

What data is included in CCDA exports from DrChrono?

07/24/2024 10:42 pm EDT

You can export patient data in CCDA format in **bulk**, and download or view it **individually**. The data is formatted in XML format. It can also be viewed as a PDF when you export it individually.

Two easy ways of viewing what is included in a CCDA export are in the patient's chart under the **Clinical Dashboard** section. You can select **Download PDF** or **Display C-CDA XML**.

The screenshot shows the DrChrono patient chart for Jenny (Jen) Harris. The 'Clinical Dashboard' is selected in the left sidebar. In the main content area, there are buttons for 'New Appointment', 'New Referral', and 'Apple Health App Data'. Below the patient information, there are buttons for 'Referral Note' and 'Clinical Summary'. A dropdown menu is open under 'Clinical Summary', showing options: 'Download PDF (will appear in Message Center)', 'Download C-CDA XML', 'Display C-CDA XML', 'Customize Clinical Summary (XML or PDF)', and 'Send to Onpatient'.

The **Patient Health Summary** contains the demographic information of the patient as well as the provider, care team members (performer), and practice information. For more information on adding care team members, see our article [here](#).

Patient Health Summary

Patient	Laurie Test Sample		
Patient Previous Name	Laurie Test Patient		
Date of birth	December 8, 1990	Sex	Female
Race	American Indian or Alaska Native Asian Apache Sioux Korean	Ethnicity	Not Hispanic or Latino
Contact info	Primary Home: 123 Fake St Baltimore, MD 21212, US Tel (Cell): +1 650-555-5555 Mail: sample@sample.com	Previous Address	Home: 328 Gibraltar Dr Sunnyvale, CA 60005, US
Preferred Language	English (en)		
Patient IDs	100103542 2.16.840.1.113883.3.7621 appointment_204685548 2.16.840.1.113883.3.7621 111-22-1111 2.16.840.1.113883.4.1		
Document Created	December 12, 2022, 11:20:47, EST		
Care provision	from January 4, 2022, 09:37:00, EST to December 12, 2022, 11:20:47, EST		
Performer	Dr. James Smith		
Author	Jane Smith		
Author	Jane Smith, Office 2		
Contact info	123 Fake Street Baltimore, MD 12345, US Tel (Work Place): (410) 555-5555		
Author	None None,		
Contact info			
Document maintained by			
Contact info	Work Place: 225 Schilling Circle Hunt Valley, MD 21031, US Tel (Work Place): 410-555-5555		

The **Table of Contents** is a good way to see the data included in the CCDA file. This information is pulled from the patient chart and clinical documentation. While in the PDF and Display C-CDA XML views, you can click on any section in the Table of Contents to jump to that section.

Table of Contents

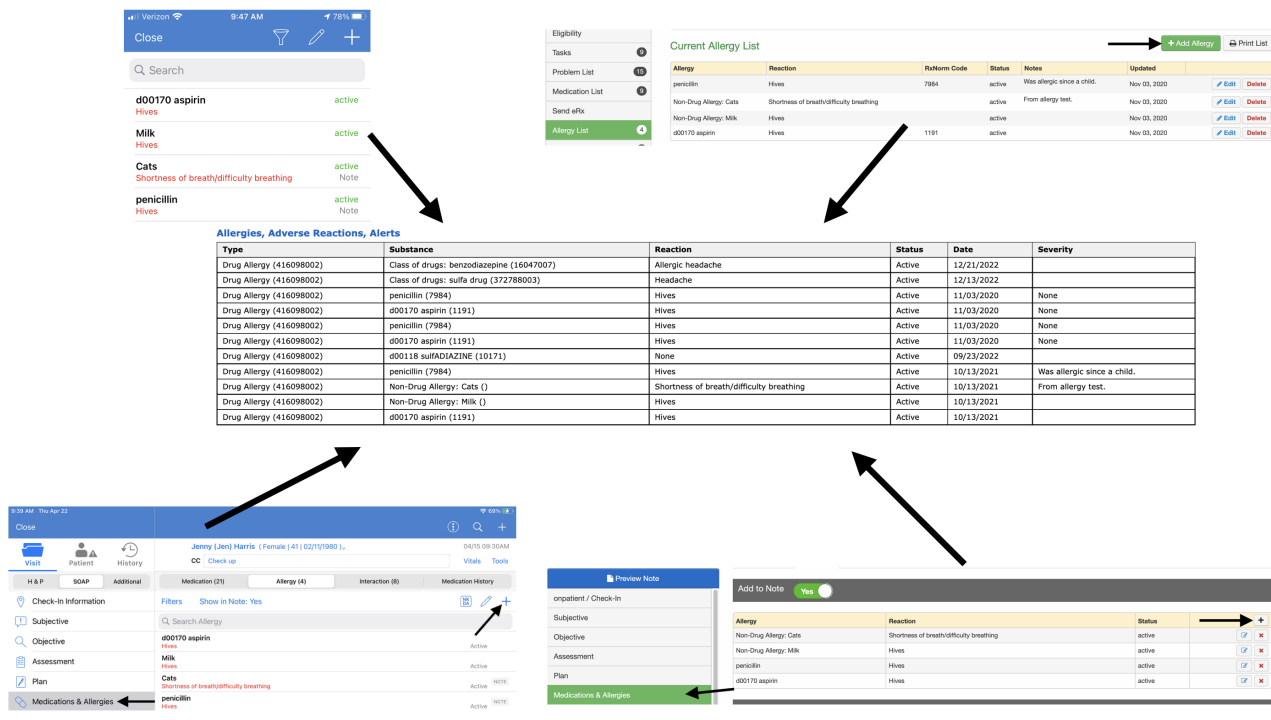
- Allergies, Adverse Reactions, Alerts
- Encounters
- Family History
- Functional Status
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- Immunizations
- Instructions
- Medical Equipment
- Medications Administered
- Medications
- Insurance Providers
- Assessments
- Plan of Care
- Health Concerns Section
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- Problems
- Procedures
- Lab Test Results
- Social History
- Vital Signs

