

NextGen® Office Data Extraction

(Effective January 2026)

POLICY

It is Client's obligation to retain Client patient and practice data. Client access to Client Data, and the ability to extract a copy of such data, is available throughout the Service Term.

Client must extract all Client Data, including patient data and audit logs, from the NextGen Office® solution prior to the termination or expiration of the applicable Agreement. As set forth in the Master Services Agreement and Business Associate Agreement (collectively, the "Agreement"), upon termination or expiration of the Agreement:

- (A) Client's right to access and use (i) the NextGen Office® solution, (ii) any related functionality, and (iii) all data residing therein immediately terminates.
- (B) Client must, at Client's expense, remove and delete all copies of any plug-in software, if applicable, previously loaded onto Client's systems.

NextGen Healthcare ("Company") will purge all Client Data (including all electronic health information "EHI") it received on behalf of Client in accordance with the Agreement and this Policy. Client remains solely responsible for extracting all Client Data from the NextGen Office® solution prior to termination or expiration, as outlined in this Policy.

****Clients terminated for breach of the Agreement remain subject to the foregoing requirements.***

DATA EXTRACTION OPTIONS

The NextGen Office® solution provides multiple methods for Client to extract EHI and other Client Data without charge.

Self-Service Options:

Option 1 - C-CDA Export: The easiest 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 NextGen® Office PM system. This will produce a Patient Health Record (PHR) XML format file formatted to C-CDA standards for all patients in the system. These C-CDA files provide a standardized summary of a patient's health information—such as medications, allergies, conditions, and vital signs—that can be shared and viewed in ONC-certified electronic health record (EHR) systems. They do not include visit notes or attached documents. [\(see below for instructions\)](#)

Option 2 - Print Chart Wizard: The "Print Chart" wizard will produce a single PDF containing the entire contents of an individual patient's chart, including encounter notes and documents or attachments. It outputs a comprehensive PDF file for 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. The export includes:

- C-CDA file for each patient
- CSV files for financial, appointment, and patient messages
- Binary data such as images and PDFs (for the entire practice, not just one provider)
- Encounter PDFs (does not include demographic data)

[\(see below for instructions\)](#)

Company-Assisted Options: If Client elects to utilize Company-assisted extraction services prior to any termination or expiration of the Agreement, Client must create an ASR (accounting) case in the Company's Success Community (contact support at 877-523-2120 for assistance). Client must notify Company once Client has completed accessing the extracted data. **Access and billing under the Agreement will continue until Client notifies Company to terminate the Agreement, following completion of the extraction.**

Option 4 – Bulk EHI Export: Company can provide the Download My Patient Records service, which produces a backup of all patient records in a computable (machine readable) format to an SFTP folder. The SFTP folder will contain:

- C-CDA file for each patient
- CSV files for financial, appointment, and 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

DELIVERY and RETENTION

When Company provides a Company-assisted data extraction, Client will receive instructions and credentials to access the extracted data through a secure delivery method. Client is responsible for downloading and securely storing its data within the timeframe specified by Company, generally 30 days. Company is not responsible for Client's failure to retrieve data within the designated access period. Client is responsible for all costs related to downloading and storing their data from the SFTP folder.

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 exporting additional information.

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

2. DOWNLOAD YOUR DATA



- Export CCDAs: Under the “Admin” tab select “Export CCDAs” (*Note: All encounters must be signed off for them to be included in the CCDAs 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.”
- Export your user EHR Audit activity: In EHR > Documents > My Records > Audit Logs, enter a 30-day date range, then click “Generate Audit”, the file will be generated with 24 hours, and the file can be downloaded.

