Data Migration of Clinical Patient Information for Chart Preparation for Clinical Staff

Data migration is done as part of the preparation for patient visits and should be completed on all patient charts until all patient data has been migrated from the legacy electronic health record (EHR) into Cerner PowerChart. Review the legacy EHR for verification of data.

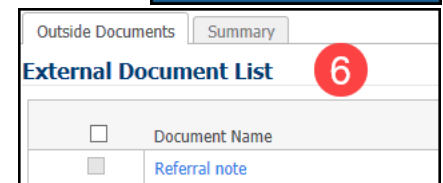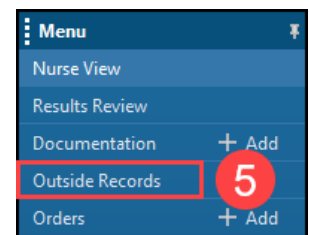## Data Migration of Clinical Patient Information

Open Outside Records

1. Open PowerChart and navigate to the Ambulatory Organizer.
2. Select or search for and select the correct Resource.
   a. Click the Resource or No Resource Selected next to **Patients for**:
   b. Enter the resource (provider name) in the search field.
   c. Check the box next to the Resource name.
   d. Click Apply.
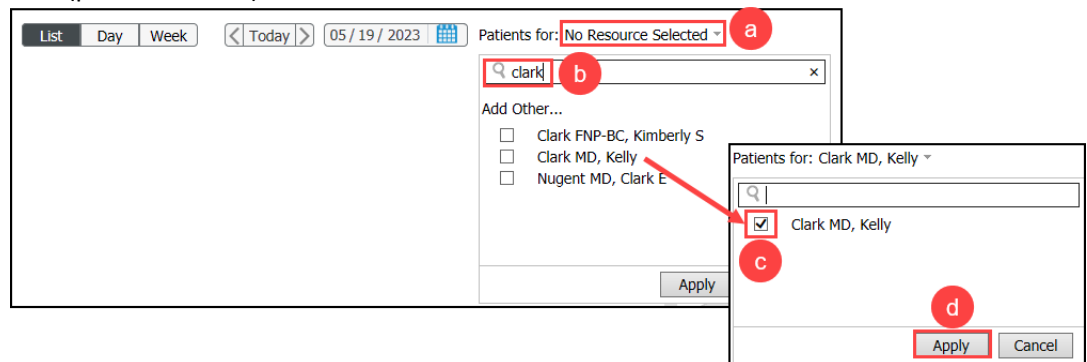
3. Check to see if there is a comment noted for the visit, as indicated with a paperclip note icon. Click on the icon to see the comment(s). If data migration is noted as complete, no additional migration is needed.

4. If there is no comment note attached to the chart, click on the Patient Name to open the patient's chart.
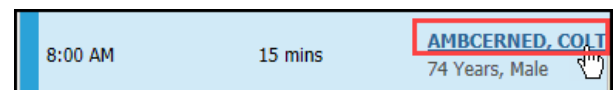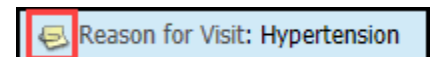

5. Open the Table of Contents PowerChart Menu and select Outside Records.

6. External Documents confirmed from CommonWell will display.
   a. CommonWell is a cloud based nationwide alliance that allows the clinician to request patient information from an outside source and incorporate it into the local EHR. Outside sources may include other hospitals, clinics, and provider offices that belong to the alliance.

