

How to Export Data from Client Intake

1. After entering your inputs into Client Intake, you may have a requirement to export data for reporting purposes. The [Export] button can help.
2. To find the [Export] button, open Client Intake and look for it in the bottom row of buttons

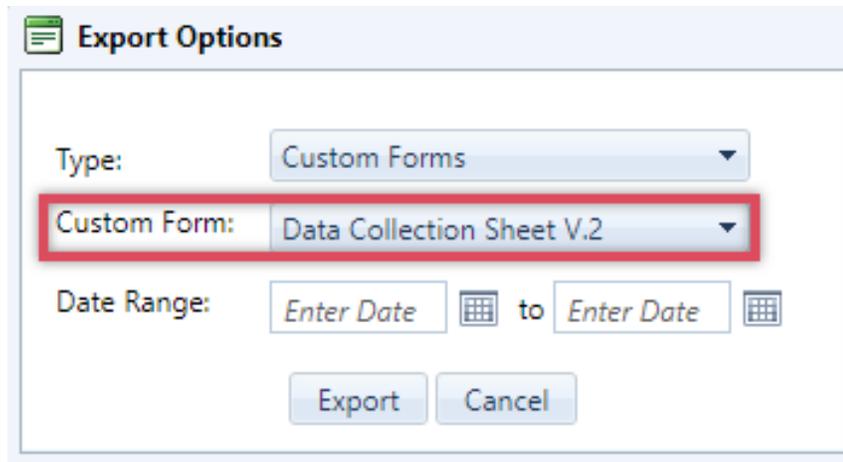
The screenshot shows the 'Client Intake' application window. At the top, there's a search section with radio buttons for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below this are input fields for 'Begins with or matches', 'Client Name', 'Level of Care', and 'Location', along with 'Search' and 'Display All' buttons. A table header is visible with columns: Name, DOB, Phone, SSN, Billing Ref #. Below the table is a row of tabs: Demographics, Case Management, Billing, Payers, Fee Schedule, Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. At the bottom, there's a row of buttons: Add New Client, Admit Client, Delete Client, Print, File and Sign, Referral Source Setup, Export (highlighted with a red box), and Close. A red arrow points from the 'Client Intake' title bar to the 'Export' button.

3. Upon clicking the [Export] button you will be presented with a list of export options related to the tabs found in Client Intake.

The 'Export Options' dialog box is shown. It has a title bar with a menu icon and the text 'Export Options'. Below the title bar, there are three labels: 'Type:', 'Custom Form:', and 'Date Range:'. The 'Type:' dropdown menu is open, showing a list of options: 'Custom Forms', 'Referral Records', 'Referral Sources', 'Payer Plans', 'Fee Schedule', 'Intake (Demographics, Case Management, Billing, AI/AN, Comments)', and 'Multi-Dimensional Assessment'. The 'Custom Form:' field is currently empty. The 'Date Range:' field is also empty. The dialog box is partially obscured by other elements in the background.

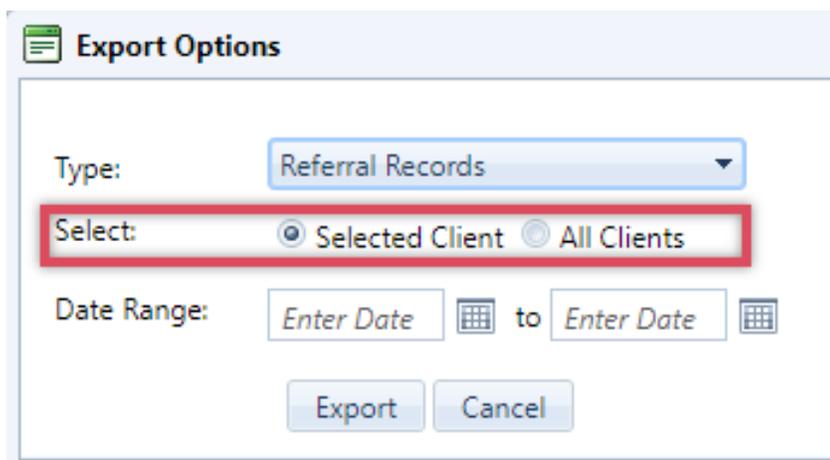
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4. After selecting from the picklist under type you will be required to make various choices before exporting.
 - a. **When choosing Type: Custom Forms** you are required to select a form from the Custom Form dropdown picklists with the Date Range optional



The screenshot shows the 'Export Options' dialog box. The 'Type' dropdown is set to 'Custom Forms'. The 'Custom Form' dropdown is highlighted with a red box and set to 'Data Collection Sheet V.2'. The 'Date Range' section has two 'Enter Date' fields with calendar icons, separated by 'to'. At the bottom are 'Export' and 'Cancel' buttons.

