

Cloud Import/Export Workaround

Last Modified on 05/28/2024 8:39 am EDT

The Import and Export features have been currently suspended. Our team is working to restore functionality, and we apologize for any inconvenience this may cause you. In the meantime, you can follow these steps to Import and Export certain files into OP:



Note: This change only affects Cloud users.

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Import Workaround

Import Only Requirements

Your workstation must have [Remote Scan](#) installed on any machine which has a scanner attached to it in order to scan directly into OP.

Import Workaround Step by step

Follow these steps to import documents into OP using **Remote Scan**:

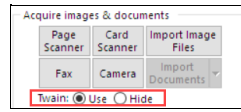
1. Print the document.
2. Navigate to the Manage Documents window:
 - **Clinical or Practice Management tab > Document Mgmt button**
 - **Clinical, Practice Management, or Billing tab > Patient Chart button > Documents**
3. Click the **New Document** button



Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click **None**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

4. Place the document onto the document scanner.
5. Click the **Page Scanner** button. The scanner activates and the **Scan Options** window is displayed

Note: The Twain interface must be enabled by selecting the **Use** radio button in the **Twain Use/Hide** field below the device icon buttons.

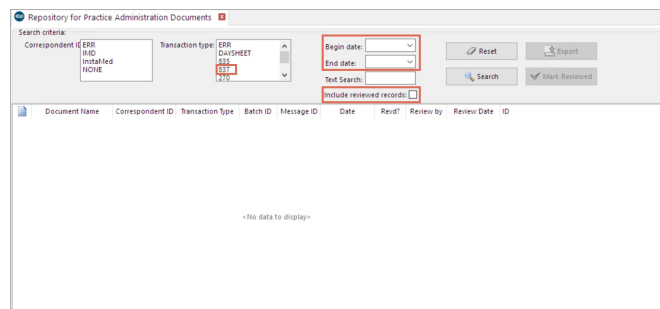


6. Click the **Scan** button.
7. Repeat these steps with the reverse side of the page, if needed. This is only necessary if your scanner doesn't have a duplex scan option. The image(s) are displayed as thumbnails in the **Sketch Panel**.
8. Select the **Image(s)** in the **Sketch Panel**.
9. Drag and drop the **Page(s)** to the **Document Panel**.

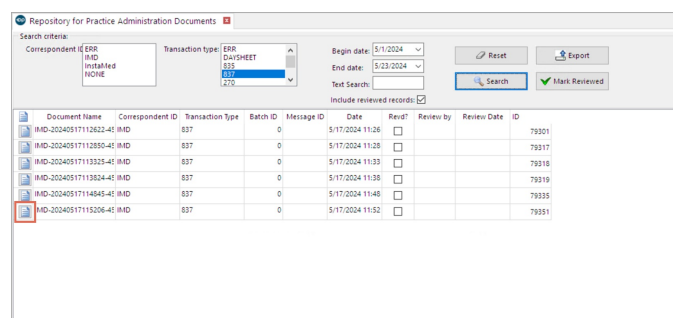
Export Workarounds

837 Export Workaround

1. In OP, navigate to **Admin > Admin Documents**.
2. The Repository window will open.
 - o Leave the **Correspondent** field blank:
 - o In the **Transaction Type** field, choose **837**.
 - o In the **Begin date** and **End date** fields, set the **date range for the 837 files** you are looking for. **Note:** This is the date that the claim file batches were created, which is not necessarily the same as the date of service (DOS) or the dates the claims were created.
 - o Check the **Include reviewed records** box.



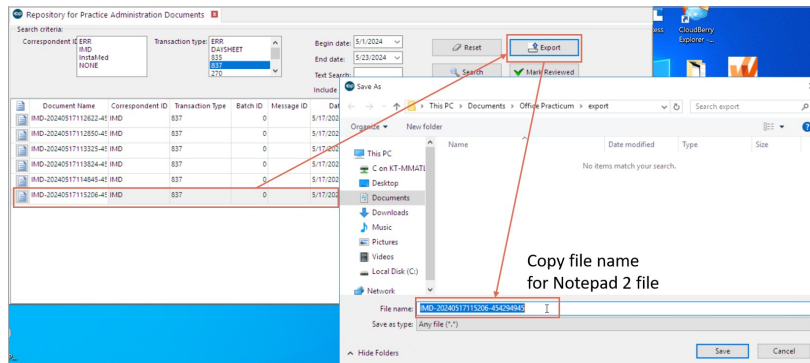
3. Click the **Search** button.
4. The set of 837 files matching your search criteria will appear. Click the notepad icon on the left side of the file row you want to copy.



