

Sharing Clinical Records: DSM & CDE

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2023 Users' Conference
Burlington, VT



- Understand how C-CDA documents support the exchange of clinical information
- Explain how Direct Secure Messaging (DSM) and Clinical Document Exchange (CDE)
 - can be used to send and receive clinical records
 - are different yet complementary solutions
- Identify the steps for getting your practice started with DSM and CDE

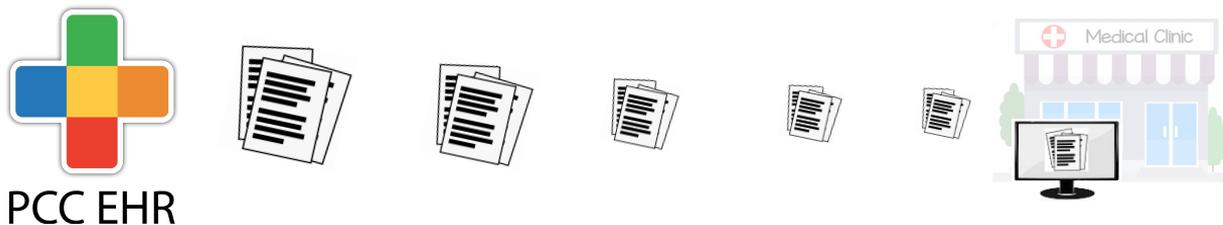
What is Interoperability?

Systems are today, interoperability is the ability of different computers and software systems to communicate, exchange data, and use the data that has been exchanged.



What is Interoperability?

Direct Secure Messaging and Clinical Document Exchange are two ways that PCC EHR is interoperable.



What is a C-CDA?



Clinical Document Architecture (CDA)

This is a standard.

Consolidated-Clinical Document Architecture (C-CDA)

This is an implementation guide that uses the CDA standard to specify a collection of clinical documents.

There are 12 types of C-CDA documents:

Care Plan

Consultation Note

* Continuity of Care

Diagnostic Imaging Report

Discharge Summary

History & Physical

Operative Note

Procedure Note

Progress Note

Referral Note

Transfer Summary

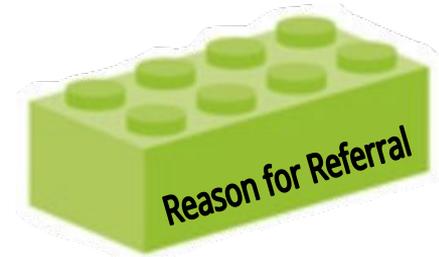
Unstructured Document

* Generated by PCC EHR

C-CDA Documents

C-CDA Documents contain sections.

- Sections are like building blocks.
- There are 70 sections!



Examples

Medications	Vital Signs	Implants
Immunizations	Encounters	Social History
Family History	Nutrition	Problem
Procedures	Allergies & Intolerances	Review of Systems

For each document type, some sections are required and some are optional.

Care Plan

Required

Goals

Health
Concerns

Optional

Health Status
Eval/Outcomes

Interventions

C-CDAs can include additional sections, even above and beyond the sections defined as optional.

For each document type, some sections are required and some are optional.

Continuity of Care

Required

Allergies & Intolerances	Results
Medications	Social History
Problem	Vital Signs
Procedures	

Optional

Advance Directive	Medical Equipment
Encounters	Mental Status
Family History	Nutrition
Functional Status	Payers
Immunizations	Plan of Treatment

Continuity of Care Document (CCD)

In PCC EHR, we also refer to this document as the **Summary of Care Record**.

Summary of Care Record Todd Gack (10 yrs, 9 mos; 08/24/12; M)

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document id	6263f09d-0a01-4934-bcb2-bffaf1feea2
Document Created:	June 19, 2023, 08:50:46 -0400
Performer (primary care provider)	
Author	PCC EHR
Contact info	Work Place 20 Winoski Suite 7 Winoski, Tel: (800) ;
Document maintained by	PCC Pedia
Contact info	Work Place 20 Winoski Suite 7 Winoski, Tel: (800) ;

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- [Social history](#)
- [Care Plan](#)
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- [Encounters](#)
- [Reason for Referral](#)
- [Functional status assessment](#)
- [Payers](#)

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- [Reason for Referral](#)
- [Functional status assessment](#)
- [Payers](#)

C-CDAs combine human-readable text with machine-processable data.

```
<patient>
  <name><given>Todd</given><given>J</given><family>Gack</family></name>
  <administrativeGenderCode code="M" codeSystem="2.16.840.1.113883.5.1"/>
  <birthTime value="20080903"/>
  <maritalStatusCode nullFlavor="NI" codeSystem="2.16.840.1.113883.5.2"/>
  <raceCode nullFlavor="OTH" displayName="Prefers not to answer"/>
  <ethnicGroupCode code="2186-5" codeSystem="2.16.840.1.113883.6.238" codeSystemName="Race and Ethn
  displayName="Not Hispanic or Latino"/>
  <languageCommunication>
    <languageCode code="eng"/>
    <proficiencyLevelCode nullFlavor="NI" codeSystem="2.16.840.1.113883.5.61"/>
    <preferenceInd value="true"/>
  </languageCommunication>
</patient>
</patientRole>
</recordTarget>
<author>
  <time value="20190612140537-0400"/>
  <assignedAuthor>
    <id root="2.16.840.1.113883.4.6"/>
    <addr use="WP"><streetAddressLine>20 Winooski Falls Way</streetAddressLine><streetAddressLine>Suite
    streetAddressLine</city>Winooski</city><state>VT</state><postalCode>05404-2228</postalCode><country
    addr>
    <telecom value="tel:(800) 722-7708" use="WP"/>
  <assignedAuthoringDevice>
    <manufacturerModeLName>PCC EHR</manufacturerModeLName>
    <softwareName>PCC EHR</softwareName>
  </assignedAuthoringDevice>
</assignedAuthor>
</author>
```

