

# Understanding C-CDA Export Data in DrChrono

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You can export patient data in C-CDA (Consolidated Clinical Document Architecture) format in bulk, and download or view it individually. The data is formatted in XML format and can also be viewed as a PDF when you export it individually.

Clinical notes will only appear in the CCDA file based on the form type selected for the form. Form types **MUST** be associated with a form for the clinical note generated text to appear in the CCDA file.

## CCDA Version Settings | Viewing C-CDA Data | C-CDA Document Components

### CCDA Version Settings

DrChrono now supports two CCDA versions that can be configured in your account settings:

- **ONC Cures CCDA** (Default): Generates CCDA files using the current format
- **ONC HTI-1 CCDA**: Generates CCDA files with USCDI v3 and HTI-1 ONC updates, including enhanced data elements for interoperability

To change your CCDA version:

1. Navigate to **Account > Practice Settings > Patient Chart Settings**
2. Select **CCDA Version**
3. Choose your preferred version

Patient Chart Settings

Set up patient chart from practice level.

Patient Header

Patient Chart Side Navigation

CCDA Version

CCDA Version

Choose which CCDA version is generated for your practice. Applies to Patient Summary, referrals (Direct), note-lock auto-CCDA, bulk exports, OnPatient, and FHIR APIs.

Selected CCDA Version

☒ **ONC Cures CCDA**  
Generate CCDA files with USCDI version 1 (v1) (July 2020 Errata) data meeting HL7® C-CDA® R2 Implementation Guide: C-CDA Templates for Clinical Notes R2.1 Companion Guide, Release 2.

☐ **ONC HTI-1 CCDA**  
Generate CCDA files with USCDI version 3 (v3) and C-CDA R2 IG Companion Guide, Release 4.1.

### Viewing C-CDA Data

There are two easy ways to view what is included in a C-CDA export from the patient's chart under the Clinical Dashboard section. You can select **Download PDF** or **Display C-CDA XML** from the Clinical Summary dropdown.

Patient Chart

Patient Summary

Immunizations

Family History

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Tasks

Clinical Dashboard

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 Sept. 8, 2025, 9:39 a.m.

Summary Of Care Provided

Appointment

Summary of Care

Summary of Care requested and not available

Wed Jun 14, 2023

No Summary of Care linked

Ongoing Problems

Problem	ICD-10-CM	ICD-9-CM	SNOMED	Diagnosis Date	Status	Notes
Child neglect, Suspected, Initial encounter	T76.02XA			Aug. 26, 2025, midnight	Active	
Angle closure glaucoma suspect of right eye	H40.001		1003489004	Jan. 17, 2024, midnight	Active	
Diabetes mellitus due to underlying condition with hyperosmolarity with coma	E08.01			July 28, 2025, midnight	Active	
Diabetes mellitus due to underlying condition with unspecified diabetic retinopathy without macular edema	E08.319			Jan. 4, 2024, midnight	Active	
B cell lymphocyte aplasia caused by drug	T50.905A		1003473002	Jan. 17, 2024, midnight	Active	

## C-CDA Document Components

### 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	Peter Abbott		
Patient Previous Name			
Date of birth	January 27, 1984	Sex	Male
Race	Unknown	Ethnicity	Not Hispanic or Latino
Contact info	Primary Home: 225 Schilling Circle ave Apt 345 Hunt Valley, MD 21031, US Tel (Primary Home): +1(443)-909-0636	Previous Address	address not available
Preferred Language	Other		
Patient IDs	105148754 2.16.840.1.113883.3.7621 443-64-5188 2.16.840.1.113883.4.1		
Document Created	December 4, 2025, 16:25:56, EST		
Care provision	from September 22, 2022, 11:13:30, EST to December 4, 2025, 16:25:56, EST		
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Document maintained by	K Parker Inc		
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### Document Header Information

The document header includes essential patient identification and administrative information:

**Administrative Gender Code:** Patient sex is expressed using SNOMED CT codes:

- Male (248153007)
- Female (248152002)
- Other/Unknown (184115007)

**Language Communication:** Patient's preferred language using ISO 639-2 alpha-3 codes (e.g., "eng" for English)

**Provenance Information:** Each clinical entry (problems, medications, allergies, procedures, immunizations, SDOH observations) includes author information showing:

