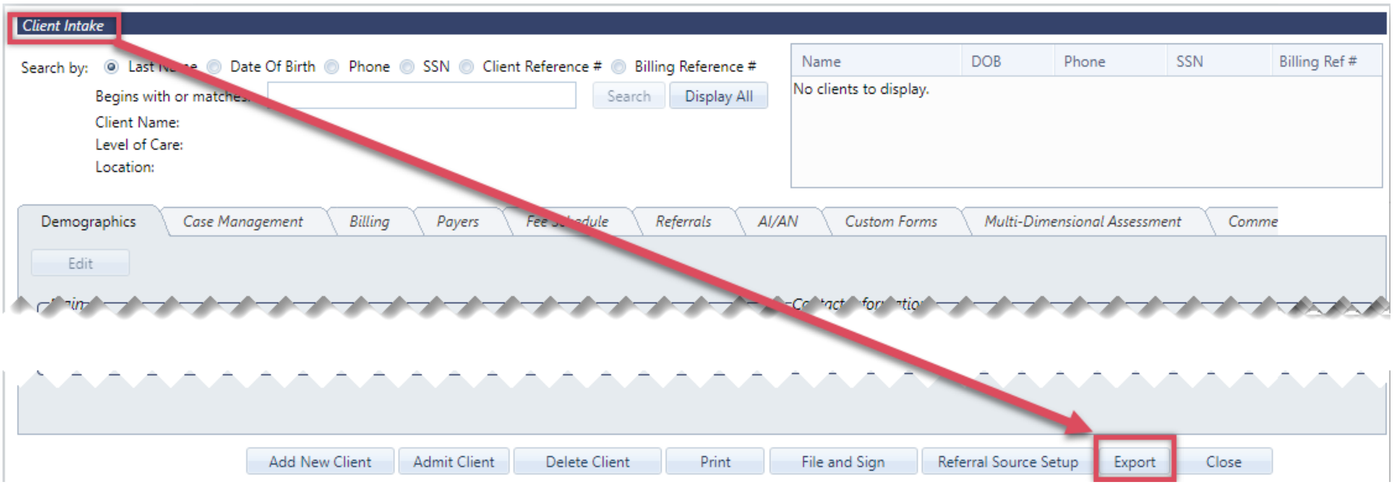
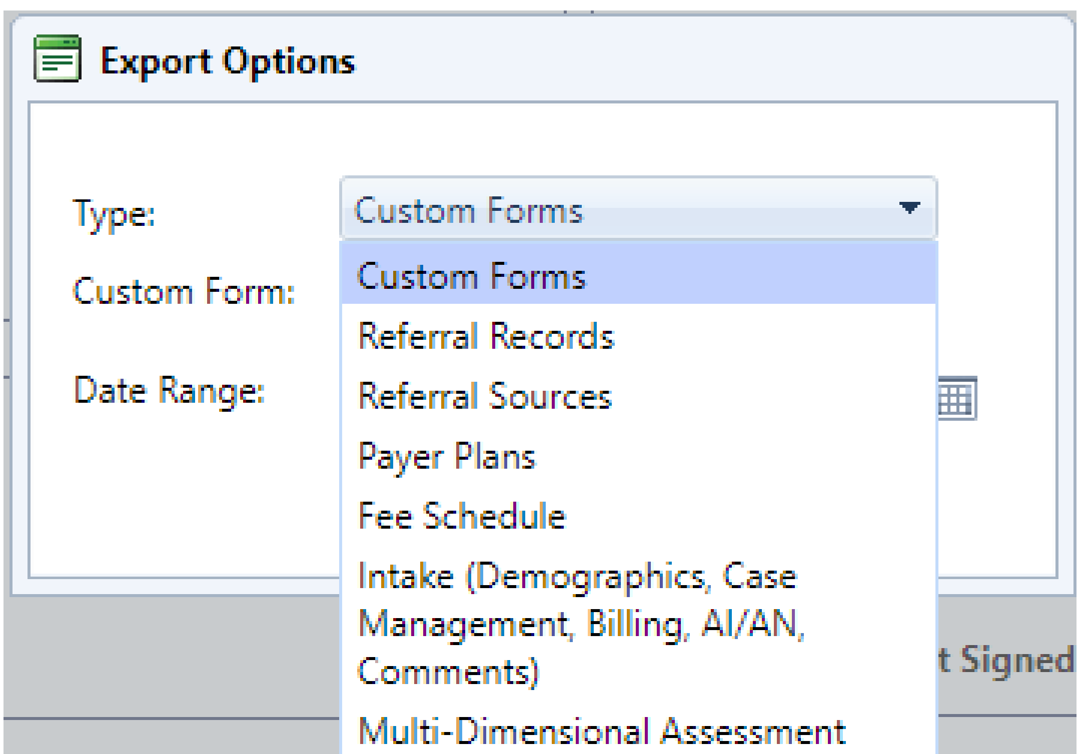
# How to Export Data from Client Intake

