Updox Patient Portal CCD Viewer

1. Notes

A. CCD Versions
The viewer supports the C-CDA versions 1.1 and 2.1

B. CCD Sections
The information that displays in the CCD Viewer for a particular section, is controlled by the structure of the xml file, more specifically by the <text> … </text> portion of the section. See an example in the Appendix.

C. CCD Header
The CCD header contains quite a bit of data. To make it easier to digest, the basic patient information (name, address, demographics) is at the top and the following information from the CCD header displays as sections.
- o Care team
- o Dates (Component of)
- o Documentation (Documentation of)
- o Participants
- o Contributors
    - Author
    - Legal Authenticator
    - Authenticators
    - Informants
    - Information Recipients
    - Referring Provider
    - Office Contact
- o Footer
    - Created date
    - Confidentiality code (Normal, Restricted, Very Restricted)
    - CCD ID
    - CCD Title
    - Version

D. CCD Contents
Since the HL7 C-CDA standard is quite flexible, the presentation method and the data fields that display are dependent on the EHR that created the CCD as well the data that is on file for the patient.

2. Select CCD

- Enter date range to search for CCDs received (defaults to the last 30 days).
- Select CCD to view.
- Click View button.

3. View CCD

- All sections in the CCD are automatically expanded.
- To simplify the display, click **Collapse All** then expand the individual section(s) as needed.
- To re-expand all sections, click **Expand All**.
- To display contact info for the various people/organizations, click the **Contact** buttons.
- To change the order of sections, click the arrow icons to move a section up or down.
- To print a report of the CCD, click **Print CCD**.
- To define your default viewing preferences, click **View Preferences**.
- To return to the selection screen, click your browser's back arrow.

4. Define Viewing Preferences

- To change which sections automatically display in your default view, click the checkbox before the section name. (When viewing a CCD, you can still access unchecked sections by opening **View Preferences** and clicking the section name).
- To change the default order of sections, use the arrows to move sections up and down in the list.
- To re-select all sections and revert to alphabetical order, click **Reset Preferences**.
- To save, click **Save Preferences**.
- To exit the preferences screen, click the **View Preferences** menu bar.