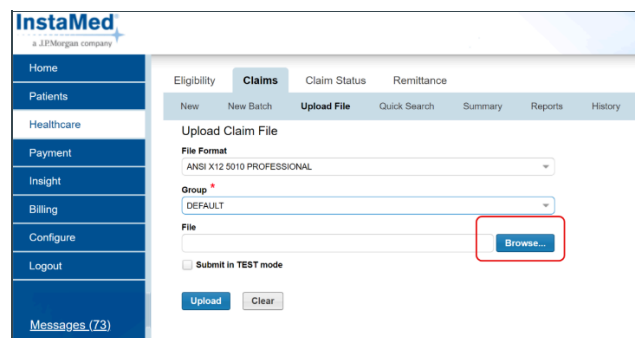
5. A Windows notepad ("Notepad #1") containing the data will appear. **Click anywhere** in the body of the text of Notepad #1, then click **Ctrl-A** to copy everything. You'll see the entire file contents become selected:
6. Now, with everything highlighted, click **Ctrl-C** to copy the contents.
7. **Open** another Notepad instance (Notepad #2) on your computer, e.g by clicking the Windows button and typing

NOTEPAD. A blank instance of Notepad will appear.

8. **Click** into the Notepad #2 instance so the cursor is located in the body of the blank Notepad.
9. Now, with your cursor in your new blank Notepad, click **Ctrl-V** (Paste.) The text you copied over now appears in the new Untitled instance.
10. **File > Save** the file. Choose a location on your computer that's easy to find later.
11. If you want to keep the same naming convention without manually entering the file name:
 - o **Highlight** the file in the Repository window you just copied.
 - o Click the **Export** button.
 - o When the Save As dialog box opens, **copy the file name**.
 - o Rename the file you saved earlier by **right clicking** the file and selecting **Rename**.
 - o **Ctrl-V (Paste)** the new file name with its proper suffix.

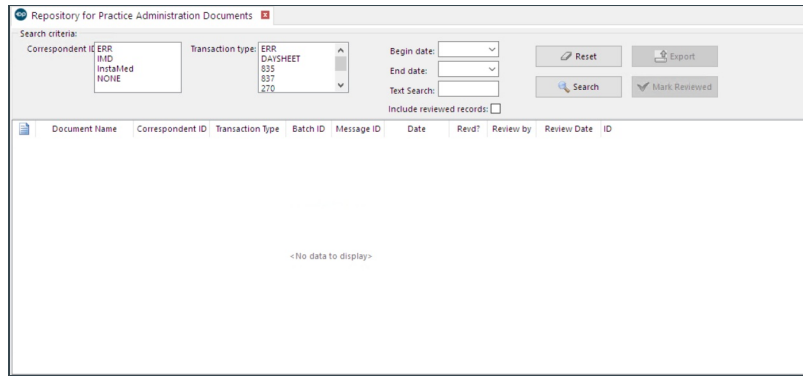


12. Now you can upload the file directly to your clearinghouse. For example, if you use Instamed, go to **Claims > Upload file**, set the **File Format** dropdown to ANSI X12 5010 PROFESSIONAL, then click the **Browse** button (highlighted) to navigate to the file you saved in step 13, above.

