ChartMaker® DIY Data Transition Option - On Prem

Transitioning Your Data

When your practice is:

- Switching to another certified EHR
- Closing the practice
- Merging with another practice

… it is your responsibility to retain your clinical and financial data. Please review the options below to determine the best approach for your practice. If you are terminating any monthly or annual services, completion of a **Termination Checklist** is required.

Data Retention Guidelines

Clinical Data

- Adult patients: 10 years from date last seen
- Minor patients: 28 years from date of birth
- Deceased patients: 5 years from date of death

Financial Data

- CMS requires a minimum 3-year retention
- For IRS audit purposes, 7 years is recommended

Termination Checklist Instructions

If discontinuing services, complete the **STI Termination Checklist**:

1. Visit sticomputer.com
2. Navigate to Client Tools > STI Termination Checklist
3. Choose either:
    - ASP (Cloud) Termination, or
    - Client Server Termination (if you have an on-prem server)

4. Submit the form after filling in all required fields.

Services eligible for online termination include Software Support, Portal Fees, Managed Services, and RCM Billing, ASP Monthly Fee.

DIY Data Export Option for On-Prem Office

🔧Do-It-Yourself Export Methods

(ChartMaker version 6.8.6 or higher) *This option is intended for practices that are moving to another EHR and want to move their data from Clinical and import into the new EHR*.

1. Mass Export of Patient Summary Information (CCD Files)
    - Found in **ChartMaker Clinical > Chart > Export > Transition of Care All Patients**
    - Exports individual CCD files in XML format for all active patients.
    - File name format: LastName_FirstName_ChartNumber.xml
    - Includes demographics, medications, diagnoses, allergies, and more.
    - Compatible with all certified EHR systems that support HL7 C-CDA.
    - Everyone must be out of Practice Manager and Clinical until the process completes. Depending on the size of the database, it may take days, and in some cases longer than a week.
    - If there is an interruption, such as a power outage or server reboot, the process must start over.
    - See **On Prem Export Transition of Care All Patients**.
    - **DIY Sample - Mass Export of Patient Summary Information (CCD Files)**
    - **DIY Sample - Import of Patient Summary Information (CCD File) into EHR**
    - **More info on this export format is available here**.

2. Electronic Health Information Export
    - Found in **ChartMaker Clinical > Chart > Export > Electronic Health Information Export**
    - Exports patient data in machine-readable format plus a FHIR document and chart images (JPG) — each page of a multi page document will be exported as an individual JPG file (**see examples**).
    - Supports individual or full population export.
    - For full export, this process consumes significant storage space
    - See **On Prem EHI Export Guidelines**.
    - **DIY Sample - Electronic Health Information Export**
    - **More info on this export format is available here**.

3. Patient Demographics and Financial Reports (PDF/CSV)
    - Run and export from Practice Manager in PDF or CSV format

Contact Information

For assistance or more information, please contact: **frederick.polito@azaleahealth.com**