

Referrals and Transitions of Care FAQs

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How can I sort referrals with multiple scanned documents attached to show latest to oldest?

When reviewing the list of referrals for a patient, the Referrals/Trans tab will always display the date order from most recent to oldest. Below is instruction on how to change the order from the oldest to the most recent date.

1. From the patient chart, click the **Referrals/Trans** tab.
2. Click the **Date** column to change the sort order.



Note: Response to a Referral or a Tracking Entry cannot be sorted in the Referrals/Trans tab when attached to a referral.

To view scanned documents attached to a referral and change the date order, follow the instruction below.

1. From the patient chart, click the **Referrals/Trans** tab.
2. Click the **Scanned Records** tab.
3. Click the **Date** column to change the sort order.

What is a CDA?

CDA stands for Clinical Document Architecture. It is a standard electronic document in XML that defines the structure of certain medical records including summaries and encounter notes.

The term C-CDA is often used interchangeably, which stands for Consolidated Clinical Document Architecture. The purpose of the C-CDA is to include all clinical documents and CDA templates within one C-CDA document template.

CDAs can only be sent electronically to external contacts who have a Direct Email Address entered into the Address Book of OP.

What is the difference between a one-time and recurring export job?



Warning: This information is intended only for clients who are using the IntelliChart portal.

A one-time job runs for the Export Date and Time specified by the user. For example: This Wednesday at 9:00 PM.

A recurring job runs every time the user indicates until the Job End Date. For example: Day 1 of the month, every month at 9:00 PM.

Will the job I scheduled to run one-time from the Demographic Analysis and Recall show in the CDA Export?

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Yes, the user will see a new line under the One-time tab of the CDA Export that was created from the DAR. In addition, the user can expand the job to view the current stage of the job itself.

How do I set up the Export Frequency when I add a Recurring CDA Export Job?

Warning: This information is intended only for clients who are using the IntelliChart portal.

The Export Frequency field contains an **ellipsis** button  that launches Cron Maker. After launching Cron Maker:

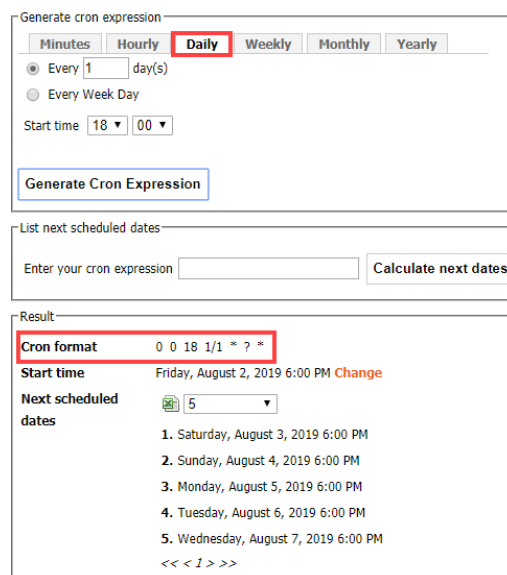
1. Choose whether they'd like the job to run Daily, Weekly, or Monthly.
2. Complete the frequency information in the Generate Cron Expression section.
3. Click the **Generate Cron Expression** button. Cronmaker provides a Cron format within the Result box.
4. Copy and paste the Cron format to the Export Frequency field.

What is Cron Maker?

Warning: This information is intended only for clients who are using the IntelliChart portal.

Cron Maker is a utility that helps to build a Cron Expression that is entered in the Export Frequency field of a Recurring CDA job. This will determine how frequently the recurring job will run.

Daily



Generate cron expression

Minutes Hourly **Daily** Weekly Monthly Yearly

Every 1 day(s)

Every Week Day

Start time 18 00

Generate Cron Expression

List next scheduled dates

Enter your cron expression Calculate next dates

Result

Cron format 0 0 18 1/1 * ? *

Start time Friday, August 2, 2019 6:00 PM [Change](#)

Next scheduled dates

1. Saturday, August 3, 2019 6:00 PM
2. Sunday, August 4, 2019 6:00 PM
3. Monday, August 5, 2019 6:00 PM
4. Tuesday, August 6, 2019 6:00 PM
5. Wednesday, August 7, 2019 6:00 PM

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Weekly

Generate cron expression

Minutes Hourly Daily **Weekly** Monthly Yearly

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Start time 18 00

Generate Cron Expression

List next scheduled dates

Enter your cron expression Calculate next dates

Result

Cron format 0 0 18 ? * FRI *

Start time Friday, August 2, 2019 6:00 PM [Change](#)

