

# Merging CCDs with RecordSync & the Reconciliation screen

Last Modified on 04/08/2025 4:52 pm EDT

Please note that if a document is not a CCD, it will be imported as an eDocument. For more information on importing non-CCD documents into eDocuments, please refer to our [Indexing and Tasking eDocuments](#) article.

Follow these steps to Merge/Reconcile CCDs:

1. Once the CCD documents have been imported, open the patient's chart in the EMR (ensure you are on the Timeline Summary screen).

Section	2/12/25	2/13/25	2/14/25	2/16/25	2/17/25	2/18/25	3/3/25	3/10/25	3/12/25	3/13/25	3/19/25	3/26/25	Today
Medications													
Notes													
Immunizations													
Order Results													
Communications													
eDocuments													
Obstetrics													
Vitals													
Health Exchange													
Telehealth													
Authorizations													

2. Click the **Patient Reconciliation** (clipboard icon).



3. From this screen, you can work your reconciliation process in the same manner as you would with Allergens, Medications, Problems, and other categories. You can then set the corresponding statuses in the Action column.

Medications

**Patient Reconciliation for Chart # 24814, Hula, Test 09/19/2016(8.6y) Male**

Allergies, Medications, Problems and Immunizations will be updated as indicated by the Action column.

<input checked="" type="checkbox"/> Action	Allergen	Reactions	Date	Source
Ignore	Acesulfame		01/16/2025	Intake Form
Ignore	Bee Pollen		01/16/2025	Intake Form
Ignore	grass pollen		01/16/2025	Intake Form
Ignore	Latex, Natural Rubber		01/16/2025	Intake Form
Ignore	Magnesium Oxide		01/16/2025	Intake Form
Ignore	Rash Relief Antifungal		01/16/2025	Intake Form
Keep	Acesulfame		05/20/2017	Patient Chart
Keep	Bee Pollen	Hives	03/04/2017	Patient Chart
Keep	grass pollen	rash	12/11/2018	Patient Chart
Keep	Latex, Natural Rubber		05/20/2017	Patient Chart
Keep	Magnesium Oxide		08/13/2019	Patient Chart
Keep	No Known Drug Allergies		03/02/2025	Patient Chart
Keep	Rash Relief Antifungal		05/20/2017	Patient Chart

<input checked="" type="checkbox"/> Action	Medication	Date	Source
Ignore	Levoxyl 125 mcg tablet	01/16/2025	Intake Form
Ignore	Lexapro 10 mg tablet	01/16/2025	Intake Form
Ignore	Wellness Protein 16 gram-90 kcal/60 mL oral liquid	01/16/2025	Intake Form
Keep	Advil Cold and Sinus 30 mg-200 mg tablet 1 TABLET OR...	03/02/2025	Patient Chart
Keep	Levoxyl 125 mcg tablet 1 TABLET ORAL Every Day	11/14/2024	Patient Chart
Keep	Lexapro 10 mg tablet 1 TABLET ORAL Every Day	06/20/2024	Patient Chart
Keep	Wellness Protein 16 gram-90 kcal/60 mL oral liquid 2 LIQ...	06/20/2024	Patient Chart

<input checked="" type="checkbox"/> Action	Problem	Date	Source
Keep	Abrasion of right ear	03/01/2025 - 03/02/2025	Patient Chart
Keep	Chronic kidney disease, stage 5	07/06/2023	Patient Chart
Keep	Essential (primary) hypertension	12/14/2021	Patient Chart
Keep	Pneumonia due to SARS-associated coronavirus	12/15/2023	Patient Chart

Action    Immunization    Date    Source

\* Allergens and Medications will be loaded using today's date if the source date is blank

Retrieve only Active Allergy and Problem CCD values    Encounter 04/01/2025    Preview    Save

CCDA Not Available