully demonstrated by other participants.

Measure 3: Clinical Quality Measures Record and Export

- After reconciling the medications, allergies and diagnosis, all the testers were able to attach a service code For Example: **99203** and easily select the checkbox to indicate the Current Medications were Documented successfully in the note.
- The testers were able to complete the entire steps easily in the time frame mentioned above.

Measure 5: View, Download and Transmit to 3rd Party

- The testers were able to successfully login to Patient Portal using the de-identified test patient data and were able to view, download and transmit the reconciled C-CDA in the timeframe as mentioned above.

Measure 6 to 8: Data Export

- The clinicians accessed the ICANotes upload site and were able to successfully complete the 3 different types of data exports.
    - Measure 6 – Data Export (Immediate)
    - Measure 7 – Data Export (Scheduled with specific date and time)
    - Measure 8 – Data Export (Scheduled after work hours)

Measure 9: Application Access – Patient Selection

- The tester successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.

Measure 10: Electronic health Information export

- The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI)
- This user was also able to export Electronic Health Information (EHI) for a patient population.
- The user was able to successfully perform the Electronic health Information (EHI) export without a developer's assistance.

Measure 11: **Application Access – All Data Request**

- After receiving the registration email, the tester was able to successfully register the de-identified test patient datafor the first time and authorized the data access to the 3rd party application
- The tester was able to complete the registration in the MyLinks application and gathered the records successfully
- After gathering the record, the tester was able to generate the authorized user's completed C-CDA in a human readable format

REPORT AND RESULTS – Q2: June 2025

Expected outcomes for the **11 events** will include the following data points:

- Total number of events tested: **11**
- Number of passed (i.e. successful) events: **11**
- Number of passed and partial completions: **0**
- Number of not tested / incomplete events: **0**

As detailed in this plan under the "Schedule of Key Milestones" section, each measure/metric will be tested at least once per quarter with our clinician RWT groups to ensure the expected outcomes are reliably attained.

Measurement/Metric	Report	Result
§ 170.315(b)(1) Transitions of Care (Receive)	A CCDA was sent via Direct Protocol to the Clinicians with a Direct Address and unique Kno2 credentials by an external individual. The Clinician successfully received the transition of care from the external individual, they carried out the necessary steps and the CCDA was visible in the patient's chart with no conflict or breach of PHI within the stipulated 60-second time frame.	Tested – Pass
§ 170.315(b)(2) Clinical Information Reconciliation and Incorporation	After successful receipt of the CCDA, the Clinician validated the CCDA within ICANotes and the clinical information reconciliation for medication, medication allergy, and current problem list was performed.	Tested – Pass
170.315(c)(1) Clinical Quality Measures Record and Export	CQM was tested and verified within an appropriate location in ICANotes software, within the stipulated 60 seconds. The following day, CQM report was generated for Documentation of Current Medication and the report showed the patient under the Denominator and the Numerator to indicate we passed this measure.	Tested – Pass
§ 170.315(b)(1) Transitions of Care (Send)	The Clinician successfully sent the updated CCDA within the 60-second time frame back to the external individual via Direct Protocol and to the patient portal. The reconciled CCDA was also sent to the Patient Portal.	Tested – Pass
§ 170.315(e)(1) View, Download and Transmit to 3rd party	The Clinicians accessed the patient portal using fake PHI and successfully Viewed, Downloaded and Transmitted the reconciled CCDA under the stipulated 3-minute time.	Tested – Pass

Measurement/Metric	Report	Result
§ 170.315(b)(6) Data Export	The Clinicians accessed the ICANotes Upload Site and successfully did 3 different types of data exports. Measure 6 – Data Export (Immediate) Measure 7 – Data Export (Scheduled with specific date and time) Measure 8 – Data Export (Scheduled after work hours) The exported information was recorded and stored.	Tested – Pass
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person (patient) successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.	Tested – Pass
§170.315(b)(10) Electronic Health Information export	The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI) and also was able to successfully export the EHI for a population of patients. The user was able to perform this step successfully without any developer's assistance.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session in which all measures were attempted to be tested.

Overall, we received an averaged "Pass" status for 11 of the 11 measures that were tested by two different testers (**MB** and **MO**) involved which synthesized the individual assessments into a unified result.

For one (1) tester (**GP**) we only tested 8 measures successfully and couldn't test 3 measures linked to Kno2.

Synopsis of the Measures that were successfully Tested in Q2.

REAL WORLD TESTING - RESULTS (June 2025)											
Measures / Rating / Clinician	Measure 1 - Transitions of Care (Receive)	Measure 2 - Clinical Information Reconciliation and Incorporation	Measure 3 - Clinical Quality Measures Record and Export	Measure 4 - Transitions of Care (Send)	Measure 5 - View, Download and Transmit to 3rd party	Measure 6 - Data Export (Immediate)	Measure 7 - Data Export (Scheduled w/ specific date & time)	Measure 8 - Data Export (Scheduled after work hours)	Measure 9 - Successfully registered for MyLink	Measure 10 - Electronic Health Information export	Measure 11 - Viewed entire CCDA in MyLink
MB- 06/17/2025	Tested Pass- 58 Secs	Tested Pass- 176 Secs	Tested Pass- 54 Secs	Tested Pass- 57 Secs	Tested Pass- 174 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
MO - 06/20/2025	Tested Pass- 56 secs	Tested Pass- 178 Secs	Tested Pass- 52 Secs	Tested Pass- 55 Secs	Tested Pass- 160 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
GP- 06/26/2025	Not Tested	Not Tested	Tested Pass- 51 Secs	Not Tested	Tested Pass- 167 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass

For Quarter 2, 3 Clinicians participated in the Real-world Testing. As listed above the testers were **MB, MO** and **GP**. The brief explanation is mentioned as below:

Not Tested: Measure 1, 2 and 4 – Kno2 credential error:

For the Clinician (**GP**) we were unable to test Measures 1, 2, and 4 due to the lack of access to their Kno2 account. This prevented the clinician from interacting with the platform, directly impacting the ability to test these measures.

Measure1, 2 and 4: Transition of Care (Receive), Medication Reconciliation and Transition of Care (Send)

- The 2 testers (**MB** and **MO**) were able to successfully receive the C-CDA from an external source sent via Direct Protocol.
- The clinicians were able to login to their Kno2 Direct Email account using their unique User ID and Password and retrieved the C-CDA.
- The C-CDA was successfully validated in the ICANotes EHR. After validating the C-CDA, the medication, allergies and diagnosis was successfully reconciled into the note.
- The clinicians signed the note, and they were able to send the updated C-CDA (Transition of care) to an external individual via Direct protocol and also to the patient portal
- The entire steps were completed in the time frame as mentioned above.
- These limitations were attributable to external Direct credential provisioning and not to ICANotes system functionality, which was successfully demonstrated by other participants.

Measure 3: Clinical Quality Measures Record and Export

- After reconciling the medications, allergies and diagnosis, all the testers were able to attach a service code For Example: **99203** and easily select the checkbox to indicate the Current Medications were Documented successfully in the note.
- The testers were able to complete the entire steps easily in the time frame mentioned above.

Measure 5: View, Download and Transmit to 3rd Party

- The testers were able to successfully login to Patient Portal using the fake PHI and were able to view, download and transmit the reconciled C-CDA in the timeframe as mentioned above.

Measure 6 to 8: Data Export

- The clinicians accessed the ICANotes upload site and were able to successfully complete the 3 different types of data exports.
    - Measure 6 – Data Export (Immediate)
    - Measure 7 – Data Export (Scheduled with specific date and time)
    - Measure 8 – Data Export (Scheduled after work hours)

Measure 9: Application Access – Patient Selection

- The tester successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.

Measure 10: Electronic health Information export

- The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI)
- This user was also able to export Electronic Health Information (EHI) for a patient population.
- The user was able to successfully perform the Electronic health Information (EHI) export without a developer's assistance.

Measure 11: **Application Access – All Data Request**

- After receiving the registration email, the tester was able to successfully register the fake PHI for the first time and authorized the data access to the 3rd party application
- The tester was able to complete the registration in the MyLinks application and gathered the records successfully
- After gathering the record, the tester was able to generate the authorized user's completed C-CDA in a human readable format

REPORT AND RESULTS – Q3: September 2025

Expected outcomes for the **11 events** will include the following data points:

- Total number of events tested: **11**
- Number of passed (i.e. successful) events: **11**
- Number of passed and partial completions: **0**
- Number of not tested / incomplete events: **3**

As detailed in this plan under the "Schedule of Key Milestones" section, each measure/metric will be tested at least once per quarter with our clinician RWT groups to ensure the expected outcomes are reliably attained.

Measurement/Metric	Report	Result
§ 170.315(b)(1) Transitions of Care (Receive) – 60 seconds.	A CCDA was sent via Direct Protocol to the Clinicians with a Direct Address and unique Kno2 credentials by an external individual. The Clinician successfully received the transition of care from the external individual, they carried out the necessary steps and the CCDA was visible in the patient's chart with no conflict or breach of PHI within the stipulated 60-second time frame.	Tested – Pass
§ 170.315(b)(2) Clinical Information Reconciliation and Incorporation – 180 seconds	After successful receipt of the CCDA, the Clinician validated it within ICANotes. They successfully reconciled the medication, medication allergy, and current problem list using the ICANotes software within the stipulated time of 180 seconds.	Tested – Pass
170.315(c)(1) Clinical Quality Measures Record and Export – 60 seconds	CQM was tested and verified within an appropriate location in ICANotes software, within the stipulated 60 seconds. The following day, CQM report was generated for Documentation of Current Medication and the report showed the patient under the Denominator and the Numerator to indicate we passed this measure.	Tested – Pass
§ 170.315(b)(1) Transitions of Care (Send) – 60 seconds	The Clinician sent the updated CCDA with minimal delay back to the external individual via Direct Protocol within the stipulated 60 seconds. The reconciled CCDA was also sent to the Patient	Tested – Pass
§ 170.315(e)(1) View, Download and Transmit to 3rd party – 3 minutes	The Clinicians accessed the patient portal using fake PHI and successfully Viewed, Downloaded and Transmitted the reconciled CCDA under the stipulated 3-minute time.	Tested – Pass

Measurement/Metric	Report	Result
§ 170.315(b)(6) Data Export	The Clinicians accessed the ICANotes Upload Site and successfully did 3 different types of data exports. Measure 6 – Data Export (Immediate) Measure 7 – Data Export (Scheduled with specific date and time) Measure 8 – Data Export (Scheduled after work hours) The exported information was recorded and stored.	Tested – Pass
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person (patient) successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.	Tested – Pass
§170.315(b)(10) Electronic Health Information export	The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI) and also was able to successfully export the EHI for a population of patients. The user was able to perform this step successfully without any developer's assistance.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session in which all measures were attempted to be tested.

