WellSky® Hospice and Palliative

Interoperability Features – Secure Patient Information Exchange

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Contact Us

WellSky Corporation
11300 Switzer Road
Overland Park, KS 66210

Web: http://www.wellsky.com

Customer Support: 877.846.5831, press 3

Customer Support Email: support@consoloservices.com

Please identify the name of your organization in voice mails or emails.

Revision History

Last Update	Release Date	Release Version	Revision Description
December 16, 2020	Not applicable	Not applicable	Initial release for beta
February 5, 2021	Not applicable	Not applicable	General updates
March 1, 2021	Not applicable	Not applicable	General updates
April 29, 2021	Not applicable	Not applicable	General updates
July 7, 2021	Not applicable	Not applicable	Available in staging and production
November 17, 2021	November 23, 2021	5.131.0	Reflects changes in release 5.131.0. See corresponding release notes for more information.

Contents

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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 support@consoloservices.com 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 standard format 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 secure messaging to another health care provider or entity. The information sent is either a Continuity of Care or Referral Note document. See Document Types.
- **Reconciliation** – Information received from other providers, in CCDA format, is reconciled then imported 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 2015 edition certification companion guide 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 documents. 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 CCDS information, the following are also required in a Continuity of Care 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)
    - 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 CCDS information, the following are also required in the Referral Note 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

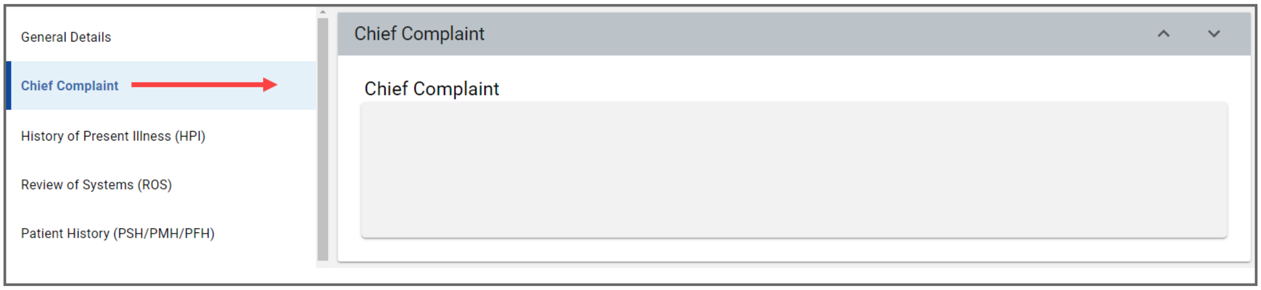
View, Download, and Transmit – Specific Elements

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 direct secure message. Each document contains specific information required by CMS. See Direct Trust 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

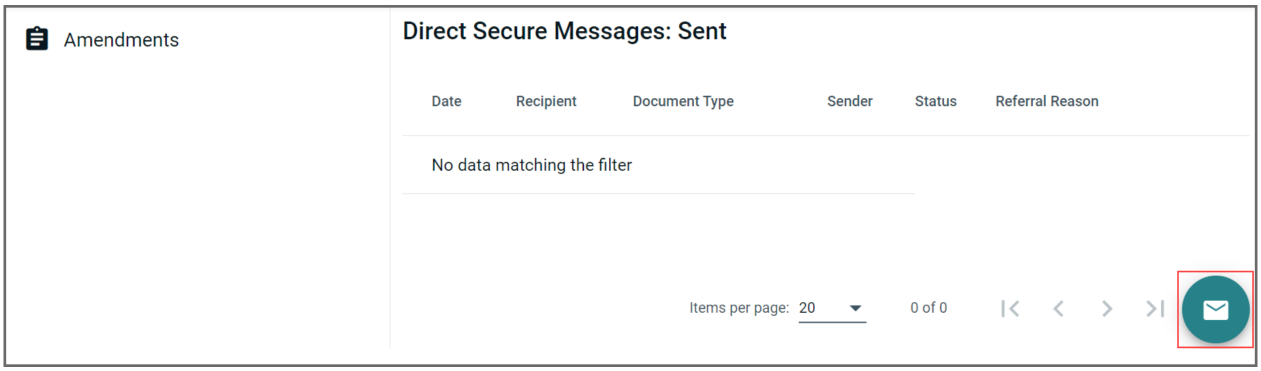
The following information is required, and automatically included, in each document.

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

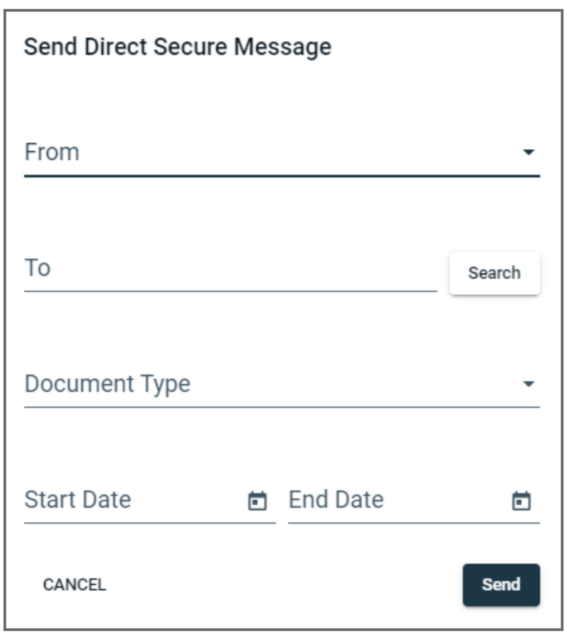
Send a Direct Secure Message

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 icon.



