Exporting Patient Information

 Warning: Be careful and protect the exported data the same as you protect all your patient info.

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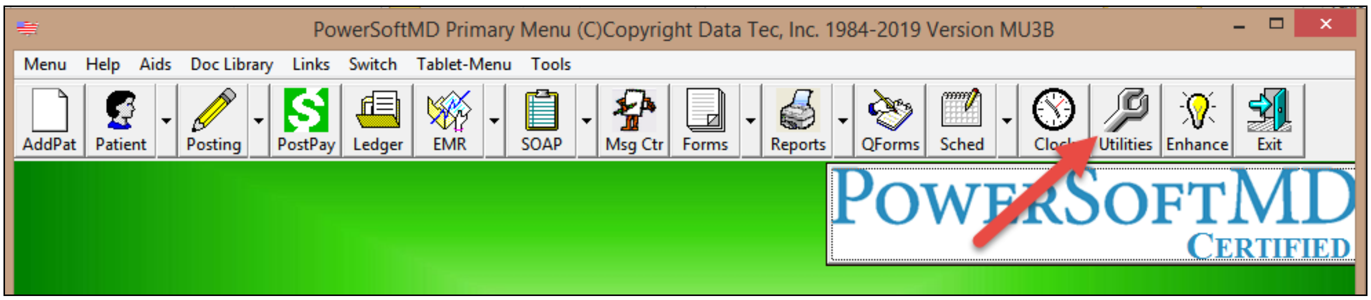
Authorizing Users

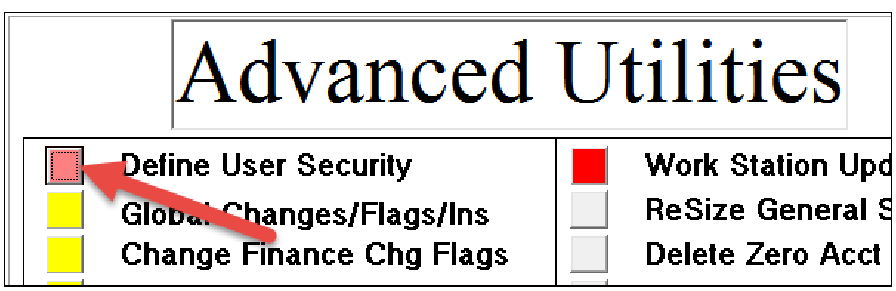
Only authorized users may export patient information in different forms. The first step it to give a user the security level necessary to export patient information.

1) From the Primary Menu select the **Utility Menu**.



2) From the Utility Menu select the **Advanced Utilities**.

3) Next select **Define User Security**.



4) On the User Security Definition screen click the **List Active Users** button and select the desired User ID.

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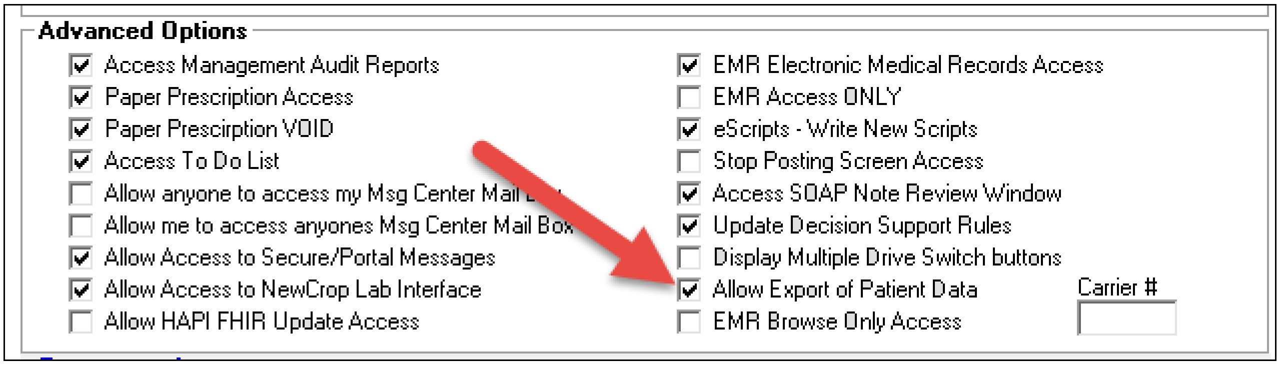
5) Check the all the options that you want the user to have access to and be sure to include checking the **Allow Export of Patient Data** option.



