Exporting Documents Using the C62 File Format

There are multiple ways to export a document from a patient's chart. This can be done for a single document of a single patient, for selected documents in a patient's chart or as a batch process to export the documents from multiple patients' charts at the same time.

Exporting a Single Document

To export a single document, from the patient's chart, click on the document in the patient's **TOC** (Table of Contents). Once viewing the document, use the right-click menu to select **Export** via C62.

Exporting a Chart (or Multiple Documents in a Chart)

To export an entire chart of a single patient, open the chart within the Clinical window. From the Overview Page, select **Export Chart** from the right-click menu.

| Patient Communicator Send Message via Portal | • | | |
|--|-----|---|--|
| Send Secure E-Mail | | | |
| Patient Info Alert Referrals Print Activate Phone Patient Questionnaires Form Completion Library | • • | | |
| Import | • | | |
| Export | • | Patient Portal: Update Chart | |
| Print Med List Preventive Care Info Preventive Care Exceptions Treatment Goals | | Patient Portal: Password Reset | |
| | | Export Continuity of Care | |
| | | Export Chart | |
| | | Export Continuity of Care - Referral | |
| Document Queue Refill Management Correspondence Set-Up Edit Form | | Export Continuity of Care - Batch | |
| | | Export Immunization Data | |
| | | Export Syndromic Data Export Medical Records | |
| Exit Clinical Window | ٦ 1 | | |

This opens the Export Chart window:

| Export Chart | | | |
|---|--|--|--|
| From: 11/16/21 thru / / | | | |
| Cover Sheet | | | |
| ✓ Notes | | | |
| Text Documents | | | |
| Scanned/Faxed Documents | | | |
| Include Restricted Documents | | | |
| Output Option: O Print © Export to Folder O Export to C62 file | | | |
| Select Recipient | | | |
| Queue / Fax Record | | | |
| OK Cancel | | | |

From here, enter a date range (if desired) and select the type of documents you want included in the extract. Select **Export to C62 file** and click **OK**.

Exporting Multiple Charts

To export multiple charts at the same time, from the Main Menu, click on Tools, then Clinical, then Export, then select the patient criteria you want included in the batch (e.g., by last name range, by date of birth, by patient classification, by provider, etc.), select the types of documents you want included and the date range, then click **OK**.