



Directed Exchange: Q&A for Providers

What is Directed Exchange?

Directed Exchange is a term used to describe the methods used by a health care provider to securely send patient information to another health care provider, care coordinator, or other stakeholder such as a Health Information Exchange (HIE) Organization. Health care providers and stakeholders who use directed exchange to securely send and receive health information may include clinicians, non-clinical staff, laboratories, public health agencies, local health departments, and registry or quality reporting organizations.

Unlike query-based exchange where a requestor of information is querying another source for information if available, or consumer-mediated exchange where the patient is serving as the intermediary, directed exchange has a specific sender and receiver. There are many methods and approaches to send and receive information securely using directed exchange; these include, but are not limited to:

- **Direct technical standard:** Secure email-based solutions available within certified health information technology (health IT), such as electronic health records (EHRs) and some third-party applications to send and receive encrypted patient information. Learn more about the Direct technical standard at: [Direct Basics: Q&A for Providers](#).
- **Secure messaging applications:** Internet-based solutions such as portals or mobile applications that enable health care providers to securely communicate with each other to send/receive health information. Secure messaging solution for providers may be integrated with or separate from certified health IT functionality that enables secure patient-provider communication.
- **Web-services exchange standards:** Health information can be exchanged using web services that enable secure system-to-system interaction over a network. Web-services enable systems to use existing internet connections to send/receive health information. Web-services may be implemented using secure internet rules to send/receive encrypted health information.
- **Point-to-point interfaces:** Health information can be exchanged using point-to-point interfaces that connect two systems securely over a private network, a virtual private network, or other network protocols that enable two systems to connect via a digital “handshake” for secure health information exchange.
- **Secure Internet collaboration platforms:** Providers give access to authorized third parties to view or add patient information on a secure Internet-based platform. Both parties accessing the platform have their own username/password associated with their accounts. These solutions may focus on document sharing or communications among patients care teams for patient relationship management.

What is the value of using Directed Exchange in healthcare?

During a busy time, most people use technology-based solutions such as email or text, rather than pick up a phone, mail documents, or hand-deliver information. Under the Health Information Portability and Accountability Act ([HIPAA Security Rule](#)), electronic health information exchange must ensure the confidentiality, integrity, and technical safety of patient information. Directed exchange provides multiple approaches to securely send patient information to a designated recipient.

As a provider, you want to communicate quickly and accurately and then get back to the patient at hand, but standard email and texting runs the risk of violating HIPAA policies unless it is encrypted. So, what are



your options today? How can you securely consult with a colleague, be notified of your patient's emergency room or hospital admission, send or receive a referral request, or send patient information for quality or public health reporting?

If you're communicating with another provider – and both of you are using certified health IT, such as electronic health record (EHR) technology, it's likely that your EHRs are connected to a secure-email based service that enables you to send/receive messages, attach information in interoperable formats (e.g., consolidated continuity of care document ([C-CDA](#))) or PDF, electronically manage referrals, or receive automated notifications about your highest priority patients within your EHR.

If you're rotating between multiple clinics or hospitals and using multiple health IT platforms – or do not have a health IT system - you and your colleagues may prefer secure-email based solutions that are not tethered to a particular health IT platform. Direct secure email providers offer solutions that are independent of any health IT technology. Your state, regional, or local HIE organization may also offer Direct secure email addresses for providers.

If you need to communicate across a number of organizations and care teams (such as residents, consulting physicians), you may prefer a secure text messaging service. Because of the inadequacy of standard text messaging to meet HIPAA rules, a number of vendors have created mobile applications that offer care team members the convenience of securely texting each other. There are a number of secure text messaging services that offer mobile applications that physicians can use to communicate with their staff and other providers.

If your state, region, or local health system operates an HIE, you may want to make sure important health information such as encounter summaries, discharge summaries, or immunization information are sent to the HIE, so other providers who may see your patient have access to the most comprehensive health history. As a provider who is connected to an HIE via directed exchange, you may be able to set your notification preferences to receive notifications of hospital admission or discharge for your entire patient panel – or high-priority patients – within your EHR so you receive the information in a timely manner. Receiving patient health information via directed exchange means that you do not have to query for health information or wonder if there is something you should know.

If you're a specialty provider who needs to share patient documents or images with another colleague, secure health information sharing platforms enable storage and sharing of PDF and C-CDA documents, [DICOM](#) (Digital Imaging and Communications in Medicine) images, other images on a secure cloud-based server that can be accessed by members of the patient care team or other authorized users.

Customer relationship management (CRM) solutions tailored for patient relationship management provide CRM for health care. These systems tailored for healthcare are sometimes called "patient relationship management" (PRM) platforms. These solutions, used by health systems, Accountable Care Organizations (ACOs), and care management organizations, enable providers, care managers, and other stakeholders to securely communicate with each other and provide access to shared patient health information.

How do I start using Directed Exchange?

Since there are so many options for directed exchange, what's the best way to get started? Just as you are navigating the right personal communications to use when communicating via email, text, apps-based



messaging platforms, e-faxing, or phone, you have multiple options for directed exchange of health information.

Have a certified EHR or other health IT system? Ask your health IT developer vendor about Direct secure email and whether your system is connected in a way that enables you to connect with other Direct secure email-connected providers. Similar to your personal communications options, you may need to know the Direct email address of your recipient, or your solution may provide a directory of connected providers or organizations.

Don't have an EHR, use multiple systems or are interested in a health IT-agnostic Direct secure email solution? There are a number of Direct secure email vendors that market directly to providers. The costs can be as little as \$10 per month and some even offer the option to integrate a fax line so that all your Direct secure email and fax communications are in one place. Having a Direct secure email can also enable you to communicate securely with patients who have signed up for a Direct email address through patient applications and platforms that provide Direct addresses for patients.

Is there a state, local, or regional HIE that contains health information on your patients? Contact them to understand your options for both sending and receiving information about your patients to the HIE using directed exchange.