Summary of Care Record Todd Gack (10 yrs, 9 mos; 08/24/12; M)

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document Id	6263f094-da01-4934-bcb2-bffa1f1eeaa2
Document Created:	June 19, 2023, 08:50:46 -0400
Performer (primary care provider)	
Author	PCC EHR
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708
Document maintained by	PCC Pediatric Test Associates
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708

Table of Contents

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- Social history
- Care Plan
- History of immunizations
- Encounters
- Reason for Referral
- Functional status assessment
- Payers

The data you share is only as good as the data you put into the system.

- Enter the data
- Be accurate
- Be complete
- Don't use discrete data fields creatively

What is Direct Secure Messaging?

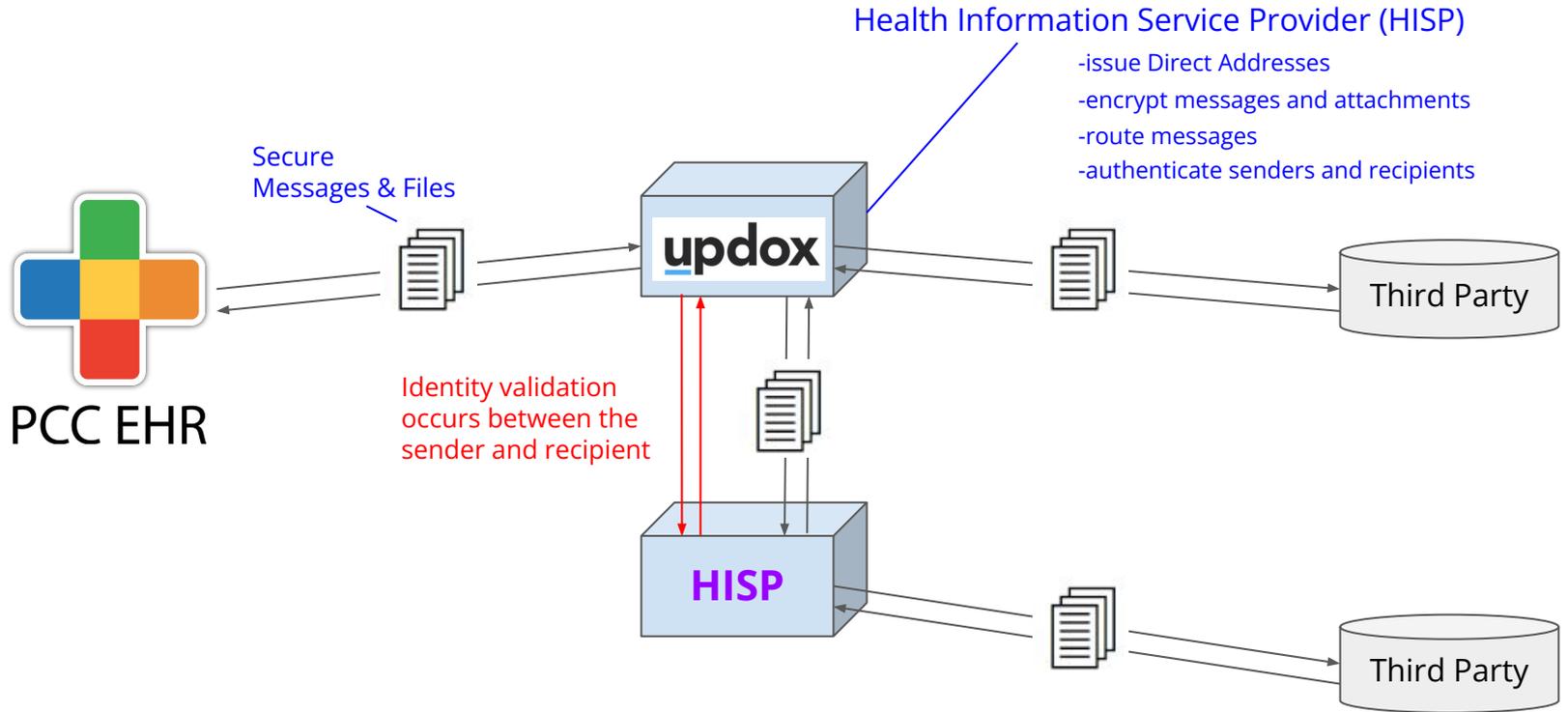
Direct Secure Messaging is...