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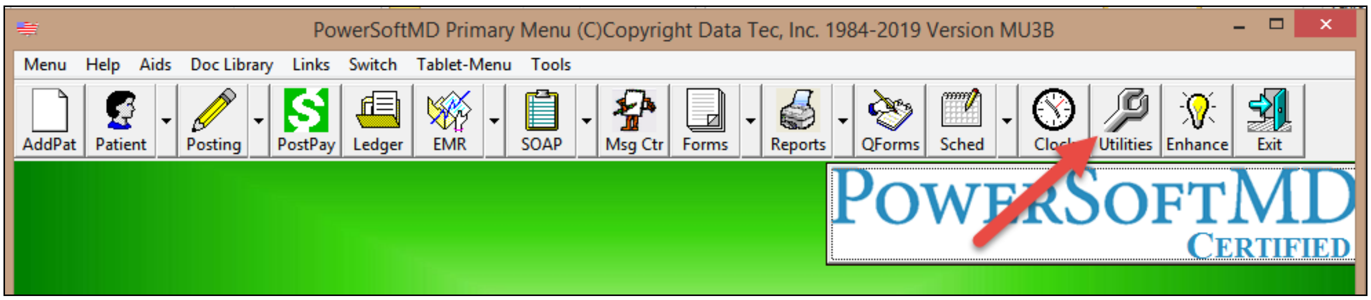
Exporting Patient Basics

Authorized users can export patient demographics, financial ledgers, and even schedules into common ASCII Text files. They are in the CSV type files that can be opened with Excel or used as import information.

1) From the Primary Menu select the **Utility Menu**.



2) From the Utility Menu select the **Advanced Utilities**.

3) For each type of patient information (Demographics, Ledgers, Schedules) click the corresponding button.

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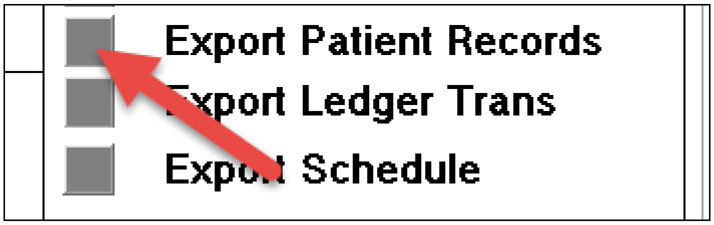
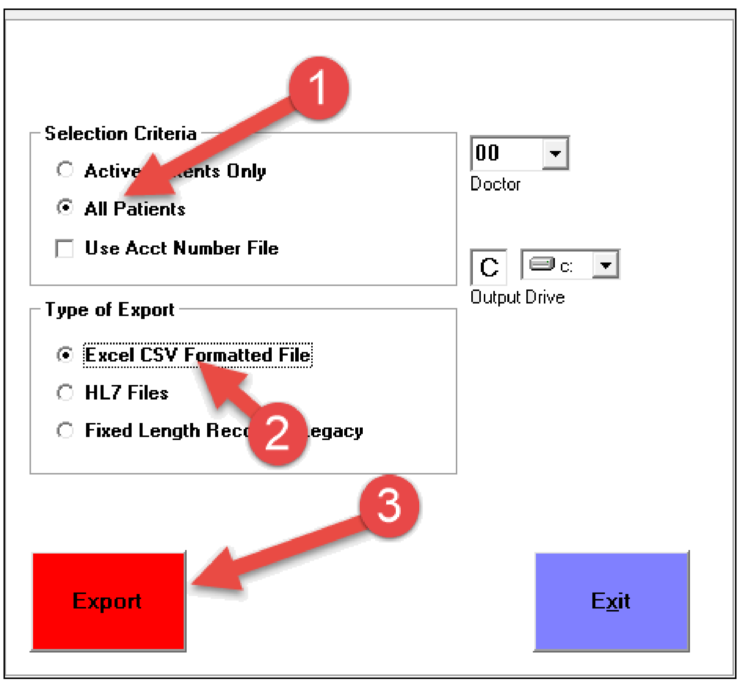
Exporting Demographics

