



CCDA GUIDE 2022

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# CURES Information

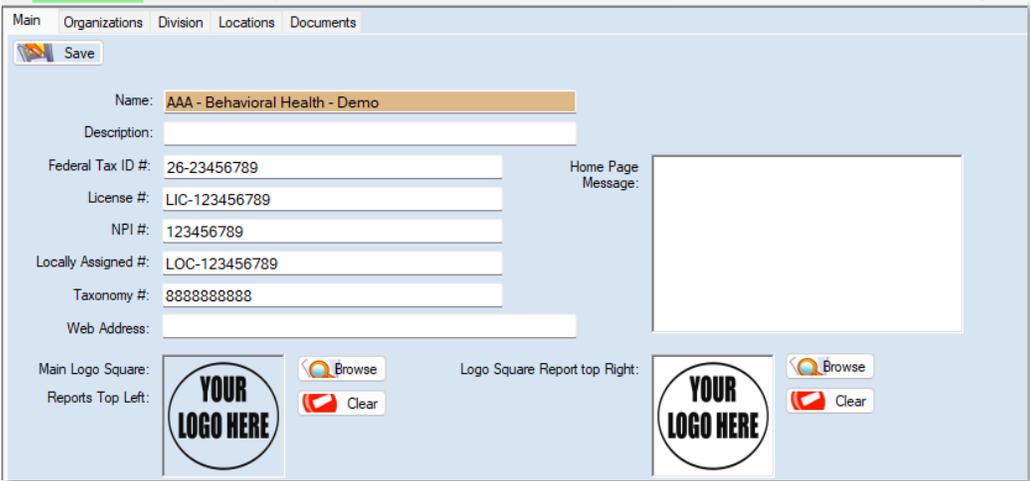
Information on the CCDA will come from the following areas in PIMSY:

\*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 Organizations Division Locations Documents

Save

Name: AAA - Behavioral Health - Demo

Description:

Federal Tax ID #: 26-23456789

License #: LIC-123456789

NPI #: 123456789

Locally Assigned #: LOC-123456789

Taxonomy #: 8888888888

Web Address:

Home Page Message:

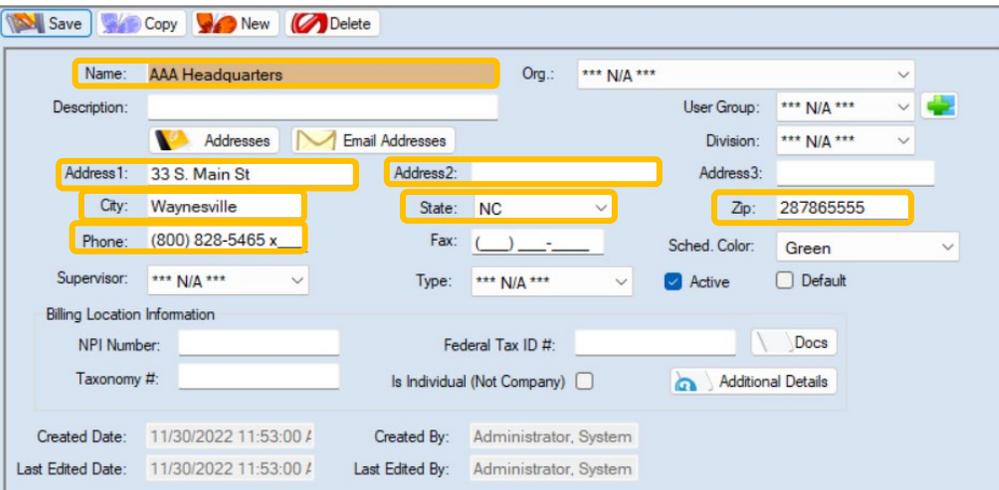
Main Logo Square:  Browse Clear

Reports Top Left:

Logo Square Report top Right:  Browse Clear

### FACILITY INFORMATION SECTION

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



Save Copy New Delete

Name: AAA Headquarters Org.: \*\*\* N/A \*\*\*

Description:

Addresses Email Addresses

Address1: 33 S. Main St Address2: Address3:

City: Waynesville State: NC Zip: 287865555

Phone: (800) 828-5465 x Fax: Sched. Color: Green

Supervisor: \*\*\* N/A \*\*\* Type: \*\*\* N/A \*\*\*  Active  Default

Billing Location Information

NPI Number: Federal Tax ID #: Docs

Taxonomy #: Is Individual (Not Company)  Additional Details

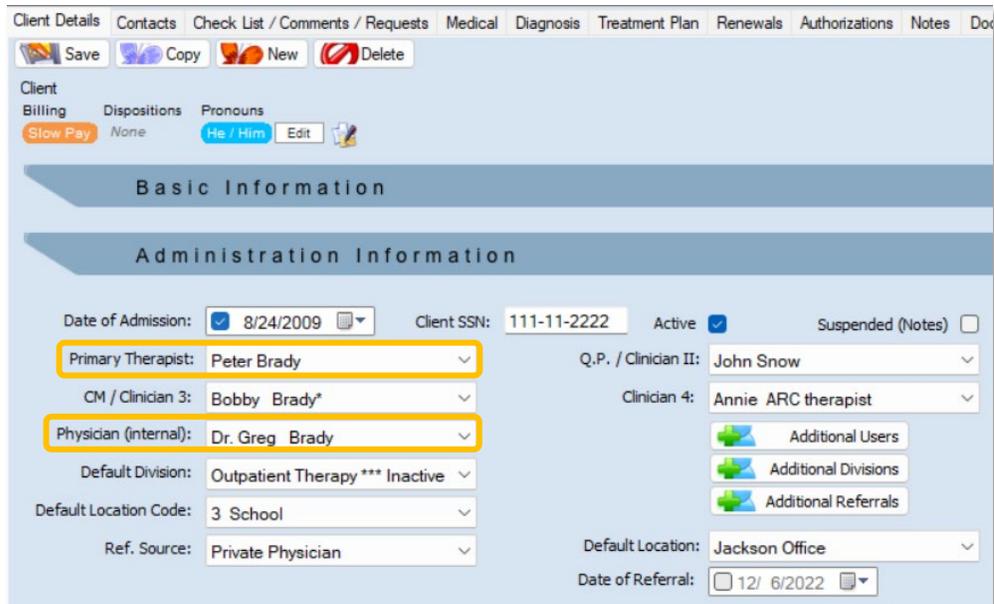
Created Date: 11/30/2022 11:53:00 / Created By: Administrator, System

