FEBRUARY 17, 2025

EXPORTING TO A CSV (EXCEL) FILE CENTRAL INTAKE



Exporting Patient Referral Management Lists to a CSV File

You may need to export the list of referrals to a CSV (comma separated file) file for use withing Microsoft Excel. Follow these steps to export the list of referrals.

1. From any of the Referral Management Lists (e.g., W1 – Specialist triage – All Referrals), click the Export button located in the bottom right corner of the screen (Step #1).

Central Intake - Referral Management										Downloads C Q S					
- Special ilters Statu Triage Consi	list triage - All us: Assigned for Spec ult Zone × ~	I referrals (Pool salist Prioritization Problem(s) × ~	Priority	c) Refe	Referral Count (Current Filter): 16						e-0000847.0250213-172442.pdf Cont.life e-0000847.0250213-172442.pdf Cont.life coptina Specialist Appt Scheduling 13-Feb-2025.zip Cont.life See more				
Referral Id 👔	Referral Type 👔	Patient Name / 1 HCN	Submitted 1	PCP/Referring Physician	Patient Home Zone	Book With Specialist	Problem(s)	Functional Impact	Priority	Triage Consult Zone	1 Triage Consult Specialist	Status 1	Status Date	Wait Time	Details
ci-0000698	Ophthalmology Legacy	COAT, LISA (•)	13-Mar-2023		Labrador- Grenfell		Glaucoma			Labrador- Grenfell	specialist_one, ophtha_lg, Dr.	Assigned for Specialist Prioritization	12-Feb- 2025	707	
<u>ci-0000970</u>	Ophthalmology Legacy	TEST, TESTZ (•)	13-Mar-2023		Eastern Urban		Cataract		P2	Eastern Urban	Bramwell, Lori, Dr	Assigned for Specialist Prioritization	30-Jan- 2025	707	۵
<u>ci-0000745</u>	Ophthalmology Legacy	TEST HANN, KENT (-)	14-Mar-2023		Eastern Urban		Cornea Cataract			Eastern Urban	Eastern Urban, Specialist, Dr.	Assigned for Specialist Prioritization	31-Jan- 2025	706	۵
<u>ci-0000837</u>	Ophthalmology Legacy	LARSON_CONFCI, LELA (139652587540)	14-Mar-2023		Eastern Urban		Cornea Cataract			Eastern Urban	Eastern Urban, Specialist, Dr.	Assigned for Specialist Prioritization	12-Feb- 2025	706	
<u>ci-0000402</u>	Ophthalmology Legacy	LEBLANC, EURA_TPCHI (679581949675)	16-Mar-2023		Western		Uveitis			Western	Campos-Moller, Xavier, Dr	Assigned for Specialist Prioritization	09-Jan- 2025	704	۵
ci-0000318	Ophthalmology	test, test (·)	09-Dec-2024	eu-pr-clinc-pcp.mh	Eastern Urban	Dang, Dr	Retina Glaucoma Cornea Cataract Other	Yes		Eastern Urban	Eastern Urban, Specialist, Dr.	Assigned for Specialist Prioritization	03-Feb- 2025	70	۵
ci-0000388	Ophthalmology	BERG, ALLAN_TPCHI (149532371395)	20-Dec-2024	Cadet, Kelli, Dr	Eastern Urban	Dang, Harry, Dr	Cornea	No		Eastern Urban	Next Available	Assigned for Specialist	12-Feb- 2025	0	

- 2. The **exported CSV file** will be placed in your **Downloads** folder. The export **includes up to 400 rows of data** from the current filtered and sorted Referral Management List, including all columns displayed on the screen.
 - a. If the current Referral Management List includes more that 400 referrals, only the first 400 will be included in the extract, CSV file.
- 3. When the file is opened in MS Excel, the HCN identifier column may appear like an exponent. This is default behaviour in Excel. You can adjust the display by changing the format.



