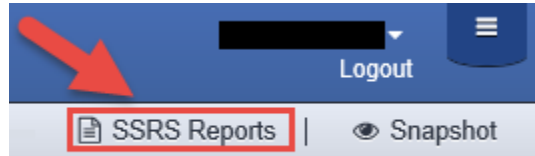


# SanWITS SSRS Tip Sheet

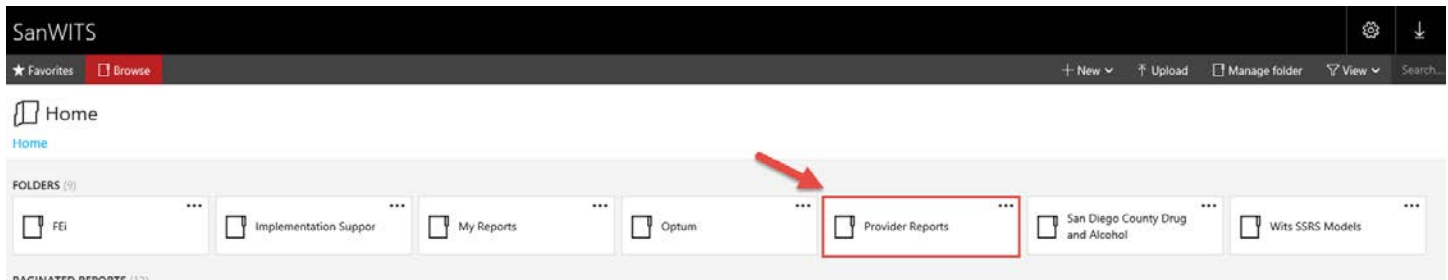
## “How to Run Reports from SSRS and Save as Excel File”

- **Note:** Proper menu access to SSRS is required to display this link. If this link is absent, please contact the SUD Support Desk for assistance.

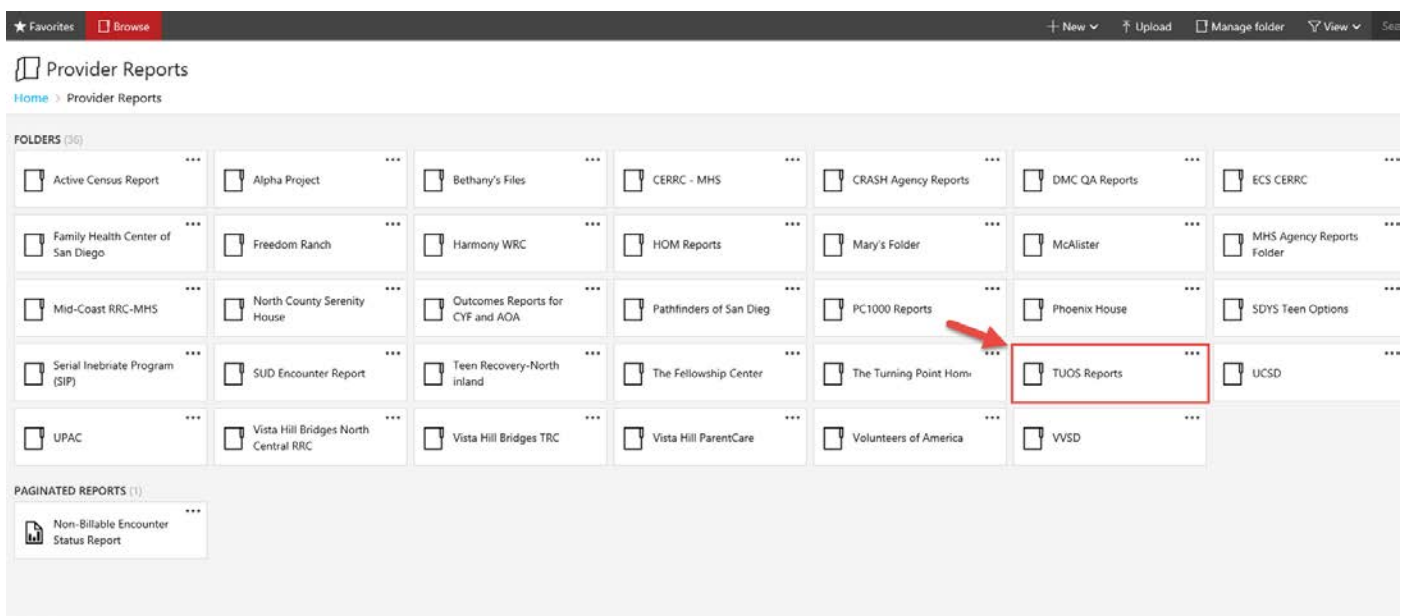
1- Click on the SSRS link in the upper right-hand corner of the SanWITS window.