Last Edited Date: 11/30/2022 11:53:00 / Last Edited By: Administrator, System

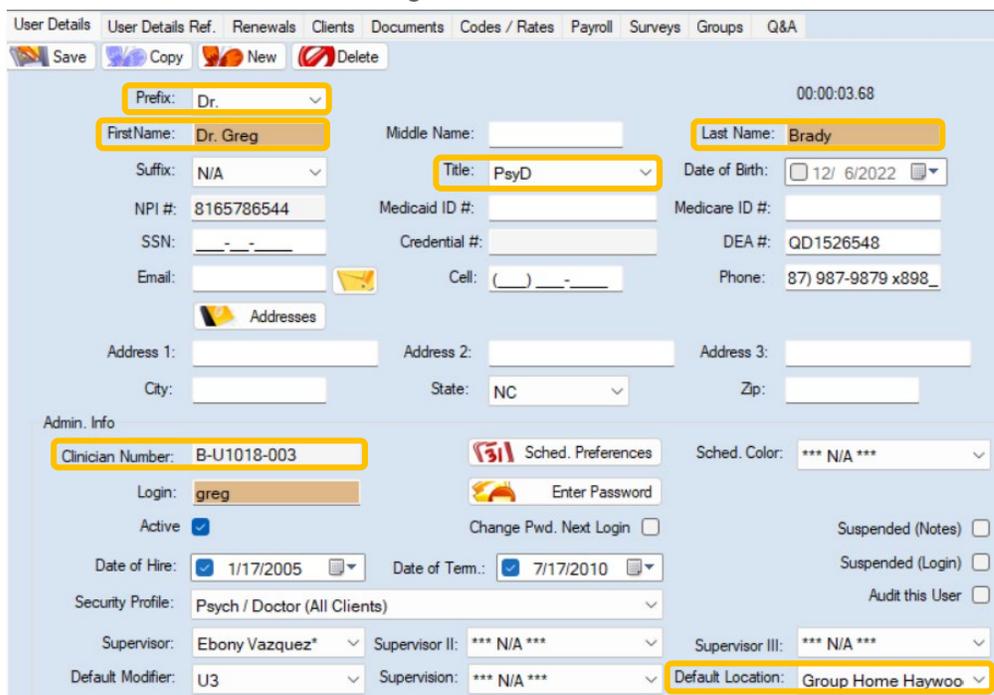
## AUTHOR, CARE TEAM, AND PROVIDER SECTIONS

- These sections can be found here:

1. *Client > Client Management > Select a client > Client Details tab*



- 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*



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 | Contacts | Check List / Comments / Requests | Medical | Diagnosis | Treatment Plan | Renewals | Authorizations | Notes | Documents

Save | Copy | New | Delete

Client  
Billing: None | Dispositions: None | Pronouns: None | Edit

### Basic Information

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

Addresses

Address 1: 1357 Amber Dr | Address 2:  | Address 3:

City: Beaverton | State: OR | Zip: 97006

### Demographics

Gender Assigned at Birth: Female | Gender Identity: \*\*\* N/A \*\*\*

Sexual Orientation: Lesbian, gay or homosexual

Ethnicity: Not Hispanic or Latino | Additional Ethnicity: \*\*\* N/A \*\*\*

Ethnicity Sub: \*\*\* N/A \*\*\* | Add. Ethnicity Sub: \*\*\* N/A \*\*\*

Race: White | Additional Race: \*\*\* N/A \*\*\*

Race Sub: European | Add Race Sub: \*\*\* N/A \*\*\*

Language: English | English Proficient:

Living Arrangement: \*\*\* N/A \*\*\* | Residence Type: \*\*\* N/A \*\*\*

Adults In Household:  | Children In Household:  | Marital Status: \*\*\* N/A \*\*\*

Annual Income:  | Employment Status: \*\*\* N/A \*\*\*

Disability: \*\*\* N/A \*\*\* | Target: label three

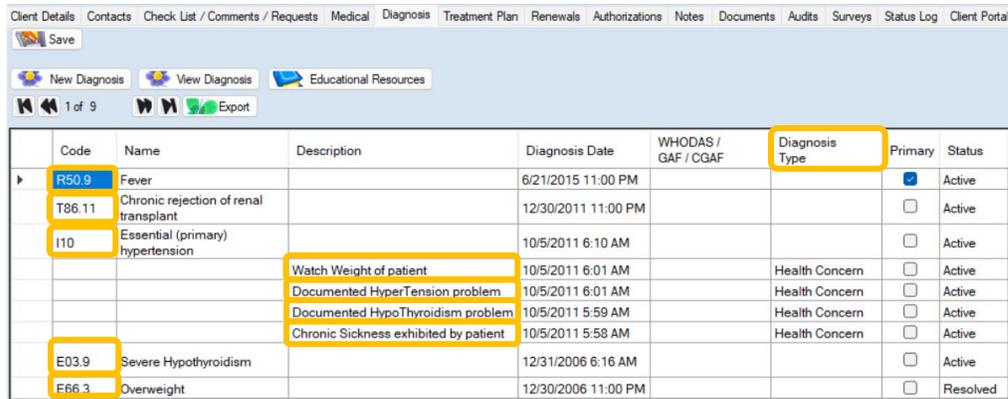
Smoking Status: Current Every Day Smoker (1) | First Contact Date: 12/ 6/2022

Number of Arrests 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.