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

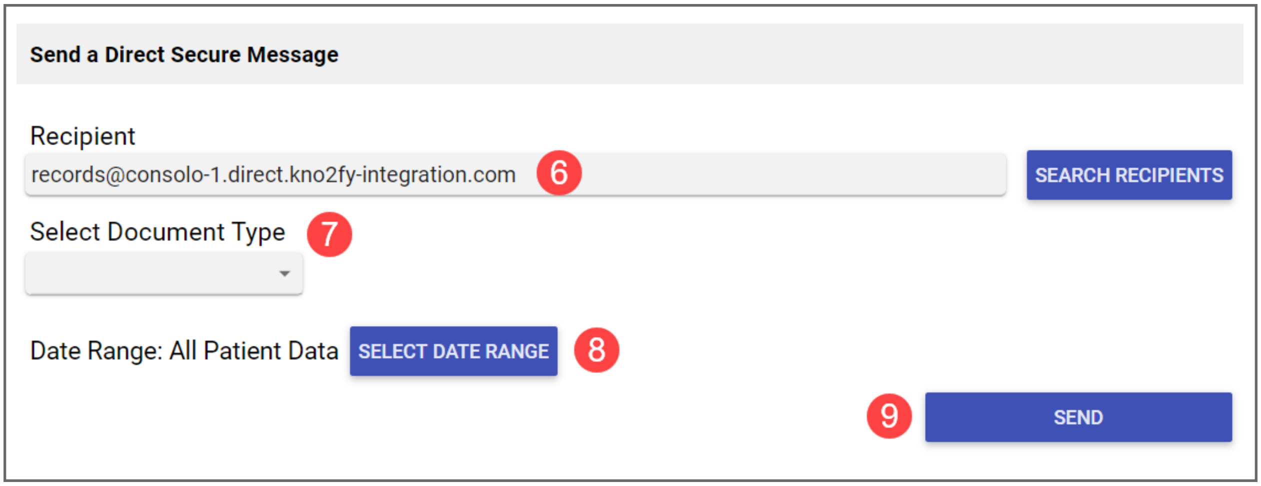


4. In the Search Criteria section, enter information in at least two fields, then click **Search**.

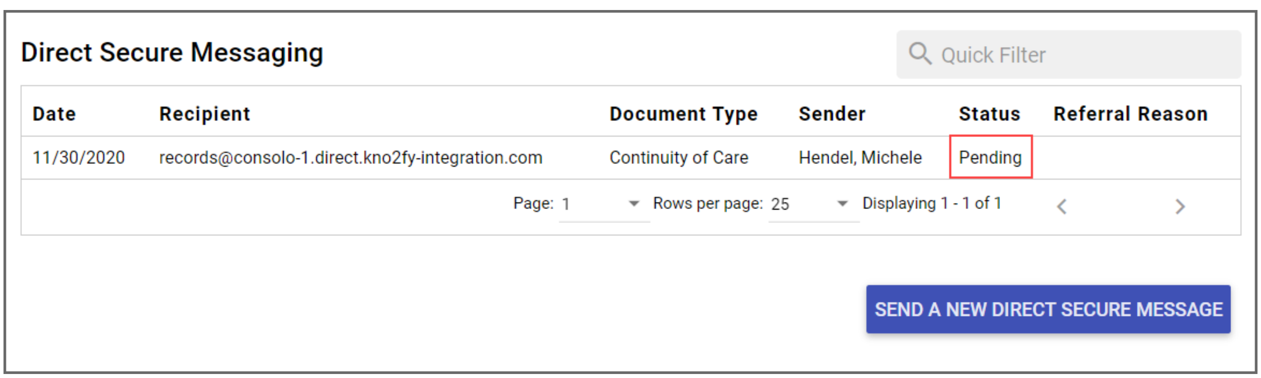
5. In the Search Results section, find the correct recipient and on the left, click **SELECT**.

Important! Recipients must have a direct trust 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.



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.



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 Reconciliation Dashboard. 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 manually imported.

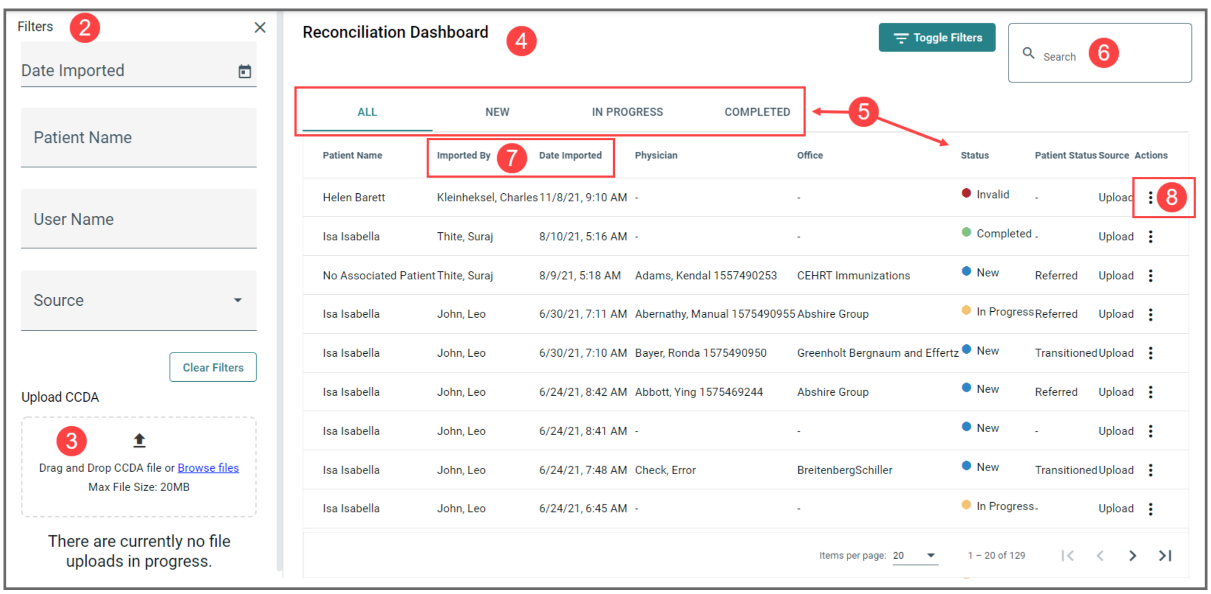
- Non-CCDA Documents – All non-CCDA documents, such as a PDF, are routed to Office Documents. These documents can be moved to Documents in the patient's medical record if needed.

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 filters 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 filter 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 search 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 ⋮ icon on the right, then select an option.



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 search 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.
  - 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.
  - 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 ⋮ 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 physician or office with the document or update the document's status.
- 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 patient's Documents 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

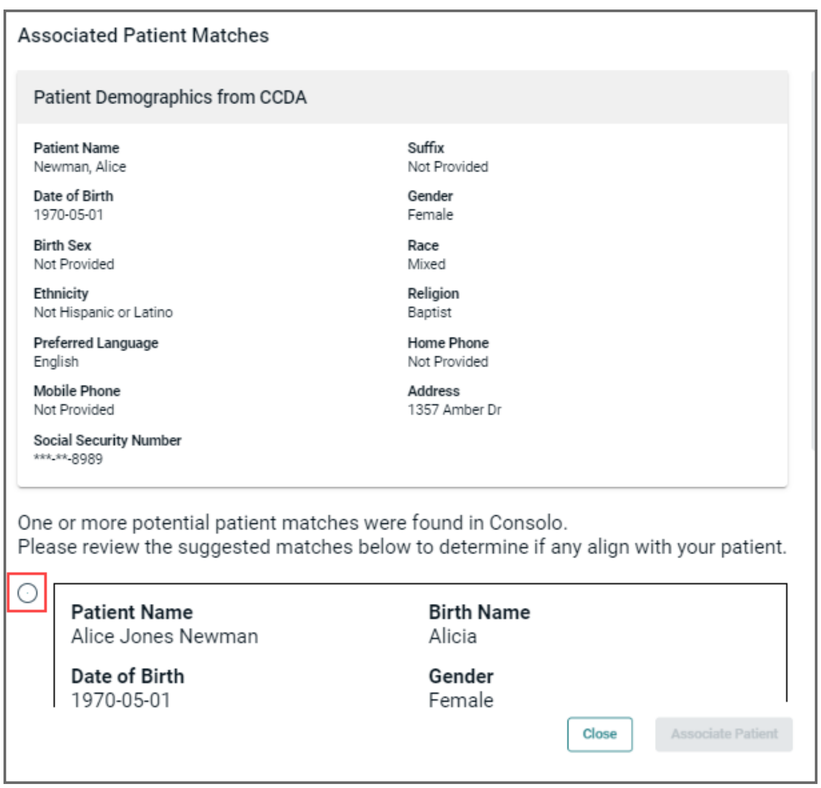
Documents can be received from other providers either automatically, via a secure message, or as an XML file that the agency manually imports.

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** (○ icon).
   b. In the lower right, click **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.