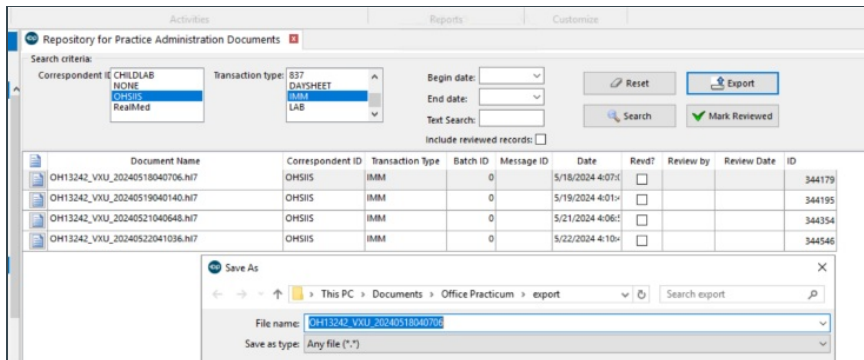


Immunizations Export Workaround

1. In OP, navigate to **Admin > Admin Documents**.
2. The Repository window will open:
 - o Select the name of your IIS in **Correspondent**, or alternatively you may leave the field blank.
 - o In the **Transaction type** field, choose **IMM**.
 - o In the **Begin date** and **End date** fields, set the **date range for the immunization batch files** you are looking for. **Note:** This is the date that the imms file batches were created, which may or may not be the same as the date the vaccines were administered.
 - o Check the **Include reviewed records** box.



3. Click the **Search** button. The set of immunization files matching your search criteria will appear.
4. Now, click the **Notepad** icon on the left side of the file row you want to copy. An HL7 file will pop up in a Notepad file.
5. Open a **second instance of Notepad** on your computer (e.g. by clicking the Windows button and typing NOTEPAD.)
6. **Copy** the contents of the first Notepad into the second Notepad. (You can use the Ctrl-A, Ctrl-C, Ctrl-V method described above in 837 Workaround.) You'll see the HL7 data appear in your second Notepad.
7. Now, prepare to save your file. It's important to keep the same file name that OP assigned for immunization files, so you'll want to capture the file name that OP assigned rather than just naming your file "myimms.txt."
8. Return to **Admin Documents** and click the **Export** button. A Save As popup will appear. Click in the **File name field** and **copy the filename** that is present:



9. Return to your newly created Notepad copy and select **File > Save As** from the menu bar.
10. Navigate to the folder you typically export your batches into.
11. **Paste** (Ctrl-V) the name of the filename you copied and append **.hl7**
12. Set the file type as **Any file (*.*)**
 - o Ex: OH132424_VXU_20240522040706.hl7
 - o File type Any file (*.*)
13. **Upload** to the site.
14. Mark the file in Admin Documents as **Reviewed (Revd)**.

Database Viewer Export Workaround

1. Open the Database Viewer: **Tools > Database Viewer**.
2. **Search for** and **Run** the report you want to export.
3. Click into the bottom box with the report. Click **CTRL A** to select all, then **CTRL C** to copy.
4. Open an **Excel file**.
5. Click into the spreadsheet and **paste (CTRL V)**.
6. **Save** wherever you would normally save your exported reports.

Other Administrative Documents Export Workarounds

While most clients need these workarounds for outgoing claim (837) and immunization files, you can use this method to extract

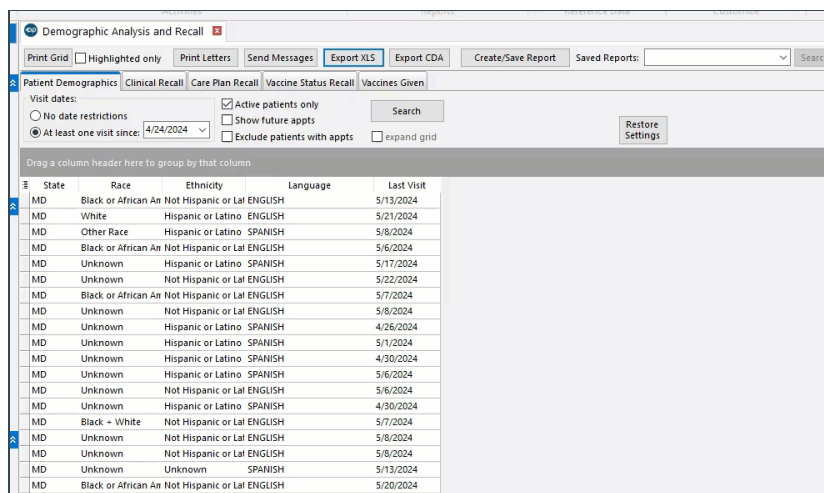
any other **Administrative Documents** located in your OP. For example, you might want **eligibility validation files ("271")**, **Instamed portal credit card payment receipts ("PAY")**, or **daysheet records ("DAYSHEET")**. If this is the case, you can use steps similar to the ones outlined in the 837 and Immunization Export sections..

