

# Nextech Select/NexCloud EHI Export

## Overview

This page provides guidance on the export of Electronic Health Information (EHI) from Nextech Select/NexCloud EMR (aka Select), as per the 170.315(b)(10) standard.

EHI documentation for Select will consist of:

- Folder structure description
- Data Dictionary of all fields exported within the Clinical Discrete Data
- CSV files within the Clinical Discrete Data (Appointments, Patient demographics, Charges, Payments, Custom, Follow up, Notes, Insurances, Recalls, Recalls Steps, Payment Plans, PracYakker (Internal messaging), iPad Tasks, iPad Notes)
- EMN folder that will contain all electronic medical notes (encounter data capture) for the patient in PDF format
- CCDA - the xml version of the Consolidated Clinical Document Architecture
- Publicly available hyperlink for EHI documentation

**Note:** All exported data is considered Protected Health Information (PHI) and requires that all privacy and security guidelines be used to ensure that the information is encrypted and stored appropriately after download.

Note: This document set includes information on data for all configurations of the certified EMR product. Exports for customers with a third-party practice management (PM) system will not include data from that system; customers should contact the administrator of their PM. Nextech customers who are configured to use the iPad user interface will see limited PM data based on what is stored in the certified EMR.

## Data Dictionary

Data dictionary for EHI for Select: [Nextech Select/NexCloud EHI Data Dictionary](#)

## Zip folder Structure

The ZIP file consists of following folders and files in this folders structure:

- **CSV** - folder that contains all CSV files with patient clinical data:
  - **CSV files:** Appointments, Patient demographics, Charges, Payments, Custom data, Follow up, Notes, Insurances, Recall, Recall Steps, Payment Plans, PracYakker, iPad Tasks, iPad Notes
- **Documents** - folder that contains all documents attached to patient chart
- **EMN** - folder that contains all encounter data - EMN (electronic medical note) files in PDF format
- **iPad Documents** - folder that contains all documents attached to the patient's chart in iPad Select application
- **CCDA file** - the standard CCDA file formatted as per Implementation Guide
- **Read me** - file that contains the public link to the documentation

Name	Type
CSV	File folder
Documents	File folder
EMN	File folder
IpadDocuments	File folder
CCDA.xml	XML File
ReadMe	Internet Shortcut

Name	Type
 Appointments	Microsoft Excel Comma S...
 Charges	Microsoft Excel Comma S...
 CustomData	Microsoft Excel Comma S...
 FollowUps	Microsoft Excel Comma S...
 Insurances	Microsoft Excel Comma S...
 iPadNotes	Microsoft Excel Comma S...
 iPadTasks	Microsoft Excel Comma S...
 Notes	Microsoft Excel Comma S...
 PatientDemographics	Microsoft Excel Comma S...
 PaymentPlans	Microsoft Excel Comma S...
 Payments	Microsoft Excel Comma S...
 PracYakker	Microsoft Excel Comma S...
 Recalls	Microsoft Excel Comma S...
 RecallsSteps	Microsoft Excel Comma S...

## ZIP file name

The ZIP file name consists of:

- Patient First Name Initial and full Last Name;
- Patient's unique Person ID;
- Date and Time stamp when ZIP export is generated.

For example: **FirstNameInitial\_LastName\_PersonID\_DateTimeStamp.ZIP**

 D\_Patient\_1\_102623\_115804.191

## CSV files within the CSV folder (Clinical Discrete Data)

CSV files exported within the Patient's clinical discrete data are:

- Appointments.csv - export of all patient appointments
- Patient demographics.csv - export all patient demographics data
- Charges.csv - export of all charges data related to the patient
- Payments.csv - export of all payments data related to the patient
- CustomData.csv - export of data added in the system dependent on user's preferences (field's names and purpose of the fields is custom and it is setup on practice's level)
- Follow up.csv - export of all follow up/to-do data related to the patient, that a user added as a reminder
- Notes.csv - Export of all notes data related to the patient. Notes can be added from a specific notes section of the product or from other sections of the system such as:
  - Notes → Message threads
  - EMN → Labs
  - Billing
  - Payment Plan
  - Billing → Add note on existing item on the inside in the hierarchy of bill or payment
  - EMN → Implantable Devices
  - Recalls
  - Appointments
  - Reminders
  - History
- Insurances.csv - export of all patient insurance data
- Recalls.csv- export of all recalls related to the patient
- Recalls Steps.csv - export of all recall steps related to the patient
- Payment plans.csv - export of all payment plans created for the patient
- PracYakker.csv - export of all internal messages where the patient is mentioned
- iPad Tasks.csv - export of all tasks related to the patient added on the iPad Select application
- iPad Notes.csv- export of all notes related to the patient added on the iPad Select application.

## EMN (Electronic Medical Note) - Encounter Data Capture

For each patient encounter we are creating a separate EMN.pdf file in the EMN folder. The format, items, fields, and content used in the EMN files, and the order by which this information is presented is custom and the user/practitioner can use, move, create items and sections based on their preferences and needs for a specific patient. In the data fields dictionary document, the documentation provided for this export is best practice but that does not mean that those fields will be present for every patient nor that those are the only fields that can be included in the

export. That is just a portion of the fields and items used, and the number of fields/items can be larger/smaller totally dependent on user's preferences,

The name of the EMN.pdf contains the Document ID.

