

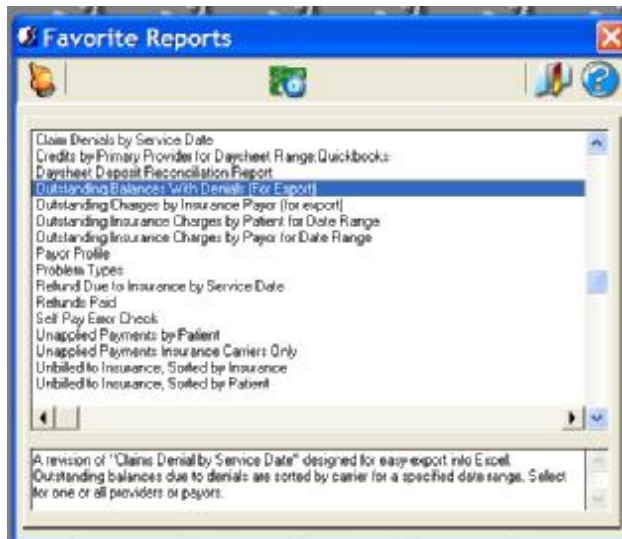


Synergistic Office Solutions, Inc.

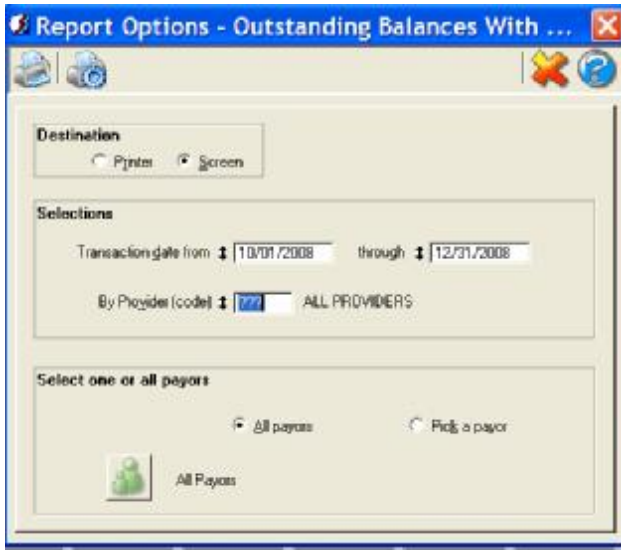
Topic: Exporting SOS Reports to Excel
Document ID: #801
Product: All
Date: May 19, 2009
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Blue Ridge Behavioral Health Services

[The following article is supplemental documentation that Dr. Pollack created for his office staff. Although meant as a companion for specific reports that he created or modified to be especially Excel-friendly, the general approach will work with any of the simpler, spreadsheet-style reports that come with the SOS applications.]

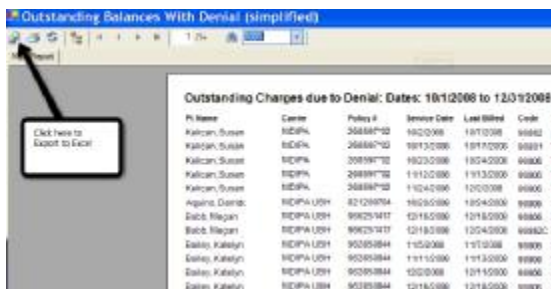
- In SOS, go to Reports > Favorites and select one of the SOS Export reports:



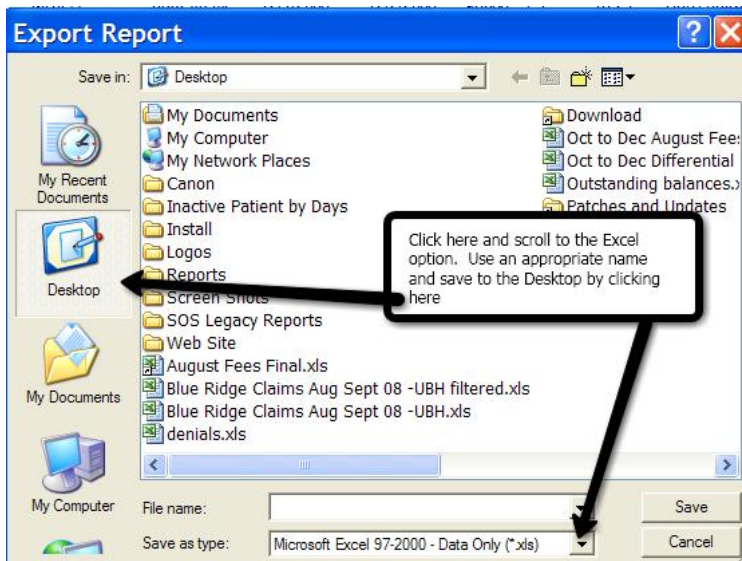
- Enter the appropriate criteria and run the report:



- Click on the Export Button:



- At the next screen, click on the desktop option on the right, scroll to the Excel output type, enter an appropriate name, and click on save:



- The Export complete dialogue will appear:

1634338	12/16/2008	12/18/2008	90801	LP
1634338	12/2/2008	12/11/2008	90806	CSK
1634338	12/10/2008	12/11/2008	90806	CSK
2521600				TP
2521600				TP
2521600				TP
2521600				TP
2521600				TP
1910275				DH
1910275				DH
1910275				DH
2432859	10/7/2008	10/17/2008	90862C	BB
3560502	12/18/2008	12/24/2008	90806	DH
3386328	12/23/2008	12/24/2008	90862C	BB



- Close out of SOS and open the file from your desktop:



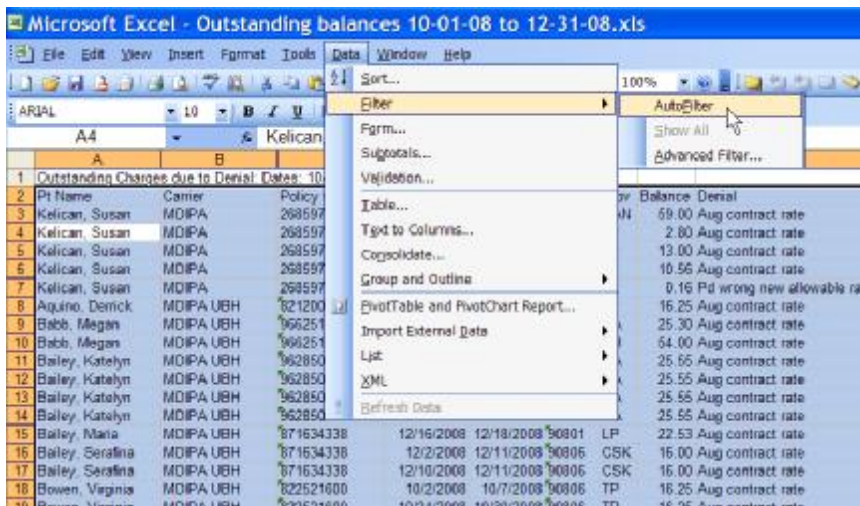
- After the report opens, widened the columns so that all the data appears:

Microsoft Excel - Outstanding balances 10-01-08 to 12-31-08.xls												
File Edit View Insert Format Tools Data Window Help												
Arial 10												
A1 Outstanding Charges due to Denial: Dates: 10/1/2008 to												
A	B	C	D	E	F	G	H	I	J	K	L	M
1	Outstanding Charges due to Denial: Dates: 10/1/2008 to 12/31/2008											
2	Pt Nam	Carrier	Policy #	Service	Last Bill	Code	Prov	Balance	Denial			
3	Kelican	MDIPA	268597	#####	#####	90862	DAN	59.00	Aug contract rate			
4	Kelican	MDIPA	268597	#####	#####	90801	TP	2.80	Aug contract rate			
5	Kelican	MDIPA	268597	#####	#####	90806	TP	13.00	Aug contract rate			
6	Kelican	MDIPA	268597	#####	#####	90806	TP	10.56	Aug contract rate			
7	Kelican	MDIPA	268597	#####	#####	90806	TP	0.16	Pd wrong new allowable rate			
8	Aquino	MDIPA	821200	#####	#####	90806	TP	16.25	Aug contract rate			
9	Babb	MDIPA	966251	#####	#####	90806	BA	25.30	Aug contract rate			
10	Babb	MDIPA	966251	#####	#####	90862C	BB	54.00	Aug contract rate			
11	Bailey	MDIPA	962850	#####	#####	90806	BA	25.55	Aug contract rate			
12	Bailey	MDIPA	962850	#####	#####	90806	BA	25.55	Aug contract rate			
13	Bailey	MDIPA	962850	#####	#####	90806	BA	25.55	Aug contract rate			
14	Bailey	MDIPA	962850	#####	#####	90806	BA	25.55	Aug contract rate			
15	Bailey	MDIPA	871634	#####	#####	90801	LP	22.53	Aug contract rate			
16	Bailey	MDIPA	871634	#####	#####	90806	CSK	16.00	Aug contract rate			

- With the data visible, highlight everything except for the top row:

Outstanding Charges due to Denial Dates: 10/1/2008 to 12/31/2008									
Pt Name	Carrier	Policy #	Service Cat	Last Bill Date	Code	Prov	Balance	Denial	
Kelican, Susan	MDIPA	268597102	10/2/2008	10/7/2008	90802	DAN	59.00	Aug contract rate	
Kelican, Susan	MDIPA	268597102	10/13/2008	10/17/2008	90801	TP	2.00	Aug contract rate	
Kelican, Susan	MDIPA	268597102	10/25/2008	10/24/2008	90806	TP	13.00	Aug contract rate	
Kelican, Susan	MDIPA	268597102	11/12/2008	11/13/2008	90806	TP	18.55	Aug contract rate	
Kelican, Susan	MDIPA	268597102	11/24/2008	12/3/2008	90806	TP	10.55	Aug contract rate	
Aquino, Demick	MDIPA UBH	821200704	10/20/2008	10/24/2008	90806	TP	0.16	Pd wrong new allowable rate	
Aquino, Demick	MDIPA UBH	821200704	10/20/2008	10/24/2008	90806	TP	16.25	Aug contract rate	
Babb, Megan	MDIPA UBH	962850444	12/16/2008	12/18/2008	90806	DA	25.30	Aug contract rate	
Babb, Megan	MDIPA UBH	962850444	12/16/2008	12/24/2008	90806	DA	54.00	Aug contract rate	
Bailey, Katelyn	MDIPA UBH	962850444	11/5/2008	11/7/2008	90806	BA	25.55	Aug contract rate	
Bailey, Katelyn	MDIPA UBH	962850444	11/11/2008	11/13/2008	90806	BA	25.55	Aug contract rate	
Bailey, Katelyn	MDIPA UBH	962850444	12/2/2008	12/11/2008	90806	BA	25.55	Aug contract rate	
Bailey, Katelyn	MDIPA UBH	962850444	12/16/2008	12/18/2008	90806	BA	25.55	Aug contract rate	
Bailey, Maria	MDIPA UBH	871634338	12/16/2008	12/18/2008	90801	LP	22.53	Aug contract rate	
Bailey, Serafina	MDIPA UBH	871634338	12/2/2008	12/11/2008	90806	CSK	16.00	Aug contract rate	
Bailey, Serafina	MDIPA UBH	871634338	12/10/2008	12/11/2008	90806	CSK	16.00	Aug contract rate	
Bowen, Virginia	MDIPA UBH	822521500	10/2/2008	10/7/2008	90806	TP	16.25	Aug contract rate	
Bowen, Virginia	MDIPA UBH	822521500	10/24/2008	10/31/2008	90806	TP	16.25	Aug contract rate	
Bowen, Virginia	MDIPA UBH	822521500	11/13/2008	11/20/2008	90806	TP	16.25	Aug contract rate	

- Go to Data > Filter > Auto filter and select Auto Filter:



- The following changes will be made to the report:

Pt Name	Carrier	Policy #	Service Cat	Last Bill Date	Code	Prov	Balance	Denial
Kelican, Susan	MDIPA	268597102	10/2/2008	11/7/2008	90802	DAN	59.00	Aug contract rate
Kelican, Susan	MDIPA	268597102	10/13/2008	10/17/2008	90801	TP	2.00	Aug contract rate
Kelican, Susan	MDIPA	268597102	10/25/2008	10/24/2008	90806	TP	13.00	Aug contract rate
Kelican, Susan	MDIPA	268597102	11/12/2008	11/13/2008	90806	TP	18.55	Aug contract rate
Kelican, Susan	MDIPA	268597102	11/24/2008	12/3/2008	90806	TP	10.55	Aug contract rate
Aquino, Demick	MDIPA UBH	821200704	10/20/2008	10/24/2008	90806	TP	0.16	Pd wrong new allowable rate
Aquino, Demick	MDIPA UBH	821200704	10/20/2008	10/24/2008	90806	TP	16.25	Aug contract rate
Babb, Megan	MDIPA UBH	962850444	12/16/2008	12/18/2008	90806	DA	25.30	Aug contract rate
Babb, Megan	MDIPA UBH	962850444	12/16/2008	12/24/2008	90806	DA	54.00	Aug contract rate
Bailey, Katelyn	MDIPA UBH	962850444	11/5/2008	11/7/2008	90806	BA	25.55	Aug contract rate
Bailey, Katelyn	MDIPA UBH	962850444	11/11/2008	11/13/2008	90806	BA	25.55	Aug contract rate
Bailey, Katelyn	MDIPA UBH	962850444	12/2/2008	12/11/2008	90806	BA	25.55	Aug contract rate
Bailey, Katelyn	MDIPA UBH	962850444	12/16/2008	12/18/2008	90806	BA	25.55	Aug contract rate
Bailey, Maria	MDIPA UBH	871634338	12/16/2008	12/18/2008	90801	LP	22.53	Aug contract rate
Bailey, Serafina	MDIPA UBH	871634338	12/2/2008	12/11/2008	90806	CSK	16.00	Aug contract rate
Bailey, Serafina	MDIPA UBH	871634338	12/10/2008	12/11/2008	90806	CSK	16.00	Aug contract rate
Bowen, Virginia	MDIPA UBH	822521500	10/2/2008	10/7/2008	90806	TP	16.25	Aug contract rate
Bowen, Virginia	MDIPA UBH	822521500	10/24/2008	10/31/2008	90806	TP	16.25	Aug contract rate
Bowen, Virginia	MDIPA UBH	822521500	11/13/2008	11/20/2008	90806	TP	16.25	Aug contract rate
Bowen, Virginia	MDIPA UBH	822521500	12/16/2008	12/24/2008	90806	TP	16.25	Aug contract rate
Blockdorff, Ryan	MDIPA UBH	951910275	11/19/2008	11/28/2008	90846	DH	35.50	Aug contract rate
Blockdorff, Ryan	MDIPA UBH	951910275	12/2/2008	12/11/2008	90806	DH	25.55	Aug contract rate
Blockdorff, Ryan	MDIPA UBH	951910275	12/16/2008	12/24/2008	90806	DH	25.55	Aug contract rate

- The sorting arrows can be used to create custom sorts of the data.