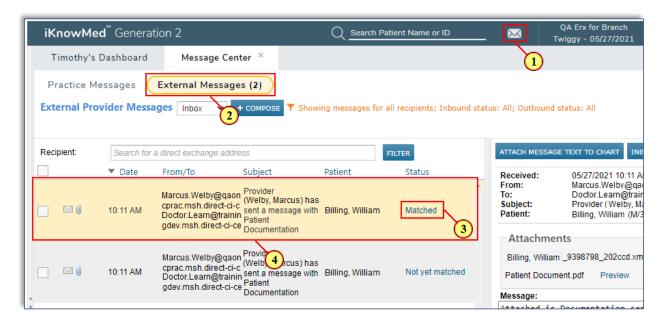
Receive and Inbound a Summary of Care/CCDA

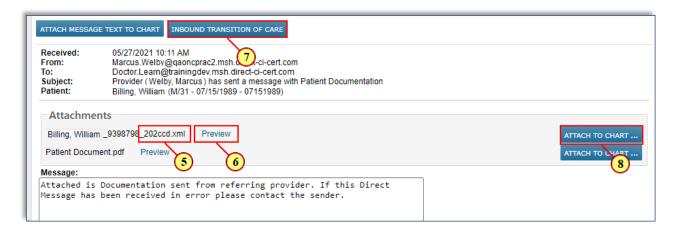
In this lesson you will learn the required documentation for **inbounding a** CCDA/electronic health information portion of the MIPS Promoting Interoperability Support Electronic Referral Loops by Receiving and Reconciling Health Information measure.

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.



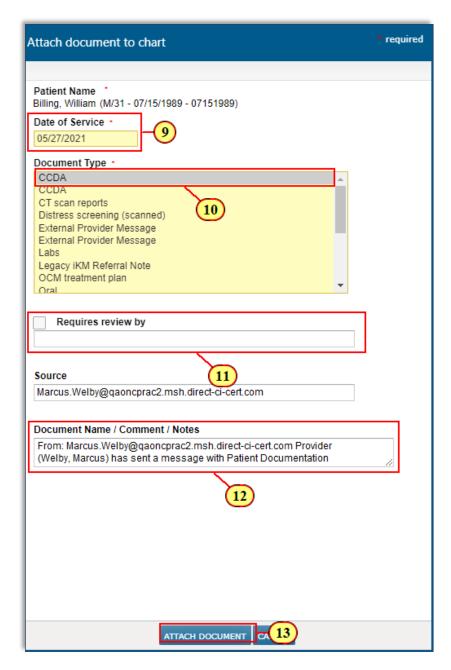
- 1. Click to open the mailbox.
- 2. Click External Messages to access received CCDA/Direct Exchange Messages.
- 3. Once an **Inbound CCDA/Direct Exchange Message** from an external provider is matched to a patient, its status changes to **Matched** and additional options become available allowing you 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.



- 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 <u>must be CCDA</u> 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.

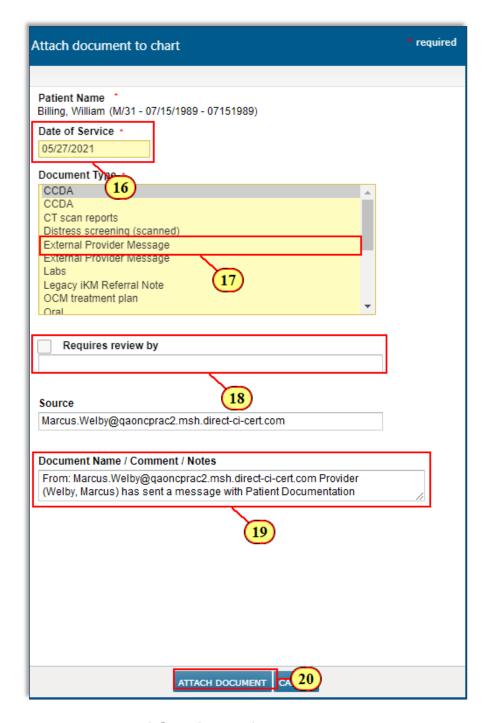
- 12. To add a comment about the attachment, click at the beginning or end of the **Document Name / Comment / Notes** field and type your comments.
- 13. To add the CCDA to the chart, click ATTACH DOCUMENT.



