

WellSky[®] Hospice and Palliative

Interoperability Features – Secure Patient Information Exchange

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Revision History

Last Update	Release Date	Release Version	Revision Description
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March 1, 2021	Not applicable	Not applicable	General updates
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Introduction

This guide provides an overview of the interoperability features for secure patient information exchange in WellSky[®] Hospice and Palliative. Functionality in this area may be enhanced by periodic updates. Please review Release Notes, and attend pre-release training, whenever an updated version is released. For more information go to HELP > Reference documents or Training videos.

Access and Permissions

If your agency would like to use the interoperability features, contact <u>support@consoloservices.com</u> to activate them.

Each agency will add permissions for their staff to use these features by completing these steps.

- 1. From the top navigation bar, click ADMIN > Roles.
- 2. Either edit a role or create a new one.
- 3. In the **Direct Secure Messages**, **Office Documents**, and **Patient Imports** categories, select the appropriate permissions.
- 4. Click **Update** or **Create**.

For information about roles, go to HELP > Reference documents and search for *Role Administration and Permissions* guide.

Interoperability Overview

Per the Centers for Medicare and Medicaid Services (CMS), agencies that have certified electronic health record technology (CEHRT) can share patient health information if needed. These features in WellSky Hospice and Palliative permit this exchange.

- Standard Formatting The patient's information can be compiled into a Consolidated Clinical Document Architecture (CCDA) document. CCDA is based on a <u>standard format</u> and common data set so providers can easily exchange patient information for continuity of care.
- Direct Secure Messaging A patient's information can be sent, in CCDA format, via <u>secure</u> <u>messaging</u> to another health care provider or entity. The information sent is either a Continuity of Care or Referral Note document. See <u>Document Types</u>.
- **Reconciliation** Information received from other providers, in CCDA format, is reconciled then <u>imported</u> into the patient's medical record and can then be reviewed by the team.
- Patient Portal In the portal, the patient and their representative can view the patient's medical information. They can also download or send their information, in CCDA format, to another provider or other recipient. For information about the Patient Portal, go to HELP > Reference documents and search for *Patient Portal*.

Standardized Formatting

Medical record information can be exchanged in CCDA format via direct secure messaging, reconciliation, and patient portal. CCDA documents contain a Common Clinical Data Set (CCDS) that emphasizes interoperability and helps providers more easily exchange patient information for continuity of care. See the <u>2015 edition certification companion guide</u> to learn more about the CCDS definitions and regulations.

Data Included in the CCDA Export

The information included in the CCDA export document varies. In WellSky Hospice and Palliative, you can export the patient's Electronic Health Information (EHI) using the Continuity of Care and Referral Note <u>documents</u>. Certain data are required for both documents, and each has additional requirements. As part of the CCDS (2015 Edition) standards, both documents contain the following required information.

- Patient name
- Sex
- Date of birth
- Race
- Ethnicity
- Preferred language
- Smoking status
- Problems
- Medications
- Medication allergies
- Laboratory tests, values, and results
- Vital signs
- Procedures
- Care team members
- Immunizations
- Unique device identifiers for patient's implantable devices
- *Assessment and plan of treatment
- *Goals
- *Health concerns

*These items are found in the Visit Note clinical charting section.

Continuity of Care – Additional Data Elements

In addition to the <u>CCDS</u> information, the following are also required in a <u>Continuity of Care</u> document.

- Encounter diagnosis (SNOMED CT or ICD-10-CM)
- *Mental status (no coding just text)
- **Functional status (no coding just text)
- Ambulatory setting (no coding just text)
 - o Referral reason and the referring provider's contact information

*From the Psychiatric Assessment | **From the Musculoskeletal Assessment

Referral Note – Additional Data Elements

In addition to the <u>CCDS</u> information, the following are also required in the <u>Referral Note</u> document to enable patient-specific matching for the receiving party.

- First name
- Last name
- Middle name
- Previous name
- Suffix
- Date of birth
- Address
- Phone number
- Sex
- Reason for referral

View, Download, and Transmit – Specific Elements

The following View, Download, and Transmit (VDT) elements are required in the Patient Portal so patients and caregivers can either view, download, or send the patient's information to other providers.

- Provider's name and office contact information
- Laboratory test reports
- Diagnostic image reports

Capture Charting for Health Care Survey

To participate in the National Ambulatory Medical Care Survey (NAMCS), providers must capture the patient's chief complaint for each visit.

NOTE – This information is entered using encounter charting only.

Document Types

You can send a Continuity of Care or Referral Note document from WellSky Hospice and Palliative to another provider or entity via a <u>direct secure message</u>. Each document contains specific information required by CMS. See <u>Direct Trust</u> for information about direct secure messaging.

Continuity of Care

A continuity of care document provides a snapshot of the patient's most relevant administrative, demographic, and clinical information over time.

Referral Note

A referral note provides pertinent information from the provider who is requesting the clinical or non-clinical services of another provider. The information in a referral note includes the reason for the referral and additional information to augment decision-making and care delivery.

Required Information

The following information is required, and automatically included, in each document.

Continuity of Care	Referral Note
Allergies	Allergies
Encounters	Assessment and plan
Functional status	Functional status
Immunizations	Immunizations
Medications	Medications
Mental status	Mental Status
Plan of treatment	Plan of treatment
Problems	Problems
Procedures	Procedures
Results	Reason for referral
Vital signs	Results
	US realm patient name
	US realm person name
	Vital signs

Send a Direct Secure Message

To send patient information (in CCDA format) to another provider via direct secure message, complete these steps.