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



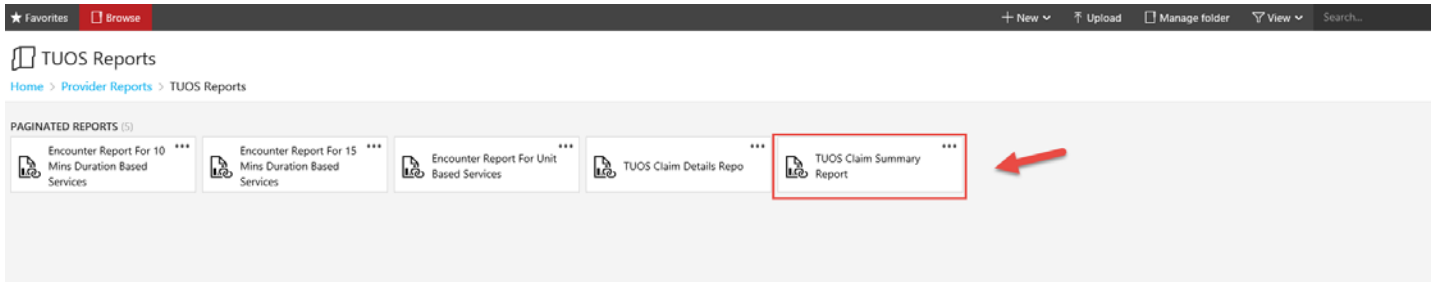
3- Click on any Folder you would like to go and select the report you want to run. For example, the TUOS Reports Folder.



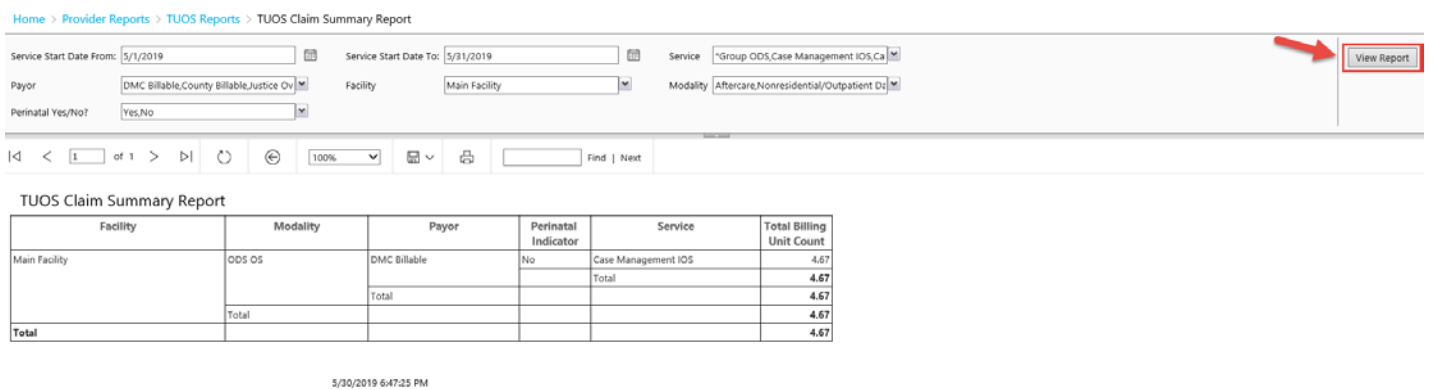
# SanWITS SSRS Tip Sheet

## “How to Run Reports from SSRS and Save as Excel File”

- 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



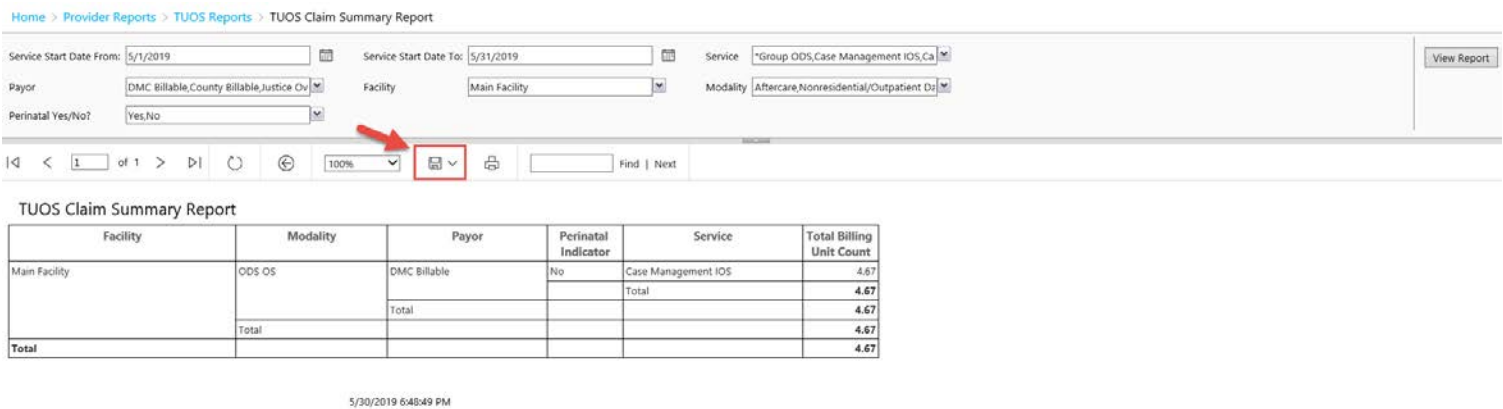
- 5- Wait for the screen to load and a prompt bar will display. Once you type in the parameters you need, click “View Report” and wait for report to load (may take a few minutes). In this TUOS Claims Report example, you will be able to select Claims Service Dates, Payor, Facility, Service, Perinatal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



