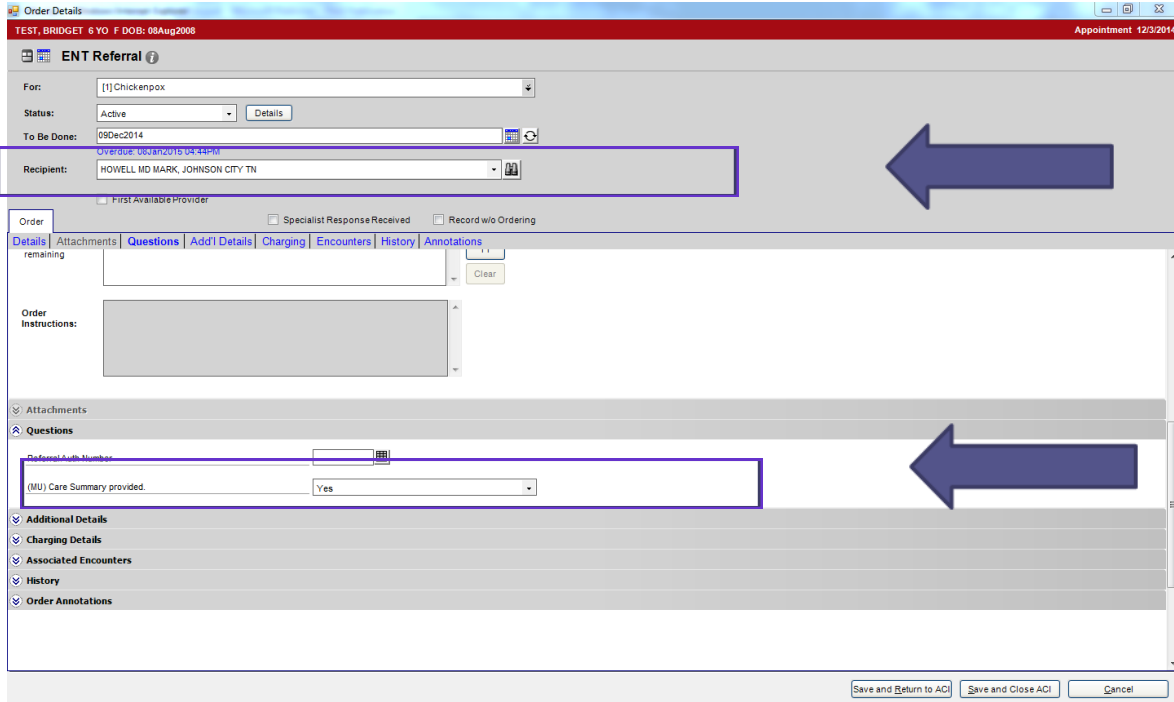
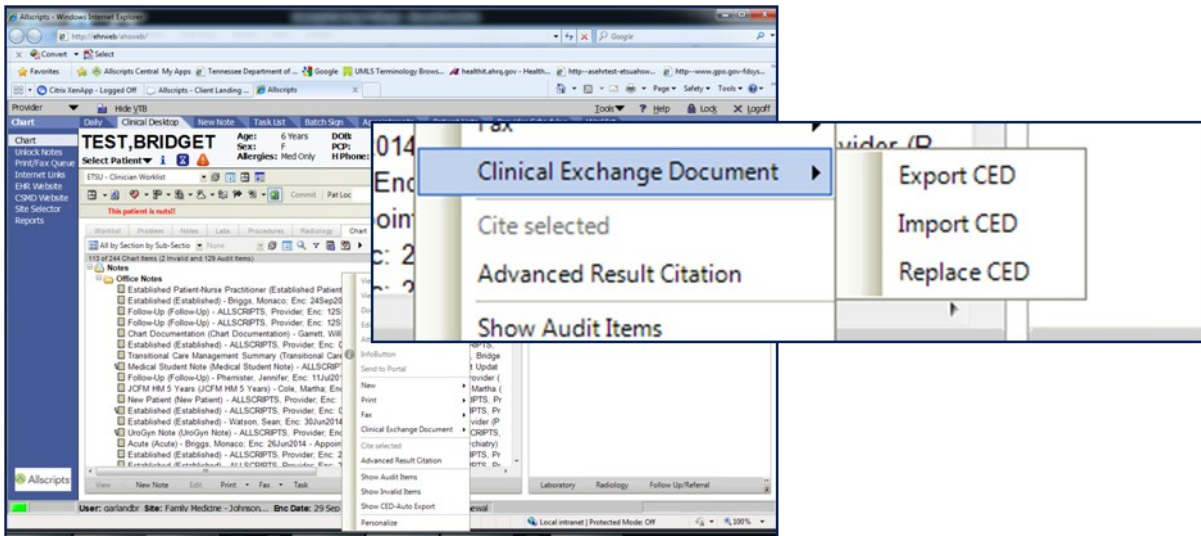


## Referral Workflow for Manually Generating a Summary of Care

1. Within the referral order, make sure that the Recipient field is completed and under the Questions tab, document that the Summary of Care was provided by marking Yes. Save and Close>Commit as usual.