Code	Name	Description	Diagnosis Date	WHODAS / GAF / CGAF	Diagnosis Type	Primary	Status
R50.9	Fever		6/21/2015 11:00 PM			<input checked="" type="checkbox"/>	Active
T86.11	Chronic rejection of renal transplant		12/30/2011 11:00 PM			<input type="checkbox"/>	Active
I10	Essential (primary) hypertension		10/5/2011 6:10 AM			<input type="checkbox"/>	Active
		Watch Weight of patient	10/5/2011 6:01 AM		Health Concern	<input type="checkbox"/>	Active
		Documented HyperTension problem	10/5/2011 6:01 AM		Health Concern	<input type="checkbox"/>	Active
		Documented HypoThyroidism problem	10/5/2011 5:59 AM		Health Concern	<input type="checkbox"/>	Active
		Chronic Sickness exhibited by patient	10/5/2011 5:58 AM		Health Concern	<input type="checkbox"/>	Active
E03.9	Severe Hypothyroidism		12/31/2006 6:16 AM			<input type="checkbox"/>	Active
E66.3	Overweight		12/30/2006 11:00 PM			<input type="checkbox"/>	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

The screenshot displays the 'Client Vitals' section of the PIMSY interface. The 'Client Vitals' tab is highlighted in the top navigation bar. Below it, a dropdown menu for 'Select Misc Vital Signs Info:' is set to 'Session Summary'. The main form area is titled 'Session Summary' and contains several text input fields with vertical scrollbars:

- Assessment:** A large text area for entering assessment details.
- \* Reason For Visit:** A text area for the reason for the visit.
- Session Summary:** A text area for the session summary.
- Visit Plan:** A text area for the visit plan.

Other visible elements include a 'Clear / New' button, a 'Charts' icon, and a date field showing '12/ 8/2022'.

- 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.

Save

Name: **Alice Newman:** Client #: **N-C-5:** Age: **52:**

Assessment / Medical Follow-up Notes Client Vitals Diagnosis Medications eMAR Med Containers Substances History **Orders** Lab Results Immunizations Continuity of Care Procedures / Devices

View Assessment Note New Assessment Note

1 of 2: Export

Page: 1 CPP: 40

Note #	Service Date	Performed By	Billing Code	Released	Loc. Code	Released On	Released By	Released For Review	Face To Face	Du
N-C-5-11	6/22/2015 7:00 AM	Davis, Albert	(94640)Nebulizer Therapy	<input type="checkbox"/>	11 - Office			<input type="checkbox"/>	<input checked="" type="checkbox"/>	30
N-C-5-12	10/5/2011 7:00 AM	Davis, Albert	(93296)cardiac pacemaker system	<input type="checkbox"/>	11 - Office			<input type="checkbox"/>	<input checked="" type="checkbox"/>	30

## CARE PLAN INFORMATION SECTION

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

Client Details Contacts Check List / Comments / Requests Medical Diagnosis **Treatment Plan** Renewals Authorizations Notes Documents Audits Surveys Status Log Client Portal

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

1 of 5: Export

Treatment Plan Type: Primary Filter

Need	Need Type	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 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:

## 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:

The screenshot shows the 'Treatment Plan' tab in the PIMSY system. It displays a table of needs and a separate table of goals.

Need	Need Type	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 4:5
After treatment, schedule visit with Neighborhood Physicians Practice on 7/1/2015.	Future Visit		6/21/2015		8/11/2020 4:5
Plan for Clindamycin 300mg , RxCNorm code - 748747, TID, if pain does not subside by the end of the day.	Medication Order		6/21/2015		8/11/2020 4:5
Get a Chest X-ray done on 6/23/2015 showing the Lower Respiratory Tract Structure.	Future Order		6/21/2015		8/11/2020 4:5
Get an EKG done on 6/23/2015.	Future Order		6/21/2015		8/11/2020 4:5
			12/8/2022		

Goal #	Goal	Objective	Support/Intervention	Who Will Provide Support	Support Frequency	Active	Last Edited Date	Last Edited By
1	Get rid of intermittent fever that is occurring every few weeks.					<input checked="" type="checkbox"/>	8/11/2020 5:07 PM	Administrator, System

## VITALS SECTION

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

The screenshot shows the 'Client Vitals' form in the PIMSY system. The form includes fields for various vital signs and a remarks section.

Select Misc Vital Signs Info: Client Vitals

Clear / New

Title/Group: N-C-5-11

30:00:00.00

Pulse Oximetry:

Inhaled Oxygen Concentration:

Height - cm:

Remarks:

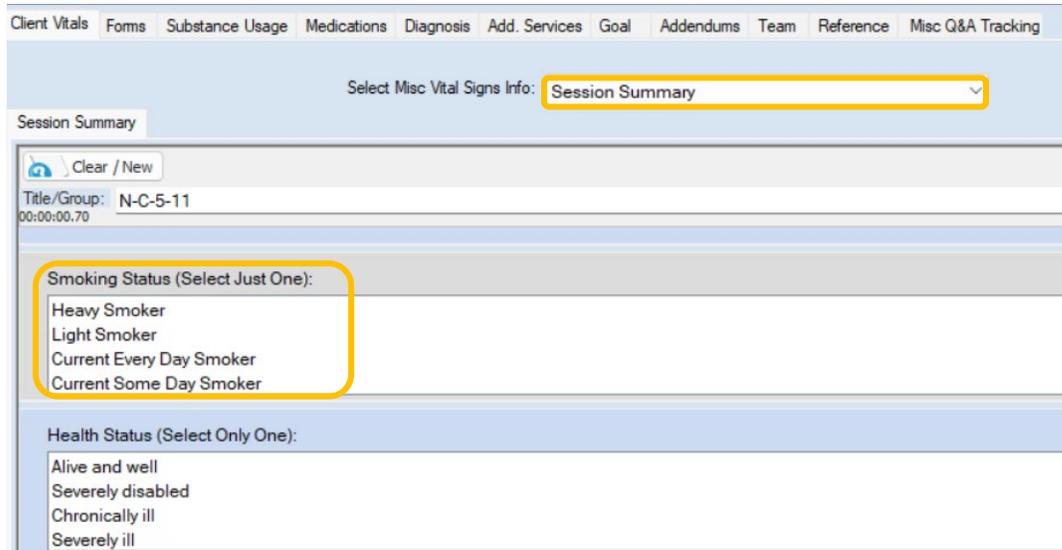
Weight - kg:

Remarks:

- 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 Signs Info: **Session Summary**

