



COUNTY OF SANTA CLARA  
**Behavioral Health Services**

**BHSD 2519 REFERRAL FILE EXTRACT (PCNX)**

07/05/23

# REVISIONS

Date	Slides	Revisions

## REFERRAL FILE EXTRACT (PCNX)

This report provides details of a SUTS client's referral from the Call Center.

Please Note: This report is only for SUTS clients, not MH.

# REFERRAL FILE EXTRACT

To look up a client's referral information, search and select **BHSD 2519 Referral File Extract (PCNX)**

Welcome, Stephannie Tran  
Every Day Matters

Referral File Extract (PCNX)

Advanced Client Search

Here is what I found:

All 1 Clients 0 Staff 0 Forms 1

Forms

Undock	Name	Menu Option
	BHSD 2519 Referral File Extract (PCNX)	/ Avatar MSO / CSC Reports

Enter and select own agency in **Contracting Provider** field and type in the initial date range of the referrals. Select **Process** to obtain the report.

**BHSD 2519 REFERRAL FILE EXTRACT (PCNX)** Process Discard Add to Favorites

BHSD 2519 Referral File Extract (PCNX)

**Contracting Provider \***  
Gardner - SUTS (10005) Q

**Initial Request - Start \***  
01/01/2023 Calendar T Y ↕

**Initial Request - End \***  
03/01/2023 Calendar T Y ↕

Once the report pops up, select **Export** to view the full report.

The screenshot shows a software interface for a report. At the top left, there are two buttons: 'Print Report' and 'Export'. The 'Export' button is highlighted with a blue border. Below the buttons is a search bar with the text 'Find...' and a magnifying glass icon. To the right of the search bar are icons for a folder, a document, and a printer, followed by a dropdown menu showing '1 of 1+' and a zoom level of '100%'. Below the search bar is a tab labeled 'Main Report'. The main area of the interface is a table with the following columns: PATID, last\_name, first\_name, c\_date\_of\_birthpatient\_ssn, patient\_gender\_value, c\_race\_value, c\_ethnicity\_value, and primary\_language\_value. The table contains seven rows of data.

<u>PATID</u>	<u>last_name</u>	<u>first_name</u>	<u>c_date_of_birthpatient_ssn</u>	<u>patient_gender_value</u>	<u>c_race_value</u>	<u>c_ethnicity_value</u>	<u>primary_language_value</u>
			04/18/1938	Male	Other	Mexican	English
			04/11/1964	Male	No Entry	No Entry	No Entry
			01/11/1957	Female	Pacific Islander	Mexican	English
			09/01/1970	Male	No Entry	No Entry	English
			08/14/1967	Male	Other	Other Hispanic/Latino	English
			11/04/1988	Female	White, Caucasian	Not Hispanic or Latino	English
			05/28/1984	Male	Hispanic or	Mexican	Spanish

Select “Microsoft Excel Record (XLS)” in **Format** field (1) and select ‘OK’ (2) to export the report into Excel.

Print Report

Export

Format: Microsoft Excel Record (XLS) ▼

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#### Excel Format

- Typical: Data is exported with default options applied.
- Minimal: Data is exported with no formatting applied.
- Custom: Data is exported according to selected options.

#### Column Width

- Column width based on objects in the:
- Constant column width (in points):

Details ▼

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- Export object formatting
- Export images
- Use worksheet functions for summaries
- Maintain relative object position

- Maintain column alignment
- Export page header and page footer
- Simplify page headers
- Show group outlines

Ok

2

Cancel

## MH PROVIDERS

Logging in with a MH System Code will allow access to the form, but no data will show on the report. This report must be accessed by a SUTS System Code.

BHSD 2519 REFERRAL FILE EXTRACT (PCNX) Process Discard Add to Favorites

BHSD 2519 Referral File Extract (PCNX)

**Contracting Provider \***  
Gardner - MH (30500)

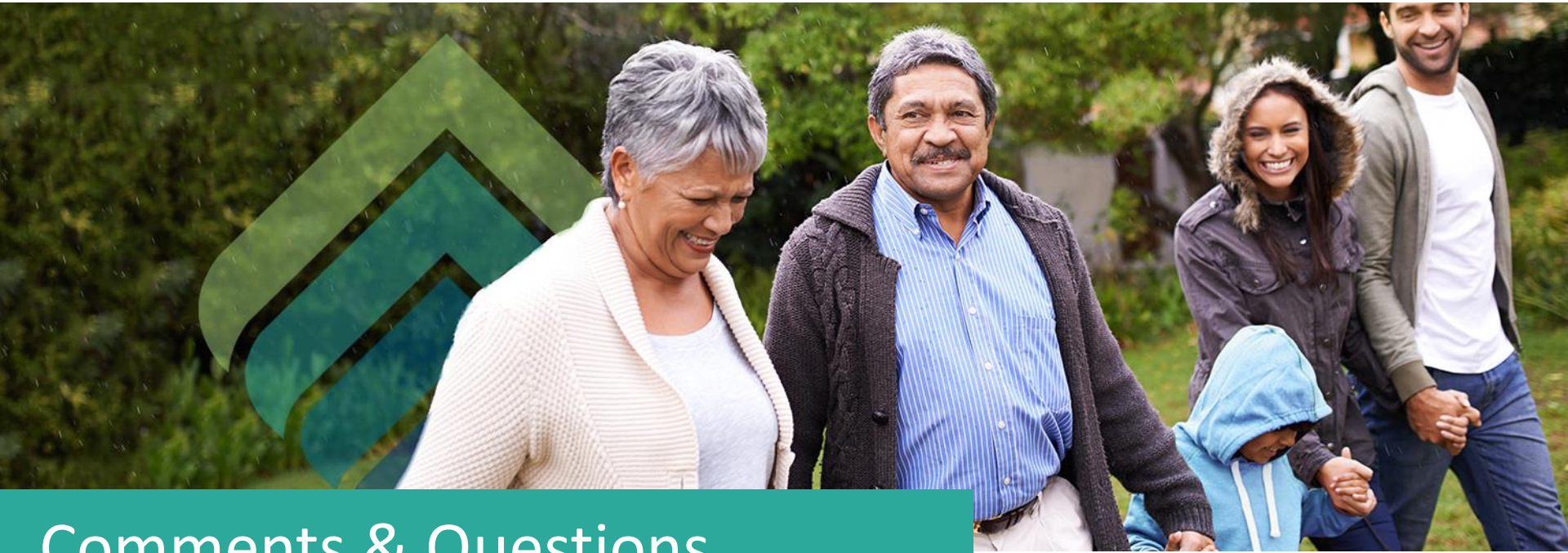
**Initial Request - Start \***  
06/01/2023

**Initial Request - End \***  
07/05/2023

**Only Referrals to A SUTS Provider Are Shown in the Report**

PATID    last\_name    first\_name    c\_date\_of\_birthpatient\_ssn    patient\_gender\_value





# Comments & Questions