PINSY

CCDA GUIDE 2022



CURES Information

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CURES Information

Information on the CCDA will come from the following areas in PIMSY: *Please note that this also applies for the Provider Portal

ORGANIZATION MANAGEMENT - USER DETAILS - CLIENT DETAILS

E.H.R. SECTION

• Information in the E.H.R. Section will be found here:

Administration > Organization Management > Main Tab.

• If there is a recipient, their information comes from the various contact areas throughout the system.

Main			
Main	Organizations	Division Locations Documents	
100	Save		
	Name	AAA - Behavioral Health - Demo	
	Description	:	
	Cardanal Tau ID #		
	rederal Tax ID #:	26-23456789 Home Page Message:	
	License #:	LIC-123456789	
	NPI #:	123456789	
Lo	cally Assigned #:	LOC-123456789	
	Taxonomy #:	888888888	
	Web Address:		
м	ain Logo Square:	Logo Square Report top Right:	Browse
F	Reports Top Left:	YOUR YOUR	
			\smile

FACILITY INFORMATION SECTION

• Facility information comes from the **default location** of the Center under **Organization Management**.

Name:	AAA Headquarters		Org.:	*** N/A **	*		~	
Description:					User Group:	*** N/A ***	~	4
	V Addresses	Addresses 🖌			Division:	*** N/A ***	~	
Address1:	33 S. Main St	Address2:			Address3:			
City:	Waynesville	State:	NC	~	Zip:	287865555		
Phone:	(800) 828-5465 x	Fax:	<u>(_)</u>		Sched. Color:	Green		~
Supervisor:	*** N/A *** ~	Type:	*** N/A ***	~	Active	Default		
Billing Location	Information							
NPI Numb	ber:	Fed	leral Tax ID #:			Docs		
Taxonomy	#:	Is Individual	(Not Company)		Addition	al Details		
Created Date:	11/30/2022 11:53:00 J	Created By:	Administrator	, System				
Edited Date:	11/20/2022 11-52-00 /	Last Edited Bur	Administrator	Svetem				

AUTHOR, CARE TEAM, AND PROVIDER SECTIONS

- These sections can be found here:
 - 1. Client > Client Management > Select a client > Client Details tab

Client Details Contacts C	heck List / Comments / Requests	Medical	Diagnosis	Treatment Plan	Renewals	Authorizations	Notes	Doc
Save Save Copy	New 🥢 Delete							
Client Billing Dispositions Slow Pay None	Pronouns He / Him Edit							
Basi	c Information							
A d m i	nistration Inform	matio	n					
Date of Admission:	☑ 8/24/2009 □▼ Ci	ient SSN:	111-11-22	22 Active		Suspended ((Notes)	
Primary Therapist:	Peter Brady	~	Q	.P. / Clinician II:	John Snov	v		~
CM / Clinician 3:	Bobby Brady*	~		Clinician 4:	Annie ARC	therapist		~
Physician (internal):	Dr. Greg Brady	~			📥 I	Additional Users		
Default Division:	Outpatient Therapy *** Inactiv	ve ~			📥 Add	litional Divisions		
Default Location Code:	3 School	~			Addi 📥	tional Referrals		
Ref. Source:	Private Physician	~	C	efault Location:	Jackson O	ffice		~
	•		Di	ate of Referral:	12/ 6/2	022 🔲 🔻		

- This includes the contact information on both the **Primary Therapist** and **Primary Physician** (internal) from the **User Details** area of the system.
- This also uses the **phone** and **address** of the **default location** assigned to the provider. Administration > User Management > User Personnel Folder

User Details	User Details	Ref. Renewals	Clients	Documents Co	des / Rates	Payroll	Surveys	s Groups Qa	A	
Save Save	🚮 Сору	Sew (🕜 Delet	e						
	Prefix:	Dr.	~						00:00:03.68	
	FirstName:	Dr. Greg		Middle Name:				Last Name:	Brady	
	Suffix:	N/A	~	Title:	PsyD		~	Date of Birth:	12/ 6/2022	-
	NPI #:	8165786544		Medicaid ID #:				Medicare ID #:		
	SSN:			Credential #	t:			DEA #:	QD1526548	
	Email:			Cell		·		Phone:	87) 987-9879 x898	
		Address	es							
1	Address 1:			Address 2:				Address 3:		
	City:			State:	NC	~		Zip:		
Admin. Inf	0									
Clinicia	n Number:	B-U1018-003		0	Sche	d. Preferen	ices	Sched. Color:	*** N/A ***	~
	Login:	greg		((A) E	inter Passw	vord			
	Active			(Change Pwd.	Next Login			Suspended (N	otes) 🗌
Da	ate of Hire:	1/17/2005		Date of Term	L: 🔽 7/1	7/2010	•		Suspended (L	ogin) 🗌
Secu	rity Profile:	Psych / Doctor	(All Clien	ts)			~		Audit this	User 🗌
S	Supervisor:	Ebony Vazque	z* ∨	Supervisor II:	*** N/A ***		\sim	Supervisor III:	*** N/A ***	~
Defau	It Modifier:	U3	~	Supervision:	*** N/A ***		~ [Default Location:	Group Home Hay	woo ~

1. Information on the **sender** is taken from the logged-in user creating the CCDA document.

CODED FIELDS SECTION

• Information about the Client comes directly from the client's chart, under the **Client Details tab**.

