

## NextGen® Office Data Extraction

(Effective January 2024)

The following instructions outline how you can extract your data prior to termination of the NextGen® Office solution.

It is **your** regulatory obligation to retain your patient and practice data. Access to your data, and the ability to extract a copy thereof, is available to you throughout the Service Term. **HOWEVER, YOU MUST EXTRACT YOUR DATA FROM THE SYSTEM PRIOR TO THE DATE OF TERMINATION OR EXPIRATION OF THE AGREEMENT\***; as upon termination or expiration of the agreement under which you obtained access and use of the NextGen® Office solution:

- (A) Your right to access and use: (i) the NextGen® Office solution, (ii) any related functionality, and (iii) all Data residing therein immediately terminates.
- (B) You must, at your expense, remove and delete all copies of any Plug-In Software, if any, previously loaded onto your systems.
- (C) Company commences deleting your Data from our system.

**(\* Please note that abandoned accounts will automatically be deemed terminated and subject to the above processes.)**

Currently the NextGen Office solution provides three methods, within the solution itself, for you to extract your data on your own, at no additional charge:

**Option 1 - C-CDA Export:** The easiest, and free, option is to export ONC compliant C-CDA files. This can be done in bulk, for all patients, directly from the admin section of the PM system. This will produce a Patient Health Record (PHR) XML format file formatting to C-CDA standards for ALL patients in the system. The C-CDA files meet ONC specifications in providing a portable format with clinical history (problems, allergies, medications, vitals, care plans, etc.) that can be viewed in an ONC compliant EMR system. However, it does NOT include encounter notes or any documents/attachments. **(see below for instructions)**

**Option 2 - Print Chart Wizard:** Also free, but more labor intensive, is the "Print Chart" wizard. This will produce a single PDF containing the entire contents of that patient's chart - not just the PHR but all encounter notes, documents/attachments etc. It essentially gives you everything that is associated with that patient chart, including copies of all attachments, PDF's, scanned images etc. and outputs it as a single comprehensive PDF file. It can only be done one patient at a time. **(see below for instructions)**

**Option 3 – Single Patient EHI Export** – An EHR Admin end user profile can perform a single patient EHI export. The export will include encounters that have not been signed by the provider. **(see below for instructions)**

- The export will contain the following information:
  - PHR C-CDA file for each patient
  - CCDA
  - CSV for financial and appointment data, patient messages
  - Binary data such as images and PDFs \*This is for the entire practice, not just one provider
  - Encounter PDFs \*\*Does not include demographic data

In addition to the three, free self-managed methodologies outlined above, the Company offers a paid service option for data extraction in which the Company will perform, *at an additional charge*, the data extraction as follows:

**Option 4 – Bulk EHI Export:** For a fee, the Company can provide the Download My Patient Records service, which produces a backup of all patient records to a SFTP folder. The site will contain the following information:

- PHR C-CDA file for each patient
- CCDA
- CSV for financial and appointment data, patient messages
- Binary data such as images and PDFs \*This is for the entire practice, not just one provider
- Encounter PDFs \*\*Does not include demographic data

Once the extraction is done, you will promptly receive instructions and credentials to access the data. You must move your data from the SFTP folder within 30 days. Your sales executive will discuss pricing if you wish to learn more.

If you would like to utilize Option 4, then **prior to any termination/expiration of the Agreement**, you must:

- Fill out our online form (reason for cancellation) [here](#).
- Create an ASR (accounting) case in the Company's Success Community (contact support at 877-523-2120 if you need help).
- The case will be sent directly to accounting, who will reference your signed contract on file and make the appropriate adjustments. They can also notify you via your case with the last charge/access dates for that account.

Below you will find a helpful check list and instructions for Options 1, 2, and 3. If you have any questions about either of the step-by-step instructions below, please feel free to call customer support at: [\(877\) 523-2120](tel:8775232120). In addition to the above, we have also included some instructions for running a Patient Demographics Report.

Checklist:

1. BEFORE YOU TERMINATE YOUR ACCOUNT – REVIEW PENDING PAYMENTS



- Determine if you have any pending payments that need to be applied
- Under the Billing tab: Select “Payments”, then “View Unapplied Insurance Payments”, and then View Unapplied Patient Payments
- Sign all your open encounters, and apply all your payments
- Recommended that all billing and adjustments are done 45-days or more prior to canceling
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2. DOWNLOAD YOUR DATA



- Export CCDA Patient Records: Under the “Admin” tab select “Export CCDA Patient Records” (\*Note: All encounters must be signed off for them to be included in the CCDA export)
- Download your ERAs: Under the “Billing” tab select “Electronic Remittance Advice (ERA)”, enter a 30-day date range, and then click “Download All PDF” or “Download All 835.”

3. REPORTS – SUGGESTED PRACTICE MANAGEMENT



- Patient Demographic Report: Under the “Report” tab choose “Demographics” and then “Patient”
- Accounts Receivable Report: Under the “Report” tab choose “Accounts Receivable” and then “ AR Service Line-Analysis Gride (AR Type: All Service Lines)
- Insurance Report: Under the “Report” tab choose “Demographics” and then “Patient Insurance Guarantor-Analysis Grid”
- Appointment Report: Under the “Report” tab choose “Appointments” and then “Appointments-Analysis grid”
- Payment Report: Under the “Report” tab choose “Payments” and then “Payments-Analysis Grid”

NOTES:

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**Option 1 - C-CDA Export:**

**Export CCDA Patient Records**

The Export CCDA Patient Records feature allows users to generate Export CCDA patient record files, to view files that have already been generated, and to delete files.

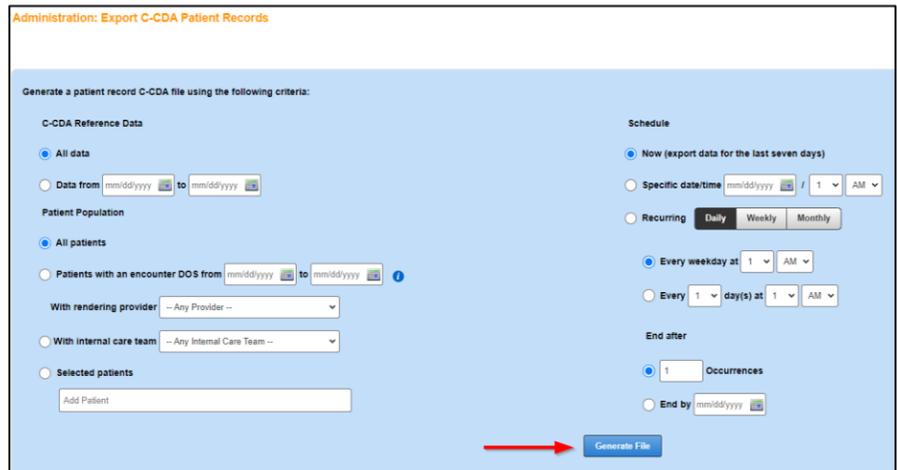
1. Select "Export CCDA Patient Records" from the "Admin" page.

**\*Note: You must sign off on all encounters that you wish to be included in the C-CDA**



**You have two options here:**

- A. Click "Generate Export CCDA File" to create a new Export CCDA file.
- B. Select "All Patients" or "Patients with an Encounter From," select the date range by manually entering the dates or selecting them from the calendar icons and select the rendering provider.



- A. Click the file name below to download the Export CCDA file.
- B. Click the trash icon to permanently delete the file and click "OK" in the popup to confirm.

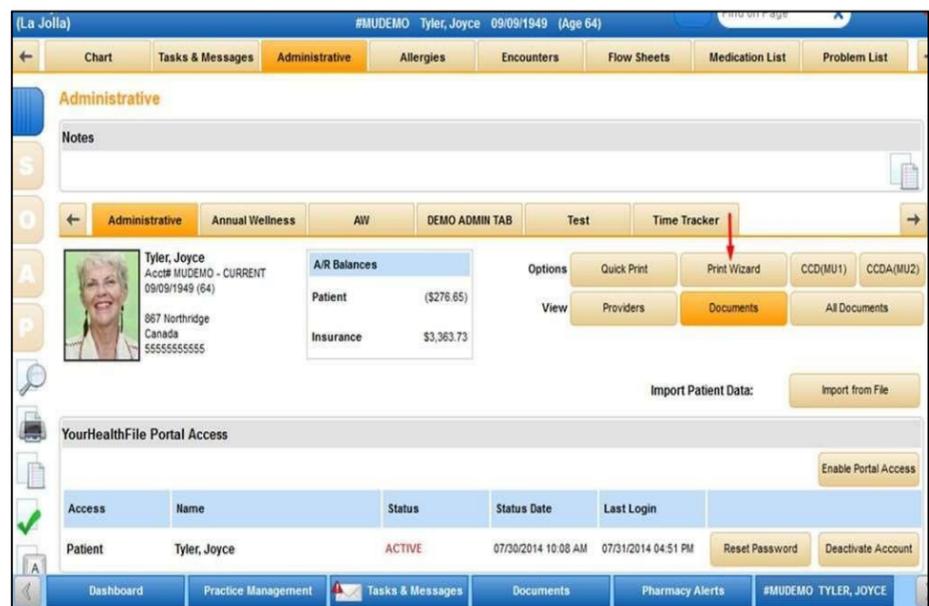


**Option 2 - Print Chart Wizard:**

**Patient Chart: Print Wizard**

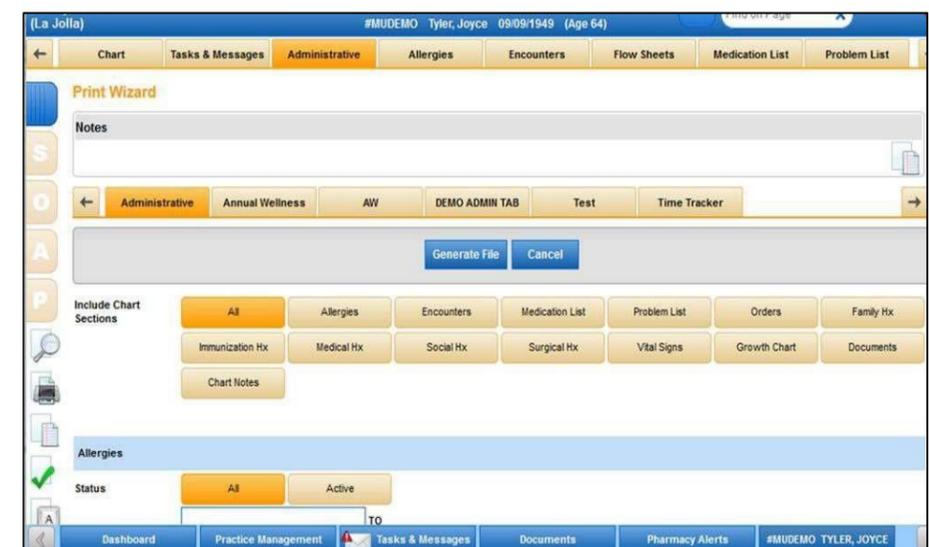
- 1. Search your patient's name.
- 2. Select the patient chart.
  - a. Select the "Administrative tab"
  - b. Choose "Print Wizard"

**\*Note: The "Print Wizard" is an extremely helpful tool that allows users to generate a PDF file containing a variety of information documented from the patient's chart.**



- 3. Enter information and select date ranges or choose "All".
- 4. Select "Generate File"