7. Review the patient's CommonWell Enrollment status. All patients are auto enrolled by the system when registered at MHC facilities. Not Enrolled appears if patient demographics do not match exactly (patient has a new address or phone number, etc.).
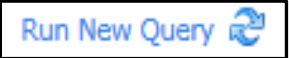
8. If **CommonWell: Enrolled** displays, click the query button located under CommonWell: Enrolled.
    a. This will load any new documents within outside records with data available for reconciliation.
9. If **CommonWell: Not Enrolled** displays, manual abstraction of clinical data from the legacy EHR is required. Stop and go to the legacy EHR standard work.
10. If **CommonWell: Not Enabled** displays, stop and call the Help Desk. An IT representative will reset your preferences. Proceed to step 8 once resolved.
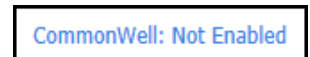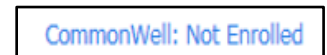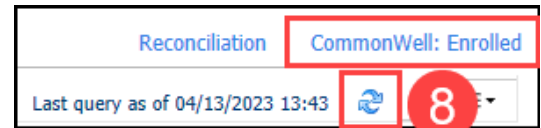
11. If **CommonWell: New Sources** displays and the patient or caregiver can confirm, click on the CommonWell: New Sources link.
    a. Sources to Confirm tab displays.
    b. Verify the patient has received care at the listed **Source** with the patient or caregiver.
    c. Click **Confirm** to make the document available for viewing.
   d. Click **Remove** if the patient denies care; or skip if the patient is unable to confirm.

    e. Click **Close**.

    f. Return to the Outside Documents tab in Outside Records and click **Run New Query**.

- For more information on CommonWell, refer to the Clinical EHR Education website.
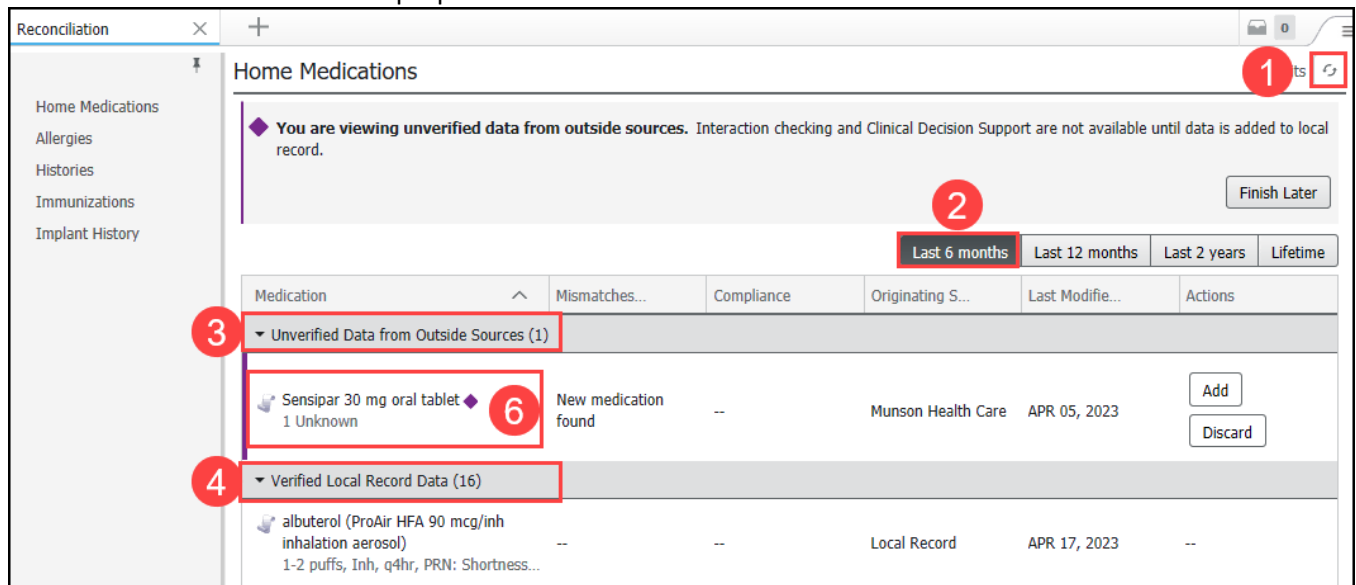
Outside Records Reconciliation View
1. Click on the blue Reconciliation hyperlink.
    a. Available outside data will display in the following Components: Home Medications, Allergies, Histories, Immunizations, and Implant History.
    b. **Note:** If an Error Occurred message displays, click Close and continue.
2. Add information from Outside Sources for each component as directed in the instructions below.
3. True reconciliation occurs at the time the patient presents for their appointment. For data migration, **DO NOT** click Complete Reconciliation unless completing this work at the patient appointment. Import the data and close the Reconciliation view page when you are done by clicking the **X** in the upper right corner of the screen.
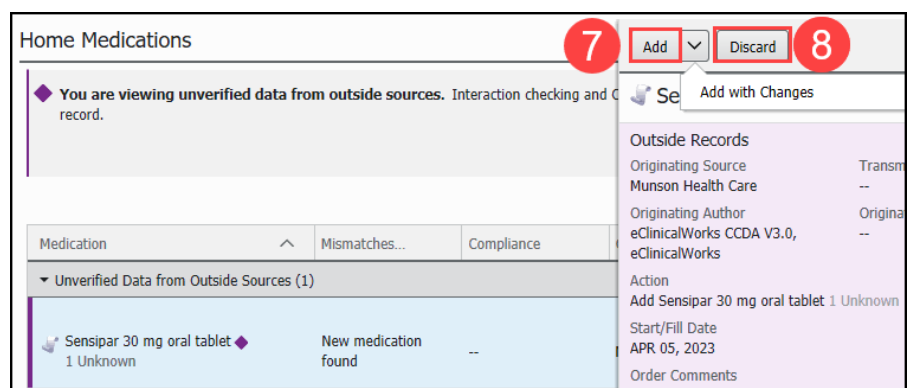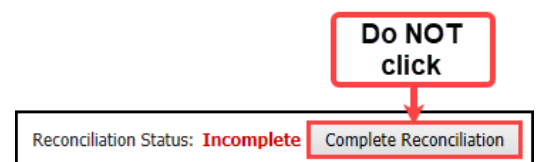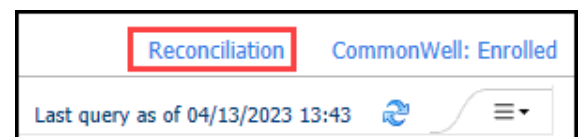
Home Medications