Session Summary

Clear / New

Title/Group: N-C-5-11  
00:00:00.70

**Smoking Status (Select Just One):**

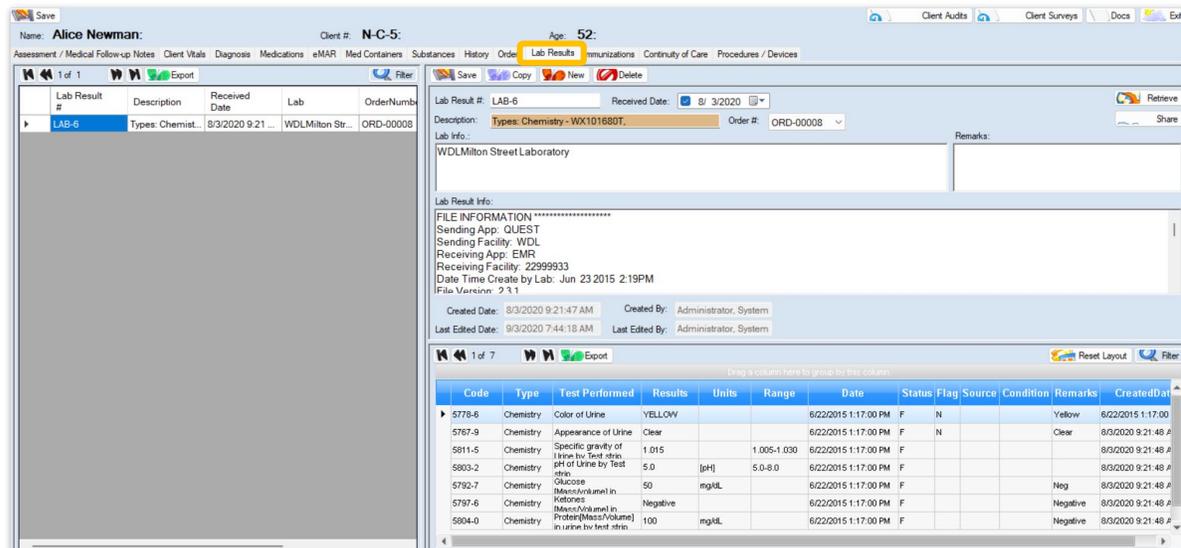
- Heavy Smoker
- Light Smoker
- Current Every Day Smoker
- Current Some Day Smoker

**Health Status (Select Only One):**

- Alive and well
- Severely disabled
- Chronically ill
- Severely 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.



Name: **Alice Newman** | Client #: **N-C-5** | Age: **52**

Assessment / Medical Follow-up Notes | Client Vitals | Diagnosis | Medications | eMAR | Med Containers | Substances | History | **Lab Results** | Immunizations | Continuity of Care | Procedures / Devices

Lab Result #	Description	Received Date	Lab	OrderNumber
LAB-6	Types: Chemiat...	8/3/2020 9:21...	WDLMilton Str...	ORD-00008

Lab Result # LAB-6 | Received Date: 8/3/2020

Description: Types: Chemistry -WX101680T. | Order #: ORD-00008

Lab Info: WDLMilton Street Laboratory

Lab Result Info:

FILE INFORMATION \*\*\*\*\*  
 Sending App: QUEST  
 Sending Facility: WDL  
 Receiving App: EMR  
 Receiving Facility: 2299933  
 Date Time Create by Lab: Jun 23 2015 2:19PM  
 File Version: 2.1.1

Created Date: 8/3/2020 9:21:47 AM | Created By: Administrator, System  
 Last Edited Date: 8/3/2020 7:44:18 AM | Last Edited By: Administrator, System

Code	Type	Test Performed	Results	Units	Range	Date	Status	Flag	Source	Condition	Remarks	CreatedDate
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
5811-5	Chemistry	Specific gravity of Urine by Test strip	1.015		1.005-1.030	6/22/2015 1:17:00 PM	F					8/3/2020 9:21:48
5803-2	Chemistry	pH of Urine by Test strip	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	50	mg/dL		6/22/2015 1:17:00 PM	F				Neg	8/3/2020 9:21:48
5797-6	Chemistry	Microalbumin in Urines	Negative			6/22/2015 1:17:00 PM	F				Negative	8/3/2020 9:21:48
5804-0	Chemistry	Microalbumin in Urines	Negative			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.

## 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.

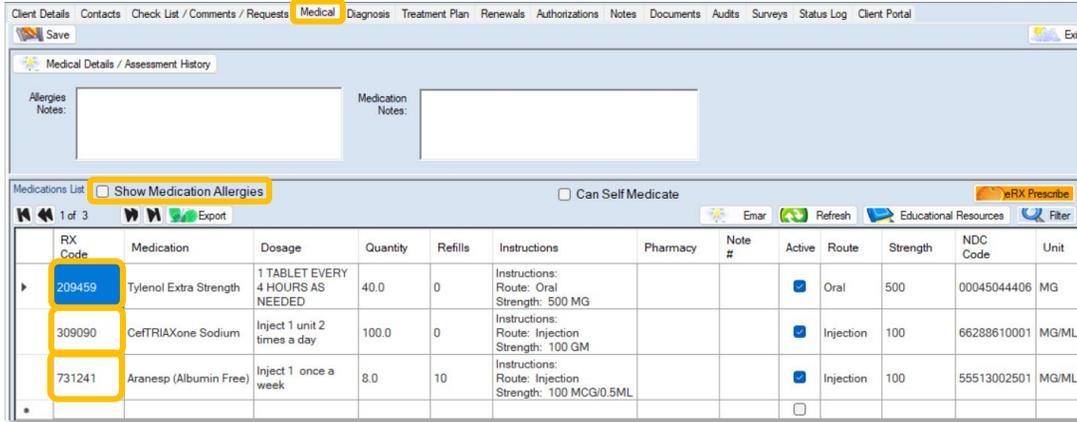
## LAB ORDERS SECTION

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

Order Type	Order	Status	Frequency	Instructions	Indication	Order Diagnosis Code	Order Date	Preferred Delivery Method	Remarks	Order #	Last Edited Date	Last Edited By
Laboratory	Urinalysis	Order Pending					6/21/2015			ORD-00008	7/30/2020 6:40 AM	Administrator, System
Laboratory	Urinalysis	Order Pending					6/28/2015			ORD-00009	7/30/2020 6:40 AM	Administrator, System

