

Send a CDA

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About

In addition to being able to send a CDA for a patient from a finalized Encounter or Well Visit or from a patient's Medical Records, a CDA can also be sent for a patient from the Message Center and from a Referral.

The process of sending a CDA file to an external recipient is known as Transition of Care (TOC). In order to be able to transmit Direct Messages, both the user (sender) and the recipient must have a DIRECT email address entered in their Address Book record. Additionally, 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.

Send a CDA from the Message Center

Path: Clinical or Practice Management tab > Send Message button

Path: Clinical, Practice Management, or Billing tab > Patient Chart > Messages > New Message button

1. Navigate to the Message window for the patient following one of the paths above.
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. In the Subject field, enter a subject for the message.
4. In the Message field, enter the message content.
5. Add the attachment:
 - a. Click the **Attachment** button . The Search for Documents window opens.
 - b. Select the file to attach.
 - c. Click the **Use Selected Document(s)** button. The file is listed in the Attachments field. A file can be removed by clicking the **X** in the Drop column.
6. Click the **Send** button. The Direct Message with attachment is sent to the external recipient.


Send a CDA for a Referral

In order to send a CDA from a referral, there must be a finalized Encounter or Well Visit note in the patient's chart.

Path: Clinical or Practice Management tab > Schedule button > Tracking radio button > Task button > Double-click Referral task

Path: Clinical, Practice Management, or Billing tab > Patient Chart > Referrals/TOC > New button

1. Navigate the Referrals window following one of the paths above.
2. Select the **Referral to Specialist** radio button located at the top of the window.
3. Complete the **Referred to:** field:

- a. Click the **Address Book** button  to open the Address Book window.
 - b. Select the **Show Only Contacts w/ Direct Addresses** checkbox.
 - c. Highlight the recipient and click the **Select** button.
4. Complete the remainder of the Referral/Transition of Care Details, including the reason for the referral.
 5. Select the checkbox to **Include Summary**.
 6. Click the **Send** button. The Message window opens with the recipient and attachment populated. A file can be removed by clicking the **X** in the Drop column. Additional information can be added to the Message field, if necessary.
 7. Click the **Send** button.



Note: If you try to send to someone who does not have a secure Direct Email address set up in the address book, you will get the following "**Warning:** The selected recipient does not have a Direct email address in your address book. Please choose someone who does on the New Message Form." Add the recipient's Direct Email address by following the steps [here](#) or select someone else from the address book.

8. A new message form will open associated with the current patient, the selected provider in the "To" field, a standard subject line, and a standard message body. A document icon is also visible and represents the message attachment with the patient's electronic clinical document to be forwarded to the provider.
9. *(Optional)* Edit the **Subject** or **Message** body with additional details.
10. *(Optional)* From the **To** field add additional recipients as necessary (internal or external).
11. Click the **Send** button.



Note: The **Delivery Status** field, located on the Insurance/Admin tab will update when the DIRECT message was successfully received. In addition, the checkbox will be selected for **Specialist confirms receipt of this referral** when the DIRECT message was successfully received.