Importing and Merging Data for a C-CDA for an Individual Patient

07/24/2024 6:10 pm EDT

You can import a C-CDA (Consolidated Clinical Document Architecture) to a patient's chart. Once uploaded, you can reconcile their medications, problems, and allergies.

1. Go to the patient's chart and select the **Clinical Dashboard.**

2. Scroll down the **Import Structured Clinical Record** section. Click **Choose File** and select the file you would like to import. Click **Preview File** to continue.

3. Selecting **Finalize File** will import the file and you can reconcile data in the patient chart. You can also reconcile the data now by clicking **Finalize & Start Reconciliation**. We will look at finalizing the data and reconciling it later in the chart in this article.

Preview This Document Before Uploading to the Patient Record!

Import Clinical Record:

Transtition of Care	[204980904] 03/10/22 15:15 Laurie Sample: ⌄	
Date	[ ]	Date of document, necessary to put this document in the patient's timeline.
Description	[ ]	Description of document.
Is structured data	☑	If true, is lab result and should be automatically added to patient lab result sets after finalizing. For C-CDA it will import medications, allergies and problems.
Lab result processed	☐	If true, lab has been processed and should not be reprocessed.
Type of document	C-CDA — Consolidated Clinical Document Architect ⌄	Optional Description of document.

[Cancel] [Finalize File] [Finalize File & Start Reconciliation]

Preview Imported Clinical Document

[Re-order sections] [Check for Errors]   [Toggle Preview]

Patient Health Summary

4. Once the data is imported, you can go to the **Problems**, **Medications,** and **Allergies** sections of the patient's chart to merge the data to their chart. Select **Continue Reconciliation** to continue.

Problems

+ Add new patient	
Demographics	
Appointments	
Clinical Dashboard ⚠	
Documents	
Eligibility	
Tasks ⑦	
Problem List ⚠	
Medication List ❗	

Laurie Sample (Female | 31 years old | Dec. 8, 1990) ✎   SAJA000001

Phone: (650) 555-5555   **Email:** sample@sample.com   **Date Added:** Jan. 4, 2022
Address: 328 Gibraltar Dr   **Last Scheduled Appt:** Tue Sep 27, 2022
Sunnyvale , CA 60005   **Next Scheduled Appt:** Thu Sep 29, 2022
CDS: Adult Immunization Schedule Age: 27-49

☑ onpatient access enabled   New Referral   Fax Demographics   🖨 Print Demographics   Apple Health App Data   ♥ Vitals   + Schedule New Appointment

⚠ There are medications that haven't been reconciled for this patient.   Continue Reconciliation

Active Medication Orders   [+ Add Medication] [🖨 Print List]

Medications

+ Add new patient	
Demographics	
Appointments	
Clinical Dashboard ⚠	
Documents	
Eligibility	
Tasks ⑦	
Problem List ⚠	
Medication List ⚠	
Send eRx	

Laurie Sample (Female | 31 years old | Dec. 8, 1990) ✎   SAJA000001

Phone: (650) 555-5555   **Email:** sample@sample.com   **Date Added:** Jan. 4, 2022
Address: 328 Gibraltar Dr   **Last Scheduled Appt:** Tue Sep 27, 2022
Sunnyvale , CA 60005   **Next Scheduled Appt:** Thu Sep 29, 2022
CDS: Adult Immunization Schedule Age: 27-49

☑ onpatient access enabled   New Referral   Fax Demographics   🖨 Print Demographics   Apple Health App Data   ♥ Vitals   + Schedule New Appointment

⚠ There are problems that haven't been reconciled for this patient.   Continue Reconciliation

Active Problems   [+ Add Problem] [🖨 Print List]

☐ Show Inactive Problems   ☐ Patient has No Known Active Problems

Allergies

5. After clicking **Continue Reconciliation**, you will be taken to the Clinical Dashboard. Select **Continue Reconciliation**.

