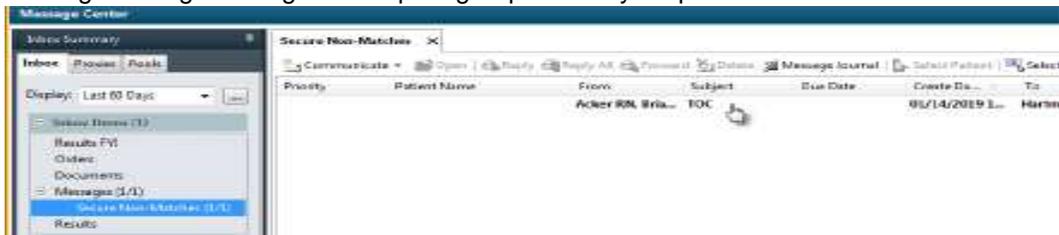


Receiving & Matching a Summary of Care or CCD (from an outside source)

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.

Patient Match

Externally Provided Demographics

Name	Birth Date	Sex	Phone	Address	City	State	Zip C.
ZZZZREVCYCLE, AMB T...	12/01/2002	Male					

Patient Match

This message is not currently matched to a patient.

Possible Matches

Weight	Name	Maiden Name	Birth Date	Sex	MRN	Phone	Address	City	State	Zip C.
100	ZZZZREVCYCLE, AMB T...		12/01/2002	Male	A4004140...		5132 MATTHEW DR	TRAVERS...	MI	49684
50	FORD, ANDREW TIMOTH...		12/01/2002	Male	M0708062	2315344829	400 W ELEVENTH ST	TRAVERS...	MI	49684

Encounters for Selected Patient

Facility	Nurse Unit	Reg Date	Disch Date	Enc Type	FIN	Medical Service
MMC	MMC Other	12/14/2018 11:00	12/14/2018 23:59	NSR (No Service Re...	M1834801263	NSR (Q/P-NO SERVICES)
Traverse Heart & Vascular - C...	Traverse Heart...	12/12/2018 09:00		Hospital	A0054023099	
Kalkaska Medical Associates	Kalkaska Medi...	12/11/2018 7:00	12/11/2018 23:59	Clinic	A0054020086	
Traverse Heart & Vascular - TC	Traverse Heart...	12/06/2018 09:00		Phone Message No...	A0054010049	
Traverse Heart & Vascular - TC	Traverse Heart...	12/05/2018 13:00	12/05/2018 23:59	Clinic	A0054000423	

** 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.

6. 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)

