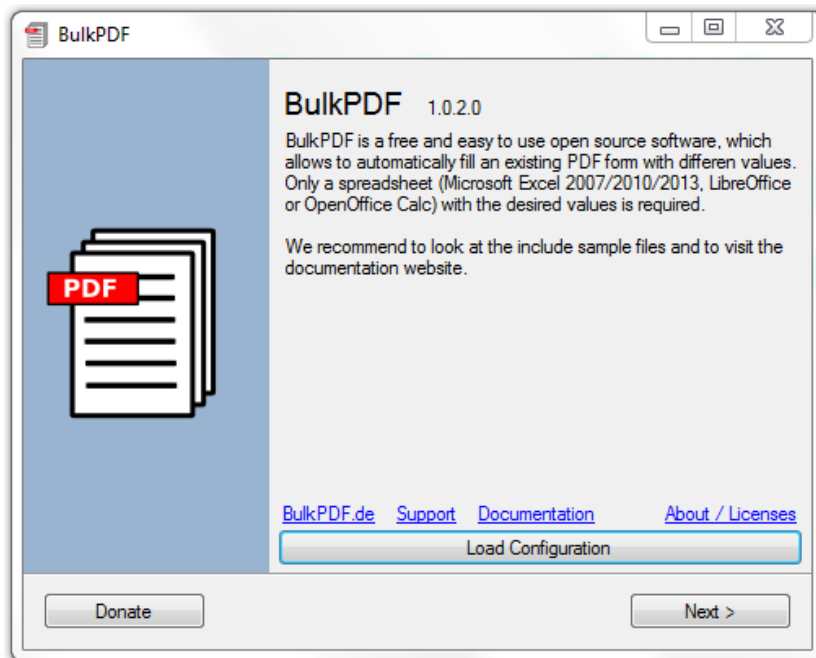# Bulk Entry of Client ID and Reporting Unit for Consumer Perception Survey Forms

Hand entering client numbers and program codes onto the California Department of Health Care Services (DHCS) twice yearly Consumer Perception Survey forms is a daunting task. The good news is that, if done correctly, a list of client numbers (PATID) and corresponding reporting unit (program code) can be pre-entered into PDFs for later printing, saving a lot of effort, time, and perhaps paper. In an effort to help programs and improve efficiency, we have created modified versions of the DHCS forms. These modified forms allow data entry into the client number and reporting unit fields. Be advised that it is *your* responsibility to ensure this is done correctly, and can be scanned by our software.

These SFDPH Behavioral Health Services modified PDFs can be used in conjunction with software to generate a PDF for each client from an Excel (or other) spreadsheet. The spreadsheet just needs to contain columns with client number and program code (reporting unit). If you intend to automate the entry of client ID and reporting unit you should use the forms supplied by SFDPH BHS Quality Management**, do not** use any other forms for this purpose.

The bulk entry of the data from the spreadsheet is accomplished by the freeware program called **BulkPDF**. Other programs exist that can accomplish the task, but they have not been tested by BHS Quality Management.
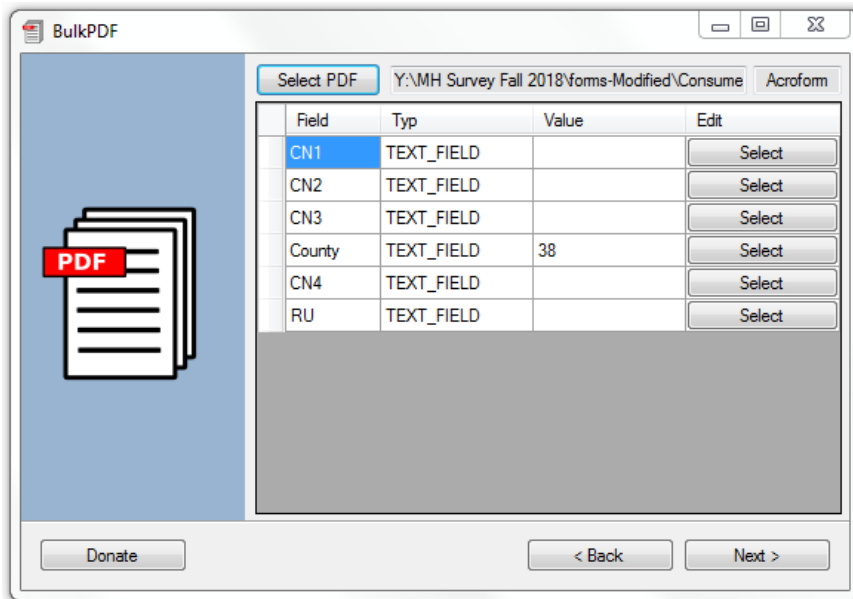
http://bulkpdf.de/en



You can run **BulkPDF** by simply double clicking on the file BulkPDF.exe, or if you have installed it in Windows, you can run it from the icon. The program is easy to use.

