Purpose

Canadian clinics occasionally need to generate a *portable, human-readable* copy of every patient's medical record—for example, when retiring a practice, changing EMRs, or responding to a mass-disclosure request. This playbook provides step-by-step instructions for exporting **all patients** to individual **PDF** files (one PDF per patient) from the ten most-used private-practice EMR systems in Canada.

Scope: Chart contents (encounter notes, prescriptions, labs & imaging, immunisations, consult letters, scanned documents, demographics, problem list, allergies, medications, billing notes, and internal comments) for *every* active and archived patient.

Regulatory checklist (all provinces)

- 1. Verify you have *Physician-Administrator* or equivalent rights in the EMR.
- 2. Notify your privacy officer (or the physician custodian) that a bulk export is occurring.
- 3. Confirm external storage is **encrypted at rest** (BitLocker, FileVault or AES-256 ZIP) and transported via secure courier or SFTP.
- 4. Retain audit logs of the export task for **10 years** (Ontario CPSO) or the jurisdictional minimum.

Quick reference summary

EMR	Built-in bulk PDF export?	Typical runtime for 5 000 charts	Notes
PS Suite	CSV/CDS ZIP → Ocean Attachment Exporter script	4–6 h	Requires Ocean Attachment Exporter & batch list ¹
Accuro	Print ► Entire Chart ► PDF printer (batch macro)	6–8 h	QHR recommends running after-hours ²
OSCAR Pro	Demographic Export ► Select All ► Exp ort ZIP → CDS-to-PDF converter	2–4 h	XML→PDF with ADITECH tool ³
Med Access	Administration ► Print Chart ► All sections ► PDF (loop via patient list)	5–7 h	Telus tip sheet 'Print Chart' ⁴

EMR	Built-in bulk PDF export?	Typical runtime for 5 000 charts	Notes
CHR	More Actions Export Patient Chart (PDF) (API script)	3–5 h	Requires 'Export Patient Chart' role ⁵
Juno	Summary Print Chart (PDF) (Python Selenium batch)	2–4 h	UI element on Details page ⁶
Avaros	Administration ► Data Management ► Demographic Export (Select All)	1–2 h	Produces ZIP of PDFs directly $\frac{1}{2}$
MOIS	Patient Chart ► Print ► Entire Chart (PDF) (AutoHotKey loop)	4–6 h	MAR included since v 2.17.43 ⁸
EMR Advant age	CDS XML export (vendor utility) → CDS-to-PDF converter	4–6 h	OntarioMD-certified CDS export ⁹
Profile EMR	Medical Record ► Print Summary PDF (full chart requires vendor)	6–8 h	Bulk full-chart export performed by Intrahealth ¹⁰

Detailed procedures

1. PS Suite (TELUS Health)

Prerequisites

- Ocean Toolbar & Attachment Exporter installed¹
- Excel/CSV list of patient chart numbers (or run *Data Export* \rightarrow *CDS ZIP* for all patients)

Steps

- 1. In *PS Suite Admin* ► *Data Export*, choose **CDS Export** and select **All Patients**. Save the ZIP to a secure drive.
- 2. Launch the Ocean Attachment Exporter utility.
 - Point it at the exported ZIP (or at PS Suite live if exporting per patient).
 - In *Export Type*, tick **Full Chart (All Notes & Documents)**.
- 3. Click **Batch Export**. The tool loops through every patient, producing **one PDF per chart** in the destination folder.
- 4. When complete, run **7-Zip** ► Add to Archive (AES-256) to encrypt the folder for transfer.

2. Accuro (QHR Technologies)

Prerequisites

- Local or ASP session with a PDF printer driver (Microsoft Print to PDF or Bullzip).
- Optional: Accuro macro recorder licence.

Steps

- 1. Run **EMR** ► **Utilities** ► **Panels** ► **Patient List** and generate a list of all active & inactive patients.
- 2. Start recording an Accuro Macro:
 - Load Patient ► Virtual Chart ► Right-click ► Print Entire Chart ► Select PDF printer ► Accept default sections ► Save.
- 3. Stop recording the macro; then choose **Run Macro for List** and point it at the patient list.
- 4. Monitor the **Print Queue**; each chart is rendered to a PDF named *PatientName_HCN.pdf*.
- 5. ZIP and encrypt the output directory.

3. OSCAR Pro / OSCAR OpenOSP variants

Option A – Vendor bulk service (quickest)

- 1. File a *Data Export Full CDS* ticket with WELL EMR Group; they will place a CDS ZIP on your SFTP site.
- 2. Download and decrypt.
- 3. Proceed to Step 3 below.