1. Click on the refresh icon for each component before migrating data.
2. Verify the time frame view filter of the **Last 6 months** is selected.
   a. **Note**: Each component may have time frame filters that may need to be adjusted to display Unverified Data from Outside Sources.
3. Unverified Data from Outside Sources section displays data from external documents as indicated with purple diamond icons.
4. The Verified Local Record Data section displays active items already in PowerChart.
5. Reference the patient's home medications in the legacy EHR (using a printed copy or by logging into the legacy EHR) to verify the correct medication, dose, route, frequency, and duration when reviewing and selecting medications from the list of Unverified Data from Outside Sources.
6. Click on each Medication with a purple diamond.

7. Select **Add** to add the medication to the patient's home medications.
   a. **Note**: **Never select free text when entering a medication**. Always select a coded Cerner Multum drug option. A search may need to be done to locate the coded Cerner Multum drug. Drug/Allergy checking is NOT available for free text medications. See step 9 for instructions.
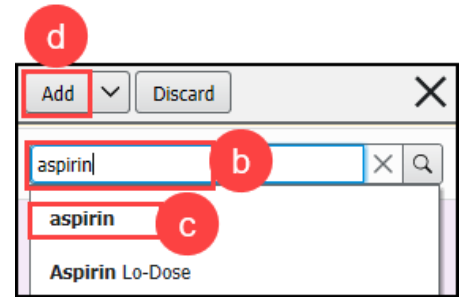8. Select **Discard** if the medication is already listed in the Verified Local Record Data.
   a. This will remove the medication from the Unverified Data from Outside Sources without adding the medication to the patient's chart.

9. To search for a Cerner Multum drug:
    a. Click in the search field.
    b. Retype the medication name to display a list of options.
    c. Select the correct medication.
    d. Click Add.
    e. If an **exact match is not found** in the Multum drug options, leave the medication as unverified and move on to the next one; this will be addressed at the time the patient presents for their visit.
10. Complete steps 6-8 for each medication with a purple diamond.
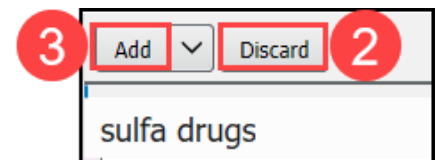
Allergies