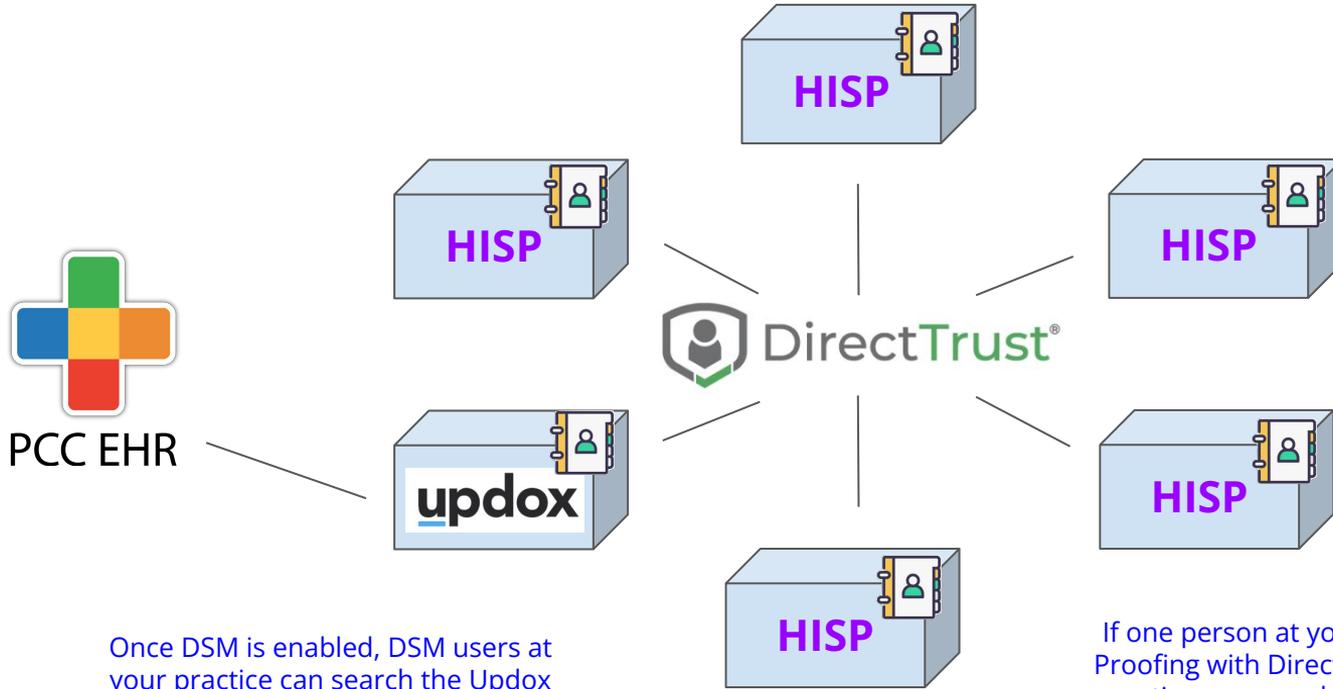
really secure email
meant for the exchange of health information.

How does Direct Secure Messaging work?

Direct is a national secure messaging standard.



The DirectTrust Network



Once DSM is enabled, DSM users at your practice can search the Updox directory for Direct addresses.

If one person at your practice completes ID Proofing with DirectTrust, DSM users at your practice can search and be visible within the DirectTrust directory.

Sending a Direct Secure Message in PCC EHR

The screenshot shows the PCC EHR software interface. The 'Reports' menu is open, and 'Summary of Care Record' is highlighted with a red arrow. The main window displays patient information for Todd Gack, including age (10 yrs, 9 mos) and date of birth (08/24/12). The interface includes sections for Medical History, Medication History, Recent and Upcoming Appointments, Siblings, Reminders, Problem List, and Allergies. At the bottom, there are buttons for 'Add Phone Note', 'Add Portal Message', 'Close', 'Save', and 'Save + Exit'. The status bar at the bottom indicates 'Signed in: jmarsala at Winooski'.

Sending a Direct Secure Message in PCC EHR

Summary of Care Record

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document Id	6073507f-a309-4493-b845-366e3381bf14
Document Created:	June 19, 2023, 17:04:39 -0400
Performer (primary care provider)	
Author	PCC EHR
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708

Select a referral or outbound transition of care:

06/19/23 Referral: Dermatology

Related to an outbound transition of care

06/19/23 Referral: Dermatology

Not related to a transition of care

Save as a PDF file

Save as a C-CDA file

Send via Direct Secure Messaging:

Cancel Send to...

Select referral or transition of care

Option to limit the information shared

Select Direct Secure Messaging



Sending a Direct Secure Message in PCC EHR

Recipient's Direct address

Subject line

Message

Direct Secure Message

To: 🔍 Search

From: PCC PCC (pcc@scone.qa.pcc-direct.com)

Subject:

Message:

Attachments (maximum 50MB):
Continuity of Care Document (13 KB)



Receiving a Direct Secure Message in PCC EHR



File Edit Reports Tools Configuration Window Help

PCC EHR

Schedule (17) Visit Tasks (99+) E-lab Results (40) Rx Queue (0) **Messaging (3)** Signing (99+)

FIND

Tasks: 3

Completed	Date	Due	Patient	Subject	Task	To	Docs	Billing Status	Signed
	06/20/23 7:43am		Puddy, David	Direct Message - Referral	Direct Secure Message	Fred Jones, M.D.			
	06/20/23 7:39am		Benes, Elaine	Direct Message - Requested data: Dermatology	Direct Secure Message	Fred Jones, M.D.			
	06/20/23 7:35am		Gack, Todd	Direct Message - CCD for Patient	Direct Secure Message	Fred Jones, M.D.			

Task: Direct Secure Message

Assigned User: Jones

Billing Status: All Billing Statuses

Due: 06/20/23

Days: All Last 1 days

Display: Not Completed

Save My Defaults

Page Up Page Down Page 1 / 1

Post Charges Open

1 0 0 Chat 1 PCC News Signed in: fred at Winooski

Filters

Receiving a Direct Secure Message in PCC EHR

Add the Message to the patient's chart

View attached C-CDAs and PDFs

The screenshot shows the PCC EHR interface with a 'Direct Secure Message' window open. The message details are as follows:

Message
Continuity of Care Document
rxactivity.pdf

Patient Information from the Continuity of Care Document
Patient Name: Todd Gack
DOB: 08/30/12
Sex: Male

Message
Date: 06/20/23
From: mark@bopeep7.qa.pcc-direct.com
To: fred@bopeep7.qa.pcc-direct.com
Subject: CCD for Patient
Message: Attached please find the patient's CCD.