Option B – Self-service

- 1. Log in as *oscar_admin* ► Administration ► Data Management ► Demographic Export.
- Choose Patient Set: ALL ► Select All Elements ► Export. Download the resulting ZIP (CDS XMLs).³
- Install the free CDS-to-PDF Converter from ADITECH. Point it at the ZIP → Click Convert. One PDF per patient is produced.

4. Med Access (TELUS Health)

- 1. Generate an **All Patients** search list \rightarrow click **Reports** \triangleright **Print Chart**.
- 2. In the Print Chart dialog, choose All Sections; destination PDF.⁴
- 3. Repeat for each patient via Telus **Batch Print Tool** (contact Telus Support for the script) or automate via Selenium.

5. Collaborative Health Record (CHR)

- 1. Ensure your user role has **Export Patient Chart** permission.⁵
- 2. Open Settings ► API ► Generate Token and copy it.
- 3. Run the provided *CHR-Bulk-Export* Python script (InputHealth GitHub) with parameters:
- 4. chr_export.py --token <TOKEN> --all-patients --format pdf --out /secure/export
- 5. The script calls POST /patients/{id}/export?type=pdf for each chart and streams the PDFs.

6. Juno EMR (WELL)

- 1. From **Reports** ► **Patients** ► **Export**, create an "All patients" CSV (for ID list).
- 2. Launch the Selenium **juno-pdf-export.py** script:

- Logs in, navigates to patient Details ▶ Print Chart.⁶
- Saves the generated PDF as *Chart_.pdf*.
- 3. Compress & encrypt.

7. Avaros EMR

- 1. Administration ► Data Management ► Demographic Export.⁷
- 2. Choose Patient Set: All \rightarrow Select All Elements \rightarrow Export.
- 3. Avaros produces a ZIP already containing per-patient PDFs—no conversion needed.

8. MOIS EMR (Bright Health)

- 1. Install AutoHotKey script mois_export.ahk (provided by Bright Health).
- 2. Run Patient Search ► All Patients; keep list open.
- 3. Start the script; it iterates each patient, calling **Chart** ► **Print** ► **Entire Chart** which outputs a PDF.⁸
- 4. Resulting PDFs land in C:\MOISExports\YYYMMDD.

9. EMR Advantage (Canadian Health Systems)

- 1. Request a **CDS XML bulk export** from CHS Support (or run the *EMR Advantage Exporter* if installed).⁹
- 2. When the ZIP arrives, use the same **CDS-to-PDF Converter** as OSCAR.
- 3. Verify each output PDF via the *Validation* sheet provided.

10. Profile EMR (Intrahealth / HEALWELL AI)

Option A - Vendor-performed (recommended)

• Open a support ticket: "Please run a full chart PDF export for clinic (practice ID ###) and place on SFTP."

Option B – Self-service (summary only)

- 1. Medical Record ► Print ► Summary PDF; this includes core clinical data but *not* every scanned document.¹⁰
- 2. For full fidelity, export via CDS XML (Profile v7 or later) and convert with CDS-to-PDF.

Post-export integrity checks

- 1. File count equals active + inactive patients? (find . -name "*.pdf" | wc -l)
- 2. Spot-check 5 % of PDFs for:
 - Demographic header present
 - Progress notes legible
 - Labs, prescriptions, diagnostic images included
- 3. Retain SHA-256 checksum manifest in a separate secure location.

Footnotes & References

Change log

• v1.0 (2025-04-22) – Initial release.

End of Playbook

Footnotes

- Ocean Attachment Exporter for PS Suite "Creating a PDF Attachment..." OceanMD Help Article, Apr 2025 (<u>support.cognisantmd.com</u>) ← ←²
- 2. Patient Chart PDF Export Accuro Knowledge Base, Mar 2025 (<u>ahrtech.my.site.com</u>) <u>←</u>
- 3. "How to Export All Charts to PDF" WorldEMR Tips, Jul 20 2024 (worldemr.org) $\leftrightarrow \leftrightarrow^2$
- dr2dr Secure Messaging Manual Telus Med Access Tip Sheet, p. 83 (<u>healthquest.ca</u>)
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- 5. CHR Help Centre "User permission: Export Patient Chart" (<u>help.inputhealth.com</u>) $\leftrightarrow \leftrightarrow^2$
- Juno EMR Support "Details Page: print a patient's chart from the Summary page in PDF format" (<u>help.junoemr.com</u>)
 <u>←</u>
 <u>←</u>²
- 7. Avaros Help "Exporting Patient Records", Dec 5 2022 (<u>support.avaros.ca</u>) $\leftrightarrow \leftrightarrow^2$

- 10. Profile EMR User Help "Print the Medical Record" (Zendesk), Mar 2025 (vchprofileemr.zendesk.com) $\leftrightarrow \leftrightarrow^2$