- Author name (first and last)
- Author NPI
- Authoring date/time
- Represented organization name

## Table of Contents

**Table of Contents** is a good way to see the data included in the C-CDA 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](#)
- [Functional Status](#)
- [Mental Status](#)
- [Immunizations](#)
- [Instructions](#)
- [Medical Equipment](#)
- [Medications Administered](#)
- [Medications](#)
- [Assessments](#)
- [Plan of Care](#)
- [Health Concerns Section](#)
- [Goals Section](#)
- [Problems](#)
- [Procedures](#)
- [Lab Test Results](#)
- [Social History](#)
- [Vital Signs](#)

[Show all sections](#)

## Clinical Data Sections

### Allergies and 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.

Allergy Information Includes:

- Allergen/substance
- Reaction
- Severity (Mild, Moderate, Severe)
- Verification status (Unconfirmed, Confirmed, Refuted, Entered-in-error)
- Active or Inactive status

## Encounters

## 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

The encounter data includes:

- Date of service and appointment time
- Location
- Provider
- Care team members
- Reason for visit
- Encounter type

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.

## Functional Status

**Functional Status**

Functional Assessment	Date
Track all the data	2022-12-21

**Additional Options:**

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

**Previous Functional Statuses**

Functional Status Observation (SNOMED Code)	Effective Date
Track all the data (20221221)	Nov. 20, 2022

**Functional Status**

Functional Status observation:

Observation date:

[Add 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.

**Important:** Functional status data uses SNOMED CT codes from the Problem List where Problem Type = Functional Status. This information appears in the Functional Status Section of the CCDA, not in the Problem List section.

## Mental Status

**Mental Status**

Cognitive Assessment	Date
Depression worse in morning (24781000)	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 (24781000)	Dec. 20, 2022

**Mental Status**

Mental Status observation:

Effective date:

[Add 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.



Cognitive status data uses SNOMED CT codes from the Problem List where Problem Type = Cognitive Status. This information appears in the Mental Status Section of the CCD, not in the Problem List section.

## 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](#).

## 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.

## 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**.

## 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
- Reconciliation data with a C-CDA import
- Sending a prescription through the send eRx feature on the web or EHR app

## 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.

## Insurance Providers

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

**Insurance Information Includes:**

- Insurance provider details
- **Coverage Type:** Insurance plan type (e.g., Medicare, Medicaid, Commercial)
- **Coverage Role Type:** Patient relationship to subscriber (e.g., Self, Spouse, Child, Other)

Both Coverage Type and Coverage Role Type are captured from the patient's Demographics > Insurance section.

## 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

**Problem Information Includes:**

- Problem code (ICD-10)
- Problem description
- **Status:** Active, Recurrence, Relapse, Inactive, Remission, Resolved
- **Verification Status:** Unconfirmed, Provisional, Differential, Confirmed, Refuted, Entered-in-error
- Effective dates (start and end dates)

The following problem types are **NOT** included in the Problem List section of the CCDA:

- Functional Status (appears in Functional Status Section)
- Cognitive Status (appears in Mental Status Section)
- Pregnancy Status (appears in Social History Section)
- Smoking Status (appears in Social History Section)

## 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

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 and Results

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 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 Result Information Includes:**

- Test name (LOINC code)
- Result value
- Unit of measure
- Reference range
- Status
- Effective date/time

## Clinical Tests and Results

Clinical test and result data can be captured using the Clinical Test & Result form element in Form Builder. This

data appears in the Results section of the CCDA.

**Clinical Test Information Includes:**

- Clinical Test Name (LOINC code)
- Clinical Test Result (numeric or text value)
- Date performed
- Customized notes

## **Assessments**

Assessments section includes any information 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.

## **Social History Section**

Social History captures important social determinants of health and patient background information.

### **Smoking Status**

**Data Sources:**

- Patient chart under Demographics > Smoking Status (most recent status)
- Active problems in Problem List that match Smoking Status Value Set codes
- Smoking-related SNOMED codes in the billing attachment section of forms

Only the most recent smoking status is included in the CCDA.

### **Birth Sex**

Birth sex of the patient based on the Sex entered under the Demographics tab.

