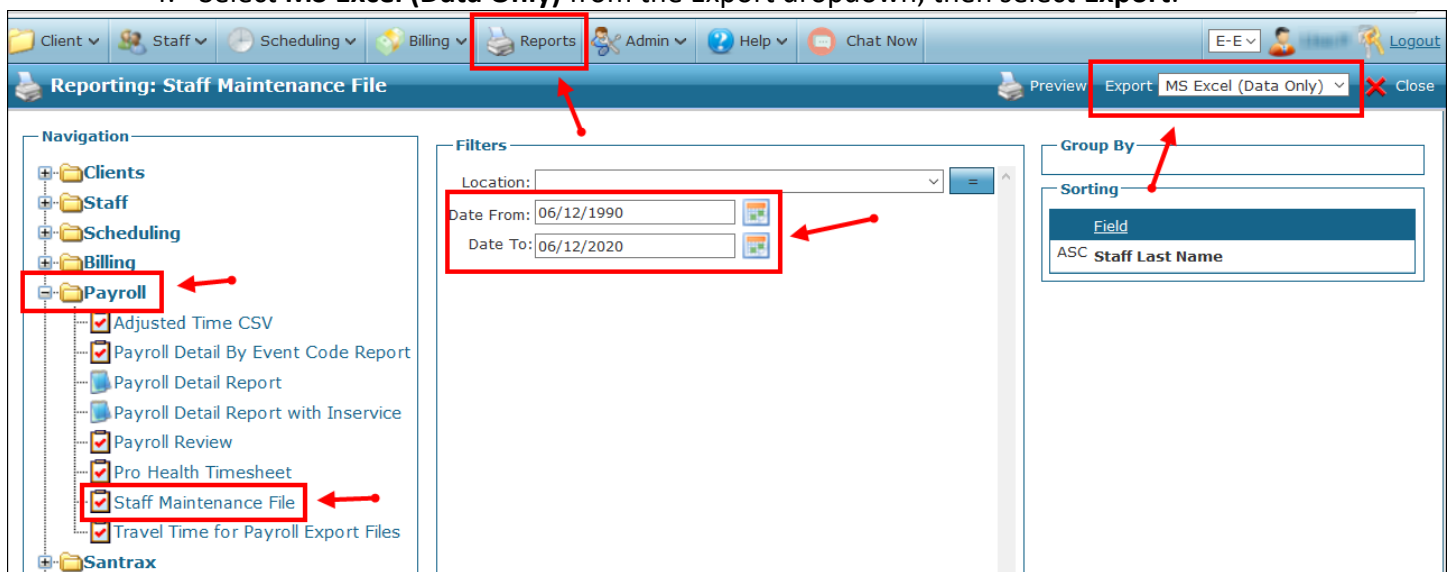


Using File Export to Obtain a List of Employees

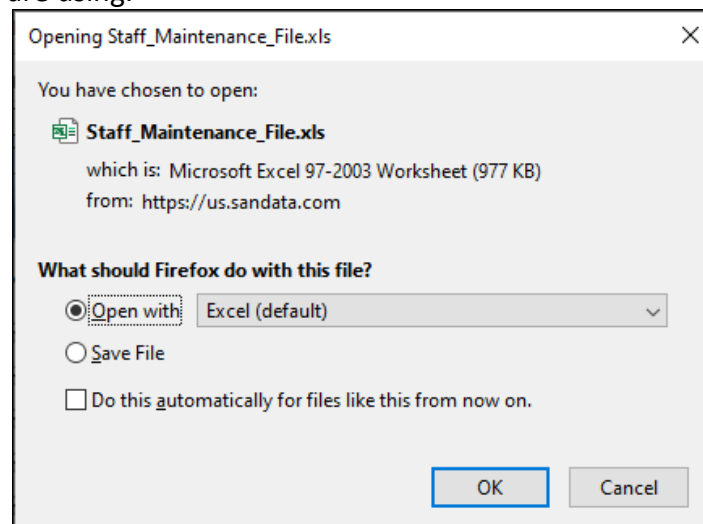
The Staff Maintenance File includes the staff's DOB, SSN and classification for staff that have a change to their profile within the date range selected. This can easily be used pull an extract of all staff within your database if a large date range is selected.

