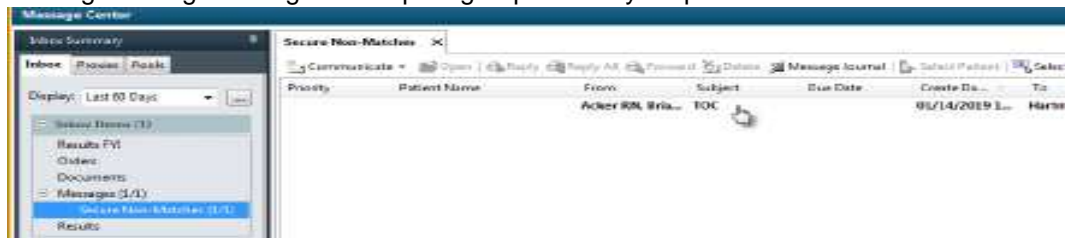


Receiving & Matching a Summary of Care or CCD (from an outside source)

Hello, and welcome to today's educational recording on the best practice workflow steps to incorporate and save a summary of care or Continuity of Care (CCD) document from an outside source into a patient's record.

1. To begin, navigate within Powerchart to 'Message Center'
2. Within the left inbox summary pane, navigate to 'Messages' or go to the Pools if your practice is utilizing message routing rules to pool groups within your practice.



3. Double click on the message
4. Select the 'Patient Match' button

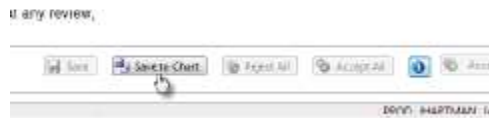


5. If a patient does not auto match based on demographics, match the patient, using the SEARCH button and complete the appropriate fields to search. Select an encounter, to save information too.

A screenshot of the 'Patient Match' dialog box. It shows 'Externally Provided Demographics' for a patient named 'ZZZZREVCYCLE, AMB T...'. Below, it lists 'Possible Matches' with two entries: 'ZZZZREVCYCLE, AMB T...' and 'FORD, ANDREW TIMOTHY...'. At the bottom, there's a table of 'Encounters for Selected Patient'.

****** If a patient does not exist, the practice must follow the steps to add a new patient into the system from within RevCycle. Once the patient has been added and an encounter associated to that patient, you may follow the steps above.

- When complete, select the 'Save to Chart' button. This will save data into the patients' record under '**Outside Records**'. This is so that the information can be reconciled into the patients' electronic health record via the clinical reconciliation process.



To view where this data lives until the reconciliation process can be completed, open the patient's chart, and from the menu band, navigate to Outside Records.

- Clicking on the blue hyper link will allow you to view the information
- Selecting the check box will allow that information to be saved into the chart for reconciliation. Select the check box and 'Save to Chart'. Data will be in the chart with 'Purple Diamonds' to be reconciled and added as necessary

Follow reconciliation process by reviewing the educational recording to complete the final steps and reconcile data into the patients chart. (see: clinical reconciliation recording)