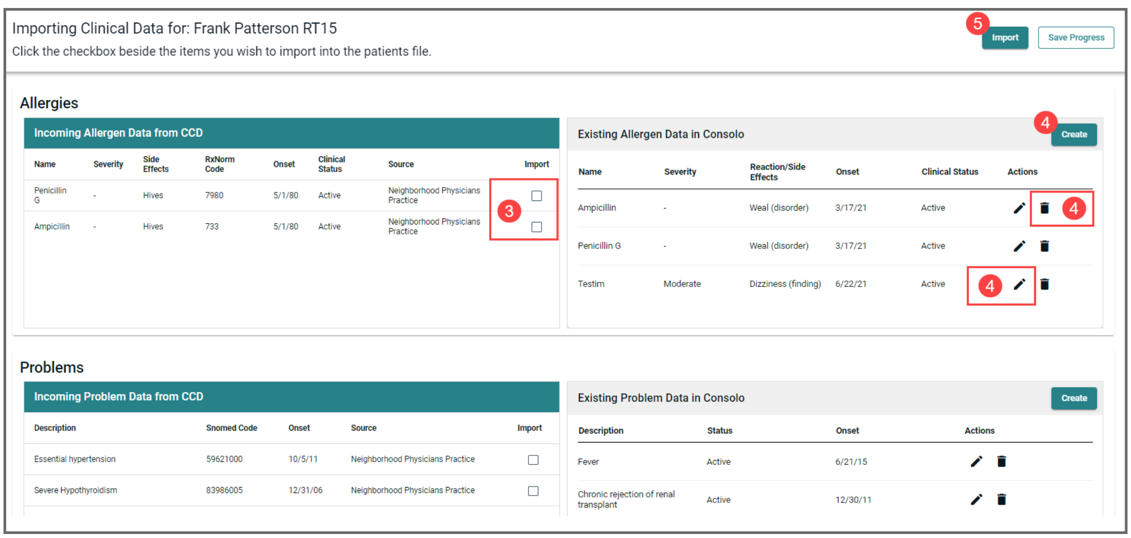
4. A success message displays. Complete one of the following:

   - Click **CLOSE** to if you want to reconcile and import the information later. See Reconcile and Import Data 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 Reconcile and Import Data for the next step.

Step 2: Reconcile and Import the Data

Important! Ensure the correct patient is associated 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 associated the patient with the document (or manually 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 ⋮ 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.



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.

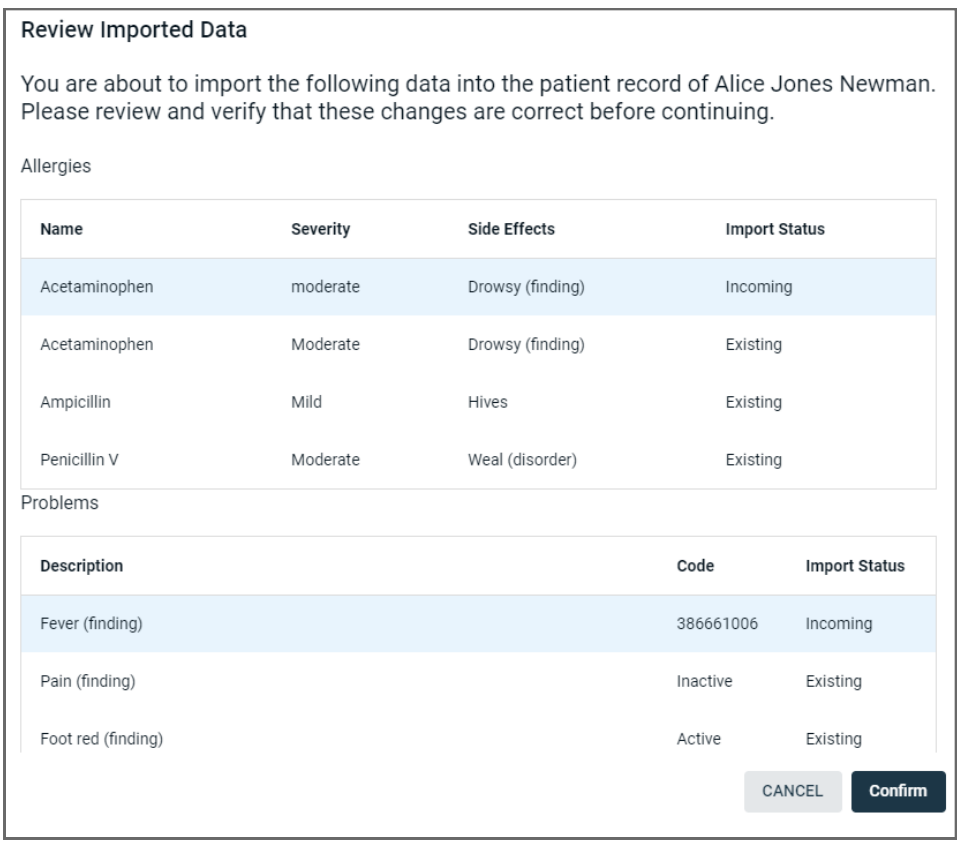
   - Click **Create** to open an entry screen and create a new item.
   - Click the icon to open an edit screen and update the item.
   - Click the icon to delete an entry.

   > **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 Reconcile and Import Data.
   - 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

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	Import Status
Acetaminophen	moderate	Drowsy (finding)	Incoming
Acetaminophen	Moderate	Drowsy (finding)	Existing
Ampicillin	Mild	Hives	Existing
Penicillin V	Moderate	Weal (disorder)	Existing

Problems

Description	Code	Import Status
Fever (finding)	386661006	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.

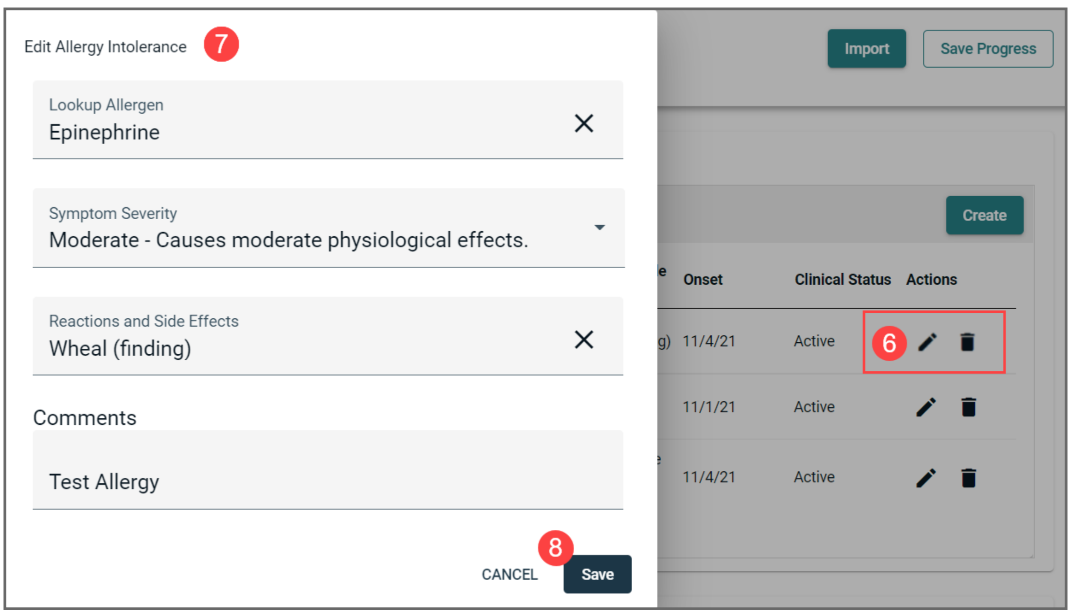
7. A message displays to confirm the import is processing.
8. A success message displays to confirm the import is complete.
9. The information is now available in the patient's medical record.

