SECUREEMR+

A Partnership Solution by INMEDIATA *and* prognoCIS

Version No: Denali 3.1

Electronic Health Information Data Export and User Guide

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Purpose

The purpose of this document is to describe SecureEMR+ export data process and the definition of elements in the exported files.
Ref.:

- §170.315(b)(10) Electronic Health Information export
- ONC Compliance Date: Dec 31,2023

Instructions

SEMR+ Workflow

Single Patient Data Export:
A SecureEMR+ user can perform an Electronic Health Information (EHI) export for a single patient at any time the user chooses without developer assistance and can limit a set of users the ability to perform the export.

Patient population EHI Export:

A SecureEMR+ Administrative user can initiate an Electronic Health Information (EHI) export for all/multiple patients with developer assistance and can limit a set of users the ability to perform the export.

The Data Migration Team monitors the progress of the process. The process completion notification is sent to the Inmediata Data Migration Team. The encrypted PHI data is stored on the ASP/Client server.

Data Filles exported:
- Includes EHI that can be stored at the time of certification by the product.
- Are electronic and in a computable format.
- Includes a publicly accessible hyperlink of the export's format.

1. <u>Single Patient Data Export</u>

User with, **CuresEHIExport"** role can export Single Patient EHI any time the user chooses and without subsequent developer assistance to operate.

User Role, **CuresEHIExport** is present under the **Role (No Access Rights)** section of the **User Role** Master screen in SecureEMR+.

The **CuresEHIExport** User Role must be checked for a Provider, Medical Assistant, Office Staff or Clinical Staff user to enable the user to export data for Single Patient on **Export Patient Data** popup without password or any intervention.
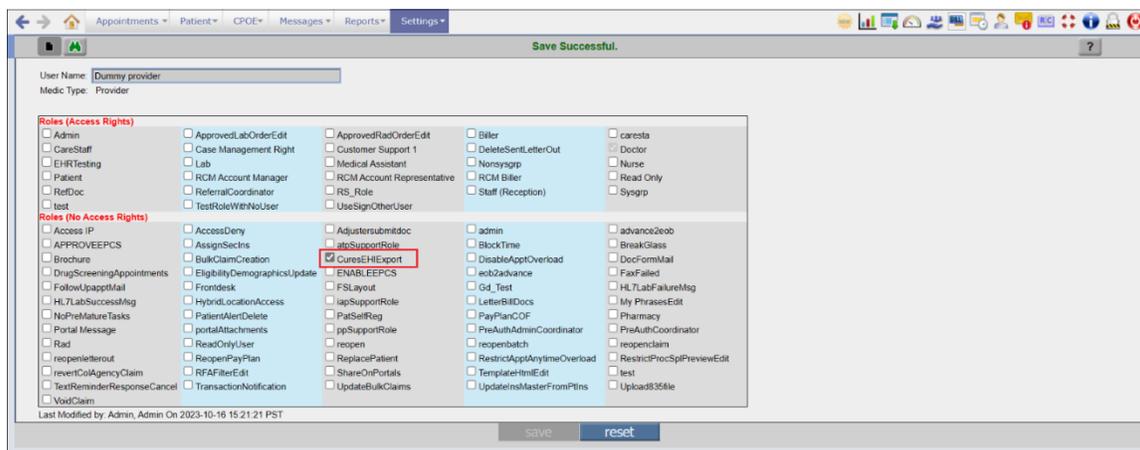
Figure: *CuresEHIExport User Role*

When a user assigned with *CuresEHIExport* User Role logs into SecureEMR+ the *Data Export* link is available, the *Single Patient* radio button is selected by default for such user.