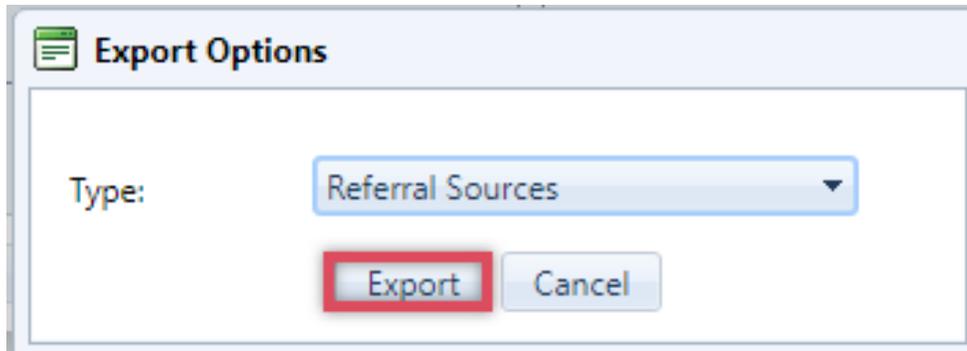
- b. **When choosing Type: Referral Records** you can pull a report for the selected client or All Clients with the Date Range optional



The screenshot shows the 'Export Options' dialog box. The 'Type' dropdown is set to 'Referral Records'. The 'Select' section is highlighted with a red box and has two radio buttons: 'Selected Client' (which is selected) and 'All Clients'. The 'Date Range' section has two 'Enter Date' fields with calendar icons, separated by 'to'. At the bottom are 'Export' and 'Cancel' buttons.

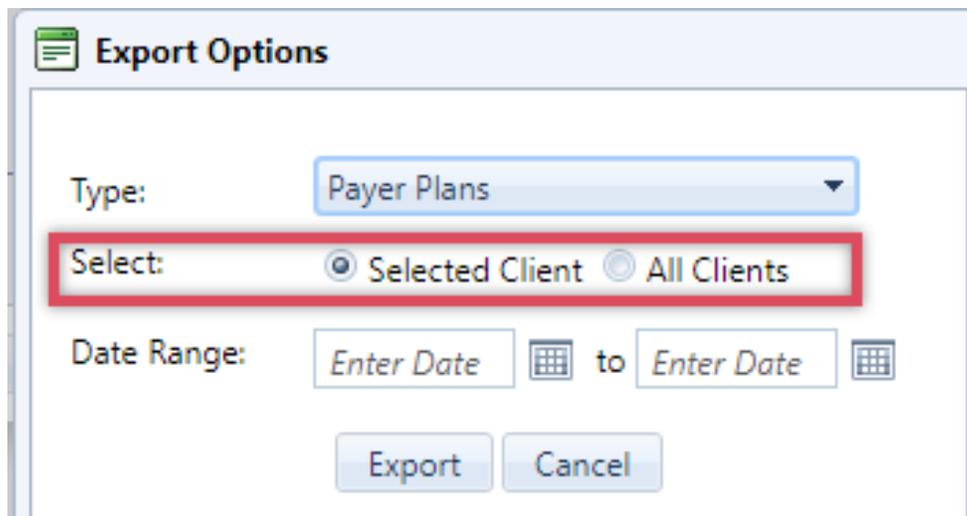
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- c. When choosing **Type: Referral Sources** click [Export] button for your report.



The screenshot shows a dialog box titled "Export Options" with a green menu icon. It contains a "Type:" label followed by a dropdown menu set to "Referral Sources". Below the dropdown are two buttons: "Export" and "Cancel". The "Export" button is highlighted with a red rectangular border.