## MEDICATIONS AND MEDICATION ALLERGY SECTION

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



Client Details    Contacts    Check List / Comments / Requests    **Medical**    Diagnosis    Treatment Plan    Renewals    Authorizations    Notes    Documents    Audits    Surveys    Status Log    Client Portal

Save    Ext

Medical Details / Assessment History

Allergies Notes:     Medication Notes:

Medications List     Show Medication Allergies     Can Self Medicate    eRX Prescribe

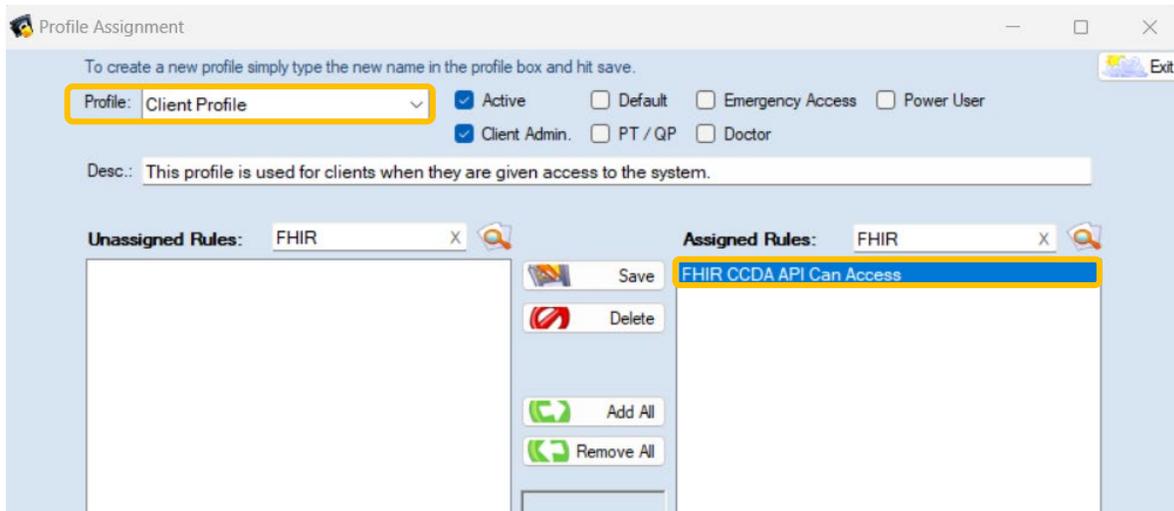
1 of 3    Export    Email    Refresh    Educational Resources    Filter

RX Code	Medication	Dosage	Quantity	Refills	Instructions	Pharmacy	Note #	Active	Route	Strength	NDC Code	Unit
209459	Tylenol Extra Strength	1 TABLET EVERY 4 HOURS AS NEEDED	40.0	0	Instructions: Route: Oral Strength: 500 MG			<input checked="" type="checkbox"/>	Oral	500	00045044406	MG
309090	CeFTRIAXone Sodium	Inject 1 unit 2 times a day	100.0	0	Instructions: Route: Injection Strength: 100 GM			<input checked="" type="checkbox"/>	Injection	100	66288610001	MG/ML
731241	Aranesp (Albumin Free)	Inject 1 once a week	8.0	10	Instructions: Route: Injection Strength: 100 MCG/0.5ML			<input checked="" type="checkbox"/>	Injection	100	55513002501	MG/ML

## CLIENT PORTAL

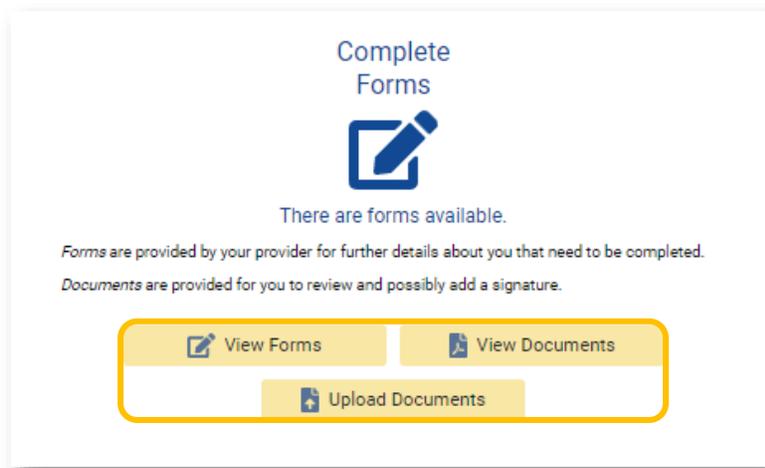
### CURES FUNCTIONALITY – PROFILE RULE

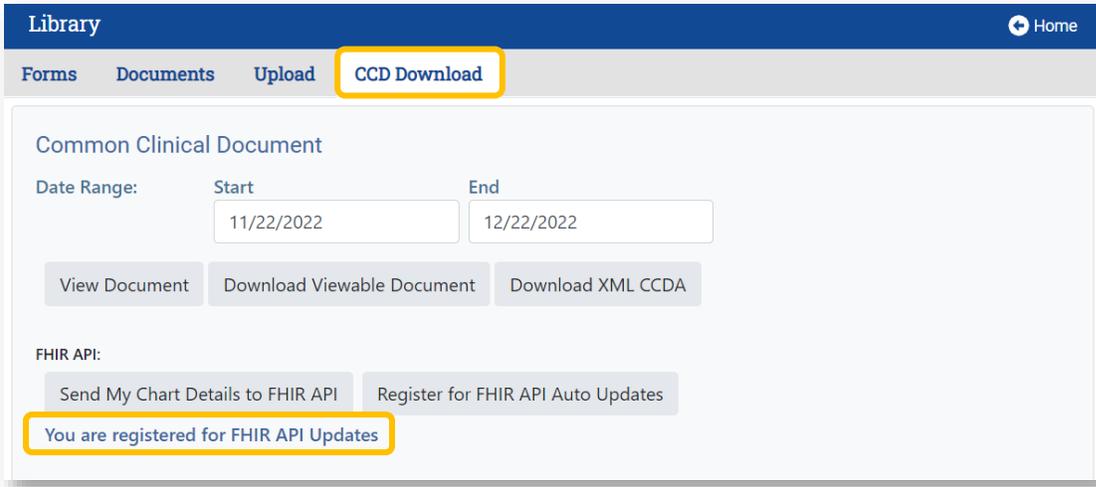
- The profile rule “FHIR CCD API Can Access” rule will be added to all centers that have not opted out of the feature. This rule will be automatically added to the client profile.
- Your admin team will need to add this to the appropriate staff profiles to send CCDA files to the FHIR API.



