

# Data Included in C-CDA Exports from DrChrono

Last modified on 09/09/2025 3:24 pm EDT

You can export patient data in C-CDA 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.

Clinical notes will only appear on the CCD 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 CCD file.

Persistent forms will no longer automatically populate within the "Assessment" section within the CCD file. A form type must be set for the form's generated text within the rendered clinical note PDF to appear within the CCD file.

Two easy ways of viewing what is included in a C-CDA export are in 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

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	

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.

**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		
Performer	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		

**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
- Encounters
- Family History
- Functional Status
- Mental Status
- Immunizations
- Instructions
- Medical Equipment
- Medications Administered
- Medications
- Insurance Providers
- Assessments
- Plan of Care
- Health Concerns Section
- Goals Section
- 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.

Close

Search

d00170 aspirin active

Hives

Milk active

Hives

Cats active

Shortness of breath/difficulty breathing Note

penicillin active

Hives Note

Eligibility	Current Allergy List
Tasks	<a href="#">Add Allergy</a> <a href="#">Print List</a>
Problem List	
Medication List	
Send eRx	
Allergy List	

Allergy	Reaction	Reflex Code	Status	Notes	Updated	
penicillin	Hives	7884	active	Was allergic since a child.	Nov 03, 2020	<a href="#">Edit</a> <a href="#">Delete</a>
Non-Drug Allergy: Cats	Shortness of breath/difficulty breathing		active	From allergy test.	Nov 03, 2020	<a href="#">Edit</a> <a href="#">Delete</a>
Non-Drug Allergy: Milk	Hives		active		Nov 03, 2020	<a href="#">Edit</a> <a href="#">Delete</a>
d00170 aspirin	Hives	1191	active		Nov 03, 2020	<a href="#">Edit</a> <a href="#">Delete</a>

### Allergies, Adverse Reactions, Alerts

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Drug Allergy (416098002)	d00170 aspirin (1191)	Hives	Active	10/13/2021	

Close

Visit Patient History

H & P SOAP Additional

Check-In Information

Subjective

Objective

Assessment

Plan

Medications & Allergies

Medication (21) Allergy (4) Interaction (0) Medication History

Filters Show in Note: Yes

Search Allergy

d00170 aspirin active

Milk active

Cats active

Shortness of breath/difficulty breathing Note

penicillin active

Hives Note

Preview Note

onpatient / Check-In

Subjective

Objective

Assessment

Plan

Medications & Allergies

Add to Note Yes

Allergy	Reaction	Status	
Non-Drug Allergy: Cats	Shortness of breath/difficulty breathing	active	<a href="#">Edit</a> <a href="#">Delete</a>
Non-Drug Allergy: Milk	Hives	active	<a href="#">Edit</a> <a href="#">Delete</a>
penicillin	Hives	active	<a href="#">Edit</a> <a href="#">Delete</a>
d00170 aspirin	Hives	active	<a href="#">Edit</a> <a href="#">Delete</a>

## 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:** 1:0:0:0



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 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](#).

## 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	<a href="#">Edit</a>
Patient education	Cancer Education	Cancer Education Materials	243072006 (243072006)	April 22, 2021	<a href="#">Edit</a>
Patient clinical instruction	Oral Hygiene Instructions	Oral Hygiene Instructions	58707002 (58707002)	April 22, 2021	<a href="#">Edit</a>

## New Care Plan Item

Instructions

Plan type

Scheduled date

Snomed code

Title

☒ Goal  
☐ Patient education  
☐ Patient decision aid  
☒ Patient clinical instruction  
☐ Referral to other doctor  
☐ Health Concerns

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**.

## 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:

Notes: 1st dose taken during visit

Order status: **Administered during visit**

Close

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	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	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"/> Mirena 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 Save

pheniramine 375 mg oral capsule

Free Text SIG

Dispense Refills DAW

Note to Pharmacy

Indication

Start Date

Order Status

Internal Notes

Administered during visit

Medications Edit Medication Save

aspirin 81 mg oral tablet, chewable

Free Text SIG

Dispense Refills DAW

Note to Pharmacy

Indication

Start Date

Order Status

Internal Notes

Administered during visit

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

## 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. ✗ Fail 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

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

Insurance Company  \*contact support if you can't find an insurance company.

