"How to Run Reports from SSRS and Save as Excel File"

- <u>Note</u>: Proper menu access to SSRS is required to display this link. If this link is absent, please contact the SUD Support Desk for assistance.
- 1- Click on the SSRS link in the upper right-hand corner of the SanWITS window.



2- On Home Screen > click on the "Provider Reports" Folder.

SanWITS									8	\pm
★ Favorites	Browse					+ New ~	† Upload	🛾 Manage folder	∀ View ~	Search.
Home										
FOLDERS (9)										
E. FEI		Implementation Suppor	My Reports	Optum	Provider Reports	San Diego Cou and Alcohol	inty Drug	Wits SSR	S Models	
PAGINATED REPO	RTS (12)									

3- Click on any Folder you would like to go and select the report you want to run. For example, the TUOS Reports Folder.

★ Favorites Browse					+ New ∽ ↑ Upload	🛛 Manage folder 🛛 🍸 View 🛩 🛛 Sea
Provider Reports						
FOLDERS (36)						
Active Census Report	Alpha Project	Bethany's Files	CERRC - MHS	CRASH Agency Reports	DMC QA Reports	ECS CERRC
Family Health Center of San Diego	Freedom Ranch	Harmony WRC	HOM Reports	Mary's Folder	McAlister	MHS Agency Reports Folder
Mid-Coast RRC-MHS	North County Serenity House	Outcomes Reports for CYF and AOA	Pathfinders of San Dieg	PC1000 Reports	Phoenix House	SDYS Teen Options
Serial Inebriate Program (SIP)	SUD Encounter Report	Teen Recovery-North inland	The Fellowship Center	The Turning Point Hom	TUOS Reports	• UCSD
UPAC	Vista Hill Bridges North Central RRC	Vista Hill Bridges TRC	···· Vista Hill ParentCare	Volunteers of America	U vvsd	·
PAGINATED REPORTS (1)						
Non-Billable Encounter Status Report						

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4- Once you click on the selected Folder, you'll see the available reports. For this example, we'll use the TUOS Claim Summary Report

★ Favorites 🚺 Browse					+ New ~	↑ Upload	🗌 Manage folder	Ƴ View ∽	Search
TUOS Reports									
Home > Provider Reports > TUOS	Reports								
PAGINATED REPORTS (5)									
Encounter Report For 10 *** Mins Duration Based Services	Encounter Report For 15 *** Mins Duration Based Services	Encounter Report For Unit Based Services	TUOS Claim Details Repo	TUOS Claim Summary Report					

5- Wait for the screen to load and a prompt bar will display. Once you type in the parameters you need, click "View Report" and wait for report to load (may take a few minutes). In this TUOS Claims Report example, you will be able to select Claims Service Dates, Payor, Facility, Service, Perinatal and Modality for your parameters.

Home > Provider Reports > TUOS Repo	rts > TUOS Claim Summar	ry Report								
Service Start Date From: 5/1/2019	E Servi	ice Start Date To: 5/31/2019		Service Group O	DDS,Case Management IDS,Ca M					
Payor DMC Billable,County Bil	Payor DMC Bilable,County Bilable,Lustice Ov F Facility M Modality Aftercare,Nonresidential/Outpatient Dt A									
Perinatal Yes/No										
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TUOS Claim Summary Report										
Facility	Modality	Payor	Perinatal Indicator	Service	Total Billing Unit Count					
Main Facility	ODS OS	DMC Billable	No	Case Management IOS	4.67					
				Total	4.67					
		Total			4.67					
	Total				4.67					
Total					4.67					

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6- After Report fully loads, click on Save icon from the dropdown on the Menu bar.

Home > Provider Reports > TUOS Reports > TUOS Claim Summary Report

Service Start Date Fron	0		Service Start Date To: 5/31/2019			DDS,Case Management IDS,Ca	View Rep
iyor irinatal Yes/No?	DMC Billable,County B	illable,Justice Ov	Facility Main Facility	V.	Modality After	Nonresidential/Outpatient Dz 💌	
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TUOS Claim	Summary Report						
	Summary Report	t Modality	Payor	Perinatal Indicator	Service	Total Billing Unit Count	
Fa			Payor DMC Billable		Service Case Management IOS		
Fa		Modality		Indicator		Unit Count	
Fa		Modality		Indicator	Case Management IOS	Unit Count 4.67	
		Modality	DMC Billable	Indicator	Case Management IOS	Unit Count 4.67 4.67	

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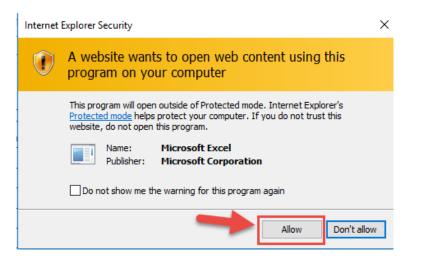
7- Select save file in Excel format.

Home > Provider	r Reports > TUOS Repo	orts > TUOS Claim Sun	nmary Rep	ort				
Service Start Date Fro	am: 5/1/2019		Service Star	Date To: 5/31/2019		Service Group	DDS,Case Management IOS,Ca	
Payor	DMC Billable,County B	illable,lustice Ov	Facility	Main Facility		M Modality Afterca	Nonresidential/Outpatient Da	
Perinatal Yes/No?	Yes,No	×						
⊲ < 1] of 1 > > () © 100%	~	<u>a</u> √ ⊕ [1	Find Next		
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TUOS Claim	Summary Report	t		Word				
F	Facility	Modality		Excel	Perinatal Indicator	Service	Total Billing Unit Count	
Main Facility		ODS OS	DMC 6	Excel	0	Case Management IOS	4.67	
			-			Total	4.67	
			Total	PowerPoint	<u>.</u>	-	4.67	
T-4-1		Total	_	PDF	-		4.67	
Total				garan Tanan	-		4.67	
				TIFF file				
		57	30/2019 6:48	MHTML (web archive)				
				CSV (comma delimited)				
				XML file with report dat				

8- You're going to receive a message window asking: "Do you want to open or save "Report" from reports.witsweb.org?" Click Open.

Do you want to open or save TUOS Claim Summary Report.xlsx from reports.witsweb.org?		Open	Save 🔻 Cancel	×
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9- After clicking Open, you're going to receive a Warning message saying: "A website wants to open web content using this program on your computer." Click Allow.



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10- Open downloaded report in Excel format.

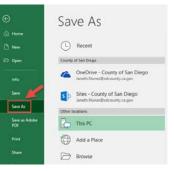
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2 3	Main Facility	ODS	OS	DMC Billa	ble		No	Case Management IOS	4.67
4								Total	4.67
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11- Click on File in the Menu Bar.

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1 2 3 4 5	TUOS Claim Summar Facility		Modality		Payor		Perinatal Indicator	Case Managem	Service	Total B
1 2 3 4	TUOS Claim Summar Facility		Modality	DMC Bil	Payor		Perinatal Indicator	Case Managem	Service	Total B

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12- Choose "Save As."



13- Browse and choose a location to save file.

X Save As										×
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X Microsoft Excel	^	Name			Date modified	Туре	Size			
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This PC		OneNote Notebooks			6/28/2018 5:37 PM	File folder				
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Pictures										
🚪 Videos										
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