One-Time CDA Export

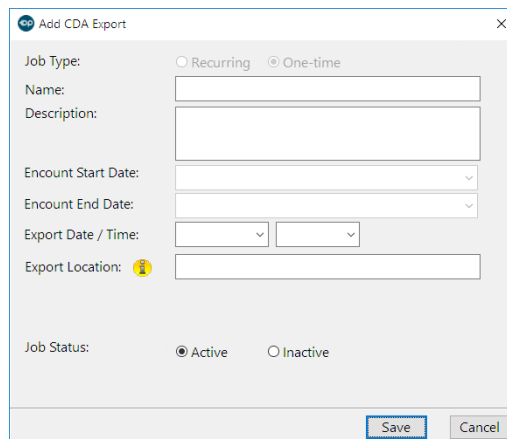Last Modified on 07/06/2023 12:58 pm EDT

Version 20.16

About

One-time CDA Exports can be created so that a CDA file is exported at a specified date and time for a group of patients. Below, you'll learn how to:

In order to create a CDA, the logged-in user must be added as a user to the OP Patient Portal, powered by InteliChart. Additionally, the logged-in user must have the user permission **Admin_CDA_Export_Batch**. Regardless of where the batch is initiated from, 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** to obtain more information and enable this feature.

Create a One-time CDA Export from the Demographic Analysis and Recall (DAR)

1. Navigate to the Demographic Analysis and Recall report: **Practice Management tab > Demographic Analysis/Recall button** and run a **Demographic Analysis/Recall** report.
2. Click the **Export CDA** button. The **Add CDA Export** window is displayed.
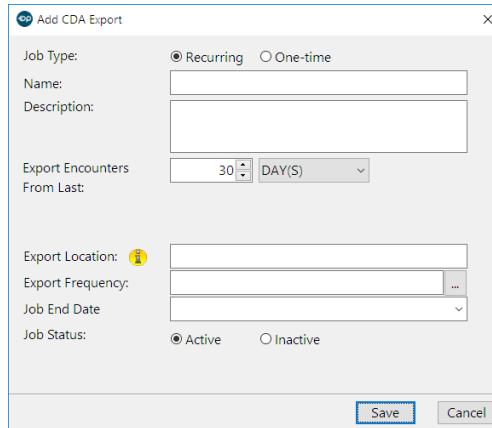

3. Complete the following fields:

   - **Job Type**: The **One-time** radio button is selected and cannot be changed.
   - **Name**: Enter a name for the report. Example: Well Visits since 7/31/18.
   - **Description**: Enter a description for the report. Example: Well Visits since 7/31/18.
   - **Encounter Start and End Date**: These fields cannot be edited while creating the CDA Export from the DAR. The date range included in the CDA is from the date of the first Encounter to current day.
   - **Export Date / Time**: Enter a date or click the drop-down to select from the calendar. Enter a time or click the drop-down to select a time. If you want the export to run immediately, set the date and time fields appropriately.

4. Click the **Save** button.

The CDA export will run at the scheduled date and time that is set in the Export Date / Time field for all patients captured from the Demographic Analysis and Recall report. The content within each CDA will include all clinical information including the Encounter or Well Visit date captured in the report. A copy of the CDA is saved in each patient's Documents (Document Management) under Image Category **:CDA**. To view the status of the Export, navigate to the CDA Export window: **Admin tab >**

Create a One-time CDA Export from the CDA Export Window

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

3. Complete the following fields:

   - **Job Type**: Select the **One-time** radio button if not already selected.
   - **Name**: Enter a name for the report.
   - **Description**: Enter a description for the report.
   - **Encounter Start and End Dates**: These fields are used to create your patient list. Enter the date range for visits which should be included in the Export Job.
   - **Export Date / Time**: Fill in the date and time that this One-time Export Job should run.

4. Click the **Save** button.

The CDA Export will run once at the scheduled time and will include all patients that had an Encounter or a Well Visit between the start and end date of the report. The contents of the CDA will be specific to an Encounter or Well Visit. A copy of the CDA is saved in each patient's Documents (Document Management) under Image Category **:CDA**. To view the status of the Export, navigate to the CDA Export window: **Admin tab > CDA Export > One-time tab**

Version 20.15

Overview

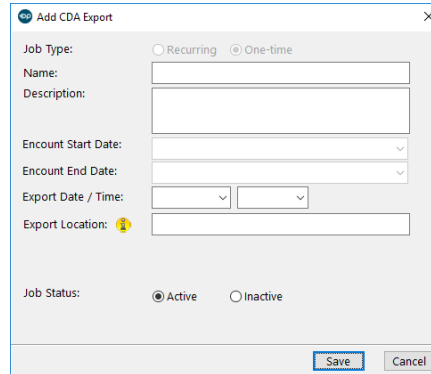One Time CDAs can be created and exported at a specified date and time for a group of patients from:

- The Demographic Analysis and Recall (DAR) report
- 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 InteliChart. Additionally, the logged-in user must have the user permission **Admin_CDA_Export_Batch**. Regardless of where the batch is initiated from, 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 to obtain more information and enable this feature.

