SECURE EMR

Version No: 5

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:
SecureEMR users can perform an electronic health information (EHI) export for a single patient at any time the user chooses without developer assistance. Permission to perform the export can be limited to a set of users.

Patient population EHI Export:

A SecureEMR user with permission to access Data Export Module can initiate an electronic health information (EHI) export for All Patients/Complete Clinic, with developer assistance. The Data Migration Team monitors the progress of the process.

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

1. Single Patient Data Export

Users can export Single Patient EHI any time the user chooses and without subsequent developer assistance to operate.

The **Export Patient Data** permission can be adjusted by selecting **Admin Pages** > **Module Permissions** from the top menu. Once in the permissions screen, select the desired user from the list, and click the checkbox for *Enabled* under the **Export Patient Data** option.
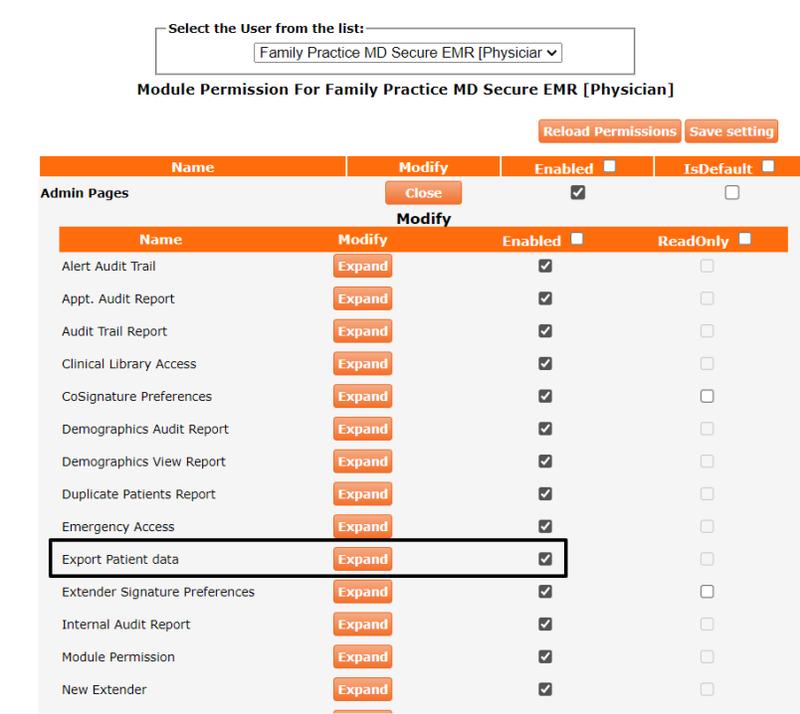

Figure: *Export Patient Data permissions*

When a user who has **Export Patient Data** permissions logs into SecureEMR clicks on **Admin Pages** at top menu, the option **Export Patient Data** is present in the collapsible menu.

Figure: *Admin Pages*

To export data for single patient, complete the following steps:

1. Chage radio button to **Select Patient**.

2. In the **Last Name, First Name** field, input the patient name in that format.

3. Click **Submit** button. A message will be displayed: Data export file will start shortly, please press **Refresh** button to update status.

4. Once the status changes to **Complete** you are ready to press **Download** button to start downloading the file to your PC.

Downloaded files will be in a .zip file format.

2. All Patients/Complete Clinic Patient Data Export

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

The user initiates the request at Patient Data Export module. The Data Export can be initiated by following the steps below:

1. Navigate to **Admin Pages** > **Export Patient Data**

2. Select the **All Patients** radio button (default setting)

3. In the **Visit Selection** section, select a radio button for the visit range. Choose between **All Visits** or a **Date range**. If you select the Date Range, input a From and To date to define the date range.

4. When exporting all patients in a practice, if the number of patients with signed visits is less than 1,000 then the export will be scheduled to be executed overnight, please check the status again the next morning by clicking **Refresh** button.

5. If there are more than 1,000 patients with signed visits, the export will be placed on hold and an Inmediata representative will contact the practice owner to confirm before the export is scheduled.

6. When **All Patients** and **Date Range** combination is selected the data export will be in **Not Started** status and will be scheduled for next day.

7. Please contact Inmediata Customer Support Team at **servicioalcliente@inmediata.com** or **techsupport@inmediata.com** for any assistance.

Figure: *All patients> All visits*

636 San Patricio Ave., Third Floor, San Juan, PR 00920   Phone: (787) 783-3233

Figure: *All patients> Date Range*

The contents of the downloaded .zip (compressed) file will have the following files/structure:

1. "Readme.pdf": this user guide

2. A folder for each patient exported with the patient's name and the MRN separated by dashes, like this: "Juan-Pueblo-12345"

Each patient folder will have the following:

1. HealthRecordCCD.xml - this is patient record in CCD format

2. CCD.xsl - this is the stylesheet needed to open a CCD file

3. Attachments folders for each document type associated with each patient, for example, if the patient has completed office forms, then a folder called "OfficeForms" will be included with PDF documents assigned to that patient.

Figure: *All patients> Downloaded files*

Disclaimers:

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.