

# Recurring CDA Export

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Version 20.16

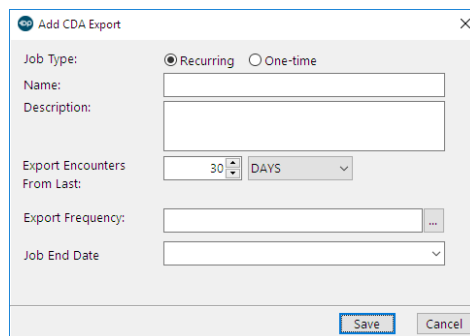
## About

Recurring CDAs can be created and exported on a consistent, recurring basis for a group of patients from the CDA Export window.

In order to create a CDA, the logged-in user must be added as a user to the OP Patient Portal, powered by IntelliChart. Additionally, the logged-in user must have the user permission **Admin\_CDA\_Export\_Batch**. While the CDA Export job is running, the user will continue to have the ability to navigate OP as usual, because the export job will run in the background. Additionally, in order to enter the **S3 (Amazon Cloud Storage)** destination for the CDA Export to be saved, the user must contact OP Support by emailing [support@officepracticum.com](mailto:support@officepracticum.com) to obtain more information and enable this feature.

## Create a Recurring CDA Export

1. Navigate to the CDA Export window: **Admin tab > CDA Export**. The CDA Export window is displayed.
2. Click the **New** button to create a new job. The **Add CDA Export** window is displayed.

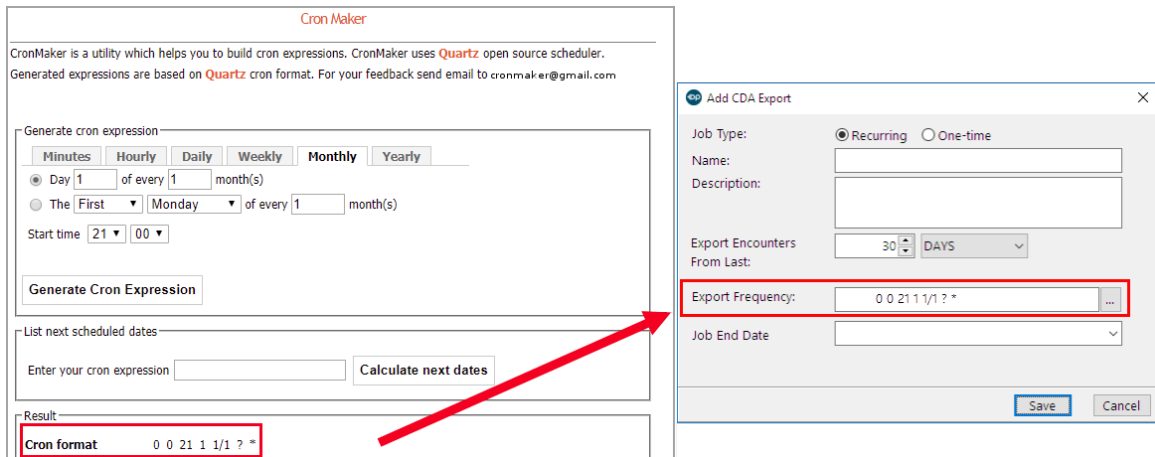


3. Complete the following fields:

- **Job Type:** Select the **Recurring** radio button, if not already selected.
- **Name:** Enter a name for the report.
- **Description:** Enter a description for the report.
- **Export Encounters From Last:** Set the number field and interval field applicably. Example: 30 Days would mean that a CDA would generate and export for any Encounters or Well Visits that were performed in the previous 30 days.

4. Complete the **Export Frequency** field:

- a. Click the **ellipsis** button **...** to launch CronMaker in a web browser. CronMaker is a utility that helps a user build a cron expression used to populate the frequency.
- b. In the CronMaker, select the desired intervals of when the CDA Export job should run. Example: Day 1 of every 1 month with a start time of 21:00 would mean that the export will run on the 1st day of each month at 9:00 PM.
- c. Click the **Generate Cron Expression** button. The Cron Expression will display in the Cron format field and must be copied and pasted into the Export Frequency field in OP.



5. Complete the **Job End Date** field by selecting the end date of when the Recurring Job should stop running. This date can be no more than one year from the current date.
6. Click the **Save** button.

The CDA data export will run at the scheduled time and will include all patients that had an Encounter or Well Visit between the start and end date of the report. The content within the CDA will pertain specifically to that Encounter or Well Visit. To view the status of the Export, navigate to the CDA Export window: **Admin tab > CDA Export > Recurring tab**.