Other enabled options on the popup include:
- Include Deleted Encounters (Use with caution)
- Reason for Data Export
- Check All and other listed checkboxes
- CONFIGURE
- CANCEL
- EXPORT

 Disabled options on the popup include:
- All Patients
- Selected Patients
- Patients of Primary Provider

- Patients of Attending Provider
- Encounters of Attending Provider
- Patient Last name From-Upto
- Data Export for Patient from SQL file
- Encounter Date Range From and Upto
- Data Export Password

Clicking on the *Search* icon invokes **Patients** Search List with Active Patients in SecureEMR+. On selecting a patient from this popup, the name of the patient is shown in the grayed-out text field. A message is displayed beside the *Search* icon of this field all the time. This message reads: *(For All/Multiple Patients Data Export, please contact Inmediata's Support Team)*

Users can select the checkboxes for the Type of Data to be exported and click on the *EXPORT* button. As *Data Export Password* field is disabled for the user with *CuresEHIExport* User Role assigned to them, validation to Enter Password is not shown on click of the *EXPORT* button. Instead, a confirmation message is directly shown in a popup which reads: *The Patient Data Export will be generated in the Background. User will be notified by mail when the report is generated.* Click on the *OK* button to close the confirmation popup.

Download Files:

Single Patient Data is exported under 'Download Files'

Navigate to Settings > Configuration > Clinic column > Download Files

Figure: *Download Files*
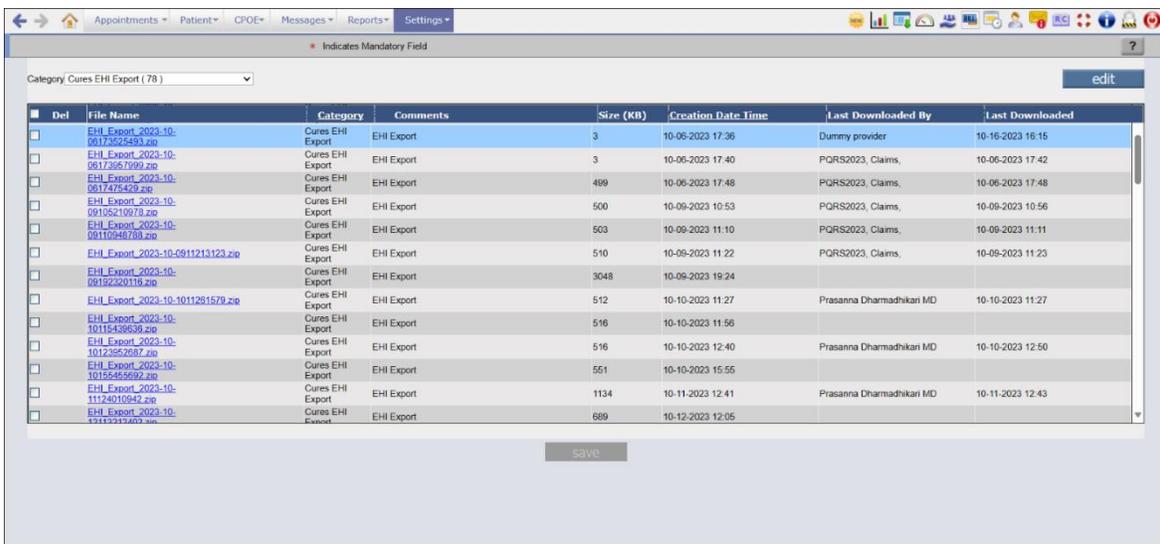
Figure: *File with Cures EHI Export Category on the Download Files screen*

A Category **Cures EHI Export** is present on the **Download Files** master screen on the EMR side. The record for a file downloaded on exporting Single Patients is shown here. Files shown under this Category are in the .zip format. The **Comment** column of the record shows 'EHI Export'. On clicking the file hyperlink, a zip folder is downloaded in user's local **Downloads** folder. The downloaded zip folder contains exported data in .txt, .xls and .pdf formats.

2. All / Multiple Patient Data Export

Patient Population Data Export is handled by the Inmediata Data Migration Team as it depends on size of data, time and efforts required to manage the server resources.

Please contact Inmediata Customer Support Team at **servicioalcliente@inmediata.com** or **techsupport@inmediata.com** to initiate the process.