- 1. From the patient's home page, click MESSAGING > Direct Secure Messaging.
- 2. In the lower-right corner, click the \bigcirc icon.

Amendments	Direct Se	ecure Mess	ages: Sent							
	Date	Recipient	Document Type	Sender	Status	Referra	al Reaso	n		
	No data	matching the filt	er							
			Items per page: 20) 🗸	0 of 0	<	<	>	>	

3. In the **To** field, either enter the recipient's direct email or click **SEARCH RECIPIENTS** to find their email.

Send Direct Secure	e Mes	sage	
From			•
То			Search
Document Type			•
Start Date	ē	End Date	Ē
CANCEL			Send

4. In the Search Criteria section, enter information in at least two fields, then click Search.

Search for recipien	ts					
First Name	Last Name	NPI		Organization	City	
State	Zip	Phone		Fax		
CANCEL						Search
Name	Address	City	State Zip	Phone number	Fax number	
No data matching the fi	lter					
			lterr	ns per page: 20 🔻	0 of 0 < ≺	> >

5. In the Search Results section, find the correct recipient and on the left, click **SELECT**.

Search Res	ults						
					Q	Quick Filter	
	Name	Address	City	State	Zip	Phone Number	Fax Number
SELECT	Consolo - 1I- records	records@consolo-1.direct.kno2fy-integration.com	Boise	ID	837027144	2086952380	
SELECT	Consolo - 1I- records	records@consolo-1.direct.kno2fy-integration.com	Boise	ID	837027129	2086952380	

Important! Recipients must have a <u>direct trust</u> email address specifically for receiving CCDA documents.

6. The Send a Direct Secure Message screen displays, and the recipient field is automatically populated with your selection.

Send a Direct Secure Message	
Recipient records@consolo-1.direct.kno2fy-integration.com	SEARCH RECIPIENTS
Select Document Type 7	
Date Range: All Patient Data SELECT DATE RANGE 8	
9	SEND

- 7. From the Select Document Type drop-down list, select an option.
 - **Continuity of Care** Provides a snapshot of the patient's most relevant administrative, demographic, and clinical information.
 - Referral Note Provides pertinent information from the provider who is requesting the clinical or non-clinical services of another provider. Selecting this option displays the Reason for Referral field to enter information about the referral if needed.
- 8. To limit the information sent, click SELECT DATE RANGE. On the screen that opens, click the Start Date drop-down list, then select a date from the calendar. Repeat the process for the End Date drop-down list, then click DONE.
- 9. Click SEND.
- 10. The message displays in the Status column in the Direct Secure Messaging table.

				QUICK FILE	
Date	Recipient	Document Type	Sender	Status	Referral Reason
11/30/2020	records@consolo-1.direct.kno2fy-integration.com	Continuity of Care	Hendel, Michele	e Pending	
	Page: 1	✓ Rows per page: 25	👻 Displayi	ng 1 - 1 of 1	< >
			_		
			SEND	A NEW DIRE	CT SECURE MESSAG

There are several status options:

- Pending The message is ready to be delivered.
- Generating The document is being generated.
- Sending The message has been sent and WellSky Hospice and Palliative is awaiting a delivery confirmation from the recipient.

- **Sent** WellSky Hospice and Palliative received confirmation that the message was successfully delivered.
- Fail The document was generated and sent but the recipient did not receive it.

Where Incoming CCDA Documents are Routed

When a direct secure message is received from another provider, it is routed to one of two places.

• **CCDA Documents** – All CCDA documents automatically display on the <u>Reconciliation Dashboard</u>. These documents can be reconciled, then imported into the patient's medical record.



NOTE – Patient CCDA information received in an XML file can also be displayed on the Reconciliation Dashboard but must be <u>manually imported</u>.

• Non-CCDA Documents – All non-CCDA documents, such as a PDF, are routed to <u>Office Documents</u>. These documents can be moved to Documents in the patient's medical record if needed.

Reconciliation Dashboard Overview

The Reconciliation Dashboard is where you can view clinical data received via a direct secure message from an outside source, reconcile and import the clinical data, and manually upload a CCDA file if needed.

Complete these steps to open the Reconciliation Dashboard.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. On the left side, you can either select <u>filters</u> to narrow the displayed documents on the table or manually import a CCDA file.
- 3. Upload CCDA Use this feature to manually upload a file.
- 4. The clinical data imports are in the table on the Reconciliation Dashboard.
- 5. At the top of the dashboard table, select a <u>filter</u> tab to display the files by status. The tab selected here displays those results in the **Status** column in the table. Each status is associated with a color.
- 6. Use the **Search** filter in the upper right to <u>search</u> for an item in the table.
- 7. Click a **Column Header** to sort the table.
- 8. To view a document or complete other tasks, click the *i* icon on the right, then select an option.