Next scheduled dates

1. Friday, August 9, 2019 6:00 PM

2. Friday, August 16, 2019 6:00 PM

3. Friday, August 23, 2019 6:00 PM

4. Friday, August 30, 2019 6:00 PM

5. Friday, September 6, 2019 6:00 PM

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Monthly

Generate cron expression

Minutes Hourly Daily Weekly **Monthly** Yearly

Day 1 of every 1 month(s)

The First Monday of every month(s)

Start time 14 00

Generate Cron Expression

List next scheduled dates

Enter your cron expression Calculate next dates

Result

Cron format 0 0 14 1 1/1 ? *

Start time Thursday, August 1, 2019 2:00 PM [Change](#)

Next scheduled dates

1. Sunday, September 1, 2019 2:00 PM

2. Tuesday, October 1, 2019 2:00 PM

3. Friday, November 1, 2019 2:00 PM

4. Sunday, December 1, 2019 2:00 PM

5. Wednesday, January 1, 2020 2:00 PM

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How long in advance can I set up a recurring CDA Export Job?

Warning: This information is intended only for clients who are using the IntelliChart portal.

A user can select a Job End Date up until one year from the current date.

Why am I being prompted to schedule my export?

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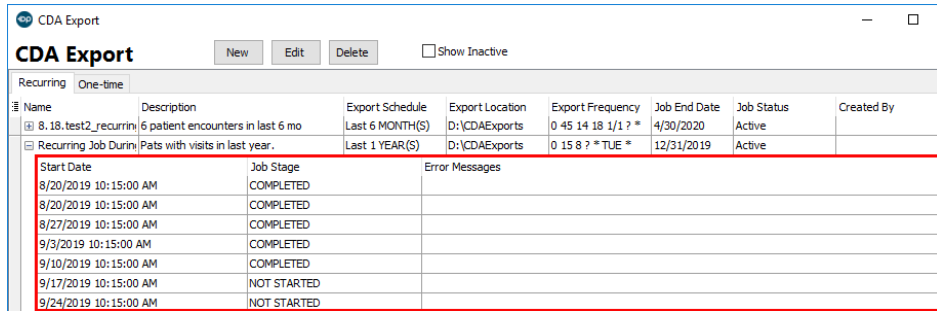
When exporting CDAs from the Demographic Analysis and Recall in bulk, the export job could take some time to run, depending on how large the export job is. OP offers a prompt for the user to schedule the job to run at a specific time in the background.

The job can be scheduled for the same day, should the user need to receive the export quickly.

How do I know if a job ran successfully?

Warning: This information is intended only for clients who are using the IntelliChart portal.

Each job in the CDA Export window can be expanded by clicking **+** to the left of the Job Name to display the details of the job. These details include the Job Stage. The Job Stages are: Not Started, Running, Completed or Failed.



CDA Export							
Recurring		One-time					
Name	Description	Export Schedule	Export Location	Export Frequency	Job End Date	Job Status	Created By
8.18.test2_recurrin	6 patient encounters in last 6 mo	Last 6 MONTH(S)	D:\CDAExports	0 45 14 18 1/1 ? *	4/30/2020	Active	3
Recurring Job Durin	Pats with visits in last year.	Last 1 YEAR(S)	D:\CDAExports	0 15 8 ? * TUE *	12/31/2019	Active	3
Start Date	Job Stage	Error Messages					
8/20/2019 10:15:00 AM	COMPLETED						
8/20/2019 10:15:00 AM	COMPLETED						
8/27/2019 10:15:00 AM	COMPLETED						
9/3/2019 10:15:00 AM	COMPLETED						
9/10/2019 10:15:00 AM	COMPLETED						
9/17/2019 10:15:00 AM	NOT STARTED						
9/24/2019 10:15:00 AM	NOT STARTED						

How do I manage a recurring CDA export job?

Warning: This information is intended only for clients who are using the IntelliChart portal.

Recurring jobs can be edited, canceled, or deleted from the CDA Export window.

Edit a Recurring Job

Select the job that needs to be edited, and click the **Edit** button. You can then edit any fields on the job. However, the Job Type **cannot** be changed from *One Time* to *Recurring* and visa versa. All edits made to the report criteria are saved in the Audit Trail.

Cancel a Recurring Job

Select the job that needs to be cancelled, and click the **Edit** button. You can then change the status of the job to **inactive**, and click **Save** to save the change.

Delete a Recurring Job

Select the job to delete, and click the **Delete** button. All deletions are saved in the Audit Trail.

What does it mean if a job stage says failed?

Warning: This information is intended only for clients who are using the IntelliChart portal.

A *Failed* Job Stage means that something hindered the service from running the job successfully. There will be an error message to provide you with more information.

How do I choose the Export Location for Data Export when I add a CDA Export Job?



Warning: This information is intended only for clients who are using the IntelliChart portal.

The Export Location differs between On-Premise clients and Cloud clients.

