Warning: Be careful and protect the exported data the same as you protect all your patient info.
Table of Contents

Authorizing Users........................................ 3

Exporting Patient Basics......................... 5
  Demographics.................................... 6
  Ledgers.......................................... 8
  Schedules........................................ 9

Export Visit Notes & Clinical Info........ 10

Export CCDA’s (Meaningful Use Users)..... 13
Authorizing Users
Only authorized users may export patient information in different forms. The first step is to give a user the security level necessary to export patient information.

1) From the Primary Menu select the **Utility Menu**.

![Utility Menu](image)

2) From the Utility Menu select the **Advanced Utilities**.

![Advanced Utilities](image)

3) Next select **Define User Security**.

![Define User Security](image)

4) On the User Security Definition screen click the **List Active Users** button and select the desired User ID.

![List Active Users](image)

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
5) Check the all the options that you want the user to have access to and be sure to include checking the **Allow Export of Patient Data** option.

---

**Advanced Options**

- Access Management Audit Reports
- Paper Prescription Access
- Paper Prescription VOID
- Access To Do List
- Allow anyone to access my Msg Center Mail Box
- Allow me to access anyones Msg Center Mail Box
- Allow Access to Secure/Portal Messages
- Allow Access to NewCrop Lab Interface
- Allow HAPI FHIR Update Access
- EMR Electronic Medical Records Access
- EMR Access ONLY
- eScripts - Write New Scripts
- Stop Posting Screen Access
- Access SOAP Note Review Window
- Update Decision Support Rules
- Display Multiple Drive Switch buttons
- Allow Export of Patient Data
- EMR Browse Only Access

---

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
Exporting Patient Basics

Authorized users can export patient demographics, financial ledgers, and even schedules into common ASCII Text files. They are in the CSV type files that can be opened with Excel or used as import information.

1) From the Primary Menu select the Utility Menu.

![Utility Menu](image)

2) From the Utility Menu select the Advanced Utilities.

![Advanced Utilities](image)

3) For each type of patient information (Demographics, Ledgers, Schedules) click the corresponding button.

- Export Patient Records
- Export Ledger Trans
- Export Schedule

---

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
Exporting Demographics

1) When you click Export Patient Records button:

- select **All Patients**
- select **Excel CSV Formatted File**
- select Doctor **00**
- select you **Output Drive** Letter
- Click the Red **Export** button
2) Next you will be prompted to select what components of demographics you wish to export; you can use the **Check All** button. Then click the **Save/Exit** button.

![Export Field Selection](image)

3) When prompted if you wish export the data now, reply **Yes**.

4) After the export file is created the **file name and location** will be displayed, in addition you will be given a prompt to open the file if you want to.

![Open Excel Formatted File?](image)

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
Exporting Ledgers

1) When you click **Export Ledger Trans** button:

- Export Patient Records
- Export Ledger Trans
- Export Schedule

2) Set the Date Range to **all possible dates**, set the Doctor to **00** and check all the check marks, then Click the **Export Excel Format** button.

3) Follow the On Screen prompts; you will receive a prompt telling you the output file will be **C:\Temp\EzTran.csv**, then another prompt asking you if you wish to open the file.

**Note**: The output will not be in date sequence.

---

**Warning**: Be careful and protect the exported data the same as you protect all your patient info.
Exporting Schedules

1) When you click Export Schedule button:

<table>
<thead>
<tr>
<th></th>
<th>Export Patient Records</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Export Ledger Trans</td>
</tr>
<tr>
<td></td>
<td>Export Schedule</td>
</tr>
</tbody>
</table>

2) Select the Year you wish to export, select the schedule number, then click the Red Export button.

3) After each schedule export you will see on the screen the name and location of the exported CSV file.

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
Export Visit Notes & Clinical Info
PowerSoftMD has a built in EMR Export for your patient data that will create a folder containing all your patient charts that can be opened with Windows without using PowerSoftMD.

1) Connect an External Drive such as a USB Hard Drive and note its Drive Letter. A folder will be created on the External Drive's Root Directory of the name of your Practice. After this process is complete you could copy that entire folder back over to any office computer you want.

2) Open the EMR Desktop (do not select a patient)

3) Select the top toolbar “Tools” option then “Export Patient(s) Folders(s)”

4) Reply “Yes” when prompted

Warning: Be careful and protect the exported data the same as you protect all your patient info.
5) Select your External Drive Letter using the drop down list

6) Review and **check all the options** carefully.
If you want the patient’s ledger History be sure to check “**Patient Ledger**” under Financial.
The Documents folder List allows you to check Folders you **DON’T** want exported

---

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
8) Be sure to set the Doctor Number to “00”.

9) If you don’t fill in the “Num of Accts to Process” field, it will default to All patients.

We highly recommend exporting them in groups of 1000 patients at a time. For example if your highest account number was 3434, you could export with field values of:
- Re-Start Acct Number: 1  Num Accts to Process: 1000
- Re-Start Acct Number: 1001  Num Accts to Process: 1000
- Re-Start Acct Number: 2001  Num Accts to Process: 1000
- Re-Start Acct Number: 3001  Num Accts to Process: 1000

10) Click the Red “Export” button, and repeat this step for each range of account numbers you specify in step 9 above. **Note**: depending on the amount of Patients this could take multiple days to complete, that’s why we recommend in doing the patients in batches of 1000 at a time.

11) Remember, once you are 100% done with all patients you could copy the folder named with your practice name back to any office computer you wish.

12) All the files created should be able to be opened using Windows, PowerSoftMD will not be needed to access them.

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.
Export CCDA’s (Meaningful Use Users)
Meaningful Use software users can create a CCDA xml file for each patient with signed SOAP notes.

1) From the Primary Menu select the EMR Drop Down Arrow and then MU Central.

2) On the MU Central Menu, select Export CCDA’s

Warning: Be careful and protect the exported data the same as you protect all your patient info.
3) Check both check boxes, use **Set Output Location** to change the output folder location, then click the Red Run button.

**Note:** depending on the amount of Patients this could take multiple days to complete.

---

**Warning:** Be careful and protect the exported data the same as you protect all your patient info.