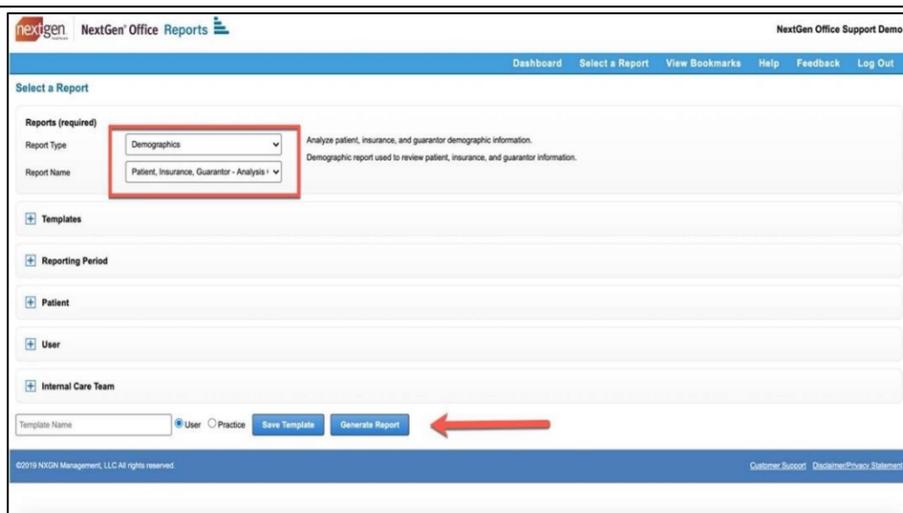
**\*Note: The file is located in "Documents," located within the "Administrative" tab, where the user is able to download, or preview. It may take several minutes to see the file after you've selected "Generate File".**



### Patient Demographics Report:

This report will only export the demographics.

1. Under Reports
2. Choose Demographics under Type and Patient under Report.
3. Choose Generate Report and it will download the report.

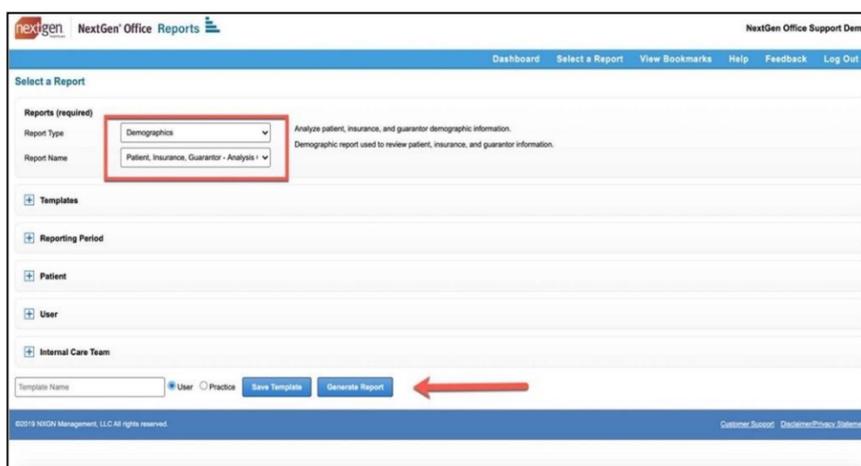


### Practice Management Only Clients:

Reports to run (PM ONLY)

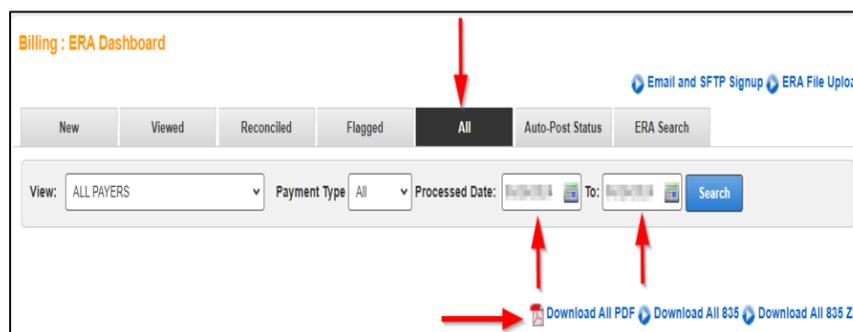
#### Reports:

1. Accounts Receivable:
  - a. AR Service Line-Analysis Grid (AR Type: All Service Lines)
2. Demographics:
  - a. Patient Insurance Guarantor-Analysis Grid
3. Appointments:
  - a. Appointments-Analysis Grid
4. Payments:
  - a. Payments-Analysis Grid



### How to Download your ERAs

1. Go to Billing
2. Select Electronic Remittance Advice
3. Select All
4. Enter a 30-day date range.
5. Click Download All PDF or Download All 835



**Single Patient EHI Export:**

<p><b>Export EHI:</b></p> <ol style="list-style-type: none"> <li>1. Log into NGO with EHR ADMIN User</li> <li>2. Go to Admin – Access ‘Export EHI Patient Export’</li> </ol>	<table border="1"> <tr> <th style="background-color: #e1f5fe;">EHR Setup</th> <th style="background-color: #e1f5fe;">Patient Portal Management</th> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• Allergies</li> <li>• Care Plans</li> <li>• Chief Complaint Forms</li> <li>• Consult</li> <li>• Custom Forms</li> <li>• Diagnosis Panels (ICD9)</li> <li>• Diagnosis Panels (ICD10)</li> <li>• Document Types</li> <li>• Drug Interaction Alerts</li> <li>• DME Setup</li> <li>• EHR Reporting and Quality Measures</li> <li>• Export C-CDA Patient Records</li> <li>• <b>Export EHI Patient Records</b> ←</li> <li>• Facilities</li> <li>• Fax Numbers</li> <li>• Group Reporting</li> <li>• Internal Care Teams</li> <li>• Medications</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>• Patient Messaging</li> <li>• Show Unreviewed Order Results in Patient Portal</li> <li>• Patient Survey Results</li> </ul> </td> </tr> <tr> <td></td> <th style="background-color: #e1f5fe;">Premium Portal Management</th> </tr> <tr> <td></td> <td> <ul style="list-style-type: none"> <li>• Enable &amp; Disable Features</li> <li>• Calendar Management</li> <li>• Custom Check-in Processes</li> <li>• e-Visit Setup</li> <li>• New Patient Self Registration and Scheduling</li> <li>• Patient Portal Announcement</li> <li>• Patient Portal Co-branding Setup</li> <li>• Patient Registration Documents</li> <li>• Rx Refill Requests</li> </ul> </td> </tr> </table>	EHR Setup	Patient Portal Management	<ul style="list-style-type: none"> <li>• Allergies</li> <li>• Care Plans</li> <li>• Chief Complaint Forms</li> <li>• Consult</li> <li>• Custom Forms</li> <li>• Diagnosis Panels (ICD9)</li> <li>• Diagnosis Panels (ICD10)</li> <li>• Document Types</li> <li>• Drug Interaction Alerts</li> <li>• DME Setup</li> <li>• EHR Reporting and Quality Measures</li> <li>• Export C-CDA Patient Records</li> <li>• <b>Export EHI Patient Records</b> ←</li> <li>• Facilities</li> <li>• Fax Numbers</li> <li>• Group Reporting</li> <li>• Internal Care Teams</li> <li>• Medications</li> </ul>	<ul style="list-style-type: none"> <li>• Patient Messaging</li> <li>• Show Unreviewed Order Results in Patient Portal</li> <li>• Patient Survey Results</li> </ul>		Premium Portal Management		<ul style="list-style-type: none"> <li>• Enable &amp; Disable Features</li> <li>• Calendar Management</li> <li>• Custom Check-in Processes</li> <li>• e-Visit Setup</li> <li>• New Patient Self Registration and Scheduling</li> <li>• Patient Portal Announcement</li> <li>• Patient Portal Co-branding Setup</li> <li>• Patient Registration Documents</li> <li>• Rx Refill Requests</li> </ul>
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<ol style="list-style-type: none"> <li>3. Search for Patient</li> <li>4. Select Generate Export File</li> </ol>	<p><b>Administration: Export EHI Patient Records</b></p> <div style="background-color: #e1f5fe; padding: 10px; border: 1px solid #ccc;"> <p><b>Generate a patient EHI file:</b></p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%; margin-bottom: 10px;">             Select Patient           </div> <div style="text-align: right;"> <div style="background-color: #4285f4; color: white; padding: 5px 15px; border: 1px solid #ccc; display: inline-block;">               Generate Export File             </div>             ←           </div> </div>
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