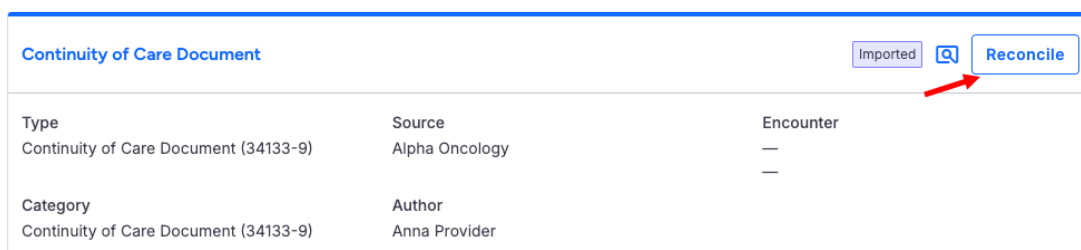# Reconcile Clinical Data with RecordSync

Last modified on 06/02/2025 9:34 pm EDT

Consolidated clinical document architecture (C-CDA) reconciliation matches information from a C-CDA file with a patient's electronic health record. This process can automatically start to reconcile problems, medications, and allergies, and merge this data with the patient chart.

1. Once a CCD has been successfully imported, the reconciliation process automatically begins. If the process doesn't start, select **Reconcile**. You can also select **Reconcile** when you view an imported CCD.
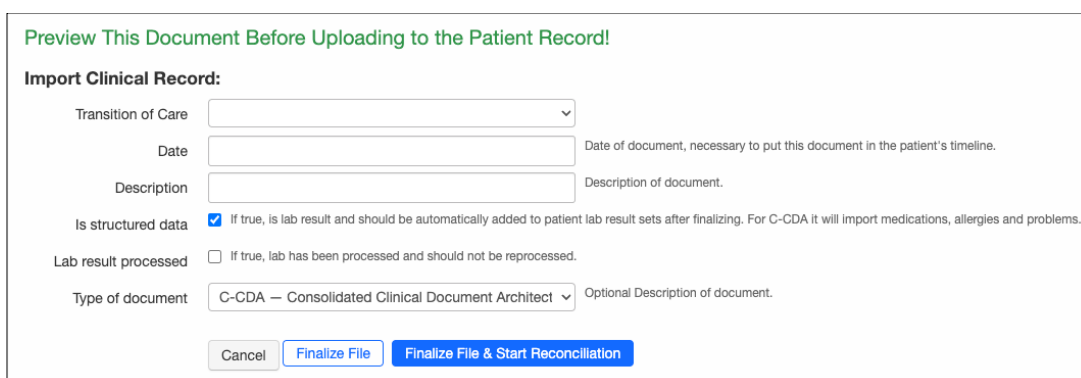

   The page to preview the clinical document opens.

2. Do one of the following:

   - To import the document to the patient chart and reconcile the clinical data later, select **Finalize File**. See Continue reconciliation.

   - To reconcile the clinical data now, select **Finalize & Start Reconciliation**. See Finalize and start reconciliation.

Finalize and start reconciliation

You can begin the reconciliation process by finalizing which problem, allergy, and medication data to merge into the patient chart. The problems, allergies, and medications in the C-CDA file appear below those currently in the patient chart.

> ℹ️ The following steps describe the procedure for problem data, but also apply to allergies and medications.

1. Select the checkboxes for the problems you want to add to the patient chart.

2. **(Optional)** Select **Preview Finalized Problems** to view the patient's problem list, which includes existing and newly added problems.

3. Select **Confirm** to import the selected problems to the patient chart. You can also select **Confirm** from the **Preview Finalized Problem List** page.

Back to Clinical Dashboard

Problem
Allergy   Complete
Medication

Current Patient Chart - Problem

Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
			No results				

C-CDA File - Problem

	Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
☐	Acute urticaria	ICD-10		402408009	Active	08/23/2019	01/30/2025	None
☑	Chronic idiopathic urticaria	ICD-10		302162004	Active	09/09/2019	01/30/2025	None
☐	Idiopathic urticaria	ICD-10		42265009	Active	06/21/2022	01/30/2025	None
☐	Urticaria	ICD-10		126485001	Active	08/19/2020	01/30/2025	None
☑	Allergy to mold	ICD-10		419474003	Active	07/10/2018	01/30/2025	None
☑	Allergy to animal dander	ICD-10		232347008	Active	07/10/2018	01/30/2025	None
☐	Mild intermittent asthma	ICD-10		427679007	Active	05/05/2020	01/30/2025	None
☐	Mild persistent asthma	ICD-10		426979002	Active	03/17/2020	01/30/2025	None
☐	History of calculus of kidney	ICD-10		429025008	Active	05/10/2018	01/30/2025	None
☐	Type 2 diabetes mellitus	ICD-10		44054006	Active	10/22/2019	01/30/2025	None

1–10 of 32 items   ‹ **1** 2 3 4 ›

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**

A success message appears confirming you have finalized reconciliation. All patient data has been successfully merged into the patient chart.

Continue reconciliation

1. On the **Clinical Dashboard**, select **Continue Reconciliation**.

The problems, allergies, and medications in the C-CDA file appear below the problems, allergies, and medications currently in the patient chart.

> ℹ The following steps describe the procedure for problem data, and also apply to allergies and medications.

2. Continue with step 1 in the finalize and start reconciliation procedure.