



ChartMaker® Data Transition Options - ASP

Transitioning Your Data

When your practice is:

- Switching to another certified EHR
- Closing the practice
- Merging with another practice

... it is your responsibility to retain your clinical and financial data. Please review the options below to determine the best approach for your practice. If you are terminating any monthly or annual services, completion of a [Termination Checklist](#) is required.

Data Retention Guidelines

Clinical Data

- Adult patients: 10 years from date last seen
- Minor patients: 28 years from date of birth
- Deceased patients: 5 years from date of death

Financial Data

- CMS requires a minimum 3-year retention
- For IRS audit purposes, 7 years is recommended

Termination Checklist Instructions

If discontinuing services, complete the **STI Termination Checklist**:

1. Visit sticomputer.com
2. Navigate to Client Tools > STI Termination Checklist
3. Choose either:
 - ASP (Cloud) Termination, or
 - Client Server Termination (if you have an on-prem server)
4. Submit the form after filling in all required fields.

Services eligible for online termination include Software Support, Portal Fees, Managed Services, and RCM Billing, ASP Monthly Fee.

Data Export Options for ASP Office

For the ASP offices who are not RCM clients, please contact Janell prior to selecting your export option to verify your commitment period has been met for the ASP contract. Janell can be reached at 229-351-7387 or janell.brown@azaleahealth.com.

You can export your data using **self-service options** or request **assisted export services** (additional cost applies).

As an ASP (Cloud) account, your data will be exported to a secured, HIPAA compliant, location. STI Managed Services has outlined the process for your office to create the [S3 Storage Bucket](#).

Do-It-Yourself Export Methods - (ChartMaker version 6.8.6 or higher)

This option is intended for practices that are moving to another EHR and want to move their data from Clinical and import into the new EHR.

1. Mass Export of Patient Summary Information (CCD Files)
 - Found in **ChartMaker Clinical > Chart > Export > Transition of Care All Patients**
 - Exports individual CCD files in XML format for all active patients
 - File name format: LastName_FirstName_ChartNumber.xml
 - Includes demographics, medications, diagnoses, allergies, and more
 - Compatible with all certified EHR systems that support HL7 C-CDA
 - Everyone must be out of Practice Manager and Clinical until the process completes. Depending on the size of the database, it may take days, and in some cases longer than a week.
 - If there is an interruption, such as a power outage or server reboot, the process must start over.
 - See [ASP Export Transition of Care All Patients](#).
 - [More info on this export format is available here](#).
2. Electronic Health Information Export
 - Found in **ChartMaker Clinical > Chart > Export > Electronic Health Information Export**
 - Exports patient data in machine-readable format plus a FHIR document and chart images (JPG) — each page of a multi page document will be exported as an individual JPG file.
 - Supports individual or full population export.
 - For full export, this process consumes significant storage space.
 - See [ASP EHI Export Guidelines](#).
 - [More info on this export format is available here](#).
3. Patient Demographics and Financial Reports (PDF/CSV)
 - Run and export from Practice Manager in PDF or CSV format.



Assisted Export Services (via Azalea Health) (ChartMaker version 6.8.6 or higher)

This option is intended for practices that are moving to another EHR and want to move their data from Clinical and import into the new EHR.

Option 1 – Comprehensive Export

Includes the following for entire patient population-Patient documents (PDF) - a multi page document will be exported as a single PDF file

- Native format files (e.g., Word docs)
- CCD files
- 3 years of patient-level financial history
- CSV exports of system/patient data: locations, providers, insurance payers, fee schedule, appointment reasons and resources, demographics, insurance policies, appointments, recalls



Document export may take weeks depending on data volume; CSVs can be expedited.

\$ Cost is based on the size of the database: \$7,500 (less than 5GB) / \$15,000 (up to 10 GB) / \$22,500 (10GB or higher)

[Learn more about the ChartMaker Data Export Format and what is included.](#)

Option 2 – CSV Export Only

Includes the following for entire patient population:

- System and patient-level data in CSV format: locations, providers, insurance payers, fee schedule, appointment reasons and resources, demographics, insurance policies, appointments, recalls



Cost: \$1,500

[Learn more about the ChartMaker Data Export Format and what is included.](#)



Extended Data Access

Azalea offers an optional **read-only hosting service** to retain access to your ChartMaker Medical Suite data and documents after transition.

- Data is migrated to a read-only version of ChartMaker Medical Suite on the Azalea Health Platform. Monthly fee applies
- Ideal for practices that need temporary access post-transition
- Can be used alongside export options listed above

\$ Cost: \$250 per month

Contact Information

For assistance or more information, please contact: frederick.polito@azaleahealth.com