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 ⋮ icon > **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 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**.



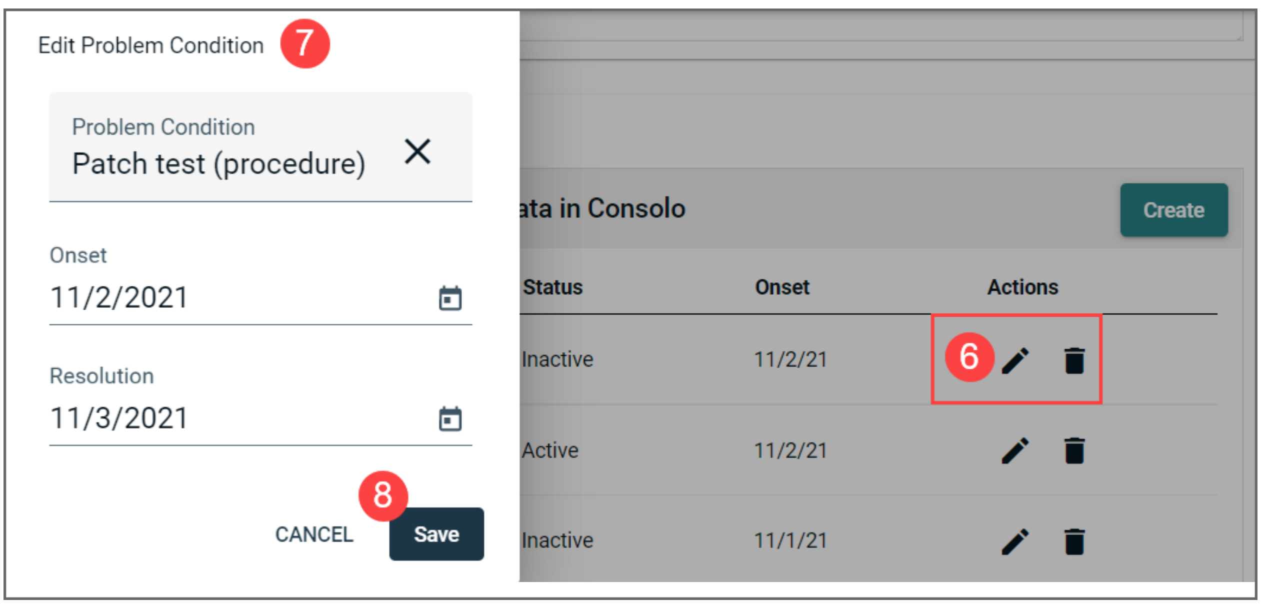
If needed, you can add an allergy to the patient's medical record from the import screen.

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 ⋮ 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**.



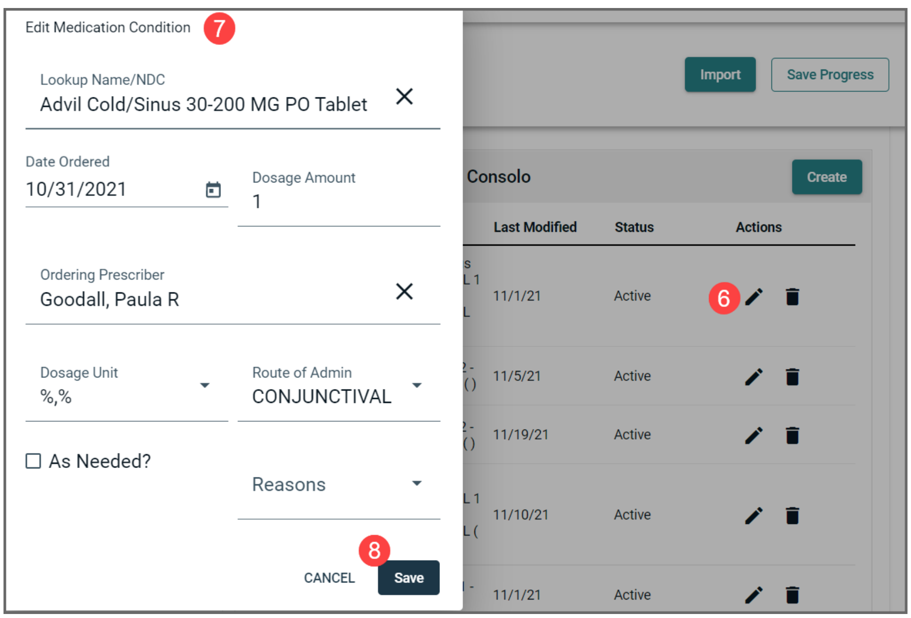
If needed, you can add a problem to the patient's medical record from the import screen.

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 ⋮ icon > **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**.



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

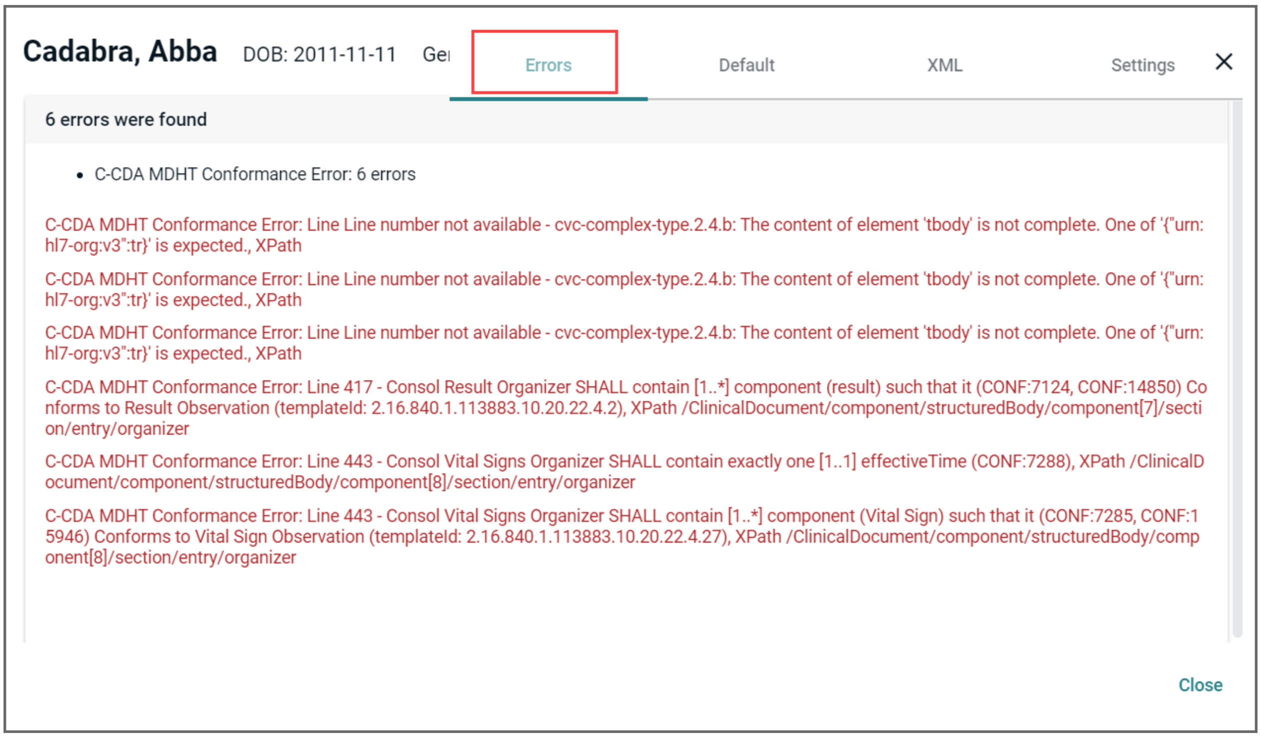
1. Go to the **Medications** section.
2. Go to the **Existing Medication Data in Consolo** table header and click **Create**.
3. Enter the medication on the **Create Medication Condition** screen.
4. Click **Create**.