A Data Export can be completed by exercising the following steps: **Navigate to Settings > Configuration > Medics column > Data Export**

Masters								
Groups	**Clinic**	**Medics**	**Vendors**	**Codes/Drugs**	**Workflow**	**Output Templates**	**Report Design**	**Admin**
Group Types	Locations	Designation	Lab	ICD	Complaints	Progress Notes	Matrix	Role
Ins Types	Holidays	Specialty	Radiology	CPT®	Work Flow Event	Forms	Tabular	User Role
Marital Status	Pref ICD	Providers	Pharmacy	HCPC	Work Flow Definition	Patient Signature	Patient	Audit Trail
Title	Pref Cpt/Hcpc	Resource	Insurance	Drug	Expressions	Preprinted	Encounter	Properties
Illustrations	Pref Drug	Medical Assistant	Employer	Frequency	Guidelines	Letters	Appointment	Import Format
Classification	Pref LAB	Clinical Staff	Items	Stop Reasons	Complaint Event Guideline	Lab Order	Graph	Data Mapping
Family Problems	Pref RAD	Admin Staff	Attorney	Vaccine	Protocols	Lab Result	Patient Forms	Login Details
Family Relations	Enc Types	Ref Doctors	Ins Adjuster	Consults	Diagram Pins	Radiology Order	Doctor Forms	Import Log
Medical History	In-House Drug	Address Book	EDI Codes	PQRS Measures	Order Set	Radiology Result	Meaningful Use	Reminders
Environmental	Pref Family History		Clinic Codes	Custom Appt Status	MU Settings	Prescription		
Food	Education	Doc Loc Regn	Business Unit	OB Master		Encounter		DB Analysis
Surgery	Scheduled Process	Purge Data	EDI Setup			Appointment		Query Analyzer
Phrases Types	Download Files		Patient PayPlans					HL7 PropFiles
Boolean Result Text	Receipts Batch No	Data Export				E-Mail		
	Data Portability					Label		Sync Conf
	Pref Items					Fillable Forms		Diagnostics
Input Elements, Tests and Templates								
Social Hist	**Vitals**	**HPI**	**ROS**	**Physical**	**Specialty**	**Clinic Forms**	**Lab**	**Radiology**
Systems	Systems	Systems	Organ Systems	Organ Systems	Systems	Category	Category	Category
Elements	Vital Signs	Elements	Symptoms	Bullets	Elements	Tests	Tests	Tests
Template	Template	Template	Template	Template	Template	Template	Vendor Tests	Vendor Tests
Sequence	Sequence	Sequence	Sequence	Sequence	Sequence	Sequence	Sequence	Sequence

Figure: *Data Export hyperlink on the Masters screen*

A screen will display with the options to choose from as given below:

Figure: *Export Patient Data popup*

Patient Data Export Types:
User can export the data either for

i. **All Patients** - Data exported for all patients.

ii. **Selected patients** - Data for specific patients can be exported.

iii. **Patients of Primary Doc** - Patients of a particular primary doctor

iv. **Patients of Attending Doc** - Patients with a particular attending doctor

v. **Encounters of Attending Provider** - Patients in an encounter for an attending doctor

vi. **Patient Last name From-Upto** - Patients within a specific range based on their last name.

vii. **Data Export for Patient from SQL file** - Exports data to SQL file format with extension as SQL.

1. **Send Email To:** Notification is sent to the entered email address once export is completed. (Valid single email address is allowed)

2. **Include Deleted Encounters (Use with caution):** User can select this option to include deleted encounters for data export.

3. **Reason for Data Export:** Specify the reason why the data is being exported. This is an alphanumeric field which also supports special characters. The character limit of this field is 50 characters.

4. **Encounter Date Range From/Upto**

   a. The date should be given in the MM-DD-YYYY format. In the case of a one-time data export, normal procedure is to specify the From date as 01-01-2000 and the Upto date as one day before the actual data export is done, or the cut off date decided upon.

5. **Click on specific check box for which user wishes to export data**

   a. Inmediata can check for data for which we require export.

