

### Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**

# Exporting the Event Chronology via CDA (Cloud Clients)

Last Modified on 04/14/2020 10:53 am EDT

Version 14.19



**Note:** This documentation applies to the OP Cloud environment.

Rather than print a patient's medical records (formerly Event Chronology) or save it on the cloud, you may wish to export the records to your local drive using the CDA function. A CDA file is a direct transmission of the medical records to a provider in your Address Book who has agreed to accept records in this format and is setup for direct messaging. During the CDA transmission process you will be prompted to send the record or save the record. In the OP Cloud environment, saving the CDA record can export the record to your local drive. Please follow all HIPAA recommendations and regulations when performing this process.

To export records via CDA from the cloud environment:

1. Create a folder on your local drive where you would like to save your Event Chronology CDA file.
2. Click the **Medical Records** button located in the Clinical tab.
3. Click **OK** in the warning message.
4. Select the Reports Criteria dropdown to select your desired report criteria.
5. Select the patient whose records you need to export.
6. In the Reports Dates field, enter the Report Date Range, choose the Latest date range (in months), or select all dates.
7. Click the **Search** button. The Grid View tab of the Event Chronology window will populate with the patient's reports based on the selections you made.
8. In the Grid View tab, select the checkbox next to the records that you would like to export. If you are selecting a Well Visit or Encounter record, you will only be able to select one record at a time.
9. Click the **CDA** button. A Confirm dialog box is displayed asking if you want to Save or Send the record.
10. Click the **Save** button.

11. In the Browse for Folder Window, select the location where you want to save the file:
  - a. Navigate to the **Network** drive.
  - b. Double-click **tsclient**.
  - c. Double-click the **\\tsclient\C Share** or your local folder.
  - d. Navigate to the folder you created in step 1.
  - e. Click the **OK** button.



**Note:** If you plan to export multiple records, it is recommended that you drag and drop the directory into the left panel for it to be remembered for future access. Otherwise you will need to repeat step 11 for every export.

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12. When completed, a confirmation message with the file name will appear on the screen.
13. Repeat the previous steps as necessary.

Version 14.10



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Rather than print a patient's Event Chronology or save it on the cloud, you may wish to export the records to your local drive using the CDA function. A CDA file is a direct transmission of the medical records to a provider in your Address Book who has agreed to accept records in this format and is setup for direct messaging. During the CDA transmission process you will be prompted to send the record or save the record. In the OP Cloud environment, saving the CDA record can export the record to your local drive. Please follow all HIPAA recommendations and regulations when performing this process.

To export records via CDA from the cloud environment:

1. Create a folder on your local drive where you would like to save your Event Chronology CDA file.
2. Click **Chron** on the Smart Toolbar (or press F8 on your keyboard).
3. Click **OK** in the warning message.
4. Select the Reports Criteria dropdown to select your desired report criteria.
5. Select the patient whose records you need to export.
6. In the Reports Dates field, enter the Report Date Range, choose the Latest date range (in

- months), or select all dates.
7. Click the **Search** button. The Grid View tab of the Event Chronology window will populate with the patient's reports based on the selections you made.
  8. In the Grid View tab, select the checkbox next to the records that you would like to export. If you are selecting a Well Visit or Encounter record, you will only be able to select one record at a time.
  9. Click the **CDA** button.
  10. A Confirm dialog box will appear asking if you want to Save or Send the record. Click the **Save** button.
  11. In the Browse for Folder Window, select the location where you want to save the file:
    - a. Navigate to the **Network** drive.
    - b. Double-click **tsclient**.
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    - d. Navigate to the folder you created in step 1.
    - e. Click the **OK** button.

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