prognoCIS
By Bizmatics

§170.315(b)(10) Electronic Health Information export_Self Attestation Document

TABLE OF CONTENTS

Purpose

The purpose of this document is to describe PrognoCIS support for '2015 Edition Cures Updates Certification Program' criteria –
§170.315(b)(10) Electronic Health Information export'
ONC Compliance Date: Dec 31,2023

2015 Edition Cures Update Certification Requirements:

§ 170.315 (b)(10) *Electronic Health Information export-*

1. *Single patient electronic health information export.*

    1. Enable a user to timely create an export file(s) with all of a single patient's electronic health information that can be stored at the time of certification by the product, of which the Health IT Module is a part.

    2. A user must be able to execute this capability at any time the user chooses and without subsequent developer assistance to operate.

    3. Limit the ability of users who can create such export file(s) in at least one of these two ways:

        1. To a specific set of identified users

        2. As system administrator function.

    4. The export file(s) created must be electronic and in a computable format.

    5. The publicly accessible hyperlink of the export's format must be included with the exported file(s).

2. *Patient population electronic health information export*. Create an export of all the electronic health information that can be stored at the time of certification by the product, of which the Health IT Module is a part.

   1. The export created must be electronic and in a computable format.

   2. The publicly accessible hyperlink of the export's format must be included with the exported file(s).

3. *Documentation*. The export format(s) used to support paragraphs (b)(10)(i) and (ii) of this section must be kept up-to-date.

PrognoCIS Workflow

Single Patient Data Export :
A PrognoCIS user can perform an electronic health information (EHI) export for a Single Patient at any time the user chooses without developer assistance, can limit a set of users the ability to perform the export.

Patient population EHI Export :

Patient Population Data Export is handled by Bizmatics Data Migration Team as it depends on size of data, time and efforts required to manage the server resources.
The Data Migration Team monitors the progress of the process. The process completion notification is sent to Bizmatics Data Migration Team. The encrypted PHI data is stored on the ASP/Client server.

Data Filles exported :
- Includes EHI that can be stored at the time of certification by the product
- Are in electronic and in a computable format
- Includes a publicly accessible hyperlink of the export's format

Single Patient Data Export

PrognoCIS User with , *CuresEHIExport''* role can export Single Patient EHI any time the user chooses and without subsequent developer assistance to operate.

User Role, *CuresEHIExport* is present under the *Role (No Access Rights)* section of the *User Role* Master screen in PrognoCIS.
The *CuresEHIExport* User Role must be checked for a Provider, Medical Assistant, Office Staff or Clinical Staff user to enable the user to export data for Single Patient on *Export Patient Data* popup without password or any intervention.

When a user assigned with *CuresEHIExport* User Role logs into PrognoCIS the *Data Export* link is available, the *Single Patient* radio button is selected by default for such user.

Other enabled options on the popup include:
- Include Deleted Encounters (Use with caution)
- Reason for Data Export
- Check All and other listed checkboxes
- CONFIGURE
- CANCEL
- EXPORT

Disabled options on the popup include:
- All Patients
- Selected Patients
- Patients of Primary Provider
- Patients of Attending Provider
- Encounters of Attending Provider
- Patient Last name From-Upto
- Data Export for Patient from SQL file
- Encounter Date Range From and Upto
- Data Export Password

Clicking on the *Search* icon invokes **Patients** Search List with Active Patients in PrognoCIS. On selecting a Patient from this popup, the name of the Patient is shown in the grayed-out text field. A message is displayed beside the *Search* icon of this field all the time. This message reads: *(For All/Multiple Patients Data Export, please contact Bizmatics Support Team)*

User can select the checkboxes for the Type of Data to be exported and click on the *EXPORT* button. As *Data Export Password* field is disabled for the user with *CuresEHIExport* User Role assigned to them, validation to Enter Password is not shown on click of the *EXPORT* button. Instead, a confirmation message is directly shown in a popup which reads: *The Patient Data Export will be generated in the Background. User will be notified on mail when the report is generated.* Click on the *OK* button to close the confirmation popup.

Download Files :

Single Patient Data is exported under 'Download Files'
Navigate to Settings → Configuration → Clinic column → Download Files

A Category *Cures EHI Export* is present on the *Download Files* Master screen on the EMR side. The record for a file downloaded on exporting Single Patients is shown here. Files shown under this Category are of the .zip format. The *Comment* column of the record shows 'EHI Export'. On clicking the file hyperlink, a zip folder is downloaded in user's local Downloads folder. The downloaded zip folder contains exported data in .txt, .xls and .pdf formats.

Patient Population (All/Multiple) Data Export

Patient Population Data Export is handled by Bizmatics Data Migration Team as it depends on size of data ,time and efforts required to manage the server resources

Please contact Bizmatics Customer Support Team at support@bizmaticsinc.com to initiate the process.

Audit Trail

Single Patient and Patient Population Data Export action can be tracked in Audit Trail Reports

APPENDIX
DATA FORMATS

For Single or Patient Population encrypted Data Files/Folders are exported in following formats:

- **PHI without any documents attached**, data is exported in xls and .txt format

  - For example, for Allergy:
    Exported field list is - Last name, First name, Middle name, Chart no, Account no, Birth date, Allergy, Reaction, Type, Int Name, Status,Rxnorm

- **PHI with documents attached**, for example Lab Results, Rad Results, Old Progress Notes, Results, Letters, etc. the xls contains a specific column labeled "File" which contains the path of the respective document.

    For example, for Letters:

    Exported field list is - Last name, First name, Middle name, Chart no, Account no, Birth date, Letter Date, Outward (O) Inward (I), To Name, Subject, List of To Names, List of Cc Names, List of To and Cc Names, Status Code, Status Name, **FILE**

    For ex. CHART01/LETOut_99.pdf CHART01/LETIn_389.pdf

    Here, *CHART01* is the folder and the *LETOut_99* and *LETIn_389* corresponds to the physical file stored under the Folder *CHART01*.

- **CCD Export:** This includes Consolidated Cures CCD and data element xls includes column *HTML*, *XML* which contains path of that document.

    Exported field list is - - Last name, First name, Middle name, Chart no, Account no, Birth date, DOC_ID, Date, Provider, **HTML**, **XML**

Data Elements Types

User can select Data Elements to be exported from following list':

- Insurance Master
- Medics
- Referring Provider
- Adjusters
- Attorneys
- Employers
- Guarantor
- Patient Demographics
- Patient Insurance
- Vaccination
- Health Maintenance
- Family History
- Past Medical Hist
- Surgery
- Allergy
- Current Medication
- Social History
- Legal Documents
- Other Documents
- Enc Attach Docs
- Old Progress Notes

- Messages
- Future Appointments
- Vitals
- Diagnosis Codes
- CPT Codes
- Hcpc Codes
- CCD
- Prescriptions
- Lab Results
- Rad Results
- Procedure Orders
- Consults
- Enc Progress Notes
- Procedure Notes
- Letters
- All Vitals
- Lab Test Result Values
- Patient Cases
- Patient Notes
- Patient Alert
- Past Appointments

When Billing is turned on for the clinic then the following options are also shown -

- Billing Ledger
- Billing Claims
- Billing Charges
- Patient Advance
- Statements

Detailed Description of the Data Export Contents

1. **Insurance Master**

   This contains the insurance company details.

   Exported field list is -

   "ID, Insurance Company Name, Payer Id Unique, Address Line1, Address Line2, Address City, Address State Code, Address Zip, Address Email, Address Tel Office1, Address Tel Office2, Address Fax, Status, External Id Unique, ID for Company Unique, Contact Person, Name, Filing Indicator Code, Federal Tax Id, Address Tel Residence, Address Tel Cell, Address Single Line."

2. **Medics**
   Details of Active Medics of Type Providers (DR), Medical Assistant (MA), Clinical Staff (RN), Office Staff (ST) and Billing Staff (BL).

   Exported field list is -

   "ID, Type, First Name, Last Name, Middle Name, Qualifications, Specialty, NPI, DEA, UPIN, REGN, FTIN, Taxonomy Code, Taxonomy Name, Designation, Institution, Address Email, Address Tel Office1, Address Tel Office2, Address Tel Residence, Address Tel Cell, Address Fax, Address Single Line, Status, Display Name, External Id, Address Line1, Address Line2, Address City, Address State Code, Address Zip."

3. **Referring Doctor**

   This contains the referring provider details.

   Exported field list is -

   "ID, First Name, Last Name, Middle Name, Qualifications, Specialty, NPI, Institution, Address Line1, Address Line2, Address City, Address State Code, Address Zip, Address Email, Address Tel Office1, Address Tel Office2, Address Tel Residence, Address Tel Cell, Address Fax, Status, Display Name, External Id, DEA, UPIN, REGN, FTIN, Designation, Address Single Line."

4. **Adjusters**

Contains the adjuster's information.

Exported field list is -

"Id, Adjuster Contact Name, Address Email, Address Tel Office1, Address Tel Office2, Address Tel Residence, Address Tel Cell, Address Fax, Address Single Line, External Id Unique, Insurance Company Name, Federal Tax Id, Address Single Line, Address Line1, Address Line2, Address City, Address State Code, Address Zip, ID for Company Unique, Payer Id Unique, Contact Person Name, Filing Indicator Code, Address Line1, Address Line2, Address City, Address State Code, Address Zip, Address Email, Address Tel Office 1, Address Tel Office 2, Address Tel Residence, Address Tel Cell, Address Fax."

5. **Attorneys**

Contains the attorney's information.

Exported field list is -

"ID, Law Firm Name, Contact Person Name, Address Email, Address Tel Office 1, Address Tel Office 2, Address Tel Residence, Address Tel Cell, Address Fax, Address Single Line, Status, Address Line1, Address Line2, Address City, Address State Code, Address Zip."

6. **Employers**

Contains the employer's information.

Exported field list is -

"ID, External ID, Contact Person Name, Contact Person First Name, Contact Person Last Name, Designation, Insurance, Policy Number, Address Email, Address Tel Office 1, Address Tel Office 2, Address Fax, Address Single Line, Employer Business Type, Federal Tax Id, Invoice Email, Standard Payment Days, Status, Address Line1, Address Line2, Address City, Address State Code, Address Zip, Address Tel Residence, Address Tel Cell."

7. **Guarantor**

This contains the guarantor's information.

Exported field list is -

"Responsible Person Last Name, Responsible Person First Name, Responsible Person Middle Name, Responsible Person Account Number, Responsible Person Date Of Birth, Responsible Person Title, Responsible Person Gender, Marital Status, Responsible Person's Relationship with the patient, Patient Name, Patient Chart Number, Responsible Person Address Line1, Responsible Person Address Line2, Responsible Person Address City, Responsible Person Address State Code, Responsible Person Address Zip, Responsible Person Address Email, Responsible Person Address Tel Office 1, Responsible Person Address Tel Office 2, Responsible Person Address Tel Residence, Responsible Person Address Tel Cell, Responsible Person Address Fax"

8. **Patient Demographics**

This contains the patient's basic demographics information.

Exported field list is -

"Account Number, Title, First Name, Last Name, Middle Name, Date of Birth, Gender, Marital Status, Patient Short SSN, Status Code, Status Name, Patient Address Line1, Patient Address Line2, Patient Address City, Patient Address State Code, Patient Address Zip, Patient Address Email, Patient Address Tel Office 1, Patient Address Tel Office 2, Patient Address Tel Residence, Patient Address Tel Cell, Patient Address Fax, Primary Doctor Id, Primary Doctor Name, Emergency Contact, Relationship of patient with Emergency Contact Person, Emergency Contact Address Line1, Emergency Contact Address Line2, Emergency Contact Address City, Emergency Contact Address State Code, Emergency Contact Address Zip, Emergency Contact Address Email, Emergency Contact Address Tel Office 1, Emergency Contact Address Tel Office 2, Emergency Contact Address Tel Residence, Emergency Contact Address Tel Cell, Emergency Contact Address Fax, Name of the Employer, Referring Doctor Id, Referring Doctor Name, Spouse/Parent/Legal Guardian, Relationship with the patient, Employer of the Spouse, Short SSN of the Spouse, Date of Birth of the Spouse, ID in another system, Patient Chart Number entered as per clinic practices, Patients Race Ids Group Type RA, Responsible Person Name, Responsible Person Relation, Preferred Language, Ethnic Groups, Photo, Id, Display Name, Suffix, Nick Name, Patient Full SSN, Patient Address Single Line, Primary Doctor NPI, Primary Doctor Federal tax Id, Primary Doctor Taxonomy Code, Primary Doctor Specialty,

Emergency Contact Address Single Line, Employment Status, Referring Doctor NPI, Referring Doctor Federal tax ID, Referring Doctor Taxonomy Code, Referring Doctor Specialty, Full SSN of the Spouse, Primary Contact, US citizen, Patients Nationality, Patients Driving License, Patients Occupation, Religion, Date of Death, The source as from where the patient came to know, Primary Care Physician1 Title, Primary Care Physician1 ID, Primary Care Physician1 Doctor Name, Primary Care Physician1 Doctor NPI, Primary Care Physician1 Doctor Federal tax Id, Primary Care Physician1 Doctor Taxonomy Code, Primary Care Physician1 Doctor Specialty, Primary Care Physician2 Title, Primary Care Physician2 ID, Primary Care Physician2 Doctor Name, Primary Care Physician2 Doctor NPI, Primary Care Physician2 Doctor Federal tax Id, Primary Care Physician2 Doctor Taxonomy Code, Primary Care Physician2 Doctor Specialty, Primary Care Physician3 Title, Primary Care Physician3 ID, Primary Care Physician3 Doctor Name, Primary Care Physician3 Doctor NPI, Primary Care Physician3 Doctor Federal tax ID, Primary Care Physician3 Doctor Taxonomy Code, Primary Care Physician3 Doctor Specialty, Primary Care Physician4 Title, Primary Care Physician4 ID, Primary Care Physician4 Doctor Name, Primary Care Physician4 Doctor NPI, Primary Care Physician4 Doctor Federal tax Id, Primary Care Physician4 Doctor Taxonomy Code, Primary Care Physician4 Doctor Specialty, Primary Care Physician5 Title, Primary Care Physician5 ID, Primary Care Physician5 Doctor Name, Primary Care Physician5 Doctor NPI, Primary Care Physician5 Doctor Federal tax Id, Primary Care Physician5 Doctor Taxonomy Code, Primary Care Physician5 Doctor Specialty, State Funding of Vaccine, Self Responsible, Self Pay, Exempt from Reporting, With Collection Agency, Worker Compensation, Financial Class Name, Type Name, Attorney Law Firm, County / Parish, Mothers Maiden First Name, Mothers Maiden Last Name, Patient sexual Orientation SNOMED, Patient Gender Identity SNOMED, Multiple Birth Indicator Y/N, Birth Order Number, Patient sexual Orientation SNOMED, Patient Gender Identity SNOMED"

Only active patient's details are exported.

9. **Patient Insurance**

   This contains the patient's insurance information like Patient Name, Insurance name, Plan ID, Group Number etc. There is no subfolder for this.

Exported field list is -

"Unique Auto ID, Patient Insurance External Id, Plan Number / Id, Plan Name, Group No, Group Name, Group Employer ID, Group Employer Name, Plan Type HMO, PPO. Uses Group Master, Type Name, Date of commencement of Plan, Validity upto Date, Status Name, Policy Number, Relation with the Subscriber, First Name, Middle Name, Last Name, Sex, Date of Birth, Inactive Record, External Id. Unique, ID for Company. Unique, Insurance Company Name, Payer Id. Unique, Status Code, Copayment Amount, Pre certification of the Hospital, Serial Number of Insurance, Pre Authorization Number for Referral, Pre Authorization Number Upto Date, Pre Authorization Number of Visits, Attorney Id, Ins Adjuster Id, Insurance Type Code for Medicare as Secondary Insurance, Eligibility Request/Response Date, Eligibility Response Text Redundant, Multi Pre Authorization Text, Deductible Amount as on Date, Deductible & Out of Pocket, Eligibility Payer Id for Professional, Eligibility Payer Id for Institutional, Eligibility Policy Number, Need Referral, Contact Person Name, Filing Indicator Code, Federal Tax Id, Address Line1, Address Line2, Address City, Address State Code, Address Zip, Address Email, Address Tel Office1, Address Tel Office2, Address Tel Residence, Address Tel Cell, Address Fax, Address Single Line"

Only insurances with a status of active are exported. If the insurance is marked as inactive in the insurance master, it will not get exported. Also, if the status of the patient insurance is non-active it will not get exported.

10. Vaccination

This exports the vaccine records that are administered using the options 'Vaccination on this visit' and 'Vaccination not associated with this visit'. The Scheduled vaccines are exported. The vaccines which are 'Not Tracked' are not exported.

Once the vaccine is inactivated in the vaccine it is not available for further selection. However, if this vaccine was administered then it does get exported.

Exported field list is -

"ID, Date, Name, Dose Number, Admin When, Route, Site, Manufacturer, Lot Number, VIS Date, VIS Given Date, Immunized, CVX Code, Code, Age Range, Admin By, Reaction, Deleted"

11. Health Maintenance

Health maintenance details are exported only for the tests which are in Due or Tentative states. The history is not exported. Type of tests for which data exported are: Lab / Rad / Consult / Procedure.

Exported field list is -

"Date, Type, Test, ID, Remarks, Status, Deleted"

12. Family History

All the latest family history data is exported for patients.

Exported field list is -

"Date, Problem, Relation, Problem SNOMED, Relation SNOMED, ID, Deleted"

13. Past Medical Hist

Past medical history data is exported as per the latest encounter status for the patients.

Ailments are also exported.

Exported field list is -

"Since When, ICD9, SNOMED, Name, Comments, ID, ICD10, Status, Deleted"

14. Surgery

This contains the surgical history records of the patient. This data is exported as per the face sheet data for the patient.

Exported field list is -

"Since When, Procedure, Hospital, Doctor, ID, Deleted"

15. Allergy

This contains the allergy data of the patient. This data is exported as per the face sheet data for the patient.

Exported field list is -

"Allergy, Reaction, Type, Int Name, Status, ID, Date, Rx Norm Code, NDC Code, Adverse Event Name, Reaction SNOMED, Deleted, Date"

16. **Current Medication**

Current medication data is exported as per the latest encounter status for the patients.

Exported field list is -

"Date, Remark, Upto Date, Refill, Drug, Long Term, PRN, Dispensable Drug NDC Code, ID, Bulk Qty, Bulk Unit, Delete, Substitute, Refill Denied, Pharmacy Name, FDB Generic Drug ID, FDB Dispensable Drug ID, Dispensable Drug RxNorm Code"

17. **Social History**

This contains the social history records of the patient. Social history data is exported as per the latest encounter status for the patients.

Exported field list is -

"Test Name, Reading, Remarks, SNOMED, ID, Date, Encounter Deleted, Test Unit, Abnormal, Test LOINC Code, Result LOINC"

18. **Legal Documents**

This contains patient records which have one or more Legal Documents attached to their account in PrognoCIS. It typically lists patient's basic information and the Legal record related information as input in PrognoCIS. If documents are HTML, then they are converted to PDF, else copied as is.

It contains a specific column labeled "File" which contains path of the attachment.

For ex. CHART01/ DOCLD_1974.pdf

Here, CHART01 is the folder and the DOCLD_1974 corresponds to the physical file stored under the Folder CHART01.

19. Other Documents

This contains patient records which have one or more Other Documents attached to their record in PrognoCIS. It typically lists patient's basic information and the Other Document related information as input in PrognoCIS.

It contains a specific column labeled "File" which contains path of the attachment.

For ex. CHART01/DOCOT_5421.pdf

Here, CHART01 is the folder and the DOCOT_5421 corresponds to the physical file stored under the Folder CHART01.

20. Enc Attach Docs

This contains patient records attached to their account in PrognoCIS. It typically lists patient's basic information and the Other Document related information as input in PrognoCIS.

Multiple attachments in an Encounter

For ex. CHART01/DOCEN_23166.pdf

Here, CHART01 is the folder and the DOCEN_23166 corresponds to the physical file stored under the Folder CHART01.

21. Old Progress Notes

All the documents (Doc Type: OPA) attached to the patient account are exported. If documents are HTML, then they are converted to PDF, else copied as is. Along with the files attached, excel file is also exported with following fields.

It contains a specific column labeled "File" which contains path of the attachment.

For ex. CHART01/PROG_53942.pdf

Here, CHART01 is the folder and the PROG_53942 corresponds to the physical file stored under the Folder CHART01.

22. Messages

All the patient messages that are added to patient record from Message Compose screen.

Exported field list is -

"ID, Date, Subject, Notes, Sender"

23. Future Appointments

All patient appointments (today and onwards) with status as Scheduled or Tentative are exported.

Exported field list is -

"Date, Appointment Doctor Name, Visit Type Name, Status Name, Reason for Visit, From HrsMin, Upto HrsMin, Location Name, ID, Appointment Doctor ID, Appointment Doctor NPI, Appointment Doctor Federal tax ID, Appointment Doctor Taxonomy Code, Appointment Doctor Specialty, Location Code, Instructions, External ID, Comment"

24. Vitals

This contains the patient's basic demographics information.

We only export vitals recorded as per the latest encounter.

Exported field list is -

"Date, Test Name, Reading, Test Unit, Remarks, SNOMED, ID, Encounter Deleted, Abnormal, Test LOINC Code, Result LOINC"

25. Diagnosis Code

This is the list of diagnosis codes as per the assessment in patient's encounter.

Exported field list is -

"ICD9 Code, ICD10 Code, PMH, Date, ID, Primary, Billable, Assessment, Plan, ICD Desc, Deleted"

26. CPT Codes

This is the list of CPT codes as per the assessment in patient's encounter.

Exported field list is -

"CPT Code, CPT Name, Modifiers, ICD9 Codes, SNOMED Code, Revenue Code, Date, ID, ICD10 Codes, Source"

27. HCPC Codes

This is the list of HCPC codes as per the assessment in patient's encounter.

Exported field list is -

"ID, HCPC Code, HCPC Name, Modifiers, SNOMED Code, Date, ICD9 Codes, ICD10 Codes, Revenue Code, Source"

28. CCD

This contains the CCD details.

29. Prescriptions

This contains the Rx details of the patient. All the drugs ever prescribed for the patient in Prognocis are exported.

Exported field list is -

"Date, Drug Name and Strength, Upto Date, Refill, Drug, Long Term, PRN, ID, Bulk Quantity, Bulk Unit, Delete, Substitute, Refill Denied, Pharmacy Name, Status, Mode, Sent Date, Number Of Days, Frequency, Deleted"

30. Lab Results

All the received Lab Results will be exported.

Exported field list is -

"Order Number, Order Date, Category, Subject, Result Date, Result Notes, Sender Name, ID, Ordering Doctor ID, Ordering Doctor Name, Ordering Doctor

NPI, Ordering Doctor Federal tax ID, Ordering Doctor Taxonomy Code, Ordering Doctor Specialty, Vendor Name, Doctor Notes, Order Status Code, Order Status Name, In House, Bill Type Code, Bill Type Name, Report Comments, Internal Comments"

31. Rad Results

All the received Radiology Results will be exported.

Exported field list is -

"Order Number, Order Date, Category, Subject, Result Date, Result Notes, Sender Name, ID, Ordering Doctor ID, Ordering Doctor Name, Ordering Doctor NPI, Ordering Doctor Federal tax ID, Ordering Doctor Taxonomy Code, Ordering Doctor Specialty, Vendor Name, Doctor Notes, Order Status Code, Order Status Name, In House, Bill Type Code, Bill Type Name"

32. Procedure Orders

All procedure orders and results are exported.

Exported field list is -

"Order Date, Order Number, Scheduled Date, Reason, Status, Deleted, Procedure Name, Attending Doctor ID, Attending Doctor Name, Location Name, Subject, Sender, Order Date, Result Date, Result Notes, Category, ID, Attending Doctor NPI, Attending Doctor Federal tax ID, Attending Doctor Taxonomy Code, Attending Doctor Specialty, Primary Doctor ID, Primary Doctor Name, Primary Doctor NPI, Primary Doctor Federal tax Id, Primary Doctor Taxonomy Code, Primary Doctor Specialty, Location Code, PreAuth Nos, Performed By, Performed Date, Insurance Name, ICD10 Codes"

33. Consults

All patient consults are exported.

Exported field list is -

"Order Date, Order Number, Scheduled Date, Status, Deleted, Consult Name, Attending Doctor Name, Location Name, Subject, Sender, Order Date, Result Date, Result Notes, Category, Refer To Name, ID, Attending Doctor ID, Attending Doctor NPI, Attending Doctor Federal tax ID, Attending Doctor Taxonomy Code, Attending Doctor Specialty, Primary Doctor ID, Primary Doctor Name, Primary Doctor NPI, Primary Doctor Federal tax ID, Primary Doctor Taxonomy Code, Primary Doctor Specialty, Location Code, Refer To Name, ICD10 Codes"

34. Enc Progress Notes

This contains patient visit records. It typically lists patient's basic information and the Visit/Encounter record related information available in PrognoCIS.

The progress notes (My Notes) along with the attached progress notes are exported only for encounters that are closed. If there are multiple My Notes created then only the default My note gets exported.

It contains a specific column labeled "File" which contains path of the attachment.

For ex. CHART01/PROG_53942.pdf

Here, CHART01 is the folder and the PROG_53942 corresponds to the physical file stored under the Folder CHART01.

Exported field list is -

"Date ,Encounter Type Code ,Encounter Type Name, Problem Note ,Attending Doctor Name, Status Open/Close, ID ,Attending Doctor ID, Attending Doctor NPI ,Attending Doctor Federal tax ID ,Attending Doctor Taxonomy Code, Attending Doctor Specialty, Referring Doctor ID, Referring Doctor Name, Referring Doctor NPI, Referring Doctor Federal tax ID, Referring Doctor Taxonomy Code, Referring Doctor Specialty, Date of the follow up encounter, Follow Up Reason, Date on which the transcript is freezed, Refer To Doctor Id, Refer To Doctor Name, Refer To Doctor NPI, Refer To Doctor Federal tax ID, Refer To Doctor Taxonomy Code, Refer To Doctor Specialty, Confidential, Health Status Code, Health Status Name, Health Status Date, Attending Nurse /Clinical Staff, ID in another system, Category, Subject, Reviewer ID, Reviewer Name, Reviewer NPI, Reviewer Federal

tax ID, Reviewer Taxonomy Code, Reviewer Specialty, Pre Authorization Number for referral, Patient Age on encounter, Rendering Doctor ID, Rendering Doctor Name, Rendering Doctor NPI, Rendering Doctor Federal tax ID, Rendering Doctor Taxonomy Code, Rendering Doctor Specialty, Supervisor ID, Supervisor Doctor Name, Supervisor Doctor NPI, Supervisor Doctor Federal tax ID, Supervisor Doctor Taxonomy Code, Supervisor Doctor Specialty, Pregnancy Number, Pregnancy Completion, Flag for Encounter Deleted, Case #,Primary Insurance Name, Secondary Insurance Name, SNOMED, Appointment Location Code"

35. Procedure Notes

This contains patient records which have Procedures attached to their account in PrognoCIS. Procedure notes documents for the non-zero duration encounters are exported.

It contains a specific column labeled "File" which contains path of the attachment.

For ex. CHART01/PROC_68966.pdf

Here, CHART01 is the folder and the PROC_68966 corresponds to the physical file stored under the Folder CHART01.

Exported field list is -

"Date, Template, ID"

Please note that in order to be able to export procedure notes, print template MUST be assigned to the templates.

36. Letters

This contains patient records which have one or more Letter-in and Letter-out records attached to their record. All the letters which are sent out with status 'sent' or incoming letters attached to the patient's record are exported. Any attachments with the outgoing letter are NOT exported.

If the letter is sent to multiple recipients then a consolidated PDF with multiple letters is generated. For A letter is sent To: Mary Smith and To: John Smith and CC: Mark Smithe then a single PDF is created with all the three letters.

The excel sheet has the following details of the letters. In case of multiple recipients only one row is generated with the 'To-From' column displaying the first recipients name.

Exported field list is -

"Letter Date ,Outward (O), Inward (I) ,To Name, Subject, List of To Names ,List of Cc Names ,List of To and Cc Names ,Status Code ,Status Name ,Address ,Long Email ID ,Fax Number ,Name of Sender ,Category ,Deleted"

It contains a specific column labeled "File" which contains path of the letter.

For ex. CHART01/LETOut_99.pdf

CHART01/LETIn_389.pdf

Here, CHART01 is the folder and the LETOut_99 and LETIn_389 corresponds to the physical file stored under the Folder CHART01.

37. All Vitals

This contains Vitals for all Encounters.

Exported field list is -

Patient First Name, Last Name, Middle Name, Chart No. Account No. Date Of Birt, Encounter Date, Test Name, Reading, Test Unit, Remarks, SNOMED, ID,

38. Lab Test Result Values

Lab results with status as 'Received' or 'Complete' are exported. This exports discrete result tests.
   – All the lab test results with status R & C will be exported.
   – Test results from Deleted encounters, DE/FS encounters are also exported.

Exported field list is -

"Order Number, Order Date, Ordering Doctor ID, Ordering Doctor Name, Ordering Doctor NPI, Category, Subject, Vendor Name, Doctor Notes, Result Date, Result Notes, Order Status Code, Order Status Name, In House, Sender Name, Bill Type Code, Bill Type Name, Report Comments, Internal Comments, Order Test Name, Order Test Name, Order Test LOINC, Result Test Name, Result Test LOINC, Result Test LOINC, Result as Text Value, Unit of the Test Reading, Range, Test Reading Range From, Test Reading Range Upto, The status set by the Doctor. Normal/Abnormal, Remarks, Collection Date Time, ICD Codes, ID, Ordering Doctor Federal tax ID, Ordering Doctor Taxonomy Code, Ordering Doctor Specialty"

39. Patient Cases

Contains the list of Patients and their Cases.

Exported field list is -

"Case ID, Patient Name, Case Number, Injury Date, Injury Place, Injury State, Body Part, P/s Status, First Illness From Date, First Illness Upto Date, Similar Illness Date, Hospitalized From, Hospitalized Upto, Can't work from date, Can't work upto date, WCAB#, QME Panel, Lien Notes, Patient Insurance, Case Management Insurance, Insurance Name, Insurance Attorney Name, Insurance Adjuster Name, Patient Attorney Name, Patient Adjuster Name, Approved Amount, Actual Billed Amount, Closed, Close Date, Comment, Employer Name, Job ID, Case Key, Lien, Case manager 1, Case manager 2, Case manager 3, Approved Visits, Actual Visits, Modified User, Modified Timestamp"

40. Patient Notes

All Patient Notes saved for a Patient in the NOTES table (Type: CN)

Exported field list is –

" Patient Notes, Notes Date Created "

41. Patient Alert

All Patients Alerts except the Alerts that are deleted.

Exported field list is –

" Patient Alert, By Timestamp "

42. Past Appointments

All Patient Appointments of current and previous dates with *Visit Status* Scheduled, Tentative, Arrived, With Nurse, With MA, For MA, With Doc, Complete, Ready for Nurse, Ready for Doc, Ready for Checkout, Ready for Review.

Exported field list is –

"Date , Appointment Doc Name , Visit Type Name, Status Name Reason for Visit, From HrsMin , Upto HrsMin , Location Name, ID , Appointment Doctor ID , Appointment Doctor NPI, Appointment Doctor Federal tax ID , Appointment Doctor Taxonomy Code, Appointment Doctor Specialty, Location Code, Instructions, External ID , Comment"

43. Billing Ledger

Exports the Ledger for Run Date. Ledger will be exported for billed claims only. We do not export claim wise ledger.

44. Billing Claims

Exports all Billed Claims for the Patient. Claims which are billed only those claims will be exported. Void claims will not be exported. UB04 data will NOT be exported – No CMS 1500 / UB04 forms will be exported.

Exported field list is -

"ID, Transaction Type, Batch Number, Batch date, Billing Provider Type, Rendering Provider Type, Rendering Provider Name, Pay to Provider Type, Subscriber Type, Subscriber ID, Patient Name, Insurance Sequence, INS1 ID, INS2 ID, Work Compensation, Auto Type, Accident Type, Referral ID, Preauth Number, Financial Class, ICD, Paper, Pregnant, Send Date, Claim Status, Bill Amount, Insurance Amount, RP Amount, Wo Amount, Balance Amount, From Date, Place Of Service Code, Claim Location Name, Responsible Person Name, Insurance Adjusted Amount, Claim Copay, Paid Total Amount, Claim BU Name, Hospital From Date, Hospital Upto Date, Primary Insurance Name, Attending Provider,

Secondary Insurance Name, Patient Balance Amount, Primary Balance Amount, Secondary Balance Amount, Post Date, UB04 Type, Tertiary Insurance ID, Referral Provider ID, Capitation Type, Employer Name, Tertiary Balance Amount, Employee Balance Amount, Encounter Type, Tertiary Insurance Name, Case Number, ICD10 Codes, Employer TPA Name, Claim Location Name, Claim BU Name, Reference ID, Submitter Type, Submitter ID , Receiver type, Receiver ID, Billing Provider ID, Pay To Provider Type ID, Encounter ID, Appointment ID, Payor ID, Bill To, Not Billed Type, Provider Sign Type, Accept Assignment, Assign Benefits Type, Release Information, Patient Sign Source Code, Accept Date, Matched Type, Upto Date, Type Of Service Code, Type Of Service Name, Place Of Service Name, Submit Reason Number, Comments, Modified User, Modified Timestamp, Primary Patient Insurance ID , Secondary Patient Insurance ID, Claim Location Code, Expected Amount, Claim Date, Matched Date, Bill reference ID, Control Number, 997 Error, Claim Number Print, Track Date, Claim Resend Count, Partner ID, Fee Schedule Number, Claim ID, Cell 19 Remarks, Ignore Type , By EDI Type, Attorney1 Name, Attorney2 Name, Insurance1 Adjuster Name, Insurance2 Adjuster Name, Claim BU Code, EDI Error Comments, Reprocess Status, Track Status, Reference2 ID, Cancelled Type, Inactive Type, Base Claim ID, Claim2 Status, Remittance ID, Secondary Send Date, Patient Wf, Duplicate Encounter ID Type, Claim Batch Number, Assigned To, Assigned Date, Assigned Status, Primary CLM053, Secondary CLM053, Attach Extn, Creation Batch, DCN ICN, Claim Ready4EDI, Primary Recalled, Secondary Recalled, Reopen From, AB Start Time, AB End Time, AB Duration Min, Reference doc Referral Number, Cell10 Local use, Reopened, Hold Type, Copay ID For Use Advance , Resend Action Primary secondary, Tertiary Patient Insurance ID, UB04 Out patient Type, 1st Statement Date,Type By EDI2, Reopen Reason, Bill2 employee Type, Claim3 Status, Tertiary Send Date, Void Type, PPP ID, Bill FSH ID, Allowed FSH ID, EDI Q, Bill FSH Percent, Allow FSH Percent, IPA IDs, Assigned Cat ID, DMERC Type, Preauth For, PATINV, PATINV Text, 10d Claim Codes, Bool Icd10, Collection Agency Name, Collection Agency Date, Collection Agency balance Amount, Payors Claim Number, Claim ICD ID, Secondary Insurance DCN ICN, Claim Job ID, Assigned Follow up Date, Case ID, Emp Dept ID, Patient Attorney ID, Primary UB04 Type, Secondary UB04, Tertiary UB04, Hold ID , Type Of Service Name, Place Of Service Name"

45. Billing Charges

Exports all Billed Claims and their Charges for the Patient. Void Charges are not exported.

Exported field list is -

"Claim ID ,Line Number, From Date, Upto Date, Code, Modifier1 Code, Modifier2 Code, Modifier3 Code, Modifier4 Code, Modifier5 Code, ICD Codes, Type of Service Code, Units, Bill Amount, Insurance Amount, RP amount, WO amount, Balance Amount, Comments, Allowed Amount, Insurance Adjust Amount, Paid Total Amount , Paid Insurance Amount , Paid Patient Amount, Insurance 2 Amount, Copay Amount, Deductible Amount, Not Covered Amount, Total W/off Amount, Insurance W/off Amount, Patient W/off Amount, Balance Amount, Encounter Copay Assign Amount, Discount Amount, Supplemental, Name, Primary Paid, Primary Adjusted, Primary Writeoff, Secondary Paid, Secondary Writeoff, Tertiary Paid, Tertiary Writeoff, Patient Paid, Patient Writeoff, Patient Balance, Charge Balance, Primary Insurance Excess Amount, Secondary Insurance Excess Amount, Responsibility Date, Primary Responsibility Amount, Primary Balance Amount, Secondary Balance Amount, Secondary Paid First, UB04 PROC Code, Category, Employer paid Amount, Employer W/off Amount, Tertiary Insurance Paid Amount Tertiary Insurance W/off Amount, Tertiary Insurance Excess Amount, Preauth Number, Col Agency Responsibility Amount, Col Agency Paid Amount, Col Agency W/off Amount, Col Agency Fee Amount, ICD10 Codes, ID, Code Type, Modifier1 Name, Modifier2 Name, Modifier3 Name, Modifier4 Name, Modifier5 Name, Base code, Place of service Code, Add by billing, EPSDT, Family Planning, EMG, COB, Not Billed, Matched, Modified User, Timestamp, Source ID, Expected amount, Code Id, Bill to Patient, Current Responsibility, Charge code Edit Allowed, EPSDT Type, Primary Recalled Type, Secondary Recalled Type, Primary Extra Amount, Secondary Extra Amount, Reopen from, Minutes, Crossover Applicable, Copay Assigned, Do not send Charge code, Moved Responsibility Now, Exempt UPM, IPA ID, Expected Balance Amount, Ordering Doctor, Billing Group, SNOMED Code, TCI IDs, Code 4 secondary, Modifiers 4 secondary, Units 4 secondary, TPA ID, Primary Diagnosis TCI ID, Outside Lab Flag Type, Purchased Doctor, Purchased Rate, Outside Lab Name, Base ID, Modifier1 Name, Modifier2 Name, Modifier3 Name, Modifier4 Name, Modifier5 Name"

46. Patient Advance

Data of the Patient's Advance which is Moved to Advance or Opening Advance will be exported. Only billed claims data will be exported.

Exported field list is -

"ID, Advance Type, Patient Name, Insurance Name, Transaction Type, Sub Type, Reference Transaction Type, Reference Date, Reference Doctor Number, Advance Amount, Balance Amount, Advance Used, Remarks, Factor, Opening Type, Post Type, Location, Business Unit, Rendering Provider Name, Attending Provider Name, Non Post Balance Amount, Employer Name, Reference ID, Copay ID, matched Type, original Type, Reference Advance ID, Edited, Modified User, Timestamp"

47. Statements

Exports the Statement for Run Date.

Latest Patient statement will be exported for billed claims only.

For ex, If we have a statement generated for a patient Dummy test on 01-01-2017, 01-01-2018 and 01-01-2019. Then, the statement will get generated for 01-01-2019. Which is the latest.

We do not export claim wise statements. File name with path - For ex. CHART01/STATEMENT_173141.pdf Here, CHART01 is the folder and the STATEMENT_173141 corresponds to the Patient ID.