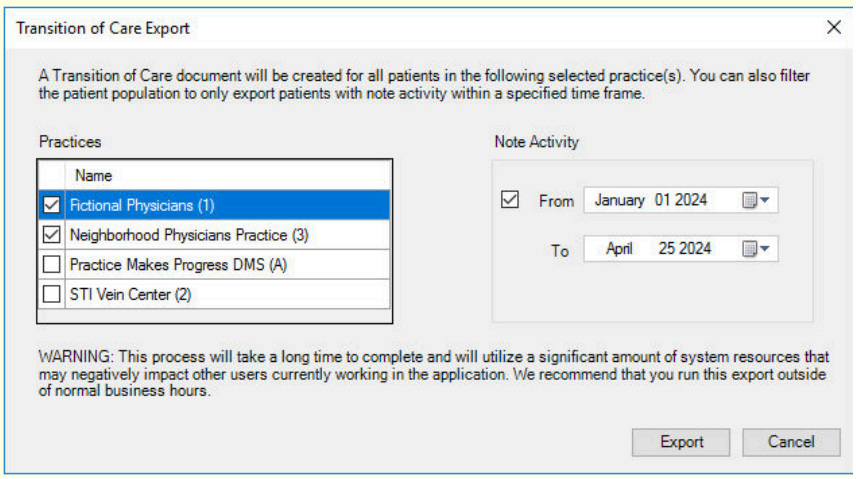
Export Transition of Care All Patients - On-Prem

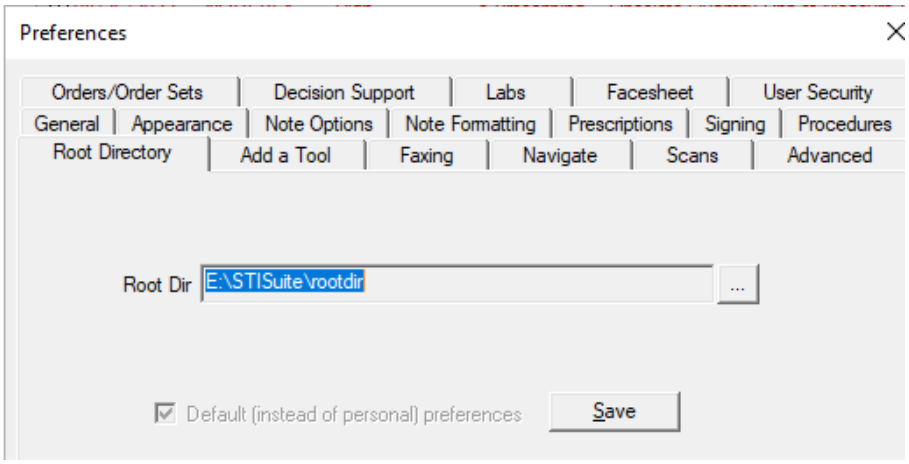
**** Your office must be on the latest version of ChartMaker Medical Suite.****

The Transition of Care Export dialog allows you to export Transition of Care (TOC) documents for all patients for a selected practice and for a Note Activity date range. When selecting **Chart** > **Export** > **Transition of Care All Patients**, a new Transition of Care Export dialog will appear allowing you to select which Practices to export TOC documents for, as well as the ability to select a specific time frame for Note Activity. Use the following steps to export a Transition of Care for all patients.

1. Click **Chart > Export > Transition of Care All Patients**.
2. In the **Practices** section of the Transition of Care Export dialog, select the **Practices** that you want to export TOC documents for. All practices will be selected by default upon entering the dialog. If there is only a single practice that the user is associated with, it will be checked, and the selection ability will be disabled.
3. To only gather patients that were active for a particular date range, check the **Note Activity** option, and then configure the applicable **From** and **To** date. If a Note Activity date range is not selected, the entire patient population will be exported for the selected practices. If a date range is selected, then only patients for the selected practice(s) that have a note in their chart with activity within that time-frame will be exported.
4. Click the **Export** button. The system will query the database for any patient that meets the configured criteria and a TOC document will be exported for each of those patients.



5. To locate your Transition of Care folder, you need to know where it is stored. Click **Edit** > **Preferences** > **Root Directory**. Note if your office has multiple practices, each Root Directory location will be different.



6. Everyone must be out of Practice Manager and Clinical until the process completes. Depending on the size of the database, it may take days, or in some cases longer than a week.

7. **If there is an interruption, such as a power outage or server reboot, the process must start over.**