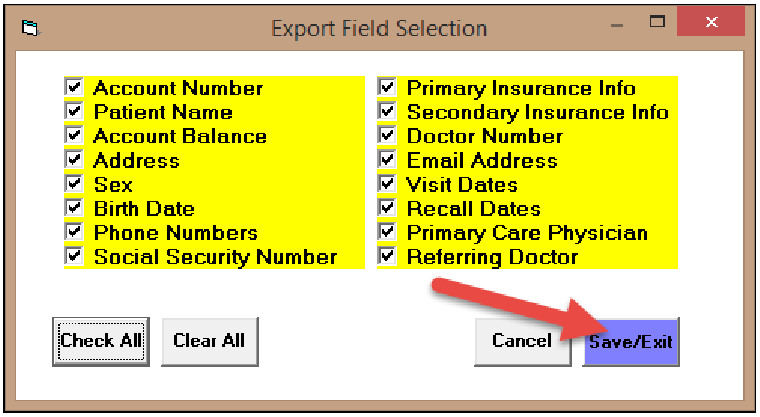
1) When you click **Export Patient Records** button:



- select **All Patients**
- select **Excel CSV Formatted File**
- select Doctor **00**
- select you **Output Drive** Letter
- Click the Red **Export** button

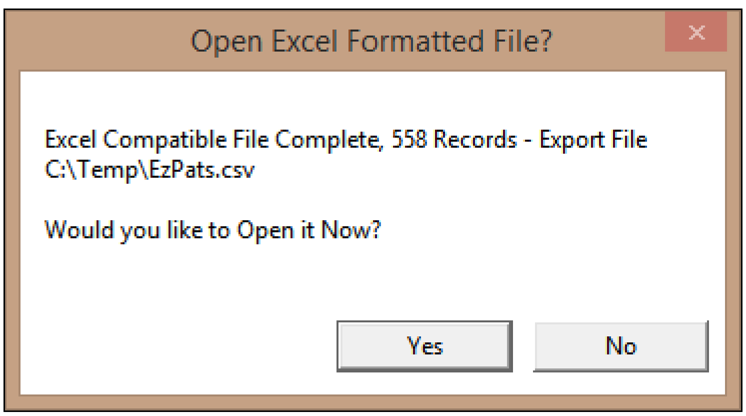


2) Next you will be prompted to select what components of demographics you wish to export; you can use the **Check All** button. Then click the **Save/Exit** button.



3) When prompted if you wish export the data now, reply **Yes**.

4) After the export file is created the **file name and location** will be displayed, in addition you will be given a prompt to open the file if you want to.