6. You can then reconcile the problems individually by checking the box (

) next to the problem or you can select all of the problems by checking the box at the top of the column. At any point, you can select **Back to Clinical Dashboard** to return to the patient's clinical dashboard.

Click **Confirm** to import the selected problems. Clicking **Preview Finalized Problems** allows you to see a complete list of the patient's problems with both previous and newly added problems.

On the Preview page, you can see the finalized problem list. You can always click **Go Back** to return and add or remove problems. If it is satisfactory, click **Confirm.**

Preview Finalized Problem List

Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
Chronic urinary tract infection (disorder)	ICD-10	N39.0	197928006	Active		07/25/2018	
Idiopathic scoliosis AND/OR kyphoscoliosis (disorder)	ICD-10	M41.20	30611007	Active		07/25/2018	
Multiple environmental allergies (disorder)	ICD-10	T78.49XA	444026000	Active		07/25/2018	
Low back pain	ICD-10	M54.5	279039007	Active		01/25/2022	
Hereditary breast and ovarian cancer syndrome (disorder)	ICD-10	C50.919	254843006	Resolved	07/25/2018	07/25/2018	
Abdominal pregnancy with intrauterine pregnancy	ICD-10	O00.01		Resolved	07/25/2018	07/25/2018	
Bitten by dolphin, initial encounter	ICD-10	W56.01XA		Active		09/23/2022	
Shark bite	ICD-10	W56.41XA	217704005	Active		09/23/2022	
Bitten by turtle, initial encounter	ICD-10	W59.21XA		Active		02/08/2022	

By clicking "Confirm", you are merging patient data to your chart. If you miss something, you can reupload the CCDA file again and make changes.

[Confirm] [Go Back]

Once complete, you will see a success message in the top right-hand corner. You will also see who added the problems to the patient's list in the **Edited by** column.

✓ Reconciliation finalized   Dismiss

Finalized Problem List

Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
Chronic urinary tract infection (disorder)	ICD-10	N39.0	197928006	Active		07/25/2018	
Idiopathic scoliosis AND/OR kyphoscoliosis (disorder)	ICD-10	M41.20	30611007	Active		07/25/2018	
Multiple environmental allergies (disorder)	ICD-10	T78.49XA	444026000	Active		07/25/2018	
Low back pain	ICD-10	M54.5	279039007	Active		01/25/2022	
Hereditary breast and ovarian cancer syndrome (disorder)	ICD-10	C50.919	254843006	Resolved	07/25/2018	07/25/2018	
Abdominal pregnancy with intrauterine pregnancy	ICD-10	O00.01		Resolved	07/25/2018	07/25/2018	
Bitten by dolphin, initial encounter	ICD-10	W56.01XA		Active		09/23/2022	James Smith
Shark bite	ICD-10	W56.41XA	217704005	Active		09/23/2022	James Smith
Bitten by turtle, initial encounter	ICD-10	W59.21XA		Active		02/08/2022	

In order to complete the complete reconciliation, you will need to follow the same process for allergies and medications.

Current Patient Chart - Allergy

Allergy	Reaction	RxNorm Code	Status	Date Changed	Date Created	Edited By
penicillin	Hives	7984	Active		10/13/2021	
Non-Drug Allergy: Cats	Shortness of breath/difficulty breathing		Active		10/13/2021	
Non-Drug Allergy: Milk	Hives		Active		10/13/2021	
d00170 aspirin	Hives	1191	Active		10/13/2021	

C-CDA File - Allergy

	Allergy	Reaction	RxNorm Code	Status	Date Changed	Date Created	Edited By
☑	d00118 sulfADIAZINE	None	10171	Active	09/23/2022	09/23/2022	
☐	penicillin	Hives	7984	Active	10/13/2021	09/23/2022	
☐	d00170 aspirin	Hives	1191	Active	10/13/2021	09/23/2022	

By clicking "Confirm", you are merging patient data to your chart. If you miss something, you can reupload the CCDA file again and make changes.