Overall, an averaged "Pass" status was achieved for all 11 measures tested by 1 Clinician (**MO**)

2 Clinicians (**MB and GP**) tested 8 measures successfully and couldn't test 3 measures linked to Kno2.

Synopsis of the Measures that were successfully tested in Q3

REAL WORLD TESTING - RESULTS (September 2025)												
Measures / Rating / Clinician	Measure 1 - Transitions of Care (Receive)	Measure 2 - Clinical Information Reconciliation and Incorporation	Measure 3 - Clinical Quality Measures Record and Export	Measure 4 - Transitions of Care (Send)	Measure 5 - View, Download and Transmit to 3rd party	Measure 6 - Data Export (Immediate)	Measure 7 - Data Export (Scheduled w/ specific date & time)	Measure 8 - Data Export (Scheduled after	Measure 9 - Successfully registered for	Measure 10 - Electronic Health Information export	Measure 11 - Viewed entire CCDA in MyLink
MO- 09/02/2025	Tested Pass- 58 secs	Tested Pass- 171 Secs	Tested Pass- 56 Secs	Tested Pass- 55 Secs	Tested Pass- 165 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
MB- 09/10/2025	Not Tested	Not Tested	Tested Pass- 52 Secs	Not Tested	Tested Pass- 170 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
GP- 09/23/2025	Not Tested	Not Tested	Tested Pass- 53 Secs	Not Tested	Tested Pass- 168 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass

For Quarter 3, 2 Clinicians participated in the Real-World Testing. As listed above the testers were **MO, MB** and **GP**. The brief explanation is mentioned as below:

Not Tested: Measure 1, 2 and 4 – Kno2 credential error:

The Clinicians (**GP** and **MB**) were unable to test Measures 1, 2, and 4 due to the lack of access to their Kno2 account. This prevented the clinician from interacting with the platform, directly impacting the ability to test these measures.

Measure1, 2 and 4: Transition of Care (Receive), Medication Reconciliation and Transition of Care (Send)

- The 1 tester (**MO**) was able to successfully receive the C-CDA from an external source sent via Direct Protocol.
- The clinician was able to login to their Kno2 Direct Email account using their unique User ID and Password and retrieved the C-CDA.
- The C-CDA was successfully validated in the ICANotes EHR. After validating the C-CDA, the medication, allergies and diagnosis was successfully reconciled into the note.
- The clinician signed the note, and was able to send the updated C-CDA (Transition of care) to an external individual via Direct protocol and also to the patient portal
- The entire steps were completed in the time frame as mentioned above.
- These limitations were attributable to external Direct credential provisioning and not to ICANotes system functionality, which was successfully demonstrated by other participants.

Measure 3: Clinical Quality Measures Record and Export

- After reconciling the medications, allergies and diagnosis, all the testers were able to attach a service code For Example: **99203** and easily select the checkbox to indicate the Current Medications were Documented successfully in the note.
- The testers were able to complete the entire steps easily in the time frame mentioned above.

Measure 5: View, Download and Transmit to 3rd Party

- The testers were able to successfully login to Patient Portal using the de-identified test patient data and were able to view, download and transmit the reconciled C-CDA in the timeframe as mentioned above.

Measure 6 to 8: Data Export

- The clinicians accessed the ICANotes upload site and were able to successfully complete the 3 different types of data exports.
    - Measure 6 – Data Export (Immediate)
    - Measure 7 – Data Export (Scheduled with specific date and time)
    - Measure 8 – Data Export (Scheduled after work hours)

Measure 9: Application Access – Patient Selection

- The tester successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.

Measure 10: Electronic health Information export

- The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI)
- This user was also able to export Electronic Health Information (EHI) for a patient population.
- The user was able to successfully perform the Electronic health Information (EHI) export without a developer's assistance.

Measure 11: **Application Access – All Data Request**

- After receiving the registration email, the tester was able to successfully register the fake PHI for the first time and authorized the data access to the 3rd party application
- The tester was able to complete the registration in the MyLinks application and gathered the records successfully
- After gathering the record, the tester was able to generate the authorized user's completed C-CDA in a human readable format

REPORT AND RESULTS – Q4: December 2025

Expected outcomes for the **11 events** will include the following data points:

- Total number of events tested: **11**
- Number of passed (i.e. successful) events: **11**
- Number of passed and partial completions: **0**
- Number of not tested / incomplete events: **3**

As detailed in this plan under the "Schedule of Key Milestones" section, each measure/metric will be tested at least once per quarter with our clinician RWT groups to ensure the expected outcomes are reliably attained.

Measurement/Metric	Report	Result
§ 170.315(b)(1) Transitions of Care (Receive) – 60 seconds.	PHI was de-sensitized by the Clinicians and the replication of the de-sensitized information was done by an external individual. A CCDA was sent via Direct Protocol to the Clinicians with a Direct Address and unique Kno2 credentials. The restriction that was encountered in Q1 and Q2 was resolved in time for Q3 and Q4 by using a certified Clinician (external provider) who has a Kno2 production account. The Clinician successfully received the CCDA within the stipulated time of 60 seconds.	Tested – Pass
§ 170.315(b)(2) Clinical Information Reconciliation and Incorporation – 180 seconds	After successful receipt of the CCDA, the Clinician validated it within ICANotes. They successfully reconciled the medication, medication allergy, and current problem list using the ICANotes software within the stipulated time of 180 seconds.	Tested – Pass
170.315(c)(1) Clinical Quality Measures Record and Export – 60 seconds	CQM was tested and verified within an appropriate location in ICANotes software, within the stipulated 60 seconds. The following day, CQM report was generated for Documentation of Current Medication and the report showed the patient under the Denominator and the Numerator to indicate we passed this measure.	Tested – Pass
§ 170.315(b)(1) Transitions of Care (Send) – 60 seconds	The Clinician sent the updated CCDA with minimal delay back to the external individual via Direct Protocol within the stipulated 60 seconds. The reconciled CCDA was also sent to Patient Portal.	Tested – Pass

Measurement/Metric	Report	Result
§ 170.315(e)(1) View, Download and Transmit to 3rd party – 3 minutes	The Clinicians accessed the patient portal using fake PHI and successfully Viewed, Downloaded and Transmitted the reconciled CCDA under the stipulated 3-minute time.	Tested – Pass
§ 170.315(b)(6) Data Export	The Clinicians accessed the ICANotes Upload Site and successfully did 3 different types of data exports. Measure 6 – Data Export (Immediate) Measure 7 – Data Export (Scheduled with specific date and time) Measure 8 – Data Export (Scheduled after work hours) The exported information was recorded and stored.	Tested – Pass
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person (patient) successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.	Tested – Pass
§170.315(b)(10) Electronic Health Information export	The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI) and also was able to successfully export the EHI for a population of patients. The user was able to perform this step successfully without any developer's assistance.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session in which all measures were attempted to be tested.

Overall, an averaged "Pass" status was achieved for all 11 measures tested by 1 Clinician (**MO**)

2 Clinicians (**GP and MB**) tested 8 measures successfully and couldn't test 3 measures linked to Kno2

Synopsis of the Measures that were successfully tested in Q4

REAL WORLD TESTING - RESULTS (December 2025)												
Measures / Rating / Clinician	Measure 1 - Transitions of Care (Receive)	Measure 2 - Clinical Information Reconciliation and Incorporation	Measure 3 - Clinical Quality Measures Record and Export	Measure 4 - Transitions of Care (Send)	Measure 5 - View, Download and Transmit to 3rd party	Measure 6 - Data Export (Immediate)	Measure 7 - Data Export (Scheduled w/ specific date & time)	Measure 8 - Data Export (Scheduled after	Measure 9 - Successfully registered for	Measure 10 - Electronic Health Information export	Measure 11 - Viewed entire CCDA in MyLink
MO- 12/03/2025	Tested Pass- 55 secs	Tested Pass- 177 Secs	Tested Pass- 52 Secs	Tested Pass- 58 Secs	Tested Pass- 174 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
GP- 12/10/2025	Not Tested	Not Tested	Tested Pass- 56 Secs	Not Tested	Tested Pass- 172 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass
MB- 12/22/2025	Not Tested	Not Tested	Tested Pass- 51 Secs	Not Tested	Tested Pass- 161 Secs	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass	Tested Pass

Not Tested: Measure 1, 2 and 4 – Kno2 credential error:

The Clinicians (**GP** and **MB**) were unable to test Measures 1, 2, and 4 due to the lack of access to their Kno2 account. This prevented the clinician from interacting with the platform, directly impacting the ability to test these measures.

Measure1, 2 and 4: Transition of Care (Receive), Medication Reconciliation and Transition of Care (Send)

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- The clinician was able to login to their Kno2 Direct Email account using their unique User ID and Password and retrieved the C-CDA.
- The C-CDA was successfully validated in the ICANotes EHR. After validating the C-CDA, the medication, allergies and diagnosis was successfully reconciled into the note.
- The clinician signed the note, and was able to send the updated C-CDA (Transition of care) to an external individual via Direct protocol and also to the patient portal
- The entire steps were completed in the time frame as mentioned above.
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- After reconciling the medications, allergies and diagnosis, all the testers were able to attach a service code For Example: **99203** and easily select the checkbox to indicate the Current Medications were Documented successfully in the note.
- The testers were able to complete the entire steps easily in the time frame mentioned above.

Measure 5: View, Download and Transmit to 3rd Party

- The testers were able to successfully login to Patient Portal using the de-identified test patient data and were able to view, download and transmit the reconciled C-CDA in the timeframe as mentioned above.

Measure 6 to 8: Data Export

- The clinicians accessed the ICANotes upload site and were able to successfully complete the 3 different types of data exports.
    - Measure 6 – Data Export (Immediate)
    - Measure 7 – Data Export (Scheduled with specific date and time)
    - Measure 8 – Data Export (Scheduled after work hours)

Measure 9: Application Access – Patient Selection

- The tester successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes.

Measure 10: Electronic health Information export

- The authorized user or the clinician was able to successfully export a single patient Electronic Health Information (EHI)
- This user was also able to export Electronic Health Information (EHI) for a patient population.
- The user was able to successfully perform the Electronic health Information (EHI) export without a developer's assistance.