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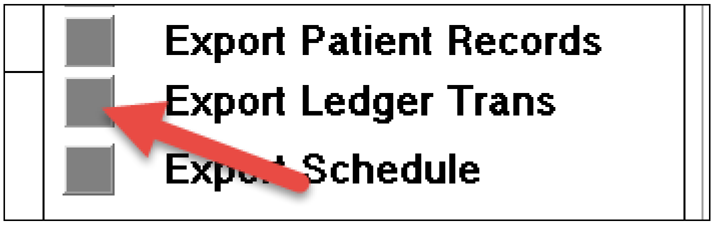
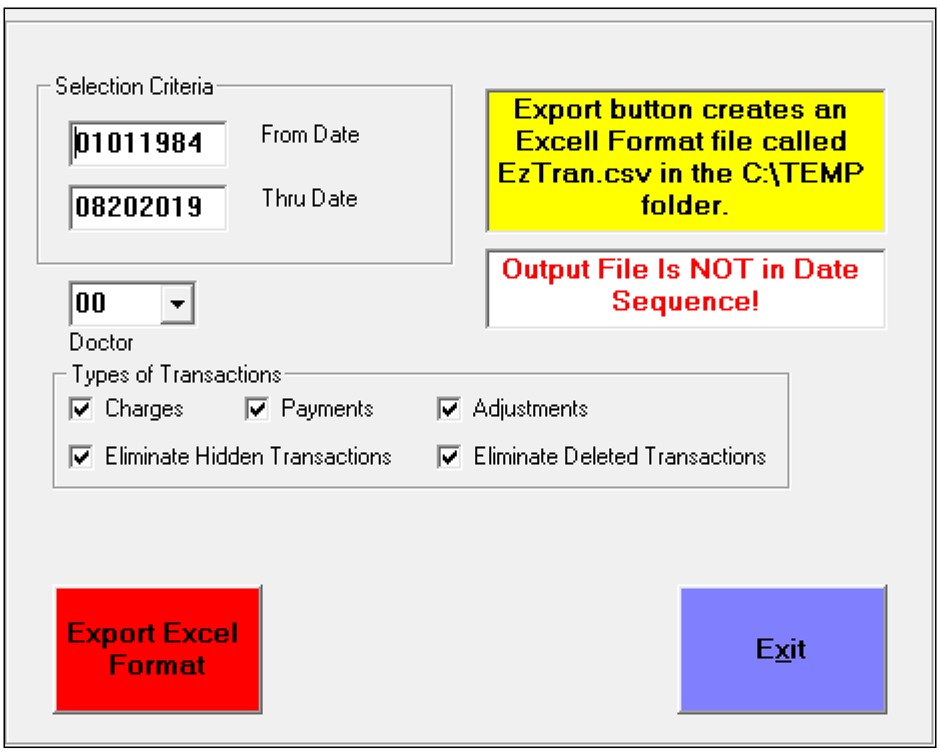
Exporting Ledgers

1) When you click **Export Ledger Trans** button:



2) Set the Date Range to **all possible dates**, set the Doctor to **00** and check all the check marks, then Click the **Export Excel Format** button.



3) Follow the On Screen prompts; you will receive a prompt telling you the output file will be **C:\Temp\EzTran.csv**, then another prompt asking you if you wish to open the file.
Note: The output will not be in date sequence.

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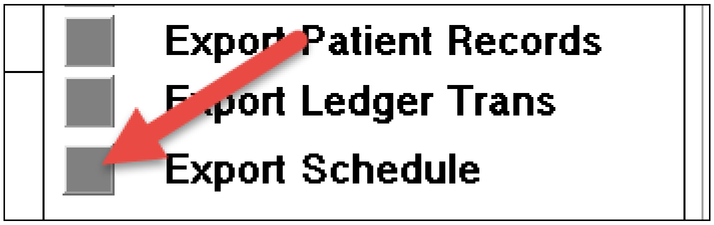
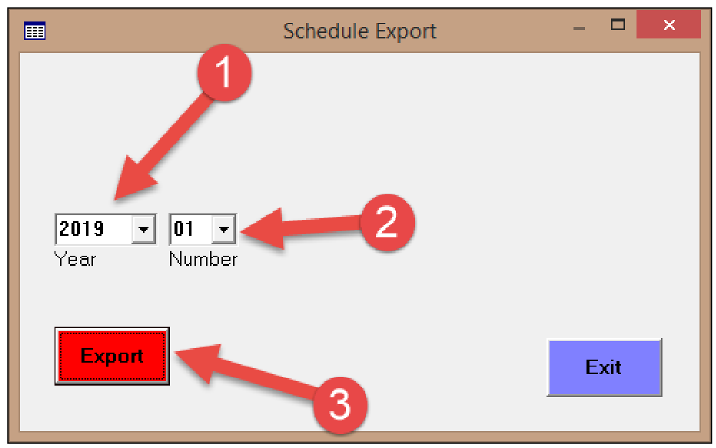
Exporting Schedules