Filters 2 ×	Reconciliation Da	ashboard 🛛 🛃			👳 Toggle	Filters	0	6	
Date Imported							C Search	0	
	ALL	NEW	IN PR	OGRESS COMPLET					
Patient Name	Patient Name	Imported By 7	Date Imported	Physician	Office	Status	Patient Stat	us Source A	ctions
Lines Name	Helen Barett	Kleinheksel, Charl	es 11/8/21, 9:10 Al	- N	-	Invalid	-	Uploac	:8
User Name	Isa Isabella	Thite, Suraj	8/10/21, 5:16 A	M -		Complete	ed .	Upload	:
	No Associated Patie	ent Thite, Suraj	8/9/21, 5:18 AM	Adams, Kendal 1557490253	CEHRT Immunizations	New	Referred	Upload	:
Source -	Isa Isabella	John, Leo	6/30/21, 7:11 A	M Abernathy, Manual 1575490	955 Abshire Group	In Progre	ssReferred	Upload	:
Clear Filters	Isa Isabella	John, Leo	6/30/21, 7:10 A	M Bayer, Ronda 1575490950	Greenholt Bergnaum and Effer	tz New	Transition	edUpload	:
Upload CCDA	Isa Isabella	John, Leo	6/24/21, 8:42 AI	M Abbott, Ying 1575469244	Abshire Group	New	Referred	Upload	:
3 <u>↑</u>	Isa Isabella	John, Leo	6/24/21, 8:41 Al	- N		New	-	Upload	:
Drag and Drop CCDA file or <u>Browse files</u> Max File Size: 20MB	Isa Isabella	John, Leo	6/24/21, 7:48 AI	M Check, Error	BreitenbergSchiller	New	Transition	edUpload	:
	Isa Isabella	John, Leo	6/24/21, 6:45 A	- N		In Progre	SS-	Upload	:
There are currently no file uploads in progress.					Items per page: 20 🔹	1 – 20 of 12	9 <	< >	×I

NOTE – The options available to select from the context menu (:) depend on the document status and whether a patient has been associated with the document.

Filter Tabs and Search Field

At the top of the table are status tabs. Click a tab to display those results in the table. In the upper-right corner is a search filter to narrow the results displayed. As you select a filter, the dashboard automatically updates.

- All Select this option to see documents in a status of new, in progress, and completed.
- New Select this option to display documents that are ready to be associated with a patient.
- In Progress Select this option to display documents that have been associated with patients but not yet imported into the patient's medical record.
- **Completed** Select this option to display documents that have been imported into the patient's medical record.



TIP – To find files with the status of *Invalid*, use the <u>search</u> filter in the upper right.

• Search – Place your cursor in the search field and begin typing a name, status, or source. The table will automatically refresh and display matching results.

If needed, on the left select or enter information in one or more filter options to narrow the documents displayed on the dashboard.

- Date Imported Either enter a date (MM/DD/YYYY) in this field or click the 🖆 icon, then select a date from the calendar that displays.
- Patient Name Begin typing a patient's name in this field, then select from the list that displays.
- User Name Begin typing a user's name in this field, then select from the list that displays.
- Source Select an option from this drop-down list.
 - o Upload CCDA documents that were manually uploaded.
 - IO Hub Future feature.
 - Kno2 Documents received from other providers via direct secure messaging.
- Clear Filters Click this to clear the filters on the left and at the top of the dashboard.

Columns

Click a column header to sort the table by that criterion. The table displays the following information in several columns.

- **Patient Name** The patient who is associated with the imported document. This will display as *No Associated Patient* until a patient is associated with the document.
- Imported By The person who imported it into the patient's medical record.



NOTE – The Imported By displays as *No Associated User* if the document is received from Kno2.

- Date Imported The date the document was received/uploaded into the patient's medical record.
- **Physician** The physician overseeing the patient at the time of documentation receipt.
- Office The office that gets credit for the referral
- Status The current state of the document.
 - $\circ~$ New The document has been received but not associated with a patient.
 - In Progress The document has been associated with a patient and may have some items selected for reconciliation but has not been imported.
 - Completed The document has been imported.
 - Invalid The document contains errors.
- Patient Status The status of the patient (this comes from associating a physician).
 - New The patient has never been seen.
 - Referred The patient has been referred but may not have been seen.
 - Transitioned The patient moved from one care setting to another (your agency).
 - Existing The patient is already in your agency's care.
- Source Identifies where the document came from.
 - Upload CCDA documents that were manually uploaded.
 - IO Hub Future feature.
 - WellSky Direct Documents received from other providers via direct secure messaging.
- Actions Click the i icon to access several options. The options that display depend on the document's status.

- Preview CCDA Preview the information in the document.
- Associate Patient Select this to begin the process of associating the document with a patient.
- Import CCD Data Select this to open, review, and select items to reconcile and import into the patient's medical record.
- Update Referral Data Select this option to associate a <u>physician or office</u> with the document or update the document's <u>status</u>.
- Download CCDA Select this to download the document in XML code.
- Save Copy to Patient Doc's This option generates a PDF. You receive a message that it is being generated. When ready, open it from Notifications in the lower-right corner. The PDF is also saved in the <u>patient's Documents</u> drawer on their home page.
- Delete Select this option to immediately and permanently delete a file.

NOTE – The Associate Patient option is only available if the name in the patient column displays as *No Associated Patient*. The Import CCD Data option is only available if a patient has been associated to the document.

Import CCDA Documents

Documents can be received from other providers either automatically, via a <u>secure message</u>, or as an XML file that the agency <u>manually imports</u>.

Received Via Direct Secure Message

Patient information received in CCDA format via a direct secure message automatically displays on the Reconciliation Dashboard. To import this information into the patient's medical record, complete the following steps.

Step 1: Associate the Patient With a CCDA Document

- 1. From the top navigation bar, click Main > Reconciliation Dashboard.
- 2. Find the information you want to import then on the right, click the icon> Associate Patient.
- 3. Any associated patient matches in WellSky Hospice and Palliative display on a new screen.
 - a. If there is a match, on the left select the **patient** (O icon).
 - b. In the lower right, click Associate Patient.