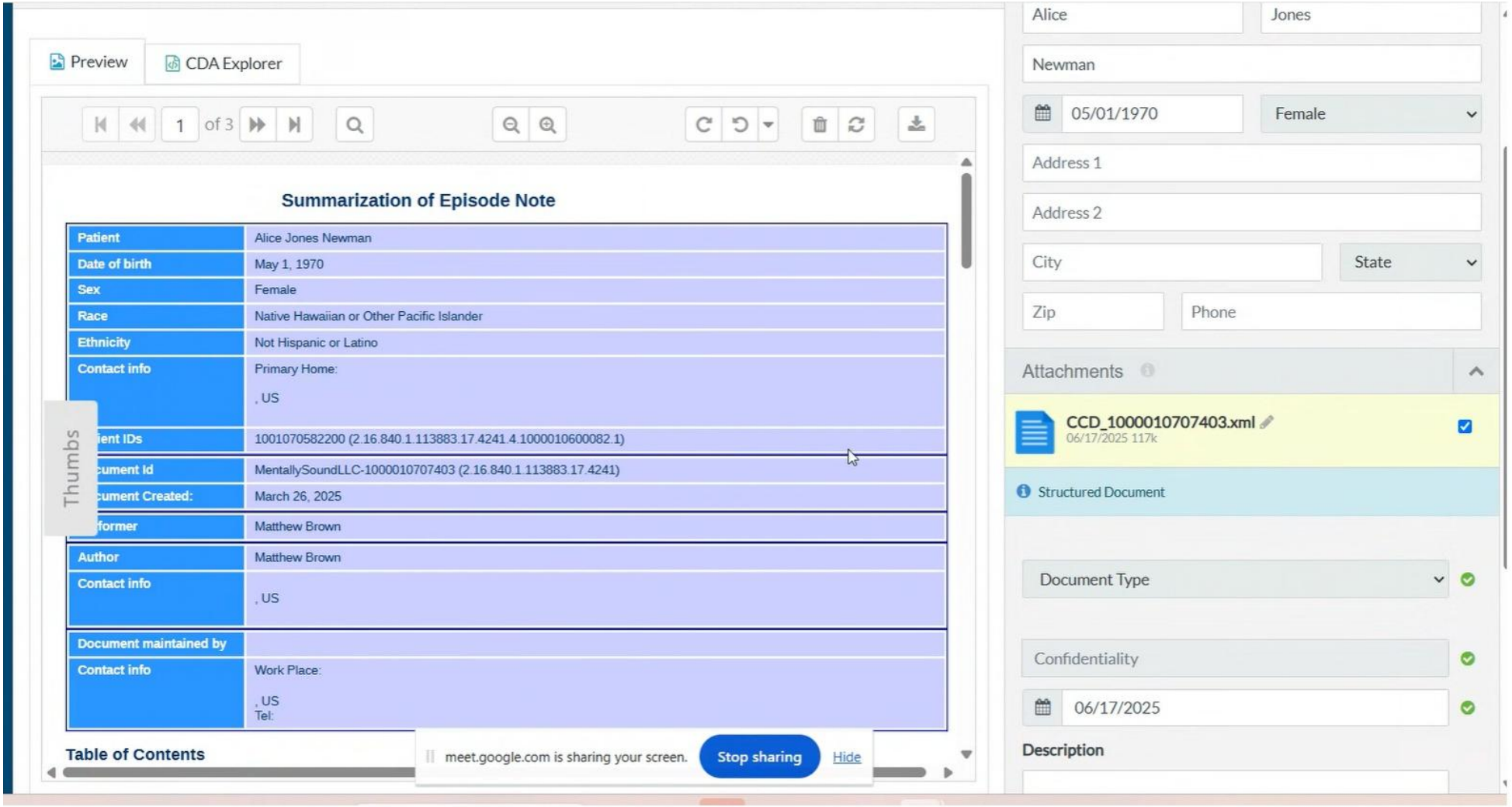
Measure 11: **Application Access – All Data Request**

- After receiving the registration email, the tester was able to successfully register the fake PHI for the first time and authorized the data access to the 3rd party application
- The tester was able to complete the registration in the MyLinks application and gathered the records successfully
- After gathering the record, the tester was able to generate the authorized user's completed C-CDA in a human readable format

Screenshots for measures tested successfully.

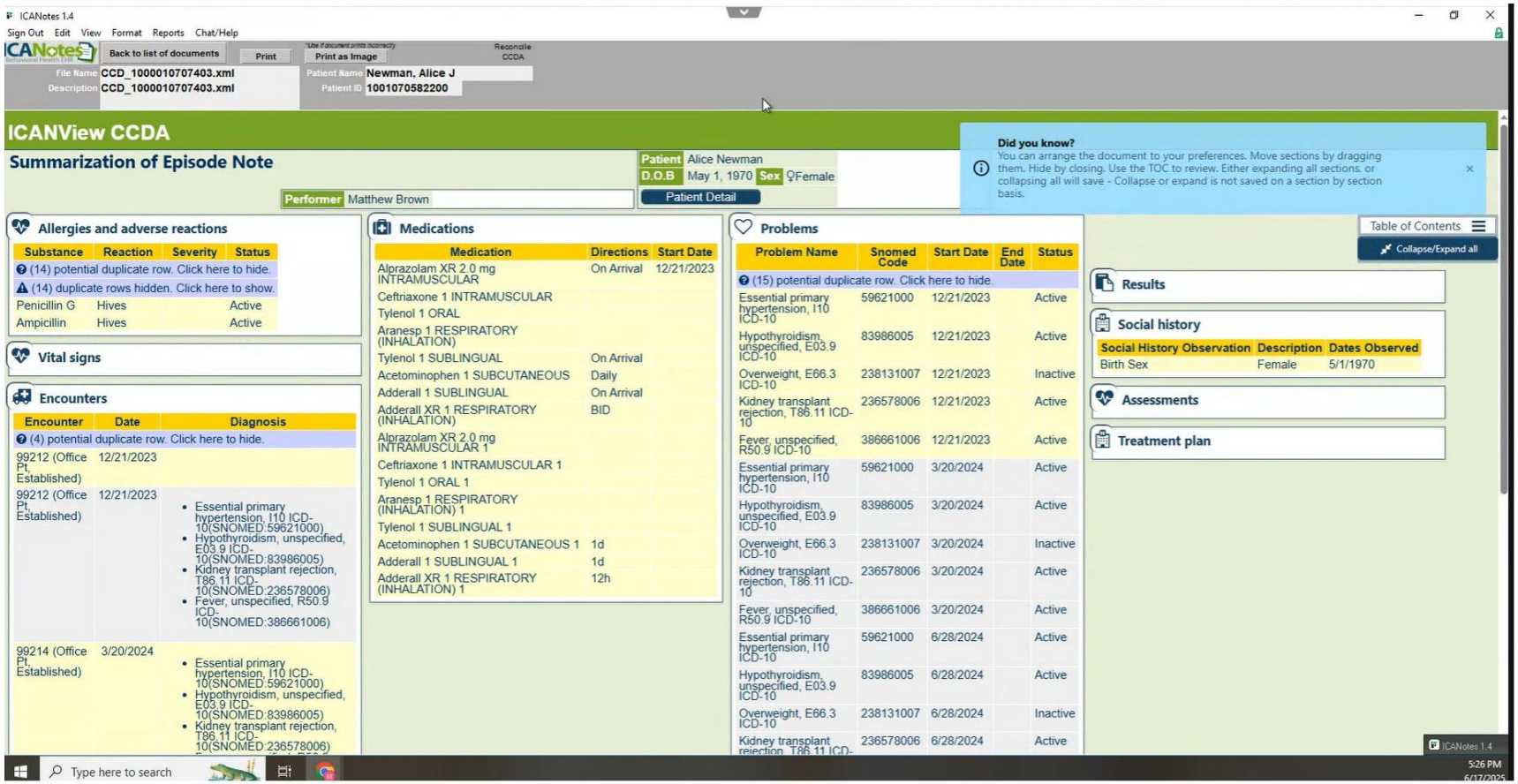
Measure 1: Transitions of Care (Receive)

This image indicates that the tester was able to successfully receive the C-CDA from an external individual as Transition of Care using Direct protocol.