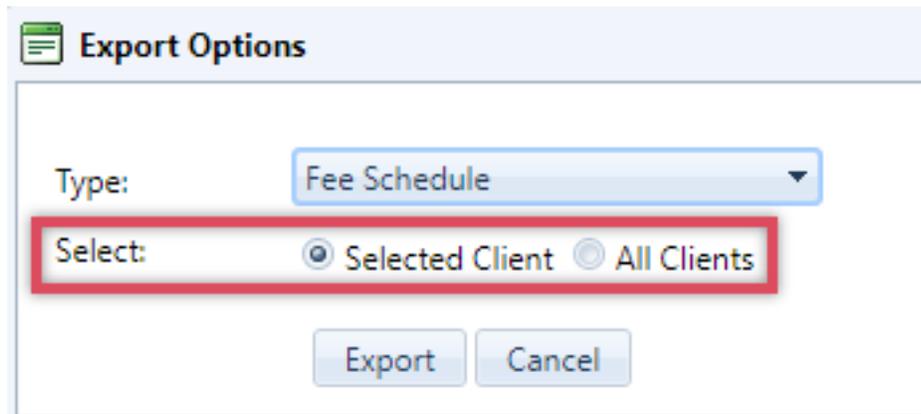
- d. When choosing **Type: Payer Plans** you can pull a report for the selected client or All Clients with the Date Range optional



The screenshot shows a dialog box titled "Export Options" with a green menu icon. It contains a "Type:" label followed by a dropdown menu set to "Payer Plans". Below the dropdown is a "Select:" label followed by two radio buttons: "Selected Client" (which is selected) and "All Clients". Below this is a "Date Range:" label followed by two "Enter Date" input fields with calendar icons, separated by the word "to". At the bottom are two buttons: "Export" and "Cancel". A red rectangular border highlights the "Select:" section, including the radio buttons.

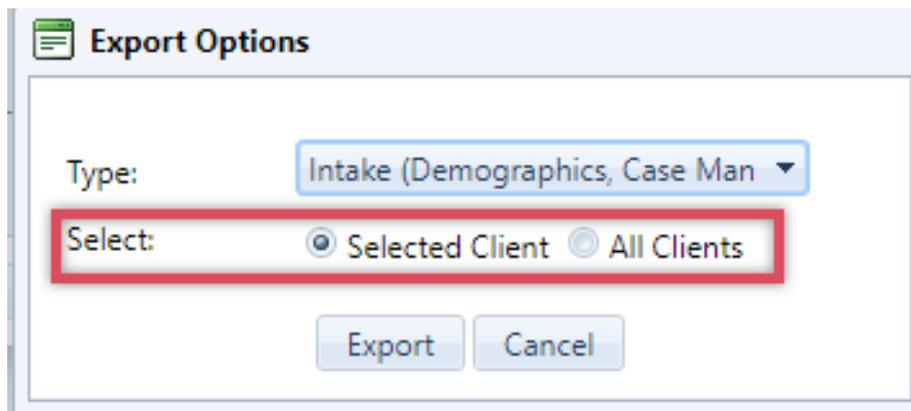
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e. **When choosing Type: Fee Schedule** you can pull a report for the selected client or All Clients



The screenshot shows a dialog box titled "Export Options". It contains a "Type:" dropdown menu set to "Fee Schedule". Below it, a "Select:" section is highlighted with a red box, containing two radio button options: "Selected Client" (which is selected) and "All Clients". At the bottom of the dialog are "Export" and "Cancel" buttons.

f. **When choosing Type: Intake (Demographics)** you can pull a report for the selected client or All Clients



The screenshot shows a dialog box titled "Export Options". It contains a "Type:" dropdown menu set to "Intake (Demographics, Case Man)". Below it, a "Select:" section is highlighted with a red box, containing two radio button options: "Selected Client" (which is selected) and "All Clients". At the bottom of the dialog are "Export" and "Cancel" buttons.

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g. When choosing **Type: Multi-Dimensional Assessments** you are given a choice of Population type and Select Client or All Clients with Date Range as optional

Export Options

Type: Multi-Dimensional Assessment

Population Type: Adult

Select: Selected Client All Clients

Date Range: Enter Date to Enter Date

Export Cancel