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

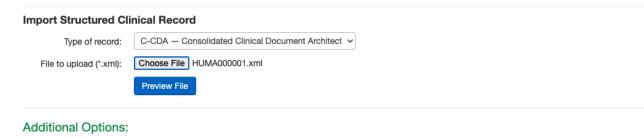
You can upload a new C-CDA file to a patient's chart in 2 places in their chart and in your accounts patient list.

1. Go to Patients > Patient List 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.



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

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.

Schedule Appointment									ж	
Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper	
Type										

Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper
Type	Appoint	tment ∩Vio	deo Visit	Walk-in Trar	sition of Ca	re 🔽 Referral			

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.

Preview This Docur	nent Before Uploading to the Patient Rec	ord!					
Import Clinical Reco	rd:						
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	nt 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 Reco	nciliation					
Preview Imported C	Clinical Document						
Re-order sections Ch	eck for Errors		Toggle Preview				
Patient Health S	Summary						

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 Das	shboard						
Ø Problem	Current Patient Chart - Problem							
⊘ Allergy	Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
Medication	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	ICD-10 T78.49XA		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	Q00.01		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
	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	
	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	
	Hereditary breast and ovarian cancer syndrome (disorder)	ICD-10	C50.919	254843006	Active		07/25/2018	
	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 th	ne CCDA file again and make change	5.					
	Confirm Preview Finalized Problems							
	Preview Fina	alized 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.**

🔗 Problem	Preview Finalized Problem List							
⊘ Allergy	Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
Medication	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 c	hanges.					
	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.

lack to Clinical Dashboard											
🔗 Problem	Finalized Problem List										
⊘ Allergy	Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By			
O Medication	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	Q00.01		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.

Problem	Current P	atient Chart - Allergy								
	Allergy		Reaction			RxNorm Code	Status	Date Changed	Date Crea	ated Edited By
Medication	penicillin		Hives			7984	Active		10/13/202	1
	Non-Drug A	llergy: Cats	Shortness of breath/dif	ficulty breathing			Active		10/13/202	1
	Non-Drug A	llergy: Milk	Hives				Active		10/13/202	1
	d00170 asp	irin	Hives			1191	Active		10/13/202	1
	C-CDA Fil	e - Allergy								
		Allergy		Reaction	RxNorm Code	Status	Date Change	I	Date Created	Edited By
		d00118 sulfADIAZINE		None	10171	Active	09/23/2022		09/23/2022	
		d00118 sulfADIAZINE penicillin		None	10171 7984	Active	09/23/2022		09/23/2022	

carrent	Patient Chart - Medication					
Medicatio	1	SIG	Date	Status	Date Created	Edited By
cyclobenza	orine 10 mg oral tablet	1 a day as needed		Active	11/10/2021	
Flonase 50	mcg/inh nasal spray			Active	10/13/2021	
Cranberry	ral capsule			Active	10/13/2021	
12 Hour Na	sal		02/21/2013 - 05/20/2013	Active	10/13/2021	
ZyrTEC 5 m	g 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	Dintment mixed with Bacitracin	1		Active	02/03/2022	
indometha	in 2mg/ml, cherry syrup ad 150ml	5ml b.i.d		Active	02/04/2022	
Indometha	in 2mg/ml Cherry Syrup ad 150ml	Sml b.i.d		Active	02/04/2022	
acetamino	ihen 160 mg oral tablet, disintegrating	1 capsule once a day		Active	02/04/2022	
C-CDA Fi	e - 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	
			10/13/2021 - 10/13/2021	Active	09/23/2022	
	Avastin 25 mg/mL intravenous solution					
	Avastin 25 mg/mL intravenous solution CeleBREX 200 mg oral capsule		10/13/2021 - 10/13/2021	Active	09/23/2022	
			10/13/2021 - 10/13/2021 10/13/2021 - 10/13/2021	Active	09/23/2022	
	CeleBREX 200 mg oral capsule					4 1 2
	Gycklemzay Fienase 59 Cramberry c Ta Hour Na ZyrTEC 5 m Aquaphor Aquaphor Aquaphor Aquaphor Accommon sector sector Aquaphor C-CDA Fill C C C	Appaphor Ontment mixed with Bactracin indemethacin 2mg/mit, cherry syrup ad 150ml indomethacin 2mg/mit Oherry Syrup ad 150ml actaminophen 160 mg oral tablet, duintegrating C-CDA File - Medication more phentermine 37.5 mg oral capsule zofran ODT # mg oral tablet, duintegrating	optioencaprine 10 mg out tablet 1 ad yas needed Rease 30 mg/mb haal yary	opdomagnine To my and tablet. 1 a day a needed Repaise Singright hashal spory 0.0212/031 - 60:020.013 To not hashal 0.0252/031 - 60:020.013 RyTEC Sing and tablet, drewable take 1 tab po opt 0.0552/031 - 40:01.021 Aquaphor 1 0.0552/031 - 40:01.021 Aquaphor Ommerer mules with Bucktacon 1 0.0552/031 - 40:01.021 Indemethation Zingrim (therry sprug ad 150m) Sel build	fordemagning mg and tables: faday angended faday faday faday faday faday faday faday faday	indextagene tilting ond tablet indig angened Anse indig angened indextagene tilting ond tablet indig angened Anse indig angened indextagene runned with Backraces indig angened indig angened Anse indig angened indextagene runned with Backraces indig angened indig angened Anse indig angened indextagene runned with Backraces indig angened indig angened Anse indig angened indextagene runned with Backraces indig angened indig angened Anse indig angened indextagene runned with Backraces indig angened angene

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.



Back to Clinical Dashboard

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	t 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 repro	ocessed.							
Type of document	C-CDA — Consolidated Clinical Document Archit	tect V 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 & Star	t Reconciliation							
Preview Imported C	linical Document								
Re-order sections Ch	ack for Errors			Toggle Preview					
Patient Health	Summany								
	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 01010 US	Detient IDs	DADE000000 0 16 840 1 110880 0 7601						