







This Quick Reference Guide (QRG) reviews how to perform the preload via CCD.

Common Buttons & Icons

	Purple Diamond icon
	Add button
	Discard button
	Add drop-down arrow
	Component Refresh icon
	X Close button
	Saved icon

Reconcile CCD (Continuity of Care Documents)

➤ From the PowerChart Home screen:

STEP 1: Click the **Search** field drop-down arrow; then click **MRN**.

STEP 2: Enter the MRN of the record you need in the Search field; then press [**Enter**].

STEP 3: Click the correct patient in the top pane.

STEP 4: Click the appropriate historical encounter in the bottom pane.

NOTE: Historical encounters are noted with an HX at the beginning of the FIN.

STEP 5: Click **OK** to confirm.

STEP 6: Click the **XDocs** hyperlink in the blue banner bar. The Outside Records screen displays.

STEP 7: Select the check box for the appropriate CCD.

STEP 8: Click the **Reconciliation** link in the upper right-hand corner of the Outside Documents tab. The Reconciliation View window opens.

NOTE: You may need to maximize your screen to full view to make sure nothing is hidden.

NOTE: Items with a purple diamond must be addressed. Any items not addressed will display a purple diamond icon for subsequent encounters.

Reconcile the Histories Component

➤ From the Historical Documents Reconciliation View:

STEP 1: Click **Lifetime** in the Problems tab.

NOTE: Compare the CCD unverified data in the top view pane against the verified data in the bottom pane for all components.

STEP 2: Click **Discard** for duplicates that are an exact match to prevent duplicate entries in the medical record.

STEP 3: Click **Add** for items that are not an exact match.

NOTE: All Free Text items should be discarded once they are manually entered into Cerner.

STEP 4: Once you have addressed all the problems in the component, click **Complete Reconciliation** at the bottom of the component.

STEP 5: Click the **Procedures/Surgeries** tab.

NOTE: You may not see any data within this tab. However, you must click this tab to continue.

Reconcile the Allergies Component

➤ From the Historical Documents Reconciliation View:

STEP 1: Proceed to the Allergies component.

STEP 2: Click **Discard** for duplicates.

NOTES:

1. No Known Drug Allergies does not exist within Cerner as No Known Medication Allergies is used instead. You must discard No Known Drug Allergies or NKDA.
2. To add No Known Medication Allergies to the Cerner EHR, complete the following steps:
 - Click the Allergies component header.
 - Click No Known Medication Allergies.
 - Click OK.
 - Click the XDocs hyperlink in the blue banner bar.
 - Click Reconciliation. You return to the Reconciliation.
 - You may not see any data within this tab. However, you must click this tab to continue.

STEP 3: Click Add for items that are not an exact match.

NOTES: When adding an item, if the item is a free-text item, a Details column opens to the right. To add the item in Cerner:

- Click the Search field. Options from Cerner display.
- Click the appropriate option.
- Click the Add drop-down arrow.
- Click Add with Changes.
- Document any required fields, as needed.
 - Fields with red asterisks are required documentation.
- Click Save.

STEP 4: Once you have addressed all the allergies in the component, click the Allergies component **Refresh** icon.

STEP 5: Click **Complete Reconciliation** at the bottom of the component.

Reconcile the Medications Component

➤ From the Allergies component:

STEP 1: Proceed to the **Medications** component.

NOTE: All medications will contain missing fields and parts. If confusion exists between which med list is more accurate/up to date, add the medication with the most recent prescription date. A detailed, careful medication reconciliation should be done with the patient at the first visit in Cerner or over the phone, such as during a refill request phone call.

STEP 2: Click **Lifetime**.

STEP 3: Click **Discard** for duplicates that are an exact match.

NOTE: You should discard medications that were prescribed for a defined short period of time. For example, a medication with instructions to take for 10 days that was prescribed 6 months ago.

STEP 4: Click **Add** for items that are not an exact match.

NOTE: To add a medication to the verified data list:

- Click the medication.
- Click the Add drop-down arrow in the Details pane.
- Click Add with Changes.
- Document the medications details, as needed.
- Click Save.

NOTE: Click the **Complete History** button to document the medication if any medications need to be entered manually.

STEP 5: Once you have addressed all the medications in the component, click the Medications component **Refresh** icon.

Reconcile the Immunizations Component

➤ From the Medications component:

STEP 1: Proceed to the **Immunizations** component.

NOTES:

- Accept all immunizations available.
- Review prior immunizations to confirm older immunizations successfully migrated.
- Adult patient immunizations can be reviewed within the CCD member organization prior to Cerner; Pediatric immunizations can be reviewed in the CCD, the Impact, State of Maine website, or the member organization prior to Cerner.

STEP 2: Click Add for items that are not an exact match.

NOTES:

- Remove any Free Text items; then add them into the record.
- Add immunizations that fail to convert to the Cerner record by clicking the Immunizations header and using the Document Historical Immunizations workflow.

STEP 3: Click **Discard** for any duplicate entries.

STEP 4: Once you have addressed all the immunizations in the component, click the Immunizations component **Refresh** icon.

STEP 5: When all the purple diamonds have been addressed, click the **X Close** button. You return to the Outside Records screen.

STEP 6: Click **Save to Chart** .