Contact OP Support if you have any questions about extracting lesser-used document types out of your Administrative Documents.

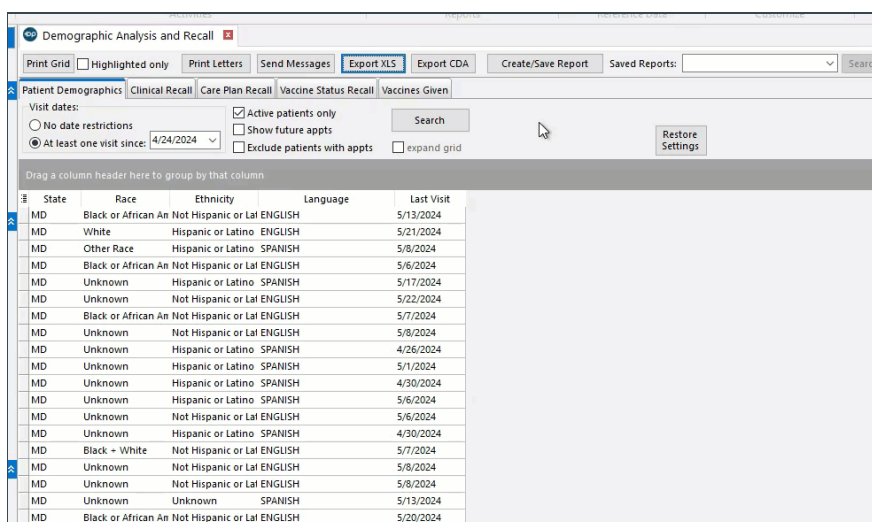
Reports Workarounds

DAR: How can I export a spreadsheet from the DAR?

1. In OP, navigate to the DAR.
2. Click the **Export XLS** button.
3. In the Save As window:
 - o Click the drop-down in the **Save as type** field and select **Delimited files (*.csv)**.
 - o Click **Save**.



4. Click the **Export XLS** button again.
5. You'll see the CSV file you just saved in the center panel **Right click** on the file name and choose **Open with > Notepad**. Your data will pop up in Notepad:

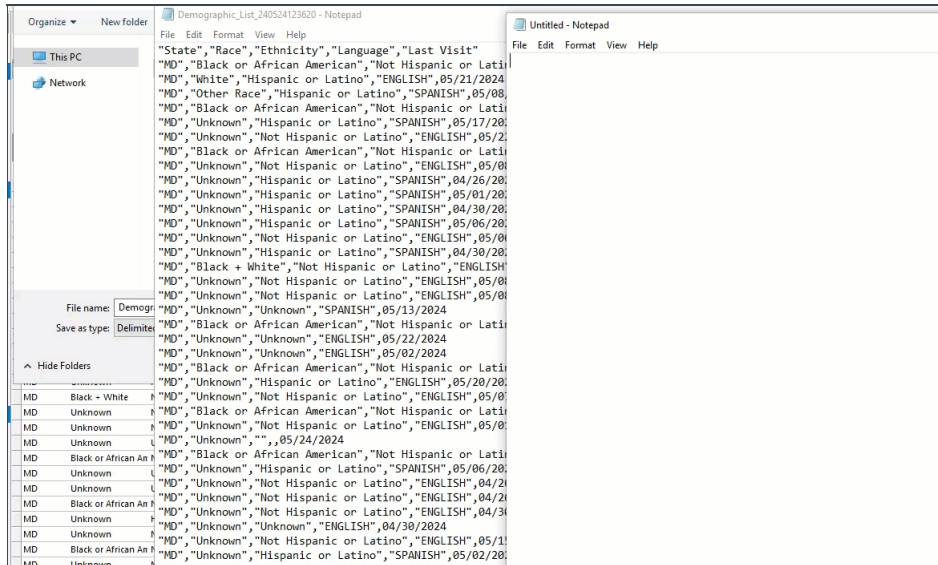


6. On your own computer, open an instance of **Notepad**. For Windows computers, you can press the Windows button and

then type NOTEPAD.

