

How to Complete PowerChart Clinical Reconciliation for Ambulatory Clinical Staff

Clinical Reconciliation is the process of verifying clinical data that exists within the EMR is consistent with external sources.

The **Ambulatory Workflow** contains the Problems, Procedures, Allergies, Home Medications, and Immunizations that need to be reviewed with the patient/family office intake process.

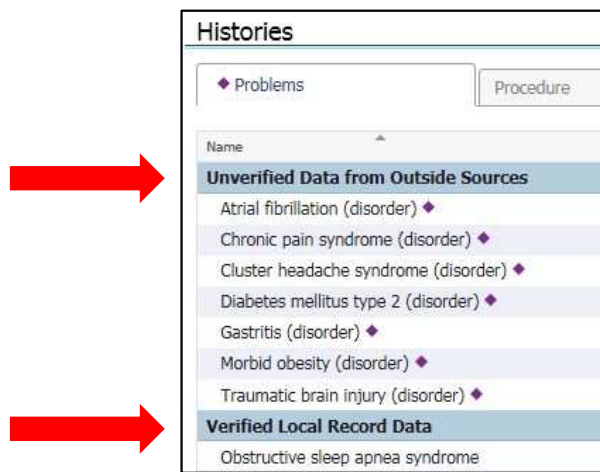
Outside records (external sources) such as CCDs (Continuity of Care documents) will be imported into the chart by appropriate office staff. **Purple diamond** icons indicate outside records/sources are present.

Go to the Ambulatory Workflow:

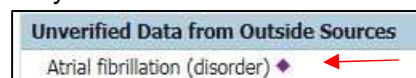
1. Histories

A. Problems tab

- **Unverified Data from Outside Sources** will display **purple diamond** icons.
- **Verified Local Record Data** will contain current data from within Munson Healthcare records.



- a. Once the patient/family have verified or denied the problem, click the **Problem**.



- b. Click **Add** if verified or **Decline** if denied.



- **Add:** adds the problem to the problem list.
- **Decline:** Removes the problem from the list.

- c. Continue through the list of problems. Leave any problems (**purple diamonds**) you are not certain of. The provider is ultimately responsible for management of the problem list.

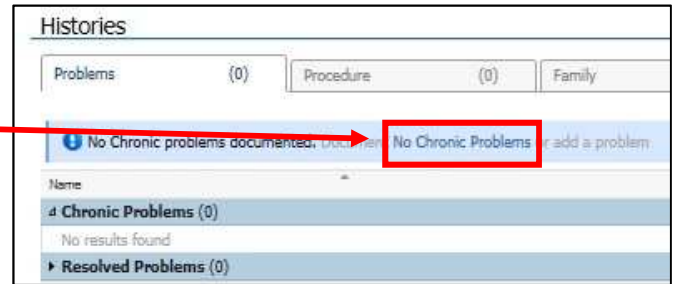
- d. Click **Complete Reconciliation**.

*****Never use Finish Later*****



When No outside records (no purple diamonds) are present, reconciliation must still be completed:

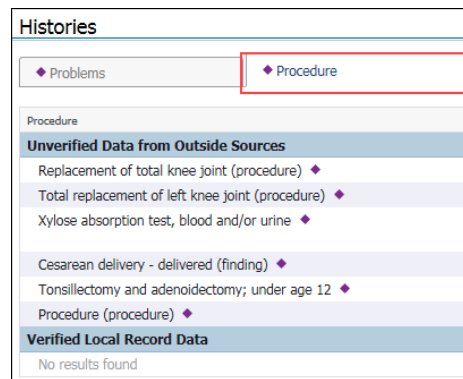
- a. When the patient has no chronic problems listed, click **No Chronic Problems**.



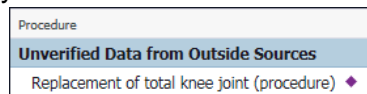
- b. Click **Complete Reconciliation**.



B. Procedures tab



- a. Once the patient/family have verified or denied the problem, click the **Procedure**.