Allergies, Adverse Reactions

Allergies, Adverse Reactions, Alerts

Type	Substance	Reaction	Status	Date	Severity
Drug Allergy (416098002)	Class of drugs: benzodiazepine (16047007)	Allergic headache	Active	12/21/2022	
Drug Allergy (416098002)	Class of drugs: sulfa drug (372788003)	Headache	Active	12/13/2022	
Drug Allergy (416098002)	penicillin (7984)	Hives	Active	11/03/2020	None
Drug Allergy (416098002)	d00170 aspirin (1191)	Hives	Active	11/03/2020	None
Drug Allergy (416098002)	penicillin (7984)	Hives	Active	11/03/2020	None
Drug Allergy (416098002)	d00170 aspirin (1191)	Hives	Active	11/03/2020	None
Drug Allergy (416098002)	d00118 sulfADIAZINE (10171)	None	Active	09/23/2022	
Drug Allergy (416098002)	penicillin (7984)	Hives	Active	10/13/2021	Was allergic since a child.
Drug Allergy (416098002)	Non-Drug Allergy: Cats ()	Shortness of breath/difficulty breathing	Active	10/13/2021	From allergy test.
Drug Allergy (416098002)	Non-Drug Allergy: Milk ()	Hives	Active	10/13/2021	
Drug Allergy (416098002)	d00170 aspirin (1191)	Hives	Active	10/13/2021	

Allergy data can be entered on the web: in the patient's chart, in the clinical note, or through the iPad or iPhone EHR app.



Encounters

The encounter data includes:

- Date of service and appointment time
- Location
- Provider
- Care team members (see our article on adding care team members [here](#))
- Reason for visit
- Encounter type

Encounters

Jan. 5, 2022, 11 a.m. Encounter

Provider: Dr. James Smith - Family Practitioner at Office 1 (225 Schilling Circle Hunt Valley, MD 21031, (443) 555-5555)

Care Team Member: Office Manager - Nick Riviera
Custom - Dr. James Smith
Office Manager - Sample Staff

Reason for visit: Physical Exam

Encounter type: OFFICE O/P EST LOW 20-29 MIN

Encounter Status: Complete

Appointment | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type: Appointment Video Visit Walk-in Transition of Care Referral

Patient Statement Balance: \$410.00 Generate Statement Primary Insurance: United HealthCare [87726]
Secondary Insurance: PAI California Secondary [PAI02] Fall Risk:

Provider: Dr. James Smith
Patient: Laurie T. Sample - 12/08/1990
Reason: Physical Exam
Scheduled: 01/05/2022 Time 11:00AM
Duration: 30 minutes Allow overlapping
Notes:
Consent Forms: HIPAA Data Use Agreement (default) Telehealth Consent (default) No Show Policy (default)

Supervising: - If different to provider -
Office: Office 1
Profile: Physical Exam
Exam: Exam 1
Color:
Status: Complete
0h 13m
View Clinical Note
View All Appointments

CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)
1 99213	OFFICE O/P EST LOW 20-29 MIN	175.00

Modifiers: --- --- --- ---
Quantity/Minutes: 1.00
Diagnosis Pointers: 1:0:0

Note: The encounter data can be entered in various places in DrChrono on the web or EHR app.

Family History

Family History information can be entered into the patient's chart on the web. Navigate to **Family History** on the left-side menu. Select **+Add Family Member**. Once the family member is added, select **+Add Observation** to enter the data.

The screenshot shows the Family History section of a patient's chart. On the left is a navigation menu with 'Family History' highlighted. The main area contains a table with columns: Name, Relation, Race, Ethnic Group, Status, and Action. A family member 'Test Tester' (Father) is listed. Below this is an observation table with columns: Age, Observation, and SnoMED Concept ID. An observation for 'Moderate major depression' (SnoMED Concept ID 832007) is shown. A dropdown menu is open over the observation, showing options: Edit, + Add Observation, and Delete. Red arrows and numbers 1-4 indicate key UI elements.

Functional Status

Functional status assessments can be entered in the patient's chart by scrolling down to the **Functional Status** section under the **Clinical Dashboard** tab.

Functional Status	
Functional Assessment	Date
Tired all the time	2022-12-21

Additional Options:

Care Plan | Care Team Members | **Functional Status** | Mental Status

Previous Functional Statuses

Functional Status Observation (Snomed Code)	Effective Date
Tired all the time (224960004)	Dec. 20, 2022

Functional Status

Functional Status observation

Observation date

[Add functional status](#)

Mental Status

Mental status assessments can be entered in the patient's chart by scrolling down to the **Mental Status** section under the **Clinical Dashboard** tab.

Mental Status

Cognitive Assessment	Date
Depression worse in morning	2022-12-21

Additional Options:

Care Plan | Care Team Members | Functional Status | **Mental Status** |

Previous Mental Statuses

Mental Status Observation (SNomed Code)	Effective Date
Depression worse in morning (247801000)	Dec. 20, 2022

Mental Status

Mental Status observation

Effective date

[Add mental status](#)

Immunizations

Immunization data can be entered into the patient's chart by navigating to the Immunizations tab on the left-side menu. For information on entering immunizations see our article [here](#).