Client Details Cont	acts Check List / Comment	s / Requests Medical	Diagnosis Treatme	ent Plan Renewals Autho	prizations Notes Documents 1
Save Save	🖻 Copy 🛛 😼 🖉 New	Delete			
Client Billing Disposition None None	None Edit				
В	asic Informat	ion			
Prefix:	*** N/A *** ~ ~	Client Number:	N-C-11185	Alt Client Number:	
Date of Birth:	≤ 5/ 1/1970 .	Age:	52	Gender Assigned at Birth:	Female 🗸 🗸
First Name:	Alice	Middle Name:	Jones	Last Name:	Newman
Suffix:	*** N/A *** ~	Alias:		Maiden Name:	
Email:	kdjkdj@gmk.com	Cell:	(555) 777-1234	Phone:	(555) 723-1544 x
(V Addresses	Fax:	<u>()</u>	Work Phone:	<u>()x</u>
Address 1:	1357 Amber Dr	Address 2:		Address 3:	
City:	Beaverton	State:	OR ~	Zip:	97006

Demog	graphics									
Gender Assigned at Birth:	Female	~		Gender Id	lentity:	*** N/A	***		~	
				Sexual Orier	ntation:	Lesbia	n, gay or homos	sexual	v	
Ethnicity:	Not Hispanic or Latino	\sim		Additional Et	hnicity:	*** N/A	***		~	
Ethnic	ity Sub: *** N/A ***		\sim	Ad	d. Ethnicit	ty Sub:	*** N/A ***		_	~
		_		. 150						
Race:	White	~		Additiona	Race:	*** N/A	***		~	
Ra	ace Sub: European		~		Add Rad	te Sub:	*** N/A ***			
Language:	English	~		English Pro	oficient	~				
Living Arrangement:	*** N/A ***	~		Residence	e Type:	*** N/A	***		~	
Adults In Household:	Children In Household:			Marital	Status:	*** N/A	***		~	
Annual Income:				Employment	Status:	*** N/A	***		~	
Disability:	*** N/A ***	~			Target	label th	ree		~	
Smoking Status:	Current Every Day Smoker (1)	~		First Contact	t Date:	12/	6/2022 🔍			
Number of Arre	sts 30 Days Prior to Admission:				Veteran			Pregnant		
School:	*** N/A ***	~			Grade:	*** N/A	***		~	



PROBLEMS AND HEALTH CONCERNS SECTION

• The Problems and Health Concerns section of the CCDA is populated from the **Diagnosis tab** in the client's chart.

Client	Details Cont	tacts Check List / Comments / R	lequests Medical Diagnosis	Treatment Plan	Renewals Au	thorizations	Notes	Documents	Audits 3	Surveys	Status Log	Client Port
2	Save											
	New Diagno	osis 🛛 🕵 View Diagnosis	Educational Resources									
	1 of 9	N N Steport										
	Code	Name	Description		Diagnosis Da	te V	VHODAS	AF	Diagnosis Type		Primary	Status
•	R50.9	Fever			6/21/2015 11:0	00 PM						Active
	T86.11	Chronic rejection of renal transplant			12/30/2011 11	:00 PM						Active
	110	Essential (primary) hypertension			10/5/2011 6:10	MAG						Active
			Watch Weight of patient		10/5/2011 6:01	1 AM		ł	Health Cor	ncern		Active
			Documented HyperTensio	n problem	10/5/2011 6:01	1 AM		ł	Health Cor	ncern		Active
			Documented HypoThyroid	ism problem	10/5/2011 5:59	9 AM		ł	Health Cor	ncern		Active
			Chronic Sickness exhibite	d by patient	10/5/2011 5:58	BAM		ł	Health Cor	ncern		Active
	E03.9	Severe Hypothyroidism			12/31/2006 6:1	16 AM						Active
	E66.3	Overweight			12/30/2006 11	:00 PM						Resolved

• The CCDA utilizes the **Diagnosis Type** to determine what a "Health Concern" and "Health Status" is. Anything with an actual **Diagnosis Code** is considered a "problem" on the CCDA.

