

Create an On-Demand CDA

Last Modified on 05/18/2022 1:40 pm EDT

Overview

On-Demand CDAs can be created and exported for a single patient from:

- A finalized Encounter or Well Visit note
- Medical Records

The CDA can be sent using Direct Messaging, or it can be saved to a local export location and Document Management simultaneously. In order to create a CDA, the logged-in user must be added as a user to the OP Patient Portal, powered by IntelliChart.

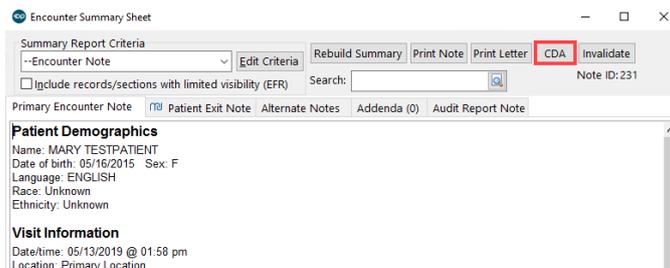


Note: As you work through the steps below, you may encounter a message stating the CDA file is not available. Click [here](#) for more information.

On-Demand CDA From a Finalized Patient Encounter or Well Visit Note

Create the CDA

1. Navigate to the patient's chart: **Clinical, Billing, or Practice Management tab > Patient Chart button > search for and select the patient.**
2. Click **Encounters** or **Well Visits**.
3. Select a finalized Encounter or Well Visit note from the list.
4. Click the **Open Note** button. The Encounter Summary Sheet is displayed.
5. Click the **CDA** button. This button is grayed out if the Visit Note is not finalized.
6. Continue to **Save** or **Send** the CDA (below).



Encounter Summary Sheet

Summary Report Criteria

--Encounter Note Edit Criteria Rebuild Summary Print Note Print Letter **CDA** Invalidate

Include records/sections with limited visibility (EFR) Search: Note ID: 231

Primary Encounter Note Patient Exit Note Alternate Notes Addenda (0) Audit Report Note

Patient Demographics

Name: MARY TESTPATIENT
Date of birth: 05/16/2015 Sex: F
Language: ENGLISH
Race: Unknown
Ethnicity: Unknown

Visit Information

Date/time: 05/13/2019 @ 01:58 pm
Location: Primary Location

Save the CDA

In order to save a CDA, the logged in user must have permission **Admin_CDA_Export_Single**.

1. In the Confirm window, click the **Save** button. The Select Folder for CDA Export window opens to the default file location to save the CDA locally. It is recommended to save the file to a folder with the best level of security available to safeguard patient Protected Health Information (PHI). A copy of the CDA will also be saved in **Document Management** under the Image Category : CDA (**MU clients only**).

Send the CDA

In order to send a CDA, the logged in user must have a secure Direct Messaging email address.

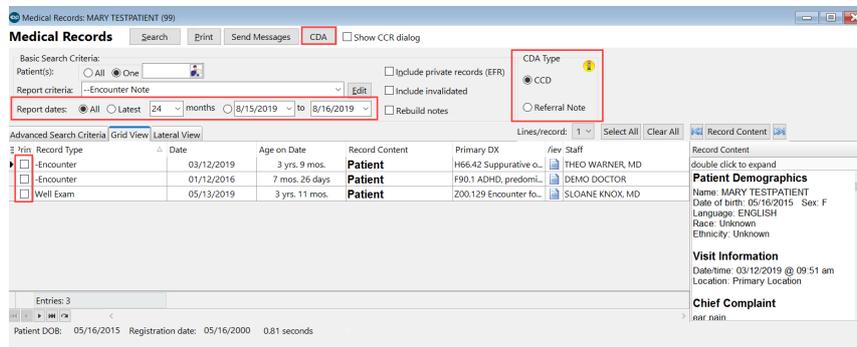
1. In the Confirm window, click the **Send** button. The Message window opens with the subject, message, and attachment populated. A file can be removed by clicking the **X** in the Drop column.
2. Complete the **To:** field:
 - a. Click the **Address Book** button  to open the Choose Recipients window. Direct Message recipients are displayed with the Direct Recipient icon  to the left of their name.
 - b. Select the checkbox in the Send column for the intended recipient.
 - c. Click the **OK** button.
3. Add additional information to the Message field, if necessary.
4. Click the **Send** button. The Direct Message with attachment is sent to the external recipient.

