

# Assistance Reporting Tool

## Module: How to Export a Case to Microsoft Word

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**TRICARE Management Activity  
Beneficiary Education & Support  
Customer Service Support Branch**

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## Introduction

The Assistance Reporting Tool (ART) allows you to export case data and notes to a Microsoft Word document. This allows you to share your case with individuals who don't use the system.

Remember to protect personal health information (PHI) and personal identifiable information (PII) by encrypting your document if you email or fax the document to someone else.

## How to Export a Case to Microsoft Word

**Step 1:** Click on the case number of the case you want to export data and notes from.

The screenshot shows the top navigation bar with 'CASES' and 'REPORTS' tabs, and a search field containing 'SSN, Case #'. Below this is a secondary navigation bar with 'PENDING CASES' (highlighted in red), 'REFERRED IN', and 'REFERRED OUT' buttons, along with a '+ NEW CASE' button. A table of cases is displayed below, with the following data:

Priority	Case	Case Type	Name	Provider	Date Contacted	Time Frame	Follow Up
H	80796	Debt Collection Case (60 days)	Thompson, Bort	All Hands MRI	03/08/2011	336/60	06/21/2012

Below the table is a pagination bar with 'First', 'Previous', '1', 'Next', and 'Last' buttons.

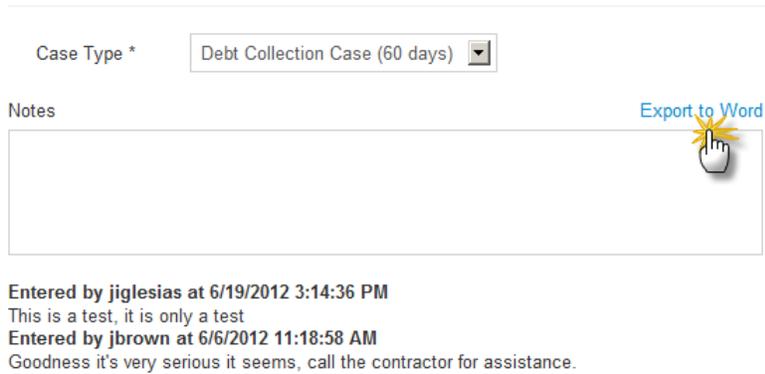
The "Basic Information" tab displays.

Case 80796: Thompson, Bort

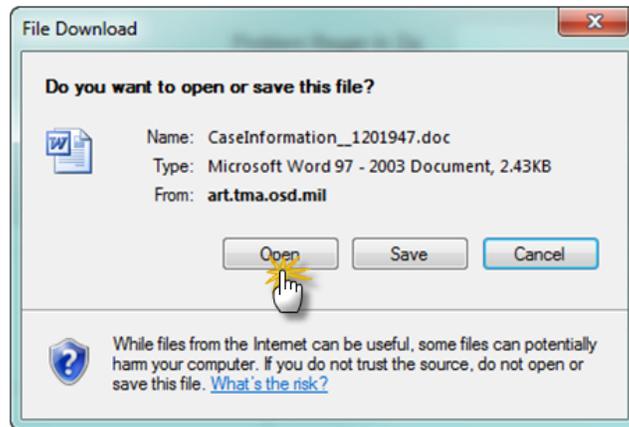
The screenshot shows the 'Basic Information' tab selected. The form contains the following fields:

- Last Name: Thompson
- First Name: Bort
- Provider: All Hands MRI
- SSN: 123-45-6789
- DoD Benefits Number: 125454511-11
- Date of Birth: 12/25/1978
- Primary Phone: 555-555-5555 (Cell)
- Alternate Phone: Choose, if known
- Street: [Empty]
- City: [Empty]
- State: Choose, if known
- Country: Choose, if known
- Email: [Empty]
- Beneficiary's Current Plan/Program: TRICARE Prime
- Beneficiary Category: Active Duty Family Member
- Sponsor's Branch of Service: USA
- Sponsor's Rank/Grade: Choose, if known
- Date Contacted: 03/08/2011
- How Contacted: Phone
- Who Contacted You: Beneficiary/Sponsor
- Other Individuals Contacted: [Empty]
- Problem Began In Region: North
- Problem Began In State/Country: Choose, if known
- Problem Began In Zip: [Empty]

**Step 2:** Go to the bottom of the page and click the “Export to Word” link. This link appears on top of the “Notes” section and is available within each tab.



A pop-up window displays asking “Do you want to open or save this file?”



**Step 3:** To quickly open the file in Microsoft Word, click the “Open” button; to save it to a location of your choice, click the “Save” button. In the example above, we chose to open the file.

The Microsoft Word document displays.

This document may contain information covered under the Privacy Act, 5 USC 552(a), and/or the Health Insurance Portability and Accountability Act (PL 104-191) and its various implementing regulations and must be protected in accordance with those provisions. Healthcare information is personal and sensitive and must be treated accordingly. If this correspondence contains healthcare information, it is being provided to you after appropriate authorization from the patient or under circumstances that don't require patient authorization. You, the recipient, are obligated to maintain it in a safe, secure and confidential manner. Redisclosure without additional patient consent or as permitted by law is prohibited. Unauthorized redisclosure or failure to maintain confidentiality subjects you to application of appropriate sanction. If you have received this correspondence in error, please notify the sender at once and destroy any copies you have made.