5/30/2019 6:47:25 PM

Facility	Modality	Payor	Perinatal Indicator	Service	Total Billing Unit Count
Main Facility	ODS OS	DMC Billable	No	Case Management IOS	4.67
		Total		Total	4.67
		Total			4.67
Total					4.67

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



5/30/2019 6:48:49 PM

Facility	Modality	Payor	Perinatal Indicator	Service	Total Billing Unit Count
Main Facility	ODS OS	DMC Billable	No	Case Management IOS	4.67
		Total		Total	4.67
		Total			4.67
Total					4.67

# SanWITS SSRS Tip Sheet

## “How to Run Reports from SSRS and Save as Excel File”

- 7- Select save file in Excel format.

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

Service Start Date From: 5/1/2019 Service Start Date To: 5/31/2019 Service: \*Group ODS Case Management IOS, Ca  
Payor: DMC Billable, County Billable, Justice Ov Facility: Main Facility Modality: Aftercare, Nonresidential/Outpatient D  
Perinatal Yes/No? Yes, No

100% Find | Next

TUOS Claim Summary Report

Facility	Modality	Perinatal Indicator	Service	Total Billing Unit Count
Main Facility	ODS OS	DMC E	Case Management IOS	4.67
		Total	Total	4.67
Total				4.67

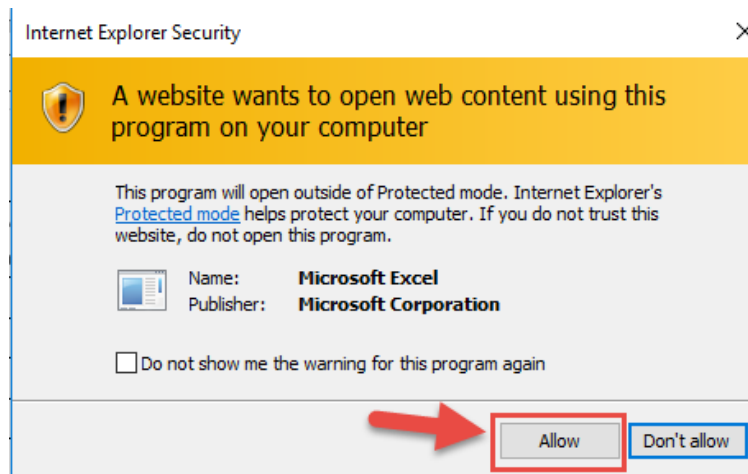
5/30/2019 6:48

Word  
Excel  
PowerPoint  
PDF  
TIFF file  
MHTML (web archive)  
CSV (comma delimited)  
XML file with report data  
Data Feed

