EHI Export - How to Enable, Configure and Run - On-Prem

****Please Note, your office must be on the latest version of ChartMaker Medical Suite.****

1. **Enable EHI Export:** Go to **Edit** > **Preference** > **Advanced** and complete the following:

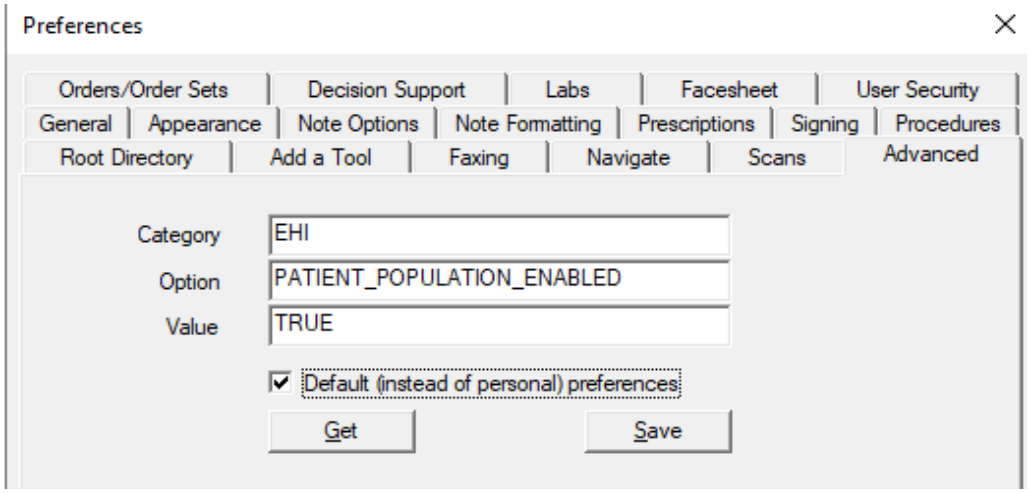
   Category: **EHI**

   Option: **PATIENT_POPULATION_ENABLED**

   Value: **TRUE**

   Check the **Default (instead of personal) preferences** checkbox.