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 icon > **Preview CCDA** on the right.
3. At the top of the preview screen, click the **Errors** tab to display and review the errors.



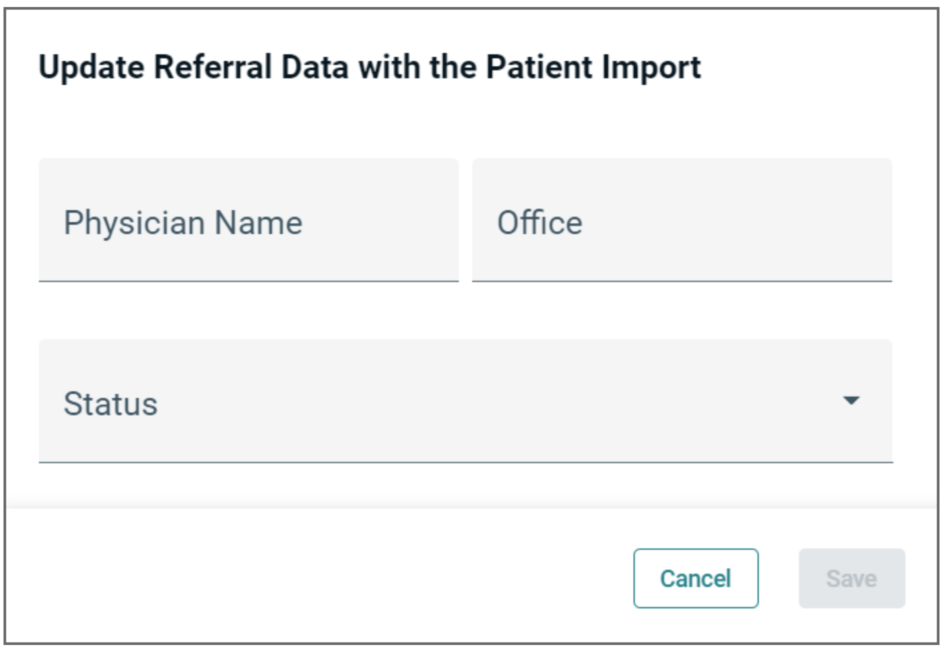
4. When done, click the **Default** tab to return to the CCDA data.

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 ⋮ icon > **Update Referral Data**.
3. On the Update Referral Data with the Patient Import screen, select an option from the **Status** drop-down list.



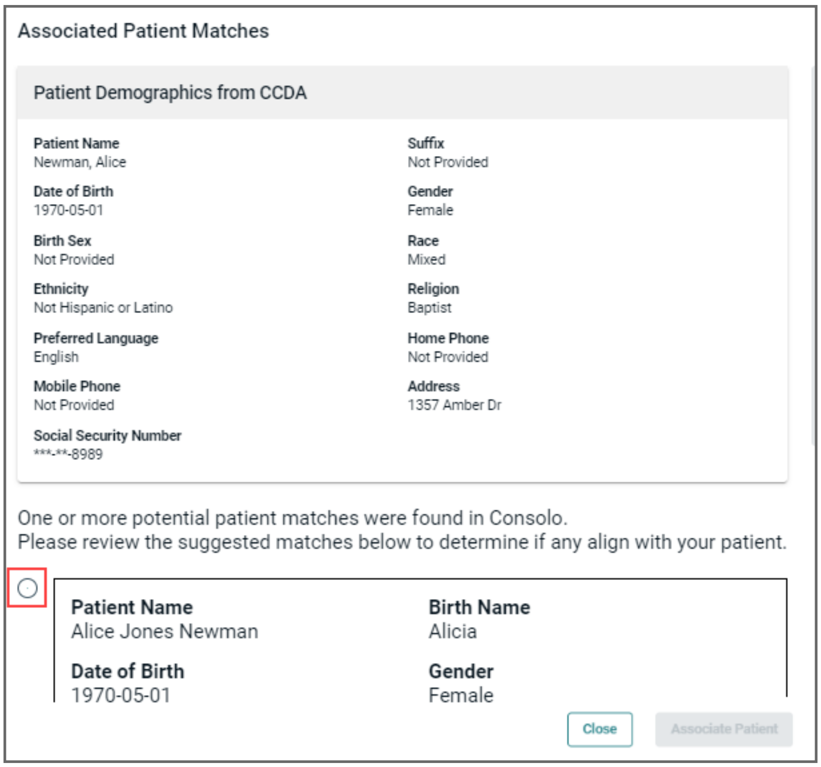
- **New** – The patient has never been seen.
- **Referred** – The patient has been referred but may not have been seen.
- **Transitioned** – The patient moved from one care setting to another (your agency).
- **Existing** – The patient is already in your agency's care.

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** (○) on the left.
   b. In the lower right, click **Associate Patient**.



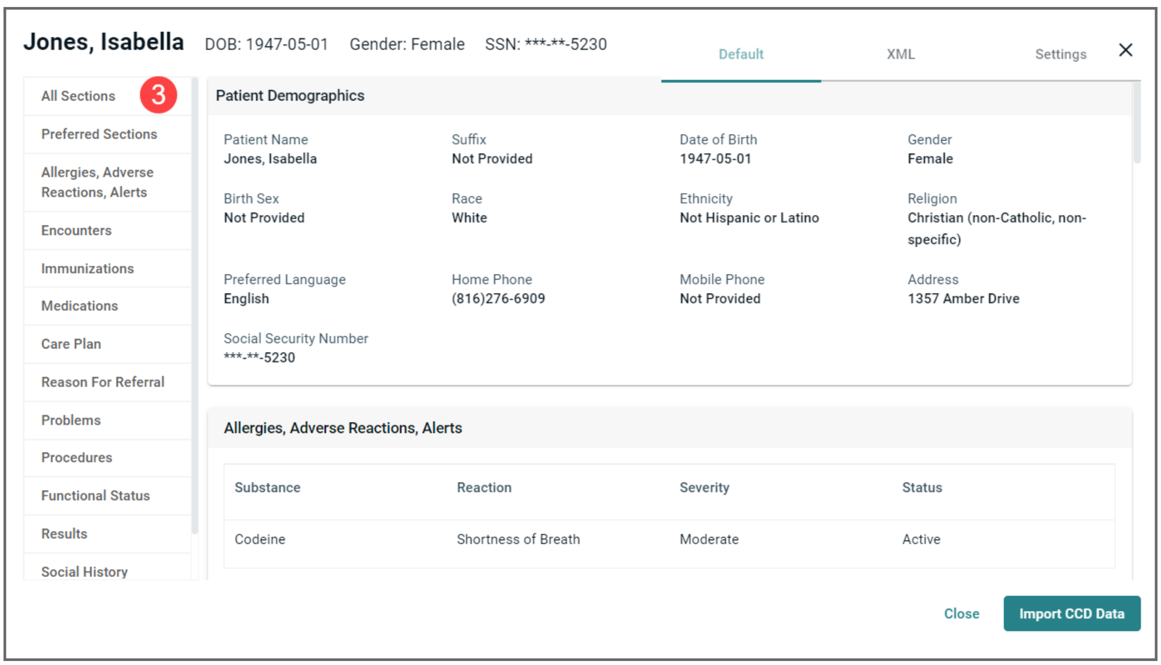
NOTE – Once you select a patient, the Associate Patient button turns color and can be clicked. If a match is not found, ensure the patient has been properly entered into WellSky Hospice and Palliative, then attempt this process again.

