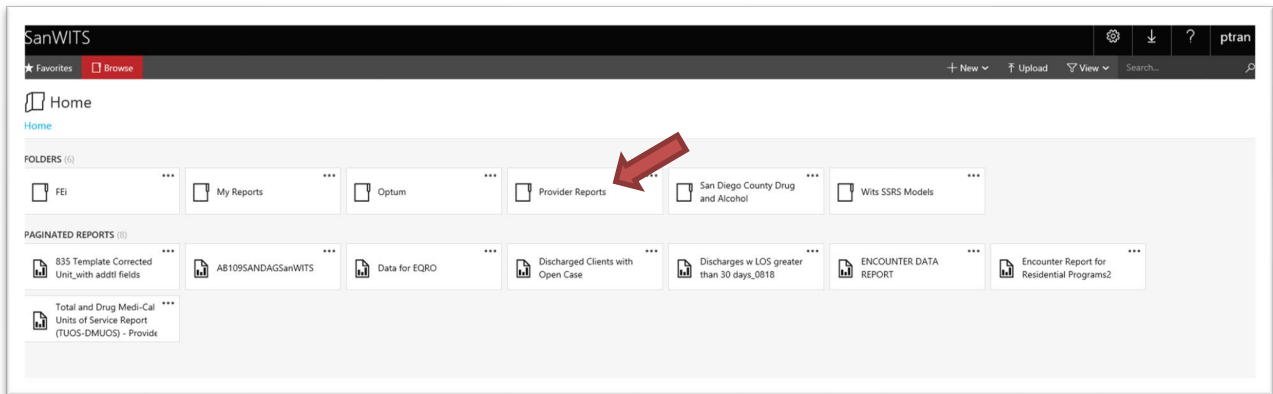


County of San Diego Behavioral Health Services
TUOS Claim Summary Report Tip Sheet
How to Pull Report from SSRS and Save as Excel file

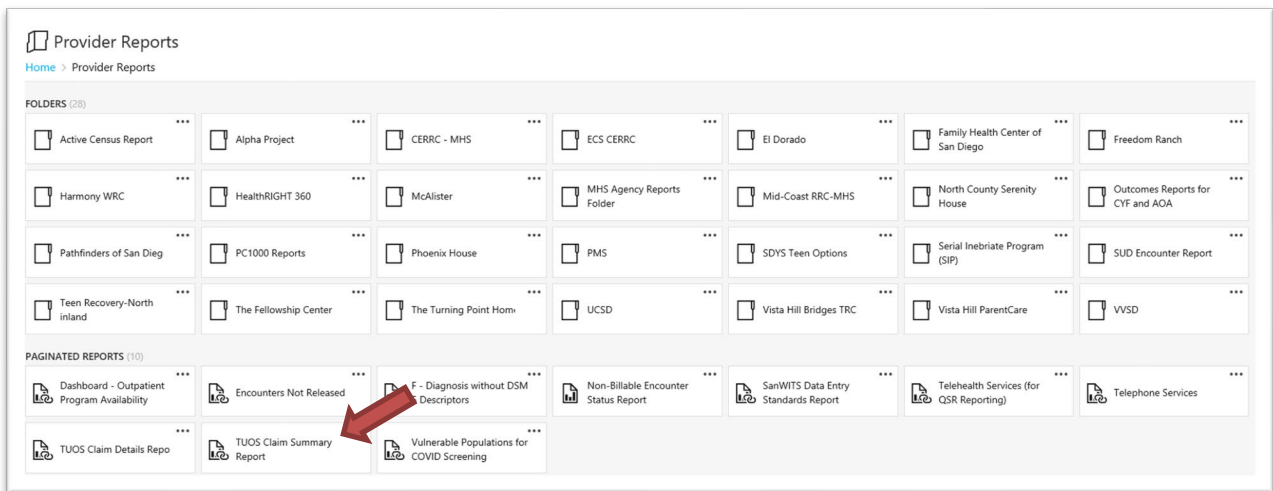
1. Log in to **SanWITS**.
2. Click on **SSRS Reports** on the right (below Username and left of Snapshot).



3. On Home screen, open **Provider Reports** folder.



4. In Provider Reports folder, open **TUOS Claim Summary Report**.



County of San Diego Behavioral Health Services
TUOS Claim Summary Report Tip Sheet
How to Pull Report from SSRS and Save as Excel file

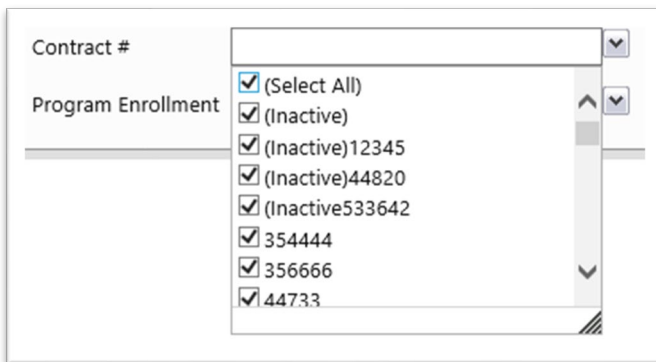
5. Wait for screen to load and a prompt bar will display.