[Confirm] [Preview Finalized Allergies]

Current Patient Chart - Medication

Medication	SIG	Date	Status	Date Created	Edited By
cyclobenzaprine 10 mg oral tablet	1 a day as needed		Active	11/10/2021	
Flonase 50 mcg/inh nasal spray			Active	10/13/2021	
Cranberry oral capsule			Active	10/13/2021	
12 Hour Nasal		02/21/2013 - 05/20/2013	Active	10/13/2021	
ZyrTEC 5 mg oral tablet, chewable	take 1 tab po qd	03/05/2013 - 04/01/2013	Active	10/13/2021	
Aquaphor	1		Active	02/03/2022	
Aquaphor Ointment mixed with Bacitrain	1		Active	02/03/2022	
indomethacin 2mg/ml, cherry syrup ad 150ml	5ml b.i.d		Active	02/04/2022	
Indomethacin 2mg/ml Cherry Syrup ad 150ml	5ml b.i.d		Active	02/04/2022	
acetaminophen 160 mg oral tablet, disintegrating	1 capsule once a day		Active	02/04/2022	

‹ **1** 2 3 4 ›

C-CDA File - Medication

	Medication	SIG	Date	Status	Date Created	Edited By
☐	None		02/20/2013 - 10/13/2021	Active	09/23/2022	
☐	phentermine 37.5 mg oral capsule		06/09/2014 - 10/01/2014	Active	09/23/2022	
☐	Zofran ODT 8 mg oral tablet, disintegrating		07/02/2014 - 07/22/2014	Active	09/23/2022	
☐			10/02/2014 - 12/31/2014	Active	09/23/2022	
☐	Flonase 50 mcg/inh nasal spray		10/13/2021 - Current	Active	09/23/2022	
☐	Cranberry oral capsule		10/13/2021 - 09/23/2022	Active	09/23/2022	
☐	Avastin 25 mg/mL intravenous solution		10/13/2021 - 10/13/2021	Active	09/23/2022	
☐	CeleBREX 200 mg oral capsule		10/13/2021 - 10/13/2021	Active	09/23/2022	
☐	Keflex 500 mg oral capsule		10/13/2021 - 10/13/2021	Active	09/23/2022	

‹ **1** 2 3 ›

By clicking "Confirm", you are merging patient data to your chart. If you miss something, you can reupload the CCDA file again and make changes.

[Confirm]   Preview Finalized Medications

If you need to return to the reconciliation later, you can exit the process. Just return to the clinical dashboard and select **Continue Reconciliation**.

[+ Add new patient]

Demographics
Appointments
Clinical Dashboard ⚠
Documents
Eligibility
Tasks ①
Problem List ⚠
Medication List ⚠
Send eRx
Allergy List ⚠
Drug Interactions ⑪

Jenny (Jen) Harris (Female | 42 years old | Feb. 11, 1980) ✏   HAJE000001

Phone: (443) 555-5555   **Email:** sample@sample.com   **Date Added:** Oct. 13, 2021
Address: 1001 N Rengstorff Ave   **Last Scheduled Appt:** Fri Sep 23, 2022
Mountain View , CA 94040   **Next Scheduled Appt:** Fri Sep 23, 2022
CDS: Adult Immunization Schedule Age: 27-49

[New Referral] [Fax Demographics] [🖨 Print Demographics]   [Apple Health App Data] [♥ Vitals] [+ Schedule New Appointment]
[Referral Note ▾] [Clinical Summary ▾]

Clinical Reconciliation

Date	Problem	Medication	Allergy	Action
09/23/2022	Unfinished	Unfinished	Unfinished	➤ Continue Reconciliation

Once the problems, medications, and allergies have all been finalized, you're all set.

✅

All patient data (09/23/2022) has been merged to the patient chart successfully!

[Back to Clinical Dashboard]

✅ **Reconciliation finalized**   Dismiss