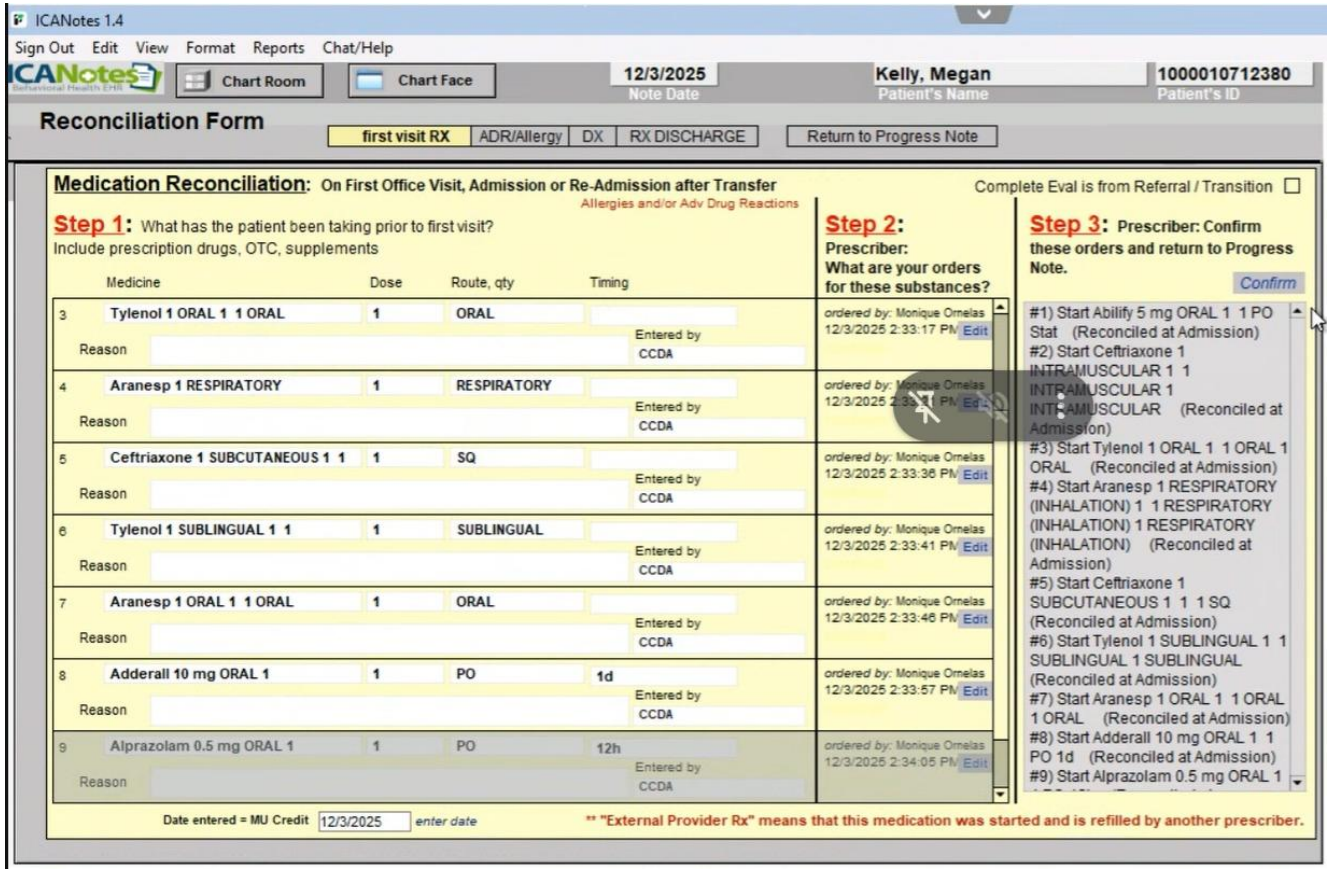


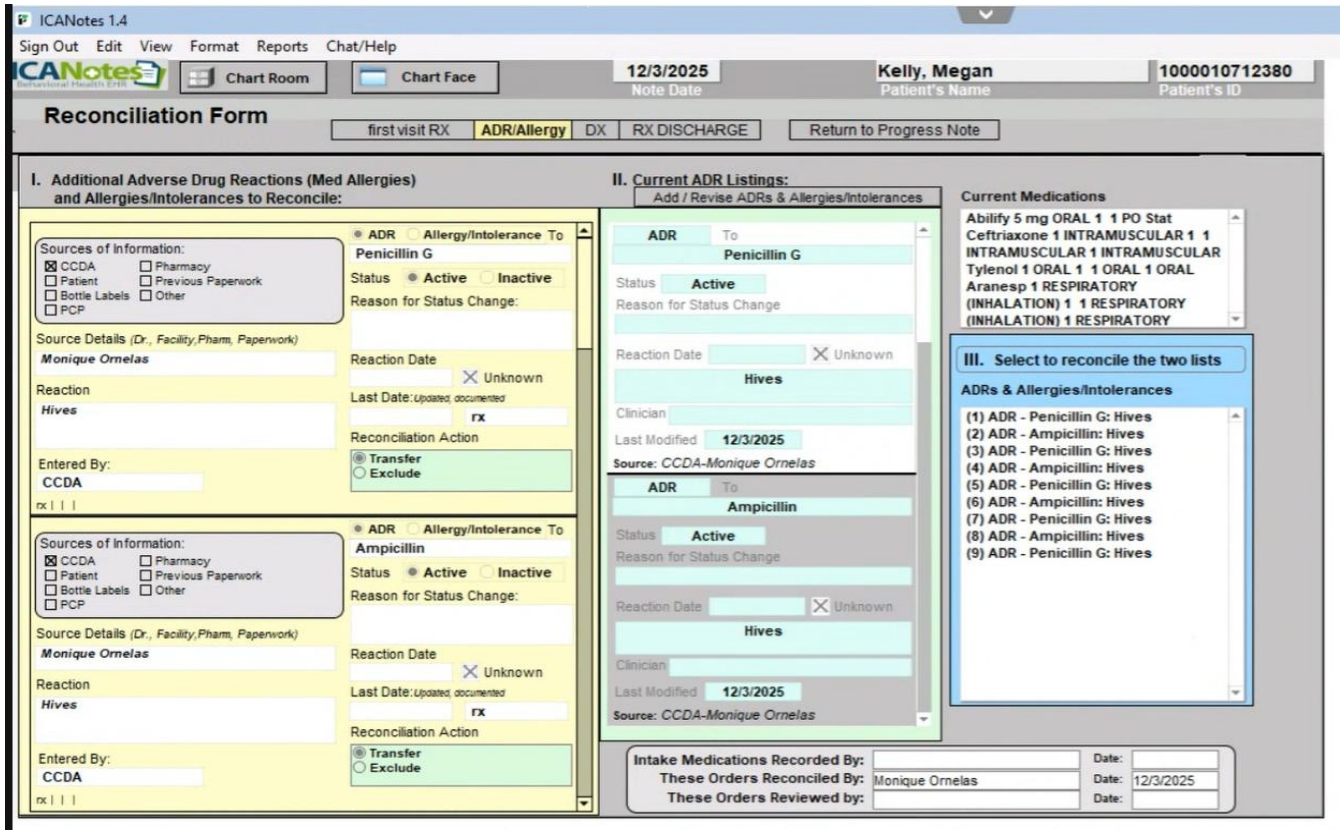
Measure 2: Clinical Information Reconciliation and Incorporation

This image indicates that the C-CDA received by the tester via Direct protocol was successfully validated in ICANotes EHR.

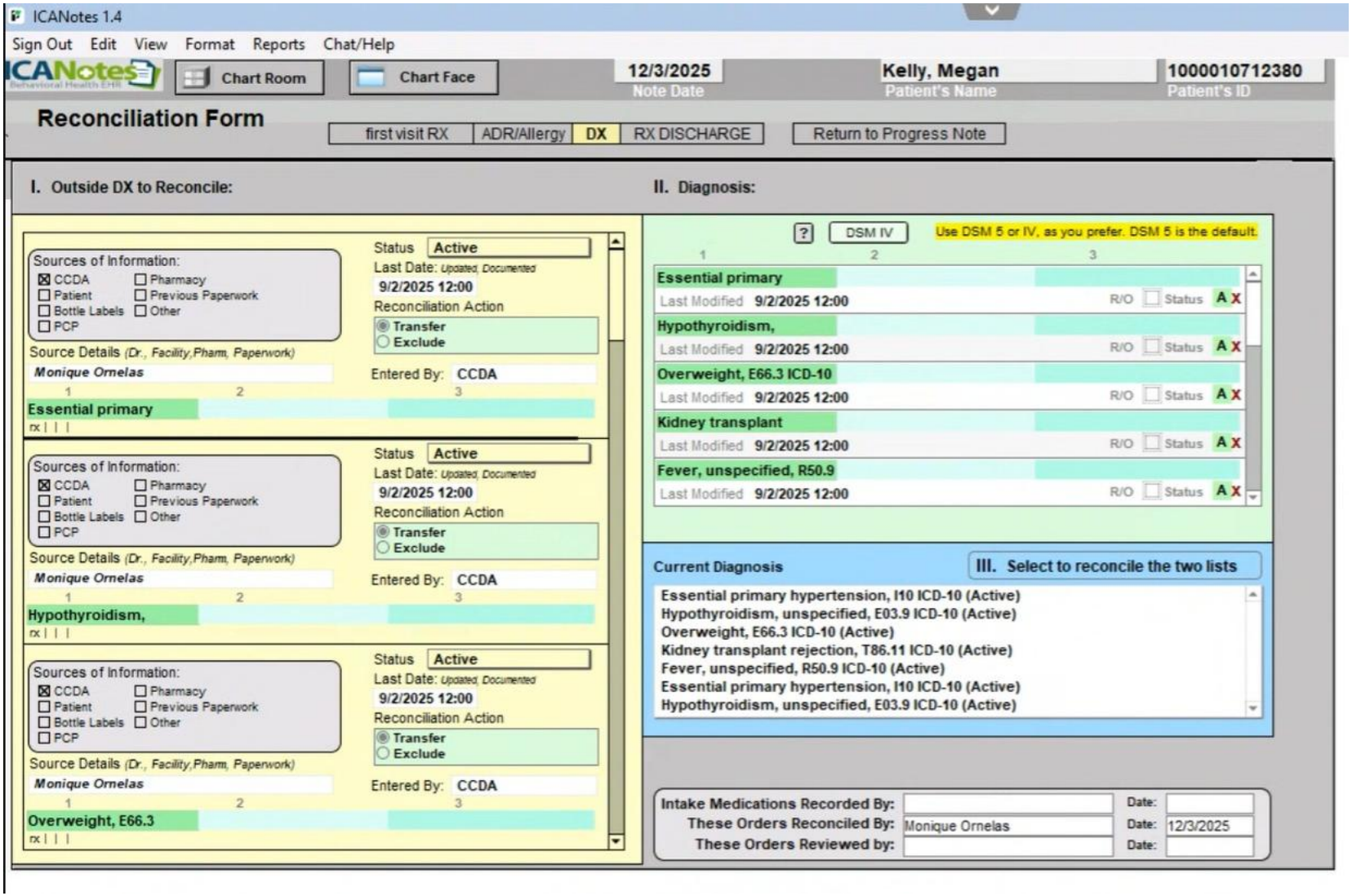


The images below indicate that after successfully validating the C-CDA in ICANotes, the Medication and Allergies were successfully reconciled in the note


