

Electronic Health Information Export ([§170.315\(b\)\(10\)](#)) Specific Documentation

All EHI single patient or population export functions are available at no charge from InterSystems. We cannot make any representations about policies of relied upon EHR partners.

HealthShare Personal Community relies on the EHR to export any EHI (single patient or population) that may be captured on forms. In particular, the product relies on the following vendors:

- EPIC Systems Corporation (EpicCare Ambulatory Base & EpicCare Inpatient Base) <https://open.epic.com/EHITables>
- Cerner Corporation (Milenium (Clinical), Soarian Clinicals) <https://www.oracle.com/health/regulatory/certified-health-it/>
- Athenahealth, inc. (athenapractice or athenaflow) <https://docs.mydata.athenahealth.com/fhir-r4/ehiexport.html#electronic-health-information-ehi-export>
- Athenahealth, inc. (athenaclinical) <https://docs.athenahealth.com/athenaone-dataexports/>

HealthShare Unified Care Record supports both population export and single patient reporting. The intended user of single patient reporting is a non-technical, typically administrative, user. Population export will require more technical expertise. Following is supporting documentation for these capabilities:

- Single Patient Reporting:

Patient reports are based on clinical and demographic data stored in the ECR. Patient reports can be viewed in the HealthShare® Clinical Viewer or your custom user interface.

This chapter describes:

- [How to view patient reports with the HealthShare® Clinical Viewer](#)
- [How to modify patient reports](#)

Viewing Patient Reports

Patient reports can be viewed in the Clinical Viewer. For details on how to access patient reports in the HealthShare clinical user interfaces, including setting up the

necessary permissions, see [About Patient Summary Reports](#) in the *Customizing the Clinical User Interfaces* guide.

Patient Summary Display Options

The Patient Summary Report page allows you to view summaries of the patient record in a variety of formats. To choose the format in which the Patient Summary Report is presented, click the **View As** drop-down. Options include but are not limited to:

- HTML
- PDF
- SDA
- Consolidated CDA CCD
- Continuity of Care Document (CCD HITSP C32)

You can also view different reports by clicking the **Report** drop-down. Each of these reports can in turn be viewed in any of the previously mentioned formats. The content of each of these reports and how they can be modified can be found in the Patient Report Definitions page, which is discussed in the [Patient Report Definitions](#) section.

Sending and Downloading Patient Summaries

In addition to viewing a patient record, you can also send and download Patient Summary Reports, using the controls at the top of the Access Summary screen.

- The **Send** button opens a new window that allows you to send the patient record that you were viewing in the format of your choosing (for example, HTML or PDF). You can also add a note about the record and any necessary attachments.
- **Download Summary** opens a new window that allows you to download the patient summary in the format of your choosing (for example, HTML or PDF).

To send or download only specific portions of the patient summary, click the **Filter** button. This brings up the **Patient Summary Filters** window, otherwise known as the *Filter UI*. Here, you can filter the entire patient summary or individual sections of the summary by the source of the report (the facility) and by how many days back (that is, the number of days before today) you wish to include in your search. If the **Filter By Days Back** field is blank, all historical information is displayed.

Modifying Patient Reports

The appearance of and information contained in patient reports depend on two sources: Patient Report Definitions and the Zen report class. The Zen report determines the SDA sections that are allowed to be in the patient report, while the Patient Report Definitions determine which of those SDA sections are fed into the Zen report and thereby become part of the patient report. Any sections included in the Patient Report Definitions but not in the Zen report will not be displayed.

This section discusses:

- [The Patient Report Definitions page.](#)
- [The Zen report class.](#)
- [How to create a new patient report.](#)
- [How to add a report section.](#)

Patient Report Definitions

Patient Report Definitions are in the Management

Portal: **HealthShare > HSREGISTRY > Report Management > Patient Report Definitions.**

There are three pre-defined patient report styles: Patient Summary Report, Patient Summary Report (Claims), and Patient Summary Report (Expanded). The reports differ in the Report Sections they contain. The default report is Patient Summary Report.

Click on any of the rows to display the **Report** and **Report Sections** tabs.

The **Report** tab lists:

- The report **Code**.
- The report **Name**, as displayed in the Patient Summary Report page.
- The **Zen report class** to which the report is associated.
- The **SDA Version** used by the report.
- Whether or not the report is the **Default Report**.

The **Report Sections** tab lists the report sections present in the Patient Summary Report. To see details about a report section, click on its row. Each report section contains:

- An **Element Name**, the name of the report section in the Zen report.
- A **Section Type**, the SDA section corresponding to the report section.
- Any **Sub-Types**, which, if applicable, appear in a drop-down menu.
- A default **Days Back** field, indicating how far in the past to look when displaying patient record information. This field is applied to the Patient Summary Report page as well as the Filter UI.
- **Filter UI Sort Order**, which controls the order of the report sections in the Filter UI. This sort order only appears in the Filter UI.
- **Filter UI Display Name**, which controls the name of the report section in the Filter UI. This name only appears in the Filter UI.

As you can see, each report section contains two names: an element name, which corresponds to its label in the Zen report, and a Filter UI Display Name, which controls how the report section is named in the Filter UI, which appears when you download or send a summary. Neither name controls how the name of the report section appears in the Clinical Viewer; this is done by the Zen report.

You can add a report section to a patient report by clicking the **Add Report Section** button. The available report sections are defined in the Report Section Types page, found in **HSREGISTRY > Other Management > Report Section Types**.