ASSESSMENT NOTE - TREATMENT PLANS - CLIENT CHART

FREE TEXT FIELDS SECTION

- Free Text fields on the CCDA are located:
 - Under Client Vitals in the client chart.
 - Select Session Summary information from the drop down.
 - Any free text clinical fields

Jient Vitals Forms Substance Usage Medications Diagnosis Add. Services Goal Addendums Team Reference	Misc Q&A Tracking
Select Misc Vital Signs Info: Session Summary	~
Session Summary	
Clear / New	Charts Date: 12/ 8/2022
Title/Group: N-C-5-11 00:00:00.89	
Assessment	
	A
	<u>v</u>
* Descent Facility	
Reason For Visit	
	A
	-
Session Summary.	
	A
	<u>v</u>
Visit Plan:	
	A
	<u>v</u>

- The system pulls information about Cognitive Status, Functional Status, Future Appts, Session Goals, Reason for Visit, and etc., from this area of the Assessment Note.
- If the Q&A form contains any information, then it is considered "public" and will be sent out on a CCDA file. The client will also be able to see it.
 - WE DO NOT PULL FROM THE STANDARD NOTE FIELDS on the Progress or Assessment notes.
 - WE DO NOT PULL NARRATIVE INFORMATION from any other Q&A forms.



FUTURE SCHEDULED TEST SECTION

• It pulls Future Scheduled Tests from the **Orders tab** of the medications screen in PIMSY when the date is after the session date.

ame: Alice	lewman:		Client #: N-C-5:			Age:	52:			
essment / Medica	I Follow-up Notes Cli	ent Vitals Diagno	sis Medications eMAR Med Containers	Substances	History Order	s Lab Results	Immunizations	Continuity of Care	Procedures / Dev	ices
Miew Assessn	nent Note 🛛 🖉 Ne	w Assessment No	e							
44 1 4 2										
♥ 1 of 2: Page: 1 ≑	CPP: 40 🚖 💽	port								
▲ 1 of 2: Page: 1 ÷ Note #	CPP: 40 🖨 🝋	Performed By	Billing Code	Released	Loc. Code	Released On	Release By	d Released For Review	Face To v Face	D
♥ 1 of 2: Page: 1 ♥ Note # N-C-5-11	CPP. 40 2 2015 Service Date 6/22/2015 7:00 AM	Performed By 1 Davis, Albert	Billing Code (94640)Nebulizer Therapy	Released	Loc. Code 11 - Office	Released On	Release By	d Released For Review	v Face To Face	D 30

CARE PLAN INFORMATION SECTION

• Care Plan information pulls from the **Observation / Need / Problem** section of the **Treatment Plan** in the client's chart.

Save Select the Need below to view the associated Goal or enter in a new Need in the empty line at the bottom of the grid. Need Need Need Need Need Need Need Ne	Client De	alls Contacts Check List / Comments / Requests Medical Diagnosis Treatment Plan Renewals Authorizations Notes Docurr	ents Audits Surveys S	Status Log Cli	ient Portal		
Select the Need below to view the associated Goal or enter in a new Need in the empty line at the bottom of the grid. Need Need Need Need Need Need Need Ne	1	ve					Exit
Need Copy Need Details Treatment Plan Report N < 1 of 5	Select	he Need below to view the associated Goal or enter in a new Need in the empty line at the bottom of	the grid.				
N (1 of 5) N (1 of 5) Need Primary (1 of 5) Need Need Need Service Division Last Edited > Plan to get admitted to Community Health Hospitals Inpatient facility if fever does not subside within a day. (Date: 6/23/2015) Future Visit 6/21/2015 & 8/11/2020 4: After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015. Future Visit 6/21/2015 \$/11/2020 4: Plan for Clindamorin 300me, RNNom odde - 748747. TD if nain does not subside by the end of the day. Medication Order, 6/21/2015 \$/11/2020 4:	Need		У Сору	Need	Details 📜	Treatment P	lan Report 🛛 🧝
Need Need Need Service Date Division Last Edited Date > Plan to get admitted to Community Health Hospitals Inpatient facility if fever does not subside within a day. (Date: 6/23/2015) Future Visit 6/21/2015 % 8/11/2020 4: After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015. Future Visit 6/21/2015 % 8/11/2020 4: Plan for Clindamyrin 300me, RNNrm orde - 748747. TD: if nain does not subside by the end of the day. Medication Order. \$/21/2015 % 8/11/2020 4:	14	1 of 5 🙌 🕅 📝 Export	Treatment Plan	Type: Prim	ary		 V Filter
Plan to get admitted to Community Health Hospitals Inpatient facility if fever does not subside within a day. (Date: 6/23/2015) Future Visit 6/21/2015 9/11/2020 4: After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015. Future Visit 6/21/2015 9/11/2020 4: Plan for Clindamwin 300mo, RxNorm code - 748747. TD: if nail does not subside by the end of the day. Medication Order. 6/21/2015 9/11/2020 4:		Need	Need Type	Need #	Service Date	Division	Last Edited Date
After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015. Future Visit G/21/2015 8/11/2020 4:	•	Plan to get admitted to Community Health Hospitals Inpatient facility if fever does not subside within a day. (Date: 6/23/201	5) Future Visit	~	6/21/2015	~	8/11/2020 4:
Plan for Clindamycin 300mg, BxNorm code - 748747, TID, if nain does not subside by the end of the day. Medication Order \sim 6/21/2015 \sim 8/11/2020 4-		After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015.	Future Visit	~	6/21/2015	~	8/11/2020 4:
		Plan for Clindamycin 300mg , RxNorm code - 748747, TID, if pain does not subside by the end of the day.	Medication Order	~	6/21/2015	~	8/11/2020 4:
Get a Chest X-ray done on 6/23/2015 showing the Lower Respiratory Tract Structure. Future Order 🗹 6/21/2015 🗸 8/11/2020 4:		Get a Chest X-ray done on 6/23/2015 showing the Lower Respiratory Tract Structure.	Future Order	~	6/21/2015	~	8/11/2020 4:



GLOBAL GOALS SECTION

• There is an additional Global Goals section on the CCDA. Information for this section pulls from the standard **Treatment Plan** area in the chart.

• The goals pull from here:

leed					lood in the empty line o		o grid.	😑 Copy N	eed 🔊	Details 🧏	Treatment P	an Report 🔰
	1 of 5	N N Sa Export					Treat	ment Plan T	pe: Prim	ary		~ Q F
	Need						Need Type		Need #	Service Date	Division	Last Edited
•	Plan to g	et admitted to Community	Health Hospita	als Inpatient facility if fever of	loes not subside within a d	ay. (Date: 6/23/2015)	Future Visit	V		6/21/2015	~	8/11/2020 4
	After treat	ment, schedule visit with N	eighborhood f	Physicians Practice on 7/1/	2015.		Future Visit	v		6/21/2015	×	8/11/2020 4
	Plan for C	lindamycin 300mg , RxNo	rm code - 748	747, TID, if pain does not s	ubside by the end of the da	у.	Medication	Order 🗸		6/21/2015	~	8/11/2020 4
	Get a Che	est X-ray done on 6/23/201	5 showing the	Lower Respiratory Tract Si	ructure.		Future Orde	r v		6/21/2015	~	8/11/2020 4
	Get an E	(G done on 6/23/2015.					Future Orde	r v		6/21/2015	~	8/11/2020 4
								~		12/8/2022	~	
ele oal	ct the Go	al in the grid below you	ı wish to vie	w and press the modi	fy button. Or press the	new button.					ew Goal	Modify G
_	Goal #	Goal	Objective	Support/Intervention	Who Will Provide Support	Support Frequency	Active	Last Edit Date	ed	Last Edited B	y	

VITALS SECTION

• For the vitals section on the CCDA, this information pulls from the **Vitals tab** on the **Assessment Note**.

Client Vitals Forms Substance Usage	Medications Diagnosis	Add. Services Goal	Addendums Team	Reference M	sc Q&A Tracking
	Select Misc Vital Si	gns Info: Client Vitals			~
Clear / New					
Title/Group: N-C-5-11					
Pulse Oximetry:					
Inhaled Oxygen Concentration:					
Height - cm:					
Remarks:					
Weight - kg:					
Remarks:					
Rody Maee Inday					

• If there is a question on the Q&A form then it is considered "public" and will be included in the CCDA document, sent to other providers, and viewed by the client.



SOCIAL HISTORY SECTION

• Social History information pulls from the various **Smoking Status** fields in PIMSY.

Client Vitals	Forms	Substance Usage	Medications	Diagnosis	Add. Services	Goal	Addendums	Team	Reference	Misc Q&A Tracking
			Select	Misc Vital Si	igns Info: Sess	ion Su	mmary			~
Session Sur	nmary									
Clea	ar / New									
Title/Group	N-C-	5-11								
00:00:00.70										
Smoki	ng Stat	us (Select Just On	e):							
Heavy	Smoke	er								
Light	Smoker	•								
Curre	nt Every	Day Smoker								
Curre	nt Some	e Day Smoker								
Health	Status	(Select Only One):								
Alive a	and wel	I								
Sever	ely disa	bled								
Chron	ically ill									
Sever	ely ill									

LAB RESULTS SECTION

• The Lab Results section of the CCDA is populated from the imported in Lab Result HL7 files. See the **Lab Results tab** in the client's chart.