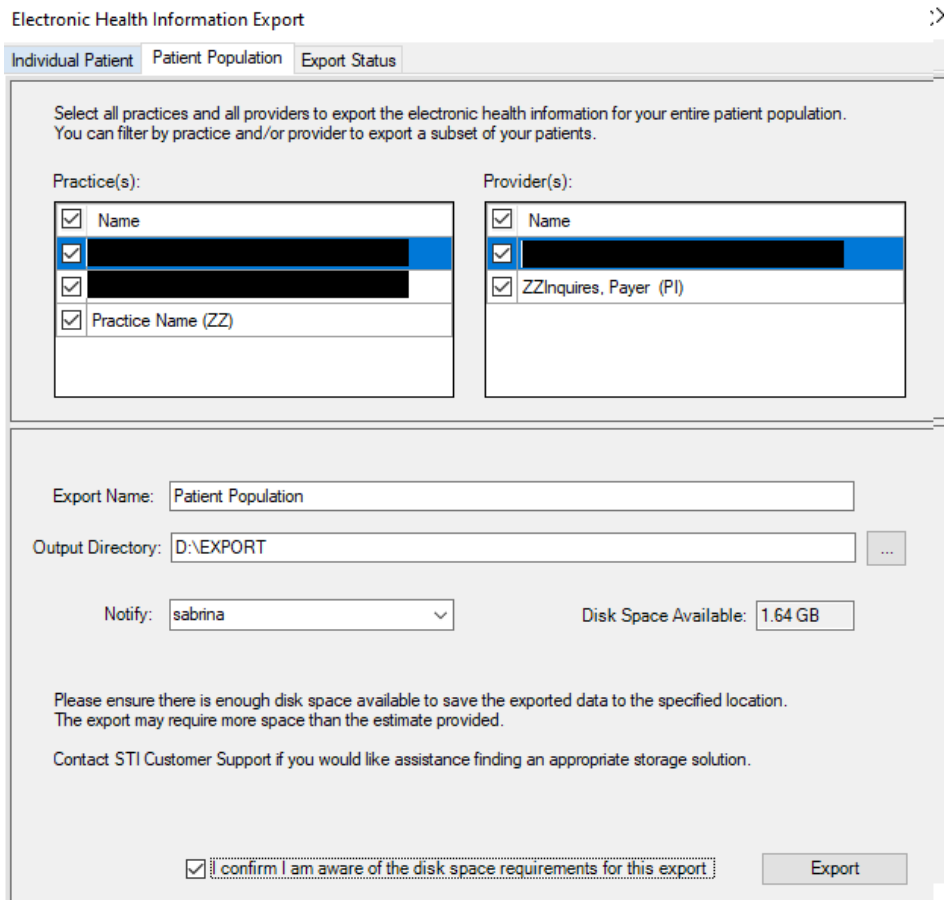
   Click **Save**, and then **OK.**



2. Configure Parameters: Go to **Chart > Export > Electronic Health Information Export > Patient Population Tab**.

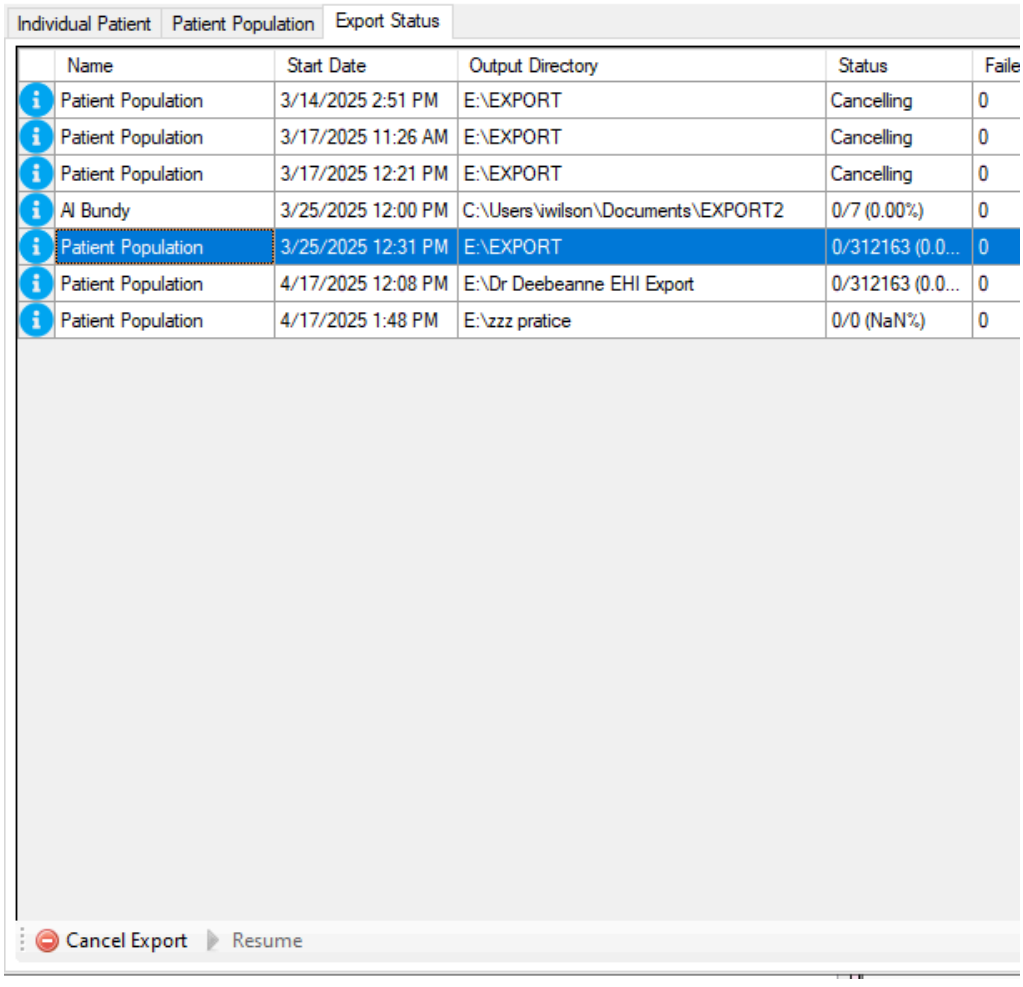
- Practice(s): select the practice. Recommend to select only one practice at a time.
- Provider(s): select provider(s). Recommend to select only one provider at a time for larger offices.
- Export Name: Defaults to Patient Population - do not change.
- Output Directory: browse out to the Drive letter where you want to save your exported EHI data. It will automatically create a folder called Patient Population.
- Notify: select a user to get a notification on their ToDo list when the exporting is completed.
- Disk Space Available: estimated space available for the process to complete.
- Check the box to acknowledge you are aware of the disk space requirements for this export. Recommend you confirm with your hardware support team.
- Export: select to start the process. You will receive an **Export started** pop-up.

Clinical is not required to stay open in order for the EHI to export. You may exit the program at any time.



3. Export Status: Go to Chart > Export > Electronic Health Information Export > Export Status Tab

- Under the status column, it will display "**cancel export**"- this means it is running and if you hover over the name, you can see the percentage completed.
- Give the percentage some time to show up, it will take a lot of exporting before you see it moving because of how much data is contained in the files.
- Anything under the Failed column are notes that were deleted from the patient's chart. Sometimes notes are "broken" and to clear this up, the note is deleted. Your office would have reached out to Support for assistance. The deleted note will be tagged as failed. This is not something you need to be concerned about.
- Once the export process is completed, the status column will show "Completed". The data has been exported and no further steps are required in Clinical.
- Do not select the Cancel Export option - this is for the Support department as needed.



4. When an export has completed the exported files will be in the designated Output Directory. The system will also track in the Audit Trail when a Patient Population export has completed, as well as if an export was canceled and/or resumed. Additionally, a To-Do List message will be sent to the applicable user if the export stops due to a lack of disk space.

5. The files are saved using the patient's account number. To easily reference the information, create a full clinical patient list report. See **On-Prem Clinical Full Patient List Report**.