One-time CDA From the Demographic Analysis and Recall (DAR)

1. Navigate to the Demographic Analysis and Recall report: **Practice Management tab > Demographic Analysis/Recall button** and run a **Demographic Analysis/Recall** report.
2. Click the **Export CDA** button. The **Add CDA Export** window is displayed.
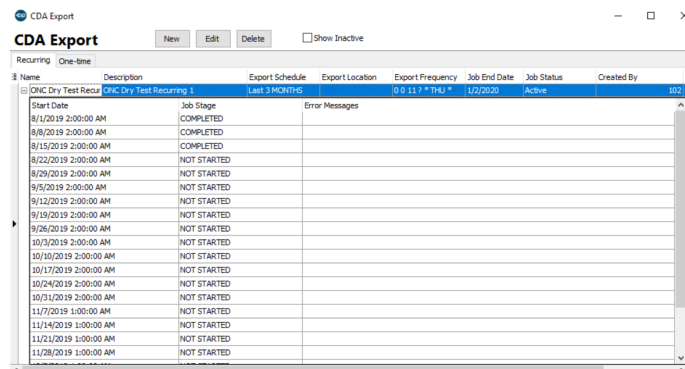

3. Complete the following fields:

   - **Job Type**: The **One-time** radio button is selected and may not be changed.
   - **Name**: Enter a name for the report. For example: Well Visits since 7/31/18.
   - **Description**: Enter a description for the report. For example: Well Visits since 7/31/18.
   - **Encounter Start and End Date**: These fields cannot be edited while creating the CDA Export from the DAR. The date range included in the CDA is from date of birth to current day.
   - **Export Date / Time**: Enter a date or click the drop-down menu to select from the calendar. Enter a time or click the drop-down menu to select a time. If you want the export to run immediately, set the date and time fields appropriately.
   - **Export Location**: Enter the S3 destination of the export job. See the Overview section above for more information.
   - **Job Status**: Set the job status as **Active**. The job can be marked **Inactive** when the user no longer wants the job to run.

4. Click the **Save** button.

The CDA export will run at the scheduled date and time that is set in the Export Date / Time field for all patients captured from the Demographic Analysis and Recall report. The content within each CDA will include all clinical information including the Encounter or Well Visit date captured in the report. A copy of the CDA is saved in each patient's Documents (Document Management) under Image Category **:CDA**.
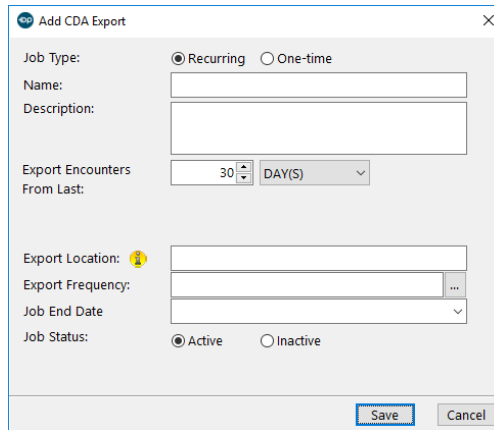
CDA Export From the CDA Export Window

1. Navigate to the CDA Export window: **Admin tab > CDA Export button**.

2. Click the **New** button. The **Add CDA Export** window is displayed.

3. Complete the following fields:

- **Job Type**: Select the **One-time** radio button.
- **Name**: Enter a name for the report.
- **Description**: Enter a description for the report.
- **Encounter Start and End Dates**: These fields are used to create your patient list. Enter the date range for visits which should be included in the export job.
- **Export Date / Time**: Fill in the date and time that this one time export job should run.
- **Export Location**: Enter the S3 destination of the export job. See the Overview section above for more information.
- **Job Status**: Select the Active radio button. The job can be marked **Inactive** when the user no longer wants the job to run.

4. Click the **Save** button.

The CDA Export will run once at the scheduled time, and will include all patients that had an Encounter or a Well Visit between the start and end date of the report. The contents of the CDA will be specific to an Encounter or Well Visit. A copy of the CDA is saved in each patient's Documents (Document Management) under Image Category **:CDA**.