

Exporting an Individual Patient's CCDA File

07/24/2024 2:35 pm EDT

You can export or download a single patient's CCDA file from their chart. You can also share it with your patient through OnPatient. For more information on how the data in the CCDA is populated, see our article [here](#).


1. Navigate to the patient's chart and select **Clinical Dashboard** from the options on the left.

The screenshot shows a patient's chart page. On the left is a navigation menu with options: Demographics, Appointments, Clinical Dashboard (highlighted with a red arrow), Documents, Tasks (3), Problem List (2), Medication List (4), Send eRx, Allergy List (0), Drug Interactions (0), CQMs, and Intake Data. The main content area displays patient information for 'drchrono Test', a 40-year-old female born Feb. 7, 1984. It includes fields for Chart ID (LETA000001), Phone ((443) 555-5555), Email (Missing), and Address (1234 One Two Rd, Energy, DE 11121). It also lists the Primary Provider (Donna John), Date Added (Feb. 7, 2018), Last Scheduled Appt (Jun. 10, 2024), and Next Scheduled Appt (Jun. 13, 2024). There are buttons for 'New Appointment', 'New Referral', and 'Apple Health App Data'. Below this is a 'CDS' section with tags like 'Mammogram screening for all women aged 40-74' and 'Patient must have documented allergies'. A 'Flags' section shows 'VIP Celebrity'. At the bottom right are 'Referral Note' and 'Clinical Summary' dropdown menus.

2. Under the **Clinical Summary** dropdown, there are options to download, share, and export the CCDA file.

This screenshot is similar to the previous one but shows the 'Clinical Summary' dropdown menu open. The menu options are: 'Download PDF (will appear in Message Center)', 'Download C-CDA XML', 'Display C-CDA XML', and 'Customize Clinical Summary (XML or PDF)'. At the bottom of the menu, it says 'Last generated at Feb. 24, 2022, 2:45 p.m.'.

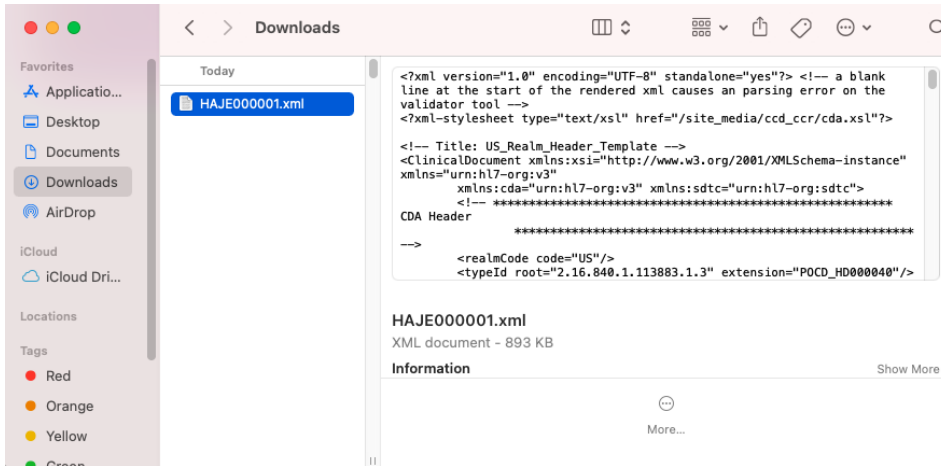
3. Select the option that best fits your needs.

- **Download PDF** will send the file to the **Message Center** () for you to view, download or print.

Incoming Messages ?

<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	☆ drchronos	Generated PDF: HAJE000001.pdf					April 21, 2021, 9:32 a.m.	April 21, 2021, 9:32 a.m.

- Download C-CDA XML will download the file to your computer.



- Display C-CDA XML shows the file in a web-viewable format similar to the PDF option.

Patient Health Summary

Patient	Jenny Harris		
Date of birth	February 11, 1980	Sex	Female
Race	White Unknown	Ethnicity	Not Hispanic or Latino
Contact info	Primary Home: 1001 N Rengstorff Ave Mountain View, CA 94040, US Tel (Primary Home): (844) 569-8628 Tel (Cell): (443) 555-5555	Preferred Language	English (en)
		Patient IDs	HAJE000001 2.16.840.1.113883.3.7621 111-11-1111 2.16.840.1.113883.4.1
Document Created	April 21, 2021, 09:41:21, EST		
Care provision	from November 3, 2020, 15:36:04, EST to April 21, 2021, 09:41:21, EST		
Performer (primary care provider)	James Smith		
Author	James Smith		
Contact info	225 Schilling Circle Hunt Valley, MD 21031, US Tel (Work Place): (443) 555-5555		
Document maintained by			
Contact info	Work Place: 225 Schilling Circle Hunt Valley, MD 21031, US Tel (Work Place): (443) 555-5555		

Table of Contents

- Allergies, Adverse Reactions, Alerts
- Encounters
- Family History
- Immunizations
- Instructions
- Medications Administered
- Medications
- Plan of Care
- Problems
- Procedures
- Lab Tests
- Results
- Social History
- Vital Signs

Show all sections

- **Customize Clinical Summary** allows you to select which data elements you would like to include in the summary. You can export it as an XML or PDF file.

Customize Your Clinical Summary

Select Which Data Elements To Include in Clinical Summary:

<input checked="" type="checkbox"/>	Data To Include in Clinical Summary
<input checked="" type="checkbox"/>	Patient name:
<input checked="" type="checkbox"/>	Sex:
<input checked="" type="checkbox"/>	Birthdate:
<input checked="" type="checkbox"/>	Race:
<input checked="" type="checkbox"/>	Ethnicity:
<input checked="" type="checkbox"/>	Preferred language:
<input checked="" type="checkbox"/>	Smoking status:
<input checked="" type="checkbox"/>	Problems:
<input checked="" type="checkbox"/>	Medications:
<input checked="" type="checkbox"/>	Allergies:
<input checked="" type="checkbox"/>	Lab tests:
<input checked="" type="checkbox"/>	Vitals:
<input checked="" type="checkbox"/>	Care plan:
<input checked="" type="checkbox"/>	Procedures:
<input checked="" type="checkbox"/>	Immunizations:
<input checked="" type="checkbox"/>	Past appointments:
<input checked="" type="checkbox"/>	Future appointments:

Create CCDA .xml

Create PDF

- **Send to OnPatient (if enabled)** will send the CCDA file in a PDF format for the patient to download from their messages after logging in to their OnPatient account.

Referral Note ▾

Clinical Summary ▾

- Download PDF (will appear in Message Center)
- Download C-CDA XML
- Display C-CDA XML
- Customize Clinical Summary (XML or PDF)
- Send to Onpatient**

Last generated at June 11, 2024, 10:34 a.m.

onpatient Appointments Doctors Billing Messages **1** Documents Health Profile Jenny Harris

Messaging Send Message

Inbox **1**

Starred

Sent

Archived

James Smith
Clinical Summary
1 minute ago Reply

Jenny (Jen) Harris's clinical summary created at 2021-04-21 10:01:15.130111 by Brendan Wilberton

Attachments: [Clinical Summary](#)