Connect - Patient Exports Documentation

170.315(b)(10) Electronic Health Information Export

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Summary

Connect is now capable of exporting patient EHI following the §170.315(b)(10) Electronic Health Information Export requirements. This document will show you how a user with the appropriate permission may utilize Connect's Export Patient feature. The feature will enable you to export patient's EHI data in CSV format. The data can be exported either for a single patient or for all patients in the organization.

Accessing the Export Patients feature

In order to access this feature, the user must have the appropriate role and feature enabled. An admin may enable this role to a specific group or user by:

- 1. Providing User or Group the System Role:
 - a. Go to Utilities > Group Manager (or User Manager). Once you select the Group or User, switch to **System Roles** tab and click the **Modify System Role** button. Check the **ExportPatients** and hit OK and save.



- 2. Enabling the Export Patients option in Patient Menu:
 - a. Go to Utilities > Group Manager (or User Manager). Once you select the Group or User, switch to Menu Access. Enable **Export Patients.**

🙀 Groups		
Group Name Description	Data Operator	Save Cancel
System Rol	les Users Survey Access Menu Access Patient Reports	- ↓ ▷
Men	u Access	A
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	SPatient ✓ &New Patient ✓ & Kherapist Dashboard &Merge Patient ✓ Patient Satisfaction Export Patients Switch User Log Out ✓ Exxit ASHT SL CONNECT	

Users with access will now be able to access this feature in Connect via the Patient menu in the top menu bar and selecting **Export Patients.**

Patient Analytics 	Doc Mgmt Scheduler Inpatient Mgm
New Patient	
Therapist Dashboard	Appointments Patient Search
Merge Patient	Facility: RandyFacilityShort
Patient Satisfaction	
Insurance Notifications	
Export Patients	
Switch User	
Log Out Expor	t Patients
Exit	
Search	
A December 2023	
SMTWTFS	-1
26 27 28 29 30 1 2	
3 4 5 6 7 8 9	
10 11 12 13 14 15 16	
24 25 26 27 28 29 30	
31 1 2 3 4 5 6	
Open Patient	Ī
Add Patient	

The Exports Patient window will open

nn smith			Search				Export All
LastName	FirstName	MiddleName	DayPhoneNum	EvePhoneNum	DOB	Gender	MRN
SMITH	JOHN			7075551212	01/01/1960	Male	654321

Exporting EHI of a Single Patient

To export a single patient:

- 1. Utilize the search bar to search a patient. You may search by any of the fields shown in the grid.
- 2. Set the Export Location.
- 3. Hit Export.
 - a. You will be prompted if you are sure to export the patient. Hit Yes.



Exporting EHI of the Patient Population of the Organization

To export the patient population of the organization:

1. Check Export All

🙀 Export Patients	×
Search and select a patient to export or select Export All to export all patients Search	Export All
Export Location C:\Users\testuser\Desktop	Browse
	Export

- 2. Set the Export Location
- 3. Hit Export
 - a. You will be prompted if you want to proceed. Hit Yes.

Confirm Export	×
Are you sure you want to export all patients?	,
Yes No	

File Format

- The file format of the patient export files is in a form of CSV files (comma delimited)
- When the user hits Export, a folder named **Patient Exports** will be created in the specified Export Location.
 - If a single patient is exported:
 - A folder in the following name structure will be created
 - <Last Name>_<First Name>_<MRN>
 - Within the patient's folder, a CSV file will contain the EHI of the patient. The CSV file name structure is:
 - <Last Name>_<First Name>_<MRN>_<DateTime>.csv

Ģ	> Desktop > PatientExports > Smith_B	ob_2087729553		
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1	Name	Date modified	Туре	Size
•	Smith_Bob_2087729553_20231211140422.csv	12/11/2023 2:04 PM	CSV File	1 КВ
* *				

- If all patients were exported, a CSV file containing EHI of all patients will be generated in a file with the following name structure:
 - EHIExport_<ORGCODE>_<DateTime>.csv
 - The ORGCODE is your organization code

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1	Name	Date modified	Туре	Size	
	Smith_Bob_2087729553	12/11/2023 2:04 PM	File folder		
	SMITH_JOHN_654321	12/11/2023 2:04 PM	File folder		
	EHIExport_TESTORGCODE_20231211140429.csv	12/11/2023 2:04 PM	CSV File	51 KB	
*					