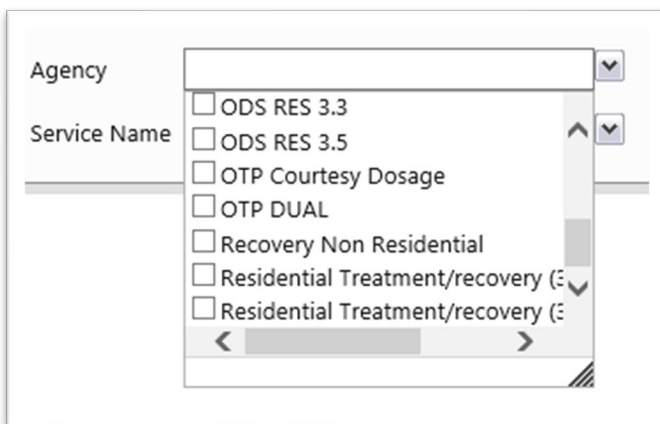
6. Type in **Service Date From** and **To** or click on the Calendar button to choose the date.



7. Select a contract from the **Contract #** dropdown. You can also leave this at default (**Select All**) if you do not know the contract number.

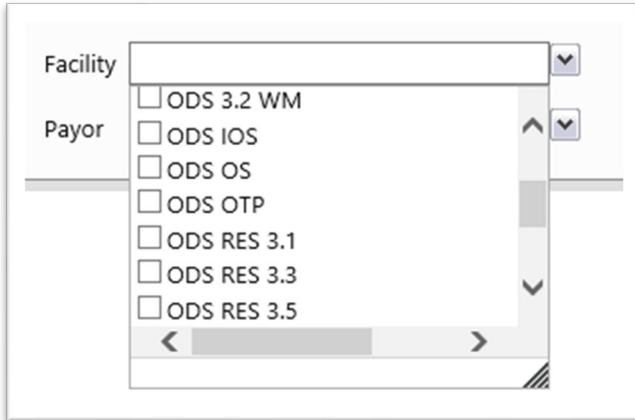


8. Select an agency from the **Agency** dropdown.



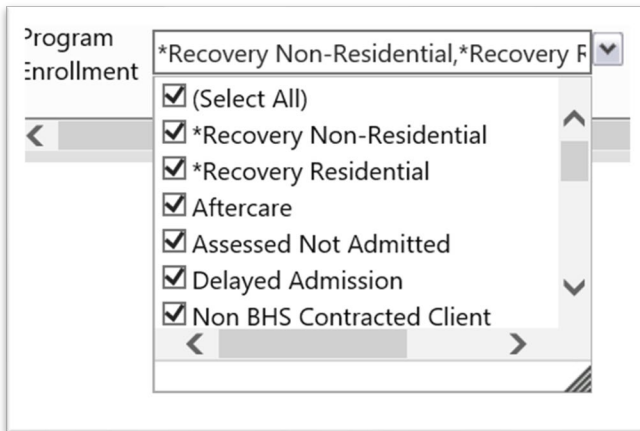
County of San Diego Behavioral Health Services
TUOS Claim Summary Report Tip Sheet
How to Pull Report from SSRS and Save as Excel file

9. Select a facility from **Facility** dropdown.



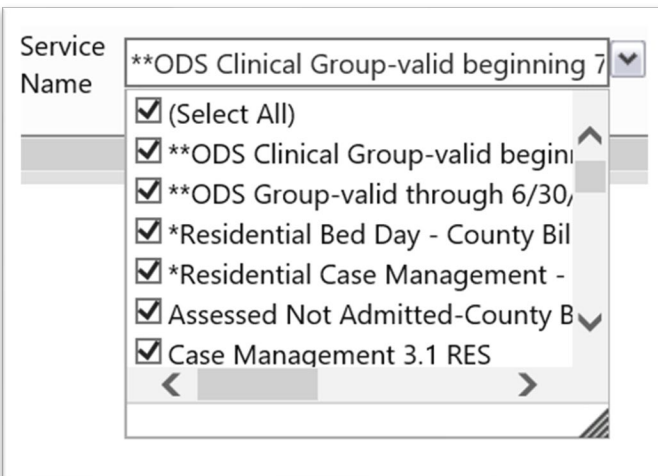
A screenshot of a dropdown menu for the 'Facility' field. The menu is open, showing a list of options with checkboxes to the left. The options are: ODS 3.2 WM, ODS IOS, ODS OS, ODS OTP, ODS RES 3.1, ODS RES 3.3, and ODS RES 3.5. The 'Facility' label is to the left of the dropdown, and the 'Payor' label is below it. The dropdown has a scroll bar on the right and navigation arrows at the bottom.

10. Select a program enrollment (modality) from **Program Enrollment** dropdown. You can also leave this at default (**Select All**).