ICANotes 1.4
Sign Out Edit View Format Reports Chat/Help
Chart Room
Chart Face
12/3/2025
Note Date
Kelly, Megan
Patient's Name
1000010712380
Patient's ID
Reconciliation Form
first visit RX
ADR/Allergy
DX
RX DISCHARGE
Return to Progress Note
Medication Reconciliation: On First Office Visit, Admission or Re-Admission after Transfer
Complete Eval is from Referral / Transition
Allergies and/or Adv Drug Reactions
Step 1: What has the patient been taking prior to first visit?
Include prescription drugs, OTC, supplements
Medicine
Dose
Route, qty
Timing
3 Tylenol 1 ORAL 1 1 ORAL 1 ORAL
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:17 PM Edit
4 Aranesp 1 RESPIRATORY 1 RESPIRATORY
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:31 PM Edit
5 Ceftriaxone 1 SUBCUTANEOUS 1 1 1 SQ
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:36 PM Edit
6 Tylenol 1 SUBLINGUAL 1 1 1 SUBLINGUAL
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:41 PM Edit
7 Aranesp 1 ORAL 1 1 ORAL 1 ORAL
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:46 PM Edit
8 Adderall 10 mg ORAL 1 1 PO 1d
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:33:57 PM Edit
9 Alprazolam 0.5 mg ORAL 1 1 PO 12h
Reason
Entered by CCDA
ordered by: Monique Ornelas 12/3/2025 2:34:05 PM Edit
Step 2: Prescriber: What are your orders for these substances?
Step 3: Prescriber: Confirm these orders and return to Progress Note.
Confirm
#1) Start Abilify 5 mg ORAL 1 1 PO Stat (Reconciled at Admission)
#2) Start Ceftriaxone 1 INTRAMUSCULAR 1 1 INTRAMUSCULAR 1 INTRAMUSCULAR (Reconciled at Admission)
#3) Start Tylenol 1 ORAL 1 1 ORAL 1 ORAL (Reconciled at Admission)
#4) Start Aranesp 1 RESPIRATORY (INHALATION) 1 1 RESPIRATORY (INHALATION) 1 RESPIRATORY (INHALATION) (Reconciled at Admission)
#5) Start Ceftriaxone 1 SUBCUTANEOUS 1 1 1 SQ (Reconciled at Admission)
#6) Start Tylenol 1 SUBLINGUAL 1 1 SUBLINGUAL 1 SUBLINGUAL (Reconciled at Admission)
#7) Start Aranesp 1 ORAL 1 1 ORAL 1 ORAL (Reconciled at Admission)
#8) Start Adderall 10 mg ORAL 1 1 PO 1d (Reconciled at Admission)
#9) Start Alprazolam 0.5 mg ORAL 1
Date entered = MU Credit 12/3/2025 enter date
** "External Provider Rx" means that this medication was started and is refilled by another prescriber.

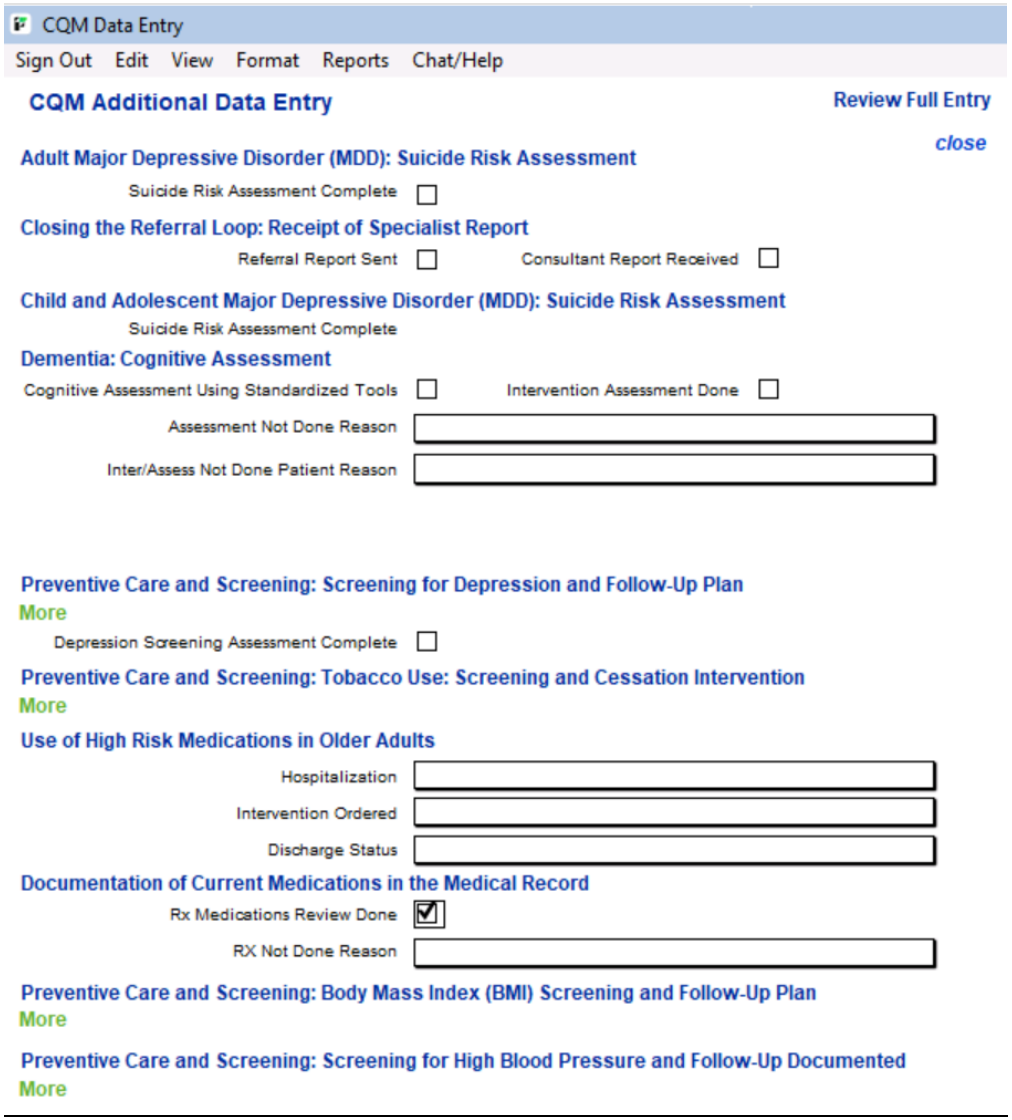

ICANotes 1.4
Sign Out Edit View Format Reports Chat/Help
Chart Room
Chart Face
12/3/2025
Note Date
Kelly, Megan
Patient's Name
1000010712380
Patient's ID
Reconciliation Form
first visit RX
ADR/Allergy
DX
RX DISCHARGE
Return to Progress Note
I. Additional Adverse Drug Reactions (Med Allergies) and Allergies/Intolerances to Reconcile:
Sources of Information:
CCDA
Pharmacy
Patient
Previous Paperwork
Bottle Labels
Other
PCP
Source Details (Dr., Facility,Pharm, Paperwork)
Monique Ornelas
Reaction
Hives
Entered By:
CCDA
rx
ADR
Allergy/Intolerance
To
Penicillin G
Status
Active
Inactive
Reason for Status Change:
Reaction Date
Unknown
Last Date: Updated, documented
rx
Reconciliation Action
Transfer
Exclude
Sources of Information:
CCDA
Pharmacy
Patient
Previous Paperwork
Bottle Labels
Other
PCP
Source Details (Dr., Facility,Pharm, Paperwork)
Monique Ornelas
Reaction
Hives
Entered By:
CCDA
rx
ADR
Allergy/Intolerance
To
Ampicillin
Status
Active
Inactive
Reason for Status Change:
Reaction Date
Unknown
Last Date: Updated, documented
rx
Reconciliation Action
Transfer
Exclude
II. Current ADR Listings:
Add / Revise ADRs & Allergies/Intolerances
ADR
To
Penicillin G
Status
Active
Reason for Status Change
Reaction Date
Unknown
Hives
Clinician
Last Modified
12/3/2025
Source: CCDA-Monique Ornelas
ADR
To
Ampicillin
Status
Active
Reason for Status Change
Reaction Date
Unknown
Hives
Clinician
Last Modified
12/3/2025
Source: CCDA-Monique Ornelas
Current Medications
Abilify 5 mg ORAL 1 1 PO Stat
Ceftriaxone 1 INTRAMUSCULAR 1 1
INTRAMUSCULAR 1 INTRAMUSCULAR
Tylenol 1 ORAL 1 1 ORAL 1 ORAL
Aranesp 1 RESPIRATORY
(INHALATION) 1 1 RESPIRATORY
(INHALATION) 1 RESPIRATORY
III. Select to reconcile the two lists
ADRs & Allergies/Intolerances
(1) ADR - Penicillin G: Hives
(2) ADR - Ampicillin: Hives
(3) ADR - Penicillin G: Hives
(4) ADR - Ampicillin: Hives
(5) ADR - Penicillin G: Hives
(6) ADR - Ampicillin: Hives
(7) ADR - Penicillin G: Hives
(8) ADR - Ampicillin: Hives
(9) ADR - Penicillin G: Hives
Intake Medications Recorded By:
Date:
These Orders Reconciled By:
Monique Ornelas
Date:
12/3/2025
These Orders Reviewed by:
Date:

The image below indicate that the tester was able to successfully reconcile the diagnosis in the note.