Tasks 0

- Problem List 3
- Medication List 5
- Send eRx
- Allergy List 4
- Drug Interactions 1
- CQMs
- Intake Data
- Lab Orders
- Immunizations**

Download HL7 Immunization Record | Print Immunization Record

Immunizations [Jump to](#)

Step 1: Select Vaccines | [Step 2: Review and Sign](#) | [Step 3: Record Vaccinations](#)

Step 1. Select Vaccines

Birth - 2 years | 2 - 18 years | Adult | Other

Show Inactive | Show Latest Records | [History & Forecast](#)

Schedule	Vaccine	Cvx Code	Consent Form	VIS	Administered On	Administered By	Registry Sync	Status
Birth	HepB	<input type="text"/>						Refuse
1 - 4 Months	UseP	<input type="text"/>						

Instructions

Instructions information can be entered in the **Clinical Dashboard** of the patient chart. Scroll down to **Care Plan** under the **Additional Options** section. When entering the instruction details, select **Patient Clinical Instructions** from the **Plan Type** menu.

Instructions

	Directive
Clinical Instruction	Oral Hygiene Instructions

+ Add new patient

- Demographics
- Appointments
- Clinical Dashboard**
- Documents

Additional Options:

- Care Plan | Care Team Members | Functional Status | Mental Status | Create Syndromic HL7 Message for CDC | Import CCR Lab Result | Social Data |

Entire Care Plan

Type	Plan	Instructions	SNOMED Code	Scheduled	
Goal	Home Care Plan	Test Care plan	100830013 (Home care of patient)	Jan. 27, 2021	Edit
Patient education	Cancer Education	Cancer Education Materials	243072006 (243072006)	April 22, 2021	Edit
Patient clinical instruction	Oral Hygiene Instructions	Oral Hygiene Instructions	58707002 (58707002)	April 22, 2021	Edit

New Care Plan Item

Instructions

Plan type

- ✓ Goal
- Patient education
- Patient decision aid
- Patient clinical instruction**
- Referral to other doctor
- Health Concerns

Scheduled date

Snomed code

Title

Save Care Plan

Medical Equipment

Medical Equipment information can be entered into the patient's chart on the web under the **Implantable Devices** section. Click **Add Implantable Device**, enter the device information, and **Save**.

Medical Equipment

Implanted	UDI	Assigning Authority
Polyester suture, non-bioabsorbable, multifilament	(01)10884521062856(11)141231(17)150707(10)A213B1(21)1234	FDA

Implantable Devices

Unique Device Identifiers	Company Name	Brand Name	GMDN PT Name	SNOMED CT Name	SNOMED Identifier	Version or Model	Lot/Batch	Serial Number	Expiration	Manufacture	HCT/P	MRI	Labeling does not contain MRI Safety	Information
(01)10884521062856(11)141231(17)150707(10)A213B1(21)1234	Covidien L	Ti-Cron	Polyester suture, non-bioabsorbable, multifilament		88863380-82	true	1234		2015-07-07	2014-12-31	false		Labeling does not contain MRI Safety Information	

Active Inactive Archived

Add Implantable Device

Create Implantable Device

Unique Device Identifiers: [Check UDI](#)

Company Name:

Brand Name:

GMDN PT Name:

SNOMED CT Name:

Implantable Devices

Medications Administered

Medications Administered data can be entered on the web or EHR app by selecting **Administered During Visit** from the **Order Status** dropdown menu when entering or editing medication info.

Medications Administered

RxNorm Code	Type	Medication	SIG	Status	Date Started
308192	Medication	amoxicillin 500 mg oral tablet	1 tab 2x a day 1 tab 2x a day	Active	04/22/2021+

Edit Medication

Dispense quantity: 20,000
 Dispense package: 1
 Number refills:
 DAW:
 Pharmacy note: 1st dose taken during visit
 Notes:
 Status of Order:
 Administered during visit
 Electronic eRx Sent
 Phoned into Pharmacy
 Faxed to Pharmacy
 Paper Rx

Tasks

Problem List

Medication List

Send eRx

Allergy List

Drug Interactions

CQMs

Intake Data

Lab Orders

Active Medication Orders

+ Add Medication Print List

Medication	Rxnorm	Dispense	Refills	SIG	Order Status	Date 1	Updated
<input type="checkbox"/> amoxicillin 500 mg oral tablet	308192	20,000		1 tab 2x a day	Administered during visit	04/22/2021+	04/22/2021
<input type="checkbox"/> amoxicillin 500 mg oral tablet	308192	1,000	1		Prescription Printed	04/16/2021+	04/16/2021
<input type="checkbox"/> amoxicillin 500 mg oral capsule	308191	1,000	1		Prescription Printed	04/16/2021+	04/16/2021
<input type="checkbox"/> aspirin 81 mg oral tablet, chewable	318272	100,000	1	1 a day	Prescribed by other Dr	02/17/2021+	02/17/2021
<input type="checkbox"/> amoxicillin 250 mg oral capsule	308182	20,000	2	2 a day	Prescription Printed	01/14/2021+	01/14/2021
<input type="checkbox"/> Cranberry oral capsule	667448					11/03/2020+	11/03/2020
<input type="checkbox"/> Flonase 50 mcg/inh nasal spray	1797933					11/03/2020+	11/03/2020
<input type="checkbox"/> Mirna 52 mg intrauterine device	807283					11/03/2020+	11/03/2020
<input type="checkbox"/> Zyrtec 5 mg oral tablet, chewable		30,000	2	take 1 tab po qd	Electronic eRx Sent	03/05/2020 - 12/01/2020	11/09/2020
<input type="checkbox"/> 12 Hour Nasal	1000990	20,000			Electronic eRx Sent	02/21/2013 - 05/20/2013	11/03/2020

