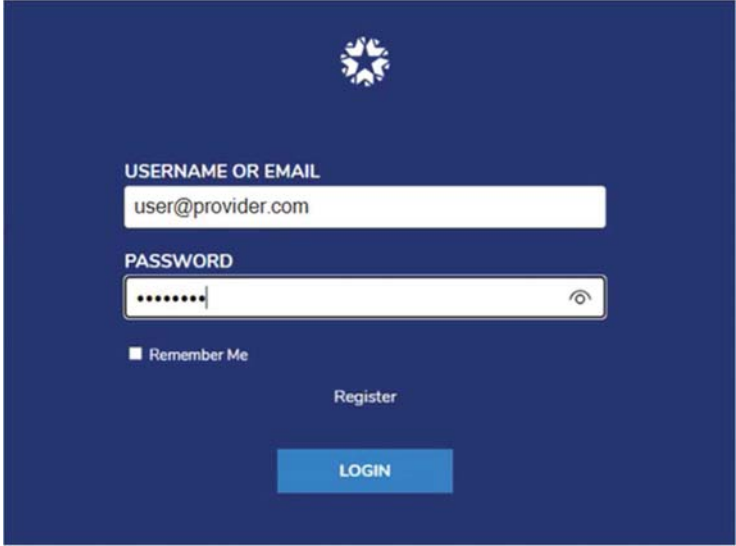
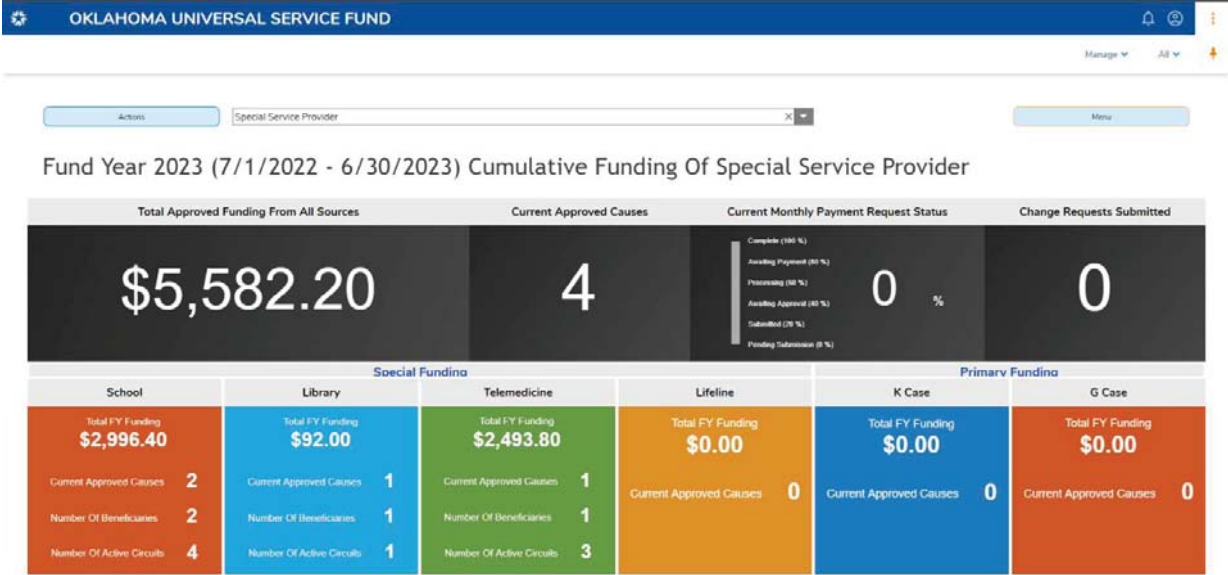



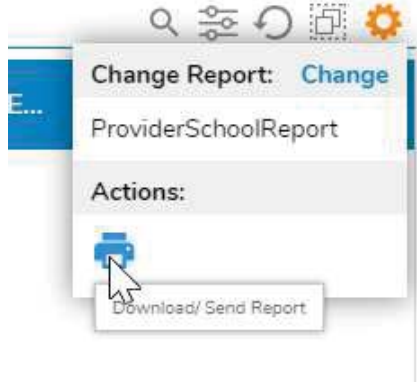







Training Handout: How to Export

Overview: The following training handout reviews step-by-step instructions on how to export (download or send) a data report when the option is available.