Associated Patient Matches	
Patient Demographics from CCDA	
Patient Name	Suffix
Newman, Alice	Not Provided
Date of Birth	Gender
1970-05-01	Female
Birth Sex	Race
Not Provided	Mixed
Ethnicity	Religion
Not Hispanic or Latino	Baptist
Preferred Language	Home Phone
English	Not Provided
Mobile Phone	Address
Not Provided	1357 Amber Dr
Social Security Number ****_***-8989	
One or more potential patient matches were Please review the suggested matches below Patient Name Alice Jones Newman Date of Birth 1970-05-01	e found in Consolo. w to determine if any align with your patient. Birth Name Alicia Gender Female Close Associate Patient

NOTE – Once you select a patient, the Associate Patient button turns blue and can be clicked. If a match is not found, ensure the patient has been properly entered in WellSky Hospice and Palliative, then attempt this process again.

- 4. A success message displays. Complete one of the following:
 - Click CLOSE to if you want to reconcile and import the information later. See <u>Reconcile and</u> <u>Import Data</u> to complete the process.
 - Click **Import CCD Data** to review, reconcile, and complete the import of the information into the patient's medical record now. See <u>Reconcile and Import Data</u> for the next step.

Step 2: Reconcile and Import the Data

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Important! Ensure the correct <u>patient is associated</u> to the CCDA document before completing this step and importing it into the patient's medical record.

- 1. If you just completed step 1 and <u>associated the patient</u> with the document (or <u>manually</u> imported a file), the importing clinical data screen in number two displays and you can go to that step.
 - If you previously started the reconciliation process and are returning to finish importing the data, go to the Reconciliation Dashboard and find the document, then click the i icon > Import CCD Data on the right.
- 2. The data import screen opens and displays the patient's information to review and compare.
 - The items on the left are incoming from the CCDA document that was sent to your agency.
 - The information on the right is what exists in WellSky Hospice and Palliative.

mpo Click t	porting Clinical Data for: Frank Patterson RT15 sk the checkbox beside the items you wish to import into the patients file.													
Alle	rgies								_					•
Inc	coming	Allergen E	Data from C	CD					Existing Allerg	en Data in C	onsolo			Create
Nar	ne	Severity	Side Effects	RxNorm Code	Onset	Clinical Status	Source	Import	Name	Severity	Reaction/Side Effects	Onset	Clinical Status	Actions
Pen G	icillin		Hives	7980	5/1/80	Active	Neighborhood Physicians Practice	3	Ampicillin		Weal (disorder)	3/17/21	Active	/ 🗉 🙆
Am	picillin		Hives	733	5/1/80	Active	Neighborhood Physicians Practice		Penicillin G		Weal (disorder)	3/17/21	Active	/ 1
									Testim	Moderate	Dizziness (finding)	6/22/21	Active 4	/
Prot	olems			95										
Inc	coming	Problem L	Jata from C	CD					Existing Proble	em Data in C	onsolo			Create
Des	cription			Snomed Code	Onset	s	iource	Import	Description	\$	Status	Onset	Actions	
Ess	ential hype	rtension		59621000	10/5/	I1 N	leighborhood Physicians Practice		Fever	4	Active	6/21/15	1	Ĩ
Sev	ere Hypoth	yroldism		83986005	12/31	/06 1	leighborhood Physicians Practice		Chronic rejection of transplant	of renal A	Active	12/30/11	1	Ĩ

NOTE – At this time, only Allergies, Problems, and Medications display for import.

Important! If the information does not load or the Import button does not work, go back to the Reconciliation Dashboard and find the file, then on the right, click the icon > Preview CCDA. On the preview screen, ensure there are no errors. See Address CCDA Errors.

3. In the incoming **Allergies** section on the left, select items in the **Import** column that you want to add to the patient's medical record. Repeat this step for incoming **Problems** and **Medications**.

4. On the right, the patient's current allergies, problems, and medications display from their WellSky Hospice and Palliative medical record. If needed, you can update them here.

In the existing Allergen, Problem, or Medication sections on the right, do any of the following.

- Click **Create** to open an entry screen and create a new item.
- Click the 🖍 icon to open an edit screen and update the item.
- Click the 💼 icon to delete an entry.



Important! Changes made in this step immediately update in the patient's medical record, regardless of whether you import information.

- 5. In the upper-right corner, click Import.
 - If needed, click **Save Progress** to save your work. To complete the process later see <u>Reconcile</u> and <u>Import Data</u>.
 - If there is nothing to reconcile or import, return to the Reconciliation Dashboard.
- 6. A confirmation screen displays for you to review the changes. When done, in the lower right, click **Confirm** to import the data.

	Review Imported Data							
1	You are about to import the following data into the patient record of Alice Jones Newman. Please review and verify that these changes are correct before continuing.							
	Allergies							
	Name	Severity	Side Effects	Imp	ort Status			
	Acetaminophen	moderate	Drowsy (finding)	Inco	oming			
	Acetaminophen	Moderate	Drowsy (finding)	Exis	ting			
	Ampicillin	Mild	Hives	Exis	ting			
	Penicillin V	Moderate	Weal (disorder)	Exis	ting			
	Problems							
	Description			Code	Import Status			
	Fever (finding)			386661006	5 Incoming			
	Pain (finding)			Inactive	Existing			
	Foot red (finding)			Active	Existing			
					CANCEL Confirm			

=

NOTE – The blue highlighted items are data you are bringing into the patient's WellSky Hospice and Palliative medical record. Other items are data that already exist in the patient's WellSky Hospice and Palliative medical record.