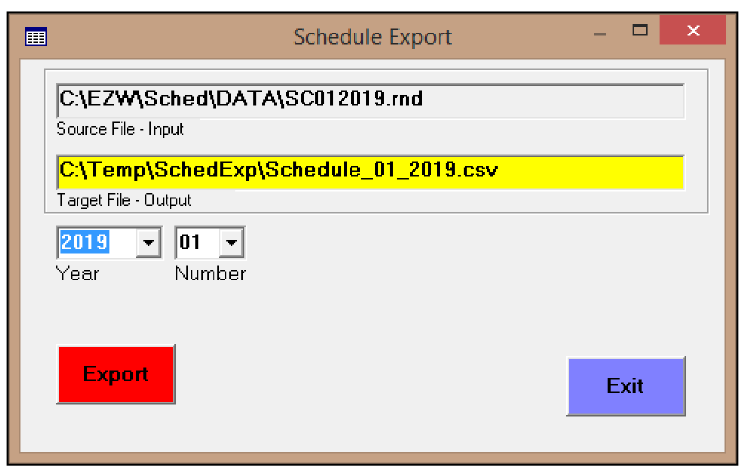
1) When you click **Export Schedule** button:



2) Select the **Year** you with to export, select the schedule **number**, then click the Red **Export** button.



3) After each schedule export you will see a on the screen the name and location of the exported **CSV** file.



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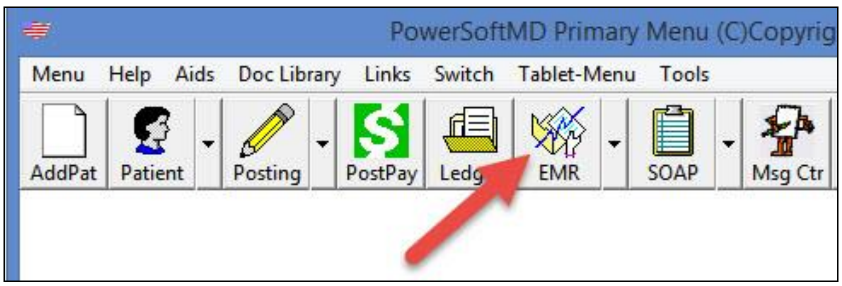
Export Visit Notes & Clinical Info

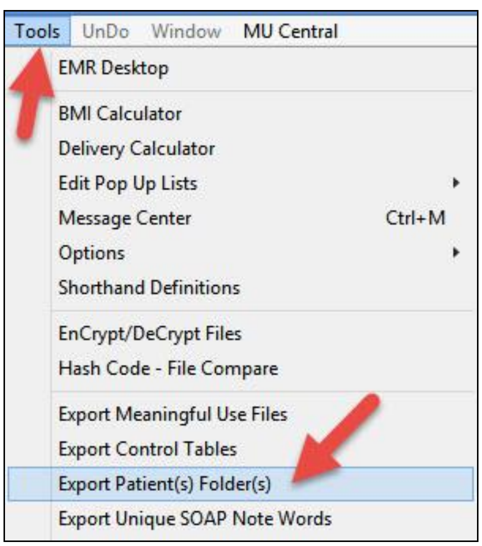
PowerSoftMD has a built in EMR Export for your patient data that will create a folder containing all your patient charts that can be opened with Windows without using PowerSoftMD.

1) Connect an External Drive such as a USB Hard Drive and note its Drive Letter. A folder will be created on the External Drive's Root Directory of the name of your Practice. After this process is complete you could copy that entire folder back over to any office computer you want.

