Internal Workflow - EHI Bulk Patient Request

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EHI Export: Overview

Creating a New Request : EHI Export

The internal workflow requires a practice level permission request to be granted.

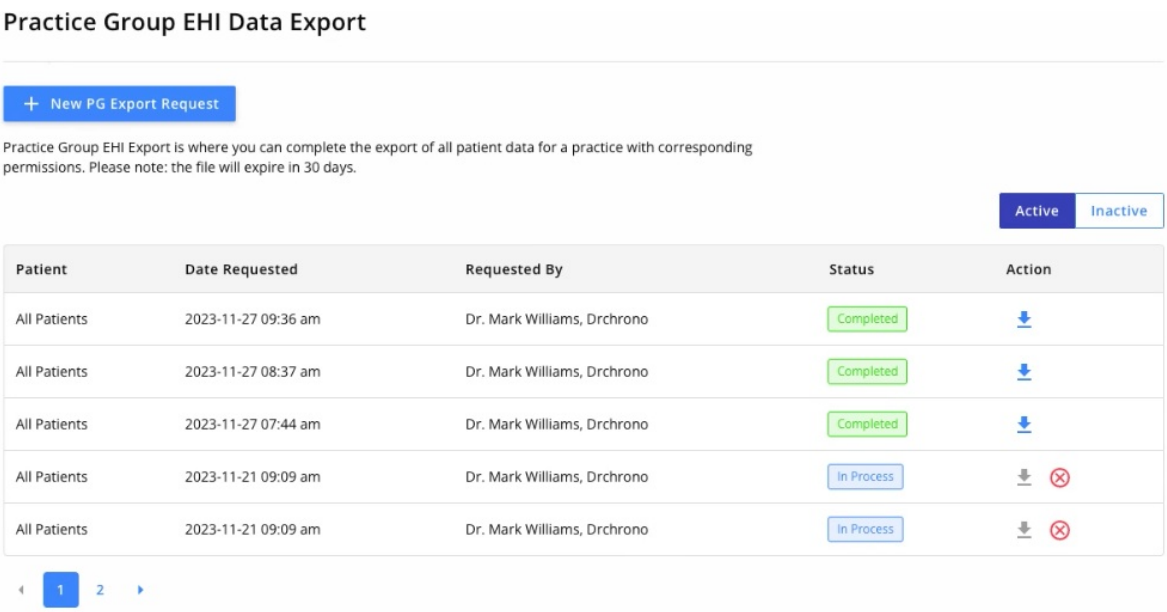
Practice Level Permission Request

When a user selects the option for a bulk EHI export, an internal workflow has to be completed by a DrChrono employee to trigger the request via Practice Group settings.

If you need permission to complete a Bulk/Practice Level export for a customer you will need to Completing the Access Request Form (EHI Export Practice Level Permission Request).

Once permission is granted, follow the steps below.

Steps

1. From the CRM page select PG Settings.
2. Scroll to the bottom of the page to Practice Group EHI Dashboard.
3. Click New PG Export Request button.

The user will receive a notification will be sent to the Message Center (All Messages) with a link to the EHI dashboard once the export is complete.