1. In the Allergies component, click on each substance with a purple diamond.
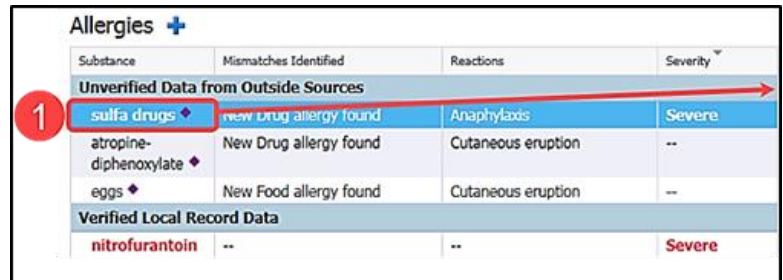
2. Select **Discard** if the allergy is already listed in the Verified Local Record Data. This will remove the allergy from the Unverified Data from Outside Sources without adding the allergy to the patient's chart.

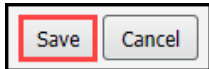3. Select **Add** to add the allergy to the patient's verified allergies.

    NOTE: Never select free text when entering an Allergy. **Always select a Multum option**. Drug/Allergy checking is **NOT** available for free text medication allergies. A search may need to be done to locate the allergy.
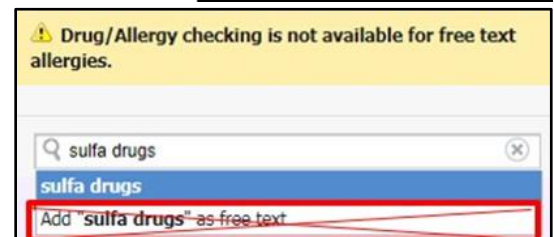
4. Complete each required field:
    a. Category.
    b. Reactions.
    c. Click the down arrow to select the Reaction Type.
    d. If the reaction is unknown, type **Unknown** in the Reactions field, scroll and select **Add "unknown" as free text**.
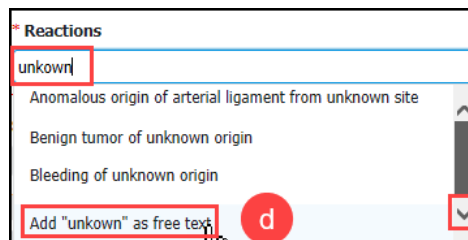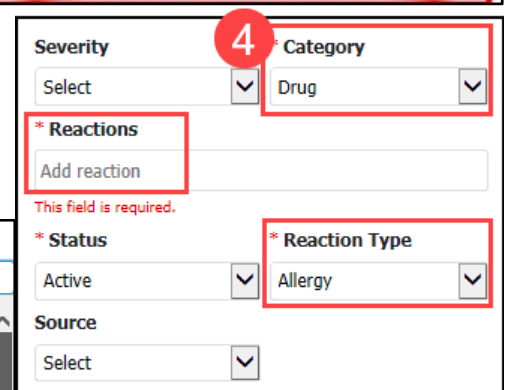
5. Click Save.

6. If the mCDS (drug/allergy) alert opens during an allergy import, select free text option as the override reason and type "Abstracted data without clinical review" in the reason field.

Histories

1. In the Histories component, Unverified Data from Outside Sources may be presented with purple diamond icons in the **Problems** tab, indicating they need to be reconciled. It is recommended to import the last 2 years of problems.
2. Change the time frame filter to **Last 2 years**.
3. Click on each unverified Problem with a purple diamond.
4. Select **Add** to add the problem to the patient's chart.
   a. **Note:** Do not add a history if it is an exact duplicate
5. Select **Decline** if the problem is already listed in the Verified Local Record Data. This will remove the problem from the Unverified Data from Outside Sources without adding the problem to the patient's chart.
6. Complete steps 1-5 for each unverified Problem with a purple diamond.