On-Premise

The location entered must be a folder that it is located on your gdb_common. We recommend that you create a folder on the gdb_common specifically for your CDA exports. Consequently, the path that you would enter in the Export Location field would be "C:\OP\gdb_common\[Folder Name you created]". Additional folders will be created for each run of the job. The name of the folder will include the Job Name and Date. The folder will contain all exported CDAs.

In addition to the local file location, On-Premise users will use the Export Location to generate a location you want to save your exported files on S3 which is within your Cloud Storage. You can access these exported files by following the instructions [here](#).

If the Export Location is left blank, the CDA will not be saved locally. However, the job will create a folder with the JOBNAME_DATE in S3.

Cloud

The Export Location chosen is the location you wish to export your CDAs on your Cloud Storage (S3). You can access these exported files by following the instructions [here](#).



Note: Avoid these characters when saving a location: { }, ^, %, ` , [, " , > , < , ~ , # , | , and non-printable ASCII characters (128–255 decimal characters).

Why can't I choose more than one Encounter or Well Visit in Medical Records to create a C-CDA?



Warning: This information is intended only for clients who are using the IntelliChart portal.

There are limitations with the API call that OP makes to build the C-CDA through Intelichart. This API call is dependent upon getting an Encounter by date or by date range. It cannot create one C-CDA for two different dates. Here are some options:

- If the Encounters or Well Visits dates are consecutive you can use the date range fields at the top of the window to input the dates. Do not select anything within the grid, then click the CDA button. This will create one CDA for the encounters within the date range you selected.
 - **Example:** You want to choose encounters from 3/15/19 and 4/1/19. There are no other Encounters or Well Visits within that time frame, so these dates can be entered as the date range within Medical Records to create a C-CDA with both visits.
- If the Encounters or Well Visits you want to select are not consecutive, then you will need to create separate C-CDAs.
 - **Example:** A patient has a total of 4 encounters. The dates are 3/15/19, 4/1/19, 5/3/19, and 7/6/19. Only 3 of them are wanted for the C-CDA. To do this, one C-CDA can be created using the date range of: 3/15/19-4/1/19 and another C-CDA can be created for for 7/6/19.

How do I export a CDA from Document Management?

From Document Management, users can either search for and select the patient, or use the Search for Documents window to search for all CDA documents. Once the CDA is located:

1. Click to select the CDA that will be exported.
2. Click the **Export** drop-down menu located at the top of the window.
3. Select **Export Document**.
4. Select the destination to which the CDA should be exported and click the **Save** button.

How do I use WinSCP to make an SFTP Connection to view documents I exported on S3 (Cloud Storage)?



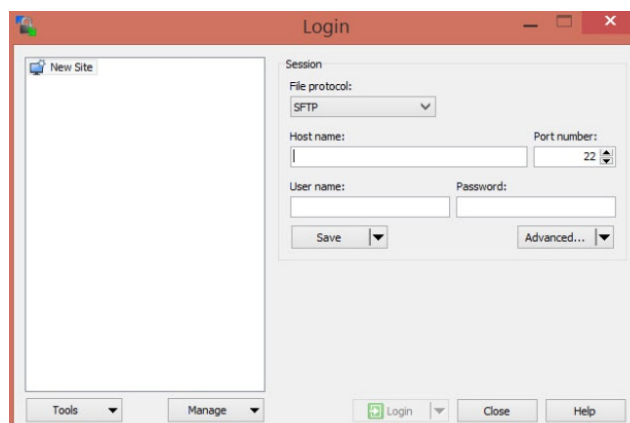
Warning: This information is intended only for clients who are using the IntelliChart portal.

OP takes PHI and security very seriously! That is why accessing your S3 (Cloud Storage) location will be done through a Secure File Transfer Protocol (SFTP).

Please contact OP Support by emailing support@officepracticum.com for more information and to enable this feature. OP Support will get in touch with the correct team to expedite your request.

Once credentials have been acquired, follow the directions below to download and use WinSCP to access your documents exported to S3:

1. Go to <https://winscp.net>.
2. Click the **Download Now** button.
3. Click the **Download WinSCP** button, or choose the **Other Downloads** if needed. This places an executable in your Downloads folder.
4. Click on the executable to proceed through the installation process. Once the installation process is completed, you will receive a Login window.



5. Complete the following fields:

- **File Protocol:** Leave the default of SFTP.
- **Host name:** Enter the URL Login provided in the email received from OP.
- **User name and Password:** Enter the user name and password provided in the email received from OP.

6. Click the **Login** button.

To learn more about WinSCP, please visit their [Help Documentation](#).

Why don't I see the external recipients listed when I try to send a Direct Message?

In order to see external recipients listed in the To: field of the message, the logged in user must also have a valid DIRECT email address populated in the Address Book.

What kind of attachments does OP accept?