- 7. A message displays to confirm the import is processing.
- 8. A success message displays to confirm the import is complete.
- 9. The information is now available in the patient's medical record.

NOTE – If medications are imported, you will find them in the Requires Action section of the patient's Medication Record to be addressed as needed.

Edit, Delete, or Create Allergies During CCDA Import

When importing CCDA information, you can edit or delete the patient's allergies from the import screen.

- 1. From the top navigation bar, click Main > Reconciliation Dashboard.
- 2. Locate the CCDA file in the table.
- 3. On the right, click the i con > Import CCD Data.
- 4. Go to the Allergies section.
- 5. On the right, locate the allergy in the **Existing Allergen Data in Consolo** table.
- 6. On the right, do one of the following:
 - a. Click the $\widehat{\blacksquare}$ icon, then click **Confirm** to permanently delete the allergy.
 - b. Click the 🖍 icon to open a new screen and make changes. Proceed to the next step.
- 7. Make changes on the Edit Allergy Intolerance screen.
- 8. Click Save.

Edit Allergy Intolerance 7			Impo	rt Save Progres
Lookup Allergen Epinephrine	×			
Symptom Severity Moderate - Causes moderate physiological effects	•	e onest	Clinical Ctore	Create
Reactions and Side Effects Wheal (finding)	×	g) 11/4/21	Active	6 × 1
Comments		11/1/21	Active	/ 1
Test Allergy		a 11/4/21	Active	/ 1
Test Allergy	8 Save	3 11/4/21	Active	1

If needed, you can add an allergy to the patient's medical record from the import screen.

- 1. Go to the **Allergies** section.
- 2. Go to the Existing Allergen Data in Consolo table header and click Create.
- 3. Enter the allergy information on the Create Allergy Intolerance screen.
- 4. Click Create.

Edit, Delete, or Create Problems During CCDA Import

When importing CCDA information, you can edit or delete the patient's problems from the import screen.

- 1. From the top navigation bar, click Main > Reconciliation Dashboard.
- 2. Locate the CCDA file in the table.
- 3. On the right, click the i icon > Import CCD Data.
- 4. Go to the **Problems** section.
- 5. On the right, locate the problem in the Existing Problem Data in Consolo table.
- 6. On the right, do one of the following:
 - a. Click the 🛢 icon, then click **Confirm** to permanently delete the problem.
 - b. Click the 🖍 icon to open a new screen and make changes. Proceed to the next step.
- 7. Make changes on the Edit Problem Condition screen.
- 8. Click Save.

Edit Problem Condition 7					
Problem Condition Patch test (procedu	_{ire)} ×	ata in Consol	0		Create
Onset			-		
11/2/2021	ē	Status	Onset	Actions	
Resolution		Inactive	11/2/21	6∕ ∎	
11/3/2021		Active	11/2/21	1	
	8		, 21 21		
CANC	Save	Inactive	11/1/21	/ 1	

If needed, you can add a problem to the patient's medical record from the import screen.

- 1. Go to the **Problems** section.
- 2. Go to the Existing Problem Data in Consolo table header and click Create.
- 3. Enter the problem on the Create Problem Condition screen.
- 4. Click Create.

Edit, Delete, or Create Medications During CCDA Import

When importing CCDA information, you can edit or delete the patient's medications during import.

- 1. From the top navigation bar, click Main > Reconciliation Dashboard.
- 2. Locate the CCDA file in the table.
- 3. On the right, click the i con > Import CCD Data.
- 4. Go to the **Medications** section.
- 5. On the right, locate the medication in the Existing Medication Data in Consolo table.
- 6. On the right, do one of the following:
 - a. Click the 🛢 icon, then click **Confirm** to permanently delete the medication.
 - b. Click the 🖍 icon to open a new screen and make changes. Proceed to the next step.
- 7. Make changes on the Edit Medication Condition screen.
- 8. Click Save.

Edit Medication Condition	7					
Lookup Name/NDC Advil Cold/Sinus 3	30-20	0 MG PO Tablet	×			Import Save Progress
Date Ordered 10/31/2021		Dosage Amount 1		Consolo		Create
				Last Modified	Status	Actions
Ordering Prescriber Goodall, Paula R			×	s L 1 11/1/21 L	Active	6 ∕ ∎
Dosage Unit %,%	•	Route of Admin CONJUNCTIVAL	.	2- () 11/5/21	Active	/ 1
				2- () 11/19/21	Active	/ 1
☐ As Needed?		Reasons	•	L1 11/10/21 L(Active	/ =
		CANCEL	Save	- 11/1/21	Active	/ 1

If needed, you can add a medication to the patient's medical record from the import screen.

- 1. Go to the **Medications** section.
- 2. Go to the Existing Medication Data in Consolo table header and click Create.
- 3. Enter the medication on the Create Medication Condition screen.
- 4. Click Create.

Address CCDA Errors

You will receive errors and be unable to import CCDA data if an agency or provider sends information in the wrong format. You can still view the CCDA data they sent, but you cannot import it. Your agency would contact the sender about the errors.

If a CCDA document has errors, you will see them when you preview a document, as shown in these steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the document you want to view, then click the *i* icon > **Preview CCDA** on the right.
- 3. At the top of the preview screen, click the Errors tab to display and review the errors.



