



tsihealthcare

NextGen 5.9/8.4 Upgrade EHR Training

Custom CCD Viewer

Agenda

- Custom CCD Viewer
 - Access
 - New option to create user friendly views
 - Ability to set and save multiple configurations
 - Ability to save filters

Custom View

- The CCD custom view can be accessed within:
 - Clinical Reconciliation Module
 - *Please watch the Clinical Reconciliation Training Video*
 - If a CCD is open in EHR
 - Rosetta Holding Tank
 - Medical Summary Utility
- Users can create custom views that are applicable to their role
 - Referral coordinators (demographics, payers, problems)
 - Clinical Staff
 - Providers

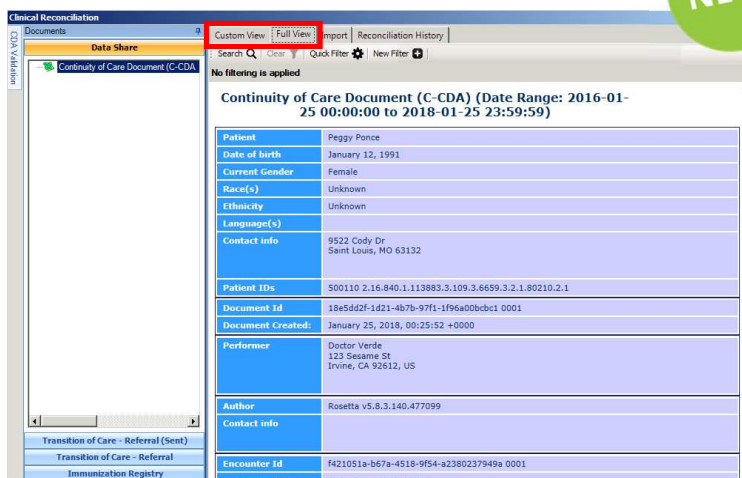
Custom View

- From within the clinical reconciliation module you are able to toggle between various views of the Continuity of Care Document
 - **Custom View** – user specific view
 - **Full View** – standard CCD view

The screenshot shows the 'Clinical Reconciliation' interface. At the top, there are tabs for 'Documents', 'Data Share', 'Custom View', 'Full View', 'Import', and 'Reconciliation History'. The 'Custom View' tab is selected and highlighted with a red box. Below the tabs, there is a list of document types, including 'Continuity of Care Document (C-CD)'. The main content area displays patient information for Peggy Ponce, including demographics, header, medications, allergies, problems, immunizations, results, encounters, vital signs, and procedures. A green 'NEW!' badge is overlaid on the top right of the screenshot.

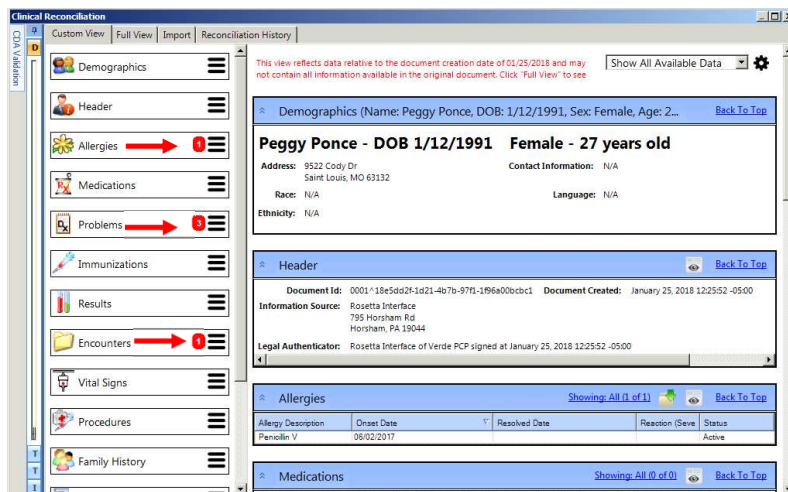
Custom View

- From within the clinical reconciliation module you are able to toggle between various views of the Continuity of Care Document
 - Custom View** – user specific view
 - Full View** – standard CCD view