Appendix - Example C-CDA xml File

Here is an example medication section from a CCD xml file. The yellow highlighted portion defines the method and data that displays.

```
<component>
  <section>
    <templateId root = "2.16.840.1.113883.10.20.22.2.1.1" extension = "2014-06-09"/>
    <templateId root = "2.16.840.1.113883.10.20.22.2.1.1"/>
    <code code = "10160-0" codeSystem = "2.16.840.1.113883.6.1" codeSystemName = "LOINC"
displayName = "HISTORY OF MEDICATION USE"/>
    <title>MEDICATIONS</title>
    <text>
      <table border = "1" width = "100%">
        <thead>
          <tr>
            <th>Medication</th>
            <th>Directions</th>
            <th>Start Date</th>
            <th>End Date</th>
          </tr>
        </thead>
        <tbody>
          <tr>
            <td>Ceftriaxone 100 MG/ML Injectable Solution  [309090]</td>
            <td>One Unit Two Times Daily</td>
            <td>6/22/2015</td>
            <td>6/30/2015</td>
          </tr>
          <tr>
            <td>Tylenol 500 MG Oral Tablet  [209459]</td>
            <td>One Unit for 10 days as Needed</td>
            <td>6/22/2015</td>
            <td>Unknown</td>
          </tr>
          <tr>
            <td>Aranesp 0.5 MG/ML  [731241]</td>
            <td>One Unit Once a Week</td>
            <td>6/22/2015</td>
            <td>Unknown</td>
          </tr>
        </tbody>
      </table>
    </text>
    <entry typeCode = "DRIV">
      <substanceAdministration classCode = "SBADM" moodCode = "EVN">
        <templateId root = "2.16.840.1.113883.10.20.22.4.16" extension = "2014-06-09"/>
        <templateId root = "2.16.840.1.113883.10.20.22.4.16"/>
        <id root = "cdbd33f0-6cde-11db-9fe1-0800200c9a66"/>
        <statusCode code = "active"/>
```

```xml
            <effectiveTime xsi:type = "IVL_TS">
              <low value = "20150622"/>
              <high value = "20150630"/>
            </effectiveTime>
            <effectiveTime xsi:type = "PIVL_TS" institutionSpecified = "true" operator = "A">
              <period value = "12" unit = "h"/>
            </effectiveTime>
            <routeCode code = "C38276" codeSystem = "2.16.840.1.113883.3.26.1.1" codeSystemName =
"NCI Thesaurus" displayName = "INTRAVENOUS"/>
            <doseQuantity value = "1"/>
            <consumable>
              <manufacturedProduct classCode = "MANU">
                <templateId root = "2.16.840.1.113883.10.20.22.4.23" extension = "2014-06-09"/>
                <templateId root = "2.16.840.1.113883.10.20.22.4.23"/>
                <id root = "2a620155-9d11-439e-92b3-5d9815ff4ee8"/>
                <manufacturedMaterial>
                  <code code = "309090" codeSystem = "2.16.840.1.113883.6.88" displayName =
"Ceftriaxone 100 MG/ML Injectable Solution"/>
                </manufacturedMaterial>
              </manufacturedProduct>
            </consumable>
          </substanceAdministration>
        </entry>
        <entry typeCode = "DRIV">
          <substanceAdministration classCode = "SBADM" moodCode = "EVN">
            <templateId root = "2.16.840.1.113883.10.20.22.4.16" extension = "2014-06-09"/>
            <templateId root = "2.16.840.1.113883.10.20.22.4.16"/>
            <id root = "6c844c75-aa34-411c-b7bd-5e4a9f206e29"/>
            <statusCode code = "active"/>
            <effectiveTime xsi:type = "IVL_TS">
              <low value = "20150622"/>
              <high value = "20150701"/>
            </effectiveTime>
            <effectiveTime xsi:type = "PIVL_TS" institutionSpecified = "true" operator = "A">
              <period value = "24" unit = "h"/>
            </effectiveTime>
            <routeCode code = "C38288" codeSystem = "2.16.840.1.113883.3.26.1.1" codeSystemName =
"NCI Thesaurus" displayName = "ORAL"/>
            <doseQuantity value = "1"/>
            <consumable>
              <manufacturedProduct classCode = "MANU">
                <templateId root = "2.16.840.1.113883.10.20.22.4.23" extension = "2014-06-09"/>
                <templateId root = "2.16.840.1.113883.10.20.22.4.23"/>
                <id root = "2a620155-9d11-439e-92b3-5d9816ff4ee8"/>
                <manufacturedMaterial>
                  <code code = "209459" displayName = "Tylenol 500 MG Oral Tablet" codeSystem =
"2.16.840.1.113883.6.88" codeSystemName = "RxNorm"/>
                </manufacturedMaterial>
              </manufacturedProduct>
            </consumable>
```

```
                </substanceAdministration>
            </entry>
            <entry typeCode = "DRIV">
                <substanceAdministration classCode = "SBADM" moodCode = "EVN">
                    <templateId root = "2.16.840.1.113883.10.20.22.4.16" extension = "2014-06-09"/>
                    <templateId root = "2.16.840.1.113883.10.20.22.4.16"/>
                    <id root = "cdbd33f0-6cde-11db-9fe1-0800200c9a67"/>
                    <statusCode code = "active"/>
                    <effectiveTime xsi:type = "IVL_TS">
                        <low value = "20150622"/>
                        <high nullFlavor = "UNK"/>
                    </effectiveTime>
                    <effectiveTime xsi:type = "PIVL_TS" institutionSpecified = "true" operator = "A">
                        <period value = "7" unit = "d"/>
                    </effectiveTime>
                    <routeCode code = "C38276" codeSystem = "2.16.840.1.113883.3.26.1.1" codeSystemName =
"NCI Thesaurus" displayName = "INTRAVENOUS"/>
                    <doseQuantity value = "1"/>
                    <consumable>
                        <manufacturedProduct classCode = "MANU">
                            <templateId root = "2.16.840.1.113883.10.20.22.4.23" extension = "2014-06-09"/>
                            <templateId root = "2.16.840.1.113883.10.20.22.4.23"/>
                            <id root = "2a620155-9d11-439e-92b3-5d9817ff4ee8"/>
                            <manufacturedMaterial>
                                <code code = "731241" codeSystem = "2.16.840.1.113883.6.88" displayName =
"Aranesp 0.5 MG/ML"/>
                            </manufacturedMaterial>
                        </manufacturedProduct>
                    </consumable>
                </substanceAdministration>
            </entry>
        </section>
    </component>
```

Here is how that medication section displays in the CCD Viewer:

📷 Medications			
Medication	**Directions**	**Start Date**	**End Date**
Ceftriaxone 100 MG/ML Injectable Solution [309090]	One Unit Two Times Daily	6/22/2015	6/30/2015
Tylenol 500 MG Oral Tablet [209459]	One Unit for 10 days as Needed	6/22/2015	Unknown
Aranesp 0.5 MG/ML [731241]	One Unit Once a Week	6/22/2015	Unknown