WELFORD CHART NOTES
NEWSLETTER

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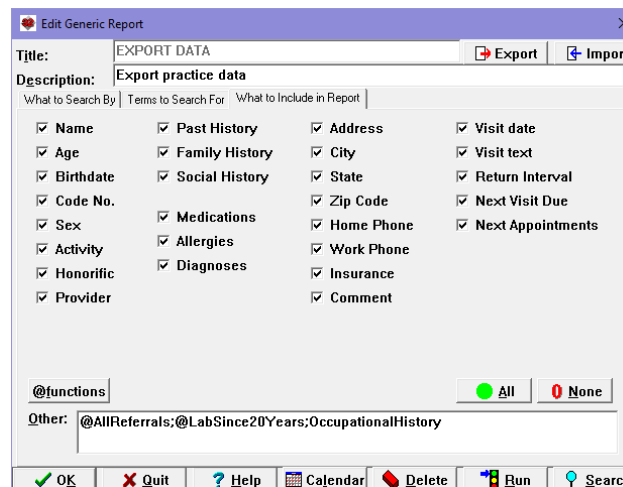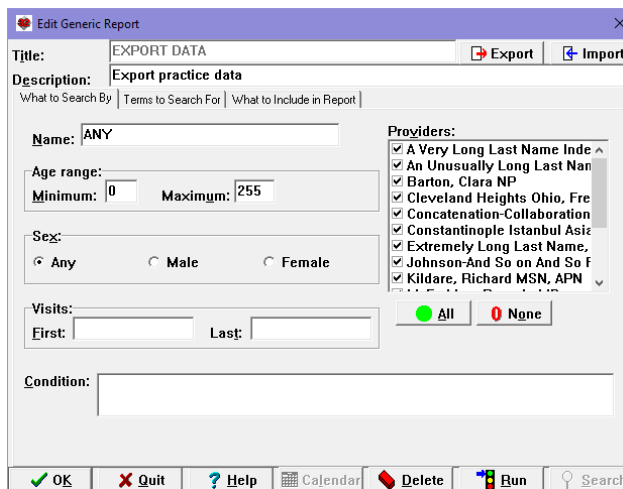
EXPORTING YOUR DATA TO ANOTHER EMR

To help you to prepare for when **Welford Chart Notes** is no longer on the market as of June 1, 2018 (see June, 2017 *Newsletter*), we continue this month describing another method of exporting data from **Welford Chart Notes** into another EMR. (See the July, 2017 *Newsletter* for a discussion of Batch Print by Patient).

GENERIC REPORT GENERATOR *(User's Manual, pgs.379-386, 644-648, 904)*

This method can export data in **Welford Chart Notes** about patients to a plain text file or to a CSV (comma separated variable) file. Many programs can import data in CSV format, such as Microsoft Excel.
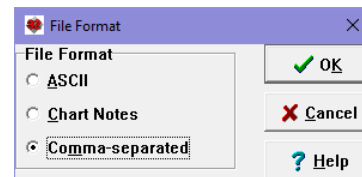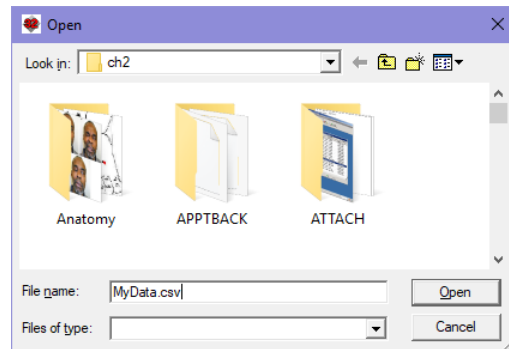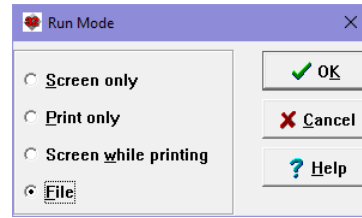
Let's see how to do this:

1. Press Report\Generator.
2. Give your Report a **Title**, such as "Export Data."
3. Optionally enter a **Description**, such as "Export practice data".
4. On the **What to Search** by page, assuming you want to generate a report that includes your entire practice:
   a. Leave **Name** as ANY.
   b. Leave **Age** range as **Minimum** 0 and **Maximum** 255.
   c. Check all **Providers**, or press the **All** button to check all of them.
   d. Leave **Sex** as **Any.**.
   e. Leave **Visits First** and **Last** blank.
   f. Leave **Condition** blank.
5. Leave the **Terms to Search For** page blank.
6. On the **What to Include in Report** page:
   a. Press the **All** button to check all of the choices.
   b. Note that you can add other data to be included in the report by adding them to the **Other** box directly, or by pressing the **@functions** button and

then choosing various @functions to include in the report. For example, if you want to include all of the data in the Lab Book, use @LabSince followed by a date or interval of time that takes you to the beginning of when you first used **Welford Chart Notes**, e.g. @LabSince20Years. If you want to include all of the Referrals, add the @AllReferrals @function, etc. You can also include Expanders, both those that come with the program or user-defined. For example, if you have created an Expander called "Occupational History", you can include that in the **Other** box using OccupationalHistory. Note that Expander names should NOT be preceded by an @ symbol (to distinguish them from @functions) and any spaces in the names of the Expanders should be removed. Separate @functions and Expanders using commas, semicolons, or periods, such as: "@AllReferrals;OccupationalHistory".

7. Press **OK** to store your Generic Report Generator Definition. (This step is optional as it is not required in order to run the report, but it is a good idea in case you ever want to run the same report again).
8. Press **Run** to now run this report.
9. For **Run Mode**, select **File** and press **OK**.
10. Specify the name of the file that you wish to have hold the data. If you want the file to be in CSV format, use ".CSV" at the end of the file name, such as "MyData.CSV". Press **Open**.
11. For **File** Format, if you want the file to be a plain text file, specify **ASCII**. If instead you want the file to be a CSV file, specify **Comma-separated**. Then press **OK**. (**Chart Notes** format is only used if you are transferring data from one copy of **Welford Chart Notes** to another, which isn't relevant to this discussion). Press **OK**.
12. Let the report run to completion. This may take hours depending on the size of your practice and the number of years of data to export.
13. Take the file you have created and import it into your new EMR.

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Export File in CSV Format

Next month we will see how to use the SQL Exporter to export your data to a SQL database.

SEND US YOUR TIPS

If you have tips, shortcuts, questions, or suggestions for future newsletter topics, please send them to us at:

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