Custom View

- The Custom Viewer allows users to arrange the information from the CCD in their preferred order
- Custom view easily shows how many items are included in each section



Custom View

- By clicking on each individual tab you are able to navigate to different areas of the document

This view reflects data relative to the document creation date of 01/25/2018 and may not contain all information available in the original document. Click 'Full View' to see

Demographics (Name: Peggy Ponce, DOB: 1/12/1991, Sex: Female, Age: 2... [Back To Top](#))

Peggy Ponce - DOB 1/12/1991 Female - 27 years old

Address: 9522 Cody Dr, Saint Louis, MO 63132 Contact Information: N/A
 Race: N/A Language: N/A
 Ethnicity: N/A

Header [Back To Top](#)

Document Id: 0001-10e5d03f-1d21-4b7b-97f1-196a070bc0c1 Document Created: January 25, 2018 12:25:52 -0500
 Information Source: Rosetta Interface, 795 Horsham Rd, Horsham, PA 19044
 Legal Authenticator: Rosetta Interface of Verde PCP signed at January 25, 2018 12:25:52 -0500

Allergies [Showing: All \(1 of 1\)](#) [Back To Top](#)

Allergy Description	Onset Date	Resolved Date	Reaction (Sev)	Status
Penicillin V	06/02/2017			Active

Medications [Showing: All \(0 of 0\)](#) [Back To Top](#)

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Custom View

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Allergies [Showing: All \(1 of 1\)](#) [Back To Top](#)

Allergy Description	Onset Date	Resolved Date	Reaction (Sev)	Status
Penicillin V	06/02/2017			Active

Medications [Showing: All \(0 of 0\)](#) [Back To Top](#)

There was no content to display for this section. Either the CDA document does not have content in this section or the data which was sent could not be extracted. If you would like to see what was in the CDA document for this section please click the "Eye" icon.

Problems [Showing: All \(3 of 3\)](#) [Back To Top](#)

Problem Description	Onset Date	Resolved Date	Status
Chest pain	06/02/2017		Active
Diabetes mellitus	06/02/2017		Active
Hepatic failure	06/02/2017		Active

Immunizations [Showing: All \(0 of 0\)](#) [Back To Top](#)

There was no content to display for this section. Either the CDA document does not have content in this section or the data which was sent could not be extracted. If you would like to see what was in the CDA document for this section please click the "Eye" icon.

Results [Showing: All \(0 of 0\)](#) [Back To Top](#)

There was no content to display for this section. Either the CDA document does not have content in this section or the data which was sent could not be extracted. If you would like to see what was in the CDA document for this section please click the "Eye" icon.

Encounters [Showing: All \(1 of 1\)](#) [Back To Top](#)

Description	Practice	Location	Reason For Visit	Diagnosis	Date	Provider
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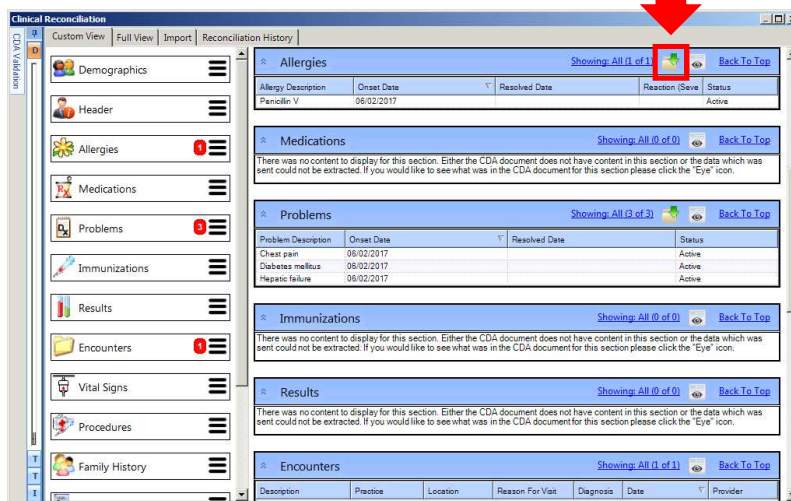
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Custom View