2) Open the EMR Desktop (**do not** select a patient)



3) Select the top toolbar "Tools" option then "Export Patient(s) Folders(s)"



4) Reply "Yes" when prompted

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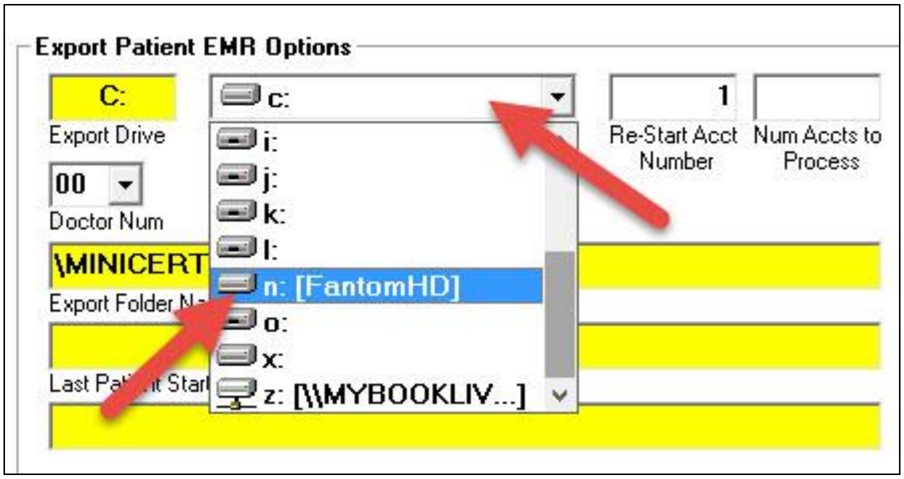
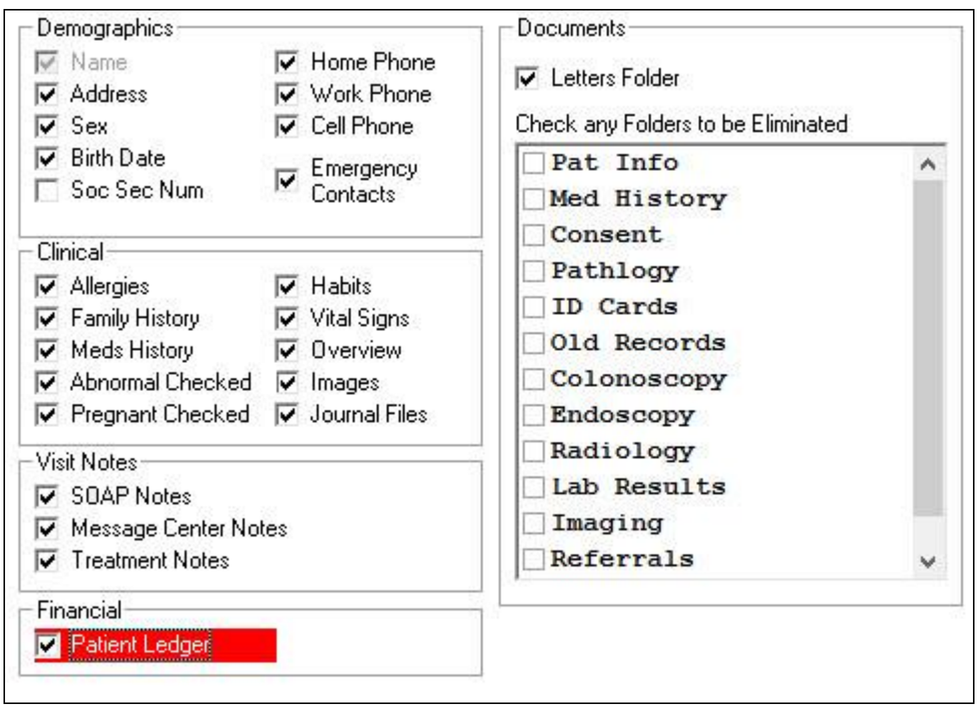
5) Select your External Drive Letter using the drop down list



6) Review and **check all the options** carefully.
If you want the patient's ledger History be sure to check "**Patient Ledger**" under Financial.
The Documents folder List allows you to check Folders you **DON'T** want exported



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8) Be sure to set the Doctor Number to "00".