### 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.





Library Home

Forms Documents Upload **CCD Download**

Common Clinical Document

Date Range: Start  End

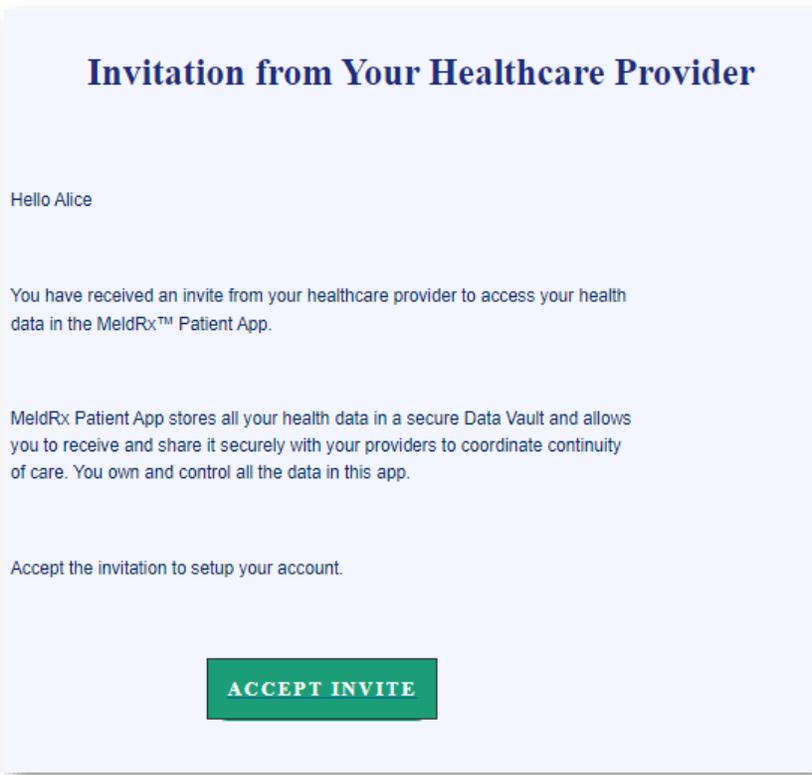
[View Document](#) [Download Viewable Document](#) [Download XML CCDA](#)

FHIR API:

[Send My Chart Details to FHIR API](#) [Register for FHIR API Auto Updates](#)

**You are registered for FHIR API Updates**

- 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.

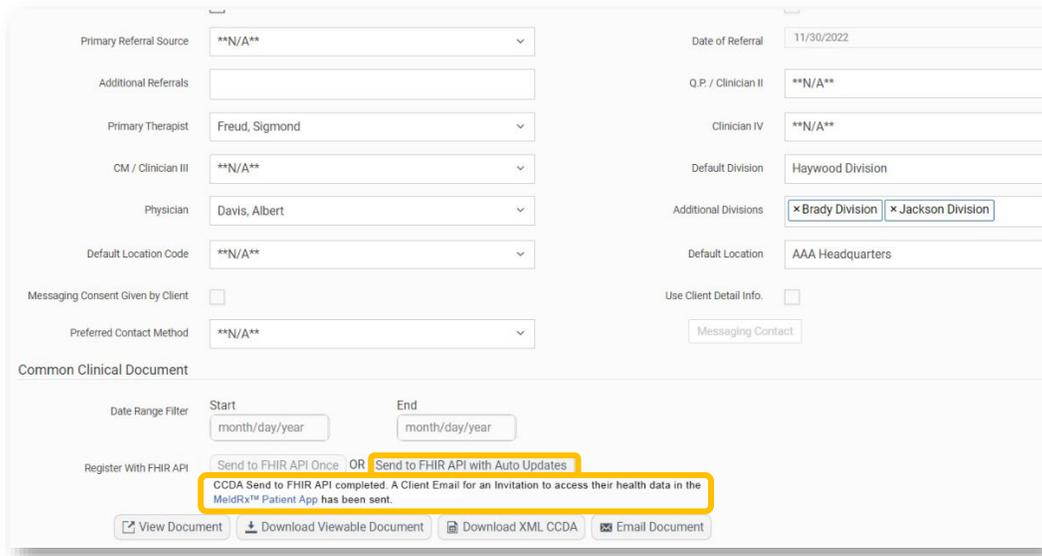
## PROVIDER PORTAL

### 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.

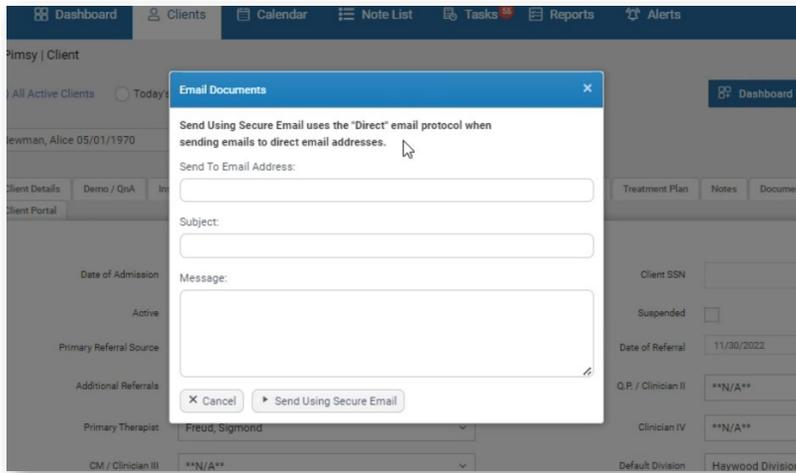
OR

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.