4. When done, click the **Default** tab to return to the CCDA data.

Other CCDA Features

Update the Status of a CCDA Document

To associate a physician with a CCDA document, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the patient and on the right, click the *i* icon > Update Referral Data.
- 3. On the Update Referral Data with the Patient Import screen, select an option from the **Status** dropdown list.

Update Referral Data with the Patient Import								
Physician Name	Office							
Status	•							
	Cancel Save							

- New The patient has never been seen.
- Referred The patient has been referred but may not have been seen.
- Transitioned The patient moved from one care setting to another (your agency).
- Existing The patient is already in your agency's care.
- 4. Click Save.
- 5. A success message displays.
- 6. On the Reconciliation Dashboard, the **Patient Status** column displays the updated information.

Associate a Patient With a CCDA Document

If a CCDA document was received, but not yet associated with a patient, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the information you want to associate, then on the right, click the icon > Associate Patient.
- 3. Any associated patient matches (by SSN) in WellSky Hospice and Palliative display on a new screen.
 - a. If there is an SSN match, select the **patient** (\bigcirc) on the left.
 - b. In the lower right, click Associate Patient.

Ass	ociated Patient Matches		
Pa	tient Demographics from CCDA		
Pat Nev	ient Name vman, Alice	Suffix Not Provided	
Dat 197	e of Birth 10-05-01	Gender Female	
Birt	h Sex Provided	Race Mixed	
Eth Not	n icity Hispanic or Latino	Religion Baptist	
Pre Eng	ferred Language lish	Home Phone Not Provided	
Mo Not	bile Phone Provided	Address 1357 Amber Dr	
Soc ***	ial Security Number **-8989		
One Plea	or more potential patient match se review the suggested match Patient Name	nes were found in Consol es below to determine if Birth Name	o. any align with your patient.
	Alice Jones Newman	Alicia	
	Date of Birth 1970-05-01	Gender Female	Close Associate Patient

NOTE – Once you select a patient, the Associate Patient button turns color and can be clicked. If a match is not found, ensure the patient has been properly entered into WellSky Hospice and Palliative, then attempt this process again.

- 4. A success message displays.
 - Click CLOSE to if you want to reconcile and import the information later. See <u>Reconcile and</u>
 <u>Import Data</u> to complete the process.
 - Click **Import CCD Data** to continue the reconciliation process by importing the CCDA data into the patient's medical record. See <u>Reconcile and Import Data</u> for the next step.

Preview a CCDA Document

To preview a CCDA document, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the document you want to view then click the *i* icon > **PREVIEW CCDA** on the right.
- 3. In the preview screen, select an option on the left to display that information on the screen.
 - All Sections This is the default and displays all available sections for selection on the left.
 - Preferred Sections Select this option to see your preferred sections on the left.
 - Select a Section Select a section in the list to jump to that information.

•			Derault	AML Settings
I Sections	Patient Demographics			
eferred Sections	Patient Name Jones, Isabella	Suffix Not Provided	Date of Birth 1947-05-01	Gender Female
ergies, Adverse actions, Alerts	Birth Sex	Race	Ethnicity	Religion
counters	Not Provided	white	NOT HISPANIC OF LATINO	Christian (non-Catholic, non- specific)
munizations	Preferred Language	Home Phone	Mobile Phone	Address
edications	English	(816)276-6909	Not Provided	1357 Amber Drive
ire Plan	Social Security Number ***-**- 5230			
ason For Referral	L			
oblems	Allergies, Adverse Reaction	ns, Alerts		
ocedures				
nctional Status	Substance	Reaction	Severity	Status
sults	Codeine	Shortness of Breath	Moderate	Active
cial History				

Important! If the provider or agency sent a CCDA document in the wrong format, you will see the word Errors in the upper-right corner, next to Default. In this case, you can still view the CCDA data they sent, but you cannot import it. See <u>Address</u> <u>CCDA Errors</u>.

4. In the lower right, either click **Import CCD Data** (if present) to open the import page and begin the process of <u>reconciling and importing</u> the data or **Close** to return to the dashboard.



Set Preferred Sections for Viewing CCDA Documents

When you view CCDA documents, all patient information sections display. If needed, you can set preferences so that you see only certain patient information. To do this, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the document you want to view, then click the *i* icon > **Preview CCDA** on the right.
- 3. On the preview screen, click Settings in the upper-right corner.
- 4. On the left side of the preferred sections screen, select the \Box option of each item you want to see when you view a CCDA document.

jones, isabella DOB: 1947-05-01 Gender: Female SSN: ***-5230 Default XML	Settings X
Use the checkboxes below to set your preferred sections. Sections can also be rearranged by dragging to Select:	ihe 🍀 icon. • SAVE CANCEL
Allergies, Adverse Reactions, Alerts	H
Encounters	6 → ‼
Immunizations	:
Medications	:
Care Plan	:
Reason For Referral	:
Problems	:
Procedures	:
Close	Import CCD Data

5. To automatically select all sections, click ALL in the upper left.

TIP – If you want to include most of the sections as your preference, you can click ALL, then remove the check mark from the options you want to omit.

- 6. To rearrange the list, click and hold the **#** icon on the right, then move it up or down.
- 7. In the upper right, click **SAVE**, then in the lower right click **Close** to close the screen.

NOTE – Your preferred settings remain for any document you view and will not impact what other users see. To change your preferences, repeat this process.