To access the Staff Maintenance File export, follow the steps listed below:

1. Log into Santrax Agency Management, and from the Main Menu, select **Reports**
2. Within the **Payroll** tab select **Staff Maintenance File**.
3. Select a large Date Range as this pulls staff profile information that has been edited during this time range.
4. Select **MS Excel (Data Only)** from the Export dropdown, then select **Export**.



5. If the following screen appears click on OK. The download method may vary depending on the browser you are using.

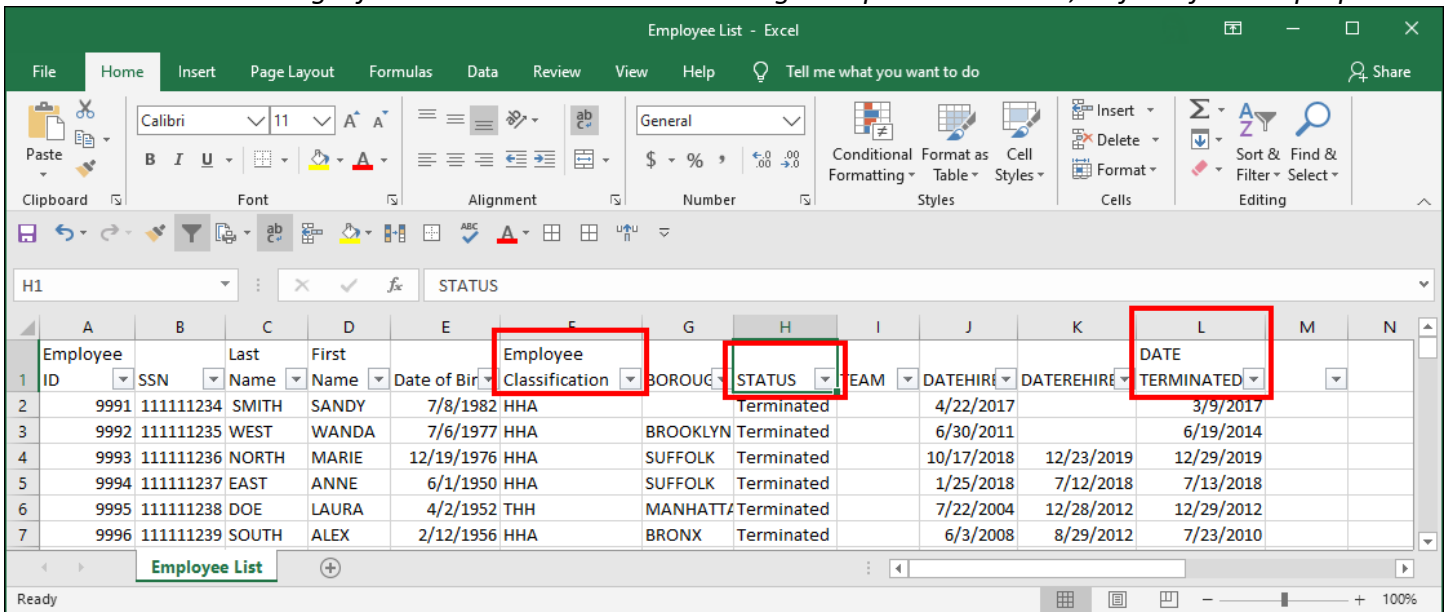


- The following spreadsheet will open. Highlight and delete columns A (Company Code) through B (File Number), G (Home Department) through N (Home Phone number), and columns N (Federal Marital Status) through Z (Branch ID)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Company Code	File Number	Employee ID	Employee Last Name	Employee First Name	Social Security Number	Home Department	Pay Status	Address Line 1	Address Line 2	City	Zip	Gender	Home Phone Number	Job Title	Hire Date	Birth Date	Termination Date	Federal Marital Status	Federal ID
2	123	EEMP12301	12345	Aaron	Aaron			A					M		OFC	12/12/2017				
3	123	EEMP12301	12346	Aaron	Ann	000-00-1234		A	123 Main Street		BRONX	10457			HHA	06/11/2014	02/13/1952		M	
4	123	EEMP12301	12347	Aaron	Andy			A							ALL	08/13/2018		12/29/2018		