Medications Edit Medication

phentermine 375 mg oral capsule

Free Text SIG:
 Dispense: 0 Refills: 0 DAW:
 Note to Pharmacy:
 Ordered
 Administered during visit
 Electronic eRx Sent
 Phoned into Pharmacy
 Faxed to Pharmacy
 Paper Rx
 Start Date: 06/09/2014 PRN:
 Order Status: Administered during visit Status:
 Internal Notes:

aspirin 81 mg oral tablet, chewable

Free Text SIG:
 Dispense: 1 a day Refills: 0 DAW:
 Ordered
 Administered during visit
 Electronic eRx Sent
 Phoned into Pharmacy
 Faxed to Pharmacy
 Paper Rx
 PRN:
 Status:
 Internal Notes:

Medications

Medication data can be entered in multiple areas and ways:

- Entered medication manually in the patient's chart or clinical note on the web or EHR app
- Data sync with SureScripts or
- Reconciliation data with a CCDA import
- Sending a prescription through the send eRx feature on the web or EHR app

New Prescription

Medication:
 Type: Medication Compound Supply
 Medication:
 SIG:
 Effective Date:
 Dispense: Dispense Unit: DAW: Refills:
 Add to Favorites Add to Medication List
 Notes to Pharmacist:
 * Please do not enter SIG, Effective Date, Drug Name, Strength, Quantity or Dispense Unit in this field.

Active Meds

Medication Name:
 Free Text SIG:
 Dispense: Unit: Refills: Effective Date:
 Dispense as Written:
 Note to Pharmacy:

Medications

Interactions (8) Allergies (4)

Medications

RxNorm Code	Route	Frequency	Dose	Medication	SIG	Status	Date Started	Eprescribed
308191	None	None	None	amoxicillin 500 mg oral capsule	1 1	Active	04/16/2021+	No
807283	None	None	None	Mirna 52 mg intrauterine device		Active	11/03/2020+	No
1797933	None	None	None	Flonase 50 mcg/inh nasal spray		Active	11/03/2020+	No
667448	None	None	None	Cranberry oral capsule		Active	11/03/2020+	No
1000990	None	None	None	Unknown Dosage		Active	02/21/2013 - 05/20/2013	No
1657068	None	None	None	Avastin 25 mg/mL intravenous solution		Active	11/03/2020 - 11/03/2020	No
213469	None	None	None	CeleBREX 200 mg oral capsule		Active	11/03/2020 - 11/03/2020	No
212339	None	None	None	Keflex 500 mg oral capsule		Active	11/03/2020 - 11/03/2020	No
198365	None	None	None	prochlorperazine 10 mg oral tablet		Active	11/03/2020 - 11/03/2020	No

amoxicillin 500 mg oral tablet
 1 tab 2x a day
 Indication:
 Started: 04/22/2021
 Prescribed: 04/22/2021
 Note: 1st dose taken during visit

Eligibility

Tasks

Problem List

Medication List

Send eRx

Active Medication Orders

+ Add Medication Print List

Medication	Rxnorm	Dispense	Refills	SIG	Order Status	Date 1	Updated
<input type="checkbox"/> amoxicillin 500 mg oral tablet	308192	20,000		1 tab 2x a day	Administered during visit	04/22/2021+	04/22/2021
<input type="checkbox"/> amoxicillin 500 mg oral tablet	308192	1,000	1		Prescription Printed	04/16/2021+	04/16/2021
<input type="checkbox"/> amoxicillin 500 mg oral capsule	308191	1,000	1		Prescription Printed	04/16/2021+	04/16/2021
<input type="checkbox"/> aspirin 81 mg oral tablet, chewable	318272	100,000	1	1 a day	Prescribed by other Dr	02/17/2021+	02/17/2021

Insurance Providers

The Insurance Providers section is populated by the primary and secondary insurance information in the patient's chart.

Insurance Providers

Payer name	Policy type / Coverage type	Policy ID	Covered party ID	Policy Holder
United HealthCare		ABC123	123456789	Self
PAI California Secondary		123456789	10987654321	Self

Important Demographics Insurances Authorizations Smoking Status Flags Balance onpatient Payments Important Demographics Insurances Authorizations Smoking Status Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance. ✗ Fall Risk

Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt

Primary Insurance [Save to Insurance History](#) [Patient Insurance History](#)

Subscriber is the Patient Insured person is the same person as the Patient

Insurance Company: United HealthCare *contact support if you can't find an insurance company.
 PO Box 740800, Atlanta, GA 30374-0800

Carrier Payer ID: 87726

TPL Code: *If the Medicaid is Secondary

Insurance ID Number: 123456789

Insurance group name: DrChrono Group *if available

Insurance group number: ABC123 *if available

Insurance plan name: Group Name *if available

Insurance plan type: Other Non-Federal Programs *if available

Insurance claim office number: *if available

Number visits allowed per year: *if available

Card issued date: *Required for checking eligibility of CA Medicaid

Primary Insurance Notes:

Secondary Insurance [Save to Insurance History](#) [Patient Insurance History](#)

Subscriber is the Patient Insured person is the same person as the Patient

Insurance Company: PAI California Secondary

Carrier Payer ID: PAI02 *printed on back of insurance card

Insurance ID Number: 10987654321

Insurance Group Name: Secondary Insurance *if available

Insurance Group #: 123456789 *if available

Insurance plan name: Secondary Insurance Example *if available

Insurance plan type: Commercial Insurance Co. *if available

Insurance claim office number: *if available

Secondary insurance type code: *required for Medicare plans only

Card issued date: *Required for checking eligibility of CA Medicaid

Secondary Insurance Notes:

Insurance Photo Front: No file chosen

Insurance Photo Back: No file chosen

Assessments

The Assessments section contains any information that is entered into the assessment section of the H&P or SOAP forms. This information can be entered on the web version or through the EHR app for iPad or iPhone.

Assessments

Name	Date
Enter your H and P assessment comments here. Laurie T. Sample's exam was normal. Enter your SOAP Assessment comments here. Laurie T. Sample's exam was normal.	12/20/2022

Assessment

Plan

Billing

Billing ICD10 Problems Billing ICD9 Problem History **Assessments**

Assessment

Enter your H&P assessment comments here. Laurie T. Sample's exam was normal.