Associate a Physician or Office With a CCDA Document

To associate a physician with a CCDA document, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the patient and on the right, click the *i* icon > Update Referral Data.
- 3. On the Update Referral Data with the Patient Import screen, begin typing the physician's name in the **Physician Name** field, then select a name from the list.

Update Referral Data with the Patient Import								
Physician Name	Office							
Status	•							
	Cancel Save							

NOTE – If a physician's name displays above the Physician Name search field, it means that physician is associated with this CCDA document. If needed, you can associate a different physician.

- 4. Begin typing the office name (office who will receive the CCDA) in the **Office field**, then select a name from the list.
- 5. If needed, you can select an option from the **Status** drop-down list.
 - New The patient has never been seen.
 - Referred The patient has been referred but may not have been seen.
 - Transitioned The patient moved from one care setting to another (your agency).
 - Existing The patient is already in your agency's care.

- 6. Click Save.
- 7. A success message displays.
- 8. On the Reconciliation Dashboard, the information displays in the same-named column(s).



NOTE – If a match is not found, ensure the physician and office have been properly entered in WellSky Hospice and Palliative, then attempt this process again.

Save a CCDA to the Patient's Documents

To save a copy of the CCDA document to the patient's documents, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the document you want to view, then on the right, click the i icon > Save Copy to Patient Doc's.
- 3. A message displays that a PDF is being generated. When it is ready, you can open it from **Notifications** in the lower-right corner.
- 4. If needed, you can view the document from the patient's home page > DOCUMENTS > Patient Documents.

Download a CCDA Document

To download the document in XML code, complete the following steps.

- 1. From the top navigation bar, click MAIN > Reconciliation Dashboard.
- 2. Find the document you want to view, then on the right, click the *i* icon > Download CCDA.
- 3. Go to the Downloads folder on your computer to find the XML file.

NOTE – If needed, you can attach the document to a patient's medical record by going to the patient's home page and clicking **DOCUMENTS** > **Patient Documents**, then upload the file.

XML Files – Manual Import

Patient information received in CCDA format, via an XML file, must be manually imported to the Reconciliation Dashboard. From there, it can be associated with a patient, then reconciled and imported into their medical record.



Important! For this process, ensure the CCDA document is on your computer (in XML format only) so you can manually import the document into WellSky Hospice and Palliative.

To manually import patient information, complete the following steps.

- 1. From the top navigation bar, click Main > Reconciliation Dashboard.
- 2. On the bottom left of the Filters panel, import the CCDA file using one of these options.
 - Drag and drop a file.
 - Select Browse files, then choose the CCDA formatted file you want to upload.

Important! Only XML files can be uploaded.

User Name		Reconciliation I	Dashboard		
Source	•	ALL	NEW	IN PR	OGRESS
	Clear Filters	Patient Name	Imported By	Date Imported	Physician
Upload CCDA		Helen Barett	Kleinheksel, Cha	arles11/8/21, 9:10 Al	Λ-
<u> </u>	1	Isa Isabella	Thite, Suraj	8/10/21, 5:16 AM	Λ-
Drag and Drop CCDA file or May File Size: 200	DA file or <u>Browse files</u>	Isa Isabella	John, Leo	6/30/21, 7:11 A	/ Abernathy,
		Isa Isabella	John, Leo	6/30/21, 7:10 AM	A Bayer, Ron
There are currently uploads in prog	ress.				

3. The file upload progress displays in the lower left.

- 4. When the upload is complete, any associated patient matches in WellSky Hospice and Palliative display on a new screen.
 - a. If there is a match, on the left select the **patient** $(\bigcirc$ icon).
 - b. In the lower right, click Associate Patient.

Associated Patient Matches		
Patient Demographics from CCDA		
Patient Name Newman, Alice	Suffix Not Provided	
Date of Birth 1970-05-01	Gender Female	
Birth Sex Not Provided	Race Mixed	
Ethnicity Not Hispanic or Latino	Religion Baptist	
Preferred Language English	Home Phone Not Provided	
Mobile Phone Not Provided	Address 1357 Amber Dr	
Social Security Number ***-**-8989		
One or more potential patient mate Please review the suggested match Patient Name Alice Jones Newman	thes were found in Conso nes below to determine if Birth Name Alicia	lo. any align with your patient.
Date of Birth 1970-05-01	Gender Female	
		Close Associate Patient

NOTE – Once you select a patient, the Associate Patient button turns blue and can be clicked. If a match is not found, ensure the patient's information is correct, then attempt this process again.

- 5. A success message displays. Complete one of the following:
 - Click CLOSE to if you want to reconcile and import the information later. See <u>Reconcile and</u> <u>Import Data</u> to complete the process.
 - Click **Import CCD Data** to review, reconcile, and complete the import of the information into the patient's medical record now. See <u>Reconcile and Import Data</u> for the next step.

Non-CCDA Documents

Non-CCDA documents, such as a PDF, are routed to Office Documents (PDF, Word, non-CCDA documents). From there, they can be moved to the documents section in the patient's medical record if needed. Follow your agency's policy.

View a Non-CCDA Document

To view non-CCDA documents, complete the following steps.

- 1. From the top navigation bar, click ADMIN > Office Documents.
- 2. On the left, click Direct Secure Messages.