9) If you don't fill in the "Num of Accts to Process" field, it will default to All patients.

We highly recommend exporting them in groups of 1000 patients at a time. For example if your highest account number was 3434, you could export with field values of:

Re-Start Acct Number: 1 Num Accts to Process: 1000
Re-Start Acct Number: 1001 Num Accts to Process: 1000
Re-Start Acct Number: 2001 Num Accts to Process: 1000
Re-Start Acct Number: 3001 Num Accts to Process: 1000

10) Click the Red "**Export**" button, and repeat this step for each range of account numbers you specify in step 9 above. **Note**: depending on the amount of Patients this could take multiple days to complete, that's why we recommend in doing the patients in batches of 1000 at a time.

11) Remember, once you are 100% done with all patients you could copy the folder named with your practice name back to any office computer you wish.

12) All the files created should be able to be opened using Windows, PowerSoftMD will not be needed to access them.

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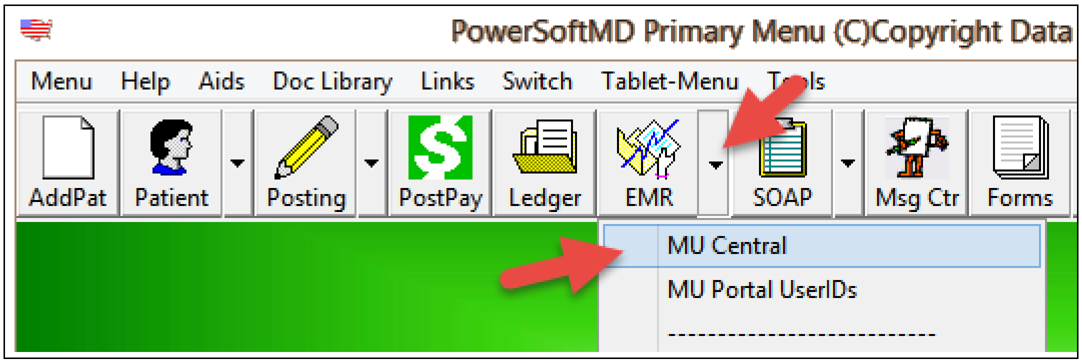
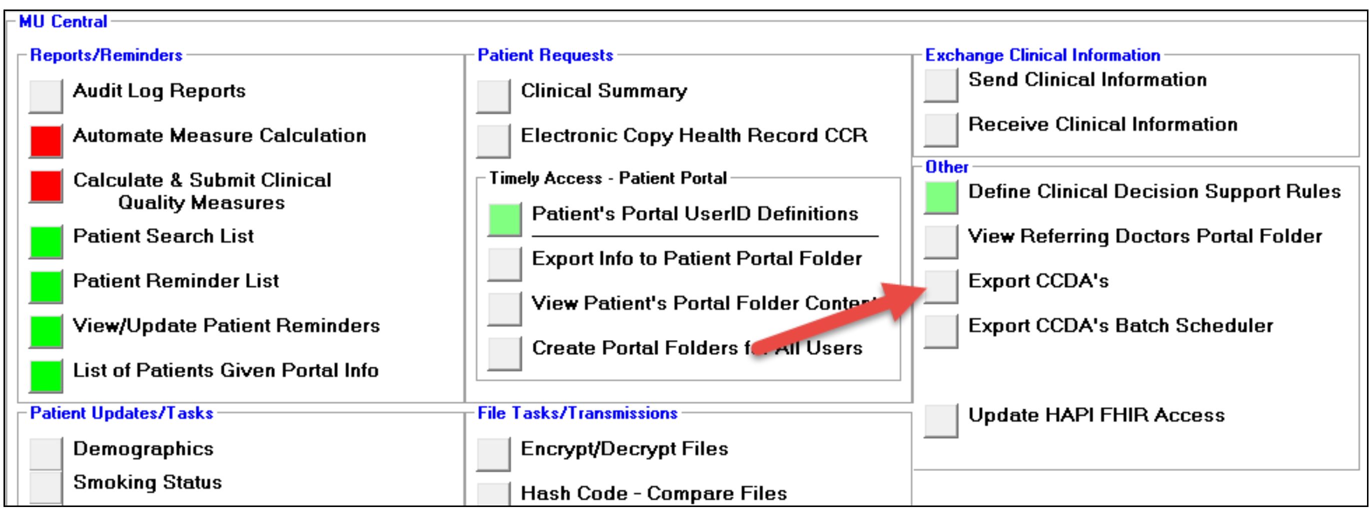
Export CCDA's (Meaningful Use Users)

