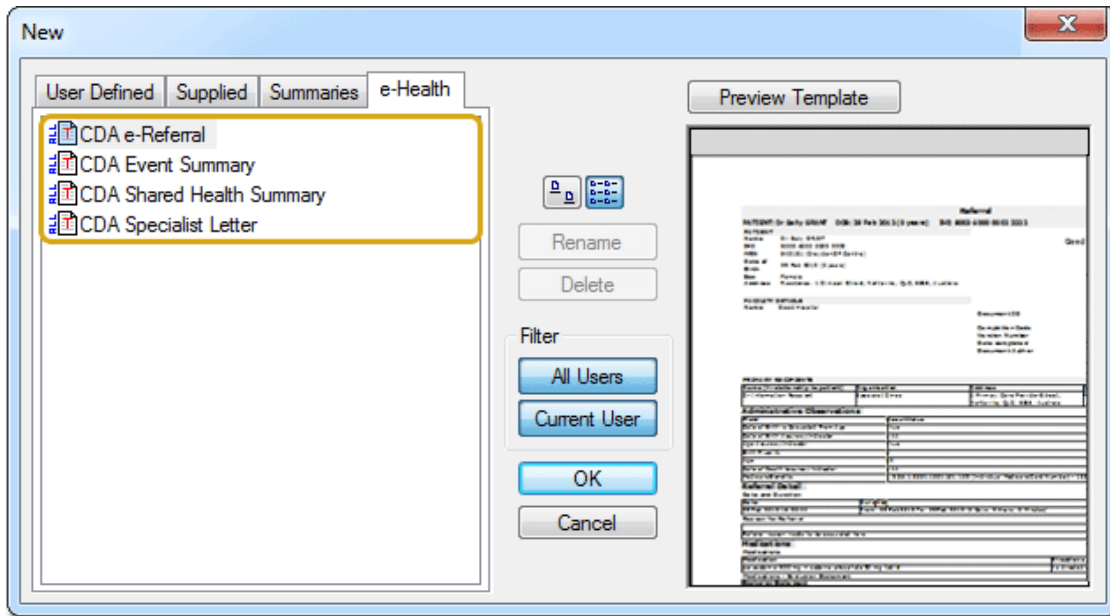


Creating a CDA e-Health Document

1. Ensure you are within a patient's record and have opened Letter Writer.
2. Within Letter Writer, select **File > New**.
3. From the **New** dialogue box, select the e-Health tab and then double-click a CDA e-Health template.

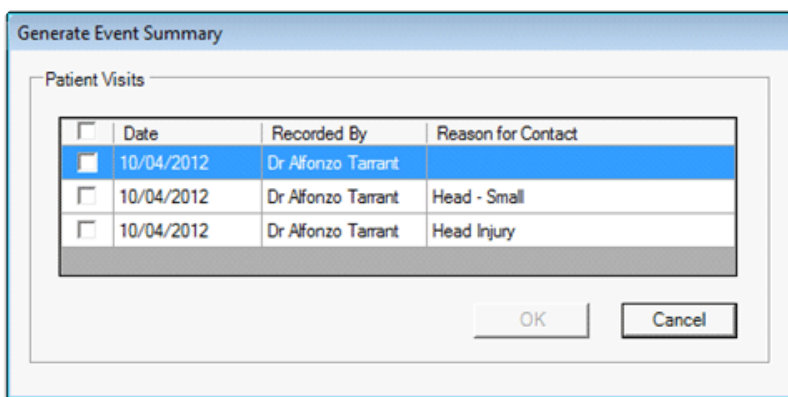


*Note that these templates will auto-populate with patient data, as drawn from the patient's record in MedicalDirector Clinical. Note also that any clinical data (for example Procedures, Problems/Diagnoses, Medical History) is drawn from the Past History tab of the patient's record, **not** the patient's Progress Notes. Similarly, allergy data is drawn from the Allergies section in MedicalDirector Clinical.*

4. A new CDA e-Health document is generated for you to complete. Complete it as desired; record information, and/or remove any lines or sections as you wish. Note that information you add here will *not* be written back to the patient's record.

If you wish to indicate that a document contains sensitive information:

- Where you or your patient feels that particular information is of a sensitive nature, enter the text 'Sensitive Information';
 - Into the 'Reason for Referral' field of an e-Referral.
 - Into the 'Response Narrative' field of a Specialist Letter.
- In an Event Summary, you will be prompted to select the relevant Patient Visits to include.



This concludes the steps necessary for creating a CDA e-Health Document. Continue below for information on the various options for uploading the document to PCEHR.