Buttons: **View** **Save As** Continuity of Care Document: Continuity of Care Document
View **Save As** File: rxactivity.pdf

Below the message window, a 'Save As' dialog box is open, showing a folder icon and the text: **Save As** test-xdm2.zip (1/1 files extracted). Below this, there are two options: **View** and **Save As** Continuity of Care Document: ccda.xml.

On the right side of the interface, there is a table titled 'Select the patient to receive the Direct Secure Message.' with a 'Find' button. The table lists 'Best Matches for: Todd Gack 08/30/12 M'.

Last	First	DOB/Sex	Age	PCC
Gack	Todd	08/30/12	M 10y 9m	348
Caba	Todd	07/11/20	M 2y 11m	197
Dearment	Todd	04/21/99	M 24y 1m	291
Pintarch	Todd	11/24/03	M 19y 6m	184
Vastyan P.A.	Todd "Paige" David	12/07/22	M 6m 1w	384
Warner	Todd	06/04/14	M 9y	302

At the bottom of the message window, there are buttons: **Delete Message**, **Close**, and **Select**.

In 9.7, PCC EHR extracts C-CDAs and PDFs from zipped attachments.

Receiving a Direct Secure Message in PCC EHR

File Edit Reports Tools Configuration Window Help

PCC EHR

Todd Gack PCC# 3484

Medical Summary

Demographics

History

PCC eRx

Message: 06/20/23

Direct Secure Message

Direct Secure Message

Tasks

Summary: CCD for Patient

Message

Date: 06/20/23

From: mark@bopeep7.qa.pcc-direct.com

To: fred@bopeep7.qa.pcc-direct.com

Subject: CCD for Patient

Message: Attach please find the patient's CCD.

View Reconcile Save As Continuity of Care Document: Continuity of Care Document

View Save As File: rxactivity.pdf

▼ Tasks

Task select a task To select a user Due 06/20/23

Note

Task Completed At mm/dd/yy 12:00am By select a user

Add Task

Previous Next Close Save Save + Exit

1 0 0 Chat PCC News Signed in: fred at Winooski

Configure the DSM Protocol to include additional components

Reconciling a C-CDA in PCC EHR

Reconcilable C-CDA Sections

- Problems
- Medication Allergies
- Medications

Compare the C-CDA against the patient's chart and select items to import.

Reconciliation - Import Todd Gack 10 yrs, 9 mos 08/30/12 M

Select the problems, medications, and medication allergies from the Continuity of Care Document to import into the patient's chart.

Problems

Continuity of Care Document Problems

Add to EHR	Status	Problem	Onset	Resolved	Last Modified
<input checked="" type="checkbox"/>	Active	Overweight			
<input checked="" type="checkbox"/>	Active	Asthma			
<input type="checkbox"/>	Inactive	Wheezing			

PCC EHR Problem List

Status	Problem	Problem Note	Onset	Resolved	Last Modified
Active	Heart murmur				06/20/23

Medication Allergies

Continuity of Care Document Medication Allergies

Add to EHR	Status	Drug	Reaction	Onset	Last Modified
<input type="checkbox"/>	Inactive	Anaphylaxis caused by insect bite and/or insect sting			
<input checked="" type="checkbox"/>	Active	Allergy to latex		07/08/10	

PCC EHR eRx Allergies

Drug	Reaction	Onset	Last Modified
------	----------	-------	---------------

Medications

Continuity of Care Document Medications

Add to EHR	Status	Drug	Details	Last Modified
<input checked="" type="checkbox"/>	Active	Timolol 0.5 % Ophthalmic Gel Forming Solution	;	06/20/23
<input type="checkbox"/>	Inactive	Amoxicillin 875 mg PO Tablet	;	02/10/23

PCC EHR Medication History

Status	Drug	Formula	Details	Last Modified
Active	EPINEPHRINE 0.3 MG/0.3 ML (1:1,000) (ADULT) PEN INJECTOR		0.3 mg IM every 5 to 15 minutes PRN hypersensitivity reaction; do not exceed ...	

Warning: Imported Medication Allergies and imported Medications must be reviewed in PCC eRx to ensure that drug to allergy and drug to drug interactions are correctly represented.

DirectTrust Metrics

- In Q1 2023,
 - 2.7M Direct Addresses
 - 290K Organizations Served
 - 222M Messages Sent and Received
- 4 Billion Messages Sent and Received since 2014

Source: DirectTrust, directtrust.org

Direct Secure Messaging: Key Takeaways



Direct is a form of interoperability that provides the means to securely and efficiently share clinical records.



Direct is widely used and trusted in the healthcare industry.



Direct can be used for many purposes including but not limited to transitions of care and referrals.



Direct can save the time and resources that may be otherwise spent mailing, faxing, or scanning documents.



Clinical Document Exchange is...

a system of standards for publishing, cataloging,
and sharing clinical documents, which...

makes documents available for retrieval by
authorized parties across the healthcare ecosystem.



What is Clinical Document Exchange?

Organization seeking Documents

Organization that has Documents

Step 1 - Patient Discovery

Third party, do you know my patient?

Yes, one match.

No

Yes, multiple matches.

Step 2 - Find Documents

You seem to have my patient in your system.