Assessment

Plan

Medications & Allergies

Billing

Yes No Include in Note *Add to note" must be checked for this to render.

Billing ICD10 Problems Billing ICD9 Problem History **Assessments**

Assessment

Enter your SOAP Assessment comments here. Laurie T. Sample's exam was normal.

Plan of Care

Plan of care is populated by care plan data entered in the patient's chart by scrolling down to the **Care Plan** section under the **Clinical Dashboard** tab.

Additional Options:

-  [Care Plan](#) | [Care Team Members](#) | [Functional Status](#) | [Mental Status](#) |

The Plan of Care includes:

- Patient Education
- Patient Instructions
- Pending lab tests
- Diagnostic Imaging Report (See below for further information)
- Future Appointments
- Referrals

Plan of Care

Plan Type	Description	Planned Date
Patient clinical instruction	Oral Hygiene Instructions (97556010) Follow instructions for oral hygiene.	March 24, 2022
Patient education	Wound Treatment Education (26288018) See handouts for wound care information.	Dec. 20, 2022
HEPATIC FUNCTION PANEL	Not Sent	11/11/2022
CBC (H/H, RBC, INDICES, WBC, PLT)	Not Sent	11/11/2022
VALPROIC ACID	Not Sent	11/11/2022
TSH	Not Sent	12/08/2022

Test Code	Code System	Name	Comments	Date
70373	LOINC	Contrast X-ray of larynx	X-ray Spex	April 29, 2022

Reason	Provider	Location	Planned Date
Back Adjustment	Dr. James Smith, tel:(443) 555-5555	225 Schilling Circle Hunt Valley, MD 21031	Dec. 23, 2022
Please see a specialist.	None None None, tel:None	None, None, None, None, None	April 7, 2022
Please see Dr. Talk for group therapy.	None None None, tel:None	None, None, None, None, None	April 11, 2022

Entire Care Plan

Type	Plan	Instructions	SNOMED Code	Scheduled
Patient clinical instruction	Oral Hygiene Instructions	Follow instructions for oral hygiene.	97556010 (Oral hygiene instruction)	March 24, 2022 Edit
Referral to other doctor	Referral to Specialist	Please see a specialist.	167459012 (Patient referral to specialist)	April 7, 2022 Edit
Referral to other doctor	Group Therapy Referral	Please see Dr. Talk for group therapy.	2549709018 (Referral to psycho-educational group)	April 11, 2022 Edit

New Care Plan Item

Instructions

Plan type Goal
 Patient education
 Patient decision aid

Scheduled date

Snomed code

Title

[Save Care Plan](#)

Diagnostic Imaging Report data can be entered in the patient's chart by selecting the **Imaging Orders** tab and **+ Add New Order** and entering the details.

Test Code	Code System	Name	Comments	Date
70350	LOINC	X-RAY HEAD FOR ORTHODONTIA	Comments	Feb. 9, 2011

Tasks 3

Problem List 15

Medication List 10

Send eRx

Allergy List 4

Drug Interactions 8

CQMs

Intake Data

Lab Orders

Immunizations

Growth Charts

onpatient Access

Education Resources

Communication

Family History

Imaging Orders

Imaging Orders

Ordering Dr.	Image Order	CPT Code	Date	Status	File	Comments
James Smith	X-RAY HEAD FOR ORTHODONTIA	70350	April 22, 2021, 11:25 a.m.	Results Reviewed with Patient	X-ray Head Side	Comments Edit Delete

[Edit Existing Imaging Order](#) [+ New Order](#)

CPT Code

Description

Doctor comments

Order status

Scanned in result

Description of order

Comment from Dr. on imaging order or result.

Status of Order

Scanned in PDF for image (optional)

[Submit Order](#)

Health Concerns

Health Concerns data can be entered into the patient's chart by scrolling down to the **Care Plan** section under the **Clinical Dashboard** tab.

Health Concerns Section

Health Concern	Date
Heart Syndrome Concern	Dec. 20, 2022

Additional Options:

[Care Plan](#) | [Care Team Members](#) | [Functional Status](#) | [Mental Status](#) |

Entire Care Plan

Type	Plan	Instructions	SNOMED Code	Scheduled	
Health Concerns	Heart Concern Example	Exercise.	1503013 (Suspended heart syndrome)	Dec. 12, 2022	Edit

New Care Plan Item

Instructions

Plan type:

Scheduled date:

Snomed code:

Title:

[Save Care Plan](#)

Goals

Goals data can be entered into the patient's chart by scrolling down to the **Care Plan** section under the **Clinical Dashboard** tab.

Goals Section

Goal	Value	Date
Weight Loss Goal	Weight loss goal achieved.	Goal from Dec. 20, 2022

Additional Options:

[Care Plan](#) | [Care Team Members](#) | [Functional Status](#) | [Mental Status](#) |

Entire Care Plan

Type	Plan	Instructions	SNOMED Code	Scheduled	
Goal	Weight Loss Goal	Weight loss goal achieved.	2735843011 (Goal achieved (situation))	Dec. 20, 2022	Edit

New Care Plan Item

Instructions

Plan type:

Scheduled date:

Snomed code:

Title:

[Save Care Plan](#)

Problems

Problem (ICD-10) data can be entered through various paths on both the web and EHR app versions of DrChrono.

