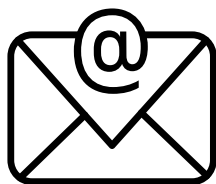




IS YOUR CLINIC INTERESTED IN THE COLLECTIVE PLATFORM?

WHETHER YOU ARE A TRIBAL CLINIC, PRIMARY CARE CLINIC, OR BEHAVIORAL HEALTH CLINIC, FOLLOW THIS GUIDE TO GET STARTED.



1

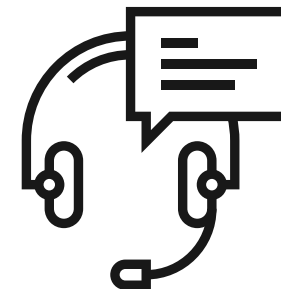
EMAIL THE COLLECTIVE MEDICAL SUPPORT TEAM

SUPPORT@COLLECTIVEMEDICAL.COM



2

RECEIVE AN AUTOMATED MESSAGE WITH A TICKET NUMBER TO TRACK REQUEST



3

COLLECTIVE SUPPORT TEAM REACHES OUT WITH NEXT STEPS TO ONBOARD THE CLINIC.

IN PARTNERSHIP WITH





STEP 1: EMAIL THE COLLECTIVE MEDICAL SUPPORT TEAM

The first step in gaining access to the Collective Platform is reaching out to the Collective Medical Support Team.

SAMPLE EMAIL TEMPLATE

Address: support@collectivemedical.com

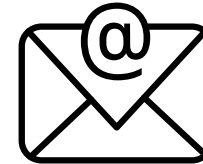
Subject: Clinic request for Collective Platform Access

Message Body:

Support Team,

Our clinic [Name] would like to begin the onboarding process with the Collective Platform.

Please be in touch with the next steps.





STEP 2: RECEIVE A TICKET NUMBER TO TRACK REQUEST

Collective Community ("Help" section)

- Once you implement the Collective Platform, the Collective Community is available directly from the Help page within the platform.
- While you wait for Collective Platform to be implemented, you can still request access to the Collective Community at:
 - <https://community.collectivemedical.com/>
 - You won't have access to PHI—just webinars, materials and other helpful resources.
- Within the Community, there's an Oregon Resources section:
 - <https://community.collectivemedical.com/tag/oregon-resources>
- Key Community resources:
 - [Collective Platform for Beginners](#)

WHILE YOU WAIT FOR STEP THREE, HERE ARE SOME USEFUL RESOURCES TO HELP GET YOU ACQUAINTED WITH THE COLLECTIVE PLATFORM.

HIT Commons Resources

- [HIT Commons website](#)
- [General Resources](#)
 - [Getting Started with Collective Platform-an Implementation Guide for Clinics](#)
 - [Sharing Information on the Collective Platform: A Resource Guide for Users](#)
- [Webinars and Best Practices](#)
 - [Overview of Resource Guides](#)



STEP 3: COLLECTIVE SUPPORT TEAM REACHES OUT WITH NEXT STEPS TO ONBOARD THE CLINIC.

Discovery Form

This form is used to determine eligibility for use of the Collective Platform. The three page document has four key sections: 1) Organization Information, 2) Contact Information, 3) Patient Services, Personnel, and Program Information, and 4) Technical Information.

Implementation

Once Data Sharing Agreement is signed by the clinic and Collective Medical, implementation of the Collective Platform can begin.

Data Sharing Agreement

If a clinic decides to move forward, Collective Medical will send a Data Sharing Agreement to the clinic. Clinic signs and returns before any patient rosters can flow to Collective Medical.



Phone Call

After your clinic submits the Discovery Form, Collective Medical will schedule a call with your clinic to review the form together.

Eligibility Files or Patient Rosters

For compliance with HIPAA, all clinics must send monthly (or more frequent) patient eligibility file or 'patient roster' to Collective Medical. This process and sample file layouts will be provided during onboarding discussions.



ELIGIBILITY FILE/PATIENT ROSTER LAYOUT

A full webinar on Best Practices for building Eligibility Files can be found [here](#). You must have access to Collective Community in order to access the webinar.

Eligibility File Layout

- Clinics are required to upload an eligibility file at a minimum of once every 30 days.
- Must be a .csv, .txt (pipe or tab).
- File names must remain consistent.
 - ex: Collective_Medical_01252021.csv (date can vary).
- Column headers, once established, must remain consistent.
 - ex: Date of Birth cannot be changed to DOB.
- Format for all date fields must contain a 4-digit year (2021).
- Column formats must remain consistent throughout the entire column.
 - Ex: can be one character (m/f) or full text (male/female) but not both.
- All members/patients must have a unique ID (MRN) that remains consistent with that member only.
- Leave blank values when information is not available.
 - No Null or N/A
 - No placeholders (ex: DOB 1/1/1900)
- Please include only active patients in file.

Columns Headers for Clinics

• Standard Column Headers (Required)

- Unique Identifier (MRN)
- First and Last Names
- Date of Birth
- Gender
- SSN (if available)
- Address 1
- Address 2 (if applicable)
- City
- State
- Zip
- Phone Number

• Care Team Column Headers (Optional)

- Provider Name
- Provider NPI
- Provider Facility Address
- Provider City
- Provider State
- Provider Zip
- Provider Phone Number
- Provider Taxonomy Code

Full Eligibility File example excel sheet is available for download on Collective Community. [Link here.](#)



ELIGIBILITY FILES/PATIENT ROSTERS: COMMON ISSUES

A full webinar on Best Practices for building Eligibility Files can be found [here](#). You must have access to Collective Community in order to access the webinar.

Most Frequent Issues with Eligibility Files

- Column headers have changed.
- Header rows not consistent.
- Date format change.
 - ex: 1/1/1900 to 1900/1/1
- Group values change.
- File name changes.
- New columns added.
- Not including your full active population.
- Adding SSN as a member ID.
- Not following the correct date format.
 - All dates must be a 4-digit value.
- Phone numbers and SSN containing dashes or nonnumeric values.
- Dropping leading zeros in any numeric value.
- If you add something new, be sure to update Collective Medical so that they can process those changes and recognize the change in your eligibility file.

Automatic Email Confirmation

- Once Collective Platform is implemented, you can request an automatic email confirmation from Collective Support team that confirms files have successfully been received and processed.
 - Example: If you are sending eligibility files on a weekly basis, you will get an email each week that automatically confirms that your file has successfully been uploaded.
- Email support@collectivemedical.com to request this confirmation.

Full Eligibility File example excel sheet is available for download on Collective Community. [Link here.](#)



TERMINOLOGY

Collective Medical: vendor of the Collective Platform and EDIE. Collective Medical is a Salt Lake City-based company that operates the largest real-time care collaboration network in the United States which connects hospitals, emergency departments, skilled nursing facilities, primary care providers, mental and behavioral health clinics, and others to improve patient outcomes by closing the communication gaps that undermine patient care. The Collective Platform assists healthcare organizations and payers to identify at-risk and complex patients and facilitate actionable collaboration to make better care decisions.

Collective Platform: The Collective Platform (formerly known as PreManage) is a web-based platform with two applications. EDIE is the first application. The other application, often generally referred to as the Collective Platform or Collective Ambulatory, is the second application which is used in non-hospital facility types including primary care clinics, behavioral health organizations, CCOs, health plans, and others. Users can only see information on a patient with whom they have an established HIPAA-TPO relationship. This relationship is identified through an **eligibility file (patient roster)** provided by each organization to the Collective Platform. This information provides the ability to rapidly identify at risk patients or members and support them in getting the right care through improved care coordination.

EDIE: Emergency Department Information Exchange. EDIE is one of two applications of the Collective Platform, provided through Collective Medical. EDIE provides hospital facilities key care summaries for patients with high utilization of emergency department services and/or who have been identified to have complex care needs with care guidelines. EDIE queries for hospitals to see if a patient is in the system and meets criteria for a notification. The goal is to reduce unnecessary hospital services and improve outcomes.

OHA, OHLC, and HIT Commons manage the EDIE Utility in Oregon which leverages the Collective Platform.

If you have any other questions or need more information please reach out to:

Collective Medical Support Team
support@collectivemedical.com

HIT Commons
HITInfo@hitcommons.org