What documents are available for my patient?

Here is a list of documents that are available for the patient you specified.

There are no documents for this patient.

Step 3 - Retrieve Documents

I've selected the document(s) I want.

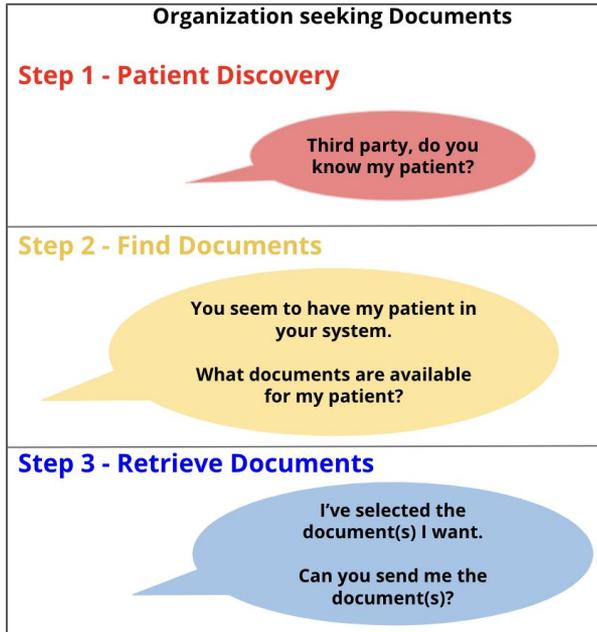
Can you send me the document(s)?

Here is/are the document(s) you requested.

I can't find the document(s).

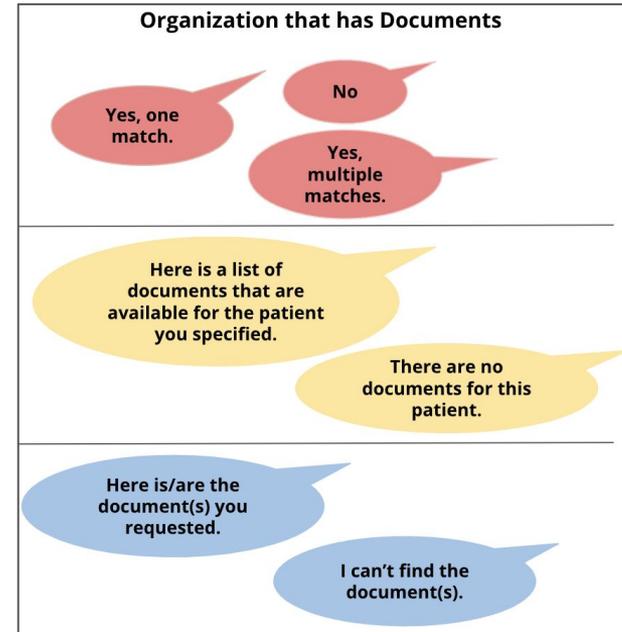
What is Clinical Document Exchange?

Initiator Role



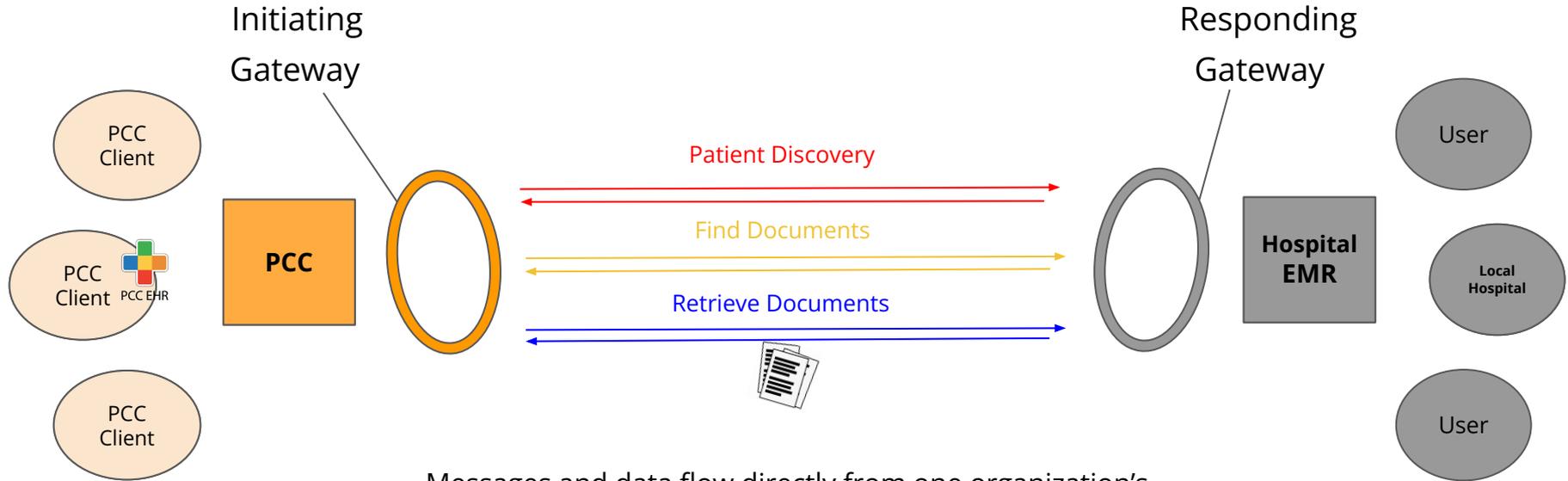
You can retrieve documents from other organizations.

Responder Role



Other organizations can retrieve documents from you.