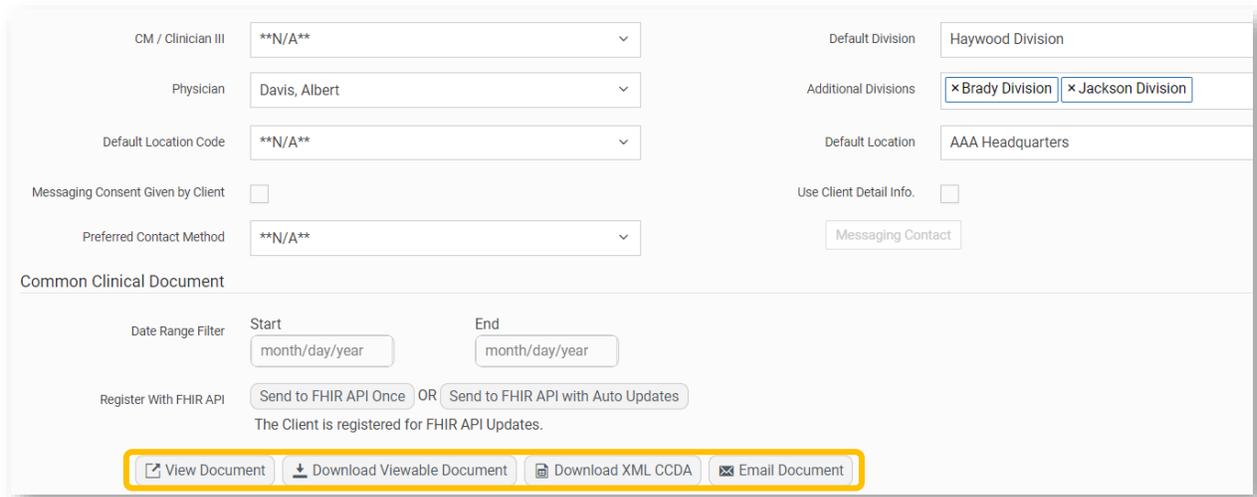


The screenshot displays a web form for generating a Common Clinical Document (CCDA). The form includes various fields for patient and provider information, such as 'Primary Referral Source', 'Primary Therapist', and 'Date of Referral'. In the 'Common Clinical Document' section, there are 'Date Range Filter' fields for 'Start' and 'End'. Below these, the 'Register With FHIR API' section is highlighted with a yellow box. It contains two radio button options: 'Send to FHIR API Once' and 'Send to FHIR API with Auto Updates', with the latter being selected. A message box below the selection reads: 'CCDA Send to FHIR API completed. A Client Email for an Invitation to access their health data in the MeldRx™ Patient App has been sent.' At the bottom of the form, there are buttons for 'View Document', 'Download Viewable Document', 'Download XML CCDA', and '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.



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



## 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 Medications Diagnosis Goal Add Services Addendums **Reference** Team Misc. Q & A Tracking

Service location:  Service location If School:

Service location If "Other"

Location Name:  Address:

City:  State:

Zip:

Common Clinical Document

Register With FHIR API    
CCDA Send to FHIR API completed.

- Here is the location in the Desktop application:

Note: John Adams, 41, 04/11/1981

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 Fields

John Adams Service Date: 05/10/2022 07:00 AM to 08:00 AM Duration: 1 hr(s) Performed By: Administrator, Syst

Billing Code: (H2012)Day Treatment 1.00ur N/A-1405 Location Code: (02) - Telehealth In Clinic  Loc. Type: School 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

Subjective:

Objective:

Assessment:

Plan:

Inpatient  Collateral Note

Admitted:  12/28/2022 12:00 A

Discharged:  12/28/2022 12:00 A

Note Font Size:

Answers MU Tracking Medical Details / Assessment History

Client Vitals Forms Substance Usage Medications Diagnosis Add Services Goal Addendums Team Reference Misc Q&A Tracking

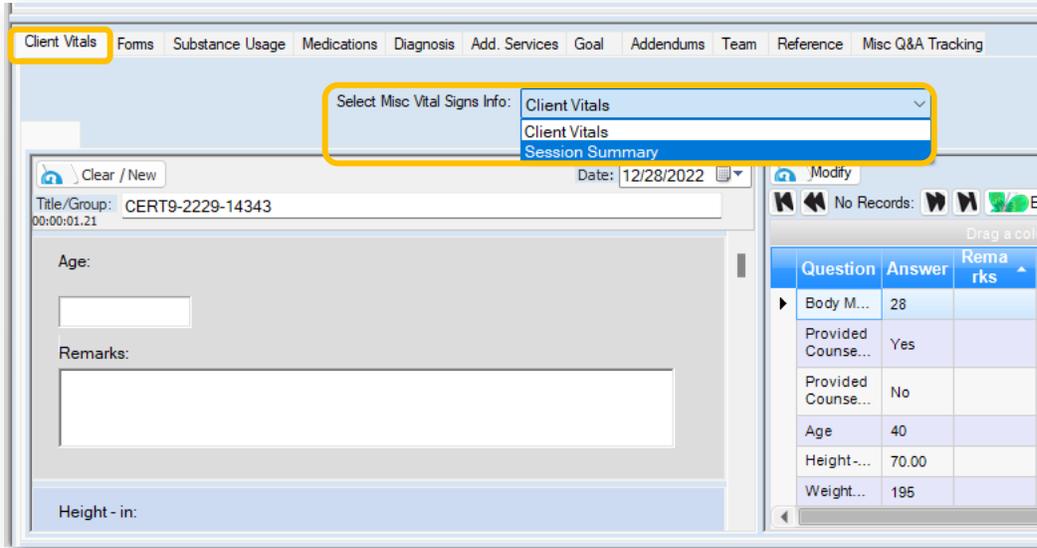
Client DOB: 04/11/1981 07:00:00 PM Insurance: Cenpatico Service Location Info.

