C-CDA Importing and Reconciling Patient Data

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You can import a C-CDA to a patient's chart. Once uploaded, you can then reconcile their medications, problems, and allergies.

In this article, we will look at adding information for existing patients and new patients.

Existing Patients

You can upload a new C-CDA file to a patient's chart in 2 places in their chart and in your accounts patient list.

1. Go to **Patients** > **Patient Lis**t and select Update Patient (**via C-CDA XML**).

OR

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

2. If in the chart, 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. You can select an appointment, add a date and description, and preview the data. If the patient is a new patient to the practice or has transitioned from a different clinical care setting through a referral; you can indicate the same by linking the C-CDA with the appointment.

To be able to select an appointment date, the **Transition of Care** or **Referral** checkbox in the appointment window must be checked and saved with the appointment.

OR

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

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	

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 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

	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.**

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

New Patients

You can create a new patient in your DrChrono account. Go to **Patients** > **Patient List**.

Navigate to the **Clinical Dashboard** in the patient's chart.

Scroll to Import Patient C-CDA XML.

Select a file and click **Preview**.

Import Patient C-CDA XML

Type of record:	C-CDA — Consolidated Clinic ▾
File to upload:	Choose File No file chosen
	Preview

Next, select **Finalize & Start Reconciliation**. The patient's chart will be created with the information in the C-CDA.

Preview This Document Before Uploading to the Patient Record!

Import Clinical Record:

Transtition of Care	[▾]	
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.

We were unable to find a matching patient record for this document, it will be created automatically, unless you create the patient record first.

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

Preview Imported Clinical Document

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

Patient Health Summary

Patient	Pediatric Patient		
Date of birth	September 22, 2018	**Sex**	Male
Race	Unknown	**Ethnicity**	Unknown
	Unknown		
Contact info	Primary Home:	**Preferred Language**	Information not available
	123 Fake St		
	Baltimore, MD 21212, US	**Patient IDs**	PAPE000002.2.16.840.1.113883.3.7621