S 🔊	ave											a)	Client /	udts 🚡	Client Surveys	🔪 Docs 🔝 Exit
Name	Alice New	nan:		Client #:	N-C-5:		_	Age: 52:								
Assessr	nent / Medical Follow	up Notes Client Vital	s Diagnosis Medi	cations eMAR Me	ed Containers Su	bstances Hist	vry Order Lab	Results mmunizations	Continuity of 0	Care Procedur	res / Devices					
M	1 of 1	N Steport			💘 Fiter	Save	Copy	Mew 🛛 🅢 Delet	e							
	Lab Result #	Description	Received Date	Lab	OrderNumb	Lab Result	LAB-6	Receiv	ed Date: 🔽	8/ 3/2020						Retrieve
	LAB-6	Types: Chemist	8/3/2020 9:21	WDLMilton Str	ORD-00008	Description:	Types: Chem	nistry - WX101680T,		Order	#: ORD-00	× 8000				Share
						Lab Info.:	01 11 1							Remarks:		
						WDLMit	in Street Labor	ratory								
						Lab Result	fo:									
						FILE INF	RMATION ***	******								
						Sending	acility: WDL									1
						Receivin	App: EMR									
						Date Tim	e Create by La	ib: Jun 23 2015 2:19	PM							
						File Vers	on: 231									
						Created	Date: 8/3/2020	9:21:47 AM Cre	ated By: Adm	ninistrator, Sys	stem					
						Last Edited	Date: 9/3/2020	7:44:18 AM Last E	ited By: Adm	ninistrator, Sys	stem					
						841	7 10	Export							See Be	set Lavout 🥝 Filter
						Co	le Type	Test Performed	Results	Units	Range	Date	Status Fla	ig Source	Condition Remar	cs CreatedDat
						▶ 5778-6	Chemistry	Color of Urine	YELLOW			6/22/2015 1:17:00 PM	F N		Yellow	6/22/2015 1:17:00
						5767-9	Chemistry	Appearance of Urine	Clear			6/22/2015 1:17:00 PM	F N		Clear	8/3/2020 9:21:48 A
						5811-5	Chemistry	Specific gravity of Urine by Test strin	1.015		1.005-1.030	6/22/2015 1:17:00 PM	F			8/3/2020 9:21:48 A
						5803-2	Chemistry	pH of Urine by Test strin	5.0	(pH)	5.0-8.0	6/22/2015 1:17:00 PM	F			8/3/2020 9:21:48 #
						5792-7	Chemistry	Glucose (Mass/volume) in	50	mg/dL		6/22/2015 1:17:00 PM	F		Neg	8/3/2020 9:21:48 A
						5797-6	Chemistry	Ketones Mass/Volume1 in	Negative			6/22/2015 1:17:00 PM	F		Negative	8/3/2020 9:21:48 A
						5804-0	Chemistry	Protein[Mass/Volume] in urine by test strin	100	mg/dL		6/22/2015 1:17:00 PM	F		Negative	8/3/2020 9:21:48 #
-				-		•										



PROCEDURES SECTION

- Procedures on the CCDA come from the various procedures performed on the client or devices that have been implanted (these aren't actually applicable to mental health but we have provided an area for it anyway).
 - See the **Procedures / Device tab** in the note.

100	Save												<u>م</u>	Client Audits
Na	ame: Alice N	ewman:			Client #:	N-C-5:		Age	52:					
Ass	essment / Medical	Follow-up Notes	Client Vitals Dia	agnosis Medication	ns eMAR Med (Containers Sub	stances History	Orders Lab Resu	Its Immunizations	Continuity of Ca	re Procedures /	Devices		
Dra	ig a column header	here to group by	that column											
	Device Name	Remarks	Active	Device GUID	Device Info	Status	Edited Date	Created Date	Created By Fu	Edited By Full	Device SNOME	Note Number	Procedure Desc	Procedure
٠								Cli	ck here to add a ne	w row				
+					Oevice Inform	Complete	9/14/2020	9/14/2020	Administrator,	Administrator,			Nebulizer ther	Nebulizer ther
	Cardiac resyn		\checkmark	(01)00643169	Device Inform	Complete	11/2/2020	8/18/2020	Administrator,	Administrator,	406224006			Introduction o

ENCOUNTERS SECTION

For the Encounters section on the CCDA, this information is pulled from the various sessions the provider(s) had with that client. The system pulls header information from all notes done within a certain period of time. All summary and narrative information comes from the Session Summary tab mentioned above. Various information about the sessions come from the main note header information. The CCDA also includes Diagnosis Information and information about the Performed By as they are setup in the user section mentioned above.

Save Save Mew C Delete	ags	Take Payments	Øpen Last Note	Note Report		Docs	View Client	Exit
Release Before: 7/1/2015 7:30:00 AM		Allow Unconditional F	Release			Auto Populated	l Fields	
Alice Newman	Service Date: 6/22/2015	 07:00 AM to 07:3 	0 AM 불 Duration: 0	🗘 hr(s) 30 🌻	mi(s)	Performed By:	Davis, Alber	rt 🗸
Billing Code: (94640)Nebulizer Therapy 100.00ur N/A 🗸 🦻	Location Code: 11 - Office	✓ In Clini	c 🔽			Note #	N-C-5-11	
Released for Review Released	Note Type: Collateral Note	~ Division	n: *** N/A ***	 Face to Face 	ace 🔽	QP:	*** N/A ***	~

LAB ORDERS SECTION

- Lab Orders come from the Lab Orders tab in the client's chart.
- The system only pull orders of the Laboratory Order Type.

