Electronic Health Information (EHI) Export

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Version 21.3

> **Path: Admin > Electronic Patient Records Export > New Electronic Patient Record Export**

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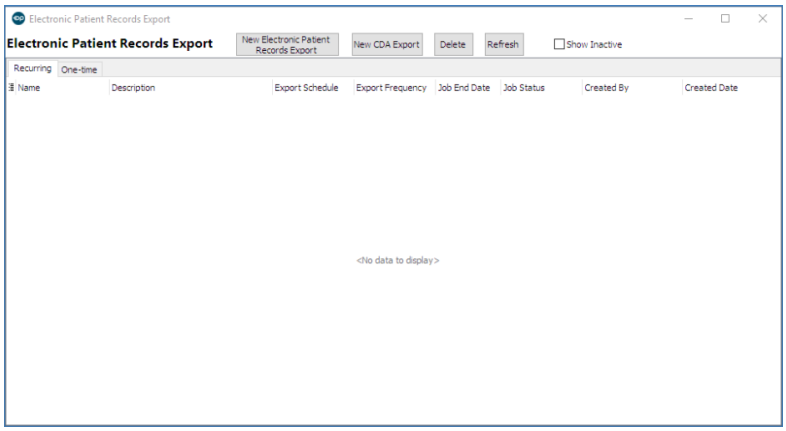
About

EHI Exports can be created and managed through the Electronic Patient Records Export window. In the Electronic Patient Records Export window you will be able to:

- Define the Electronic Records Exports description
- Determine which patient you would like to export or bulk export
- Define the date & time when the export occurs



Security Permissions

There is a security permission around who can access Electronic Patient Records Export window:

- **Admin_CDA_Export_Batch:** Allows access to the Electronic Patient Records Export window under the Admin tab.

New Electronic Patient Record Export Criteria

When setting up an EHI export there are a couple of fields that need to be populated in-order for the job to be scheduled. We will overview one at a time.

Single Patient or All Patients Check box

First, decide whether you want to export data for a single patient or for all patients. You might choose single patient export for a patient leaving your practice, for medicolegal purposes, or for research. You might choose to export all patients if your practice is being sold, closing down, and/or migrating away from OP.

Name

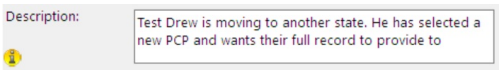
Once you have selected Single Patient or All Patients, you will see the Name field auto-populate with the type of export being performed. This field cannot be edited:

- **Single Patient**: When performing a single export, the Name field will populate with the patient's first name, last name and patient ID number.

- **All Patient**: When performing an export for all patients, the name field will populate with ALL PATIENTS.

Description

This field will allow you to make any notes that are needed to document why the job is being performed. This is a required field.



The Yellow Information icon

This will link you to general information on how long a bulk export will take. Please note that there are many variables that play a part on how long the export will take.

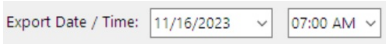
Export Location (Self-Hosted only)

This field is only required for client-server (self-hosted practices.) In this field, set the destination folder in which you would like the export to save.

Please note: For Windows server clients, the destination folder (path) must be a local path on your OP server -- it cannot be a path on a workstation running OP. (Linux server clients who have OP services running on another computer need the destination folder (path) to be a local path on this computer).

Be sure the folder/path exists before you start exporting! If you need assistance identifying the server or a proper path, please contact your local IT support.

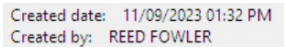
Export Date / Time



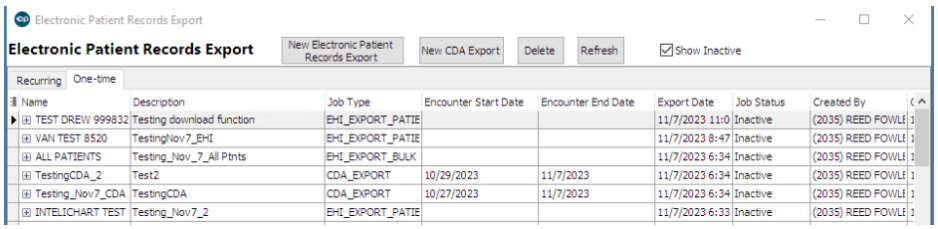
This field will allow you to set the date and time you would like to run the job. Please note that running this during business hours will impact your system's performance. We strongly advise that large jobs be scheduled for nighttime hours.. NOTE The Export

Date and Time must be a future date/time.