Some examples are:

- Patient's chart > Problem List
- Appointment window > Billing > ICD-10 Codes
- iPhone > Patient Menu > Problems
- iPad > Visit > Assessment or Billing Information

Problems

SNOMED-CT Code	ICD-CM Code	ICD-CM Version	Problem	Effective Dates	Problem Status
197928006	N39.0	10	Chronic urinary tract infection (disorder)	11/03/2020	active
30611007	M41.20	10	Idiopathic scoliosis AND/OR kyphoscoliosis (disorder)	11/03/2020	active
444026000	T78.49XA	10	Multiple environmental allergies (disorder)	11/03/2020	active
	A06.5	10	Amebic lung abscess	11/03/2020	active
	I10	10	Essential (primary) hypertension	01/26/2021	active
	A15.0	10	Tuberculosis of lung	11/03/2020	active
	C39.0	10	Malignant neoplasm of upper respiratory tract, part unspecified	11/03/2020	active
	M54.5	10	Low back pain	11/03/2020	active

Procedures

Similar to problems, procedure data (CPT and HCPCS codes) have various points of entry in DrChrono. Some examples include

- Appointment window > Billing > CPT and/or HCPCS Codes
- Billing > Live Claims Feed > Date of Service > Line Item Transactions
- View Clinical Note > Billing
- iPad/iPhone EHR App > Visit > Billing > CPT and/or HCPCS

Procedures

Procedure	Date	Status
99213 OFFICE O/P EST LOW 20-29 MIN	Dec. 17, 2020	Completed
1123F ACP DISCUSS/DSCN MKR DOCD	Jan. 11, 2021	Completed
G8462 Pt intellig couns no antivir tx	Jan. 11, 2021	Completed
97101 PT EVAL LOW COMPLEX 20 MIN	Jan. 13, 2021	Completed
99213 OFFICE O/P EST LOW 20-29 MIN	Jan. 13, 2021	Completed
G8588 Syst bp <140	Jan. 13, 2021	Completed
99213 OFFICE O/P EST LOW 20-29 MIN	Jan. 22, 2021	Completed
3046F HEMOGLOBIN A1C LEVEL >9.0%	Jan. 22, 2021	Completed
G0438 Ppps initial visit	Jan. 22, 2021	Completed

Schedule Appointment

Appointment: **Billing** | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Billing Status: Balance Due
 ICD Version: ICD-10
 Patient Payment: \$ | \$1.00 | Copay: \$50
 Pr Authorization Approval:
 Referral #:
 Payment Profile: Cash
 Billing Profile:
 Billing Pick List: Choose Codes from Pick List
 Diagnosis Pick List: Choose Codes from Pr Problems
 Credit Card Payment: Process Credit Card

HCFA Box 10 - Is patient's condition related to:
 Employment: No
 Auto Accident: No
 Other Accident: No
 Onset Date Type: Chest of Current Symptoms
 Onset Date:
 Other Date Type: Other Date Type
 Other Date:

Line Items transactions

Patient's unallocated payment \$371.10 | Appt. does not have unallocated payment | Primary Insurer: (PP191743) GEICO | COPD | Fail Risk | Must lay down for blood draw

Line Item	ICD-10	Description	NDC Code	Quantity	Units
1	H52.223	Regular astigmatism, bilateral		1	LN (Lns)

No ICD-9 codes found for this appointment.

Code/Check Date	Description	Mode/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Ag	Type
99213	OFFICE O/P EST LOW 20-29 MIN			1.00		\$175.00	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	ready to audit	
99213	OFFICE O/P EST LOW 20-29 MIN			1.00		\$200.00	\$200.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	ready to audit	

Claims Billed: \$200.00 | Adjustments: \$0.00 | Insurer Paid: \$0.00 | Patient Paid: \$61.00

ICD-10 Codes | Find Diagnosis codes | **CPT Codes** | Find CPT Procedure codes

1 M54.5 Low back pain | 1 99213 OFFICE O/P EST LOW 20-29 MIN 175.00

ICD-9 Codes to Convert | Find Diagnosis codes | **ICD-9 Codes** | Find ICD-9 Codes

ICD-10 Codes | Find Diagnosis codes | **CPT Codes** | Find CPT Procedure codes

1 99213 OFFICE O/P EST LOW 20-29 MIN 175.00
 Modifiers: --- | --- | --- | ---
 Quantity/Minutes: 1.00
 Diagnosis Pointers: 1.0:0.0

NDC Codes | Find NDC Codes | **NDC Code** | **Quantity** | **Units** | **Line Item**

Custom Codes | Find Custom Procedure codes | **Code** | **Description** | **Price**

HCPCS Codes | Find HCPCS Procedure codes

8:04 PM - Fri Apr 30

Close

Jenny (Len) Harris | Female | 41 | 02/19/1980 | CC Chief complaint
 04/19 09:45AM

Subjective	Price	Modifiers	Quantity	Diagnosis Pointers
1139F: eped bk pain for >6 wks	\$175.00		1.00	1:0:0.0
99213: office o/p est low 20-29 min	\$175.00		1.00	1:0:0.0

Note: Codes for both Problems and Procedures can be entered manually or through billing profiles, the billing pick list, or by adding codes to your clinical forms.

Lab Tests

Lab test data is entered by sending lab orders or entering the data manually. The data can be found in the patient's chart under **Lab Orders**.

Lab Tests

Test Code	Code System	Name	Date
	LOINC	HEPATIC FUNCTION PANEL	Jan. 30, 2020
	LOINC	CBC (H/H, RBC, INDICES, WBC, PLT)	Jan. 30, 2020
	LOINC	VALPROIC ACID	Jan. 30, 2020

Demographics | Appointments | Clinical Dashboard | 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 | Communication | Family History | Imaging Orders | Implantable Devices | App Directory | Health Gorilla | Physitrack

Quest Diagnostics

Billing information

Bill to: Patient Doctor Insurance
 Insurance info: 87726: United Healthcare
 PO Box 740800
 Atlanta, GA 30374-0800
 ICD-10 codes: K75.89

Order-wide information

Appointment: 11/03/2022 02:00PM
 Notes to lab:
 Reminder Time: 12h 24h 3d 7d 2w Other (hours) If results are not received within this time period, we'll send you a reminder to follow up with the patient.
 Send to Patient Service Center?