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 Grid (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:

- _____
- _____
- _____
- _____
- _____
- _____

Instructions:

Option 1 - C-CDA Export:

Export CCD A Patient Records

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

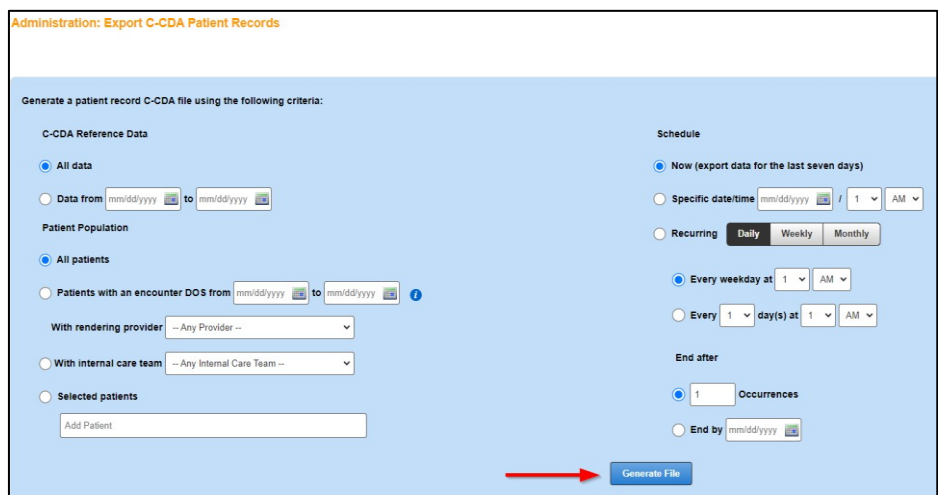
1. Select "Export CCD A Patient Records" from the "Admin" page.

***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 CCD A File" to create a new Export CCD A 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 CCD A file.
- B. Click the trash icon to permanently delete the file and click "OK" in the popup to confirm.

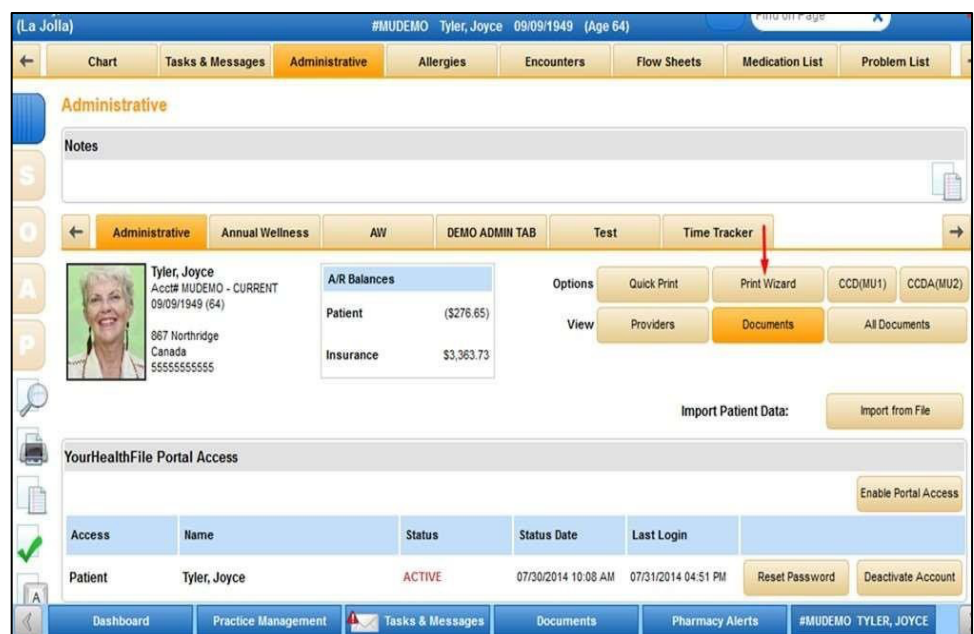
Scheduled CCD A Generation	Next Occurrence	Scheduled By	Scheduled On
Download Export		Exported By	Exported On
90052018_1458.ZIP (pending)		SupportDemo	Jun 5, 2018 2:20:39 PM
90062018_0617.ZIP		SupportDemo	Jun 6, 2018 6:17:54 AM
90012018_1548.ZIP		SupportDemo	May 1, 2018 3:48:42 PM
94232018_1456.ZIP		SupportDemo	Apr 23, 2018 2:56:13 PM
94042018_0720.ZIP		SupportDemo	Apr 4, 2018 7:26:46 AM

Option 2 - Print Chart Wizard:

Patient Chart: Print Wizard

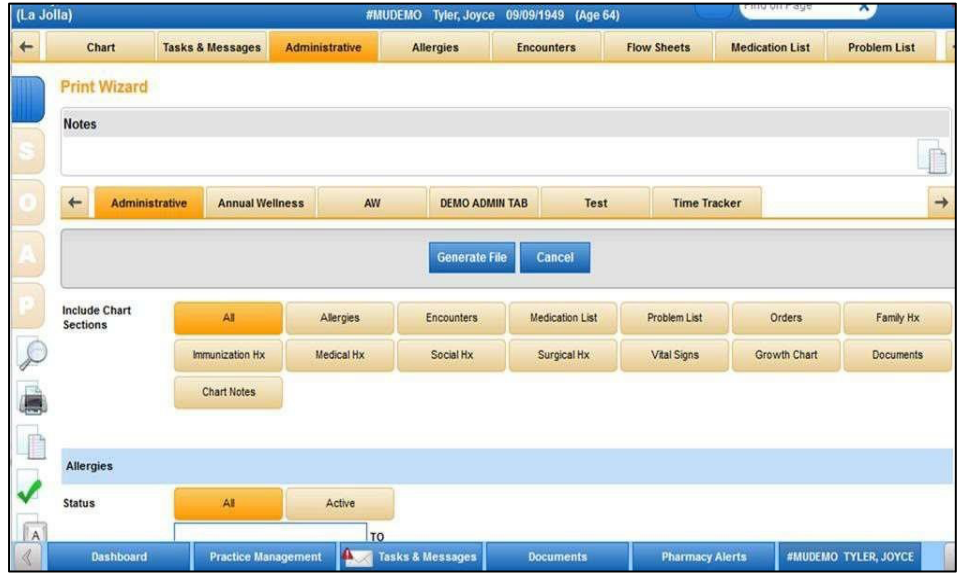
- 1. Search your patient's name.
- 2. Select the patient chart.
 - a. Select the "Administrative tab"
 - b. Choose "Print Wizard"

***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"

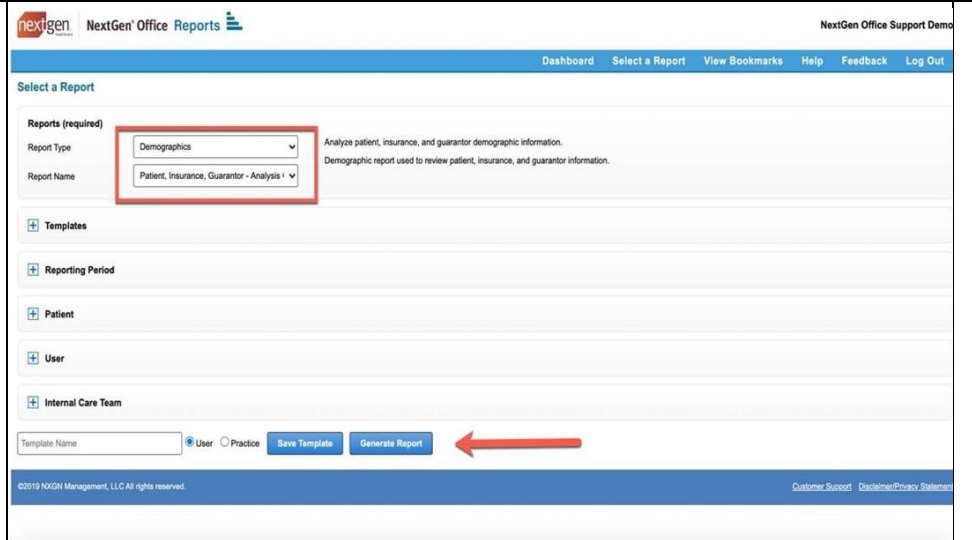
***Note: The file is located in "Documents," located within the "Administrative" tab, where the user is able to download, or preview. It may take several minutes to see the file after you've selected "Generate File".**



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.

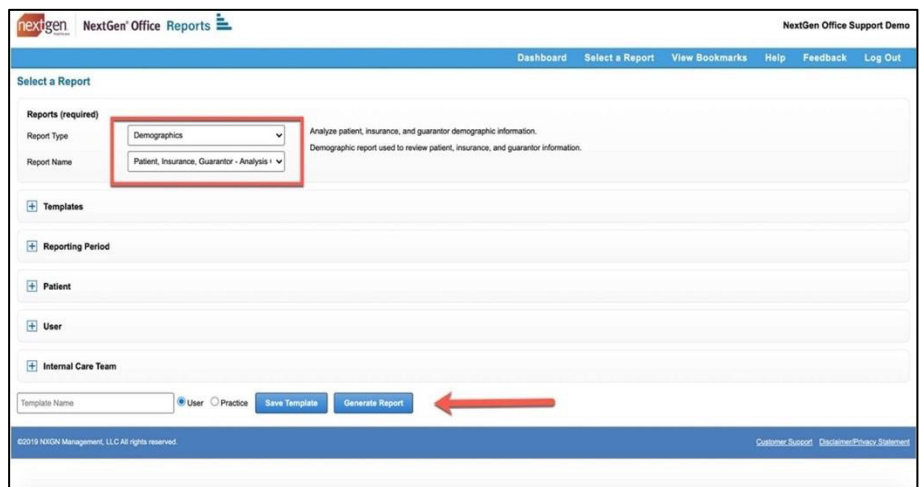


Practice Management Only Clients:

Reports to run (PM ONLY)

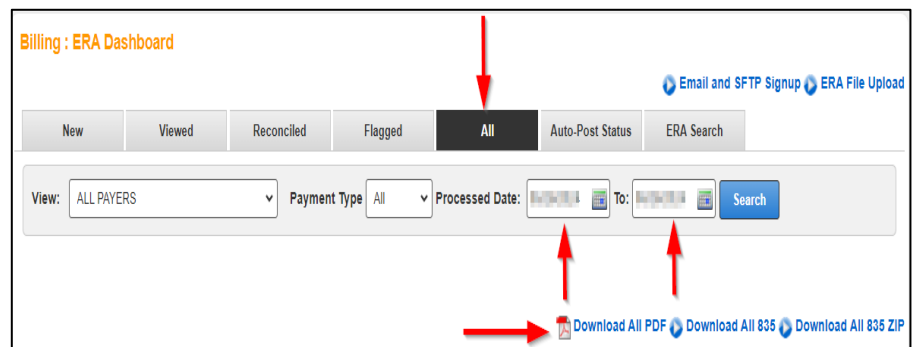
Reports:

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:

Export EHI:

1. Log into NGO with EHR ADMIN User
2. Go to Admin – Access ‘Export EHI Patient Export’

EHR Setup <ul style="list-style-type: none"> • Allergies • Care Plans • Chief Complaint Forms • Consult • Custom Forms • Diagnosis Panels (ICD9) • Diagnosis Panels (ICD10) • Document Types • Drug Interaction Alerts • DME Setup • EHR Reporting and Quality Measures • Export C-CDA Patient Records • Export EHI Patient Records ← • Facilities • Fax Numbers • Group Reporting • Internal Care Teams • Medications 	Patient Portal Management <ul style="list-style-type: none"> • Patient Messaging • Show Unreviewed Order Results in Patient Portal • Patient Survey Results
Premium Portal Management <ul style="list-style-type: none"> • Enable & Disable Features • Calendar Management • Custom Check-in Processes • e-Visit Setup • New Patient Self Registration and Scheduling • Patient Portal Announcement • Patient Portal Co-branding Setup • Patient Registration Documents • Rx Refill Requests 	

3. Search for Patient
4. Select Generate Export File

Administration: Export EHI Patient Records

Generate a patient EHI file:

Select Patient

Generate Export File ←