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

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 the applicable certification criteria for §170.315(g)(7) Application Access – Patient Selection and §170.315(g)(9) Application Access – All Data Request.

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 includes both internal ICANotes staff and individuals outside the organization to ensure a comprehensive, real-world evaluation.

Testing sessions are conducted via Google Meets in the production environment. Demographic information is de-identified to protect patient privacy. Each testing session includes a clinician or practice staff member, an ICANotes representative supporting the session, and an ICANotes observer who documents the results. External individuals outside the organization are also engaged to independently verify functionality. 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. 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

The following certification criteria are addressed in this Real World Testing plan:

Measurement/Metric	Associated Certification Criteria
Measure 9	§ 170.315(g)(7) Application Access – Patient Selection
Measure 11	§ 170.315(g)(9) Application Access – All Data Request

MEASURE DESCRIPTIONS

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. Testing is conducted both internally by ICANotes staff and by individuals outside the organization. This will meet § 170.315(g)(7).
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. Testing is conducted both internally by ICANotes staff and by individuals outside the organization. This will meet § 170.315(g)(9).

REPORT AND RESULTS – Q1: March 2025

Expected outcomes for the 2 events will include the following data points:

- Total number of events tested: 2
- Number of passed (i.e. successful) events: 2
- Number of passed and partial completions: 0
- Number of not tested / incomplete events: 0

Measurement/Metric	Report	Result
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	**Tested – Pass**

§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	**Tested – Pass**

Three (3) Clinicians/Practice staff members participated in a single session for Q1. All measures were tested and passed by internal staff and external participants outside the organization.

Synopsis of Q1 Results

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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

Measure 11: Application Access – All Data Request

- After receiving the registration email, the tester was able to successfully register the de-identified test patient data 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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

REPORT AND RESULTS – Q2: June 2025

Expected outcomes for the 2 events will include the following data points:
- Total number of events tested: 2
- Number of passed (i.e. successful) events: 2
- Number of passed and partial completions: 0
- Number of not tested / incomplete events: 0

Measurement/Metric	Report	Result
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	**Tested – Pass**
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	**Tested – Pass**

Three (3) Clinicians/Practice staff members participated in a single session for Q2. All measures were tested and passed by internal staff and external participants outside the organization.

Synopsis of Q2 Results

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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

Measure 11: Application Access – All Data Request

- After receiving the registration email, the tester was able to successfully register the de-identified test patient data 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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

REPORT AND RESULTS – Q3: September 2025

Expected outcomes for the 2 events will include the following data points:

- Total number of events tested: 2
- Number of passed (i.e. successful) events: 2
- Number of passed and partial completions: 0
- Number of not tested / incomplete events: 0

Measurement/Metric	Report	Result
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session for Q3. All measures were tested and passed by internal staff and external participants outside the organization.

Synopsis of Q3 Results

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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

Measure 11: Application Access – All Data Request

- After receiving the registration email, the tester was able to successfully register the de-identified test patient data 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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.

REPORT AND RESULTS – Q4: December 2025

Expected outcomes for the 2 events will include the following data points:

- Total number of events tested: 2
- Number of passed (i.e. successful) events: 2
- Number of passed and partial completions: 0
- Number of not tested / incomplete events: 0

Measurement/Metric	Report	Result
§ 170.315(g)(7) Application Access – Patient Selection	The authorized person successfully received the registration email for the third-party API software after enabling the feature from the Demographics section of ICANotes. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	Tested – Pass
§ 170.315(g)(9) Application Access – All Data Request	The third-party software successfully generated the authorized user's complete CCDA. Testing was conducted by both internal ICANotes staff and external participants outside the organization.	Tested – Pass

Three (3) Clinicians/Practice staff members participated in a single session for Q4. All measures were tested and passed by internal staff and external participants outside the organization.

Synopsis of Q4 Results

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.

- This testing was completed by both internal ICANotes staff and individuals outside the organization.

Measure 11: Application Access – All Data Request

- After receiving the registration email, the tester was able to successfully register the de-identified test patient data 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.
- This testing was completed by both internal ICANotes staff and individuals outside the organization.