4. A success message displays.
   - Click **CLOSE** to if you want to reconcile and import the information later. See Reconcile and Import Data 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 Reconcile and Import Data 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 ⋮ 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.



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 Address CCDA Errors.

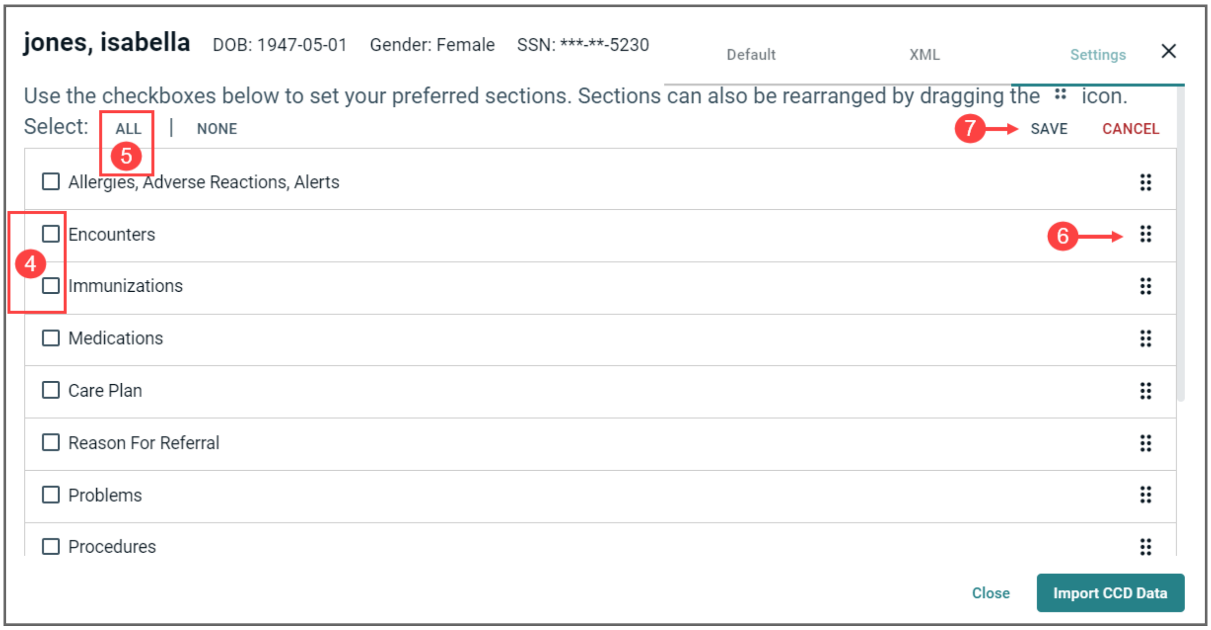
4. In the lower right, either click **Import CCD Data** (if present) to open the import page and begin the process of reconciling and importing the data or **Close** to return to the dashboard.

NOTE – The Import Data option is available if the patient has been associated with the CCDA document. The XML option in the upper right is for Consolo support use.

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 ⋮ 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 ☐ option of each item you want to see when you view a CCDA document.



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.

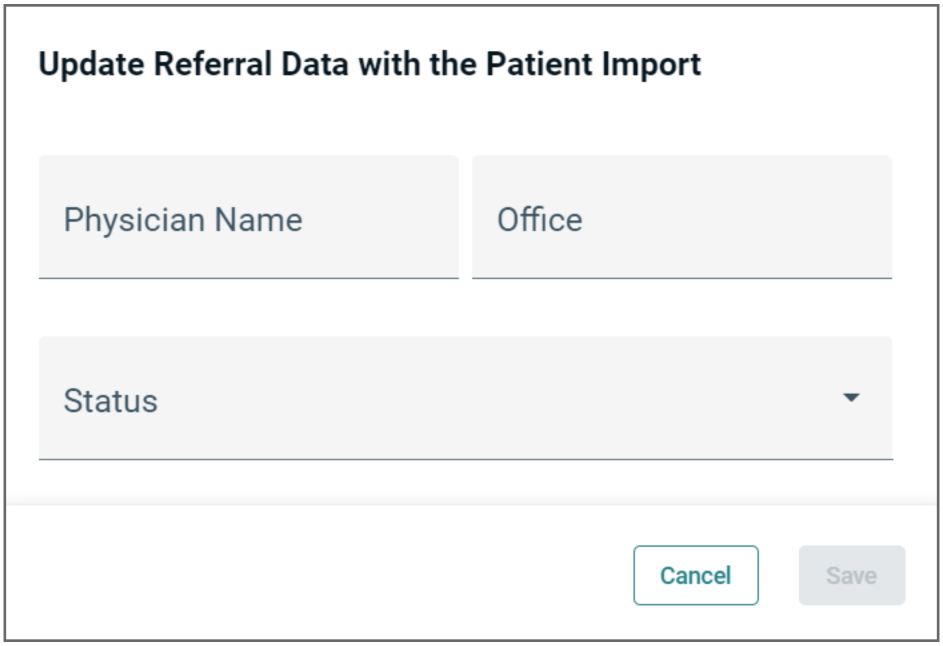
6. To rearrange the list, click and hold the ⠿ icon on the right, then move it up or down.
7. In the upper right, click **SAVE**, then in the lower right click **Close** to close the screen.

> **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 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.



