## 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).

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« Patient Charts 🗄 • 🗋 Now 🖹 Save 🔽 Details • 🔂 Copy 🔛 Patient • *** More •																
Office Schedule															frankie ever	× Q, •
Thursday Mar 27, 2025 Checked In: 0		rgies			, — — — — — — — — — — — — — — — — — — —	Medio	ations				F	roblems			Patient Photograph	<b>\$</b> \$
No Resources Found (0)	No active allergies			No cu	irrent medicati	ons				No active proble	ems					
																/
Dialysis Rounds 🛛 🗧																
i 🗇 🗇 🗇																
															Patient AMP	\$ ☆
															🕅 Allergies 🔨	-
					Decision	Support In	tervention	Message	s						No active allergies	
	The U.S. Preventive Services Task Force (USPSTF) recommends screening for high blood pressure in												No current medications			
	adults age 18 years and older.			-											🐉 Problems \land	
															No active problems	+
															Chart Tabs	<b>\$</b> ×
		Timeline												<ul> <li>Summary Problem List</li> </ul>		
	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	History Allernies	•
	Medications														Vitals	
	Notes					8	8							B	Quick Picks	<b>\$</b> \$
	inclusion from a														/ /	· · · ·
	immunizations															*
	Order Results														Expression Builder	×
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	Obstetrics														DOS 03/	.//2025 Cot
	Vitals														Time	NGW @ ESI.
	Health Exchange	₹	₽	₹	₹	₹	₽	₽	₽	₽	₽	₽	₹		99215 99214	
	Telehealth														99213 99212	
	Authorizations														99211 MDA	l .
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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.

		Metications	•			
atient Reco	onciliation for Chart # 24	1814, Hula, Test 09/19	)/2016(8.6y)	Male		
Allergies, N	ledications, Problems and	Immunizations will be u	updated as in	dicated by the	Action colu	umn.
Action	Allergen	Reactions	Date	Sou	rce	
Ignore	Acesulfame		01/16/2025	Inta	ke Form	
Ignore	Bee Pollen		01/16/2025	Intal	ke Form	
Ignore	grass pollen		01/16/2025	Intal	ke Form	
Ignore	Latex, Natural Rubber		01/16/2025	Intal	ke Form	
Ignore	Magnesium Oxide		01/16/2025	Intal	ke Form	
Ignore	Rash Relief Antifungal		01/16/2025	Intal	ke Form	
Кеер	Acesulfame		05/20/2017	Pati	ent Chart	
Кеер	Bee Pollen	Hives	03/04/2017	Pati	ent Chart	
Кеер	grass pollen	rash	12/11/2018	Pati	ent Chart	
Кеер	Latex, Natural Rubber		05/20/2017	Pati	ent Chart	
Кеер	Magnesium Oxide		08/13/2019	Pati	ent Chart	
Кеер	No Known Drug Allergies		03/02/2025	Pati	ent Chart	
Кеер	Rash Relief Antifungal		05/20/2017	Pati	ent Chart	
Action	Medication		Date	Sou	rce	
Ignore	Levoxyl 125 mcg tablet		01/16/2025	Intal	ke Form	
Ignore	Lexapro 10 mg tablet		01/16/2025	Intal	ke Form	
Ignore	Wellness Protein 16 gram-90	kcal/60 mL oral liquid	01/16/2025	Intal	ke Form	
Кеер	Advil Cold and Sinus 30 mg-2	00 mg tablet 1 TABLET OR	03/02/2025	Pati	ent Chart	
Кеер	Levoxyl 125 mcg tablet 1 TAB	LET ORAL Every Day	11/14/2024	Pati	ent Chart	
Кеер	Lexapro 10 mg tablet 1 TABL	ET ORAL Every Day	06/20/2024	Pati	ent Chart	
Кеер	Wellness Protein 16 gram-90	kcal/60 mL oral liquid 2 LIQ	06/20/2024	Pati	ent Chart	
Action	Problem		Date	Sou	rce	
Кеер	Abrasion of right ear		03/01/2025 -	03/02/2025 Pati	ent Chart	
Кеер	Chronic kidney disease, stage	5	07/06/2023	Pati	ent Chart	
Кеер	Essential (primary) hypertensi	on	12/14/2021	Pati	ent Chart	
Кеер	Pneumonia due to SARS-ass	ociated coronavirus	12/15/2023	Pati	ent Chart	
C Action	Immunization	ſ	Date	Source		
* Allergens a	and Medications will be loa	ded using today's date	if the source	date is blank		
Retrieve or	nly Active Allergy and Problem Co	D values	ounter 04/04/2	0025	Draview	Caura
	Available	Enc	ounter 04/01/2	V23 V	Fleview	Save