On-Demand CDA From Medical Records

Path: Clinical tab > Medical Records button

Path: Clinical, Practice Management, or Billing tab > Patient Chart > Medical Records

1. Navigate to and populate the patient's Medical Records following one of the paths above.
2. From the CDA Type options (**MU or OP Patient Portal practices Only**), select either **CCD** (Summary) or **Referral Note** (Summary with Referral Reason).
3. Set the CDA parameters (**MU or OP Patient Portal practices Only**) using one of the following options:
 - Select the checkbox located in the Print column for **one** finalized Encounter or Well Visit.
 - Enter a date range. Note, there must be a finalized visit note in the specified date range.
 - Select the **All** radio button to create a CDA from the patient's earliest visit to the current day.
4. Click the **CDA** button.



Medical Records: MARY TESTPATIENT (99)

Medical Records Search Print Send Messages **CDA** Show CCR dialog

Basic Search Criteria:
 Patient(s): All One
 Report criteria: --Encounter Note Include private records (EFR) Include invalidated Rebuild notes
 Report dates: All Latest 24 months to 8/15/2019 to 8/16/2019

Advanced Search Criteria Grid View Lateral View

Record Type	Date	Age on Date	Record Content	Primary DX	View Staff
<input type="checkbox"/> Encounter	03/12/2019	3 yrs. 9 mos.	Patient	H66.42 Suppurative o...	THEO WARNER, MD
<input type="checkbox"/> Encounter	01/12/2016	7 mos. 26 days	Patient	F90.1 ADHD, predomi...	DEMO DOCTOR
<input checked="" type="checkbox"/> Well Exam	05/13/2019	3 yrs. 11 mos.	Patient	Z00.129 Encounter fo...	SLOANE KNOX, MD

Lines/record: 1 Select All Clear All Record Content

Record Content:
 double click to expand
Patient Demographics
 Name: MARY TESTPATIENT
 Date of birth: 05/16/2015 Sex: F
 Language: ENGLISH
 Race: Unknown
 Ethnicity: Unknown
Visit Information
 Date-time: 03/12/2019 @ 09:51 am
 Location: Primary Location
Chief Complaint
 (near main)

Entries: 3
 Patient DOB: 05/16/2015 Registration date: 05/16/2000 0.81 seconds

5. Continue to **Save** or **Send** the CDA (below):

Save the CDA

In order to save a CDA, the logged in user must have permission **Admin_CDA_Export_Single**.

1. In the Confirm window, click the **Save** button. The Select Folder for CDA Export window opens to the default file location to save the CDA locally. It is recommended to save the file to a folder with the best level of security available to safeguard patient Protected Health Information (PHI). A copy of the CDA will also be saved in **Document Management** under one of the following Image Categories based on the CDA Type:
 - CDA Type: CCD saves to Image Category: **CDA**.
 - CDA Type: Referral Notes saves to Image Category: **Referral Letter**.

Send the CDA

In order to send a CDA, the logged in user must have a secure Direct Messaging email address. When sending a CDA, the CDA is also saved in Document Management with the Image Category :Referral Letter.

1. In the Confirm window, click the **Send** button. The Message window opens with the subject, message, and attachment populated. A file can be removed by clicking the **X** in the Drop column.
 2. Complete the **To:** field:
 - a. Click the **Address Book** button  to open the Choose Recipients window. Direct Message recipients are display with the Direct Recipient icon  to the left of their name.
 - b. Select the checkbox in the Send column for the intended recipient.
 - c. Click the **OK** button.
 3. Add additional information to the Message field, if necessary.
 4. Click the **Send** button. The Direct Message with attachment is sent to the external recipient.
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