

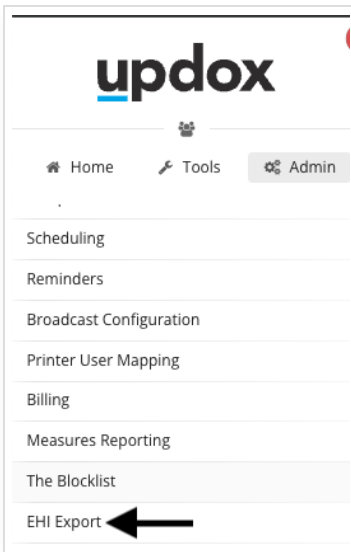
# Creating a New Request



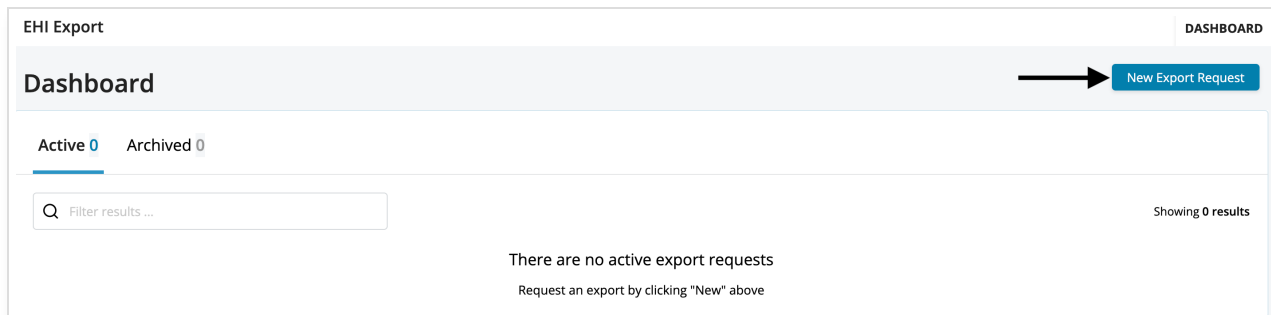
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You can create two types of export requests: Individual and Practice. An individual export allows you to export the data associated with a patient. A practice export will export all the patient and document data in your account.

Both types of exports begin under the **EHI Export** section of the **Admin** menu.



Next, from the EHI Export dashboard, select **New Export Request**.



Exports are available for download for 30 days once completed. After 30 days (from the date a request has finished processing and is available for download), the request will move to the Archived tab. You will still be able to view the details of the request once it is archived, but the downloadable files will be permanently deleted and no longer available.

## Individual Patient Export Request

On the request submission screen:

- Name the export
- You can enter an optional description
- Select a Date Range
- Under Export Type, choose **Patient**

## New EHI Export Request ✕

**Export Name: \***

**Description:**

**Date Range: \***

*Select a range of dates to export*

**Export Type: \***

Patient  Practice

Cancel Submit

After you have selected Patient as the export type there will be some information you need to enter.


- Select the patient
- Choose the data you would like included in the export
- Enter a due date for the export

Please note, the Due Date on a Patient level export is intended for your internal use to track when the data may have been promised to a patient and organize your in-progress requests.

Click **Submit** to export the data for the patient. The request will process and appear in the dashboard.

### New EHI Export Request ✕

**Export Name: \***  
Sample\_Patient\_Export

**Description:**  
Sample Patient Data Export 

**Date Range: \***  
January 1, 2023 - November 1, 2023  
*Select a range of dates to export*

**Export Type: \***  
 Patient  Practice

**Patient \***  
Sample Patient  
DOB: 1991-11-05 (31 years)  
Cell: 4105555555 ✕

**Included in Export: \***

<input checked="" type="checkbox"/> <b>Continuity of Care Documents</b> <i>CCDs contain patient summary information.</i>	<input checked="" type="checkbox"/> <b>Patient Portal Messages</b> <i>Messages sent to or from the Patient Portal</i>
<input checked="" type="checkbox"/> <b>Secure SMS Messages</b> <i>Messages sent or received by Secure SMS</i>	<input checked="" type="checkbox"/> <b>Video Chat Summary Documents</b> <i>Summaries of past patient Video Chats</i>

**Due Date:**  
11/03/2023

Cancel Submit

## Exporting Practice Data

With a practice export, you can export the data and documents for your entire patient population.

Please note that practice-level exports may take a significant time to process depending on the amount of data in your account.

On the request submission screen:


- Name the export.
- You can enter an optional description
- Select a Date Range
- Under Export Type, choose **Practice**

## New EHI Export Request ✕

**Export Name: \***

**Description:**

**Date Range: \***  
  
*Select a range of dates to export*

**Export Type: \***  
 Patient  Practice 

After you have selected Practice, choose the data you would like to include in the export and click **Submit**.

## New EHI Export Request ✕

**Export Name: \***

**Description:**

**Date Range: \***  
  
*Select a range of dates to export*

**Export Type: \***  
 Patient  Practice

**Included in Export: \***

<input checked="" type="checkbox"/> <b>Continuity of Care Documents</b> <i>CCDs contain patient summary information.</i>	<input checked="" type="checkbox"/> <b>Folder Items</b> <i>This will include all items from the inbox, archive, sent and trash folders and any attachments.</i>
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Next, you will need to confirm the export request by reviewing the information in the window, checking the boxes, and clicking **Confirm**.

## Confirm Export Request



### Are you sure you want to submit this export request?

Double check your selections before submitting. Exports may take hours to days to complete, depending upon the amount of data.

- \*  I acknowledge that once requested, this export cannot be cancelled.
- \*  **Only one export at a time:** I acknowledge that once requested, neither I nor anyone else will be able to request any more exports (including single-patient exports) from this account until this export completes.
- \*  I acknowledge that this export will only be available for download for 30 days after it becomes READY for download and after said 30 days the generated ZIP file(s) will be permanently deleted.

Back

Confirm

The request will process. You can view the status and download the export on the Dashboard.

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