ChartMaker® Continuity of Care Document (CCD) Quick Reference Card

LOINC Code Mapping

Clinical

- Click the **Tools** menu option.
- Click **Code Mapper.**
- Click the **Loinc Mapping** tab **This tab should be the default.*
- On the left, in the **Show only** field, select **Conditions without Loinc Codes.**
- Select a **condition** from the list.
- On the right, in the **LOINC Number, Description** field, type the name of the condition selected in the previous step.
- Click **Link To.**
- Repeat these steps for all applicable conditions that need to be linked to a LOINC Code.
- When all conditions are associated to a LOINC code, click **Close.**

Patient Consent

Practice Manager

- Select the **Patient** tab.
- Type the **Account #** and press **Enter** or use the patient lookup to search for the patient.
- Click the **Consent** button.
- Set **Practice level Permissions**: In the **HIE Consent** section, double click the **Practice** name.
- Designate appropriate Consents by selecting **Yes** or **No** based on the patient's permission:
  Export Consent (default is Yes)
  Import Consent (default is Not Asked)
- Click **Save** in the Edit Consent Screen.
- Click **OK** in the Consent Screen.
- Click **Save** on the patient's account.

Clinical

- Open a **Patient Chart.**
- Click the **ID** tab.
- Click the **Consent** button.
- Set **Practice level Permissions**: In the **HIE Consent** section, double click the **Practice** name.
- Designate appropriate Consents by selecting **Yes** or **No** based on the patient's permission:
  Export Consent (default is Yes)
  Import Consent (default is Not Asked)
- Click **Save** in the Edit Consent Screen.
- Click **OK** in the Consent Screen.
- Click **Save** the patient's chart.

NOTE: Set **Provider level Permissions**: If Provider's within the Practice DO NOT share the same permissions as the Practice level, double click the desired provider's name and make the appropriate changes. If different permissions exist the value under the Practice level will display as **Various**, instead of **Yes** or **No**.

Export CCD Data to a Health Information Exchange (HIE)

Clinical

- CCD data is sent automatically with no intervention on the user's part. The act of signing a clinical note by a Provider will generate and queue the CCD information to send to the HIE.

NOTE: An NPI number is needed to generate and send the CCD message to the HIE. If a user has signing privileges, and they sign the clinical note on behalf of the Provider, that patient's CCD will not be sent.

Import CCD Data from a Health Information Exchange (HIE)

Clinical

*These steps are completed outside of a patient's chart.

- Click the **Chart** menu option.
- Click **Import.**
- Click **From HIE.**
- In the **Select patient** field, type the last name of the desired patient, and then in the list below **Highlight** the applicable patient.
- Check the **This patient has been transferred or referred to provider or has not yet seen the provider** checkbox to track whether the patient has been transferred, referred, or never seen by the provider. When this option is selected, it will be counted toward any applicable meaningful Use and MIPS performance measures.
- Select **Next.**
- Select **Finish**.
- The requested data will now download, and the **Patient Summary Document** will then open in the patient's chart.

NOTE: Not all HIE's have the ability for document retrieval. If you are unsure if your HIE has this capability, please call our Support Department at 800-487-9135.

ChartMaker® Continuity of Care Document (CCD) Quick Reference Card

Import Errors

Patient Not Found Error

- If the patient is not found in the HIE's database, the following HIE import error will be returned:

  "There are no patients matching your search criteria registered with the HIE. Please try again."

- Select **OK.**

Import Consent Error

- If the import consent flag was recently set to **YES** and the import from the HIE is attempted immediately, it is possible you may receive the following error:

  "The registration for this patient on the selected HIE is still in process. Please try the import again after a few minutes."

- Select **OK.**

Optional Setup

These steps are only required by certain HIE's

Procedure Mapping

NOTE: This step is only required if the HIE requests your office to send specific CPT4 codes in the CCD document to help track Quality Measures.

For example, an HIE will keep track of Eye (2022F) and Foot (2028F) Exams. For these two procedure codes to be sent within the CCD document the office will need to perform the following steps:

- In Clinical, click the **Tools** menu option.
- Click **Code Mapper.**
- Click the **Procedure Mapping** tab.
- On the left, in the **Show only** field, select **Conditions without Procedure Codes.**
- Search for your CPT4 description.

  TIP: To search by procedure code, change the **Search Column** field to **Procedure Code** instead of Description.

- On the right, search for the **procedure** description or code entered in the previous step.

  NOTE: Change the **Search Column** to reflect the applicable criteria (code or description), if necessary.

- Highlight the desired **code.**
- Click **Link To.**
- Repeat these steps for all applicable conditions that need to be linked to a procedure code.
- When all conditions are associated to a procedure code, click **Close.**

Original Exam Date

NOTE: This step is only required if the HIE requires the original exam date.

For example, if a patient tells the provider they had an eye exam on 10/1/15, the provider should select the procedure code in the office note and change the *Order Date* to the 10/1/15 date. Typically, a procedure checklist is used in a template to document health maintenance items such as eye exams, mammograms, EKG's, etc.

- In Clinical, open the applicable **chart note.**
- Open the applicable procedure checklist by clicking the **Open Procedure Checklist** icon.
- Select the desired **procedure.**
- In the **Order Procedure** dialog, set the **Order Date** field to reflect the desired date.