

DATA EXPORT & RETRIEVAL SERVICES

Safeguarding your data is critical to us, which is why we store everything encrypted in AWS complete with all the security, redundancy, and backups you would expect from a 21st century cloud provider. While we securely manage your information, it is always your data.

Should the need arise to export your data, we have outlined multiple options with details.

SINGLE PATIENT EXPORT OPTIONS

AdvancedMD allows a user to export electronic health information (EHI) for a single patient within the system at any time without developer assistance using the file formats displayed below.

Patient Transaction Report

Export a .CSV file using the Patient Transaction Report found in PM Report Center.

Header data includes: Patient, Chart number, Address, Birthdate, Responsible Party, Phone, Email, Provider, SSN, Sex, Insurance (Primary, Secondary, Tertiary).

Body data includes: Transaction Type, Visit Number, Facility Name, Provider, Charge Code, Transaction Code, Transaction Code Description, Modifiers, Visit Primary, Visit Secondary, Transaction Carrier, Primary Diagnosis, Payment Method, Check Number, Date of Service, Date of Entry, Date of Deposit, Void, Units, Charges, Patient Payments, Insurance Payments, Total Payments, Adjustments.

From the Practice Management, go to Reports > Patient Listings > Patient Transaction Report.

Patient Visit Summary Report

Export a .CSV file using the Patient Visit Summary Report found in the PM Report Center.

Header data includes: Patient, Birthdate, Chart #, Email

BULK PATIENT EXPORT OPTIONS

AdvancedMD allows a user to export electronic health information (EHI) for bulk patient export within the system and with developer assistance using the file format displayed below.

Practice Management Data Export

This export is produced as a Microsoft Access database file which can be accessed or imported using a variety of tools.

The exported data will always include demographics data, and the user might also choose to export transactions and appointment data. The exported file includes charges, payments, and write-offs, as well as patient demographics, provider, appointments, and carrier information.

Go to Utilities > Data Export to run the export.

Body data includes: Visit Number, Date of Service, Charge Code, Charge Code Description Claim Charge Code, Claim Charge Code Description, CPT Code, CPT Code Description, Diagnosis Codes, Modifiers, Place of Service, Carrier, Copay, Current Balance, Billing Provider, Group Name, Provider Name, Facility Name, Facility Code, Appointment Status, Appointment Date, Appointment Time, Appointment Type,

From the Practice Management, go to Reports > Patient Listings > Patient Visit Summary.

EHR Data Portability Export Tool

Export a C-CDA XML File using the EHR Data Portability Export Tool. Data includes elements supported within the USCDIM set to include:

Allergies, Adverse Reactions and Alerts, Medications, Problems, Procedures, Results, Medical Equipment, Vital Signs, Assessments, Plan of Treatment, Goals, Health Concerns, Consultation Note, History and Physical Note, Progress Note, Discharge Summary, Imaging Narrative, Pathology Narrative, Immunizations, Reason for Referral, Functional Status, Mental Status, Encounters, Social History, Care Team Information, Advance Directives.

From the EHR, go to Tools > Data Portability Export Tool. An XML and HTML file is included in the export. The HTML file is provided as an optional supplement to the C-CDA XML. The data in the HTML is the same as the C-CDA

XML however it can be viewed by using a web browser such as Google Chrome.

Important Resources

- [C-CDA Implementation Guide: An XML file following the HL7 CDA Release 2 specification](#)
- [AdvancedMD Data Export C-CDA/HTML Data Dictionary](#)

EHR Patient Chart Print Tool

Export PDF documents including items from the patient chart such as clinical notes, word merge summaries, and messages using the EHR Patient Chart Print Tool.

Choose to include Demographics, Insurance, Patient Allergies, Problems List, Immunization History, Risk Factors, Advanced Directives, Misc Info Note, Audit Trail, Messages, Annotations, Healthwatcher Items, Education Lists, Patient Portal and Staff Messages, Current and Historical Medications, Orders/ Tests, Appointments, Documents Saved to Chart, Results and Patient Notes.

With the patient chart open, locate Chart Print from the Chart Tool icons.

Scanned Documents & Images

This is an export of all the documents and images that you've scanned into AdvancedMD Practice Management and EHR. This export is put in a folder structure with the documents and images sorted by date. You would also get index files to point you to each file, as well as tell you who the file is for and what kind of file it is. This export retains the files in their native format, so they could be viewed or printed from the file system. The index file allows IT staff to know how they might import these files into another system.

Developer assistance is needed for this export. Contact Client Support Services for details.

EHR Data Export

This is an export that will give all of the clinical data in the EHR with regards to allergies, immunizations, messages, diagnoses, problems, prescriptions, lab results, notes, and Word Merge templates. The data is stored in a SQL database (.bak file).

A conversion is needed to restore the database in SQL Server Management Studios.

Developer assistance is needed for this export. Contact Client Support Services for details.

Important Resources

- [AdvancedMD Bulk Data Export Data Dictionary](#)
- [AdvancedMD Bulk Data Export Scanned Doc/Images Guidance](#)