Version 20.15

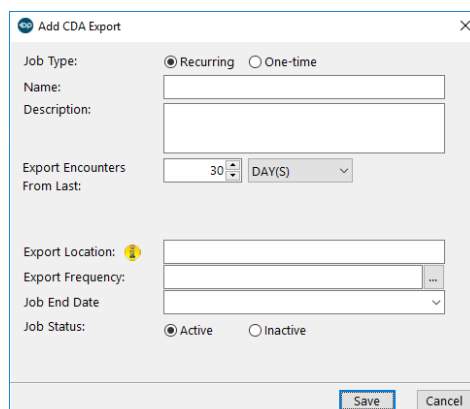
## About

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In order to create a CDA, the logged-in user must be added as a user to the OP Patient Portal, powered by IntelliChart. Additionally, the logged-in user must have the user permission **Admin\_CDA\_Export\_Batch**. While the CDA Export job is running, the user will continue to have the ability to navigate OP as usual, because the export job will run in the background. Additionally, in order to enter the **S3 (Amazon Cloud Storage)** destination for the CDA Export to be saved, the user must contact OP Support by emailing [support@officepracticum.com](mailto:support@officepracticum.com) to obtain more information and enable this feature.

## Create a Recurring CDA Export


1. Navigate to the CDA Export window: **Admin tab > CDA Export**. The CDA Export window opens.
2. Click the **New** button to create a new job. The **Add CDA Export** window is displayed.

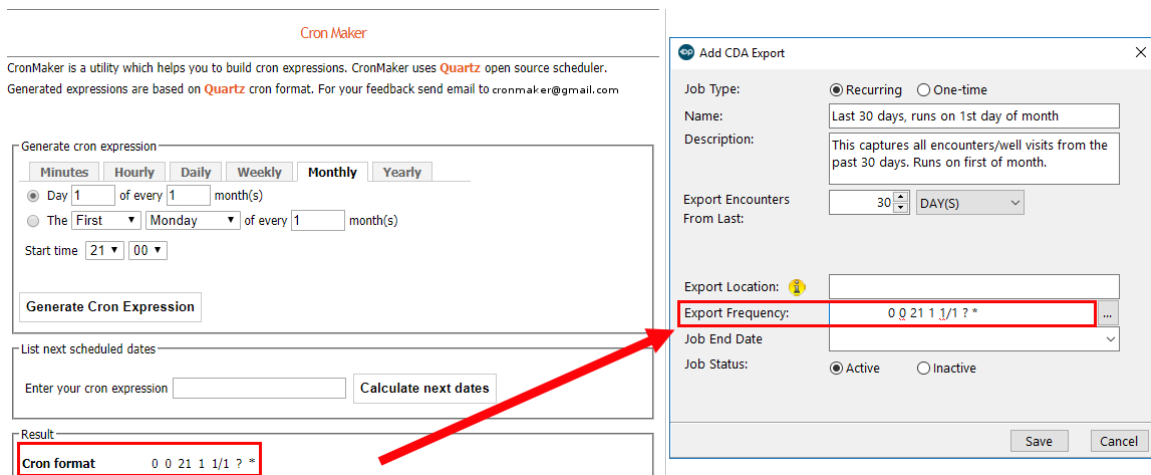


3. Complete the following fields:

- **Job Type:** Select the **Recurring** radio button.
- **Name:** Provide a name for the report.
- **Description:** Provide a description for the report.
- **Export Encounters From Last:** Set the number field and interval field applicably. (Example: 30 Days would mean that a CDA would generate and export for any encounters or well visits that were performed from the previous 30 days).
- **Export Location:** Enter the S3 destination of the export job. See the Overview section above for more information.

4. Complete the Export Frequency field:

- Click on the **ellipsis** button  to launch CronMaker in a web browser. CronMaker is a utility which helps a user build a cron expression.
- In the CronMaker, select the desired intervals of when the CDA Export job should run. (Example: Day 1 of every 1 month with a start time of 21:00 would mean that the export will run on the 1st day of each month at 9:00 pm.)
- Click the **Generate Cron Expression** button. The Cron Expression will display in the Cron format field and must be copied and pasted into the Export Frequency field in OP.



The image shows two screenshots. On the left is the CronMaker website interface. It has a 'Generate cron expression' section with tabs for Minutes, Hourly, Daily, Weekly, Monthly, and Yearly. The 'Monthly' tab is selected. Under it, 'Day 1 of every 1 month(s)' is chosen. The start time is set to 21:00. A 'Generate Cron Expression' button is visible. Below that, a 'Result' section shows the 'Cron format' as '0 0 21 1 1/1 ? \*'. On the right is the 'Add CDA Export' dialog box. It has fields for Job Type (Recurring selected), Name ('Last 30 days, runs on 1st day of month'), Description ('This captures all encounters/well visits from the past 30 days. Runs on first of month.'), Export Encounters From Last (30 DAY(S)), Export Location (with a warning icon), Export Frequency (0 0 21 1 1/1 ? \*), Job End Date, and Job Status (Active selected). A red arrow points from the CronMaker result field to the Export Frequency field in the dialog box.

5. Complete the following fields:

- **Job End Date:** Select the end date of when the recurring job should stop running. This date can be no more than one year from the current date.
- **Job Status:** Set the job status as Active.

6. Click the **Save** button.

The CDA data export will run at the scheduled time, and will include all patients that had an Encounter or Well Visit between the start and end date of the report. The content within the CDA will pertain specifically to that Encounter or Well Visit.