- The quick links in each section facilitate easier navigation
 -  to the reconciliation screen




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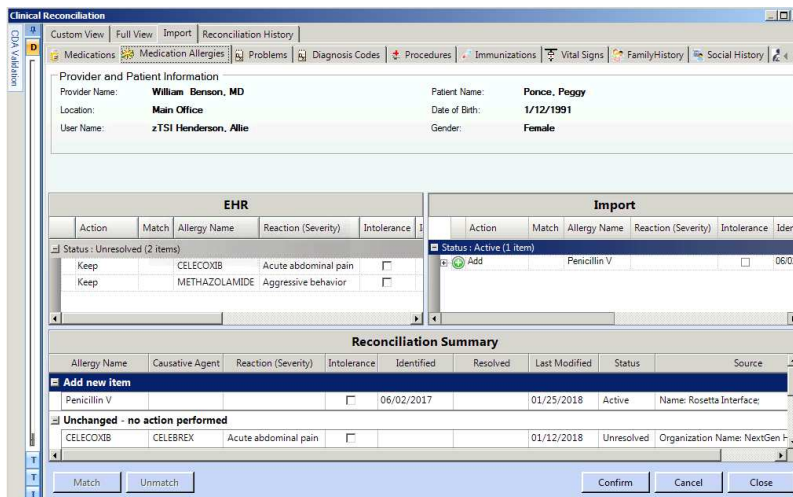
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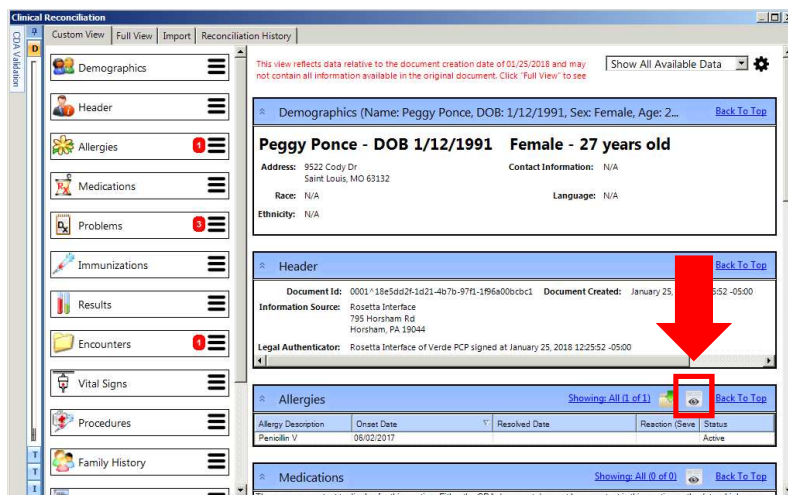
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Custom View

- The quick links in each section facilitate easier navigation
 -  to the reconciliation screen
 -  to human readable view for the section



Custom View

- The quick links in each section facilitate easier navigation
 -  to the reconciliation screen
 -  to full view for the section

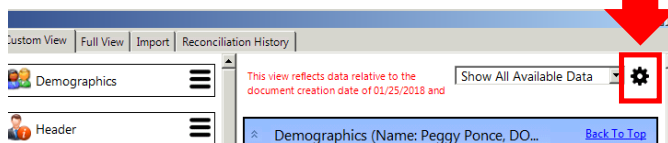
Allergies - Human Readable View

Allergies, Adverse Reactions, Alerts

Substance	Reaction	Severity	Status
penicillin V		Unknown	Active

Custom View

- Ability to save your custom view layout by selecting the gear icon in the top right corner
- Select the “create new filter” option and enter your view name
- Select “next”