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

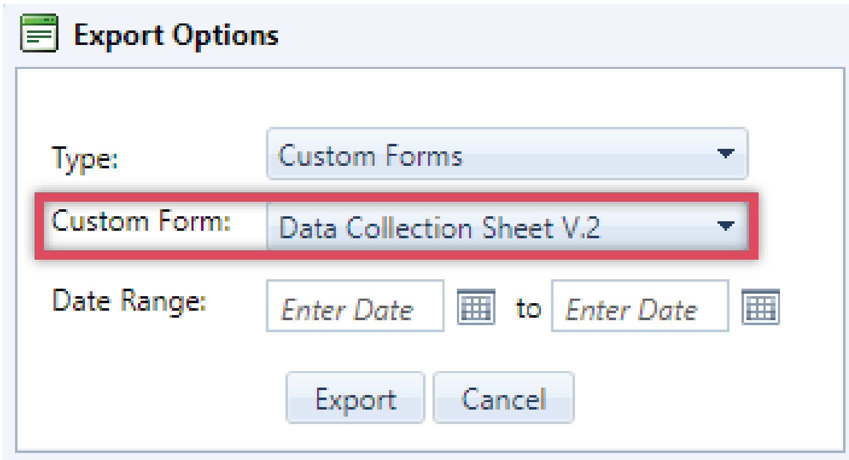



3. Upon clicking the [Export] button you will be presented with a list of export options related to the tabs found in Client Intake.

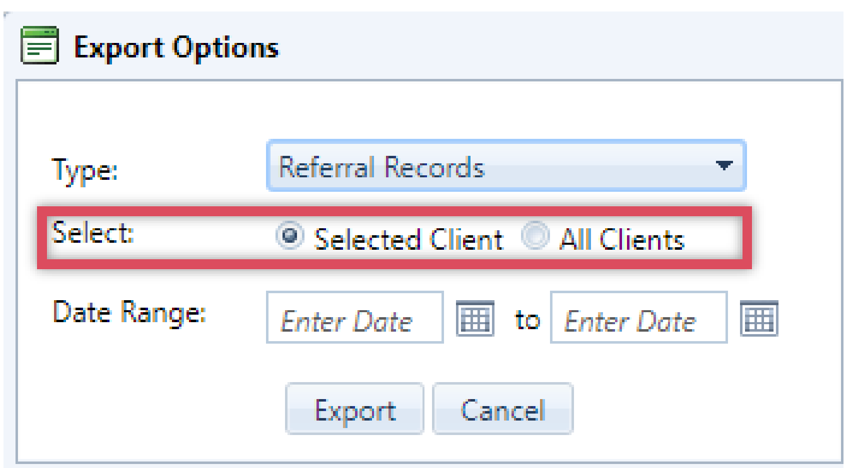


**4.** After selecting from the picklist under type you will be required to make various choices before exporting.

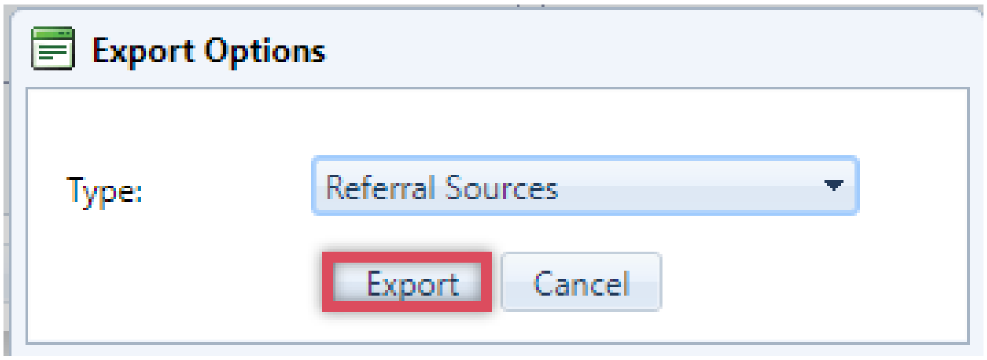
a. **When choosing Type: Custom Forms** you are required to select a form from the Custom Form dropdown picklists with the Date Range optional