1200	ave												Client Audits
Name	Alice Ne	wman:			Client #: N	-C-5:	_	Age: 5	2:				
Assess	ment / Medical Fo	llow-up Note	Client Vitals Diagnosis	8 Medications	eMAR Med Co	ontainers Substar	nces History Orders	Lab Results	Immunizations Conti	nuity of Care	Procedures / Devi	ces	
N	1 of 2	M N 🖥	Export		1								
	Order Type	Order	Status	Frequency	Instructions	Indication	Order Diagnosis Code	Order Date	Preferred Delivery Method	Remarks	Order #	Last Edited Date	Last Edited By
+	Laboratory	 Urinalys 	s Order Pending 🗸	~			~	6/21/2015	~		ORD-00008	7/30/2020 6:40 AM	Administrator, System
	Laboratory	 Urinalys 	s Order Pending 🗸	~			~	6/28/2015	~		ORD-00009	7/30/2020 6:40 AM	Administrator, System
		~	~	~			~	12/8/2022	~				

MEDICATIONS AND MEDICATION ALLERGY SECTION

• Medications and Medication Allergy information on the CCDA comes from the **Medication tab** in the client's chart.

mark D	etails Contac	ts Check List / Comments / R	Requests Medical D	lagnosis Trea	atment Plan	Renewals Authorizations Notes	Documents	Audits Surv	veys Stat	us Log Cl	ient Portal		
2	Save												E 🖉
18	Medical Details	s / Assessment History											
Alle N	gies otes:			Notes:									
ledica	tions List	Show Medication Allergie	es			Can Self M	ledicate					eRX P	rescribe
4	1 of 3	🕅 🕅 💁 Export						🔅 Emar	(2)	Refresh	Education	al Resources	🔾 Filter
4	A 1 of 3 RX Code	Medication	Dosage	Quantity	Refills	Instructions	Pharmacy	Emar Note #	Active	Refresh Route	Education Strength	NDC Code	Unit
•	1 of 3 RX Code 209459	Medication Tylenol Extra Strength	Dosage 1 TABLET EVERY 4 HOURS AS NEEDED	Quantity 40.0	Refills 0	Instructions Instructions: Route: Oral Strength: 500 MG	Pharmacy	Note #	Active	Refresh Route Oral	Strength	NDC Code 00045044406	∦ Filter Unit MG
•	1 of 3 RX Code 209459 309090	Medication Tylenol Extra Strength CefTRIAXone Sodium	Dosage 1 TABLET EVERY 4 HOURS AS NEEDED Inject 1 unit 2 times a day	Quantity 40.0 100.0	Refills 0 0	Instructions Instructions: Route: Oral Strength: 500 MG Instructions: Route: Injection Strength: 100 GM	Pharmacy	Emar Note #	Active	Refresh Route Oral Injection	Education Strength 500 100	NDC Code 00045044406 66288610001	Unit MG MG/M
k 4	1 of 3 RX Code 209459 309090 731241	Medication Tylenol Extra Strength CefTRIAXone Sodium Aranesp (Albumin Free)	Dosage 1 TABLET EVERY 4 HOURS AS NEEDED Inject 1 unit 2 times a day Inject 1 once a week	Quantity 40.0 100.0 8.0	Refills 0 0 10	Instructions Instructions: Route: Oral Strength: 500 MG Instructions: Route: Injection Strength: 100 GGM Instructions: Route: Injection Strength: 100 MGG/0.5ML	Pharmacy	Emar Note #	Active	Refresh Route Oral Injection	Education Strength 500 100 100	NDC Code Code 00045044406 66288610001 55513002501 55513002501	Unit MG MG/M



CLIENT PORTAL

CURES FUNCTIONALITY - PROFILE RULE

- The profile rule "FHIR CCD API Can Access" rule will be added to all centers that have not opted out of the feature. This rule will be automatically added to the client profile.
- Your admin team will need to add this to the appropriate staff profiles to send CCDA files to the FHIR API.

		ane in the profile bo	ix and nit sav	.				
Profile: Client Profile		🗸 🗹 Active		Default 🗌	Emergency Acc	ess 🗌 Power User	r	
		🔽 Client A	Admin. 🗌 I	PT/QP	Doctor			
Desc.: This profile is	used for clients wh	nen they are giver	n access to	the system.				
Unassigned Rules:	FHIR	x 🔍		Assi	gned Rules:	FHIR	х	0
		7		Save FHIR	R CCDA API Ca	n Access		
			Ø D	elete				
			C) Ad	Id All				

OPTED IN FHIR API

• Under the documents section in the Client Portal, there is now a CCD Download tab. From there clients can manually register for FHIR API updates.

Complete Forms
There are forms available.
Forms are provided by your provider for further details about you that need to be completed.
Documents are provided for you to review and possibly add a signature.
📝 View Forms 🗾 View Documents
Upload Documents



Library			_
Forms Document	s Upload	CCD Download	
Common Clinica	l Document		
Date Range:	Start	End	d
	11/22/2022	1	2/22/2022
View Document	Download Vie	wable Document	Download XML CCDA
FHIR API:			
Send My Chart De	tails to FHIR API	Register for FH	HR API Auto Updates
You are registered	for FHIR API Upd	dates	

- Once clients receive the email invite, they will need to go through the registration process.
- The email address listed on the client chart will be the one the invitation is sent to.

