From PCC To Spreadsheets

1. Partner

Many reports in Partner can be exported in a format that can be read by spreadsheet software such as LibreOffice Calc or Microsoft Excel. However, the report you create resides on your PCC server, and needs to be copied to your local workstation before you can open it as a spreadsheet.

Reports that can be exported to Excel format:

- Insurance Aging Report (**insaging**)
- Accounts Receivable Aging Report (**aging**)
- Insurance Activity Report (**activity**)
- Appointment Book Summary (**appts**)
- Smart Report Suite (**srs**)
- SNOMED Mapping Reports (**snomedmap**)
- Immunization CVX Configuration Report (**cvxreport**)

From the "Destination Selection" screen, there are two main options for transferring the Excel file from your PCC server to the workstation:

1) **Save to Workstation:** This should work on most Windows-based workstations when using AniTa or TeraTerm.
2) **E-Mail:** This should work for all operating systems.

Send the report to your PCC email address (this keeps all the data on your PCC server). This email address takes the form of:

username@acro.pcc.com

… where "username" is the user name that you use to log into Partner, and "acro" is the unique acronym assigned by PCC for your practice. If you're not sure what "username" or "acro" to use, please contact PCC support.

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To access this email, go to the web-based email application hosted on your PCC server using any web browser:

https://acro.pcc.com/webmail

...where "acro" is the unique acronym assigned by PCC for your practice. Log in with your Partner name/password.

Clicking on the email attachment in the web based email application should open the file in your spreadsheet application.

2. PCC EHR

Many clinical reports in PCC EHR can be saved in a Comma Separated Value (CSV) file format, which can be readily imported into a spreadsheet application. If the PCC EHR application is running on the workstation, the CSV report can be saved directly to your workstation without additional file transfer work.

Reports that can be saved as CSV format:
- Patient List
- Patient Reminders
- PCC EHR Audit Log
- Lab Test Report
- Vaccine Lot Report
- Phone Encounter Performance
- Report Library (all reports contained therein)

Once the report has been generated, the file can be saved to CSV by clicking a button called "Save as File" or "Save As CSV" within PCC EHR. From the file save window, select a directory and enter a file name for the CSV file.

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Opening CSV files with LibreOffice Calc:

To import the CSV file into LibreOffice Calc, go to the directory you selected previously in the save window. Double-click the file name, or right click to select "Open with", followed by "LibreOffice Calc".

From the CSV import wizard, be sure that the delimiter/separator is set as a "comma", and the text delimiter is a double quote ("). Select the "Quoted field as text" option. All other delimiter/separator options besides "comma" should be unset/deselected. Most other options can be ignored.
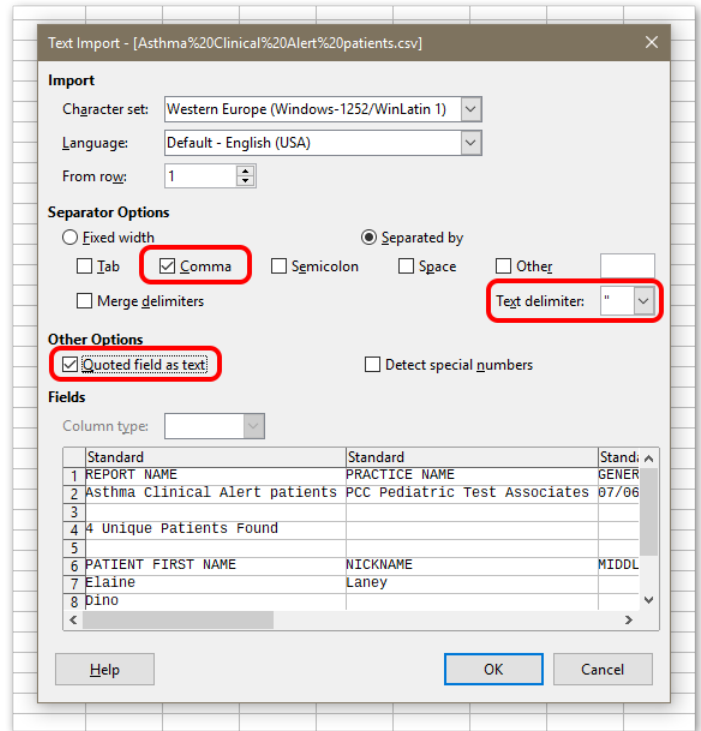
Opening CSV files with MS Excel:

To import the CSV file into MS Excel, go to the directory you selected previously in the save window. Double-click the file name, or right click to select "Open with", followed by "Excel". The CSV file should be automatically imported.

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3. PCC Dashboard

Many Dashboard trends and lists can be saved to a Comma Separated Value (CSV) file format, which can be readily imported into a spreadsheet application. Because the browser you use to access the Dashboard is usually running on your workstation, the CSV report can be saved directly to your workstation without additional file transfer work.

Reports that can be saved as CSV format include:
- Most trend graph data
- Various overdue patient lists (HPV, Immunization – Influenza, etc...)

When you save the CSV file it will usually be in your Downloads folder. Opening the CSV file in a spreadsheet can be performed as described in the previous PCC EHR section.

Tip: Many tables in the dashboard can also be exported using the cut/paste feature of your browser. Click and drag to highlight the entire table in your browser, select "copy" from within the browser, navigate to an empty spreadsheet, and then click "paste".

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