Collection date/time: 01/30/2020 09:30 PM

Tests

Test: 10256 - HEPATIC FUNCTION PANEL
 Test: 1759 - CBC (H/H, RBC, INDICES, WBC, PLT)
 Test: 916 - VALPROIC ACID

Results

Lab results can be found in the patient chart under **Lab Orders**. Data can be entered manually or through an integration with our lab partners.

Lab Test Results

Location: quest

Order	Loinc	Date		
VALPROIC ACID	916	Jan. 30, 2020		
Name	Value	Range	Interpret	Date
Valproate SerPl-mCnc	38.6 mg/L	50.0-100.0	low	Jan. 30, 2020

Location: quest

Order	Loinc	Date		
CBC (H/H, RBC, INDICES, WBC, PLT)	1759	Jan. 30, 2020		
Name	Value	Range	Interpret	Date
WBC # Bld Auto	4.1 thous/uL	3.7-11.2	no comment	Jan. 30, 2020
RBC # Bld Auto	4.68 Million/uL	4.10-6.00	no comment	Jan. 30, 2020
Hgb Bld-mCnc	14.4 g/dL	12.8-17.3	no comment	Jan. 30, 2020
Hct Vfr Bld Auto	42.2 %	38.3-50.7	no comment	Jan. 30, 2020
MCV RBC Auto	90.1 fL	80.0-100.0	no comment	Jan. 30, 2020
MCH RBC Qn Auto	30.8 pg	26.0-32.0	no comment	Jan. 30, 2020
MCHC RBC Auto-mCnc	34.2 g/dL	32.0-36.0	no comment	Jan. 30, 2020
RDW RBC Auto-Rto	14.1 %	11.5-14.5	no comment	Jan. 30, 2020
Platelet # Bld Auto	161 thous/uL	142-404	no comment	Jan. 30, 2020

Location: quest


Order	Loinc	Date		
HEPATIC FUNCTION PANEL	10256	Jan. 30, 2020		
Name	Value	Range	Interpret	Date
Prot SerPl-mCnc	7.1 g/dL	6.3-8.3	no comment	Jan. 30, 2020
Albumin SerPl BCG-mCnc	4.5 g/dL	3.4-5.4	no comment	Jan. 30, 2020
Bilirub SerPl-mCnc	0.7 mg/dL	0.4-2.0	no comment	Jan. 30, 2020
Bilirub Direct SerPl-mCnc	<0.2 mg/dL	0.0-0.2	no comment	Jan. 30, 2020
ALP SerPl-cCnc	55 IUnit/L	38-126	no comment	Jan. 30, 2020
AST SerPl-cCnc	25 IUnit/L	15-41	no comment	Jan. 30, 2020
ALT SerPl w/o P-5'-P-cCnc	35 IUnit/L	5-41	no comment	Jan. 30, 2020
Globulin Ser Calc-mCnc	3.0 g/dL	2.3-3.8	no comment	Jan. 30, 2020
Albumin/Glob SerPl	2.0	0.8-2.1	no comment	Jan. 30, 2020

Manage Lab Orders

+ New order

Quest Diagnostics

Filter

Appointment	Tests	Date	Documents	Label	Status
N/A	HEPATIC FUNCTION PANEL CBC (H/H, RBC, INDICES, WBC, PLT) VALPROIC ACID	1/30/20 7:12 PM	Lab Result - 1/30/20 7:12 PM (Download) (Fax)  1 message note	Print Label	Results Received



Report Status: Final
SAMPLE, JASON

Patient Information	Specimen Information	Client Information
SAMPLE, JASON DOB: 07/18/1999 AGE: 20 Gender: M Phone: 650.555.5555 Patient ID: SJ111111 Health ID: 112233445566	Specimen: AB111111S Requisition: 0000001 Lab Ref #: 12345678 Collected: 01/30/2020 / 12:03 CST Received: 01/30/2020 / 13:41 CST Reported: 01/30/2020 / 18:08 CST	Client #: 87654321 MAIL000 SMITH, JAMES FAMILY PRACTICE 123 FAKE ST ANYTOWN, ST 12345

Test Name	In Range	Out Of Range	Reference Range	Lab
HEPATIC FUNCTION PANEL				Q2G
TOTAL PROTEIN	7.1		6.3-8.3 g/dL	
ALBUMIN	4.5		3.4-5.4 g/dL	
BILIRUBIN TOTAL	0.7		0.4-2.0 mg/dL	
BILIRUBIN DIRECT	<0.2		0.0-0.2 mg/dL	
ALKALINE PHOSPHATASE	55		38-126 IUnit/L	
AST	25		15-41 IUnit/L	
ALT	35		5-41 IUnit/L	
GLOBULIN	3.0		2.3-3.8 g/dL	
A/G RATIO	2.0		0.8-2.1	
CBC (H/H, RBC, INDICES, WBC, PLT)				Q2G
WHITE BLOOD CELL COUNT	4.1		3.7-11.2 thous/uL	
RED BLOOD CELL COUNT	4.68		4.10-6.00 Million/uL	
HEMOGLOBIN	14.4		12.8-17.3 g/dL	
HEMATOCRIT	42.2		38.3-50.7 %	
MCV	90.1		80.0-100.0 fL	
MCH	30.8		26.0-32.0 pg	
MCHC	34.2		32.0-36.0 g/dL	
RDW	14.1		11.5-14.5 %	
PLATELET	161		142-404 thous/uL	
VALPROIC ACID		38.6 L	50.0-100.0 mg/L	Q2G

PERFORMING SITE:

Social History

Social History data can be entered in the patient chart under **Demographics > Smoking Status**. Select **+ Add Record** select the **Smoking Status** from the drop-down and **Create**. Only the most recent smoking status will be included.