Invitation from Your Healthcare Provider
Hello Alice
You have received an invite from your healthcare provider to access your health data in the MeldRx [™] Patient App.
MeldRx Patient App stores all your health data in a secure Data Vault and allows you to receive and share it securely with your providers to coordinate continuity of care. You own and control all the data in this app.
Accept the invitation to setup your account.
ACCEPT INVITE

• If your center has opted out of this feature, the CCD Download tab will not show.



PROVIDER PORTAL

SENDING A CCDA TO THE FHIR API VIA CLIENT CHART

- There are a couple of way providers can generate CCDA's to send to the FHIR server:
 - 1. Under the **Admin tab** in client's chart, providers can now generate CCDA's and send them to the FHIR API as well. This only shows for centers that have opted in. Pick a date range to send a one-time CCDA to the FHIR API.

OR

2. Send a CCDA to the FHIR API and auto-register the client. Every time a note is released, it will automatically be sent to the API.

Primary Referral Source	¥/A**	Date of Referral Q.P. / Clinician II	11/30/2022 **N/A**
Additional Referrals Primary Therapist Free	eud, Sigmond	Q.P. / Clinician II	**N/A**
Primary Therapist Fre	eud, Sigmond		
		✓ Clinician Ⅳ	**N/A**
CM / Clinician III **	√A**	✓ Default Division	Haywood Division
Physician Da	vis, Albert	✓ Additional Divisions	× Brady Division × Jackson Division
Default Location Code **	V/A**	✓ Default Location	AAA Headquarters
Messaging Consent Given by Client		Use Client Detail Info.	
Preferred Contact Method **	N/A**	✓ Messaging Con	tact
ommon Clinical Document			
Date Range Filter Star	t End month/day/year		
Register With FHIR API Set	nd to FHIR API Once OR Send to FHIR API with A DA Send to FHIR API completed. A Client Email for an In dRx™ Patient App has been sent.	uto Updates vitation to access their health data in the	
View Document	▲ Download Viewable Document B Downlo	ad XML CCDA 🛛 🖼 Email Document	

• Providers can only send messages through direct, secure emails. Sending a message via the Provider Portal will only be sent to a direct email protocol.



BB Dashboard	Reports 🗎 Calendar 🏭 Note List 🗟 Tasks 🐸 🖾 Reports	🛱 Alerts	
Pimsy Client			
All Active Clients O Today's	Email Documents X		8 Dashboard
iewman, Alice 05/01/1970	Send Using Secure Email uses the "Direct" email protocol when sending emails to direct email addresses.		
Client Details Demo / QnA In:		Treatment Plan	Notes Document
Slient Portal	Subject:		
Date of Admission	Message:	Client SSN	
Active		Suspended	
Primary Referral Source		Date of Referral	11/30/2022
Additional Referrals	X Cancel Send Using Secure Email	Q.P. / Clinician II	**N/A**
Primary Therapist	Freud, Sigmond	Clinician IV	**N/A**
CM / Clinician III	**N/A** ~	Default Division	Haywood Division

• Providers can view and/or download the CCDA document by selecting the options highlighted in the image below:

CM / Clinician III	**N/A** Default Division Haywood Division
Physician	Davis, Albert ~ Additional Divisions × Brady Division × Jackson Division
Default Location Code	**N/A** ~ Default Location AAA Headquarters
Messaging Consent Given by Client	Use Client Detail Info.
Preferred Contact Method	**N/A** ~ Messaging Contact
Common Clinical Document	
Date Range Filter	Start End month/day/year month/day/year
Register With FHIR API	Send to FHIR API Once OR Send to FHIR API with Auto Updates The Client is registered for FHIR API Updates.
View Docum	nent 🗋 🛨 Download Viewable Document 🗋 📾 Download XML CCDA 🗋 🖾 Email Document 🗍

NOTES

- Under the **reference tab** in a note, providers have the option to send that note to the FHIR API.
- This will be disabled if the note is released.



Chief Complaint Plan			
Forms Substance Usage Medi	cations Diagnosis Goal Add Services Addendums	Reference	Team Misc. Q & A Tracking
Service location	**N/A**	~	Service location If School
Service location If "Other"			
Location Name	1357 Amber Dr		Address
City	Beaverton		State
Zip	97006		
Common Clinical Document			
Register With FHIR API	Send to FHIR API CCDA Send to FHIR API completed.		

