

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**.

The screenshot shows the 'Clinical Dashboard' interface. On the left is a sidebar with a menu including 'Demographics', 'Appointments', 'Clinical Dashboard' (highlighted with a green box and an arrow), 'Documents', 'Eligibility', 'Tasks', 'Problem List', 'Medication List', 'Send eRx', 'Allergy List', 'Drug Interactions', 'CQMs', 'Intake Data', 'Lab Orders', 'Immunizations', 'Growth Charts', 'onPatient Access', 'Education Resources', and 'Communication'. The main content area is titled 'Summary Of Care Provided' and contains several sections: 'Appointment' (table with columns: Appointment, Summary of Care, Summary of Care requested and not available, Type), 'Ongoing Problems' (table with columns: Problem, ICD-10-CM, ICD-9-CM, SNOMED, Diagnosis Date, Status, Notes), 'Active Allergies' (table with columns: Medication, Reaction, RxNorm Code, Notes), 'Active Medications' (table with columns: Medication, RxNorm, Strength, SIG, SIG Note, Dispense, Refills, Order Status, Date), 'Lab Results' (table with columns: Status, Date, Documents), and 'Legacy Lab Results' (table with columns: LOINC Code, Lab Description, Date, Sign-Off, Status, Result, Comments). Each section has a message indicating no information has been recorded for this patient.

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.

The screenshot shows the 'Import Structured Clinical Record' section. It features a form with the following elements: 'Type of record:' with a dropdown menu showing 'C-CDA - Consolidated Clinical Document Architect'; 'File to upload (*.xml):' with a 'Choose File' button and the filename 'HUMA000001.xml'; and a 'Preview File' button.

Additional Options:

[Care Plan](#) | [Care Team Members](#) | [Functional Status](#) | [Mental Status](#) | [Create Syndromic HL7 Message for CDC](#) | [Import CCR Lab Result](#) | [Social Data](#) |

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:

Transition 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.


Preview Imported Clinical Document

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

- 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 Sunnyvale, CA 60005 Last Scheduled Appt: Tue Sep 27, 2022
Next Scheduled Appt: Thu Sep 29, 2022
CDS: [Adult Immunization Schedule Age: 27-49](#)


onpatient access enabled

! There are medications that haven't been reconciled for this patient.

Active Medication Orders

Medications

- Demographics
- Appointments
- Clinical Dashboard !
- Documents
- Eligibility
- Tasks 7
- Problem List !
- Medication List !
- Send eRx

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onpatient access enabled

! There are problems that haven't been reconciled for this patient.

Active Problems

Show Inactive Problems Patient has No Known Active Problems

Allergies

+ Add new patient

Demographics

Appointments

Clinical Dashboard !

Documents

Eligibility

Tasks 1

Problem List !

Medication List !

Send eRx

Allergy List !

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
Mountain View, CA 94040 **Last Scheduled Appt:** Tue Sep 27, 2022

CDS: Adult Immunization Schedule Age: 27-49 **Next Scheduled Appt:** Tue Sep 27, 2022

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⚠ There are allergies that haven't been reconciled for this patient. [Continue Reconciliation](#)

Current Allergy List [+ Add Allergy](#) [Print List](#)

| Allergy | Reaction | RxNorm Code | Status | Notes | Updated | Edit | Delete |
|------------|----------|-------------|--------|-----------------------------|--------------|----------------------|------------------------|
| penicillin | Hives | 7984 | active | Was allergic since a child. | Oct 13, 2021 | | |

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

+ Add new patient

Demographics

Appointments

Clinical Dashboard ! ←

Documents

Eligibility

Tasks 1

Problem List !

Medication List !

Send eRx

Allergy List !

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

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[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 |
|------------|--|--|--|--|
| 09/26/2022 | Unfinished | Unfinished | Unfinished | → 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.

[Back to Clinical Dashboard](#) → **Back to Clinical Dashboard**

Problem **Allergy** **Medication**

Current Patient Chart - Problem

| 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 turtle, initial encounter | ICD-10 | W59.21XA | | Active | | 02/08/2022 | |

C-CDA File - Problem

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

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 Problems](#) → **Preview Finalized 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**.

[Back to Clinical Dashboard](#)

- Problem
- Allergy
- Medication

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 | |
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| 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.

[Back to Clinical Dashboard](#)

- Problem
- Allergy
- Medication

✔ 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.

[Back to Clinical Dashboard](#)

- Problem
- Allergy
- Medication

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

| <input type="checkbox"/> | Allergy | Reaction | RxNorm Code | Status | Date Changed | Date Created | Edited By |
|-------------------------------------|---------------------|----------|-------------|--------|--------------|--------------|-----------|
| <input checked="" type="checkbox"/> | d00118 sulfADIAZINE | None | 10171 | Active | 09/23/2022 | 09/23/2022 | |
| <input type="checkbox"/> | penicillin | Hives | 7984 | Active | 10/13/2021 | 09/23/2022 | |
| <input type="checkbox"/> | 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

[Back to Clinical Dashboard](#)

- Problem
- Allergy
- Medication

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 Bacitracin | 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

| <input type="checkbox"/> | Medication | SIG | Date | Status | Date Created | Edited By |
|--------------------------|---|-----|-------------------------|--------|--------------|-----------|
| <input type="checkbox"/> | None | | 02/20/2013 - 10/13/2021 | Active | 09/23/2022 | |
| <input type="checkbox"/> | phenertamine 37.5 mg oral capsule | | 06/09/2014 - 10/01/2014 | Active | 09/23/2022 | |
| <input type="checkbox"/> | Zofran ODT 8 mg oral tablet, disintegrating | | 07/02/2014 - 07/22/2014 | Active | 09/23/2022 | |
| <input type="checkbox"/> | | | 10/02/2014 - 12/31/2014 | Active | 09/23/2022 | |
| <input type="checkbox"/> | Flonase 50 mcg/inh nasal spray | | 10/13/2021 - Current | Active | 09/23/2022 | |
| <input type="checkbox"/> | Cranberry oral capsule | | 10/13/2021 - 09/23/2022 | Active | 09/23/2022 | |
| <input type="checkbox"/> | Avastin 25 mg/ml, intravenous solution | | 10/13/2021 - 10/13/2021 | Active | 09/23/2022 | |
| <input type="checkbox"/> | CeleBREX 200 mg oral capsule | | 10/13/2021 - 10/13/2021 | Active | 09/23/2022 | |
| <input type="checkbox"/> | 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
- Problem List
- Medication List
- Send eRx
- Allergy List
- Drug Interactions

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

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[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.



Reconciliation finalized [Dismiss](#)

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

[Back to Clinical Dashboard](#)