Step	Action																																																																
1.	Login: https://occ.decisions.com/ 																																																																
2.	Provider Dashboard/Home will automatically open upon login.  <table border="1" data-bbox="261 1430 1433 1801"> <thead> <tr> <th colspan="2">Total Approved Funding From All Sources</th> <th colspan="2">Current Approved Causes</th> <th colspan="2">Current Monthly Payment Request Status</th> <th colspan="2">Change Requests Submitted</th> </tr> </thead> <tbody> <tr> <td colspan="2">\$5,582.20</td> <td colspan="2">4</td> <td colspan="2">0 %</td> <td colspan="2">0</td> </tr> <tr> <td colspan="4">Social Funding</td> <td colspan="4">Primary Funding</td> </tr> <tr> <th>School</th> <th>Library</th> <th>Telemedicine</th> <th>Lifeline</th> <th>K Case</th> <th>G Case</th> <th colspan="2"></th> </tr> <tr> <td>Total FY Funding \$2,996.40</td> <td>Total FY Funding \$92.00</td> <td>Total FY Funding \$2,493.80</td> <td>Total FY Funding \$0.00</td> <td>Total FY Funding \$0.00</td> <td>Total FY Funding \$0.00</td> <td colspan="2"></td> </tr> <tr> <td>Current Approved Causes 2</td> <td>Current Approved Causes 1</td> <td>Current Approved Causes 1</td> <td>Current Approved Causes 0</td> <td>Current Approved Causes 0</td> <td>Current Approved Causes 0</td> <td colspan="2"></td> </tr> <tr> <td>Number Of Beneficiaries 2</td> <td>Number Of Beneficiaries 1</td> <td>Number Of Beneficiaries 1</td> <td></td> <td></td> <td></td> <td colspan="2"></td> </tr> <tr> <td>Number Of Active Circuits 4</td> <td>Number Of Active Circuits 1</td> <td>Number Of Active Circuits 3</td> <td></td> <td></td> <td></td> <td colspan="2"></td> </tr> </tbody> </table>	Total Approved Funding From All Sources		Current Approved Causes		Current Monthly Payment Request Status		Change Requests Submitted		\$5,582.20		4		0 %		0		Social Funding				Primary Funding				School	Library	Telemedicine	Lifeline	K Case	G Case			Total FY Funding \$2,996.40	Total FY Funding \$92.00	Total FY Funding \$2,493.80	Total FY Funding \$0.00	Total FY Funding \$0.00	Total FY Funding \$0.00			Current Approved Causes 2	Current Approved Causes 1	Current Approved Causes 1	Current Approved Causes 0	Current Approved Causes 0	Current Approved Causes 0			Number Of Beneficiaries 2	Number Of Beneficiaries 1	Number Of Beneficiaries 1						Number Of Active Circuits 4	Number Of Active Circuits 1	Number Of Active Circuits 3					
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Number Of Active Circuits 4	Number Of Active Circuits 1	Number Of Active Circuits 3																																																															

Step	Action
3.	<p>Anytime there is a gear icon  or Printer icon  in the corner of any system page (My To Do List, Historic Funding, Active Circuit Details, etc.), there is the option to export:</p> <ul style="list-style-type: none"> Click on the gear icon  to open the options provided: <div data-bbox="324 556 738 934" style="border: 1px solid gray; padding: 5px; margin: 10px 0;">  </div> Select the Printer icon  to download or send the report, contents, etc.
4.	<p>The Download/Send Report summary will automatically appear:</p> <div data-bbox="235 1092 893 1858" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Download/Send Report ✕</p> <p>▼ DISTRIBUTION OPTIONS</p> <p>Report Distribution Type</p> <p><input checked="" type="radio"/> Download</p> <p><input type="radio"/> Email Distribution</p> <p>Note</p> <p>Only data view will be downloaded for report having more than 10,000 rows.</p> <hr/> <p>▼ SETTINGS</p> <p>Format</p> <p>Excel ▼</p> <p>Output Type</p> <p>Default Excel Template ▼</p> <p style="text-align: right; color: blue; font-weight: bold;">PROCEED</p> </div>

Step	Action
5.	Select a Distribution Option: <ul style="list-style-type: none"> Download, or Email Distribution 
6.	Select a format setting via the dropdown: <ul style="list-style-type: none"> Excel, or Pdf 
7.	When complete, select "PROCEED" 
8.	The Export View screen will automatically appear: <ul style="list-style-type: none"> Select "Download Exported Report" 
9.	Navigate to the computer's Downloads to open: 