# Creating a New Request : EHI Export

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EHI Export: Overview

You can create two types of export requests: Individual and Bulk. An individual export allows you to export the data associated with a patient. A practice export will export all the patient and document data in your account. Exports are available for download for 30 days once completed. After 30 days (from the date a request has finished processing and is available for download), the request will move to the Archived tab. You will still be able to view the details of the request once it is archived, but the downloadable files will be permanently deleted and no longer available.

**How to enable the EHI Export permission?**

Account > Staff Permissions > Provider / Staff tab > View > Edit Permission , then choose the applicable permission(s) > Save.
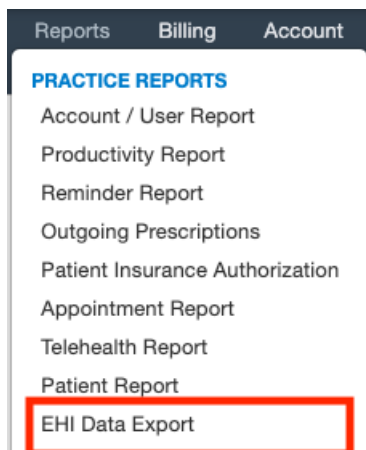
- Single Patient EHI Export
- Bulk Patient EHI Export



**Where is the functionality located?**

Both types of exports begin under the Reports menu → EHI Data Export and within the reports screen (left column).



Next, from the EHI Export dashboard, select **New Export Request**.

## EHI Export    + New Export Request

EHI Export is where you can export all patient data. You can export data for a single patient or all patients within the practice with corresponding permissions. Please note: the file will expire in 30 days.

**How to submit an export request?**

**Individual Patient Export Request**
- Select single patient.
- Enter the patient's name (only one patient can be selected, at a given time).
- Click the Request button .



A notification will be sent to the Message Center (All Messages) with a link to the EHI dashboard once the export is complete. You can view the status and download the export via the Dashboard.

**Exporting (Bulk) All Patients Data**
Please note that practice-level exports may take a significant time to process depending on the amount of data in your account.

With a practice export, you can export the data and documents for your entire patient population.
- Select all patients



- Click on the Request button to queue the export in the Active queue.
- Click start to complete the type form

1. Primary Practice Contact information

2. DrChrono username

3. DrChrono Doctor ID

4. DrChrono Practice Group ID

5. Reason for export

6. If multiple extracts (separate data) are needed

7. Specific date to initiate data export

- DrChrono will then complete the internal steps for the request.
- A notification will be sent to the Message Center (All Messages) with a link to the EHI dashboard once the export is complete.



**Navigating the EHI Export Dashboard**

You can manage your patient and practice EHI export requests on the dashboard. To access the dashboard, go to Reports menu and select EHI Data Export.

The EHI Export Dashboard will start out empty, but as you add requests you will be able to see information about each request that is still active.

There are 2 lists in the EHI Export Dashboard: Active and Inactive.
Active = is a list of current requests that are in the queue.
Columns include :

- Patient

- Patient / Chart ID #

- Date of Birth (DOB)

- Date Requested - Date that the export EHI data request was entered into the system

- Requested by - The individual that requested the EHI data request

- Status
    - Queued - The request has been received by the system and is in the process of being processed

    - In Process - The export is currently running but has not completed

    - Completed - The export report is ready to be downloaded into a zip file

- Failed - The report did not complete due to the job failing

- Action - From this column, the user may cancel the job or download the complete data export

**EHI Export**  [+ New Export Request]

EHI Export is where you can export all patient data. You can export data for a single patient or all patients within the practice with corresponding permissions. Please note: the file will expire in 30 days.

[Active] [Inactive]

| Patient | Date of Birth | Date Requested | Requested By | Status | Action |
|---------|---------------|----------------|--------------|--------|--------|
| Patient Name | 1971-09-10 | 2023-11-30 09:25 am | Provider Name | In Process | ⬇ ⊗ |

Inactive = is a list of cancelled/archived (data export is > 30 days old) requests.

Columns include :
- Patient
- Patient / Chart ID #
- Date of Birth (DOB)
- Date Requested - Date that the export EHI data request was entered into the system
- Requested by - the individual that requested the EHI data request
- Status

Expired - The report was available to the end user for 30 days but have expired after being available to the end user for a minimum of 30 days

Failed - The report did not complete due to the job failing.

Canceled - The request has been received by the system but was canceled by the user

**How do I download a completed export from the active list?**

Once an export has completed, a download icon (down arrow) button will display under the Action column. When the user clicks the button, a "Download ZIP File" pop-up window will appear that will allow the user to download the file(s) generated for the export. The time format for an exported file will appear as HH:MM:SS .

Note: The only option for downloading the EHI Data Export is via a zip file.

**EHI Export**  [+ New Export Request]

EHI Export is where you can export all patient data. You can export data for a single patient or all patients within the practice with corresponding permissions. Please note: the file will expire in 30 days.

[Active] [Inactive]

| Patient | Date of Birth | Date Requested | Requested By | Status | Action |
|---------|---------------|----------------|--------------|--------|--------|
| Patient Name | 1968-03-29 | 2023-12-18 08:39 am | Provider Name | Completed | ⬇ |
| Patient Name | 1968-03-29 | 2023-12-18 08:39 am | Provider Name | Completed | ⬇ |
| Patient Name | 1940-03-14 | 2023-12-18 08:38 am | Provider Name | Completed | ⬇ |

**How can I cancel an export?**

Only single patient exports can be canceled, not bulk exports.

- The user can cancel an export in progress by clicking on the "Red X" icon under the Actions Column located in the Active Export screen. This will stop the generation of any remaining export files, remove any export files

that were generated and change the status of the export to Cancelled.

**How can I track EHI exports?**

The audit log will capture all activity including cases where DrChrono support has to access a user's account.

- Once the user initiates the EHI export, the audit log (via Clinical >Audit Log > log type: Data Export) will capture the following data:

  - Username, Date/Time, Export Type, Patient Selected (if applicable), EHI Selected to include in the report.

  - Status of the EHI Export List as queued, in process or completed.

  - User who initiated the EHI Data Export.

  - Date/Time the EHI export was initialized.

  - Export type: single patient vs practice.

  - Patient ID of the patient's record.

  - Patient Name.

  - Patient's DOB.

  - Export Link as provided to download the EHI data export.

- In addition, based on the log type selected (Single Patient Export vs All Patient Export), the audit log will capture the following action types and details.

| Type | Action | Details |
| --- | --- | --- |
| Single Patient Export | Queued | Queued single patient export |
| | Cancelled | Cancelled single patient export request |
| | Downloaded | Downloaded single patient export file |
| All Patient Export | Queued | Queued all patient export |
| | Cancelled | Cancelled all patient export request |

**What data is included in an EHI export? Click here to view.**