

CCDA Reconciliation via Inbound Direct Messaging

Last modified on 01/13/2025 3:03 pm EST

DrChrono has improved the efficiency of handling Inbound Direct Messages by enabling users to initiate CCDA reconciliation directly within the message. This enhancement significantly streamlines workflows, making it faster and easier to manage patient data. Additionally, users can now preview and save file attachments directly to the patient's chart, ensuring a more seamless and organized process for managing patient information.

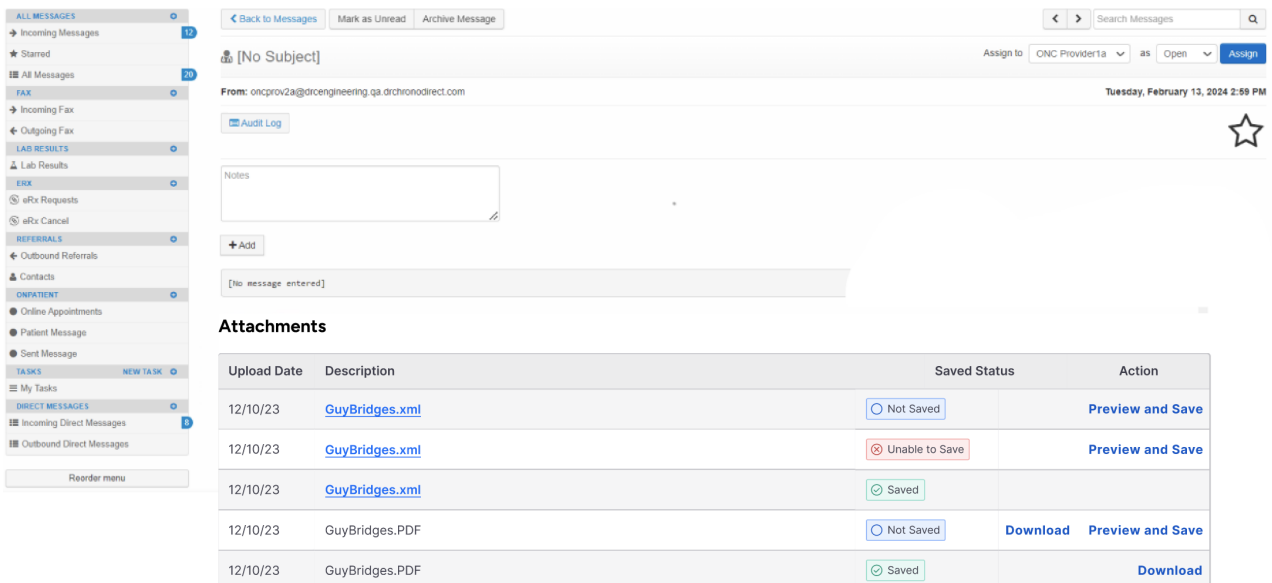
What is Direct Messaging?

Learn more about [Setting Up Direct Messaging](#).

Viewing incoming direct messages

1. Navigate to the message center
2. Scroll to Direct Messages in the left menu
3. Click Incoming Direct Messages

Users will be able to view all incoming messages along with files located in the attachment table.



The screenshot displays the DrChrono interface for viewing an incoming direct message. On the left is a navigation menu with categories like ALL MESSAGES, FAX, LAB RESULTS, eRx, REFERRALS, ONPATIENT, and TASKS. The main content area shows a message from 'oncprov2a@drceengineering.qa.drchronodirect.com' with a subject of '[No Subject]'. Below the message is a 'Notes' field and an 'Attachments' table.

Upload Date	Description	Saved Status	Action
12/10/23	GuyBridges.xml	Not Saved	Preview and Save
12/10/23	GuyBridges.xml	Unable to Save	Preview and Save
12/10/23	GuyBridges.xml	Saved	
12/10/23	GuyBridges.PDF	Not Saved	Download Preview and Save
12/10/23	GuyBridges.PDF	Saved	Download

Incoming direct message attachment table

The attachment table stores both non-CCDA and CCDA files.