Zen Report Class

The Zen report class, [HS.Reports.Patient.SummaryOpens in a new tab](#), controls which sections are allowed to appear in a patient report. These sections appear in an XData block called **ReportDisplay**.

For example, **ReportDisplay** contains a <group> element with a “name” attribute of “PatientSection”. This group corresponds to:

- The **PatientSection** report section found in the Patient Report Definitions.
- The **Patient Demographics** section of the Patient Summary Report

These two correspond to one another because in the Report Section Types page, the type **Patient Demographics** has code **PAT**, and in the Patient Report Definitions page, the report section **PatientSection** also has code **PAT**.

```

<body >
  <group name="Sections" pagebreak="true">
    <!-- Patient Demographics -->
    <group name="PatientSection">
      <p ifxpath='IncompleteResult' field="IncompleteResult/text()"/>
      <p class="tableIntro">Patient Demographics</p>
      <table group="Patient" orient="col" class="main" defaultWidth="none" layout="none">
        <item field="concat (Name/GivenName,&quot; &quot;;Name/FamilyName)">
          <caption value="Name" style="padding:5px;"/> <!-- TBS -->
        </item>
        <item field="substring-before(BirthTime, &quot;T&quot;)" >
          <caption value="Date Of Birth" style="padding:5px;"/>
        </item>
        <item field="Gender/Code" >

```

If you wish to change the display name of a report section in the Patient Summary Report, you must edit both the “name” attribute of that report section here in the Zen report and the element name in the Patient Report Definition. Failure to edit both can lead to confusion. Additionally, for permanent work, InterSystems recommends creating a custom subclass of [HS.Reports.Patient.SummaryOpens in a new tab](#) and making modifications there instead of in the original class.

See [Using Zen ReportsOpens in a new tab](#) for details on creating Zen reports (because Zen reports is a deprecated feature of InterSystems IRIS, this link goes to the deprecated Caché documentation set).

Creating a New Patient Report

To create a new patient report:

1. Navigate to the Patient Report Definitions page.
2. Click **Add Report**.
3. Fill out the fields in the **Report** tab.
 1. Enter a unique **Code**.
 2. Enter a **Name**.
 3. Choose a **Zen Report Class**. You may use the default, [HS.Reports.Patient.SummaryOpens in a new tab](#).
 4. Choose the **SDA Version** used by your report, typically SDA3.
 5. Choose whether you want the new report to be the **Default Report**.
4. Click the **Report Sections** tab.
5. Click **Add Report Section** to add a new report section.
 1. Enter an **Element Name** for the report section. This name should correspond to the “Name” attribute of the <group> element for the report section you are adding, as found in the Zen report. If the report section is not present in the Zen report, you must add it before continuing. See the

- section [below](#) on adding a report section when that section is not present in the Zen report.
2. Choose a **Section Type** corresponding to the SDA section that the report section comes from.
 3. Enter a number of **Days Back**, indicating how far in the past to look when displaying patient record information. Leave the field blank to display all historical information. This field is applied to the Patient Summary Report page as well as the Filter UI.
 4. Enter a positive integer for **Filter UI Sort Order**. This field controls the order of the report sections presented in the Filter UI. For example, a report section with a sort order of **10** will appear before a report section with a sort order of **20**. Integers are usually entered as multiples of ten to allow for subsequent changes.
 5. Enter a **Filter UI Display Name**. This field appears in the Filter UI only and appears instead of the element name.
 6. Click **Save Report Section**.
 7. Repeat steps 5 and 6 until you have added all the report sections that you want.

Adding a Report Section

You may add a report section that is either:

- Present in the Zen report but not in the Patient Report Definitions.
- Present in neither the Patient Report Definitions nor the Zen report.

For example, you may wish to create one Zen report that contains all report sections and subsequently create several patient summary reports, each containing a unique combination of record sections. Each patient summary report could then correspond to a different situation.

To add a report section that is present in the Zen report but not in the Patient Report Definitions, you may follow steps 4 through 7 [above](#) to fill out the information for the new report section.

To add a report section that is not present in the Zen report or the Patient Report Definitions:

1. Open Studio.

2. Open your custom class that extends [HS.Reports.Patient.SummaryOpens in a new tab](#), or create such a class.
3. Add the report section to your custom class.
4. Navigate to the Patient Report Definitions page.
5. Click the Patient Summary Report to which you wish to add the report section.
6. Follow steps 4 through 7 [above](#) to fill out the information for the new report section.

A report section should never be present in the Patient Report Definitions without being present in the Zen report. The Zen report should contain all report sections that are allowed to appear in the patient report, and the Patient Report Definitions should be a (not necessarily proper) subset of those report sections, representing those which do appear in the patient report.

- **Population Export**

All patient data captured within the HealthShare Unified Care Record may be exported as clinical summary using a supported API.

Exporting Patient Data as Clinical Summaries

To support Data Portability for ONC Health IT Certification 2014 Edition to achieve Meaningful Use Stage 2, an API has been added to export all patients in the database to disk using clinical summary documents (chosen by the user). This method, **HS.Viewer.Services.ExportAllPatients()** can support the standards-based export for purposes of data portability.

Using the Clinical Portal, it is also possible to select a set of patients who are grouped into a cohort and export their complete record. In the Patient List, a new icon has been added to the **Actions** column which can be used to export an individual patient's record.

Consent is enforced when exporting.