

# Import and Merge Data for C-CDA Files for Individual Patients

08/29/2024 3:15 pm EDT

You can import a C-CDA file 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 below the table header stating 'No [category] 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' form. It has a title 'Import Structured Clinical Record'. Below the title is a 'Type of record:' dropdown menu with the selected option 'C-CDA - Consolidated Clinical Document Architect'. Below that is a 'File to upload (\*.xml):' field with a 'Choose File' button and the filename 'HUMA000001.xml'. Below the file field is 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** !

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**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    **Last Scheduled Appt:** Tue Sep 27, 2022

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

**CDS:** [Adult Immunization Schedule Age: 27-49](#)

[New Referral](#)   [Fax Demographics](#)   [Print Demographics](#)   [Apple Health App Data](#)   [Vitals](#)   [+ Schedule New Appointment](#)

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

[+ Add Allergy](#)   [Print List](#)

**Current Allergy List**

Allergy	Reaction	RxNorm Code	Status	Notes	Updated	
penicillin	Hives	7984	active	Was allergic since a child.	Oct 13, 2021	<a href="#">Edit</a> <a href="#">Delete</a>

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** !

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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	<span style="border: 1px solid red; padding: 2px;">Unfinished</span>	<span style="border: 1px solid red; padding: 2px;">Unfinished</span>	<span style="border: 1px solid red; padding: 2px;">Unfinished</span>	<a href="#">Continue Reconciliation</a>

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	
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.

[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"/>	phenfermine 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)

Phone: (443) 555-5555 Email: sample@sample.com  
Address: 1001 N Rengstorff Ave  
Mountain View, CA 94040  
CDS: Adult Immunization Schedule Age: 27-49

Date Added: Oct. 13, 2021  
Last Scheduled Appt: Fri Sep 23, 2022  
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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
09/23/2022	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](#)