• Here is the location in the Desktop application:

🝘 Note: John Adams, 41, 04/11/1981	X										
🔯 Save 🦙 Copy 📝 New 💋 🖉 Tags	🥦 Take Payments 🛛 🖉 Open Last Note 🕽 🥦 Note Report 🛛 🥦 🔪 Docs 🛛 🐏 View Client 🛛 💒 Exit										
Release Before: 12/30/2022 12:25:11 PM Allow Unconditional Release Auto Populated Relds											
John Adams	Service Date: 05/10/2022 V 07:00 AM 🕏 to 08:00 AM 🕏 Duration: 1 💠 hr(s) 0 🗢 Performed By: Administrator, Syste V										
Billing Code: (H2012)Day Treatment 1.00ur N/A-1405 🗸 [Location Code: (02) - Telehealth v In Clinic Loc. Type: School V Note #: CERT9-2229-14343										
Released for Review Reviewed Released	□ Note Type: SOAP ∨ Division: FGH ∨ Face to I QP: *** N/A *** ∨										
Reason for Visit History of Present Illness Assessment Plan	Inpatient Collateral Note										
Subjective:	Admitted: 12/28/2022 12:00 A 🗸										
Objective:	Discharged: 2/28/2022 12:00 A V										
Assessment	Note Font Size: V										
Plan	Answers KU Tracking										
Jerian.	Medical Details / Assessment History										
Client Vitals Forms Substance Usage Medications Diagnosis Ad	d. Services Goal Addendums Team Reference Misc Q&A Tracking										
	Sector Leaster Lfo										
Client DOB: 04/11/1981 07:00:00 PM Insurance:	Cenpatico V Service Location Into.										
Client Age: 41 Ins. #:	999999999 Parker House Recovery V Send Note to FHIR API										
Modifiers: User:	Loc.: U7 Col.:										



ASSESSMENT NOTE Q&A

• We have created a new Q&A category called Session Summary, which can be found under the **Client Vitals tab** on the Desktop application.

Client Vitals	Forms	Substance Usage	Medications	Diagnosis	Add. Se	ervices	Goal	Addendums	Tean	n Re	ference	Misc Q&A Trac	cking
Select Misc Vtal Signs Info: Client Vitals Client Vitals Session Summary Date: 12/28/2022 T Modfy Title/Group: CERT9-2229-14343													
Age:									I		Questic	on Answer	Rema rks
Remar	rks:									ľ	Body M. Provided Counse.	28 1 Yes	
											Provideo Counse.	l No	
											Age	40	
											Height	70.00	
Height	- in:										Weight	. 195	

- We have created a new Assessment Note Q&A that houses information from the session note which will go into the CCDA.
- This Q&A contains all the narrative fields that can potentially be pulled into the CCDA.

Forms	Substance Usa	age Medications	Diagnosis	Goal	Add Services	Addendums	Reference	Team	Misc. Q & A Tracking			
					Assessmen	t Forms	Session Summary					
★ New												
Edit	Delete	Question			Anower		т	itle	Demorko			
Eult	Delete	Question			Answer			lue	Remarks			
× Edit	T Delete	Please note Information on this form could potientially be view by the client on the client portal and or in CCDA documents generated for Continuity of Care purposes.										
🕑 Edi	t 🛍 Delete	Visit Plan			Client			N-C-11185-10497				
🕼 Edi	t 🗊 Delete	Assessment			Client			N-C-11185-10497				
🕼 Edi	t 🗊 Delete	Reason For Visit			Client			N-C-11185-10497				
🕼 Edi	t 🛍 Delete	Session Summary			Client		N	-C-11185-	10497			

• Specific Client Vitals Questions are included on the CCDA when they have been filled out, just like in the Desktop application.



- These questions appear on the session summary tab or on the vitals form (these fields also show in Desktop application):
 - 1. Assessment
 - 2. Reason for visit
 - 3. Referrals
 - 4. Cognitive Status
 - 5. Functional Status

PLATINUM PLAN

- If you are on the PIMSY Platinum Plan, we have added a button to the CCDA area that allows you to register the client and send CCDA's from there.
- You must be on an existing CCDA for this to work. From an existing CCDA you can register the client and send the CCDA to the FHIR API.

tainers Substa	nces History Orders Lab Results Immunizations Continuity of Care Procedures / Devices		
Save Save	🎲 Copy 🚽 New 🥢 Delete		
CC #:	CC-134		Retrieve
Description:	test	~~	Generate
Received Bu:			Reconcile
neceived by.		6	Download
Remarks:		٠.	Print
			Share
			CCDA Info
			Send to FHIR API
			*0





ONCE THE FHIR API HAS BEEN QUEUED

- Once the client has been opted into sending session notes to the FHIR API automatically or when a single session note has been queued to be sent to the FHIR API, background processes will do the remainder of the work.
- As notes are released background processes monitor the queuing of these notes and will send them to the FHIR API within 24 hours

Form	ns	Substance Usag	Je Medications	Diagnosis	Goal	Add Services	Addendums	Reference	Team	Misc. Q & A Tracki	ing
Mis	ic Not	te Tracking Fie	lds								
+	New	Print Report								Active C	only
Ed	it	Delete	Question			Answer			Ti	itle	Remarks
G	🕈 Edit	🗊 Delete	Date CCDA Create	ed and sent to	CURES AF	12/28/20	22		?-	C-2382-15742	
U											

• Once the client has been queued for the first time and the first CCDA has been sent, they will receive an invitation to register (see page 13).