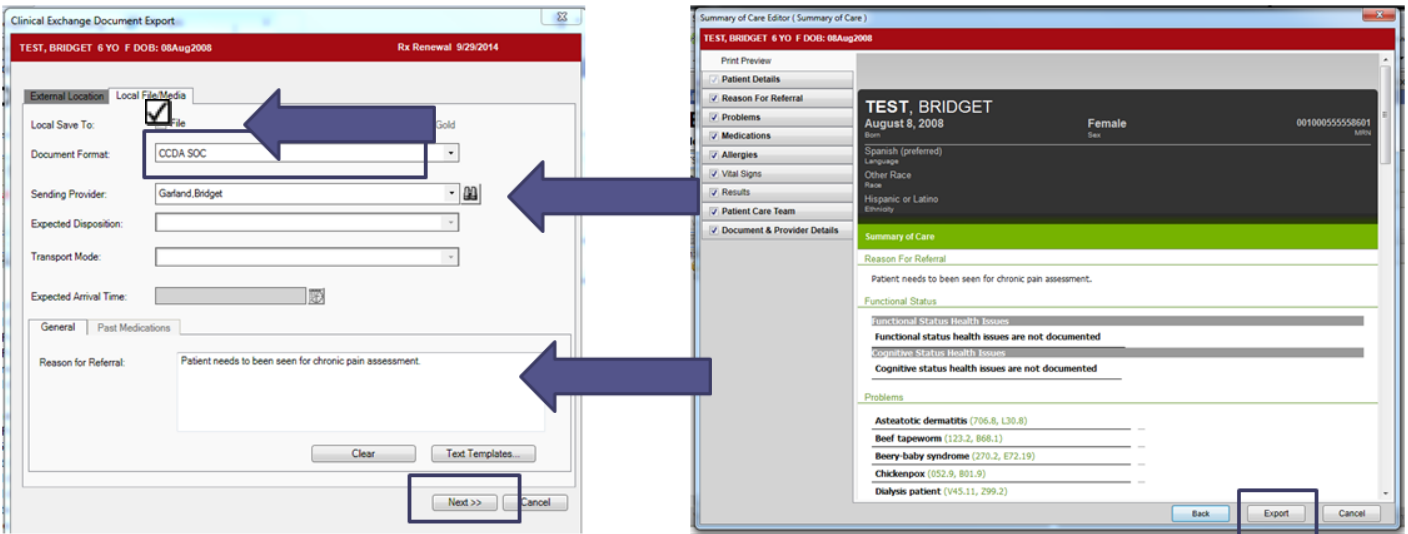


2. Next, right click within the Chart tab and choose Clinical Exchange document>Export CED.

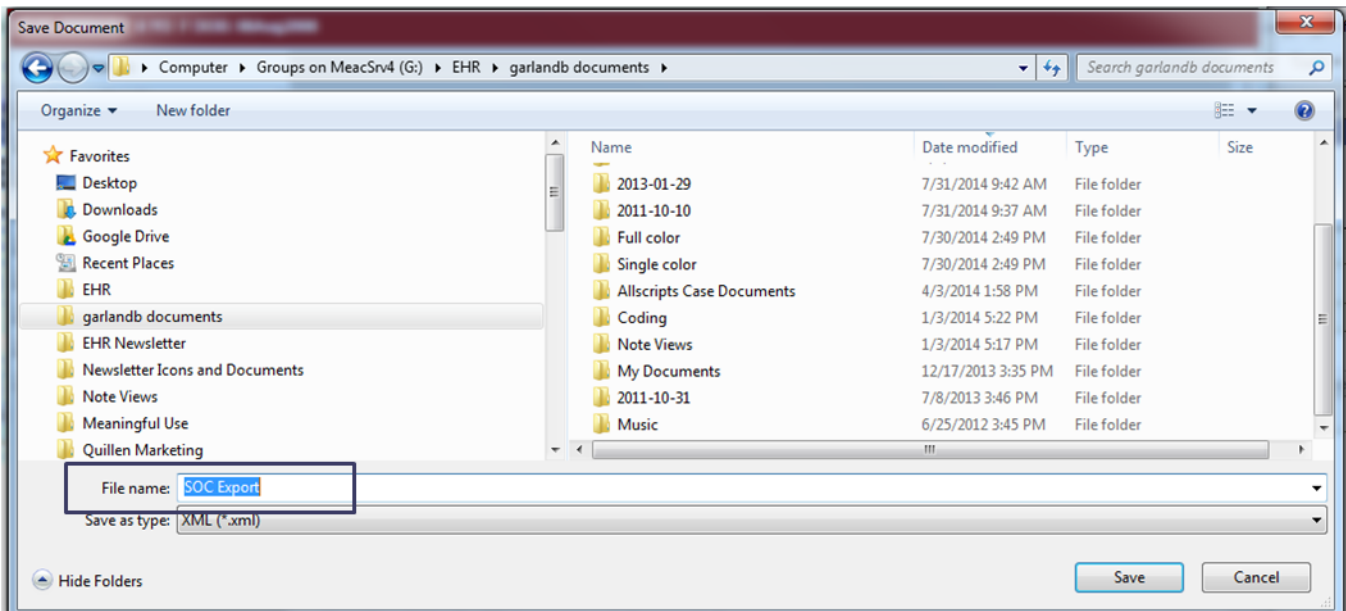


Notes:

- On the next screen, click on the Local File/Media tab, and then check the box next to File. Next, select CCDA SOC as the Document Format. Enter the correct Sending Provider, and then enter a Reason for Referral and Next.
- The next screen will allow the SOC to be edited and then exported. *Note: Please look over the summary and edit as pertains to your practice.*

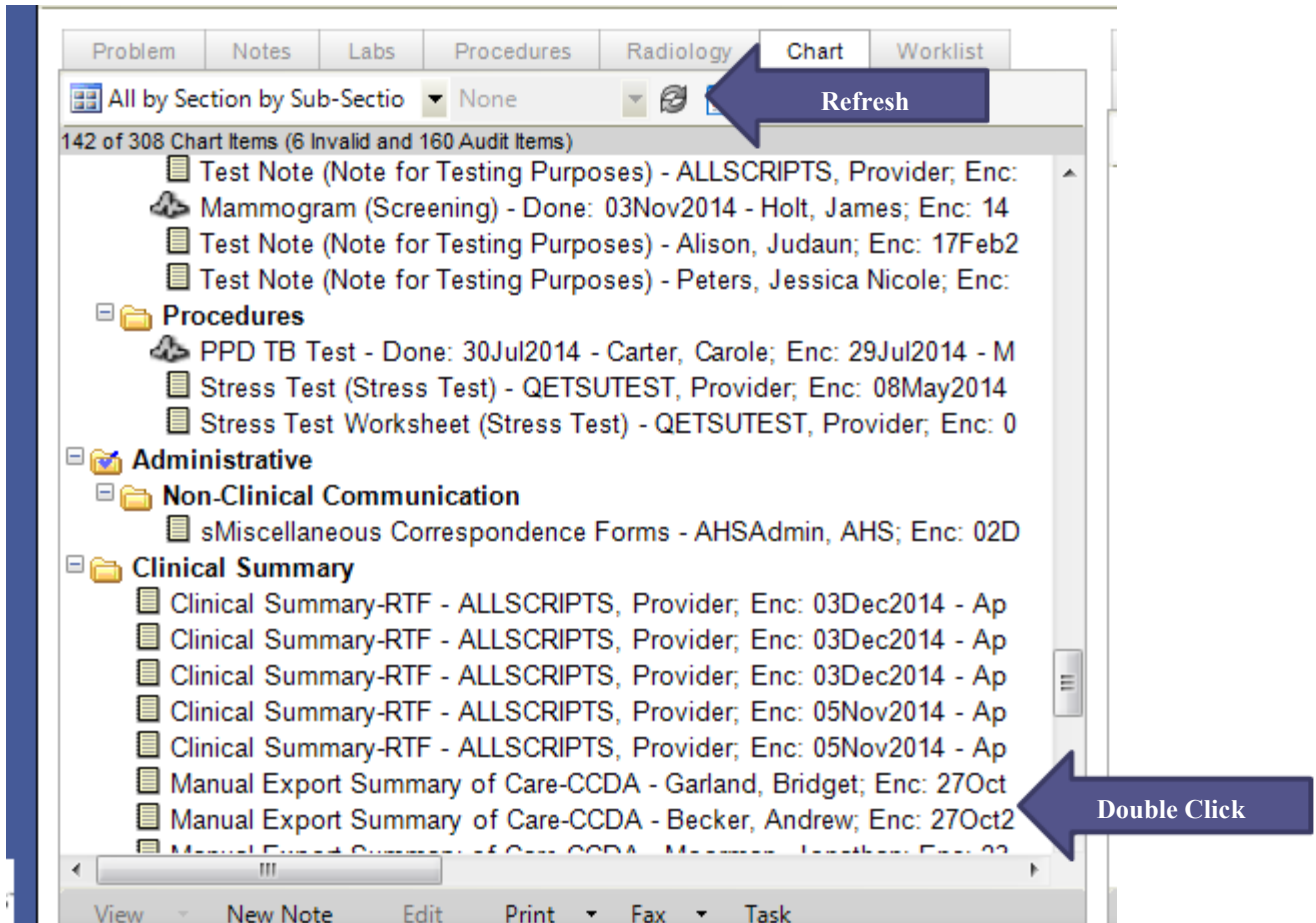


- When exporting to File, enter a name for the document and then click Save. *Note: You can name the file the same name each time and let the document be replaced at each export. You will not be accessing it from this location.*



Notes:

6. To send the Summary of Care, under the Chart tab on the Clinical Desktop, click the Refresh icon and scroll down to the Clinical Summary section of the chart. Locate the Manual Export Summary of Care-CCDA document that was just generated.



7. Double-click on the document and then fax it as usual. *Note: It is important that you double click the document and **not** right click to fax it.*

Notes: