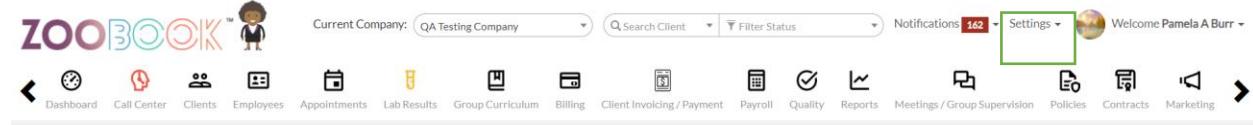


§170.315(b)(10) Electronic Health Information Export Documentation

Step1: Go to the Setting Menu



Step2: Find the EHI Export Item

The screenshot shows the ZOOBOOK software's Settings menu. The 'EHI Export' option is highlighted with a green box. Other visible options include General, Amendment Settings, Bed Management Settings, Billing Settings, Business Rules Management, Clinical Decision Support Settings, Companies, Data Export Settings, DropDown Manager, Email Templates, Enhancement Packages, Form Builder, Job Descriptions, Notifications Manager, Prescriber List, Real-time Notifications, Referrals/Payers, Urine Screen Code Management, Vacation and Leaves Settings, Logs, Email Logs, Fax Messages, SMS Send Logs, and Security.

Step 3: Enter the filter

EHI Export

Date From: 11/1/2023 Date To: 11/15/2023

Clients: Select options Modules: Select options

[Generate Link](#)

[Records](#)

Show	10	entries	Search:	Print	Show/Hide Columns				
Client Ids	Full Name	Module Ids	Module Name	Url	Start Date	End Date	Created By	Expiration Date	
223837	QAtest, TeoTest1	253	Psychiatric Progress Note	(QAtest, TeoTest1) (Psychiatric Progress Note)	11/24/2023	11/30/2023	Pamela	11/30/2023 10:47:49 AM	Download
132370 223954	Miller, Paul, Tezt, Premiz Mi	246	Mental Health Assessment	(Miller, Paul, Tezt, Premiz Mi) (Mental Health Assessment)	11/19/2023	11/29/2023	Pamela	11/30/2023 10:42:15 AM	Download

Filter Definition:

- Date Range:** This field specifies the time frame during which the records were either created or updated. It is a critical parameter in the EHI export file, as it helps to filter and identify records based on their creation or modification dates. This ensures that the exported data is relevant to the specified period.
- Clients:** This section lists all the clients that are included in the EHI export file. It provides a comprehensive view of whose data is being exported, ensuring clarity and specificity in the data handling process.
- Modules:** This field details the specific modules included in the EHI export file. By specifying the modules, users can understand the context and origin of the data, which aids in its interpretation and application.

Step 4: Click "Generate"

Upon clicking the "Generate" button, the system will process the specified parameters (Date Range, Clients, Modules) and create a record of the EHI. This record can then be accessed and downloaded in two ways:

Download Button: A direct and user-friendly option, the download button allows users to immediately download the EHI record file to their local device. This method is straightforward and is typically preferred for its ease of use.

Public URL: Alternatively, users can access and download the EHI record file via a provided public URL. This method is particularly useful for remote access or when sharing the file with others who have authorized access.

Both methods ensure that the EHI export file is readily accessible and can be retrieved in a manner that best suits the user's needs. The process is designed to be efficient and user-

friendly, ensuring a smooth experience in managing and exporting electronic health information.

Records								
<input type="button" value="Show"/> <input type="text" value="10"/> entries								
Client Ids	Full Name	Module Ids	Module Name	Url	Start Date	End Date	Created By	Expiration Date
223837	QAtest, TeoTest1	253	Psychiatric Progress Note	(QAtest, TeoTest1) (Psychiatric Progress Note)	11/24/2023	11/30/2023	Pamela	11/30/2023 10:47:49 AM

Column Definition:

- **Client ID:** This field represents the unique identifier assigned to each client. It is included in the Electronic Health Information (EHI) export to distinctly recognize each client within the system.
- **Full Name:** This field contains the complete name of the clients. It is a mandatory inclusion in the EHI export, ensuring that each record is personally identifiable.
- **Module Name:** This refers to the specific module within the system from which the EHI data is being exported. The inclusion of the module name in the EHI export assists in categorizing and contextualizing the data.
- **URL:** This is the public URL from which the EHI export can be downloaded. It provides a direct link for users to access and retrieve the exported data.
- **Start Date:** This field denotes the commencement date of the record included in the EHI. It marks the beginning of the time frame for which the data is relevant.
- **End Date:** This indicates the final date of the data record included in the EHI. It defines the closure of the data's time frame, ensuring a clear and concise period is represented.
- **Created By:** This field identifies the employee who generated the record. Including this information in the EHI export is crucial for accountability and traceability within the system.
- **Expiration Date:** This date signifies when the EHI record will expire or become unavailable for download. It is essential for maintaining the relevance and timeliness of the data.
- **Download Button:** This is a functional element in the interface that enables users to download the EHI record file. It provides a straightforward and user-friendly means for data retrieval.
- Each of these elements plays a vital role in the structure and utility of the EHI export, ensuring that the data is comprehensive, accessible, and appropriately managed.

EHI Export Business Rules

Step1: Navigate to the Management of Business Rules.

- Billing Settings
- Business Rules Management

Step2: Locate the settings specific to EHI Export in the system.

The screenshot shows a software interface for managing EHI export rules. At the top, a yellow header bar contains the text "EHI Export Rules". Below this, there is a search bar and a "Save" button. The main area is titled "Modules" and displays a list of 172 selected items. A modal window is open over the list, containing a "Filter" input field with "Enter keywords" placeholder text, a "Check all" checkbox, and an "Uncheck all" link. The list of modules includes the following entries, each preceded by a checked checkbox:

- 836 : Client Notes To File
- 842 : PHI Disclosure Log
- 853 : CPST Note
- 1841 : Counseling Monthly Individual Progress Report
- 811 : Comprehensive Psychosocial Evaluation
- 883 : Pre-Admission Documents

The product offers a feature to restrict users from conducting EHI exports through the Module Management Setting. To access this, navigate to the Settings menu, locate the settings panel, and then proceed to the 'General' section. Here, you will find the option for 'EHI Export,' where you can adjust the permissions and limitations for user access to EHI export functionalities.

Step1: Locate The Module Management

Security

Client File Restrictions

Company Roles Management

Company Wide Settings

FHIR Settings

Module Management

Provisional Account Management

Step2: Locate the Setting Panel



Step3: Modify the settings to align with your preferences.

The screenshot shows the 'EHI Export' settings panel. On the left, there are fields for 'Name:' (set to 'EHI Export'), 'Url:' (set to '/Settings/General/EHIExport'), 'Icon:' (a dropdown menu), 'Target:' (set to '_self'), 'Active?' (checked), and 'Accessible During Emergency?' (unchecked). A blue button at the bottom says 'Use Menu Default Settings'. On the right, there is a 'Select Roles:' section with a checkbox for 'Select All User Roles'. Below it is a grid of checkboxes for various roles, each with an icon: Administrative Staff, Billers, Counselor, Hr Staff, Manager, Receptionist, Supervisor, Administrator, Clerical, Director, Intake, Medical Staff, Sample Collector, Support, Assistant Clinical Director, Client, Driver, Intern/Trainee, Provisional User, and Super Administrator. A blue button at the bottom right says 'Individual User Access'. At the bottom right of the panel are 'Close' and 'Save Menu' buttons.