How does Clinical Document Exchange work?



Messages and data flow directly from one organization's gateway to another, *not* through an intermediary.

Messages are safe and secure, protected by multiple layers of security.

Third party organizations *do not* have access to PCC clients' servers or systems.

What is Carequality?



- Carequality has defined a **framework** that allows participating entities to exchange documents.
- Carequality is a framework, **NOT** a network.
- PCC is a *Carequality Implementer*.
- If your practice decides to participate in Clinical Document Exchange, it becomes a *Carequality Connection*.

What other organizations are Carequality Implementers?



Who in my area is a Carequality Connection?

<https://carequality.org/active-sites-search/>

Search By Name: Search By City:
Search By State: Vermont Search By Zip:
Radius:

[CLEAR SEARCHES](#) [SEARCH](#)



Map Satellite

Organization Name	City	State
A3B: ACCEPTANCE, BELIEVING, BONDING	JOHNSON	VT
Addison County Home Health and Hospice	Middlebury	VT
ANDREA VAN BUREN REGAN	CHARLOTTE	VT
Annegret Schmitt-Johnson	Essex Junction	VT
Associates In Primary Care, LLC	RUTLAND	VT
BATTENKILL VALLEY HEALTH CENTER, INC.	ARLINGTON	VT
BERNADETTE SPENCER FAMILY HEALTH NP. PLLC	GAINESVILLE	VT
Border Pediatrics, PLLC	DERBY LINE	VT
BRADFORD PSYCHIATRIC ASSOCIATES LLC	RUTLAND	VT
Brattleboro Memorial Hospital	Brattleboro	VT

<< FIRST < PREVIOUS PAGE 1 OF 10 1 2 3 4 NEXT > LAST >>

Initiator Role: What organizations can I query for documents?

As organization has access in the directory

Default organization with no other at the

Clinical Document Exchange Configuration

Select default organizations to be queried for clinical documents.

Organization	Address
PCC Pediatric Test Associates (cake)	
Paradise Valley Community Hospital 4116 Rocket Drive, Golden Valley, MN 55427	
Maple Valley General Hospital 2611 Wexford Way, Clinton, SC 28328	
Goldvalley General Hospital 4322 Redbud Drive, Whitestone, NY 11357	
Tennessee Valley Pain Management 6130 Shallowford Rd, CHATTANOOGA, TN 37421-7215	
ARIZONA WOMEN'S HEALTH, PLLC 270 E HUNT HWY SUITE 10, SAN TAN VALLEY, AZ 85143-4963	
Grand Valley Neurology, Prof. LLC 744 HORIZON COURT, GRAND JUNCTION, CO 81506-3936	
Nashoba Valley Healthcare Group	

valley

Cancel Save

Initiator Role: How do I retrieve documents in PCC EHR?

Navigate to History and then the *Find Clinical Documents* component.



The screenshot shows the PCC EHR interface. The top menu bar includes File, Edit, Reports, Tools, Configuration, Window, and Help. The main title is 'Find Clinical Documents'. On the right, patient information is displayed: 'David Puddy 5 yrs, 5 mos 01/05/18 M'. Below this, there is a section for 'Healthcare Organizations to Query' with a sub-section for 'PCC Pediatric Test Associates (score)'. A table with columns 'Name', 'Date of Birth', 'Sex', and 'Address' is shown, with the message 'Patient not found' below it. The left sidebar contains a 'History' menu with options: Visit History, Immunization History, Flowsheets, Growth Charts, **Find Clinical Documents** (highlighted), Documents, and Billing History. At the bottom of the sidebar is a 'Create Visit' button. The bottom status bar shows 'Close', 'Save', and 'Save + Exit' buttons, along with system information: '37 3 2', 'Chat', 'PCC News', and 'Signed in: pcc at Winooski'.

Initiator Role: How do I retrieve documents for my patient in PCC EHR?

Organization should be

A default list of organizations

The screenshot displays the PCC EHR interface for finding clinical documents for a patient named David Puddy (PCC# 3483). The main window is titled "Find Clinical Documents" and includes a search bar and a "FIND" button. Below the search bar, there is a section for "Healthcare Organizations to Query" with a table of organizations. Two organizations are selected with checkmarks:

Query	Organization	Address	Last Queried
<input checked="" type="checkbox"/>	PCC Pediatric Test Associates (score)	20 Winooski Falls Way, Winooski, VT 05404-2228	06/23/23
<input checked="" type="checkbox"/>	PCC Pediatric Test Associates (muffin)	20 Winooski Falls Way, Winooski, VT 05404-2228	never

Below the table is a text input field labeled "Add another healthcare organization" and a "Find Patient" button. A red arrow points to this button. The results section, titled "PCC Pediatric Test Associates (score)", shows "Patient not found". The interface also includes a sidebar with navigation options like "Medical Summary", "Demographics", "History", and "Find Clinical Documents". At the bottom, there are buttons for "Close", "Save", and "Save + Exit", along with a status bar showing "Signed in: pcc at Winooski".

Initiator Role: How do I retrieve documents for my patient in PCC EHR?

Confirm the patient match then proceed to Find Documents.

The screenshot shows the PCC EHR interface. At the top, the patient name is David Puddy, 5 yrs, 5 mos, 01/05/18, M. The main area is titled 'Find Clinical Documents' and shows a search for 'David Puddy' with PCC# 3483. The interface lists healthcare organizations to query, including PCC Pediatric Test Associates (scone) and PCC Pediatric Test Associates (muffin). A table for PCC Childrens Hospital shows two entries for Erin Marie Zeller, with the second entry checked. A 'Find Documents' button is highlighted with a mouse cursor. The bottom of the screen shows a 'Create Visit' button and a status bar with 'Signed in: pcc at Winooski'.

