

# Manual CCDA Exports

Last Modified on 03/04/2025 1:07 pm EST

The option to manually set up and download CCDA exports to a local machine is now available in the Summary of Care - Export > Schedule section. This will allow practice users or others with access to the client database to set up recurring or one-time exports for a variety of scopes. This article describes the steps to set up and complete a manual CCDA export to a local machine.

**Add Schedule**

Export Type  Manual  Third Party Service

TPS Type \* CCD Schedule Export (36)

Entire Population

Provider Search

Appointment From \* [Date Picker]

Appointment To \* [Date Picker]

Completed Notes

Notes Starting From \* [Date Picker]

Problem List Diagnosis

Group \* [Dropdown] [Refresh] [Edit]

Export Date

Encounter  Latest Encounter

Schedule Setup

Specific Date \* [Date Picker]

Recurring Every \* [Dropdown]

Alias [Text Field]

Export Time \* [Dropdown] [Apply] [Close]

## Considerations

1. Since exports are a taxing process both on the system (while preparing) and your computer (during download), be cognizant of the size of the data and the time of the export.  
*ex. Exporting the entire 500k patient population in the middle of the clinic may cause slowness for all staff members using the software. It may be worth exporting over the weekend and downloading the files on Monday morning.*
2. **Export Date:** Be cognizant of whether you select Encounter or Latest Encounter in the **Provider** and **Completed Notes** options. The encounter will pull each instance of a CCDA for the selected date range for the patient, the Latest Encounter will only pull the most up-to-date information for the patient.
3. The Problem List Diagnosis **Group** allows users to filter by a Procedure Diagnosis Code Group, allowing all active patients with an active problem list containing a code in the group to be exported. For more information on creating Diagnosis Code Groups, visit our [Diagnosis Code Groups Setup Help Article](#).
4. A highly specific **Alias** should be set for each export you set up.  
*ex. "MIPS Monthly Export for MyCCD Company"*

# Steps to Complete

## Add a New Export

1. Navigate to **Reports**
2. Under the EMR category, select **Summary of Care**
3. **Export > Schedule**
4. Select **ADD**
  - Within the **Add Schedule** window:
    - Export Type = Manual
    - TPS Type = Any (*Not relevant for manual exports, but still required*)
    - Select any of the three options depending on your use case: Entire Population, Provider, or Completed Notes
    - Export Date:
      - **Encounter** = Any encounter in the selected timeframe
      - **Latest Encounter** = Only the most up-to-date CCDAs available for a patient within the parameters
    - Schedule Setup:
      - **Specific** = The date the export will begin generating the CCDAs, used for one-time exports
      - **Recurring** = The date the export will begin generating the CCDAs, used for exports needing to repeat on a schedule
    - Alias = Description of reason and intended destination of the export
    - Export Time = Preferably select a time outside of clinic hours. "NOW" is not recommended for large exports
5. **Apply**
6. The export will begin preparing at the date and time set in **Add Schedule** above. Continue about your other daily tasks and return to the screen the day following the scheduled export.

## Download a Prepared Export

1. Navigate back to the **Summary of Care > Export - Schedule**
  2. Select the schedule setup in the prior steps, ensure the status indicates the export is ready for download
  3. Select **Export** located next to Results and Refresh
  4. Determine the # of files you would like to process per group. Having a smaller number of files/group may help your computer download the files easier.
  5. Select a file location for the .XML files
  6. Files will begin downloading into the directory you selected
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