Carrier Payer ID

TPL Code  \*If the Medicaid is Secondary

Insurance ID Number

Insurance group name  \*If available

Insurance group number  \*If available

Insurance plan name  \*If available

Insurance plan type  \*If available

Insurance claim office number  \*If available

Number visits allowed per year

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

Primary Insurance Notes

### Secondary Insurance

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

Insurance Company

Carrier Payer ID  \*printed on back of insurance card

Insurance ID Number

Insurance Group Name  \*If available

Insurance Group #  \*If available

Insurance plan name  \*If available

Insurance plan type  \*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.

## 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

Diagnostic Imaging Report

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

Referrals and Future Appointments

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 <a href="#">Edit</a>
Referral to other doctor	Referral to Specialist	Please see a specialist.	167459012 (Patient referral to specialist)	April 7, 2022 <a href="#">Edit</a>
Referral to other doctor	Group Therapy Referral	Please see Dr. Talk for group therapy.	2549709018 (Referral to psycho-educational group)	April 11, 2022 <a href="#">Edit</a>

New Care Plan Item

Instructions

Plan type

Scheduled date

Snomed code

Title

✓ Goal

Patient education

Patient decision aid

Patient clinical instruction

Referral to other doctor

Health Concerns

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.

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

#### 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

## 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/OSCN MKR DOCD	Jan. 11, 2021	Completed
G8462 Pt intellig counts no ambiv bx	Jan. 11, 2021	Completed
97161 PT DIAL LOW COMPLEX 20 MIN	Jan. 13, 2021	Completed
99213 OFFICE O/P EST LOW 20-29 MIN	Jan. 13, 2021	Completed
G8588 Sys 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 Ppys initial visit	Jan. 22, 2021	Completed

#### Schedule Appointment

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

Patient Superbill Clinical Note Billing Details Other Forms

Billing Status: Balance Due

ICD Version: ICD-10

Patient Payment: \$ \$1.00 Copy: \$20

Pre Authorization Approval

Referral #

Payment Profile: Cash

Billing Pick List: Choose Codes from Pick List

Diagnosis Pick List: Choose Codes from Pick List

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: Onset of Current Symptoms

Onset Date:

Other Date Type: - Other Date Type -

Other Date:

Obtain Bill: \$0.00 Adjustments: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$61.00

ICD-10 Codes: Find Diagnosis codes

Code Description Price (\$)

1 M54.5 Low back pain 175.00

ICD-9 Codes to Convert: Find Diagnosis codes

Code Description

ICD-9 Codes: Find Diagnosis codes

Code Description Price (\$)

1 M54.5 Low back pain 175.00

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: 1.0.0.0

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

#### Line Items transactions

Patient's unallocated payment \$3071.10 Appt. does not have unallocated payment Primary Insurer: (P01N1430) GEICO CCOPD Fail Risk Must try down for blood draw

Line Item	ICD-10	Description	NDC Code	Quantity	Units
1	M52.223	Regular astigmatism, bilateral		1	LN (LN)

No ICD-9 codes found for this appointment.

Code/Check Date	Description	Mode/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Admt	Ins 1 paid	Ins 2 paid	PT Paid	Ins Bal	PT Bal	Status/Ad Type
99213				1.00	1 0 0 0	175.00	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	ready to audit
99204				1.00	1 0 0 0	\$200.00	\$200.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	ready to audit

Repairs ERA Claim Info EDI 837p Verify & Save



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 efx
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

\* Required

### Billing information

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

### Order-wide information

Appointment 11/03/2022 02:00PM  
 Notes to lab  
 Reminder Time 12h 24h 3d 7d 2w Other (hours)  
 Send to Patient Service Center? ☐  
 Collection date/time \* 01/30/2020 03:30 PM

### Tests

Test \* 10256 - HEPATIC FUNCTION PANEL  
 Test \* 1759 - CBC (H/H, RBC, INDICES, WBC, PLT)  
 Test \* 916 - VALPROIC ACID  
 Send order Add another test