5	123	EEMP12301	12348	Doe	Jane	000-00-1235		A	124 Main Street		BROOKL	11203		555556338	HHA	08/23/1983	04/13/1955	02/06/2018	M	
6	123	EEMP12301	12349	Doe	John	000-00-1235		A	125 Main Street		BRONX	10466		555556338	HHA	03/20/1993	12/23/1954		S	
7	123	EEMP12301	12350	Doe	Diana	000-00-1235		A	126 Main Street		BRONX	10472		555556338	HHA	11/30/2000	06/10/1972		S	
8	123	EEMP12301	12351	Smith	John	000-00-1235		A	127 Main Street		BRONX	10451		555556338	HHA	02/22/2017	06/30/1959	04/03/2018	S	
9	123	EEMP12301	12352	Smith	Sally	000-00-1235		A	128 Main Street		BRONX	10460		555556338	HHA	11/16/2016	11/27/1974		S	
10	123	EEMP12301	12353	Smith	Sam	000-00-1235		A	129 Main Street		BRONX	10459		555556338	HHA	10/29/2011	04/08/1968		S	

- The following columns should remain.
- Click on the Sort & Filter button. To delete employees who are not active, filter by Status or Date Terminated, and remove those who are not active, or those past your lookback period.
- This file can be separated by Employee Classification. Typically, Office staff, Nurses and Field Staff are reviewed separately in exclusion portals as they may be reviewed by different departments or different criteria may be used to clear matches.

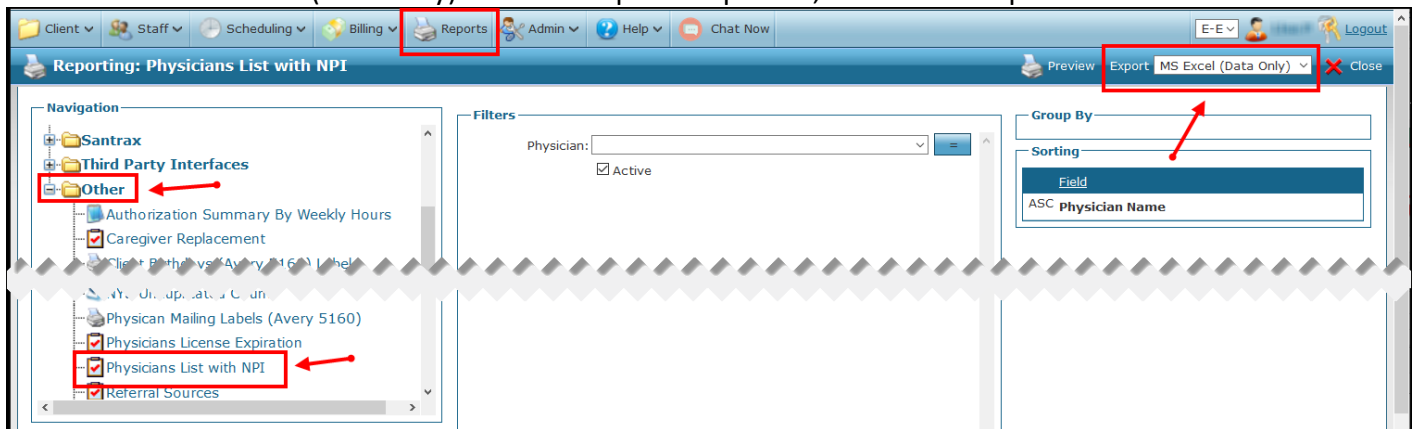
Note: Only the Employee Name, and Birth Date will be uploaded in the exclusion portal, the remaining information can be used to investigate a potential match, or for reference purposes.