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



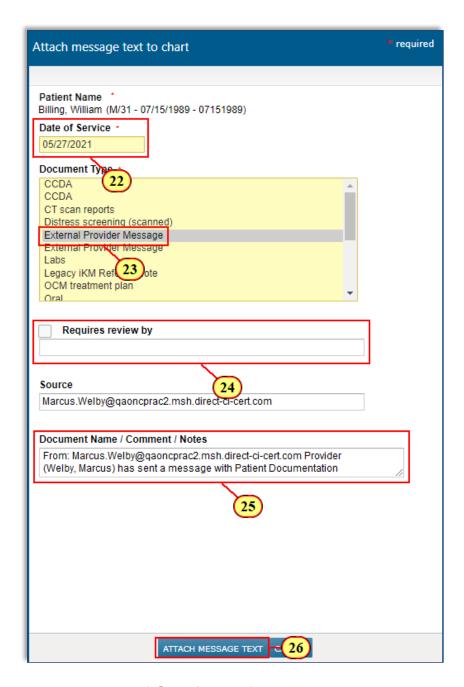
- 14. To view one of these attachments, click **Preview**.
- 15. To add an attachment to the chart, click ATTACH TO CHART.



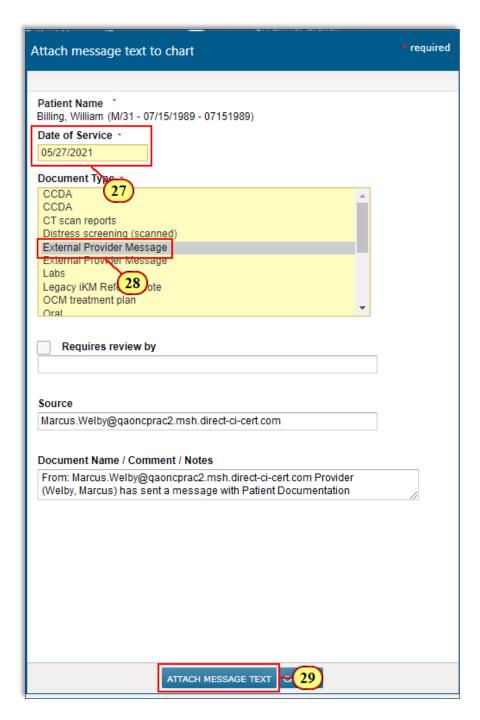
- 16. The **Date of Service** defaults to the date the message was received.
- 17. **Document Type** defaults to **External Provider Message.**
- 18. It is optional to add the document to the Recipient's review queue. To assign for review, check Requires review by and select the recipient.
- 19. To add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



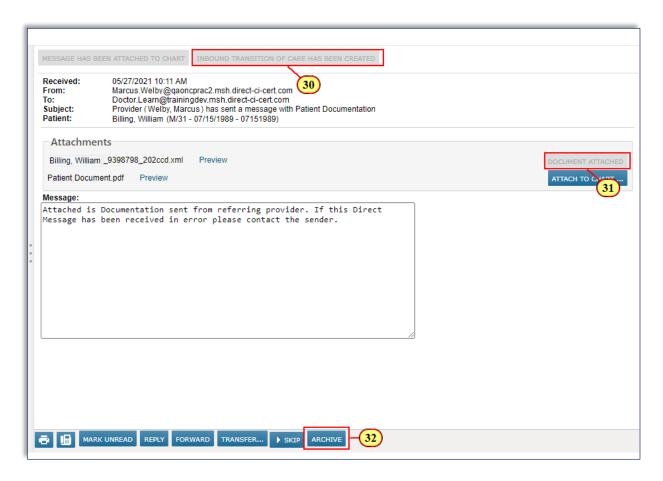
21. If you would like to add the message text to the patient's chart, click **ATTACH MESSAGE TEXT TO CHART.**



- 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**.



- 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