- Upload date - date that the file was uploaded.
- Description - the type of attachment (i.e. pdf-image, XML-CCDA).
- Saved status - displays if the file was not saved, saved, or unable to save to the patient's chart.
- Action - option to (Non-CCDA) preview, download and save, (CCDA) preview and save.

Attachment file actions

Non-CCDA attachment files

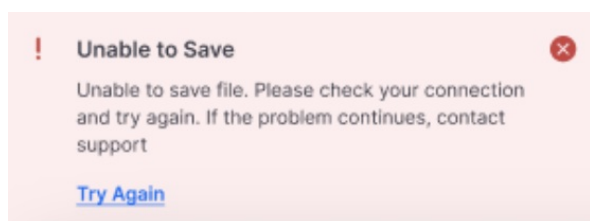
Preview and Save—clicking preview and save under the actions column will direct the user to the preview attachment screen, where they can preview, select a patient to associate, and create a tag and description to save to the patient's chart. The attachment will be saved to the documents section in the patient chart as well as downloaded to the user's personal device (i.e. computer, laptop, etc)

The option to download is only for Non-CCDA files.

Preview Attachment ×

Patient		Sex	N/A
Patient Previous Name		Ethnicity	Not Hispanic or Latino
Date of birth			
Race			
Contact info		Previous Address	Home:
Preferred Language			
Patient IDs			
Document Created	March 22, 2024, 10:22:16, EST		
Care provision	from July 28, 2023, 15:24:45, EST to March 22, 2024, 10:22:16, EST		
Performer	Carly Kakasuleff		
Author			
Contact info			
Document maintained by			
Contact info			
Select Patient	<input type="text" value="Guy Bridges"/> ×		
Tags	Comma Separated <input type="text"/>		
Description	Description of Document <input type="text"/>		
Save to Patient Chart			

If there is an issue saving the file, the user will see a "not saved" status and receive an Unable to Save error message.



CCDA attachment files

Clicking preview and save under the actions column will direct the user to preview the CCDA document before uploading. Users can enter important clinical record information such as patient name, transition of care, date, if data is structured, lab results processed, and type of documents.


When typing a name in the select patient field, a drop-down will list suggested patients that match the demographics in the CCDA file. The user will have to select the correct patient.



The "Select Patient" field will be grayed out when uploading from the Clinical Dashboard, as the patient will already be pre-selected.

Preview This Document Before Uploading to the Patient Record!

Import Clinical Record:

Select Patient: Test2 Patient 

Transition 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.

Preview Imported Clinical Document

After entering the clinical record data, you can Cancel, Save to Patient (chart), or Save and Start Reconciliation.

Preview this document before uploading to the patient record!

Important Clinical Record

Select Patient:

Transition of Care:

Date: Date of Document, necessary to put this document in the patient timeline

Description: Description of Document

Is Structured Data: If selected, is lab results and should be automatically added to patient lab results sets after finalizing. For C-CDA it will import medications, allergies and problems.

Lab Results Processed: If Selected, lab has been processed and should not be reprocessed

Type of Document: Optional description of document

By clicking "Save and Start Reconciliation", you are merging patient data to your chart. If you miss something you can re-upload the CCDA file again and make changes.

Preview Important Clinical Document

Patient	Guy Bridges		
Patient Previous Name			
Date of birth	November 7, 1998	Sex	Male
Race	Native Hawaiian or Other Pacific Islander	Ethnicity	Not Hispanic or Latino
	Unknown		
Contact info	Primary Home: 4441 Adrianna Harbors Hills Dorchester, MD 21029, US Tel (Primary Home): +1(767)-175-7568	Previous Address	address not available
Preferred Language	Information not available		
Patient IDs	105150635 2.16.840.1.113883.3.7621		
Document Created	February 14, 2024, 09:49:33, EST		
Care provision	from December 9, 2022, 14:19:56, EST to February 14, 2024, 09:49:33, EST		

Learn more about [C-CDA Importing and Reconciling Patient Data](#).