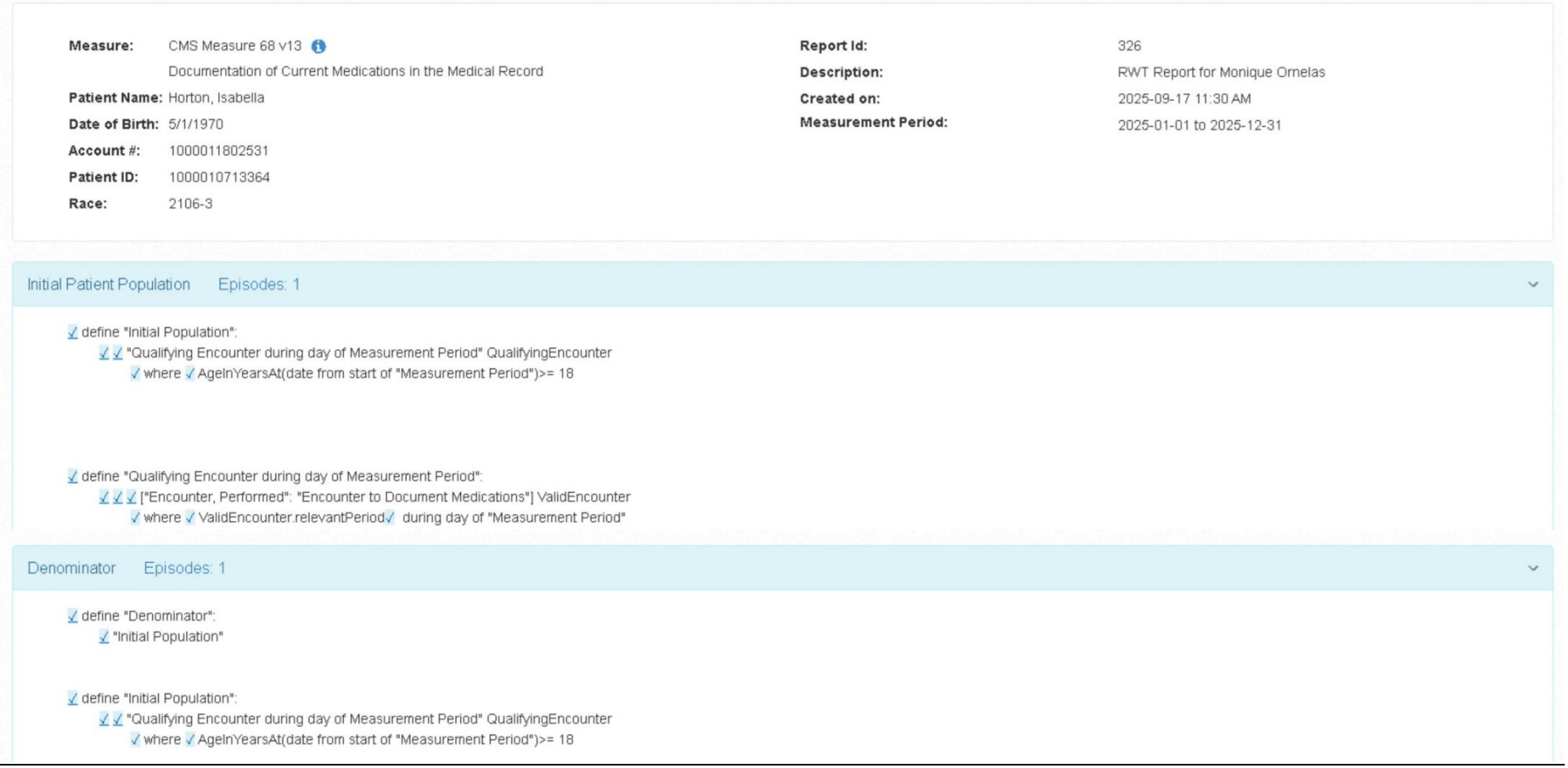


Measure 3: Clinical Quality Measures Record

The image indicates that the tester was able to successfully click the checkbox for “Rx Medication Review Done” for Documentation of Current Medication



This image indicates the Documentation of Current Medication eCQM report with patient listed under Initial Patient Population and Denominator



This image indicates that the patient is also listed under the Numerator and also lists the patient's name and the service code used in the note by the clinician

Numerator Episodes: 1

```
define "Numerator":
  "Qualifying Encounter during day of Measurement Period" QualifyingEncounter
    with ( ["Procedure, Performed": "Documentation of current medications (procedure)"]
      union ["Intervention, Performed": "Documentation of current medications (procedure)"] ) MedicationsDocumented
      such that Global."NormalizeInterval" ( MedicationsDocumented.relevantDatetime, MedicationsDocumented.relevantPeriod ) during QualifyingEncounter.relevantPeriod


define "Qualifying Encounter during day of Measurement Period":
  ["Encounter, Performed": "Encounter to Document Medications"] ValidEncounter
    where ValidEncounter.relevantPeriod during day of "Measurement Period"
```

Patient Data

CLIENT

	Name Last▲	Name First	Name Middle	Date Of Birth	Gender
+	Horton	Isabella		5/1/1970 5:30:53 AM	F

ENCOUNTERS

	Date Start(Admission)▲	Date Stop(Discharge)	Code	Code System Name	Code Description	Status
+	9/2/2025 12:00:01 AM	9/2/2025 12:01:00 AM	99203	CPT	NULL	PRF

This image indicates the medication reconciled in the note and also indicates the SNOMED code used for Documentation of Current Medication eCQM.

MEDICATIONS

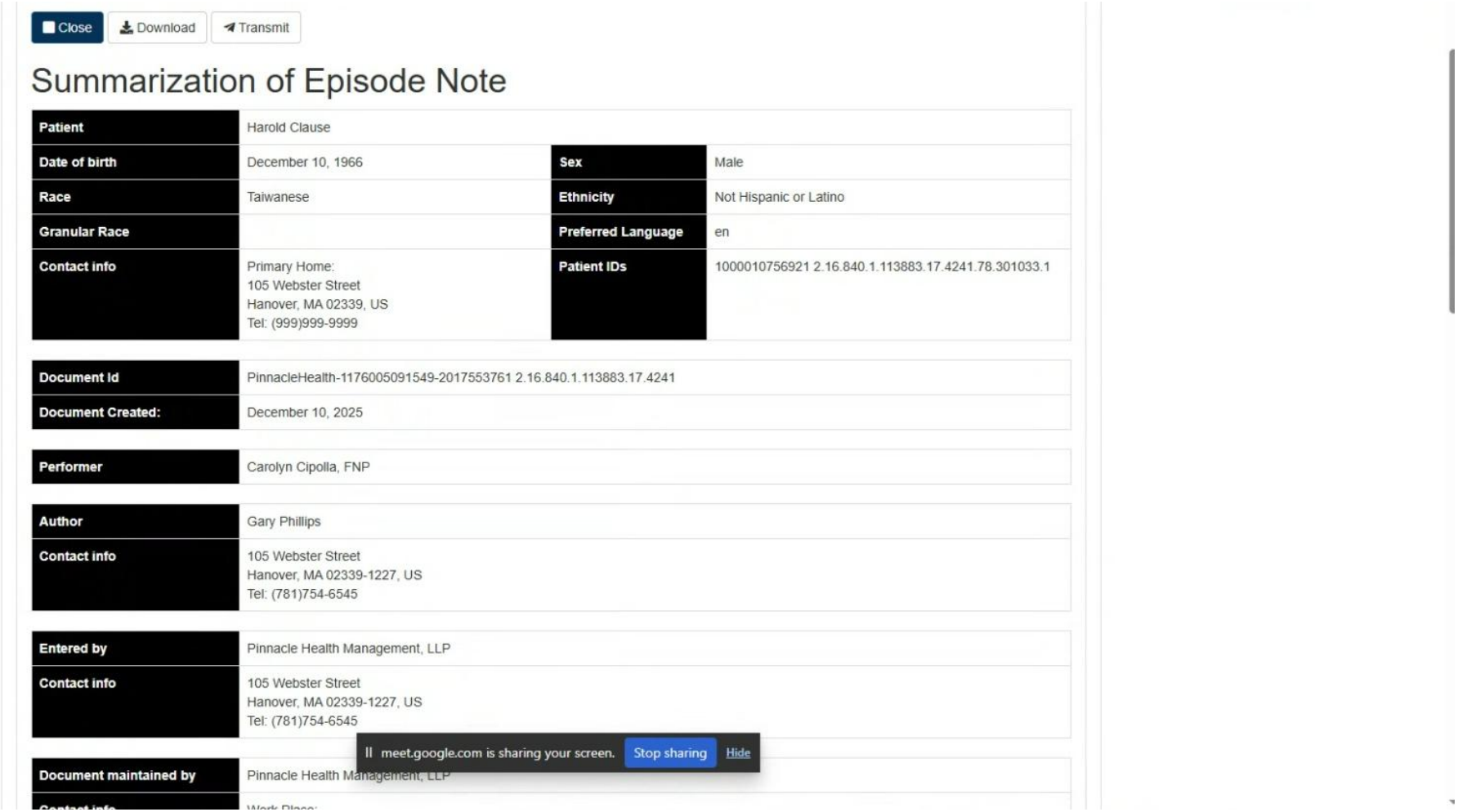
	Date Started▲	Date Stopped	Product Code	Generic Name	Product Name
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	404602	Abilify 5 mg ORAL	Abilify 5 mg ORAL
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	541894	Adderall 10 mg ORAL	Adderall 10 mg ORAL
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	141928	Alprazolam 0.5 mg ORAL	Alprazolam 0.5 mg ORAL
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	731241	Aranesp 1 ORAL 1	Aranesp 1 ORAL 1
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	731241	Aranesp 1 RESPIRATORY (INHALATION) 1	Aranesp 1 RESPIRATORY (INHALATION) 1
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	309090	Ceftriaxone 1 INTRAMUSCULAR 1	Ceftriaxone 1 INTRAMUSCULAR 1
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	309090	Ceftriaxone 1 SUBCUTANEOUS 1	Ceftriaxone 1 SUBCUTANEOUS 1
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	209459	Tylenol 1 ORAL 1	Tylenol 1 ORAL 1
+	9/2/2025 12:00:00 AM	9/3/2025 12:00:00 AM	209459	Tylenol 1 SUBLINGUAL 1	Tylenol 1 SUBLINGUAL 1

PROCEDURES

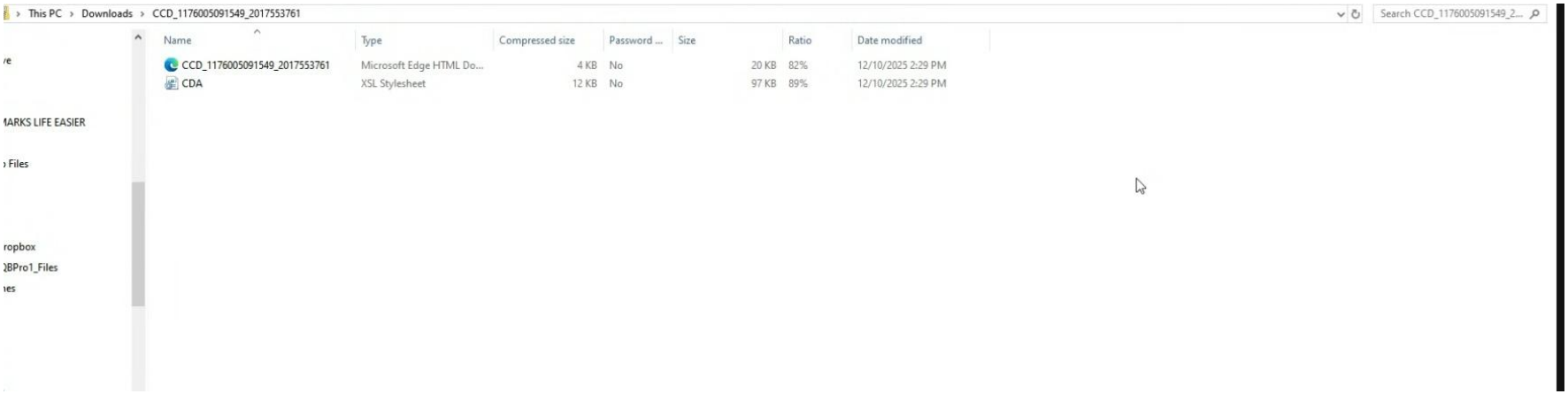
	Code	Reason Name	Code System Name	Date Start▲	Date Stop	Status
+	428191000124101		Documentation of current medications (procedure)	9/2/2025 12:00:05 AM	9/2/2025 12:00:10 AM	PRF