Client Age: 41 Ins #: 999999999 Service Location: Parker House Recovery

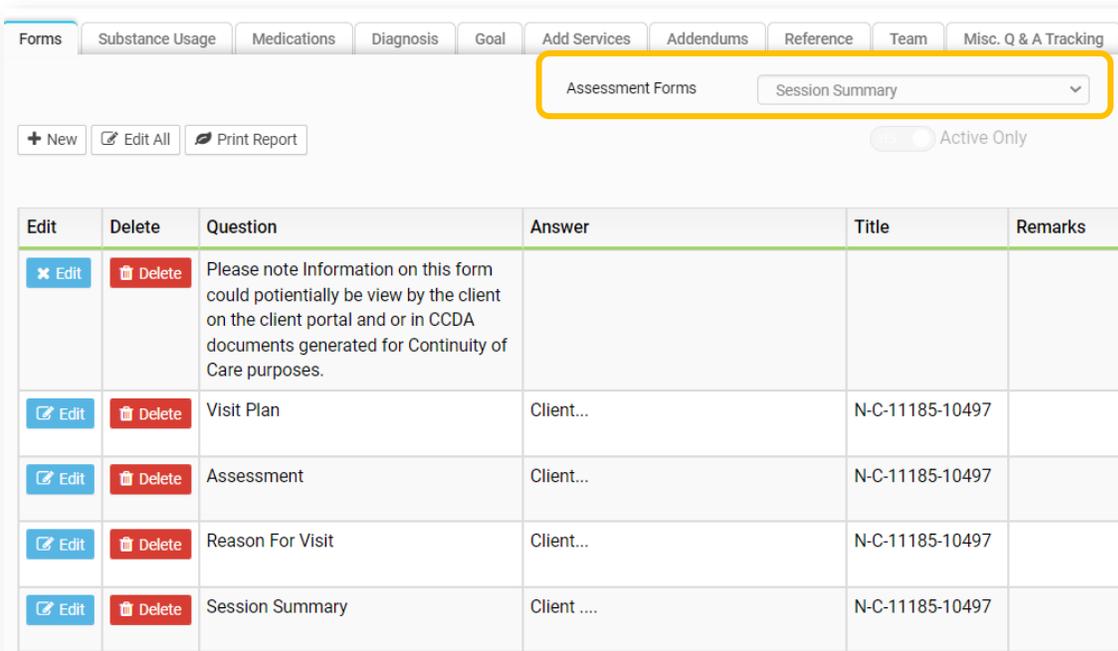
Modifiers: User: Loc.: U7 Col.: Service Location # School:

## 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.



- 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.

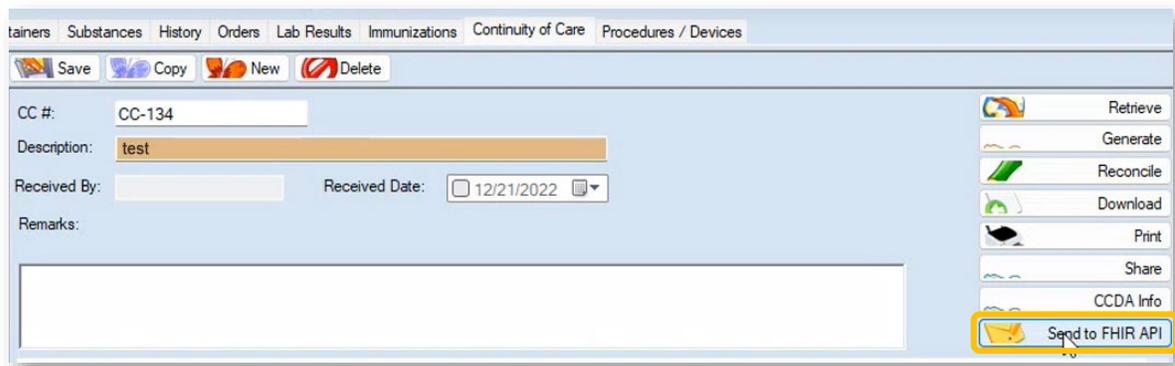


- Specific Client Vitals Questions are included on the CCDA when they have been filled out, just like in the Desktop application.

- 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

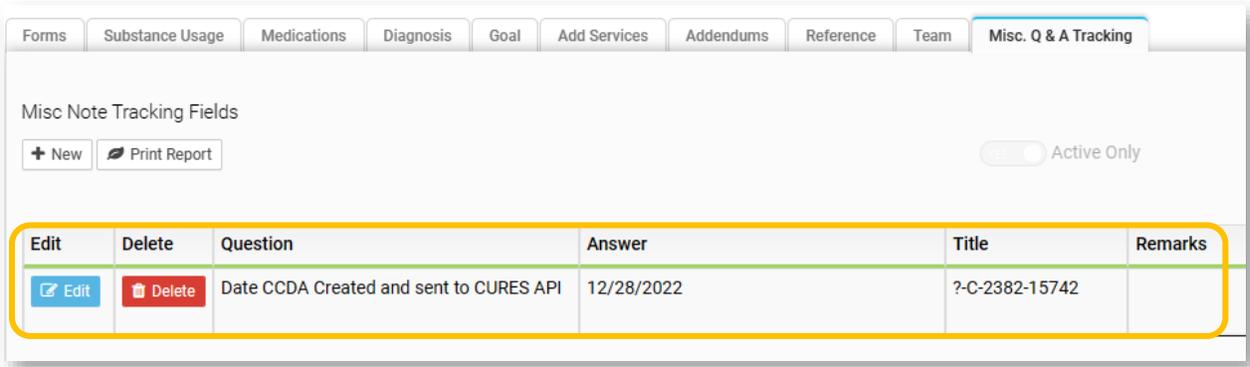
## PLATINUM PLAN

- 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.



## 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



The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'Forms', 'Substance Usage', 'Medications', 'Diagnosis', 'Goal', 'Add Services', 'Addendums', 'Reference', 'Team', and 'Misc. Q & A Tracking'. Below the navigation bar, the 'Misc Note Tracking Fields' section includes a '+ New' button, a 'Print Report' button, and an 'Active Only' toggle switch. A table with a yellow border highlights the following data:

Edit	Delete	Question	Answer	Title	Remarks
<a href="#">Edit</a>	<a href="#">Delete</a>	Date CCDA Created and sent to CURES API	12/28/2022	?-C-2382-15742	

- 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).