CDA Filter Configuration Options

- Can unselect options you do not need to view each time



CDA Filter Configuration Options

- Can unselect options you do not need to view each time



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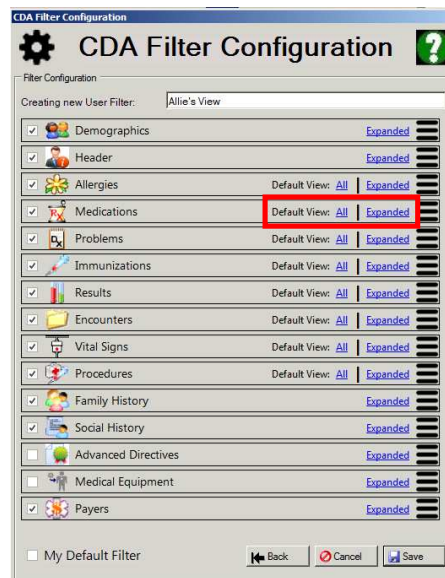
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CDA Filter Configuration Options

- Can unselect options you do not need to view each time
- Can modify the “default view” for certain modules



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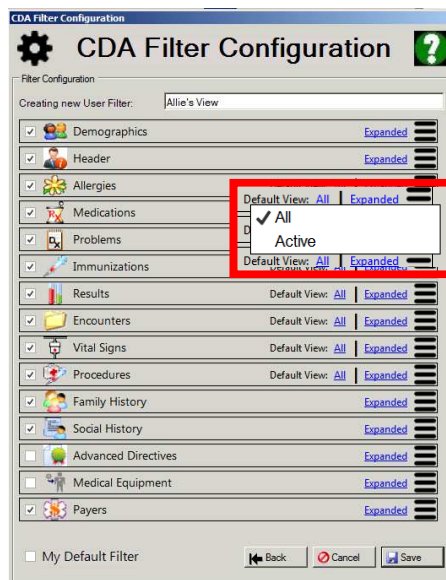
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CDA Filter Configuration Options

- Can unselect options you do not need to view each time
- Can modify the “default view” for certain modules
 - Either view “all” items in the section or only “active” items



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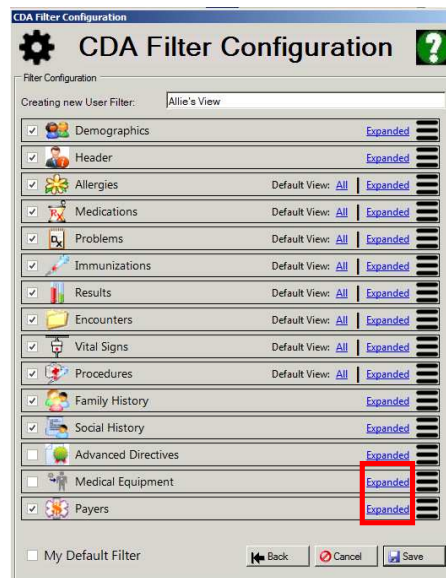
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CDA Filter Configuration Options

- Can unselect options you do not need to view each time
- Can modify the “default view” for certain modules
 - Either view “all” items in the section or only “active” items
- Ability to expand or collapse each section




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- Can modify the “default view” for certain modules
 - Either view “all” items in the section or only “active” items
- Ability to expand or collapse each section
- Ability to reorder the sections by selecting the  icon and dragging the section to your desired order




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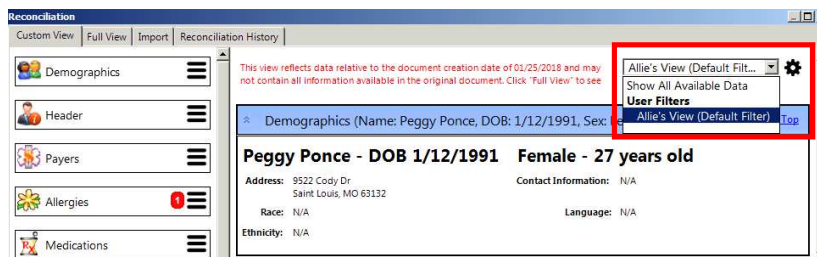
CDA Filter Configuration Options

- Can save the filter view as your default view by selecting “My Default Filter”
- Then click “save”



CDA Filter Configuration Options

- Can switch between your custom view and “Show all Available Date” view





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