

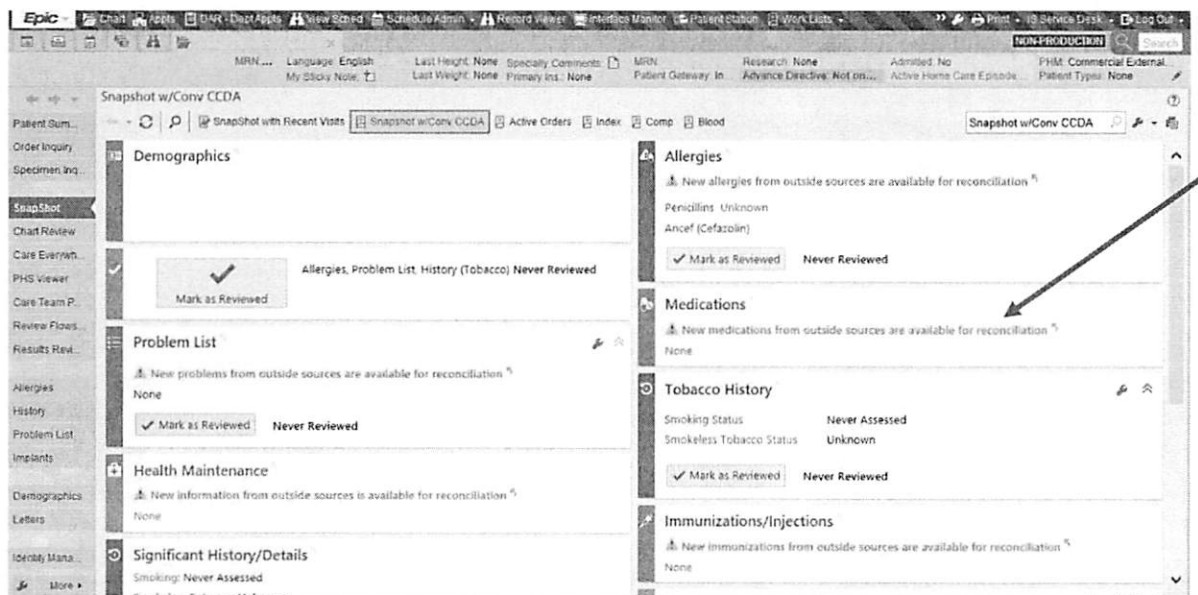
Reconciling PMA Conversion CCDAs in Epic

The process outlined below can be done before or during a patient visit in Epic. CCDAs documents were uploaded to the majority of your active patient population in Epic prior to your go-live. Each CCA could contain four reconciliable data types - Allergies, Medications, Problems, and Immunizations. The indication that you are reconciling data from a conversion CCA from your site is indicated by the presence of your site's name (PMA) in the "Source" column in the **Reconcile Outside Info** screen. There may be other read-only data types contained on the CCDAs; you can access these other sections by utilizing the "Snapshot w/Conv CCA" Snapshot view.





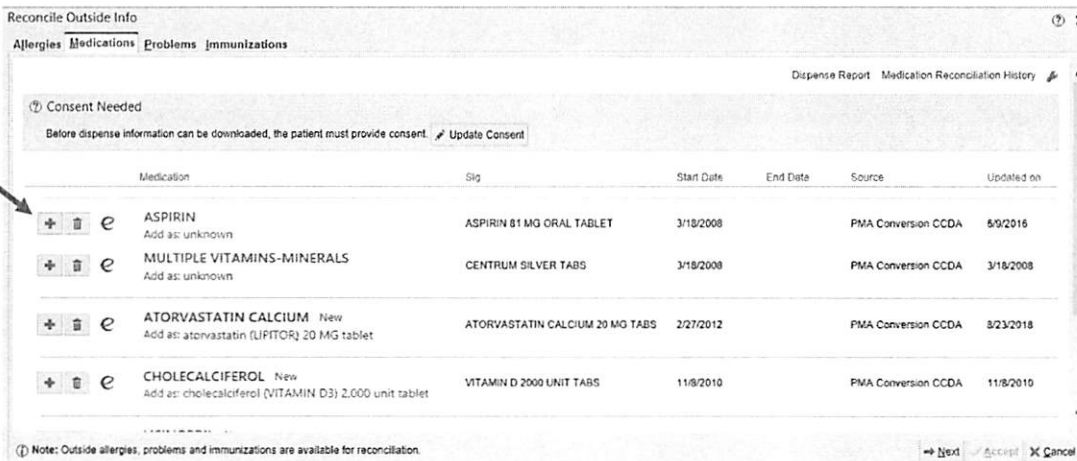
Try it out!