At the bottom of the screen, there is a record of who created the job and when:



What happens when the job is complete?

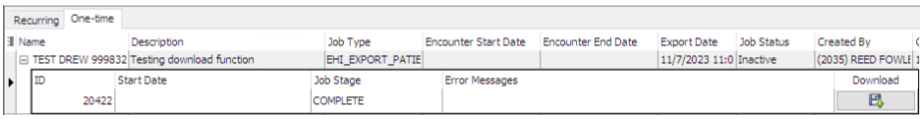


When the job completes, follow these steps to access the exported data:

1. Open the Electronic Patient Records Export window by navigating to **Admin** > **Electronic Patient Records Export**.
2. Select the **One-time** tab.
3. Select **Show Inactive** checkbox to display the jobs that have already been completed.
4. Find the job you want to see the status of and select the **+** icon (on the left side of the row.)
5. Finally, locate the final export file(s).

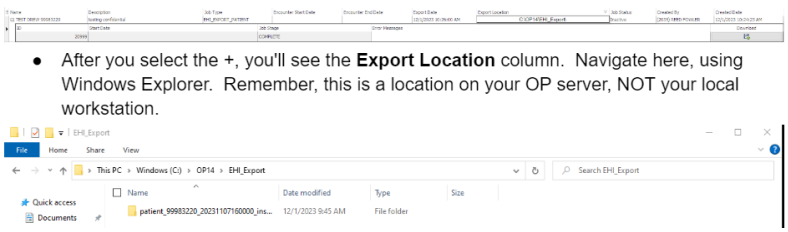
The next steps depend on whether you are using cloud-based OP or client-server based OP:

Cloud (Hosted)



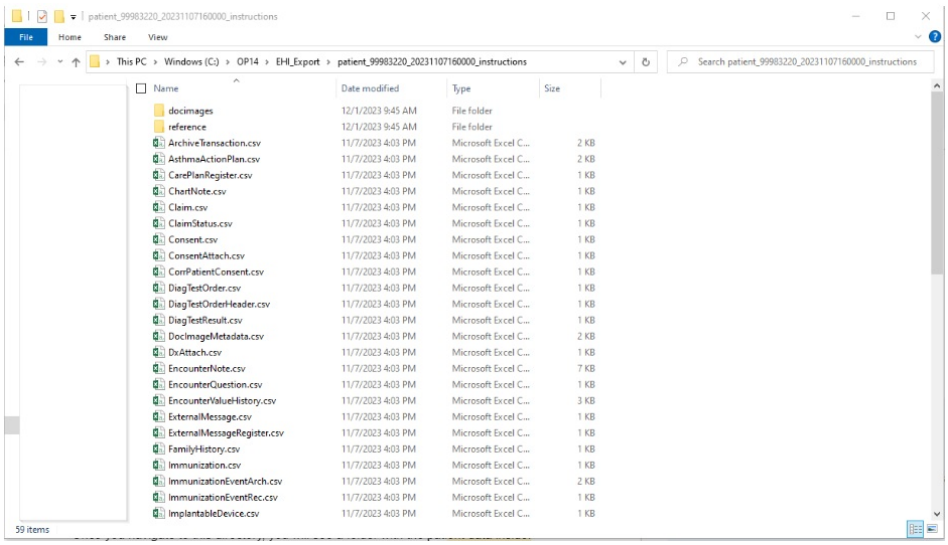
1. After you select the **+**, you will see a **download** icon. Select the icon and it will start downloading to your default download location.
2. Your default download location is set through your Internet browser. If you're unfamiliar with how to set this for your browser:
    - Chrome
    - Firefox
    - Edge
3. Each browser on each workstation will potentially need to perform this procedure.

On-Prem (Self-Hosted)



- After you select the **+**, you'll see the **Export Location** column. Navigate here, using Windows Explorer. Remember, this is a location on your OP server, NOT your local workstation.

1. After you select the **+**, you'll see the **Export Location** column. Navigate here, using Windows Explorer. Remember, this is a location on your OP server, NOT your local workstation.
2. Once you navigate to this directory, you will see a folder with the patient data inside.

What data is downloaded?

The data is downloaded as a ZIP file, to reduce the size. If you extract the ZIP file, you'll see the patient data: