

**Behavioral Health Services
QUALITY IMPROVEMENT – MIS MEMO**

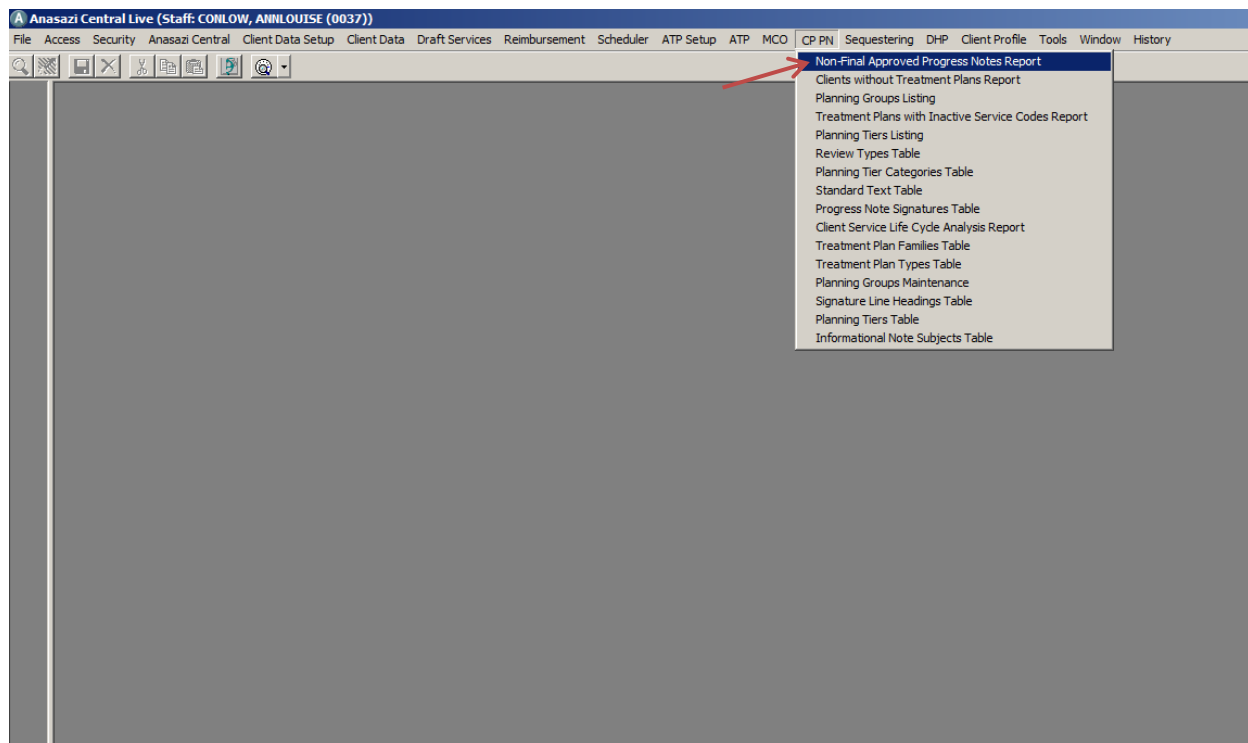
To: County Mental Health System of Care Providers

From: AnnLouise Conlow, BHS Senior MIS Manager

Re: Saving CCBH Canned Reports to a Spreadsheet

MIS has established the following process for saving CCBH canned reports to a spreadsheet.

Select the report to print to a spreadsheet.

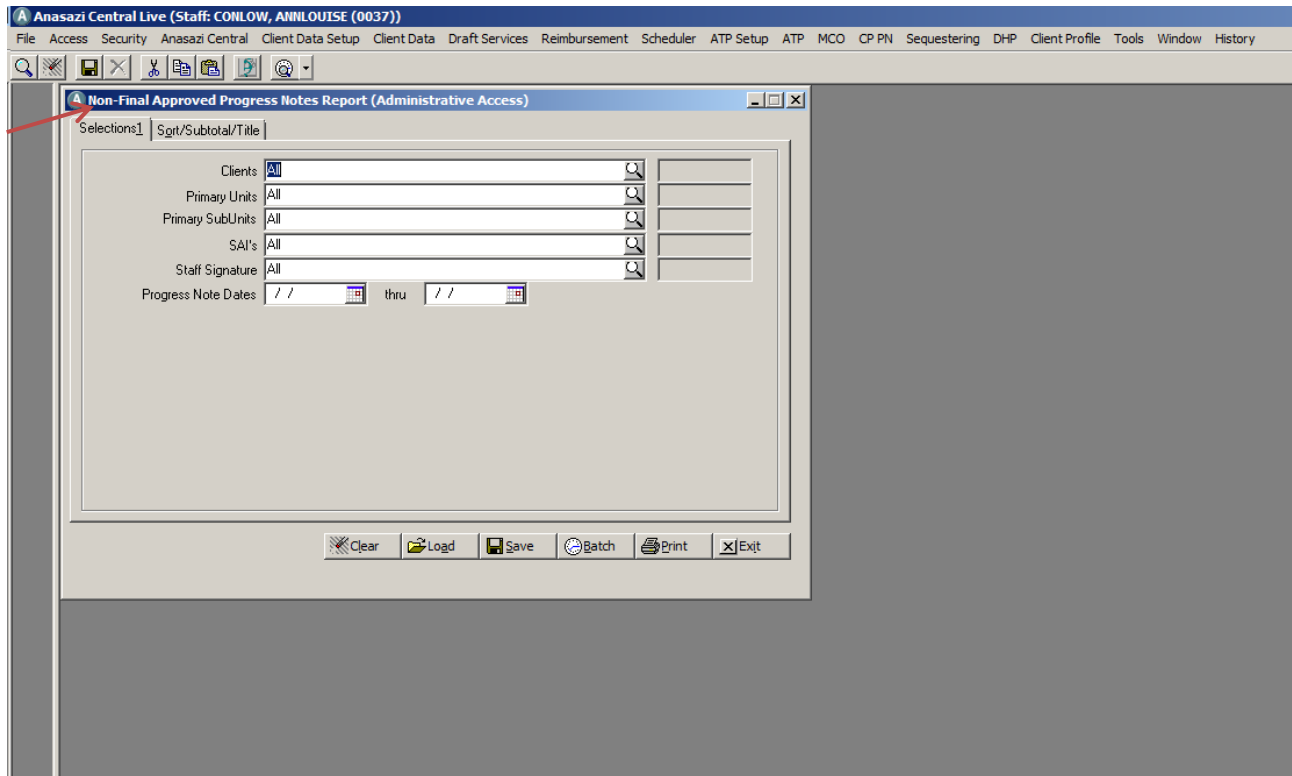


The example shows the selection for the Non-Final Approved Progress Notes Report.

The report dialog window will appear.

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Complete each tab for the report.



In this example, the Non-Final Approved Progress Notes (Administrative Access) dialog window shows tabs for Selections and Sort/Subtotal/Title. Tabs for reports will vary and can include tabs for Selections, Print Columns, and Sort/Subtotal/Title.

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Select the Sort/Subtotal/Title tab for the report.

Selections1 | Sort/Subtotal/Title |

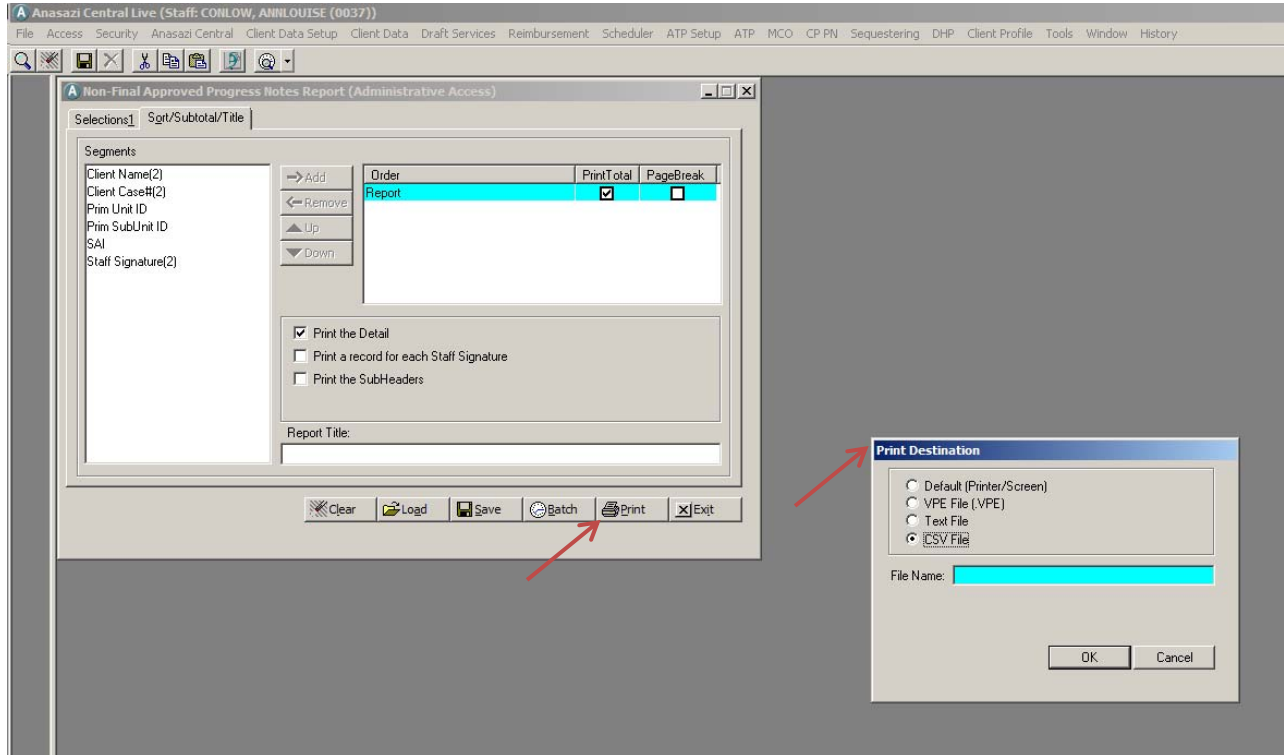
Clients	All	
Primary Units	All	
Primary SubUnits	All	
SAI's	All	
Staff Signature	All	

Progress Note Dates: / / thru / /

Clear Load Save Batch Print Exit

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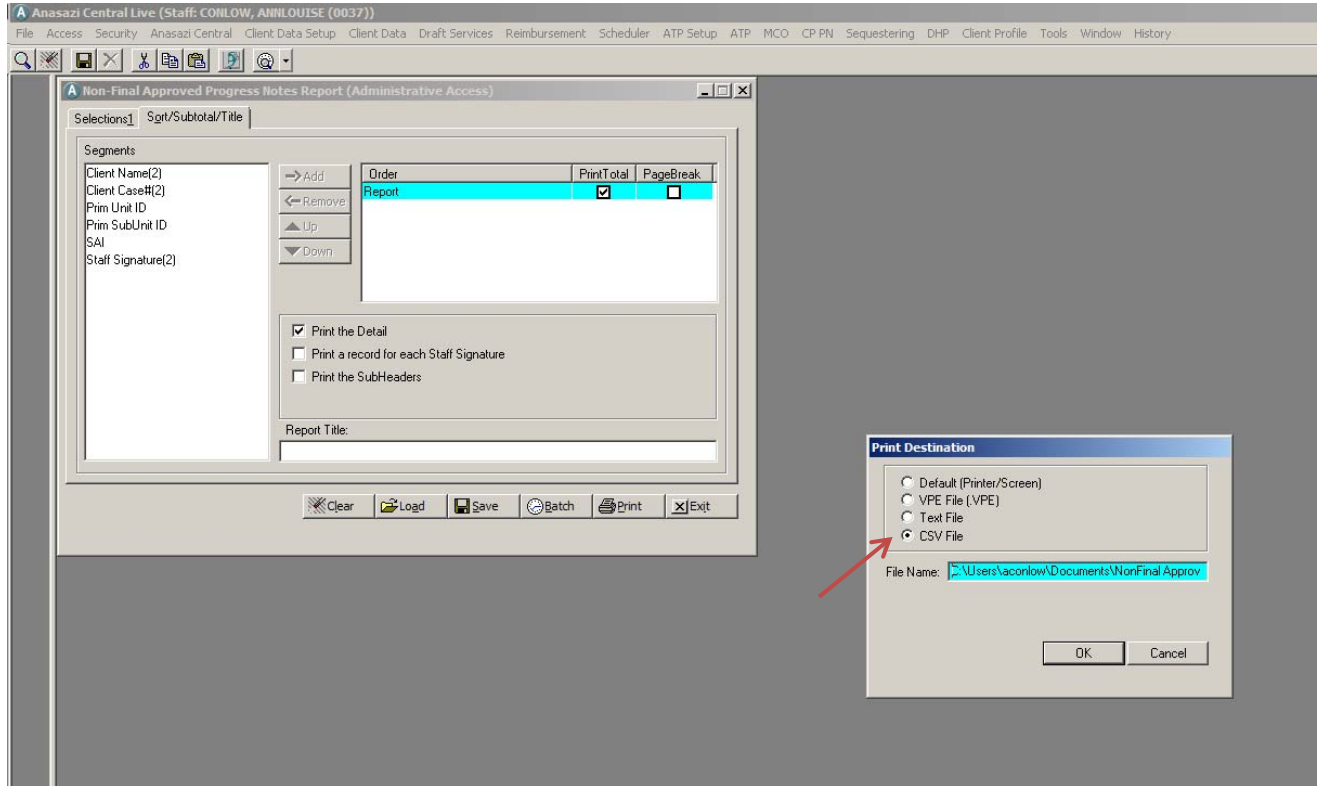
Select Print.



