

Converting .TXT Files into an Excel Document to be Sorted, Manipulated, and Analyzed

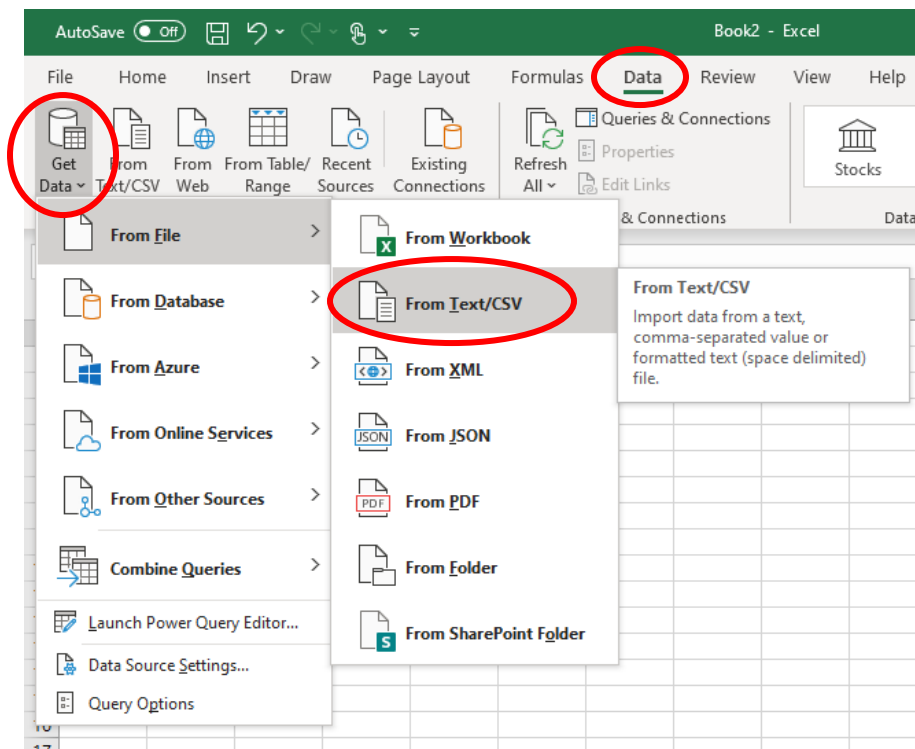
How-To Guide

Step 1

Double click on the **.txt file** that you would like to convert from the reports list in the Provider Portal. Rename and save this file to your desktop/other location on your computer so that you can easily access it by name to import.

Step 2

Open Microsoft Excel on your computer and create a new workbook. Click the Data tab in the Toolbar Ribbon at the top of the screen from within your Excel workbook. Navigate to the “Get Data” icon in the Data toolbar and select the option for “From Txt/CSV”. (Screenshot below.)



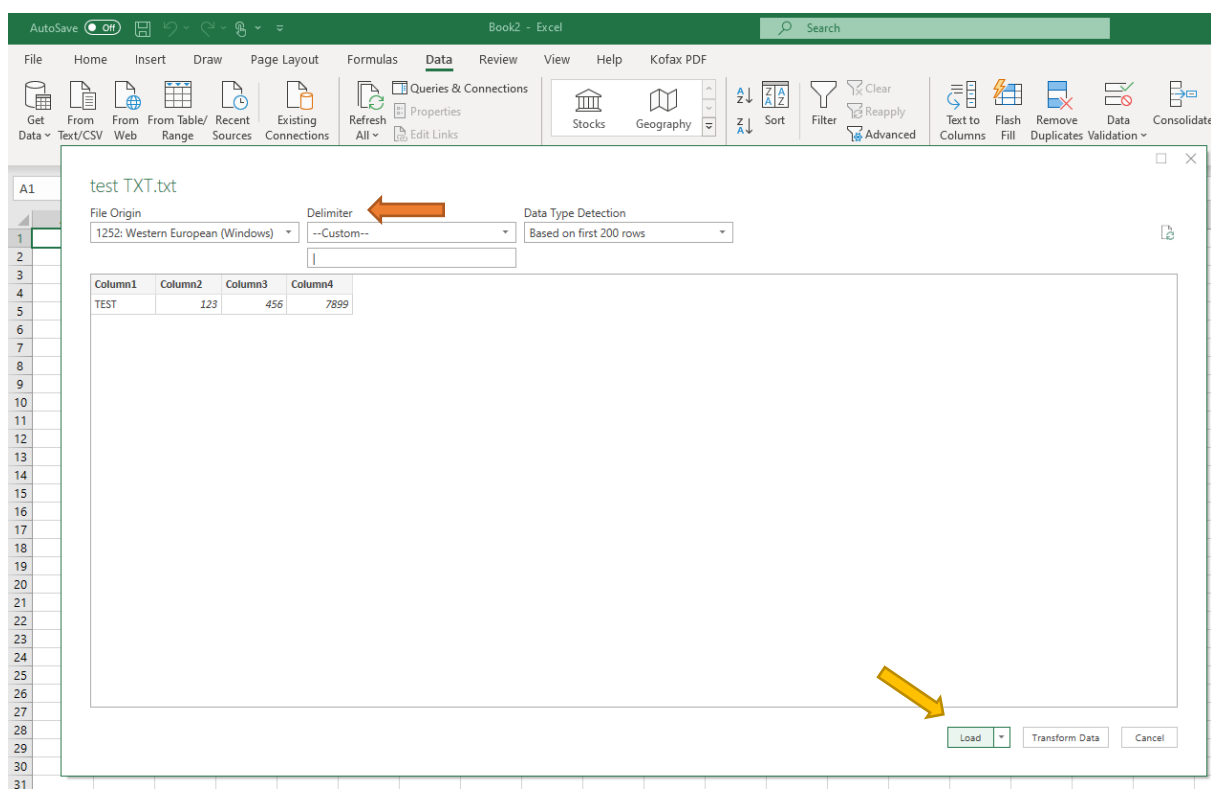
Step 3

When the “Import Data” menu pops up, find and select your saved .txt file from Step 1 to import into Microsoft Excel. Double click the file you want to import, and select the “Import” button.

Step 4

When the preview of the file pops up in the menu box, you should see the data displayed in columns and the “Delimiter” option should be defaulted to “Custom.” An orange arrow in the screenshot below highlights the Delimiter option.

If the data displays accurately in columns, select the “Load” button. A yellow arrow in the screenshot below highlights the Load option.



Step 5

The data should now be in your Excel workbook with each data element in a separate column. You can rename and save your file and sort, manipulate, analyze, and summarize as needed.

Need Assistance?

For assistance, please contact your [Provider Engagement Coordinator](#) directly.

If you are enrolled with Payspan and receive PMPM payments via EFT, you can also download a member-level detail report from your Payspan portal.