> **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 ⋮ 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 ⋮ 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

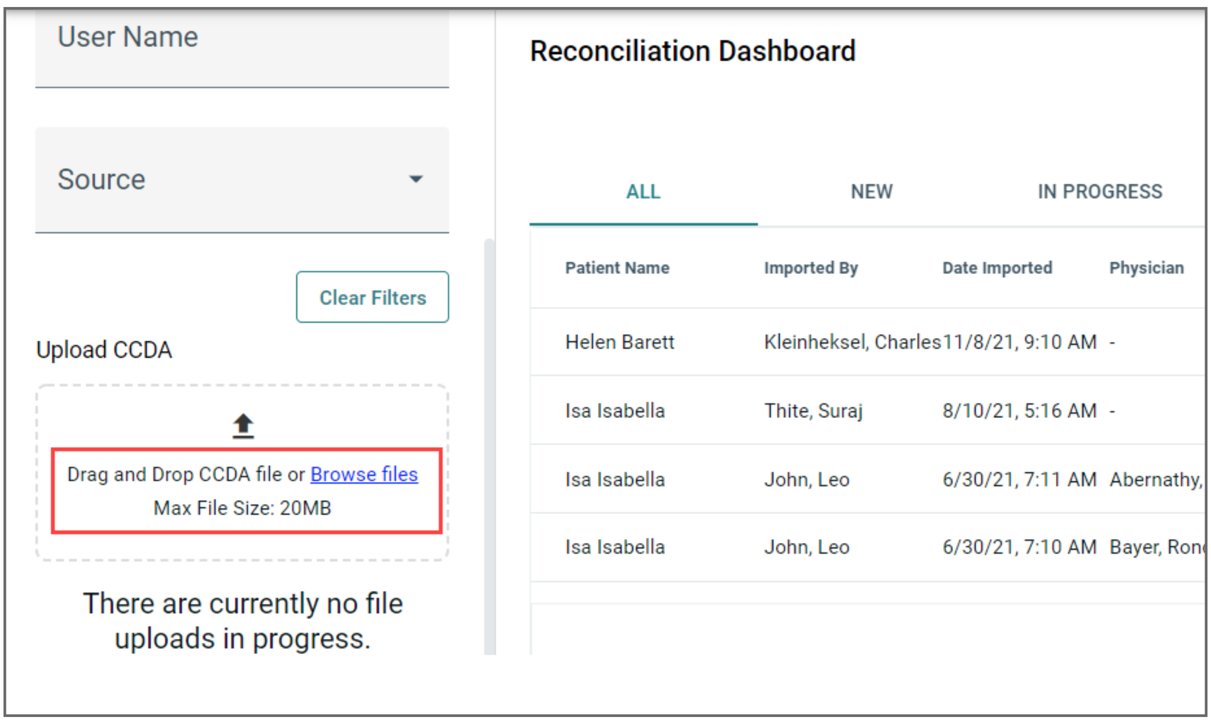
Patient information received in CCDA format, via an XML file, must be manually imported to the Reconciliation Dashboard. From there, it can be associated with a patient, then reconciled and imported into their medical record.

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.

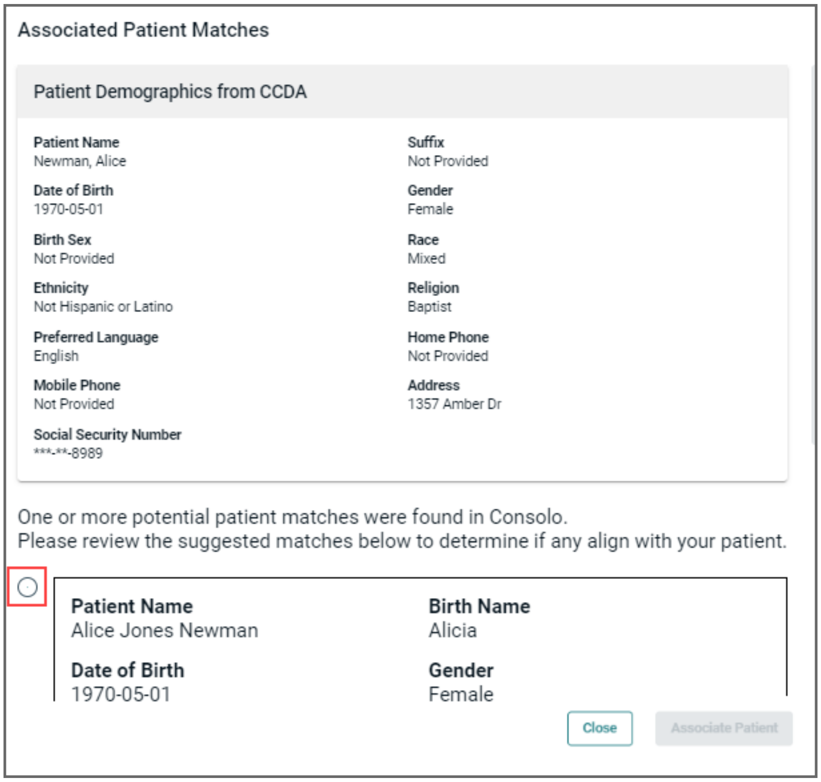


3. The file upload progress displays in the lower left.

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** (○ icon).

   b. In the lower right, click **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 Reconcile and Import Data 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 Reconcile and Import Data for the next step.

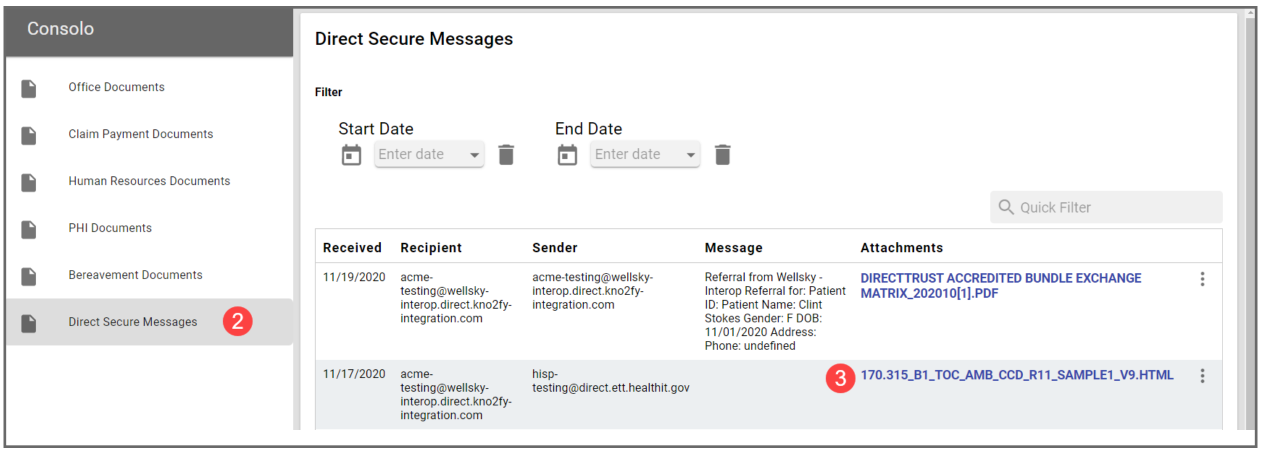
Non-CCDA Documents

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.

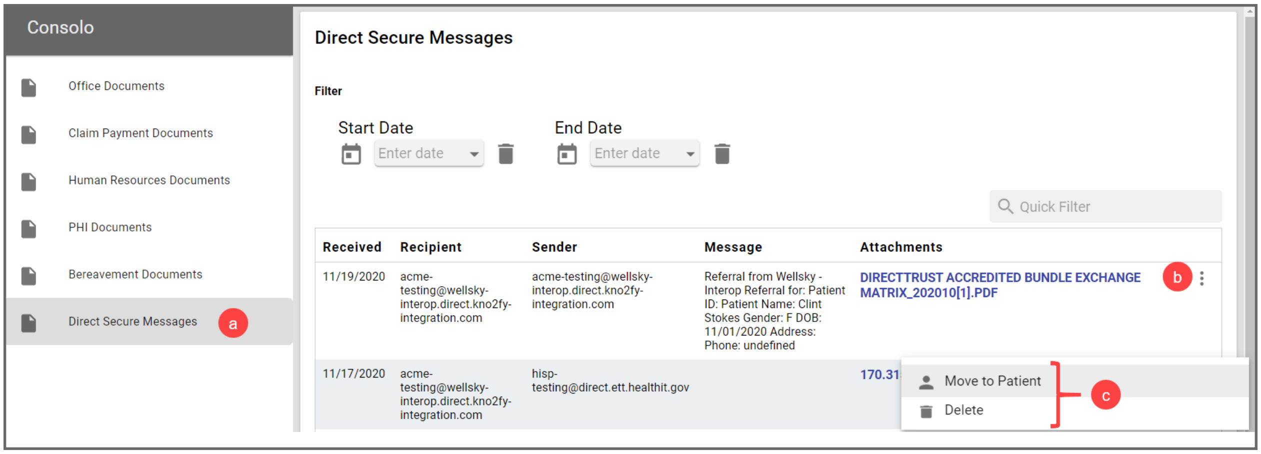
1. From the top navigation bar, click **ADMIN** > **Office Documents**.
2. On the left, click **Direct Secure Messages**.