All attachments are saved in Document Management with the Item Type :REFERRAL LETTER. The following attachment types open the Clinical Reconciliation window:

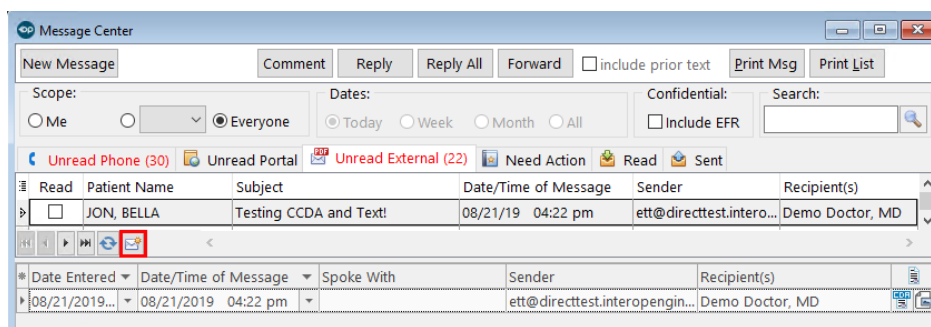
- CDAs (xml)

The following attachment types open the Document Management window:

- Text
- PDF
- HTML

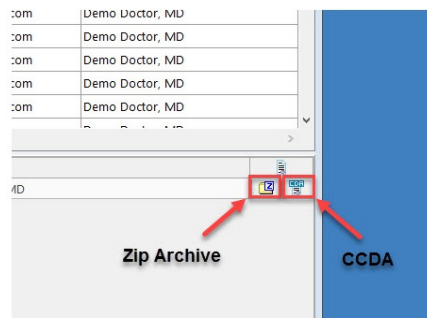
How do I fetch external messages?

External Messages are fetched from the Unread External tab of the Message Center. Simply click the Fetch External Messages button located in the bottom section of the window to retrieve External Messages.



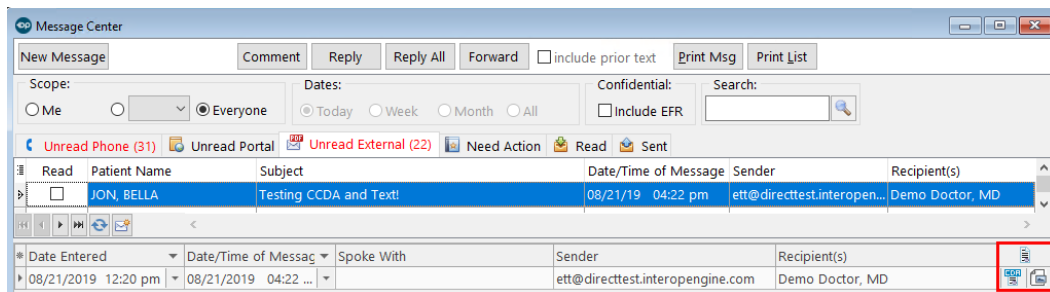
Why is there a blank attachment that opens up in Document Management with a green icon that says Zip?

When XDM (Zip) attachments are received, OP unzips the file so the CDA becomes available to the user. However, we do not remove the zip archive. Because of this, you see a blank document. Confirm you are selecting the CDA button in the message window.



How do I know if a Direct Message includes an attachment?

If a Direct Message includes an attachment, it will be indicated in the message section of the Message Center window once a message is selected.



Why does the CDA I'm creating say it is not available yet?

It is required that a patient's clinical data is in the OP Patient Portal for a CDA to immediately generate. If the patient has not been issued a PIN, an appointment has not been scheduled, or a finalized patient note has not been created, then it is possible that the patient's clinical data is not in the OP Patient Portal.

When it is initiated by the user to create a CDA (either saving or sending) and the patient's clinical data is not already on the OP Patient Portal, that will act as a trigger to send the patient's clinical data to the OP Patient Portal. At that point, OP will notify the user that the CDA is not ready. Since more patients' clinical data will be added to the OP Patient Portal as time goes on, you should find the workflow described below to occur less and less.

- When saving a CDA as an export, if the CDA is not ready, OP will notify the user. The user should continue to work in OP as needed. After about 3-5 minutes:
 1. Check back in Document Management.
 2. Select the exported CDA. If for some reason it is still not ready, OP will notify the user when the user tries to click on the CDA to view. If it is ready, the CDA can be exported directly from Document Management and saved to a local secure location on the workstation.
- When sending a CDA as an attachment on a Direct Message, if the CDA is not ready, OP will notify the user. The user should keep the external outgoing message window open by either keeping the window in the background or minimizing it in OP. After about 3-5 minutes:
 1. Check back into the message, and try to click Send. If the attachment is ready, then the message will be sent successfully. If it is still not ready, OP will notify the user.