PCC EHR Find Clinical Documents David Puddy 5 yrs, 5 mos 01/05/18 M

David Puddy PCC# 3483

Medical Summary
Demographics
History
Visit History
Immunization History
Flowsheets
Growth Charts

Healthcare Organizations to Query

PCC Pediatric Test Associates (scone) Last updated: 06/23/23 12:37pm Refresh

Name	Date of Birth	Sex	Address
Patient not found			

PCC Pediatric Test Associates (muffin) Last updated: 06/23/23 12:39pm Refresh

Name	Date of Birth	Sex	Address
<input checked="" type="checkbox"/>	David Puddy	01/05/2018	M 1872 3rd Avenue, New York, NY 10029

PCC Childrens Hospital Last updated: 08/07/20 11:10am Refresh

Name	Date of Birth	Sex	Address
<input type="checkbox"/>	Erin Maria Zeller	01/30/2019	F 5539 Galway Ct, Ely, VT 05044
<input checked="" type="checkbox"/>	Erin Marie Zeller	01/30/2019	F 43 W Main Street, Island Pond, VT 05846

Find Documents

Create Visit Close Save Save + Exit

37 3 2 Chat PCC News Signed in: pcc at Winooski

Initiator Role: How do I retrieve documents for my patient in PCC EHR?

Document date and type, status, and last retrieved date display for each available document.

The screenshot displays the PCC EHR interface for finding clinical documents. The patient is David Puddy, PCC# 3483, aged 5 years, 5 months, with a birth date of 01/05/18. The interface includes a search bar with a 'FIND' button and a sidebar with various menu items. A red arrow points to the 'Find Clinical Documents' menu item. The main content area shows search results for 'PCC Pediatric Test Associates (muffin)' and 'PCC Pediatric Test Associates (scone)'. The 'muffin' results show a document dated 06/23/2023, titled 'Summary of Episode Note', with a status of 'Approved' and a last retrieved date of 'never'. The 'scone' results show 'Patient not found'.

Document Date	Document Type	Status	Last Retrieved
06/23/2023	Summary of Episode Note	Approved	never

Initiator Role: How do I retrieve documents in PCC EHR?

To open the document, click View.

To immediately reconcile the document, click Reconcile.

The screenshot displays the PCC EHR interface for finding clinical documents. The top navigation bar includes 'File', 'Edit', 'Reports', 'Tools', 'Configuration', 'Window', and 'Help'. The main header shows the patient name 'David Puddy', age '5 yrs, 5 mos', and birth date '01/05/18'. The left sidebar contains a navigation menu with options like 'Medical Summary', 'Demographics', 'History', 'Visit History', 'Immunization History', 'Flowsheets', 'Growth Charts', 'Find Clinical Documents' (highlighted), 'Documents', and 'Billing History'. The main content area is titled 'Find Clinical Documents' and includes a search filter for 'PCC Pediatric Test Associates (muffin)'. Below the search criteria, there are checkboxes for 'Include previously retrieved documents' and 'Include deprecated documents'. A table lists the search results for 'David Puddy', with columns for 'Document Date', 'Document Type', 'Status', and 'Last Retrieved'. A single document is listed with a date of '06/23/2023' and a type of 'Summary of Episode Note', with a status of 'Approved'. Two red arrows point to the 'View' and 'Reconcile' buttons for this document. Below the table, there is a 'Patient Match' section with a 'Patient not found' message. The bottom of the interface shows a status bar with 'Signed in: pcc at Winooski' and a 'Close' button.

Initiator Role: How do I retrieve documents in PCC EHR?

The document will be saved in Retrieved Documents category.

Additional actions are available at the bottom of the Document Viewer.

Document Viewer David Puddy 5 yrs, 5 mos 01/05/18 M

Thumbnails

1
2

Continuity of Care Document

Patient	David Puddy
Date of birth	January 5, 2018
Sex	Male
Race	
Ethnicity	
Contact info	Home: 1872 3rd Avenue New York, NY 10029, US Tel: 718-534-9232
Patient IDs	3483 2.16.840.1.113883.3.2402.400.100.15
Document Id	c581742c-6131-42ef-9acd-7adea6f70208
Document Created:	June 23, 2023, 12:50:03 -0400
Performer (primary care provider)	Elizabeth Casey
Author	PCC EHR
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708
Document maintained by	PCC Pediatric Test Associates
Contact info	Work Place: 20 Winooski Falls Way Suite 7 Winooski, VT 05404-2228, US Tel: (800) 722-7708

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- History of diagnostic tests and/or laboratory data
- Visit Notes
- Social history
- Care Plans
- History of immunizations
- Encounters
- Discharge Disposition

◀ Page 1 of 2 ▶

c581742c_6131_42ef_9acd_7adea6f70208.pdf 06/23/23 02:11pm

Rotate Page Rotate Document Fit Width + Zoom to Fit

Reconcile Add to Portal Message Print Sign Edit Close

Tags

Title: Summary of Episode Note
Category: Retrieved Documents
Pages: 2
Source: PCC Pediatric Test Associates (muffin)

Last Modified: pcc 06/23/23 2:11 pm

► **Communication Preferences**
► **Account Demographics**

Initiator Role: What documents can I retrieve from Carequality-enabled organizations?



Each Carequality Implementer determines what types of documents will be made available for retrieval.