The Print Destination dialog window will appear.

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Select the CSV File radio/option button.



CSV is the file extension for a spreadsheet and choosing this option will print the report to a spreadsheet.

Note: Not all canned reports will have the CSV print option.

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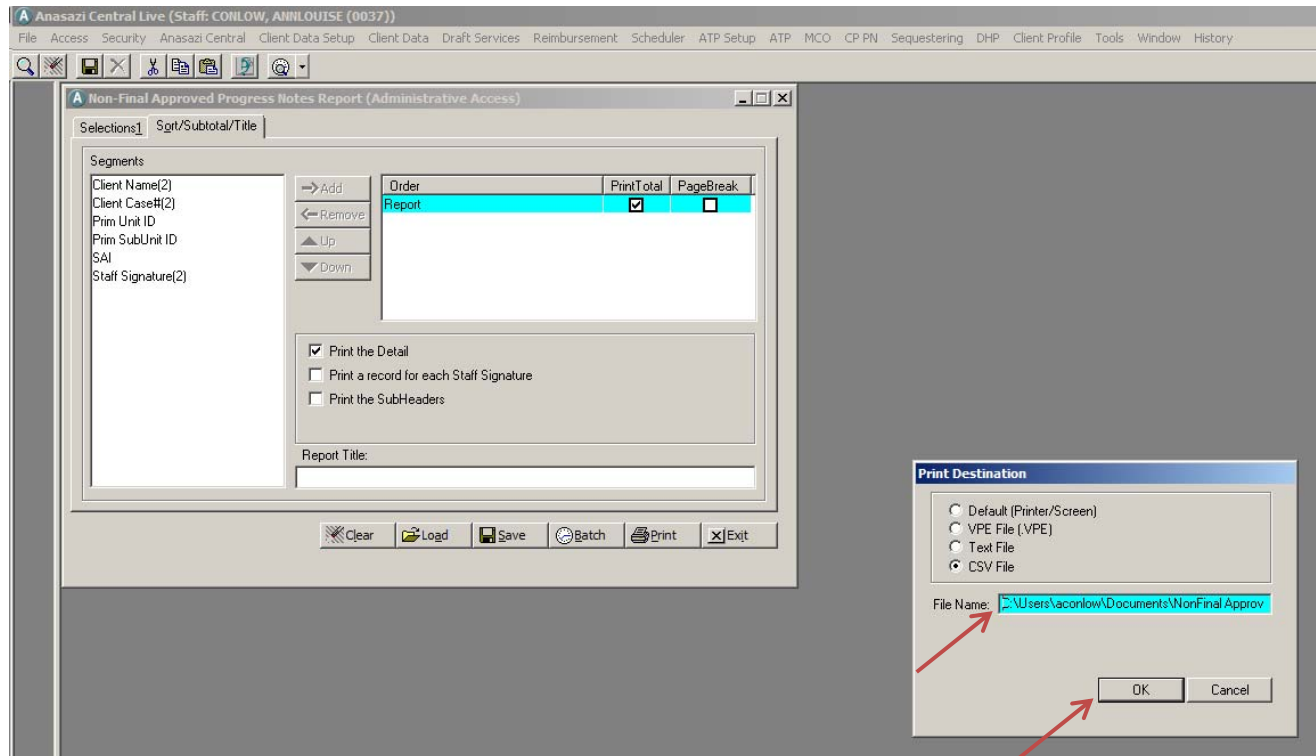
Enter the path to save the CSV file to the specified location on the computer.

Example:

For the path to the My Documents folder on the hard drive C:

Enter C:\Users\username\Documents\ReportTitle

Saving reports to a secure drive is required. See Program Policies for Saving Reports.



Select OK.

After the report is processed, it can be located in the drive to which it was saved. Please note the location that was entered in the Print Destination dialog window. The report will have a spreadsheet icon with the extension .csv following the document title. For example: ReportTitle.csv.

Program Policies for Saving Reports:

- Staff must immediately upon download move any report containing PHI to a secure drive
- Staff must delete any downloaded report containing PHI within 14 calendar days
- Staff may not create additional copies of a report containing PHI
- Procedures shall be in place for monitoring staff adherence to program policies