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

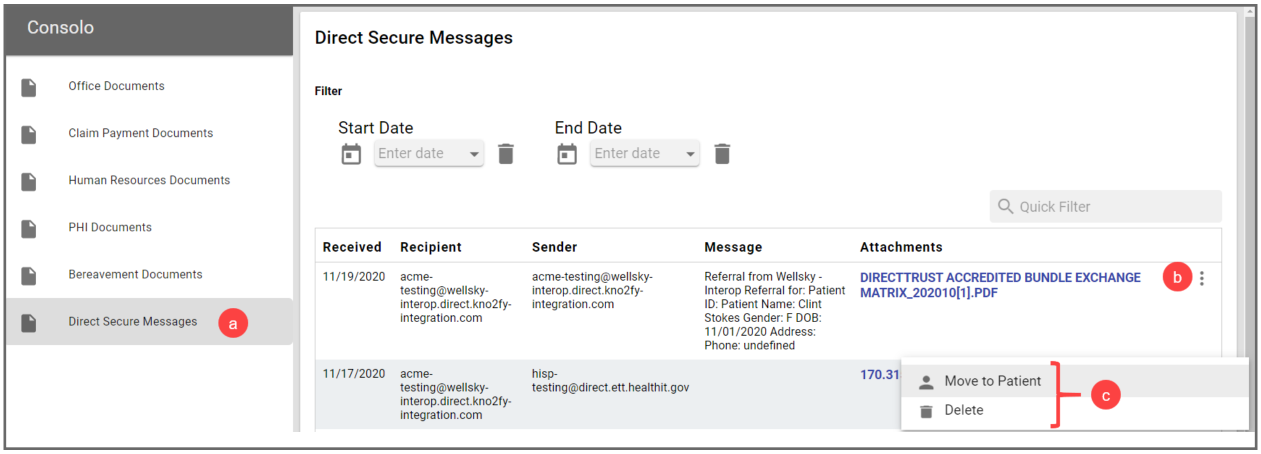
1. From the top navigation bar, click **ADMIN** > **Office Documents**.
2. On the left, click **Direct Secure Messages**.



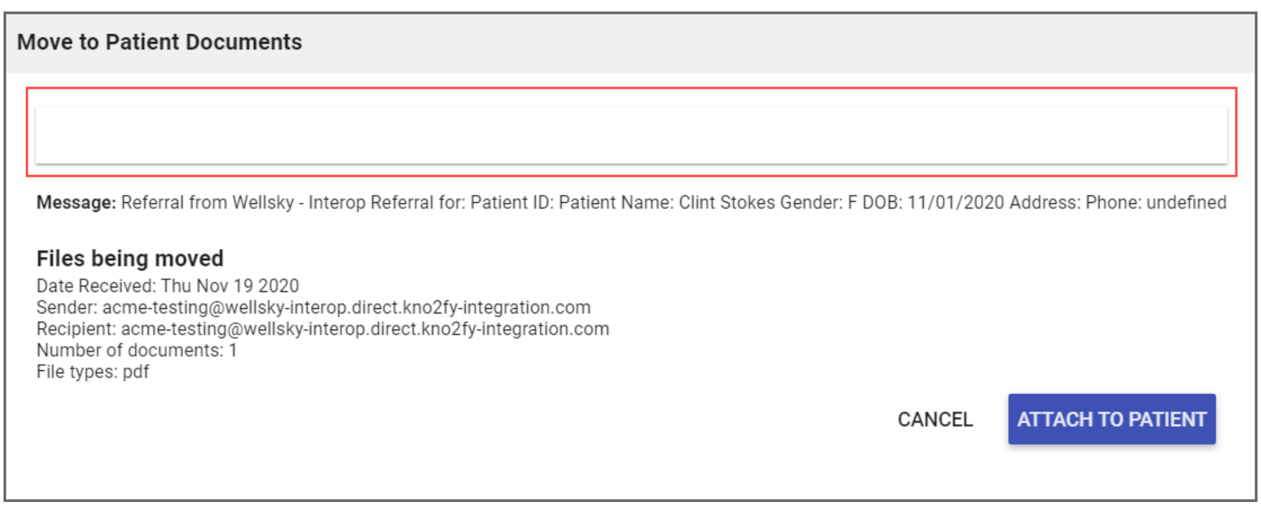
3. Find the document in the table then to the right, click the ⋮ icon >**Delete**.
4. In the confirmation message, click **YES, DELETE THE DATA**.

Move a Non-CCDA Document

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



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 ⋮ 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.



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**.

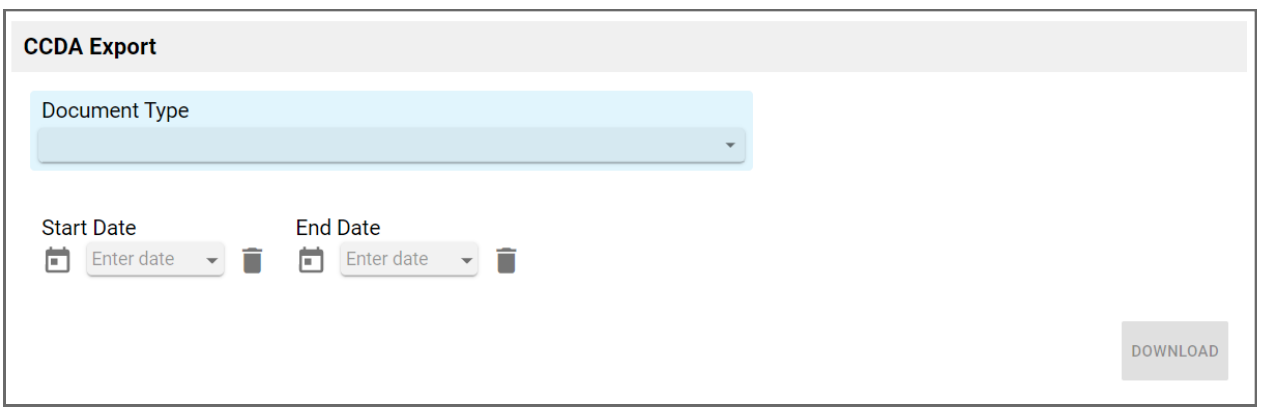
> **NOTE –** If you moved the document to the wrong patient's medical record, go to that patient's documents and download the document, then upload it to the correct patient's medical record.
>
> Follow your agency's policy for removing patient documents placed in the wrong medical record.

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 direct secure messages 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**.



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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