The vast majority of documents being exchanged via the Carequality

Responder Role: Who can retrieve documents from my practice?



-  Only other **Carequality-enabled** organizations can query for and retrieve clinical documents.
-  Carequality Implementers have been **vetted** as legitimate entities in healthcare and are **authorized** to participate in exchange activities within the Carequality community.
-  PCC shares your patients' clinical documents for **treatment** purposes *only*.

Responder Role: What documents can be retrieved from my practice?

One **Summary of Care (CCD)** document per patient is available for retrieval (when patient consent is set to Yes).

When changes occur to a patient's record, an updated copy is made available for retrieval.

PCC EHR does this automatically!

Summary of Care Record Todd Gack (10 yrs, 9 mos; 08/24/12; M)

Continuity of Care Document

Patient	Todd Gack
Date of birth	August 24, 2012
Sex	Male
Race	
Ethnicity	
Contact info	
Patient IDs	3484 2.16.840.1.113883.3.2402.400.100.16
Document Id	6263f09d-0a01-4934-bcb2-bffaf1feeea2
Document Created:	June 19, 2023, 08:50:46 -0400
Performer (primary care provider)	
Author	PCC E
Contact info	Work 1 20 Wir Suite 1 Winoo Tel: (8
Document maintained by	PCC P
Contact info	Work 1 20 Wir Suite 1 Winoo Tel: (8

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Responder Role: How do I record patient consent in PCC EHR?

Your participation in the Responder role of Clinical Document Exchange requires that you record patient consent in PCC EHR.

- Consent status will determine whether or not a patient's Summary of Care document can be retrieved by another organization.
- A patient's Summary of Care document can be retrieved *only* when their consent is marked **Yes**.

Undetermined Yes No

Responder Role: How do I record patient consent in PCC EHR?

PCC EHR

Elaine "Laney" Benes 12 yrs, 11 mos 5/17/06 F

Communication Preferences

Patient's Confidential Communication Preference
No Preference

Immunization Registry Communication Preferences
Share with Registry: Undetermined
Preferred Contact Method for the Immunization Registry: Undetermined

Clinical Document Exchange Consent
Share Clinical Documents: Undetermined

Account Demographics

Home and Billing Account
Alton Benes (Account # 4057)

Address
1029 149th Street
New York, NY 10001

Phone
Home Phone: 718-4350234
Work Phone: 718-233-2333
Cell Phone: 202-838-2342
Emg Phone:

Account Information
Account Flags: Copy

EMG Contact:
EMG Contact:
EMG Phone #:
Alt Last Name:
Mother Employer:
Father Employer:
Pharmacy #:

Recent Financial History
Last Service:
Last Bill Sent:
Last Pers. Pmt:
Last Ins. Pmt:
Hold Bill Until:
Budget Amt:

Personal Contacts
Edit Add Phone Note Add Portal Message Close

PCC EHR

Elaine "Laney" Benes 12 yrs, 11 mos 5/17/06 F

Immunization Registry Communication Preferences

Share with Registry: Undetermined Yes No
Preferred Contact Method for the Immunization Registry: Undetermined

Clinical Document Exchange Consent
Share Clinical Documents: Undetermined Yes No

Account Demographics

Home and Billing Account Reassign Account
Alton Benes (Account # 4057)
First Name: Alton
Last Name: Benes

Address
1029 149th Street
address 2
New York NY 10001

Phone
Home Phone: 718-4350234
Work Phone: 718-233-2333
Cell Phone: 202-838-2342
Emg Phone:

Account Information
Account Flags: Copy Card
EMG Contact:
EMG Phone #:
Alt Last Name:
Mother Employer:
Father Employer:
Pharmacy #:

Recent Financial History
Last Service:
Last Bill Sent:
Last Pers. Pmt:
Last Ins. Pmt:
Hold Bill Until:
Budget Amt: \$

EDITING Add Phone Note Add Portal Message Close Save Save + Exit

Responder Role: Patient Consent at your Practice

When you go-live with Clinical Document Exchange, PCC will set the consent status for all of your existing patients.

Your practice's consent policy for CDE will determine the status of existing patients.

What is your practice's patient consent policy?

Opt-in

Patient data will be shared only if and when a patient has given explicit consent.

Opt-out

Patient data will be shared unless and until a patient explicitly revokes consent.

PCC recommends obtaining legal counsel to determine which consent policy aligns with state laws and requirements.

Clinical Document Exchange: Key Takeaways



CDE is a form of interoperability that provides the means to securely and efficiently provide and retrieve clinical records.



CDE allows your practice to make clinical records available to other organizations without your intervention.



CDE creates connections between your practice and larger health systems, making it easier to share data.



Like DSM, CDE can save the time and resources that may be otherwise spent mailing, faxing, or scanning documents.

DSM & CDE: Complementary Solutions



Direct Secure Messaging

Clinical Document Exchange



Getting Started with DSM & CDE



1. Identify which of your exchange partners use DSM and CDE

-For DSM, reach out to your local hospital, specialists, etc.

-For CDE, use the search tool: <https://carequality.org/active-sites-search/>

2. Contact your Client Advocate and express your interest

3. Complete training and onboarding with a member of the CDX Implementation Team

Visit learn.pcc.com for more information about DSM and CDE.



- Understand how C-CDA documents support the exchange of clinical information
- Explain how Direct Secure Messaging (DSM) and Clinical Document Exchange (CDE)
 - can be used to send and receive clinical records
 - are different yet complementary solutions
- Identify the steps for getting your practice started with DSM and CDE

Thank you!

Questions?