Meaningful Use software users can create a CCDA xml file for each patient with signed SOAP notes.

1) From the **Primary Menu** select the **EMR Drop Down Arrow** and then **MU Central**.



2) On the MU Central Menu, select **Export CCDA's**



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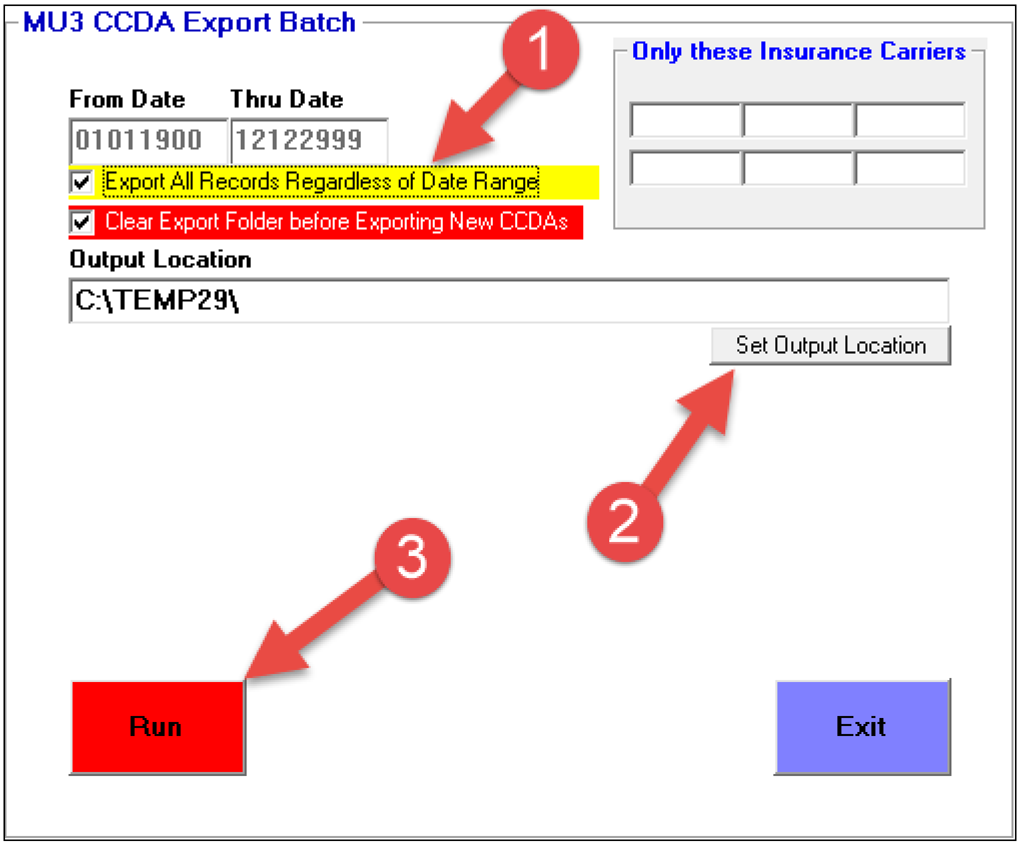
3) Check both check boxes, use **Set Output Location** to change the output folder location, then click the Red **Run** button.

Note: depending on the amount of Patients this could take multiple days to complete.



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