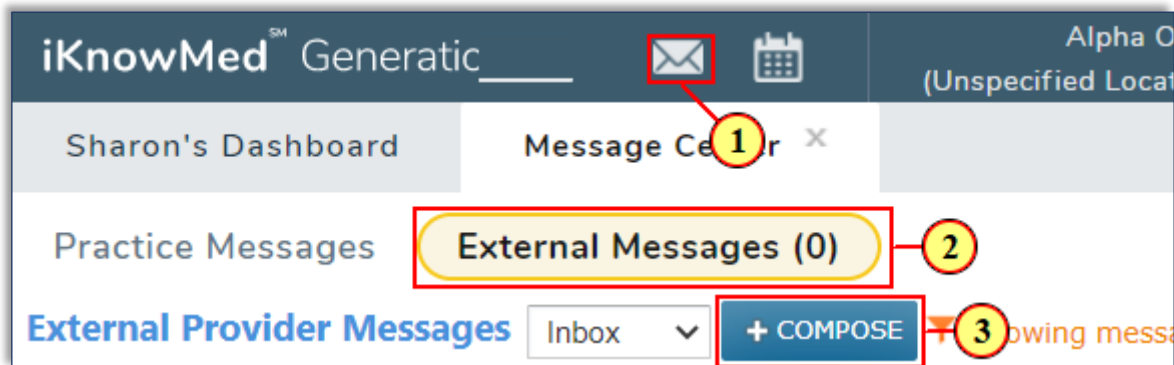



Send Summary of Care/CCDA

This lesson covers the required documentation for the **Promoting Interoperability measure: Send Summary of Care**.



1. Click  to open the mailbox.

2. Click **External Messages (0)**.

3. Clicking **+ COMPOSE** opens the **Compose Message** window allowing you to create and send a message to an external provider.

The **+ COMPOSE** button is available in all three message queues: **Inbox**, **Sent** and **Archived**.

4. The dropdown list in the **From:** field displays all available **Direct Message** addresses for the practice. Clicking on the address selects it. You can type the first initial of the provider's first name to more easily find the provider.

5. The recipient's **Direct Message** address can be typed manually in the field or populated by using the feature.

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6. You can search for a specific provider's **Direct Message** address by selecting the ☒ **Individual** checkbox or for a practice address by selecting ☐ **Institution** checkbox if the provider's name is unknown.

7. The displayed data fields allow you to enter additional information about the provider.

8. Clicking **SEARCH** will display a list of records matching the entered criteria.


Test DPT, Steven	Carolina Neurosurgery & Spine Assoc	225 Baldwin Avenue Charlotte NC 28204
TEST TABLE, TEST TABLE	Dekalb Medical Physicians Group	8225 Mall Parkway Suite 1100 Lithonia GA 30038

9. Clicking **SELECT** populates the provider's **Direct Message** address in the **To: field of the message header**.

10. Clicking on the line item from the populated list selects it.

11. Supporting documentation can be attached to the message by clicking **UPLOAD FILE...**

13. Entering the subject of the message in the **Subject:** * field completes the message header.

14. Clicking  will remove the document.
15. The message text is entered in the **Message Text:** * field.
16. Once attached, the document will display in the **Attachment(s):** section.

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Compose message * required

From: * --Please Select--

To: * TEST TABLE, TEST TABLE (charles.barclay.p1@direct.dmphysicia) SEARCH...

Patient: * Flower, Ivy (DOB:07/07/1977 / F / ID: zzflowerivy)

Subject: * referral

Attachment(s): UPLOAD FILE...

Message Text: * referral

☒ Outgoing Transition of Care Referral reason

☒ Attach CCDA Clinical summary
Clinical chart
Referral note

SEND MESSAGE


17. Selecting the ☒ **Outgoing Transition of Care** checkbox identifies the message as an **Outgoing Transition of Care** or referral.

This creates an **Outbound Patient Transition** record in the **Demographics** tab > **Patient Transfers** section.

18. A referral reason entered in the **Referral reason** field will display in the **Outbound Patient Transition** record in the **Demographics** tab.

19. Clicking ☒ **Attach CCDA** checkbox allows you to attach a **Clinical summary**, a **Clinical chart** or a **Referral note** to the message. All three of these documents meet the requirement for the Send Summary of Care measure, **one must be attached** to meet the requirements.

20. Clicking SEND MESSAGE adds the message to the **Sent** queue for delivery.

 After sending, check your external mailbox's **SENT** box to verify the message's status. A status of "**VERIFIED**" indicates the message was sent successfully. A status of "**FAILED**" indicates the message did not send and will not meet the numerator.

This concludes the lesson for the required documentation for the **Promoting Interoperability measure: Send Summary of Care**.