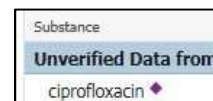


- b. Click **Add** if verified or **Decline** if denied.

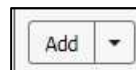


2. Allergies

- a. After discussing with the patient/family, click **Substance**.

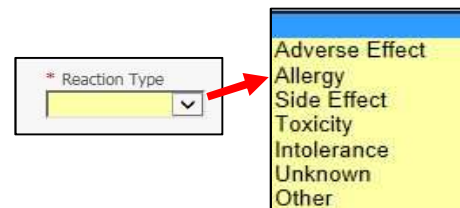


- b. Click **Add**.



- When the allergy is not accurate, click **Decline**. The allergy will be removed from the list.

- c. Scroll down to required **Reaction Type**, click the drop down arrow. Select **Reaction Type**.



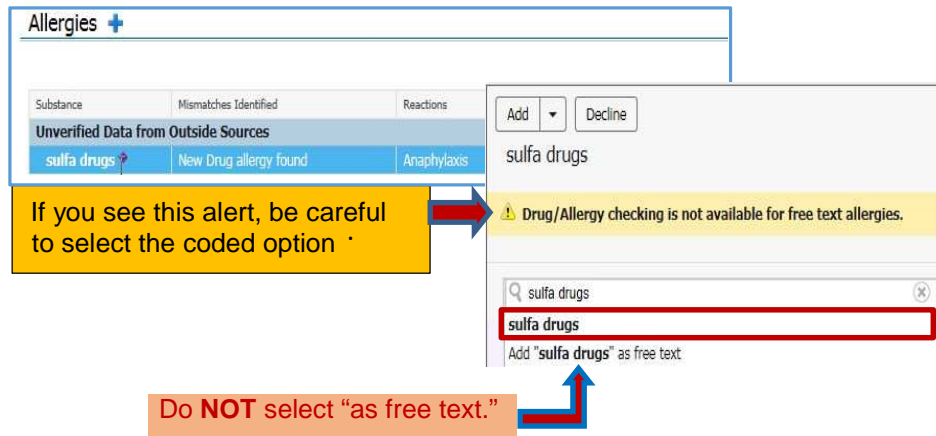
- d. Click **Save**.



- e. **Continue** through the list of allergies to Add, Decline, or leave remaining purple diamonds you are uncertain of.
- f. Click **Complete Reconciliation**.

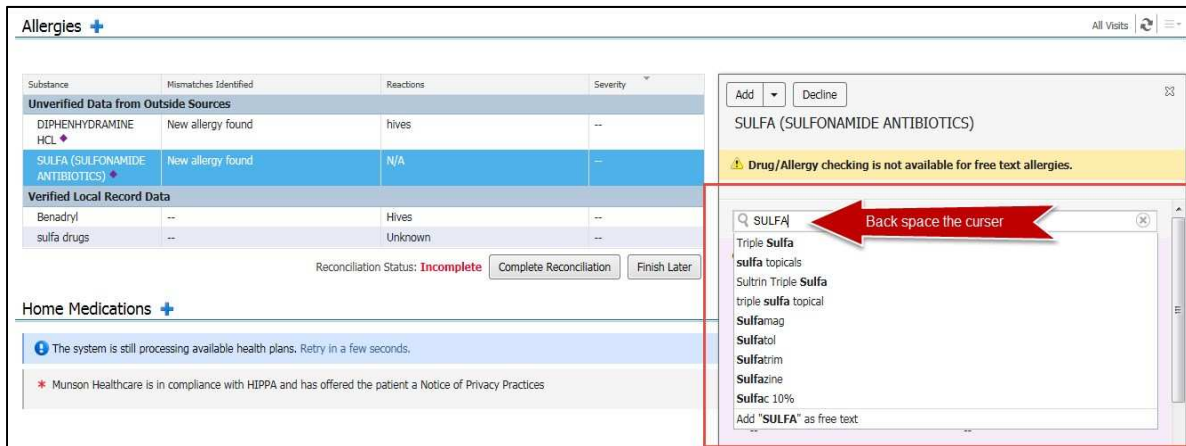
Reconciliation Status: **Incomplete** Complete Reconciliation

NOTE: Never select a 'free text' allergy choice. Always select a coded option.