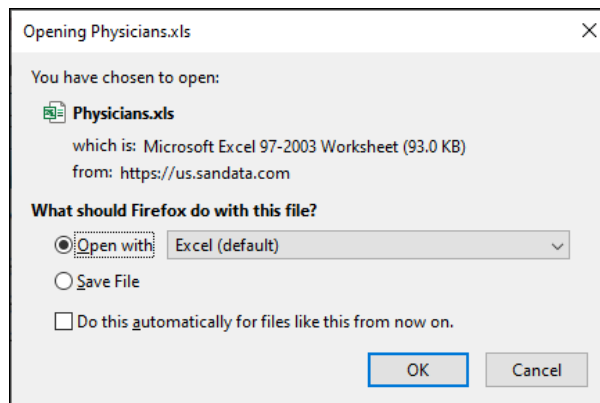
Employee ID	SSN	Last Name	First Name	Date of Birth	Employee Classification	BOROUC	STATUS	TEAM	DATEHIRE	DATEREHI	DATE	TERMINATED
9991	111111234	SMITH	SANDY	7/8/1982	HHA		Terminated		4/22/2017		3/9/2017	
9992	111111235	WEST	WANDA	7/6/1977	HHA	BROOKLYN	Terminated		6/30/2011		6/19/2014	
9993	111111236	NORTH	MARIE	12/19/1976	HHA	SUFFOLK	Terminated		10/17/2018	12/23/2019	12/29/2019	
9994	111111237	EAST	ANNE	6/1/1950	HHA	SUFFOLK	Terminated		1/25/2018	7/12/2018	7/13/2018	
9995	111111238	DOE	LAURA	4/2/1952	THH	MANHATT	Terminated		7/22/2004	12/28/2012	12/29/2012	
9996	111111239	SOUTH	ALEX	2/12/1956	HHA	BRONX	Terminated		6/3/2008	8/29/2012	7/23/2010	

Using File Export to Obtain a List of Physicians

1. From the **Reports** tab, select the **Physicians List with NPI** within the **Other** reports tab.
2. Select MS Excel (Data Only) from the Export dropdown, then select Export.



3. If the following screen appears click on OK. The download method may vary depending on the browser you are using.



4. The following spreadsheet will open.

Best Practice for exclusions uploads:

Remove commas, titles and initials from names. Complete this by highlighting column A, typing <Ctrl><F> to search and navigating to the Replace tab. Then enter what should be removed in the "Find what:" entry, and click on Replace All. Note: If DR is removed without a period (.) and an individual's name contains DR, that text will be removed. Dan Drey will become Dan ey.

	A	B	C	D	E	F	G	H	I	J	K
1	Physicians List with NPI	Active = True'									
2	Name	Address	City	Zip	NPI	Id1	License	License Exp.	Office #	Fax #	
3	Addler, Annie				101111105				(555) 555-1550		
4	Anderson, M.D. Andy	5 Main St			101111106		10711106		(555) 555-1551	(555) 555-4048	
5	Bing, Brad				101111107				(555) 555-1552		
6	Doe, Debby				101111108				(555) 555-1553		
7									(555) 555-1554		
8									(555) 555-1555	(555) 555-3685	
9									(555) 555-1556		
10							10111111		(555) 555-1557	(555) 555-4048	
11									(555) 555-1558		
12									(555) 555-1559		
13									(555) 555-1560		
14									(555) 555-1561	(555) 555-8633	
15									(555) 555-1562	(555) 555-6063	

Find and Replace	
Find what:	Dr.
Replace with:	
Options >>	
Replace All	Replace
Find All	Find Next
Close	