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



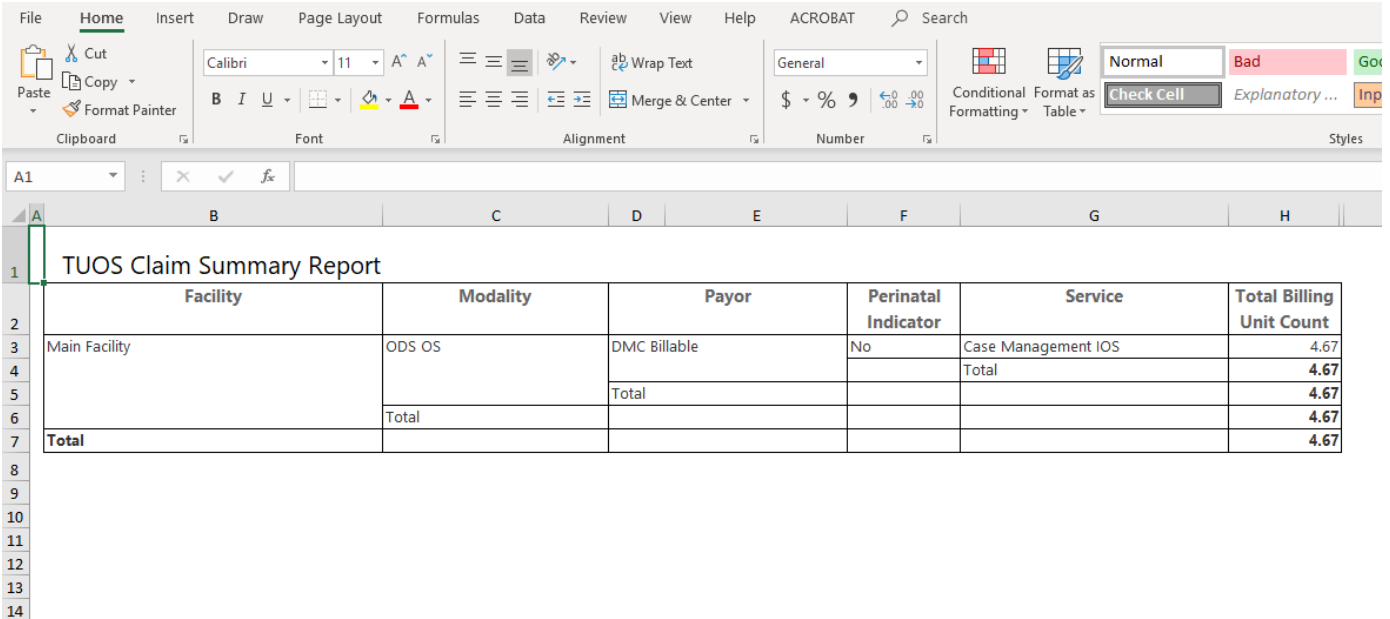
- 9- After clicking Open, you're going to receive a Warning message saying: "A website wants to open web content using this program on your computer." Click Allow.



# SanWITS SSRS Tip Sheet

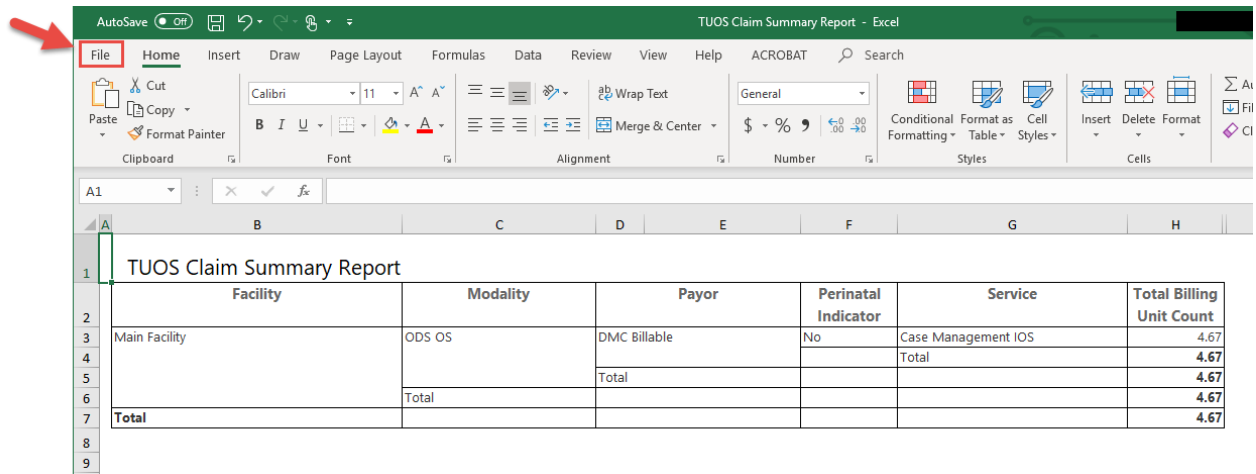
## “How to Run Reports from SSRS and Save as Excel File”

10- Open downloaded report in Excel format.



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
<b>Total</b>					<b>4.67</b>

11- Click on File in the Menu Bar.

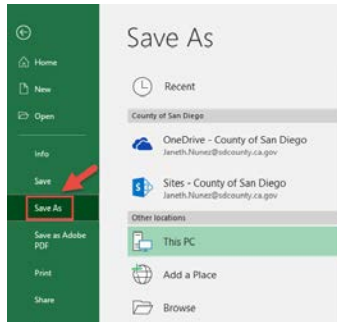


Facility	Modality	Payor	Perinatal Indicator	Service	Total Billing Unit Count
Main Facility	ODS OS	DMC Billable	No	Case Management IOS	4.67
				Total	4.67
	Total				4.67
<b>Total</b>					<b>4.67</b>

# SanWITS SSRS Tip Sheet

## “How to Run Reports from SSRS and Save as Excel File”

12- Choose “Save As.”



13- Browse and choose a location to save file.