## **CCDA file within the ZIP file**

CCDA (Consolidated Clinical Document Architecture) is standardized file format used for health information exchange in the US, formatted in the XML as defined in the HL7 Implementation Guide here: [http://www.hl7.org/ccdasearch/pdfs/Companion\\_Guide.pdf](http://www.hl7.org/ccdasearch/pdfs/Companion_Guide.pdf) [HL7 Standards Product Brief - HL7 CDA® R2 IG: C-CDA Templates for Clinical Notes R2.1 Companion Guide, Release 4.1 - US Realm | HL7 International](#)

Within the CCDA following data classes are exported for a given patient:

- Patient Demographics - some patient demographics data is not exported in the CCDA, full patient demographics data is exported in PatientDemographics.csv
- Health Insurance – some insurance data is not exported in the csv file but that is already present in the CCDA
- Allergies
- Medications
- Medications administered
- Problems
  - SDOH Problems
- Problem list
- Procedures
  - SDOH Intervention
  - Reason for Referral
- Clinical Test
- Lab orders
- Lab results
- Diagnostic Imaging
- Immunizations
- Medical equipment
- Assessment and Plan of Treatment
  - SDOH Assessment
- Social history
- Vital signs - some vitals data are exported in the CCDA. In addition to that, full Vitals data is exported in the EMN data export
- Reason for Referral
- Reason for Visit
- History & Physical note
- Goals

- SDOH Goals
- Assessments
- Health concerns
- Mental Cognitive status
- Disability Status
- Pregnancy Status
- Care team members - provider information
- Diagnoses/encounter diagnoses - some diagnoses data are exported in the CCDA. In addition to that, full diagnoses data is exported in the EMN data export.
- Implantable Devices- some Implantable Devices data are also exported in the CCDA. In addition to that, full diagnoses data is exported in the EMN data export
- Referring Provider
- Discharge summary

## General notes on CSV files included in the Clinical Discrete Data folder

### No data to export in CSV

In case of no patient data for a given data class to export, then relevant CSV file will be generated or not as per these rules:

- CSV files: If there is no data for a given data class, then the empty CSV file will be created.

### Deleted records in CSV

Some CSV files will also include the deleted record of the given data class. In such cases, the relevant deleted status of the data will be captured within its status as elaborated in the Data Dictionary.

e.g.: Direct messages exchanged between users of the application that are related to a patient will be exported, including the deleted messages (PracYakker.csv export).

### Inactive patients

All patients and patients' data will be exported, including inactive patients.

### Documents (folder)

All documents attached to the patient's chart in Select will be exported to the Documents folder in the EHI ZIP file. Types of documents that can be part of the documents folder:

- Images, photos
- eCR Reportability responses
- Attachment files added in direct messages between the practice and external source, that are related to the patient;
- Attachment files added in the Online Visits section (titled "agnosis") that are related to the patient

- Any documents attached by the users of the system related to the patient
- Any folder/s containing documents attached by the users of the system related to the patient;
- Clinical summary of care documents
- Summary of care documents.

## iPad Documents

All documents attached to the patient's chart in iPad Select application will be exported in the iPad Documents folder of the EHI ZIP file.

## Other Specifics to include in the EHI documentation for Select

### Billing data (Charges, Payments, and Payment plans)

Charges, Payments, and Payment Plans are all separate csv exports in the CSV folder.

Charges and Payments are linked by the Bill ID that exists in both exports. Billing data is part of the Charges exports. The logic behind is that every charge will have a bill, but one charge or one bill can have multiple payments and thus the separation of the charges and payments exports in separate files.

Payment plans are a separate export because plans are added separately and having a payment plan is not required for the patient to be charged, billed, or to make a payment. However, if a payment is made it can be linked to a specific payment plan, then that information is part of the Payments export. Payment plans export and Payments export are linked via the Payment Plan ID and Payment ID which will have the same value when a payment is linked to a payment plan.

Billing data will not be included for practices with the iPad application as this data is stored in the non-certified PM module.

### Custom data export

The custom data export will contain custom fields name and values that will be dependent solely on the practice's preferences. The types of fields used can be date, free text, list item and check box. If a practice uses this module of the system, all data related to the patient will be exported with the name of the custom field as configured by the practice.

### Notes

Notes can be added in the Notes section/module of the system but also as part of other sections/modules added below. All these notes will be part of the Notes.csv export, linked by their respective IDs, already explained in the data dictionary excel file:

- Notes
- Notes → Message threads
- Labs
- Billing

- Payment Plan
- Billing → Add note on existing item on the inside in the hierarchy of bill or payment
- EMN → Implantable Devices
- Appointments → Recalls
- Appointments
- Reminders
- History

## **Recalls and Recalls Steps**

Recalls and Recalls steps are separate csv exports added in the CSV folder. There can be many steps related to one recall and thus the need to separate these exports. These exports can be linked by the Recall Step ID field. Recalls can also be linked to an Appointment. The Appointments.csv export and the Recalls.csv export are linked via the Appointment ID field.

## **iPad Notes, iPad Tasks, iPad Documents**

Some practices are using the iPad application for user interface instead of the desktop application. These practices are adding data into the iPad app, which is saved into the database but in separate tables for some of the modules of the product, and thus requires separate csv exports. We have separate exports for Tasks, Notes and Documents that are added through the iPad application. If a patient has no data entered on the iPad app, then those csv files will be empty.