6. **Configure**
   Configure Export Fields popup is used by a SecureEMR+ user to configure the fields and related data that need to be exported. This popup is invoked from the *CONFIGURE* button on the *Export Patient Data* popup.
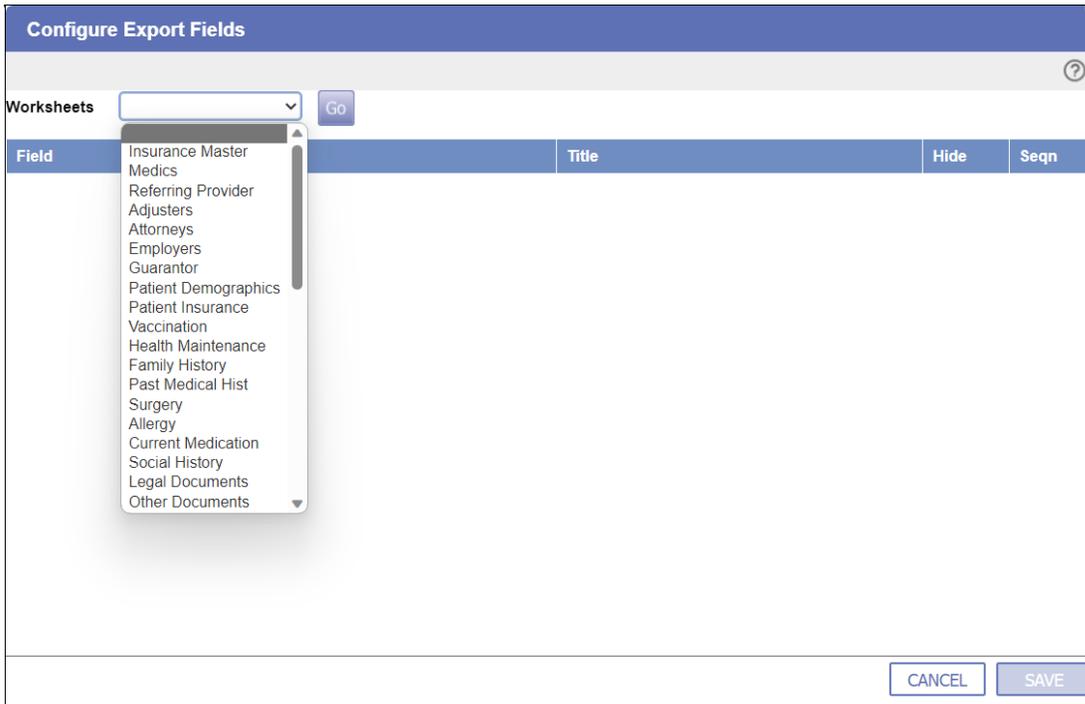
Figure: *Worksheets on Configure Export Fields popup*

Figure: *Configure Export Fields popup*

636 San Patricio Ave., Third Floor, San Juan, PR 00920   Phone: (787) 783-3233
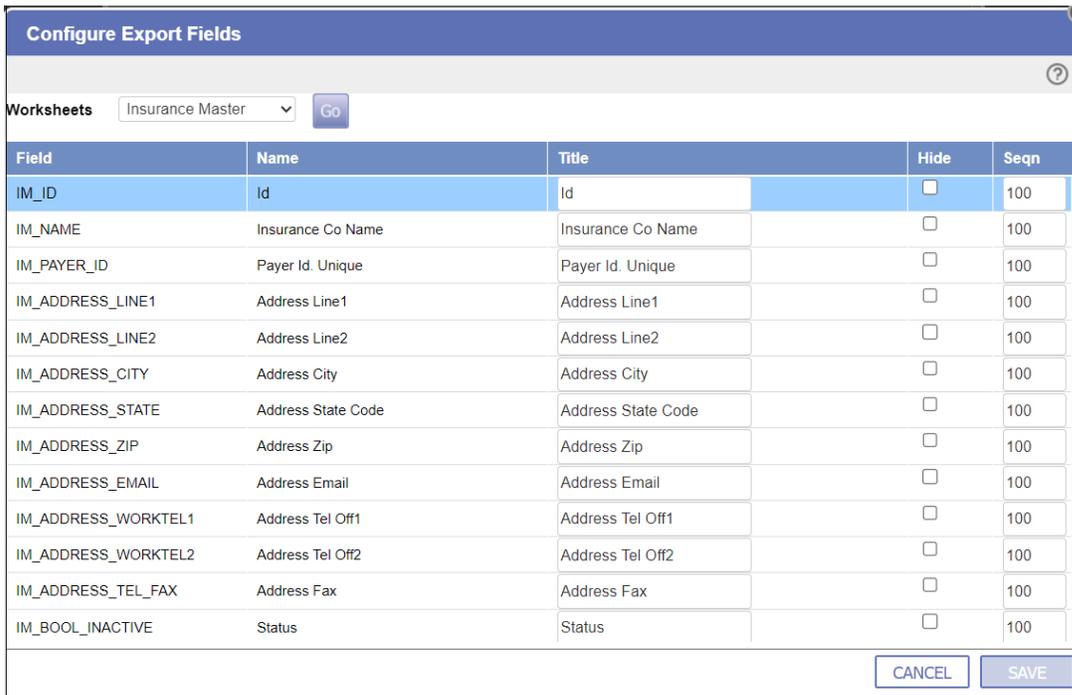
Worksheets: Select an option in this dropdown and click on the *Go* button,