A screenshot of a dropdown menu for the 'Program Enrollment' field. The menu is open, showing a list of options with checkboxes to the left. The options are: (Select All), *Recovery Non-Residential, *Recovery Residential, Aftercare, Assessed Not Admitted, Delayed Admission, and Non BHS Contracted Client. The 'Program Enrollment' label is to the left of the dropdown. The dropdown has a scroll bar on the right and navigation arrows at the bottom.

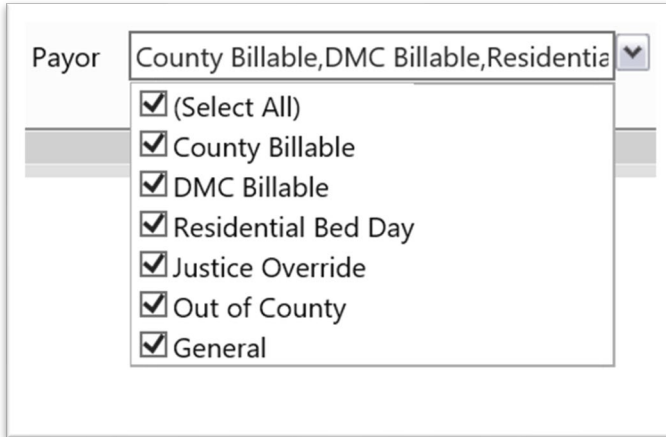
11. Select a service from **Service Name** dropdown. You can also leave this at default (**Select All**).



A screenshot of a dropdown menu for the 'Service Name' field. The menu is open, showing a list of options with checkboxes to the left. The options are: (Select All), **ODS Clinical Group-valid beginning 7, **ODS Group-valid through 6/30, *Residential Bed Day - County Bil, *Residential Case Management - Assessed Not Admitted-County B, and Case Management 3.1 RES. The 'Service Name' label is to the left of the dropdown. The dropdown has a scroll bar on the right and navigation arrows at the bottom.

County of San Diego Behavioral Health Services
TUOS Claim Summary Report Tip Sheet
How to Pull Report from SSRS and Save as Excel file

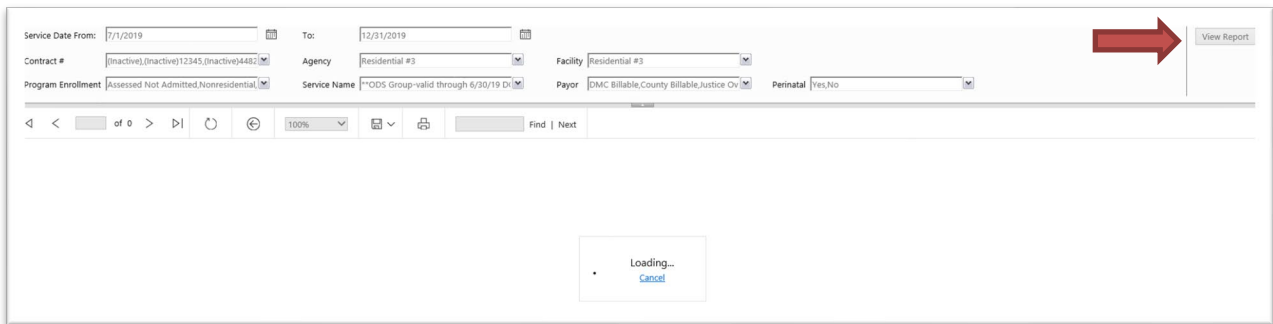
12. Select a payor type from **Payor** dropdown. You can also leave this at default (**Select All**).



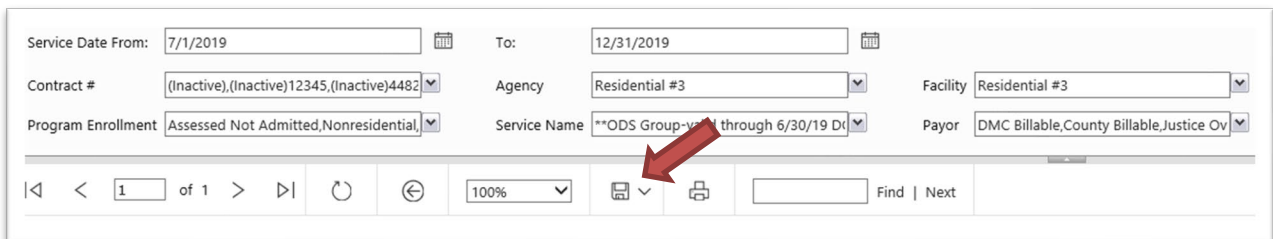
13. Select "Yes" or "No" from **Perinatal** dropdown.



14. Click on **View Report** and wait for report to load (may take a few minutes).



15. After report fully loads, click on **Save** dropdown on the Menu bar (below the Prompt bar)



16. Select save file in **Excel** format.

County of San Diego Behavioral Health Services
TUOS Claim Summary Report Tip Sheet
How to Pull Report from SSRS and Save as Excel file