Immunizations

1. Navigate to the Immunizations component.
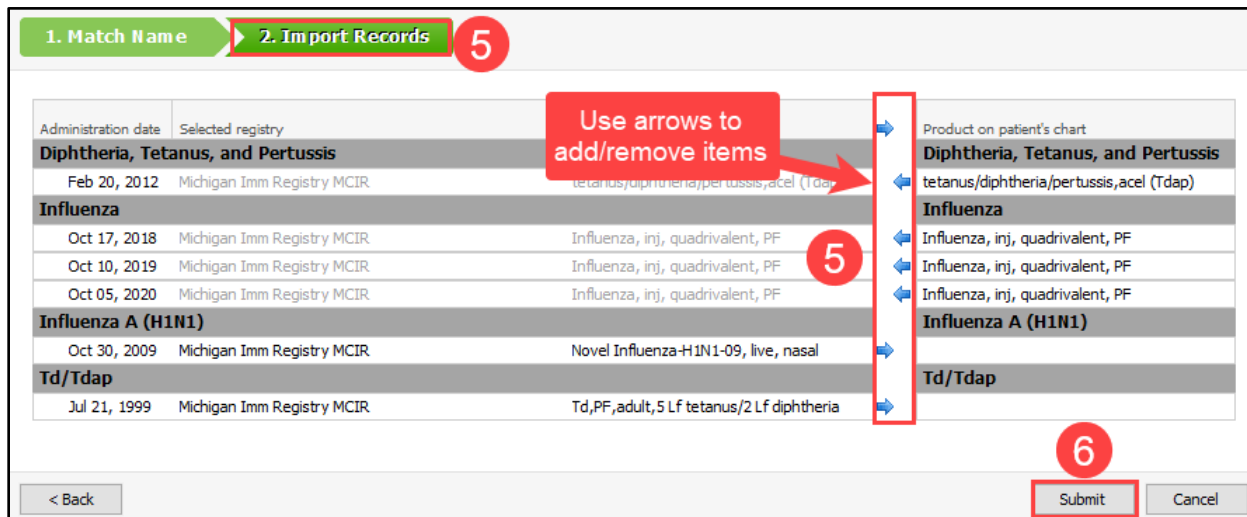2. Click Import.

3. Select the check box for the correct patient within the Registry Import window.
4. Click Load Records.

5. On the Import Records tab, click on the arrows going from left to right to migrate immunization data from MCIR to PowerChart.
   a. **Note**: Click the top blue arrow to migrate all available immunization data from MCIR to PowerChart.

6. Click Submit.

After completing the data migration process:

1. Close the Reconciliation View by clicking the X in the top right corner. (You will still be in Outside Records).
   a. **Note**: **DO NOT** click Complete Reconciliation unless completing this work at the patient appointment.
2. Click the Home button on the top toolbar to navigate to the Ambulatory Organizer.
3. Locate the correct patient that data was migrated for.
4. Click on the add Notes icon.
5. Enter "Data Import Complete" (and any other applicable notes) in the Comments field.
6. Click Save.
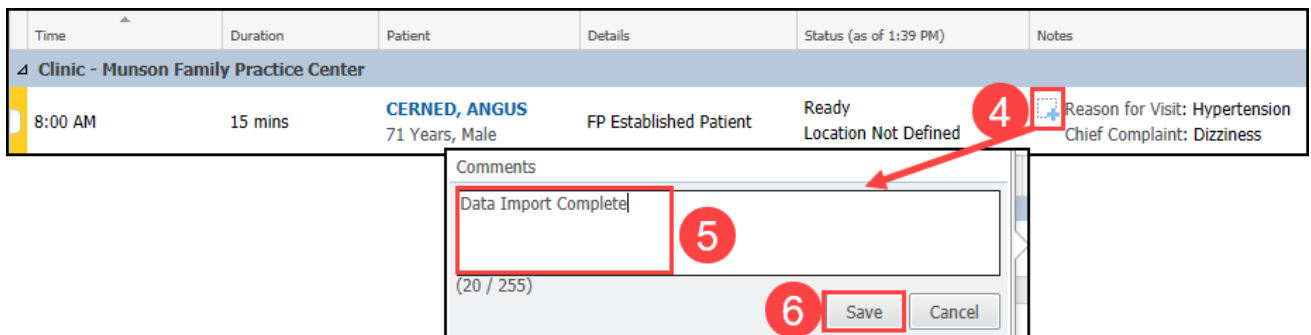
7. Notes are accessed by clicking the paperclip icon displayed next to the Reason for Visit.