The option present in this dropdown list include -

- Insurance Master
- Medics
- Referring Provider
- Adjusters
- Attorneys
- Employers
- Guarantor
- Patient Demographics
- Patient Insurance
- Vaccination
- Health Maintenance
- Family History
- Past Medical Hist
- Surgery
- Allergy
- Current Medication
- Social History
- Legal Documents
- Other Documents
- Enc Attach Docs
- Old Progress Notes

- Messages
- Future Appointments
- Vitals
- Diagnosis Codes
- CPT Codes
- HCPC Codes
- CCD
- Prescriptions
- Lab Results
- Rad Results
- Procedure Orders
- Consults
- Enc Progress Notes
- Procedure Notes
- Letters
- All Vitals
- Lab Test Result Values
- Patient Cases
- Patient Notes
- Patient Alert
- Past Appointments

When Billing is turned on for the clinic then the following options are also shown -

- Billing Ledger
- Billing Claims
- Billing Charges
- Patient Advance
- Statements

Field: This column shows the fields present for a selected Worksheet.

Name: This column shows the names of the fields.

Title: Enter the changed names of the fields that must be displayed.

Hide: Check this checkbox to hide a certain field and prevent it from being exported.

Seqn: Define the sequence number of a field. By default, the Seqn number is set to 100.

SAVE button: Click on the *SAVE* button to save the changes on the *Configure Export Fields* popup.

CANCEL button: Click on the *CANCEL* button to close the *Configure Export Fields* popup.

7. When a user without *CuresEHIExport* User Role assigned to them (Admin) logs into SecureEMR+ and navigates to the *Data Export* link, the *All Patients* radio button is selected by default for such user. All options are enabled for this user.

8. The user can select the checkboxes for the Type of Data to be exported and click on the *EXPORT* button. Password must be entered in the *Data Export Password* field otherwise a validation "Enter Password" is shown when the *EXPORT* button is clicked.

9. **Enter Data Export Password**
   Type in the password. Click on the *EXPORT* button.

Figure: *Check All checkbox checked on the Export Patient Data popup*

The user will receive a message saying ***The Patient Data Export will be generated in Background. User will be notified on mail when the report is generated***.
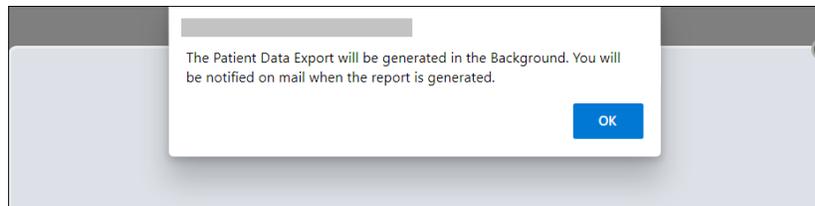
Figure: *Message displayed when Patient Data Export is being generated*

Once user clicks on **OK**, a folder gets created in data files named **export data**.

The contents within **export data** file look like the following:

Name	Size	Type	Date Modified ▼
PatFromUptoA-D_ATTACH_DOC	190 KB	XLS File	10/5/2015 11:43 PM
PatFromUptoA-D_OTHER_DOCS	3,425 KB	XLS File	10/5/2015 11:37 PM
PatFromUptoA-D_LEGAL_DOCS	804 KB	XLS File	10/5/2015 11:29 PM
PatFromUptoA-D_MESSAGES	2,373 KB	XLS File	10/5/2015 11:26 PM
PatFromUptoA-D_LETTERS	93 KB	XLS File	10/5/2015 11:25 PM
PatFromUptoA-D_PAT_INSUR...	612 KB	XLS File	10/5/2015 11:17 PM
PatFromUptoA-D_PAT_PHOTO	179 KB	XLS File	10/5/2015 11:17 PM
PatFromUptoA-D_PAT_DEMO...	907 KB	XLS File	10/5/2015 11:17 PM
PatFromUptoA-D_REFERING_...	179 KB	XLS File	10/5/2015 11:17 PM
PatFromUptoA-D_INSURANCE	66 KB	XLS File	10/5/2015 11:17 PM
ExportInProcess	1 KB	Text Document	10/5/2015 11:17 PM
APC02734		File Folder	10/6/2015 12:38 AM
APC00058		File Folder	10/6/2015 12:38 AM
APC03913		File Folder	10/6/2015 12:34 AM
APC02206		File Folder	10/6/2015 12:34 AM
APC01610		File Folder	10/6/2015 12:34 AM
APC00276		File Folder	10/6/2015 12:34 AM
APC02933		File Folder	10/6/2015 12:32 AM
APC04065		File Folder	10/6/2015 12:32 AM
APC03823		File Folder	10/6/2015 12:32 AM
APC03640		File Folder	10/6/2015 12:32 AM
APC03525		File Folder	10/6/2015 12:32 AM
APC02830		File Folder	10/6/2015 12:32 AM
APC02078		File Folder	10/6/2015 12:32 AM
APC03397		File Folder	10/6/2015 12:32 AM
APC03057		File Folder	10/6/2015 12:32 AM
APC03029		File Folder	10/6/2015 12:32 AM
APC02453		File Folder	10/6/2015 12:32 AM

- **For PHI without any documents attached**, data is exported in .xls and .txt format.

  o For example, for Allergy:
    Exported field list is - Last name, First name, Middle name, Chart no, Account no, Birth date, Allergy, Reaction, Type, Int Name, Status, Rxnorm

- **For PHI with documents attached**, for example Lab Results, Rad Results, Old Progress Notes, Results, Letters, etc. the .xls contains a specific column labeled "File" which contains the path of the respective document.
  For example, for Letters:

    Exported field list is - Last name, First name, Middle name, Chart no, Account no, Birth date, Letter Date, Outward (O) Inward (I), To Name, Subject, List of To Names, List of Cc Names, List of To and Cc Names, Status Code, Status Name, **FILE**

    For ex. CHART01/LETOut_99.pdf CHART01/LETIn_389.pdf

Here, **CHART01** is the folder and the **LETOut_99** and **LETIn_389** corresponds to the physical file stored under the Folder **CHART01**.

- **CCD Export:** This includes Consolidated Cures CCD and data element .xls includes column **HTML**, **XML** which contains path of that document.

  Exported field list is - - Last name, First name, Middle name, Chart no, Account no, Birth date, DOC_ID, Date, Provider, **HTML**, **XML.**

. <u>Audit Trail</u>

Single Patient Data Export Audit Trail:

To view the Audit Trail Report of Data Exported for Single Patient:

- User can navigate to the ***Audit Trail Report*** popup.
- Select the Action as 'Export/Download'.
- Specify the Date From and Upto range
- Click on the ***ok*** button.

Figure: *Audit Trail Report for Single Patient*

The Audit Trail Report with following information can be captured:

All/Multiple Patient Data Export Audit Trail:

To view the Audit Trail Report of Data Exported for All Patients or Selected Patients,

- User can navigate to the *Audit Trail Report* popup.
- Select Menu Option as *Export Data*.
- Select the Action as *Approve*.
- Specify the Date From and Upto range
- Click on the *ok* button.

Figure: *Audit Trail Report for Selected Patients or All Patients*

Important notes:

Once the download is complete, security of the PHI contained in downloaded files is the responsibility of the user. Inmediata accepts no liability after the data leaves Inmediata servers.