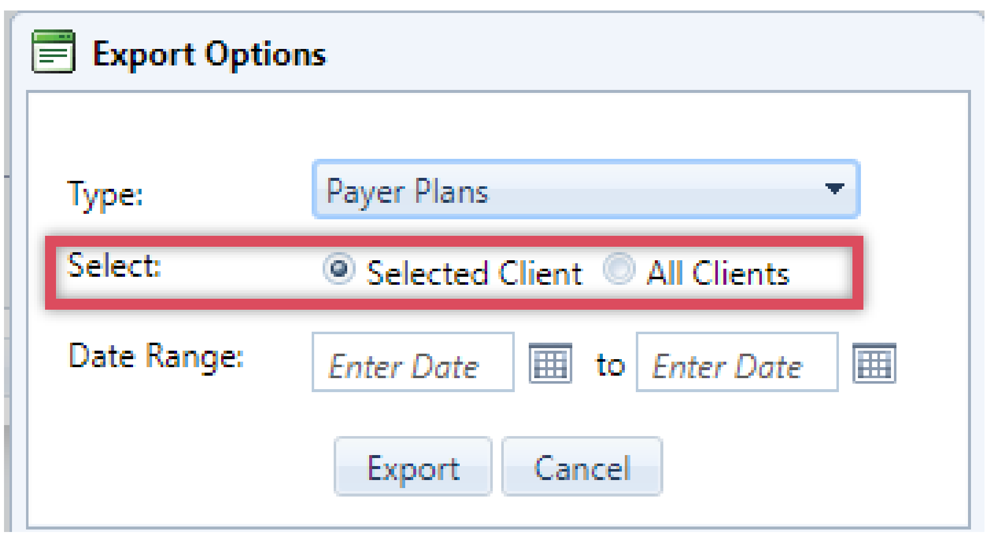

b. **When choosing Type: Referral Records** you can pull a report for the selected client or All Clients with the Date Range optional



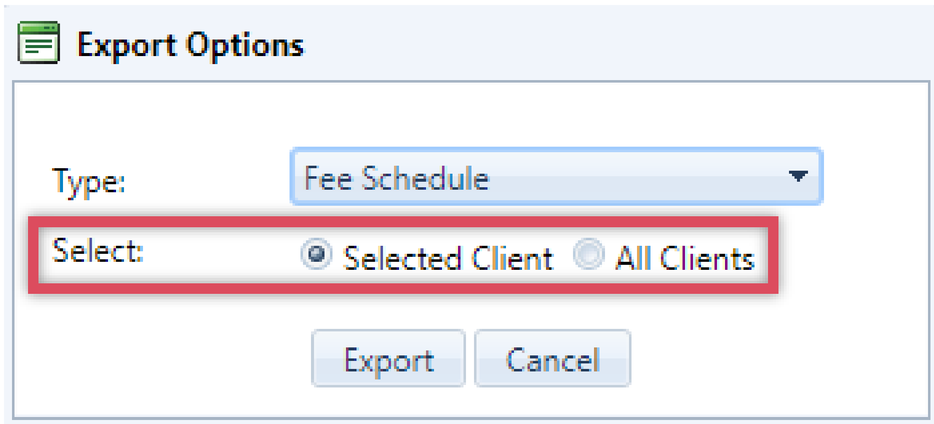
c. **When choosing Type: Referral Sources** click [Export] button for your report.



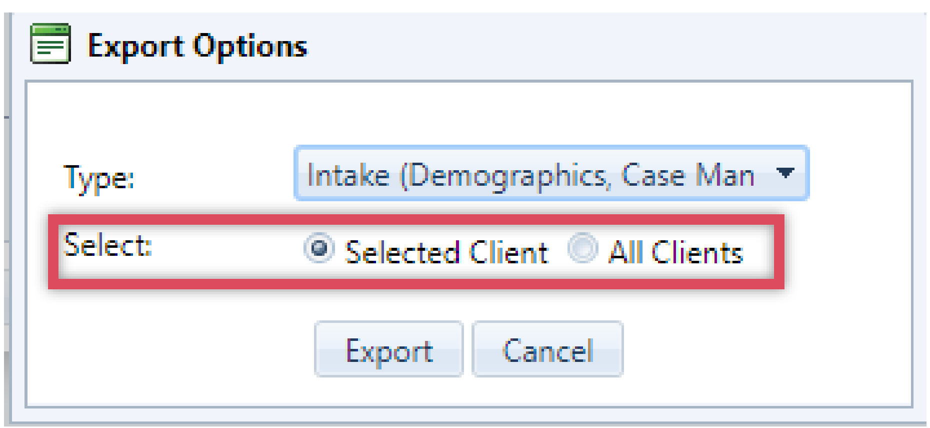

d. **When choosing Type: Payer Plans** you can pull a report for the selected client or All Clients with the Date Range optional



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




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



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