Electronic Health Information Export

• Electronic Health Information (EHI) Export contains " electronic protected health information" (ePHI) as defined in 45 CFR 164.501, along with additional data in the patient chart.

• Psychotherapy notes or information compiled in reasonable anticipation of, or for use in, a civil, criminal, or administrative action or proceeding are not automatically included, nor excluded from the export. A user will need to review the data available to determine which data should and should not be generated for export.

• There are several ways to narrow the data being captured in the files. If choosing to narrow the population included, please use caution and review all details to ensure you are getting the output intended.

• To access this area of MEDENT, a user must have security clearance for Data Export/Import/Connection Table and Electronic Health Information Export.

• Documents, Triages and Todo's will be created as HL7 C-CDA 2.1 Unstructured Documents (UD), containing a B64-encoded PDF. All documents will be zipped together upon creation and included within the zip file generated for export. All triages will be zipped together upon creation and included within the zip file generated for export. All todos will be zipped together upon creation and included within the zip file generated for export.

Implementation and Utilization

Each area of the Electronic Health Information Export is defined below. To access this in MEDENT use the following Navigation: Medical Records > Data Export/Import/Connection Table > Electronic Health Information Export.

Setup

• Create a Setting to indicate any filters needed for patient population, as well as setting to autorun over night, if needed.

Add New Setting: Click this to add a new setting for running the export process. When a setting is added, it gets a numerical ID assigned to it that will be referenced in other areas.
ID: Each setting gets a numerical ID assigned in chronological order. The significance of this ID is to keep multiple settings distinguished if generating more than one export.
Filters & Options: Filter the patient population included in the export process. Included are Demographic Filters, which Data Feeds are included (at least one is required), Financial Data (Optional), and Additional Exports of data including Documents, Triages and/or Todos.

Demographic Criteria
Doctors: Provider assigned to the patient in the patient information.
Locations: Location assigned to the patient in the patient information.
Primary Care Providers: PCP provider assigned to the patients in the patient information.
Referring Doctors: RDr provider assigned to the patients in the patient information.
Age: Age of patient at the time of the report generation.
Include Insurances: Active insurance on the patient account at the time of the report generation, regardless of billing order.
Exclude Insurances: Exclude patients with an active insurance on the patient account at the time of the report generation, regardless of billing order.
Patients: Generate the report for only patients selected here. Default is to include All patients.
Patient Status: Patient status defaults to include only Active patients, but can be adjusted.
Exempt Status: Default is to exclude exempt patients. This option is DM/HM Report Exempt option in the Restrictions section of the Patient Status screen.

Race: Race assigned to the patient in the patient information.
Ethnicity: Ethnicity assigned to the patient in the patient information.
Sex: Sex assigned to the patient in the patient information (Note: this is not referencing the Sex at Birth field, only the Sex field at this time.)
Primary/Members: Primary vs Member accounts included based upon selection if practice is using family accounts.
Portal: Active portal patients or non-portal patients.
Patient Characteristics: Patient characteristics, as setup in the Patient Status screen.

Data Feeds (Required)
Patient Files: Defaults to export all data files.

Financial Export (Optional)
Export Financial Data: Select a Data Format Maintenance if you wish to include financial information in the export. When selected, the system uses the logic in place to generate a History Transaction Report with Single Sort for the data points referenced in the Data Format Maintenance. The file format will align with the other text Data Feed files.
Doctors: Select to include or exclude provider data for the financial piece of this export.
Locations: Select to include or exclude location data for the financial piece of this export.
Insurances: Select to include or exclude location data for the financial piece of this export.
Activity and/or History Files: Select Activity, History or Both to be included

Additional Exports (Optional)
Export Documents: Include or exclude documents based on document code and/or chart button.
Export Traiges: Include or exclude triages based on reason code.
Include Blank: Check this box to include triages without a reason code indicated.
Export ToDos: Include or exclude todos based on reason code.
Include Blank: Check this box to include todos without a reason code indicated.

Privacy Alert: Check this box to exclude patients with a privacy alert on their account. Default is unchecked, which includes these patients.
By E-Superbill: Check this box to generate the patient listed based upon E-Superbill rather than the default of basing the population on booked appointments.
Autorun: Check this box to schedule the report to Autorun during the nightly processes.
Time Frame/Date Range: The frame indicated tells the system the population of patients with an Appointment or E-Superbill in their chart to include in the export.
Scheduled: This is the date the report will kick off to generate the data.

Delete: Select this to remove the setting. Once deleted, you cannot re-access this setting. A brand new setting will need to be created.

At the top of the Setup page includes a Log of any changes made to this area as well as a place to indicate additional custom-created Closed Superbill status's that should be captured, if the setting is being exported by Superbill's instead of Appointments.

Create

Each setting created in the Setup area is also listed in Create. Review options and further limit selection, if needed to manually generate data for export.

ID: Each setting gets a numerical ID assigned in chronological order. The significance of this ID is to keep multiple settings distinguished if generating more than one export.
Filters & Options: Filters are adjusted in the Setup area. This screen only shows a reference point to alert the user that these filters are applied to anything generated from this screen as well.
Data Feed: Include all or limit the data being generated further beyond what's already limited in the Setup area.

Patient(s): Include all or select specific patient(s) to generate for export.
Privacy Alert: References the Setup area for this setting and displays if patients with a privacy alert are excluded. View only.
Selected By: Referenced the Setup area for this setting and displays if patients are queried based on Appointments or E-Superbills. View only.
From: Indicate the start date for which the patient population should be queried.
To: Indicate an end date for which the patient population should be queried.

Create: After all options have been reviewed, select this button to begin generating the data for export.

Send

Completed reports that have not exported out of the MEDENT system will remain in the Send screen until sent to an external destination using "Send" or deleted.

Files with an asterisk indicate they have been generated with the intention of saving the data to the Local PC. These files will remain in the Send screen until deleted. They can be exported at any time.

File Name: Complete path and file name that has been generated for export.
File Date: Date and time the file was created.

Send: Exports file(s) to their intended destination, as defined in the Control File. The File Name referenced the setting# and Connection Name for which the export is intended to be sent.

View: Click on a file or check the box and select View to open contents of file.

Delete: Delete all selected files. Once removed from this list, the files cannot be restored.

Export to PC: Save selected file to your Local PC at the destination of your choice. Use caution when exporting, saving and sending PHI to ensure HIPAA guidelines are followed.

Control File

Setting #: Setting ID which aligns with the Setup and Create areas.
Filename: Enter the prefix the filename should include. Special characters are not allowed, including spaces.
File Format: Indicate the delimiter desired from the options available.

- PIPE (Quotes)
- PIPE (without Quotes)
- CSV (Quotes)
- CSV (without Quotes)

Name Format: Select the desired filename suffix used for filename creation. From date and through date are the dates for which the patient population has been based upon. Process ID is the unique ID for the session that generated the file.

- _<File create date and timestamp>_<Practice ID>_<Process ID>
- _<File create date and timestamp>_<Process ID>
- _<From date>_<Through date>_<Process ID>
- _<From date>_<Through date_<Practice ID>_<Process ID>

Zip Files: Check this box to zip all files together for export.
Connection: Select a connection from the Connection Table to export the data to a designated destination, or select For export to Local PC to generate the file on the server so that it can then be exported upon completion.