- 1) If you want to reconcile a CCA prior to a patient visit, do so by navigating to **Epic button > Patient Care > Chart** and then entering the patient information. You can also *single click* on a patient from the **Schedule**. (Note: do not double click into the Schedule, as this will create an Encounter.)
- 2) The presence of a yellow triangle with **New medications from outside sources are available for reconciliation** link in orange indicates that there is data to be reconciled. This link could also show in the Allergies, Problems, and Immunizations sections. Click on the link to open the **Reconcile Outside Info** activity.















4) On the **Reconcile Outside Info** screen you will see tabs for Allergies, Immunizations, Medications, and Problems. Click on the **Medications** tab to view the active medication data from your legacy system.

Click  to add or  to delete a medication.



Reconcile Outside Info

Consent Needed
Before dispense information can be downloaded, the patient must provide consent. [Update Consent](#)

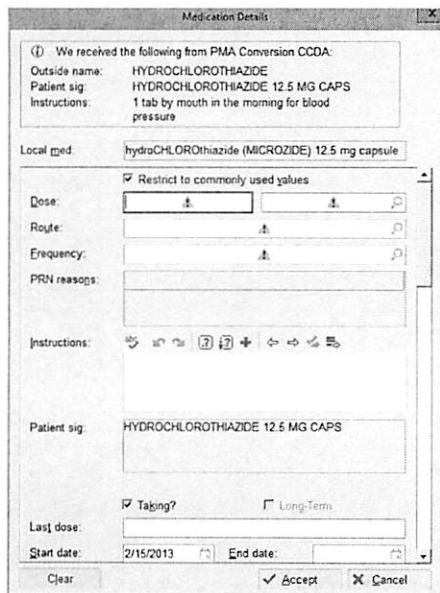
Medication	Sig	Start Date	End Date	Source	Updated on
   ASPIRIN Add as: unknown	ASPIRIN 81 MG ORAL TABLET	3/18/2008		PMA Conversion CCDA	6/9/2016
   MULTIPLE VITAMINS-MINERALS Add as: unknown	CENTRUM SILVER TABS	3/18/2008		PMA Conversion CCDA	3/18/2008
   ATORVASTATIN CALCIUM New Add as: atorvastatin (LIPITOR) 20 MG tablet	ATORVASTATIN CALCIUM 20 MG TABS	2/27/2012		PMA Conversion CCDA	8/23/2018
   CHOLECALCIFEROL New Add as: cholecalciferol (VITAMIN D3) 2,000 unit tablet	VITAMIN D 2000 UNIT TABS	11/8/2010		PMA Conversion CCDA	11/8/2010

Note: Outside allergies, problems and immunizations are available for reconciliation.

[Next](#) [Accept](#) [Cancel](#)

Note: If you do not click add or discard, the data will remain and be available to take action upon the next time this activity is opened. Discarding will remove the data permanently from the chart.

5) After clicking the **Add** button verify medication name, enter dose, route, and frequency, and click **Accept**.



Medication Details

We received the following from PMA Conversion CCDA:
 Outside name: HYDROCHLOROTHIAZIDE
 Patient sig: HYDROCHLOROTHIAZIDE 12.5 MG CAPS
 Instructions: 1 tab by mouth in the morning for blood pressure

Local med: hydroCHLORothiazide (MICROZIDE) 12.5 mg capsule

☒ Restrict to commonly used values

Dose:

Route:

Frequency:

PRN reasons:

Instructions:

Patient sig: HYDROCHLOROTHIAZIDE 12.5 MG CAPS

☒ Taking? ☐ Long-Term

Last dose:

Start date: 2/15/2013 End date:

[Clear](#) [Accept](#) [Cancel](#)

6) If the medication name does not match exactly with a coded medication in Epic (which is indicated by an orange question mark to left of medication name) search for it in the **Local med** field.

7) Click **Accept** to add the medication and return to the Reconcile Outside Info activity.

8) Click **Accept** to save and exit the **Reconcile Outside Info** screen or click **Accept/Next** and move on to another reconcilable data type before clicking **Accept** to exit out of the **Reconcile Outside Info** section.

9) The process to reconcile Allergies, Immunizations, and Problems from the CCDA is very similar to the steps involved in reconciling Medications above. Remember that any item listed in purple is *uncoded* and will need to be mapped to a coded item in Epic before you can add it to a patient's chart.

10) The CCDAs may contain some additional information. You can access this data by changing your SnapShot view to "**Snapshot w/Conv CCDA**". Navigate to the **Imported Legacy Documents** section and click into the **Continuity of Care Document** to view the other read-only data types contained on the CCDA.

Source	Document Type	Created
PMA Conversion CCDA	Continuity of Care Document	01/04/2019