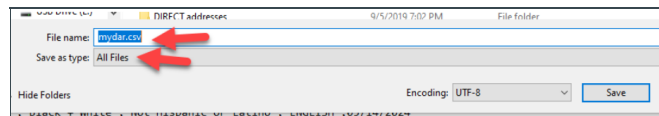
7. **Copy** the data to your new instance of Notepad:

- In the old instance, **click** anywhere, then **Ctrl-A** to select all then **Ctrl-C** to copy it.
- Then **click** anywhere in your **new Untitled instance of Notepad**, and enter **Ctrl-V** to paste.



8. **Save** your data:

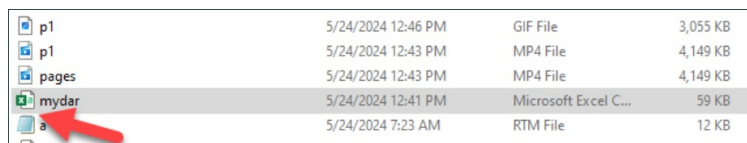
- From the file bar, select **File > Save As**.
- Set **Save as type** to **All Files**.
- Enter a **file name ending with .CSV**:



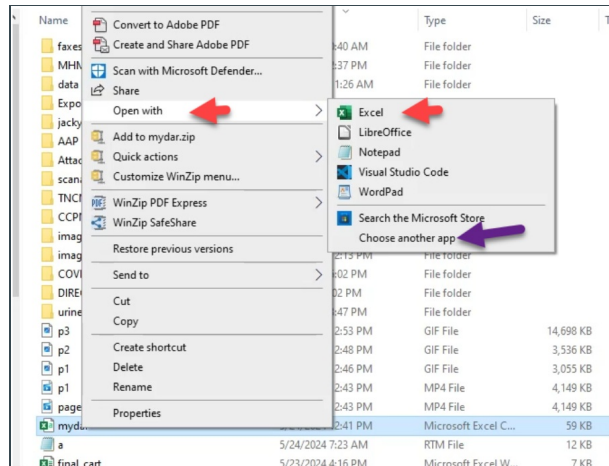
9. Finally, navigate to the file you just saved:

- If you already see a green Excel icon, you can simply **double-click** to **launch the file in Excel (a)**.
- Otherwise, you can **right-click** on the file and choose **Open with**, then **Excel**. If you don't see Excel listed readily, you can search for it with **Choose another app (b)**.

(a)



(b)



Billing Transaction Reports: How can I export a spreadsheet from Transaction Analysis, Reimbursement Analysis, or Standard Billing Reports?

1. Navigate to one of the above reports you would like to export.
2. Click the **Export XLS** button.
3. In the Save As window:
 - Click the drop-down in the **Save as type** field and select **Delimited files (*.csv)**.
 - Click **Save**.

File name:	Billing_Analysis_240524145825
Save as type:	Delimited files (*.csv)

4. Click the **Export XLS** button again.
5. You'll see the CSV file you just saved in the center panel. **Right click on the file name** and choose **Open with > Notepad**.
6. Follow **steps 7-10** outlined in the DAR section above.

RCM Analysis Reports: How can I export the RCM Daily Summaries or Monthly Summaries?

1. Navigate to one of the above report summaries you would like to export.
2. Click the **Save as CSV** button as you normally would.
3. Enter a filename and click Save.

File name:	rcm_stuff
Save as type:	Comma-Separated Value Files (*.csv)

4. You'll be taken back to the RCM Report screen. Click the **Save CSV** button again.
5. You'll see the CSV file you just saved in the center panel. **Right click on the file name** and choose **Open with > Notepad**.
6. Follow **steps 7-10** outlined in the DAR section above.