Measure 5: View, Download and Transmit to 3rd party

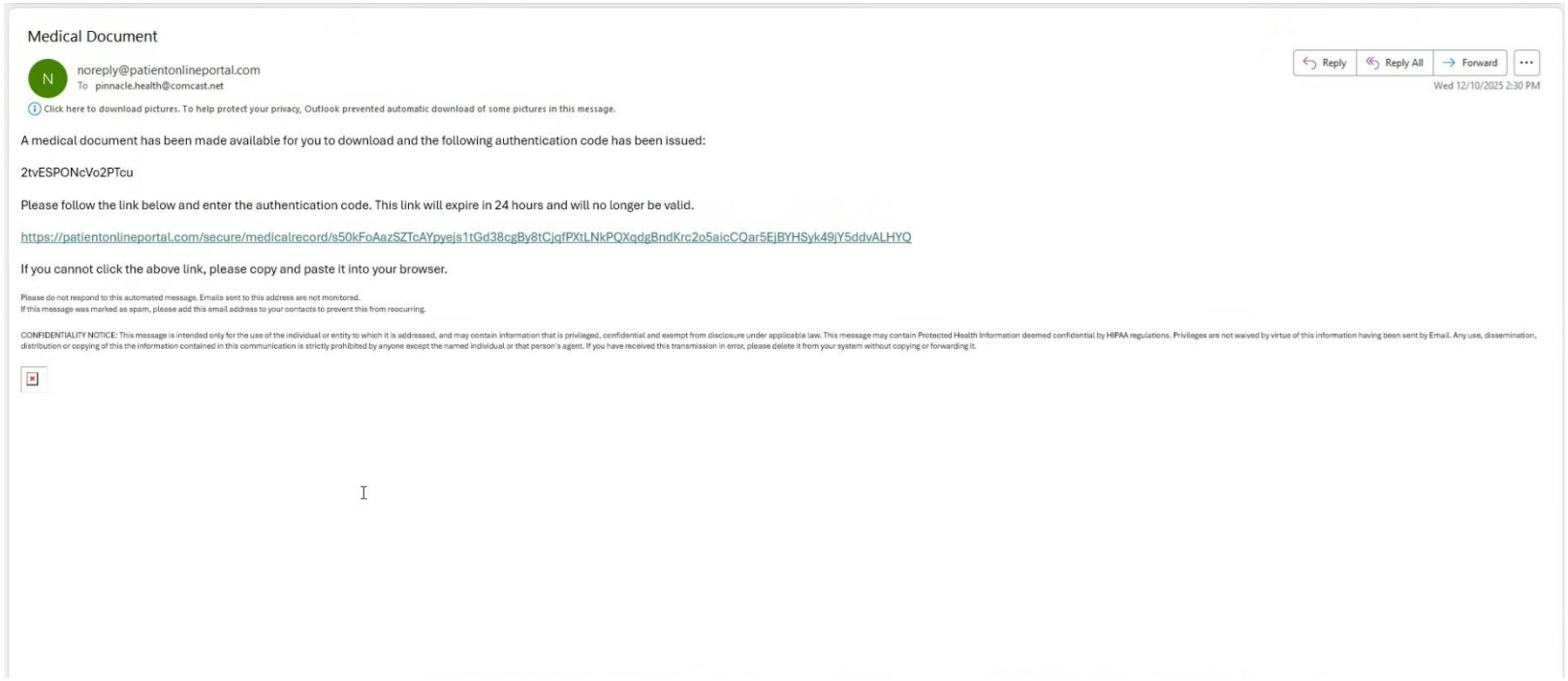
This image indicates that the patient can **view** their medical record of their visit on the patient portal.



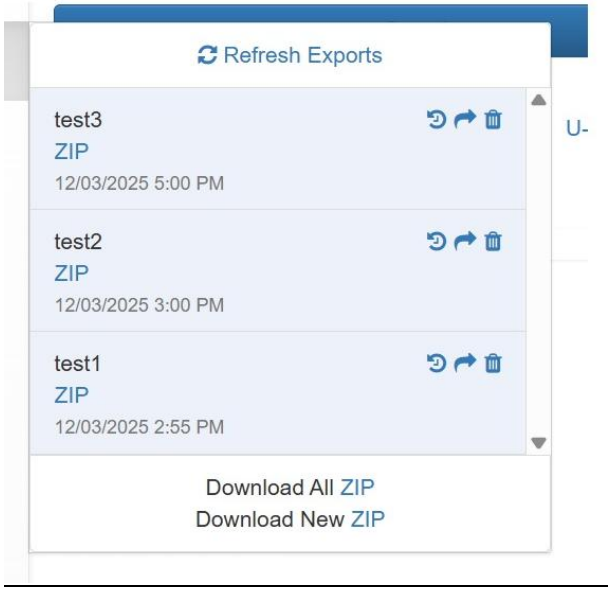
This image indicates that the patient can **download** their medical record to their local device from the patient portal.

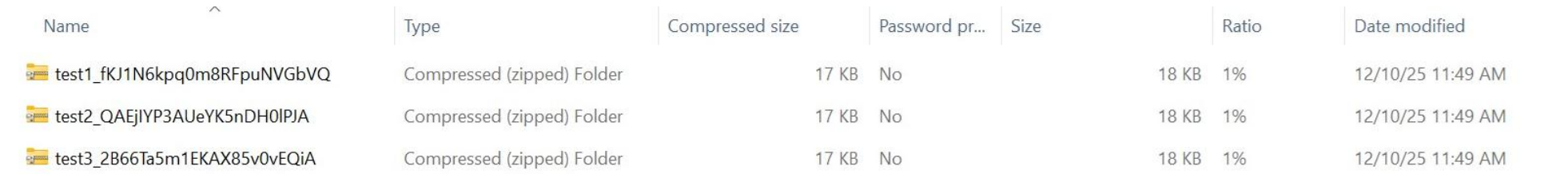


This image indicates that the patient can **transmit** their medical records to an email securely from the patient portal



Measure 6 - 8: Data Export





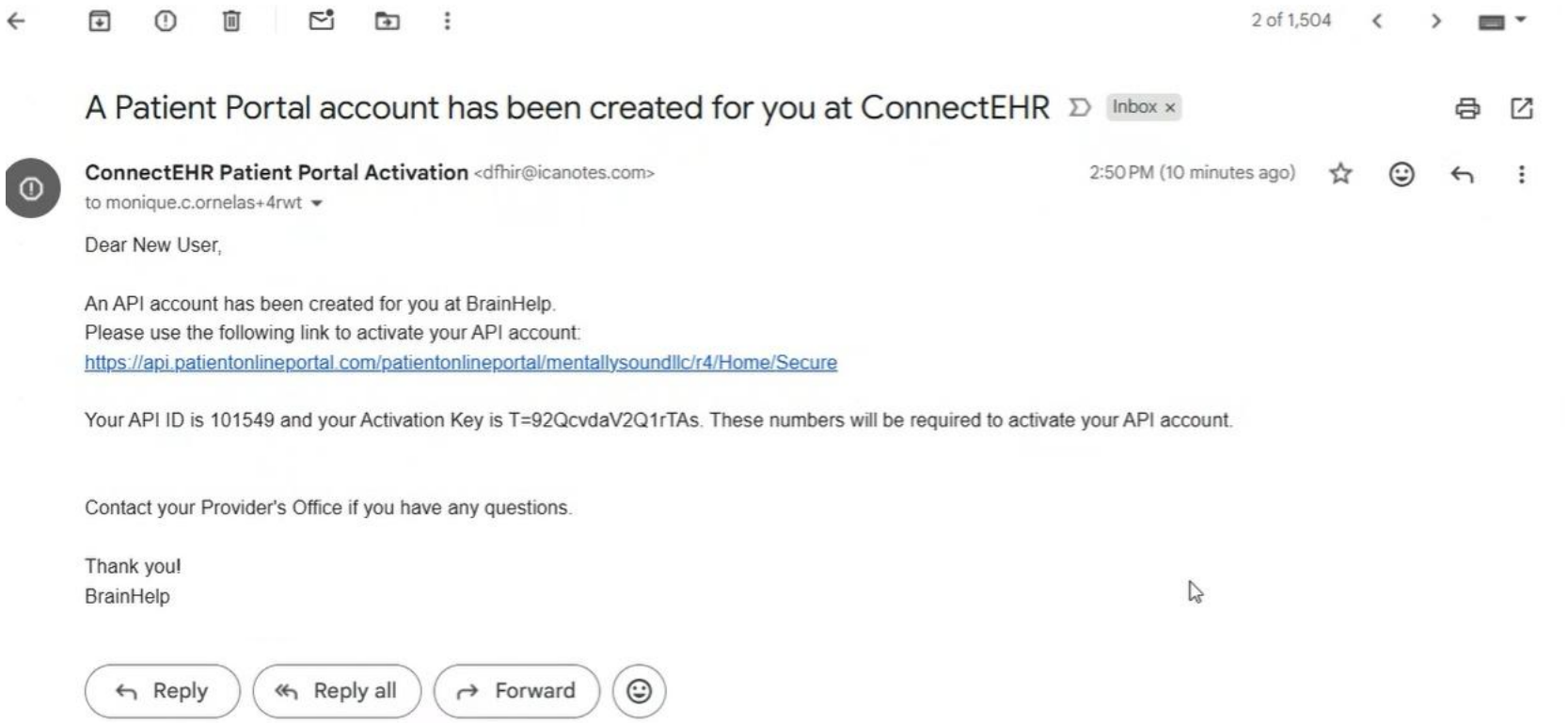
Name	Type	Compressed size	Password pr...	Size	Ratio	Date modified
test1_fKJ1N6kpq0m8RFpuNVGbVQ	Compressed (zipped) Folder	17 KB	No	18 KB	1%	12/10/25 11:49 AM
test2_QAEjIYP3AUeYK5nDH0lPJA	Compressed (zipped) Folder	17 KB	No	18 KB	1%	12/10/25 11:49 AM
test3_2B66Ta5m1EKAX85v0vEQiA	Compressed (zipped) Folder	17 KB	No	18 KB	1%	12/10/25 11:49 AM

The image above displays the requested exports for Measures 6 through 8.

1.“record”: Measure 6 – Data Export (Immediate)
2.“record required”: Measure 7 – Data Export (Scheduled with specific date and time)
3.“record required2”: Measure 8 – Data Export (Scheduled after work hours)

Measure 9: Application Access – Patient Selection

This image indicates the details sent to the patient's email with their credentials to activate the API access to receive their health record



2 of 1,504

A Patient Portal account has been created for you at ConnectEHR Inbox ×

ConnectEHR Patient Portal Activation <dfhir@icanotes.com> 2:50 PM (10 minutes ago)

to monique.c.ornelas+4rwt

Dear New User,

An API account has been created for you at BrainHelp.
Please use the following link to activate your API account:
https://api.patientonlineportal.com/patientonlineportal/mentallysoundllc/r4/Home/Secure

Your API ID is 101549 and your Activation Key is T=92QcvdaV2Q1rTAs. These numbers will be required to activate your API account.

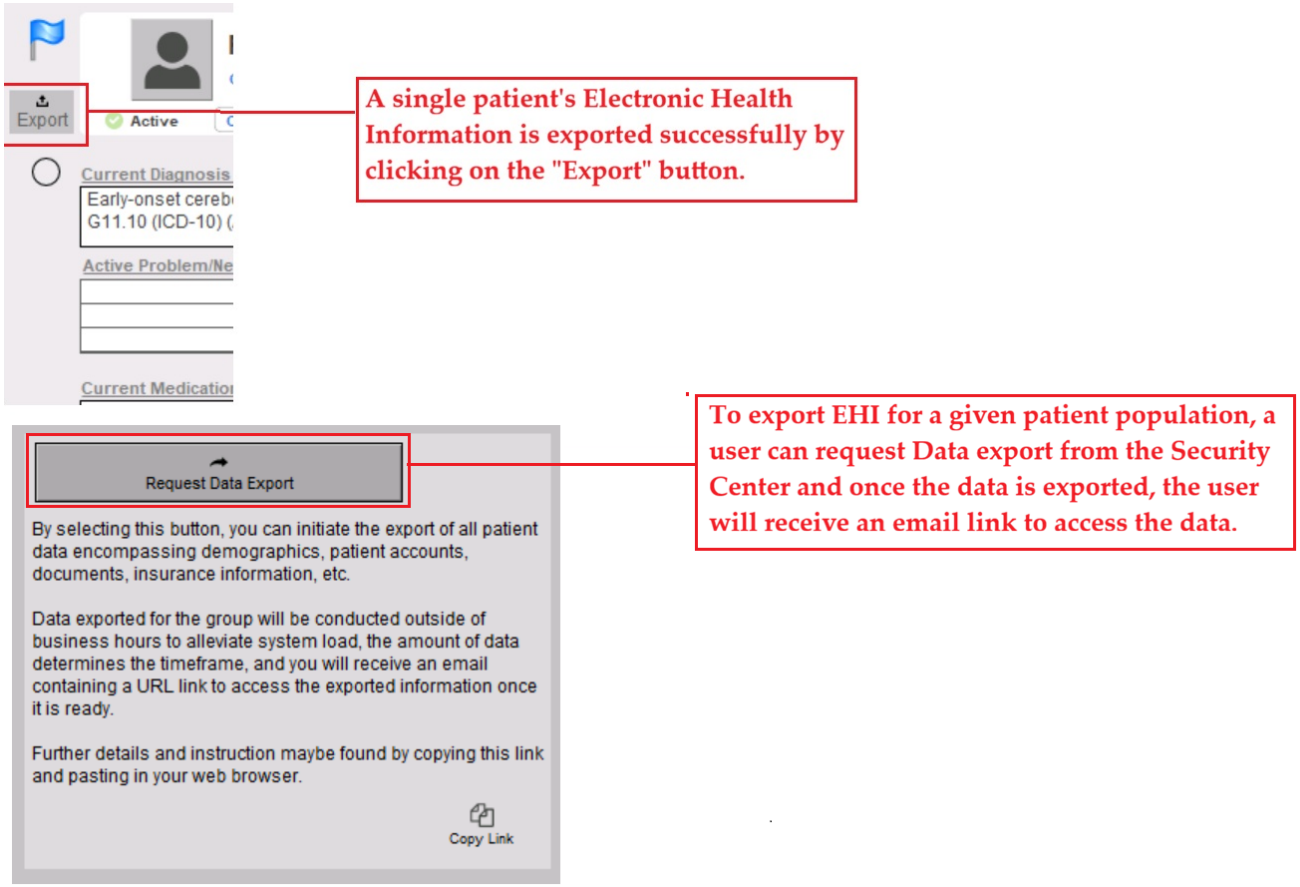
Contact your Provider's Office if you have any questions.

Thank you!
BrainHelp

Reply Reply all Forward

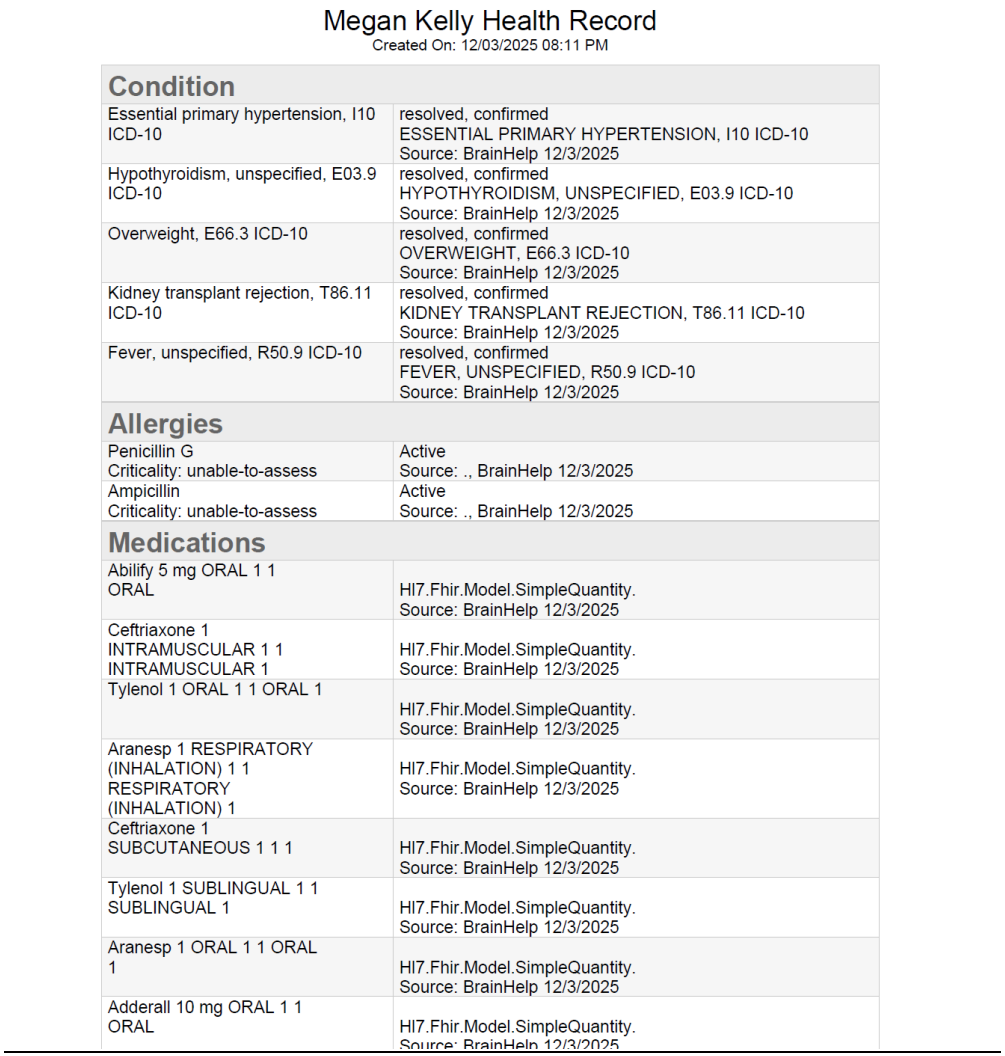
Measure 10: Electronic health Information export

This image indicates a practice user/ Clinician can easily export patient's/ given patient population Electronic Health Information (EHI) without a developer's assistance.



Measure 11: Application Access – All Data Request

This image indicates that the patient can gather their Health Records from a third-party application and convert it into a human-readable format like pdf



Megan Kelly Health Record

Created On: 12/03/2025 08:11 PM

Condition	
Essential primary hypertension, I10 ICD-10	resolved, confirmed ESSENTIAL PRIMARY HYPERTENSION, I10 ICD-10 Source: BrainHelp 12/3/2025
Hypothyroidism, unspecified, E03.9 ICD-10	resolved, confirmed HYPOTHYROIDISM, UNSPECIFIED, E03.9 ICD-10 Source: BrainHelp 12/3/2025
Overweight, E66.3 ICD-10	resolved, confirmed OVERWEIGHT, E66.3 ICD-10 Source: BrainHelp 12/3/2025
Kidney transplant rejection, T86.11 ICD-10	resolved, confirmed KIDNEY TRANSPLANT REJECTION, T86.11 ICD-10 Source: BrainHelp 12/3/2025
Fever, unspecified, R50.9 ICD-10	resolved, confirmed FEVER, UNSPECIFIED, R50.9 ICD-10 Source: BrainHelp 12/3/2025
Allergies	
Penicillin G Criticality: unable-to-assess	Active Source: ., BrainHelp 12/3/2025
Ampicillin Criticality: unable-to-assess	Active Source: ., BrainHelp 12/3/2025
Medications	
Abilify 5 mg ORAL 1 1 ORAL	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Ceftriaxone 1 INTRAMUSCULAR 1 1 INTRAMUSCULAR 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Tylenol 1 ORAL 1 1 ORAL 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Aranesp 1 RESPIRATORY (INHALATION) 1 1 RESPIRATORY (INHALATION) 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Ceftriaxone 1 SUBCUTANEOUS 1 1 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Tylenol 1 SUBLINGUAL 1 1 SUBLINGUAL 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Aranesp 1 ORAL 1 1 ORAL 1	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025
Adderall 10 mg ORAL 1 1 ORAL	HI7.Fhir.Model.SimpleQuantity. Source: BrainHelp 12/3/2025