## Case Information for #80796

### Basic Information

Last Name: Thompson  
First Name: Bort  
Provider: All Hands MRI  
DoD Benefits Number: 125454511-11  
Date of Birth: 12/25/1978  
Primary Number: 555-555-5555  
Alternate Number:  
Street:  
City:  
State:  
Country:  
Zip/APO:  
Email:  
Beneficiary's Current Plan/Program: TRICARE Prime  
Beneficiary Category: Active Duty Family Member  
Sponsor's Branch of Service: USA  
Sponsor's Rank/Grade:  
Case Type: Debt Collection Case (60 days)  
Date Contacted: 3/8/2011  
How Contacted: Phone  
Who Contacted You: Beneficiary/Sponsor  
Other Individuals Contacted:  
Problem Began In Region: North  
Problem Began In State/Country:  
Problem Began In ZIP:

### Claims/Debt Information

Date Claim Processed: 1/1/0001  
Claim Number:  
Date of Service: 1/1/0001  
Services Provided By:  
Provider Number:  
Amount Billed:  
Amount in Question:  
Collection Agency Name:  
Collection Agency POC:  
Collection Agency Number:  
Collection Agency Acct/Ref Number:  
Misc. costs (atty. fees, interests, etc.):

Beneficiary Owes:  
TRICARE Owes:  
Provider Write-Off Amount:

### 1637 Information

#### Notes:

Entered by jglesias at 6/19/2012 3:14:36 PM  
This is a test, it is only a test  
Entered by jbrown at 6/6/2012 11:18:58 AM  
Goodness it's very serious it seems, call the contractor for assistance.

The document will have the following information:

- Privacy Act Statement
- Case data from the “Basic Information” tab (SSN won't display)
- Case data from the “Claims/Debt Information” tab
- “1637 Information” (if applicable)
- User “Notes”

## How to Password Protect your Microsoft Word Document

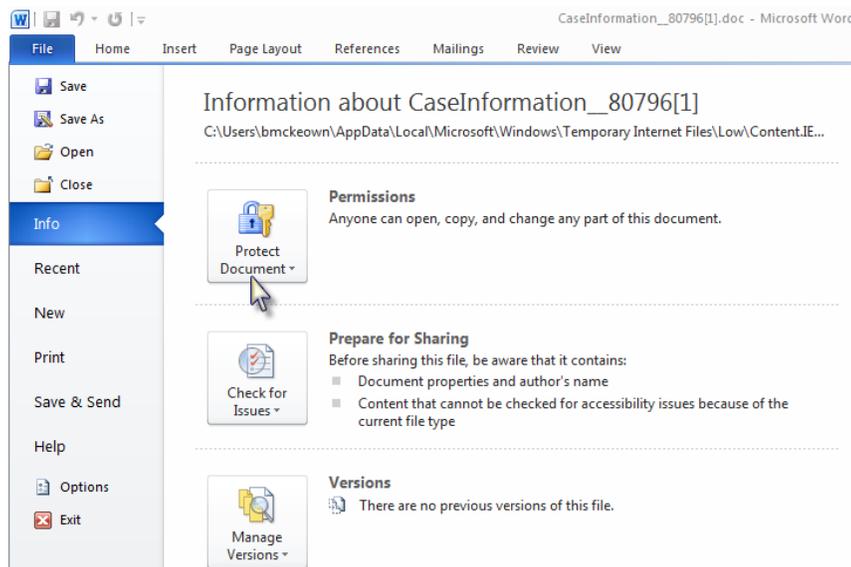
If you choose to save your exported case in Microsoft Word, remember to restrict access to the document with a password. This protects any PII/PHI and ensures you have control of who can view the document.

(Please note the instructions below are based on Microsoft Word 2010.)

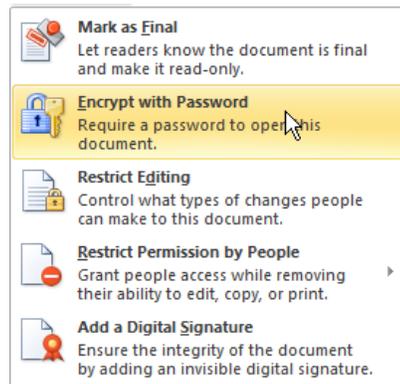
**Step 1:** In the Word document, go to “File.”



**Step 2:** Click on “Protect Document.”



**Step 3:** From the “Protect Document” drop-down menu, click on “Encrypt with Password.”



**Step 4:** Create a password and click the “OK” button.



**Step 5:** Re-enter your password and click the “OK” button again.



Congratulations! You learned how to export a case to Microsoft Word and how to protect your document! If you have questions or need help, please email [BCACDCAO@tma.osd.mil](mailto:BCACDCAO@tma.osd.mil).