Social History also includes the birth sex of the patient based on the Sex entered under the **Demographics** tab.

Social History

Social History Element	Effective Dates
Smoking Status: Former smoker (8517006)	Starting from Nov. 1, 2022
Birth Sex: Female	

Important Demographics Insurances Authorizations **Smoking Status** Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance. Fall Risk

Smoking Status

Smoking Status	Start Date	Recorded Date	
Former smoker	2022-11-01	2022-11-16	Edit Delete
Never smoker	2021-11-01	2022-05-05	Edit Delete

+ Add Record

Important Demographics Insurances Authorizations **Smoking Status** Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance. Fall Risk

Demographics

Patient SSN

Patient Date of birth e.g. 8/8/1979

Approx Age (if DOB unknown)

Sex

Vital Signs

Vital Signs data can be entered in the appointment window, in the clinical note, or through the iPhone or iPad EHR app.

Vital Signs

Measurement Date	Height	Weight	Blood Pressure	Heart Rate	O2 Sat	Resp Rate	Temp	BMI
April 22, 2021	56.00 in	125.00 lb	120/85 mmHg	89 /min	99.00 %	99 /min	98.60 F	28.02

Schedule Appointment

Appointment Billing Eligibility **Vitals** Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Units Full Vitals History (pdf) Full Vitals History (csv)

Note Rendering Options: Newest to oldest Date on side

Name	04/14/2021 08:00 AM	04/14/2021 08:00 AM	04/14/2021 08:10 AM	04/15/2021 09:30 AM	04/19/2021 09:40 AM	04/22/2021 at 09:30 AM
Temperature (F)						98.60
Pulse (bpm)						89
Blood Pressure (mmHg)						120 / 85
Respiratory Rate (rpm)						99
Oxygen Saturation (%)						99.00
Height (in)						56.00
Weight (lb)						125 lb 0
BMI (kg/m ³)						28.02
Pain (1-10)						
Smoking Status						Never smoker
Head Circumference (in)						

Jenny (Jen) Harris | Female | 41 years | 02/11/1980 | HA_E000001 | Brenden Wiseman | 04/22/2021

Locked Note: This note has been locked.

System Vitals

Name	04/14/2021 08:00 AM	04/14/2021 08:00 AM	04/14/2021 08:10 AM	04/15/2021 09:30 AM	04/19/2021 09:40 AM	Current Visit 04/22/2021 at 09:30 AM
Temperature (F)						98.60
Pulse (bpm)						89
Blood Pressure (mmHg)						120 / 85
Respiratory Rate (rpm)						99
Oxygen Saturation (%)						99.00
Height (in)						56.00
Weight (lb)						125 lb 0
BMI (kg/m ³)						28.02
Pain (1-10)						
Smoking Status						Never smoker
Head Circumference (in)						

1:59 PM J. Harris Save

System Vitals Neck Disability Index Test Flowsheet

	04/19/2021 09:40 AM	4/22/21 12:00 AM
Temperature (F)		98.6
Pulse (bpm)		89
Blood Pressure (mmHg)		120/85
Respiratory Rate (rpm)		99
Oxygen Saturation (%)		99.00
Height (in)		56
Weight (lb-ounce)		125-0
BMI		28.02
Pain		
Smoking Status	Never smoker	Never smoker
Head Circumference (in)		

J. Harris 02/11/1980 Save

System Vitals Neck Disability Index Test Flowsheet Testing

	04/14/2021 08:00 AM	04/14/2021 08:10 AM	04/15/2021 09:30 AM	04/19/2021 09:40 AM	4/22/21 9:30 AM
Temperature (F)					98.6
Pulse (bpm)					89
Blood Pressure (mmHg)					120/85
Respiratory Rate (rpm)					99
Oxygen Saturation (%)					99.00
Height (in)					56
Weight (lb-ounce)					125-0
BMI					28.02
Pain					
Smoking Status				Never smoker	Never smoker
Head Circumference (in)					

If pediatric vital percentiles are used, they will be included in the CCDA.

Pediatric Vitals Note Rendering Options: Newest to oldest Date on top

Name	Current Visit
	11/18/2022 at 10:25 AM
Weight-for-Length Percentile (%)	50
Head Occipital-frontal Circumference Percentile (%)	90
BMI Percentile (%)	90
Oxygen Concentration (%)	98

Close C. Patient 11/30/2020 Save

System Vitals	Example Vitals	Pediatric Vitals	Today
0 / 0			9:30 AM
Weight-for-Length Percentile %			70.00
Head Occipital-frontal Circ Pct %			75.00
BMI Percentile %			80.00
oxygen_concentration %			97.00

Vital Signs

Measurement Date	Height	Weight	Blood Pressure	Heart Rate	O2 Sat	Inhaled Oxygen Flow Rate	Inhaled Oxygen Concentration	Resp Rate	Temp	BMI	Weight for Length Percentile	Head Circumference Percentile	BMI Percentile
Nov. 18, 2022	30.00 in	14 lb 0 oz	85/58 mmHg	86 /min	96.00 %	N/A L/min	98 %	30 /min	98.60 f	10.94	Weight-for-length Percentile CDC Unknown, 2-20 Years Chart 50 %	90 % CDC Unknown, 0-36 months Chart	90 % CDC Unknown, 2-20 years Chart
Nov. 29, 2022	33.00 in	16 lb 0 oz	85/58 mmHg	85 /min	96.00 %	N/A L/min	98 %	30 /min	98.60 f	10.33	Weight-for-length Percentile CDC Unknown, 2-20 Years Chart 55 %	90 % CDC Unknown, 0-36 months Chart	90 % CDC Unknown, 2-20 years Chart