## 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 SerPI-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 SerPI-mCnc	7.1 g/dL	6.3-8.3	no comment	Jan. 30, 2020	
Albumin SerPI BCG-mCnc	4.5 g/dL	3.4-5.4	no comment	Jan. 30, 2020	
Billrub SerPI-mCnc	0.7 mg/dL	0.4-2.0	no comment	Jan. 30, 2020	
Billrub Direct SerPI-mCnc	<0.2 mg/dL	0.0-0.2	no comment	Jan. 30, 2020	
ALP SerPI-cCnc	55 IUnit/L	38-126	no comment	Jan. 30, 2020	
AST SerPI-cCnc	25 IUnit/L	15-41	no comment	Jan. 30, 2020	
ALT SerPI 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 SerPI	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	<a href="#">Lab Result - 1/30/20 7:12 PM (Download) (Fax)</a> <a href="#">1 message note</a>	<a href="#">Print Label</a>	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: AB1111111S 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	<a href="#">Edit</a> <a href="#">Delete</a>
Never smoker	2021-11-01	2022-05-05	<a href="#">Edit</a> <a href="#">Delete</a>

+ Add Record

Important Demographics Insurances Authorizations Smoking Status Flags Balance onpatient Payments

Sufficient patient demographics to bill insurance.

Fall Risk

Demographics

Patient SSN

111-22-1111

Patient Date of birth

12/08/1990

e.g. 8/8/1979

Approx Age (if DOB unknown)

Sex

Female

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)

System Vitals

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 08:30 AM	04/16/2021 09:40 AM	Current Visit 04/22/2021 at 08:30 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 <sup>2</sup> )						28.02
Pain (1-10)						
Smoking Status					Never smoker	Never smoker <span>▼</span>
Head Circumference (in)						

H&P

SOAP

ADDITIONAL

APPS

View Locked Note

Unlocked / Check ID

CC / History of Present Illness

Med / Fam / Social History

Medications & Allergies

Review of Systems

Physical Exam

Assessment

Plan

Billing

Jenny [Jen] Harris

Female

41 years

02/11/1980

HA\_E000001

BRUSH WISCONSIN 04/22/2021

Back Pain

Locked Note This note has been locked

Get Growthcharts

Print section

Full Vitals History (pdf)

Full Vitals History (csv)

Units ▼

Note Rendering Options: Newest to oldest ▼ Date on side ▼

System Vitals

Name	04/14/2021 08:00 AM	04/14/2021 08:00 AM	04/14/2021 08:10 AM	04/15/2021 08:30 AM	04/16/2021 09:40 AM	Current Visit 04/22/2021 at 08:30 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 <sup>2</sup> )						28.02
Pain (1-10)						
Smoking Status					Never smoker	Never smoker <span>▼</span>
Head Circumference (in)						

Version

1:50 PM

J. Harris

Save

Close

System Vitals

Neck Disability Index

Test Flowsheet

6/9 / 6/9

04/18/2021  
09:40 AM

4/22/21  
12:02 AM

98.6

Temperature (F)

Pulse (bpm)

89

Blood Pressure (mmHg)

120/85

Respiratory Rate (rpm)

99

Oxygen Saturation (%)

99.00

Height (in)

56

Weight (lb)

125-0

BMI (kg/m<sup>2</sup>)

28.02

Pain

Never smoker

Never smoker

Smoking Status

Never smoker

Head Circumference (in)

Never smoker

Never smoker

Rendering 5 Appointments

Close

J. Harris 02/11/1980

Save

System Vitals

Neck Disability Index

Test Flowsheet

Testing

Testing

18 / 18

04/14/2021  
08:00 AM

04/14/2021  
08:10 AM

04/15/2021  
08:30 AM

04/16/2021  
09:40 AM

4/22/21  
9:30 AM

98.6

Temperature (F)

Pulse (bpm)

89

Blood Pressure (mmHg)

120/85

Respiratory Rate (rpm)

99

Oxygen Saturation (%)

99.00

Height (in)

56

Weight (lb)

125-0

BMI (kg/m<sup>2</sup>)

28.02

Pain

Never smoker

Never smoker

Smoking Status

Never smoker

Head Circumference (in)

Never smoker

Never smoker

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

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

0 / 0

Today  
9:30 AM

70.00

Weight-for-Length Percentile (%)

75.00

Head Occipital-frontal Circ Pct (%)

80.00

BMI Percentile (%)

97.00

oxygen\_concentration (%)

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