### **Pregnancy Status**

**Data Sources:**

- Active problems in Problem List that match Pregnancy Value Set codes
- Pregnancy-related SNOMED codes in the billing attachment section of forms

Pregnancy status appears in the Social History section using the Pregnancy Observation template, not in the Problem List.

### **Tribal Affiliation**

Patient's tribal affiliation can be captured using codes from the TribalEntityUS value set (579 options available).

**Data Includes:**

- Tribal entity code and name
- Effective date when tribal affiliation was observed

### **Occupation and Occupation Industry**

**Occupation Information Includes:**

- Occupation name (SOC code)

- Occupation start date
- Occupation end date (optional)

Occupation Industry Information Includes:

- Industry name (NAICS code)
- Industry start date
- Industry end date (optional)

LOINC Assessments

Social Determinants of Health (SDOH) assessments using LOINC codes are included in the Social History section. These structured assessments capture:

- Assessment name (Parent LOINC code)
- Assessment date
- Questions (LOINC codes)
- Answers (coded responses)
- Scores per question (when applicable)

Plan of Care Section

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.

Plan of Care

Plan Type	Description	Planned Date
Patient clinical instruction	Oral hygiene instructions (97556010)	March 24, 2022
Patient education	Follow instructions for oral hygiene.	
	Behavioral Treatment Education (25028010)	Dec. 26, 2022
	See handouts for wound care information.	
HEPATIC FUNCTION PANEL	Not sent	11/11/2022
CBC (WBC, RBC, INR/PT, WBC, PLT)	Not sent	11/11/2022
VALP/25C ACID	Not sent	11/11/2022
TSH	Not sent	10/06/2022

Diagnostic Imaging Report

Test Code	Code System	Name	Comments	Date
70193	LOINC	Contrast x-ray of larynx	x-ray Spec	April 26, 2022

Referrals and Future Appointments

Reason	Provider	Location	Planned Date
Back Adjustment	Dr. James Smith, MD (443) 555-5555	225 Schilling Circle Hunt Valley, MD 21031	Dec. 23, 2022
Please see a specialist.	None, None, None, Not None	None, None, None, None	April 7, 2022
Please see Dr. Tan for group therapy.	None, None, None, Not 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
Referral to other doctor	Referral to Specialist	Please see a specialist.	167409012 (Patient referral to specialist)	April 7, 2022
Referral to other doctor	Group Therapy Referral	Please see Dr. Tan for group therapy.	2548708018 (Referral to psycho-educational group)	April 11, 2022

New Care Plan Item

Instructions

Plan type

✓ Goal

Scheduled date

Patient education

SNOMED code

Patient decision and

Title

Patient clinical instruction

Referral to other doctor

Health Concerns

Save Care Plan

Care Plan

Care Plan Information Includes:

- Goal name and description
- Associated codes (SNOMED or LOINC)
- Target date
- Status (e.g., active, not started)
- Objectives (when applicable)
- Interventions and instructions
- Related problems

Planned Procedures



Planned procedures can be captured using the Planned Procedure form element in Form Builder.

#### Planned Procedure Information Includes:

- Procedure name and code (SNOMED CT or CPT)
- Planned date
- Status

## Additional Plan of Care Components

The Plan of Care section also includes:

- Patient Education
- Patient Instructions
- Pending lab tests
- Diagnostic Imaging Reports
- Future Appointments
- Referrals

## Diagnostic Imaging Reports

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. Imaging orders use LOINC codes to identify the type of imaging study.

## 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	<a href="#">Edit</a>

**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. 25, 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	<a href="#">Edit</a>

New Care Plan Item

Instructions

Plan type:

Scheduled date:

SNOMED code:

Title:

[Save Care Plan](#)

## Care Team Section

Care Team information captures the collaborative care providers involved in the patient's treatment.

### Care Team Member Information Includes:

- Member name (first and last)
- Care team role (e.g., Primary Care Physician, Specialist, Nurse)
- Care team identifier (NPI or other unique ID)
- Member status (Active, Inactive)
- Effective dates

Care team members can be added and managed through the patient's chart. For more information on adding care team members, see our article [here](#).

## Vital Signs

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

If pediatric vital percentiles are used, they will be included in the C-CDA.