Con	nsolo	Direct Se	cure Messages					
	Office Documents	Filter						
	Claim Payment Documents	Start D	ate nter date 👻 🔳	End Date	1			
	Human Resources Documents				_			
	PHI Documents						Q Quick Flitter	
-		Received	Recipient	Sender	Message	Attachments		
	Bereavement Documents	11/19/2020	acme- testing@wellsky-	acme-testing@wellsky- interop.direct.kno2fy-	Referral from Wellsky - Interop Referral for: Patient	DIRECTTRUST ACCRE	DITED BUNDLE EXCHANGE	:
	Direct Secure Messages		interop.direct.kno2fy- integration.com	integration.com	ID: Patient Name: Clint Stokes Gender: F DOB: 11/01/2020 Address: Phone: undefined	WATKIA_202010[1].11		
		11/17/2020	acme- testing@wellsky- interop.direct.kno2fy- integration.com	hisp- testing@direct.ett.healthit.gov	3	170.315_B1_TOC_AMI	B_CCD_R11_SAMPLE1_V9.HTML	:

- 3. Find the document in the table, then in the Attachments column, click the blue document **Link** to download the document.
- 4. From your computer, go to the location of your downloaded files and open the document.

Delete a Non-CCDA Document

- 1. From the top navigation bar, click ADMIN > Office Documents.
- 2. On the left, click Direct Secure Messages.

Cor	nsolo	Direct Se	cure Messages				
	Office Documents	Filter					
	Claim Payment Documents	Start D	ate	End Date	÷		
	Human Resources Documents				-		O oviel Silver
	PHI Documents						
		Received	Recipient	Sender	Message	Attachments	
	Bereavement Documents	11/19/2020	acme- testing@wellsky-	acme-testing@wellsky- interop.direct.kno2fy-	Referral from Wellsky - Interop Referral for: Patient	DIRECTTRUST ACCRE MATRIX_202010[1].P	EDITED BUNDLE EXCHANGE
	Direct Secure Messages		interop.direct.kno2fy- integration.com	integration.com	ID: Patient Name: Clint Stokes Gender: F DOB: 11/01/2020 Address: Phone: undefined		
		11/17/2020	acme- testing@wellsky- interop.direct.kno2fy- integration.com	hisp- testing@direct.ett.healthit.gov		170.31 Move	to Patient

- 3. Find the document in the table then to the right, click the *i* icon >**Delete**.
- 4. In the confirmation message, click YES, DELETE THE DATA.

Move a Non-CCDA Document

- 1. From the top navigation bar, click ADMIN > Office Documents.
- 2. On the left, click Direct Secure Messages.

Con	isolo	Direct See	cure Messages					
	Office Documents	Filter						
	Claim Payment Documents	Start D	ate nter date 👻 🖬	End Date	1			
	Human Resources Documents		-		_		O Quick Eilter	
	PHI Documents	Received	Recipient	Sender	Message	Attachments	Quick Filter	
	Bereavement Documents	11/19/2020	acme- testing@wellsky-	acme-testing@wellsky- interop.direct.kno2fy-	Referral from Wellsky - Interop Referral for: Patient	DIRECTTRUST ACCRE MATRIX_202010[1].PI	EDITED BUNDLE EXCHANGE	
	Direct Secure Messages a		interop.direct.kno2fy- integration.com	integration.com	D: Patient Name: Clint Stokes Gender: F DOB: 11/01/2020 Address: Phone: undefined			
		11/17/2020	acme- testing@wellsky- interop.direct.kno2fy- integration.com	hisp- testing@direct.ett.healthit.gov		170.31 Move t	to Patient	

- 3. Find the message in the table.
 - To narrow the results or find a specific message, use the **Quick Filter** search at the top right of the table.
 - To find messages by date, enter a **Start Date** and **End Date** in the Filter section at the top of the page.
- 4. Click the *i* icon > **Move to Patient** on the right.
- 5. In the Move to Patient Documents screen, place your cursor in the **Patient Search** field. Begin typing the patient's name, then select the correct name from the list.

Move to Patient Documents		
Message: Referral from Wellsky - Interop Referral for: Patient ID: Patient Name: Clint Stokes Gender: F De	OB: 11/01/202	0 Address: Phone: undefined
Files being moved Date Received: Thu Nov 19 2020 Sender: acme-testing@wellsky-interop.direct.kno2fy-integration.com Recipient: acme-testing@wellsky-interop.direct.kno2fy-integration.com Number of documents: 1 File types: pdf		
	CANCEL	ATTACH TO PATIENT

6. Click ATTACH TO PATIENT.

7. The document moves from Office Documents to the patient's home page and can be reviewed there by clicking **DOCUMENTS** > **Patient Documents**.

NOTE – If you moved the document to the wrong patient's medical record, go to that patient's documents and download the document, then upload it to the correct patient's medical record.

Follow your agency's policy for removing patient documents placed in the wrong medical record.

Manually Export a CCDA Document

If a patient requests a copy of their medical record, you can manually export it to an XML file to give to the patient. This process is different from <u>direct secure messages</u> where information is shared electronically between your agency and another health care provider on the patient's behalf.

To manually export patient information (in CCDA format), complete these steps.

- 1. From the patient's home page, click **DOCUMENTS** > **CCDA Export**.
- 2. Select an option from the Document Type drop-down list.
 - If you select Referral Note, the **Reason for Referral** field displays to enter additional information if needed.
- 3. To download data in a certain date range, select a date from the **Start Date** drop-down calendar, then from the **End Date** drop-down calendar.
- 4. In the lower-right corner, click **DOWNLOAD**.

CCDA Export	
Document Type	
Start Date	End Date

5. A copy of the file downloads to your computer and can be shared with the patient.

Important! Follow your agency's policy regarding sharing this PHI with the patient.

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