Receive and Inbound a Summary of Care/CCDA

In this lesson you will learn the required documentation for **inbounding a CCDA/electronic health information** portion of the **MIPS Promoting Interoperability Support Electronic Referral Loops by Receiving and Reconciling Health Information** measure.

It is the CCDA file that is part of the required documentation.

NOTE: To meet the full measure requirements, electronic reconciliation of problems, medications and allergies must also occur.

1. Click ✉ to open the mailbox.
2. Click **External Messages** to access received **CCDA/Direct Exchange Messages** .
3. Once an **Inbound CCDA/Direct Exchange Message** from an external provider is matched to a patient, its status changes to **Matched** and additional options become available allowing you to attach the CCDA and other documents to the patient's chart and create an **Inbound Transition of Care** record.
4. Select the message to inbound by clicking on it.

iKnowMed℠ Generation 2

5. The CCDA file can be identified by the **CCD** or **CCDA** in the file type.

6. Each attachment has a Preview option that opens the **Document Preview** window.

7. To create an **Inbound Transition of Care** click INBOUND TRANSITION OF CARE .

This adds the patient to the **denominator** for the Support Electronic Referral Loops by Receiving and Reconciling Health Information measure and will also record a new **Inbound Patient Transition** under **Demographics** > **Patient Transfers**.

8. The ATTACH TO CHART ... button allows attachment of the **CCDA** included in the **Direct Exchange** message to the patient's chart.

9. The **Date of Service** defaults to the date the message was received.

10. **Document Type** defaults to **CCDA.The document type must be CCDA to complete the Clinical Reconciliation.**

11. It is optional to add the CCDA to the Recipient's review queue. To assign for review check Requires review by and select the recipient.

NOTE: *Review is not required to meet the measure requirements. If checked the document must be reviewed by the recipient before electronic reconciliation can occur.*

12. To add a comment about the attachment, click at the beginning or end of the **Document Name / Comment / Notes** field and type your comments.

13. To add the **CCDA** to the chart, click **ATTACH DOCUMENT.**

Direct Messages sometimes include attached additional files or message text that may be added to patient's chart.

14. To view one of these attachments, click **Preview**.
15. To add an attachment to the chart, click **ATTACH TO CHART**.

iKnowMed℠ Generation 2

Attach document to chart   * required

Patient Name *
Billing, William (M/31 - 07/15/1989 - 07151989)

Date of Service *
05/27/2021

Document Type *

CCDA
CCDA
CT scan reports
Distress screening (scanned)
External Provider Message
External Provider Message
Labs
Legacy iKM Referral Note
OCM treatment plan
Oral

(16) (17)

☐ Requires review by

(18)

Source
Marcus.Welby@qaoncprac2.msh.direct-ci-cert.com

Document Name / Comment / Notes
From: Marcus.Welby@qaoncprac2.msh.direct-ci-cert.com Provider
(Welby, Marcus) has sent a message with Patient Documentation

(19)

ATTACH DOCUMENT | CA (20)

16. The **Date of Service** defaults to the date the message was received.
17. **Document Type** defaults to **External Provider Message.**
18. It is optional to add the document to the Recipient's review queue. To assign for review, check Requires review by and select the recipient.

19. To add a comment about the attachment, click at the beginning or end of the **Document Name / Comment / Notes** field and type your comments.
20. To add the **document** to the chart, click **ATTACH DOCUMENT.**

iKnowMed℠ Generation 2

21. If you would like to add the message text to the patient's chart, click **ATTACH MESSAGE TEXT TO CHART.**

22. The **Date of Service** defaults to the date the message was received.

23. **Document Type** defaults to **External Provider Message**.

24. It is optional to add the message to the Recipient's review queue. To assign for review, check Requires review by and select the recipient.

25. To add a comment about the attachment, click at the beginning or end of the **Document Name / Comment / Notes** field and type your comments.

26. Click **ATTACH MESSAGE TEXT.**

27. The **Date of Service** defaults to the date the message was received.
28. **Document Type** defaults to **External Provider Message**.
29. To add the **Message** text as a **Document** in the chart, click **ATTACH MESSAGE TEXT**.

iKnowMed℠ Generation 2

30. Once the **Inbound Patient Transition** record is created, the button becomes unavailable and changes to INBOUND TRANSITION OF CARE HAS BEEN CREATED to prevent creation of duplicate records.

31. Once the document is attached, the **Attach to Chart** button becomes unavailable and changes to DOCUMENT ATTACHED .

32. To move the message out of the Inbox queue, click **ARCHIVE**.

> This concludes the lesson for the inbounding electronic health information portion of the **MIPS Promoting Interoperability Support Electronic Referral Loops by Receiving and Reconciling Health Information** measure.
>
> **To meet the full measure requirements, electronic reconciliation of problems, medications, and allergies must also occur to meet the numerator.**
>
> For further steps, please refer to job aids: **Reconcile Problems Electronically, Reconcile Medications Electronically, and Reconcile Allergies Electronically**