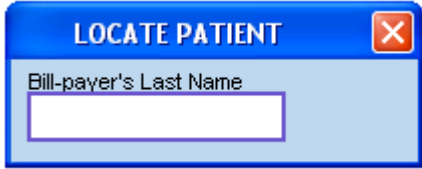# TheraManager Help Note

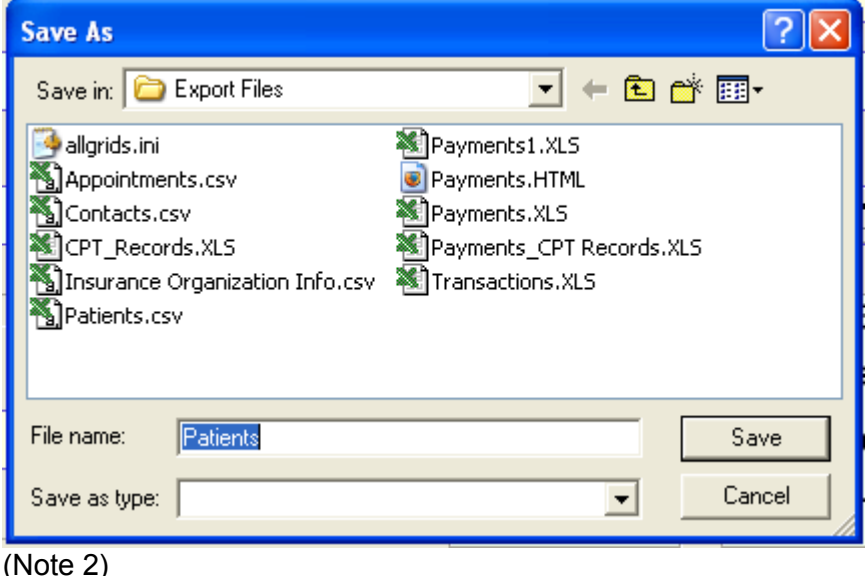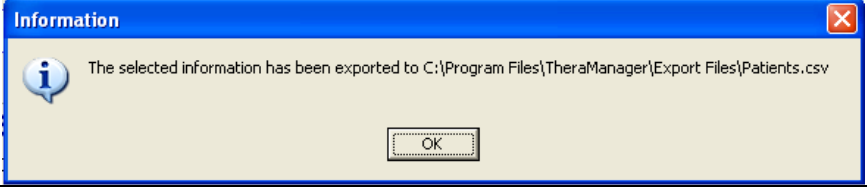**Subject: Viewing and Exporting a List of Patients Having the Same Billpayer**

This Help Note describes how to view demographic data of patients having the same billpayer, and export this data to a comma separated variable (*.csv) file. This file can be opened by another application (e.g., Microsoft Excel, Avery Wizard) for mail-mergers, list generation etc.

This is helpful if you wish to identify patients for whom you are billing a county agency, school district, attorney etc. Note that you do not need to generate this list for billing; this is simply for identification purposes.

	Screen
Start at ▶	Any of the following: • **Appointments** • **Patients** • **Insurance** • **Lab Tests** • **Dx/Problems** • **Rx/eRx** • **Documents** • **EMR** (Note 1)

Task	Screen Response
From the system menu, select **Search > Find Patients by > Bill Payer Last Name**	appears
Enter the desired billpayer name	List of patients appears in titlebox

TheraManager Help Note

Select **Actions > Export Mail-merge/.csv Files > By Titlebox > All**	 **Save As** Save in: 📁 Export Files 🔧 allgrids.ini 📊 Payments1.XLS 📊 Appointments.csv 🌐 Payments.HTML 📊 Contacts.csv 📊 Payments.XLS 📊 CPT_Records.XLS 📊 Payments_CPT Records.XLS 📊 Insurance Organization Info.csv 📊 Transactions.XLS 📊 Patients.csv File name: Patients [Save] Save as type: [Cancel] (Note 2)
Select the location where the Patients.csv file will be saved, then click [Save]	**Information** ℹ The selected information has been exported to C:\Program Files\TheraManager\Export Files\Patients.csv [OK]
Click **OK**	Patients saved as a *.csv file (Note 3)

Notes

1. Actually, this function will work on any screen (except the **Administrator** and login screens). However, if you select **Actions > Export Mail-merge/.csv Files > By Titlebox** on a screen without the Patient, , titlebox visible, the patient list printed will be per the above ▪▫ setting on the last screen where the Patient, , titlebox was visible.

2. By default, the Patients file is exported to the .\TheraManager\Export Files folder of the client computer. The dialog appearing upon completion of the export will show the target folder.

3. The exported file consists of the following fields:

    a. Category (P for <u>P</u>atient)

    b. Patient number

    c. Last name

    d. First name

    e.   Middle name

    f.   (Full) Name

    g.   Address

    h.   Town

    i.   State

    j.   ZIP code

    k.   Home phone

    l.   Work phone

    m.   Work extension

    n.   Mobile phone

    o.   (Telephone number of) Pharmacy

    p.   (Name of) Co-provider

    q.   (Name of) Primary care provider

    r.   (Name of) School

    s.   Email (can be excluded by selecting **Without Emails** above)

    t.   DOB

    u.   Gender

4. It is strongly recommended that you rename Patients.csv (e.g., by date or by clinician) before saving the file – otherwise you will overwrite the previously saved file.

5. After saving this .csv file, you can open it using a spreadsheet or database program like Microsoft Excel in order to sort, edit as a basis for generating mailing labels, e-mails or automatic telephone messaging.

6. To reset the patient list in `Patient, ,`, logout of TheraManager, then login again.