- a. Select (highlight) the **HCN** Identifier column in Excel. (Step 1)
- b. Right-mouse click to open a pop-up menu; select
 Format Cells.... (Step 2)
- c. Choose **Number** from the **Category** list. Adjust the

ed PCP/Refer Pat X Cut Copy 1/H Paste Opti BBB 1.396 ÷ Use 1000 S Delete 2.397 Clear Content Guick Ana 8.39 Filter CULA Get Data from Ta C New Com New Note E Eormat Cells Pick From Dr

d. Click **OK**. (Step 4)

Decimal places value to 0. (Step 3)



4. The **HCN Identifier** numbers is now displayed correctly within Excel.

5	~ v	~	U			U			,	N	L	191	11	U		ų
	Referral Id Referral Ty F	irst Name	Last Name	Identifier / HCN	Submitted	PCP/Refer	Patient Ho	Book With	Problem(s	Functional	Priority	Triage Cor	Triage Con	Status	Status Date V	Vait Time
	ci-000069l Ophthalmc Ll	ISA	COAT		*******		Labrador-	Grenfell	[Glaucoma]		Labrador-	specialist_	Assigned for	########	707
	ci-000097(OphthalmcTl	ESTZ	TEST		******		Eastern Ur	ban	[Cataract]		P2	Eastern U	Bramwell,	Assigned for	30-Jan-25	707
	ci-000074! Ophthalmc K	ENT	TEST HAN	N	*******		Eastern Ur	ban	[Cornea, C	ataract]		Eastern U	Eastern Ur	Assigned for	31-Jan-25	706
	ci-000083 Ophthalmc Ll	ELA	LARSON_C	139652587540	******		Eastern Ur	ban	[Cornea, C	ataract]		Eastern U	Eastern Ur	Assigned for	########	706
	ci-000040: Ophthalmc E	URA_TPC	LEBLANC	679581949675	########		Western		[Uveitis]			Western	Campos-M	Assigned for	09-Jan-25	704
	ci-0000311 Ophthalmc te	est	test		*******	eu-pr-clind	Eastern Ur	Dang, Dr	[Retina, Gl	Yes		Eastern U	Eastern Ur	Assigned for	########	70
	ci-000038l Ophthalmc A	LLAN_TP	BERG	149532371395	******	Cadet, Kell	Eastern Ur	Dang, Harr	[Cornea]	No		Eastern U	Next Availa	Assigned for	########	59
	ci-000045(Ophthalmc K	IRK	FLORES	329550532389	09-Jan-25	Cadet, Kell	Western	Next Availa	[Cornea]	No		Western	Next Availa	Assigned for	09-Jan-25	39
)	ci-000045: Ophthalmc M	ILTON_TE	MCCORM	529581714605	09-Jan-25	Cadet, Kell	Western	Next Availa	[Cornea]	No		Western	Next Availa	Assigned for	09-Jan-25	39
I	ci-000228l Ophthalmc TI	EST	ZTEST	239722011198	27-Jan-25		Eastern Ur	Next Availa	[Retina]	No		Eastern Ru	Next Availa	Assigned for	########	21
2	ci-000229: Ophthalmc D	AISY	SPEARS	799551749739	27-Jan-25	Fowler, Eri	Labrador-	Mdlankom	[Retina]	Yes		Labrador-	specialist_	Assigned for	27-Jan-25	21
3	ci-0002321 Ophthalmc E	DWARD	VAN HALE	839570010505	31-Jan-25	Brown-Ma	Eastern Ru	Next Availa	[Cataract]	No	P2	Eastern Ru	Next Availa	Assigned for	31-Jan-25	17
ļ	ci-000238: Ophthalmc E	DWARD	VAN HALE	839570010505	******		Eastern Ur	ban	[Retina]			Eastern Ru	Next Availa	Assigned for	########	5
;	ci-000239! Ophthalmc H	IAM	BURGER		******	eu-pr-cline	Eastern Ru	specialist_	[Glaucoma	No		Eastern Ru	specialist	Assigned for	########	4
;	ci-000239(Ophthalmc C	OUNT	DRACULA		******	eu-pr-cline	Eastern Ru	Bramwell,	[Retina]	Yes		Eastern Ru	Bramwell,	Assigned for	########	4
7	ci-000239! Ophthalmc C	OUNT	DRACULA		*******		Eastern Ru	Iral	[Other]			Eastern Ru	er-pr-clind	Assigned for	########	4
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