

# Export Individual Patient C-CDA Files

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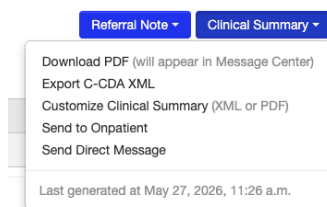
You can export a patient's clinical summary file — called a C-CDA — directly from their chart. You can also share it with your patient through OnPatient.

For details on exactly what data is included in a C-CDA file, see our [related article](#).

## How to Export a C-CDA File

Follow these steps from the patient's chart:

1. Open the patient's chart and click Clinical Dashboard from the left-hand menu.
2. Click the Clinical Summary button in the top-right area of the screen.
3. Choose Export C-CDA from the dropdown. The file will begin generating in the background — you can keep working while you wait.

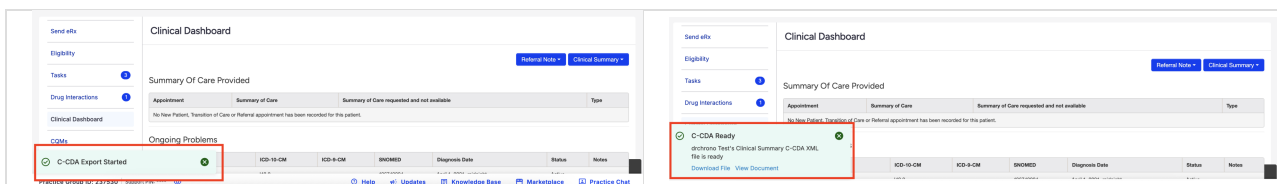


## What Happens After You Click Export

Once you click Export C-CDA, the file is created in the background so you don't have to wait on the page. When it's ready, a notification will pop up on your screen — no matter which page you've navigated to.

The notification will show the patient's name and give you two options:

- **View Document** — opens the C-CDA file in a new browser tab so you can review it on screen.
- **Download File** — saves the C-CDA file directly to your computer.



## Important Things to Know About the Notification

The notification will stay on your screen until you take action. Keep the following in mind:

- If you close the notification without clicking a link, the file will no longer be available. You will need to export the C-CDA again.
- If you don't take action and the file expires, you will also need to re-export it.
- The Export C-CDA button will be temporarily greyed out while the file is being generated. It will become clickable again once the process is complete.

## If Something Goes Wrong

If there's a problem generating the file, you'll see an error notification instead. It will include a Retry link – simply click it to start the process again.

**Clinical Dashboard**

Summary Of Care Provided

Appointment	Summary of Care	Summary of Care requested and not available	Type
No New Patient, Transition of Care or Referral appointment has been recorded for this patient.			

Ongoing Problems

Problem	ICD-10-CM	ICD-9-CM	SNOMED	Diagnosis Date	Status	Notes
Obstructive emphysema (disorder)	J43.9		16840004	July 23, 2018, midnight	Active	
Brittle asthma (disorder)	J45.901		225057002	July 23, 2018, midnight	Active	
Fibromyalgia (disorder)	M79.7		24693007	July 23, 2018, midnight	Active	
Generalized anxiety disorder (disorder)	F41.1		21897009	July 23, 2018, midnight	Active	
eye, mid stage	H40.1211	365.71		Oct. 27, 2015, midnight	Active	This is a test note.
	M25.541		1076721000119108	July 29, 2025, midnight	Active	This is an internal note.

**C-CDA Generation Failed**  
[ERROR HANDLING COMPONENT]  
[Retry](#)

## Other Export Options

In addition to the standard Export C-CDA option, the Clinical Summary dropdown also includes:

- **Customize Clinical Summary** — lets you choose which specific pieces of information to include before exporting. You can save it as either an XML or PDF file.

### Customize Your Clinical Summary

Select Which Data Elements To Include in Clinical Summary:

Data To Include in Clinical Summary	
<input checked="" type="checkbox"/>	Patient name:
<input checked="" type="checkbox"/>	Sex:
<input checked="" type="checkbox"/>	Birthdate:
<input checked="" type="checkbox"/>	Race:
<input checked="" type="checkbox"/>	Ethnicity:
<input checked="" type="checkbox"/>	Preferred language:
<input checked="" type="checkbox"/>	Smoking status:
<input checked="" type="checkbox"/>	Problems:
<input checked="" type="checkbox"/>	Medications:
<input checked="" type="checkbox"/>	Allergies:
<input checked="" type="checkbox"/>	Lab tests:
<input checked="" type="checkbox"/>	Vitals:
<input checked="" type="checkbox"/>	Care plan:
<input checked="" type="checkbox"/>	Procedures:
<input checked="" type="checkbox"/>	Immunizations:
<input checked="" type="checkbox"/>	Past appointments:
<input checked="" type="checkbox"/>	Future appointments:

[Create CQDA .xml](#) [Create PDF](#)

- **Download PDF** - will send the file to the **Message Center** ( ) for you to view, download or print.

### Incoming Messages ?

Mark as Read   Mark as Unread   Show Archived   [NEXT >](#)   Search Messages

<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: HAJE000001.pdf					April 21, 2021, 9:32 a.m.	April 21, 2021, 9:32 a.m.

- **Send to OnPatient** — (if enabled) will send the C-CDA file in a PDF format for the patient to download from their messages after logging in to their OnPatient account.
- **Send Direct Message** - Send a clinical summary securely via direct messaging to other providers or organizations that have direct messaging configured. Both the sender and recipient must have direct messaging enabled, as messages cannot be sent to a standard email address.

## Exporting from a Referral Note

The Export C-CDA option is also available from the Referral Note menu. It works exactly the same way – the file generates in the background and a notification appears when it's ready, with the same View Document and Download File options.

