ChartMaker® Data Transition Options - 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.

Data Export Options for On-Prem Office

The data export options available are: **Assisted Export Services (via Azalea Health)** and **Extended Data Access**, with other self-service options available upon request.

🧰 Assisted Export Services (via Azalea Health)

(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.

Option 1 – Comprehensive Export

Includes the following for entire patient population·Patient documents (PDF) - a multi page document will be exported as a single PDF file

- Patient documents (PDF) – a multi page document will be exported as a single PDF file.
- Native format files (e.g., Word docs).
- CCD files.
- 3 years of patient-level financial history.
- CSV exports of system/patient data: locations, providers, insurance payers, fee schedule, appointment reasons and resources, demographics, insurance policies, appointments, recalls.

⏳ *Document export may take weeks depending on data volume; CSVs can be expedited.*

💲 **Cost is based on the size of the database**: $7,500 (less than 5GB) / $15,000 (up to 10 GB) / $22,500 (10GB or higher)

Learn more about the ChartMaker Data Export Format and what is included.

Option 2 – CSV Export Only

Includes the following for entire patient population:

- System and patient-level data in CSV format: locations, providers, insurance payers, fee schedule, appointment reasons and resources, demographics, insurance policies, appointments, recalls.

💲 **Cost**: $1,500

Learn more about the ChartMaker Data Export Format and what is included

📁 Extended Data Access

Azalea offers an optional **read-only hosting service** to retain access to your ChartMaker Medical Suite (Clinical and Practice Manager) data and documents. Your data will be transitioned from the ChartMaker Medical Suite application to the Azalea Health application in a read-only version.

- Data is migrated to a read-only version of Azalea Health's application.
- Your office will be given access to the eLearning tools. Customer Support will provide limited support.
- Monthly fee applies ($250/month per database).
- Ideal for practices that need temporary access post-transition.
- Can be used alongside the other export data transition options.

💲 Cost: $250/month per database

Contact Information

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