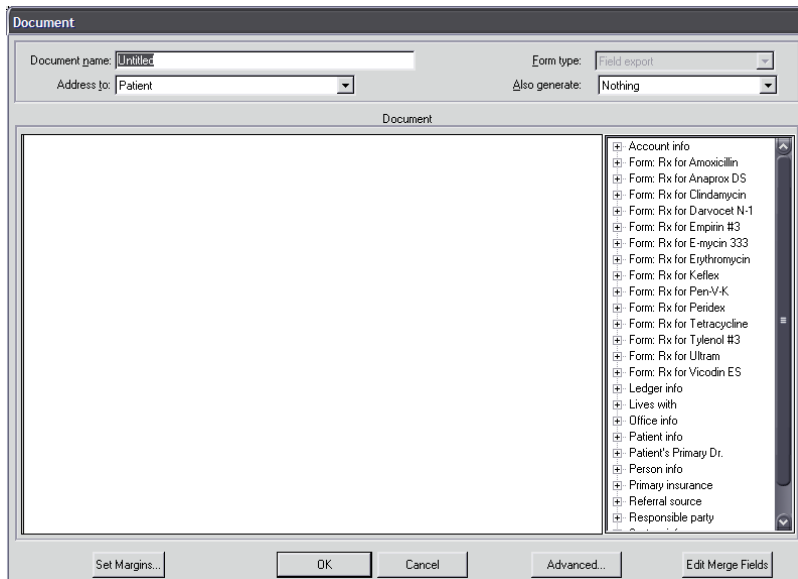


## Faxback Document # 1036

### Making a Field Export for Lives With

A Field Export can be used to export information out of Practiceworks into a text file or .CSV file to be used on other computers, or with other programs. The example below will show how this can be done from the Person Pick List.

1. The easiest way to create a Field Export is from the **Action** button on the Person Pick List.
2. To get to the Person Pick List click on **List\_People**
3. Right click the **Action** button for Define AutoLinks.
4. Select - **Add**.
5. Choose - **Create Document**.
6. Select - **Create a Specific Document**.
7. Select - **Add**.
8. Select – **Field Export** for the Document type, and the Document was to be based on Patient Data.
9. The New Document window will appear.

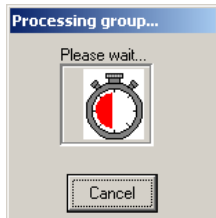


10. Click on the + in front of Patient Info on the right hand side; this will expand the variables that you can choose from.

10. By double clicking any one of these variables, it will put them in the document. For this example we are going to choose Patient first name, last name, and the address.
11. Before exiting the document screen we need to name the document.
12. Click on the **OK** button on the bottom to exit out of the New Document window.
13. Your new document should now appear on the document pick list.... click **OK**
14. Click on **OK** again on the Create Document Response window.
15. Select **Always Print Later** in the Select Print Time window.
16. Select **Yes, ask each time I really want this response** in the Define New AutoLink-Step 1 window.
17. This will bring up the AutoLink for PersonPickListActionBtn button event window, click on the **Select** button in the Response criteria field.

18. Put a check in the box next to **Who is a lives with** and then click on **OK**.
19. Click on **OK** again to close out of the AutoLink for PersonPickListActionBtn button event window.
20. Click on **OK** to close out of the Current AutoLinks for PersonPickListActionBtn button event window.

- 21 You should now be back at the Person Pick List window, this time left click on the Actions button and select “ All Displayed Records “.
- 22 This will bring up the Actions to take window, select the document that you just created by putting an “X” in the box next to it, and select ok.
- 23 The processing group window will appear (this could take some time depending on the number of patients you have).



- 24 After the processing group window disappears go to File\_Print\_Document Queue. Look for the document that you just created under the “Document Name” field. Make sure that you have “All documents named” selected under the Selection section. Highlight any one of those documents and select “Print or Export Selection”. You will be asked to confirm if you want to print all documents, select yes.
- 25 This will bring up the “Save As” window; give the document a name under the File name dropdown and save it to your desktop by clicking on the Save button. (**TIP:** You can rename it with a “.CSV” extension instead of the default “.TXT” to save time and steps. The preferred export format is .CSV.)