The screenshot shows the 'Allergies' section with a table of 'Unverified Data from Outside Sources'. A yellow alert box states: 'Drug/Allergy checking is not available for free text allergies.' Below the table, a search field contains 'sulfa drugs' and a dropdown menu shows 'sulfa drugs' as a coded option. A red box highlights the 'sulfa drugs' option, and a red arrow points to it with the text 'Do NOT select "as free text."'.

When only a free text option appears: Place your cursor in the search field and start to backspace out the imported description. Suggestions will begin to display. Select the desired allergy.



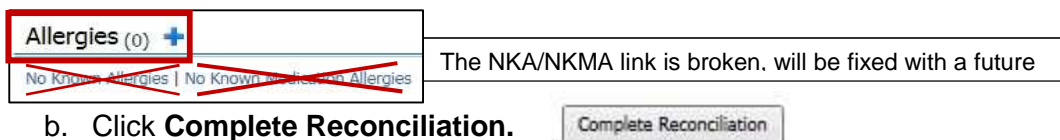
The screenshot shows the 'Allergies' section with a table of 'Unverified Data from Outside Sources'. A search field contains 'SULFA' and a dropdown menu shows suggestions: 'Triple Sulfa', 'sulfa topicals', 'Sultrin Triple Sulfa', 'triple sulfa topical', 'Sulfamag', 'Sulfatol', 'Sulfatrim', 'Sulfazine', 'Sulfac 10%', and 'Add "SULFA" as free text.' A red arrow points to the search field with the text 'Back space the cursor'.

When the patient has no known allergies:

- a. Click **Allergies title/blue plus**, to enter NKA.

When the patient has environmental or food allergy, but no known medication allergies:

- a. Click **Allergies title/blue plus**, to enter No Known Medication Allergies.





The screenshot shows the 'Allergies' section with a link 'Allergies (0) +'. Below the link, there are two crossed-out links: 'No Known Allergies' and 'No Known Medication Allergies'. A text box states: 'The NKA/NKMA link is broken. will be fixed with a future'. Below the link, there is a 'Complete Reconciliation' button.

If patient does have allergies to be entered, click the **blue plus** and enter as you do today.

Allergies (0) +

3. Home Medications

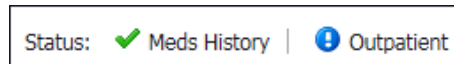
- a. **Purple** diamonds will not display in the home Medication section at this time. Currently documented Home Medications will display.

Medication	
	Lasix 20 mg oral tablet 1 Tab, Oral, Daily, 30 Tab, 0 Refill(s)
	lisinopril 10 mg oral tablet 1 Tab, Oral, Daily, 30 Tab, 0 Refill(s)

- b. To complete the documentation medication by history process, click **Complete History**.



- c. Complete the entry of the patient's home medications as you do today.
- d. The Reconciliation Status bar will display a green checkmark to indicate home medication entry has been completed. This meets the regulatory requirement for entering home medications.



- e. The following indicates the entry and reconciliation of home medications has been completed.



4. Immunizations

- a. After verifying with the patient/family, click **Vaccine**.

- b. Click **Add**.



- When the immunization is not accurate, click **Decline**. The immunization will be removed from the list.

NOTE: There is no reconciliation button for Immunizations.

When no outside vaccinations exist, the bi-directional query will present for this component. No action needs to be taken.

Immunizations +	
Status	Vaccine
Overdue	Pneumococcal Polysaccharide
Overdue	Tetanus-Diphtheria
Overdue	Zoster
In Range	Influenza
History (10)	
Aged Out	Diphtheria, Tetanus, and Pertussis
Aged Out	Haemophilus Influenzae Type B

NOTE: Once reconciled, click **View Outside Records** to see remaining outside records as indicated by purple diamonds that were not added or declined during the admission process.