Click **Next >**.   A dialog box will appear that asks you to load the spreadsheet. You can browse to select your spreadsheet file (Excel). After you select the spreadsheet file you can specify which tab (sheet) to use with the drop down selector.

 Ideally you will have a spreadsheet with a separate tab (sheet) for each type of form, and the sheets will have one row for each client that needs that particular type of form. As example, all the adults that speak English (Adult MHSIP English form) would be in one sheet in an Excel file, all the youth over 13 that speak Spanish (YSS Spanish form) in another sheet, etc. The sheets should have at least two columns, the client number (PATID) and the reporting unit (program code), it can have more columns (i.e. client name) but you only need those two, unless you wish to use client name in the name of the PDF. Remember that files with names or client numbers are protected health information.
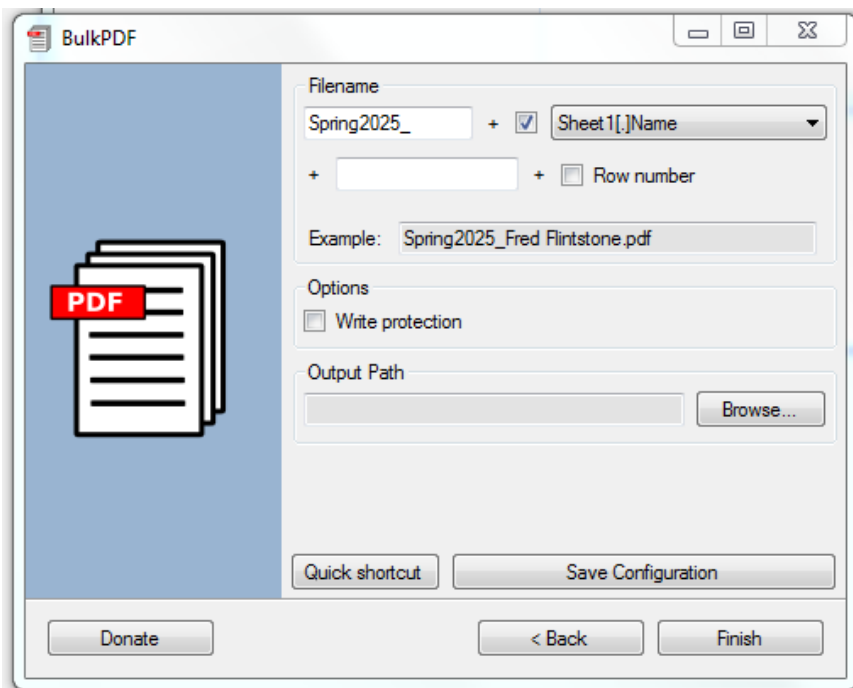
Click **Next >** and a new dialog box appears for selecting the PDF.

The data entry fields will be listed. They include the client number fields (CN1-CN6, one for each page, usually four but sometimes up to six) and the reporting unit field (RU). The county field has been pre-entered with our county number (38) and nothing needs to be done with that field.

For each client number (CN1 to CN6) and the RU, click the **Select** button for that field to fill it with the spreadsheet data. As example "CN1". The option box appears when you click select for that field. Click on "Use value from data source" then from the drop down selection tool pick the column of your spreadsheet that contains the client numbers, then click **set**. Repeat for the other client number and finally the reporting unit field (RU) using the column with program code (RU).



When you have assigned all fields to the correct data column, click on **Next >**. The image shows the dialog box where you auto assign each PDF a unique name. The program lets you add a prefix, and you can add the content of a column from the spreadsheet table such as the client name or number, and follow that with additional text and the row number from the spreadsheet table. Using the client number or client name in the PDF name is important to ensure the right person gets the form. You could use client names to make file names with the format: **Spring2025_name.pdf**. Lastly, select a directory (Output Path) where you want the generated PDFs saved, and click **Finish**. **BulkPDF** will produce a PDF for each row of the spreadsheet, each with a unique name identifying the client corresponding to the ID number printed on the form. The file name can use either the client's name or client number from the spreadsheet.

## General Tips

**Print only as needed!** Print on demand when a client comes into the clinic. The procedures described will generate a PDF for each person, keep in mind that these PDFs are PHI and are subject to the cautions required of protected health information. Just the same, they can reside on a computer and printed when a specific client comes into the clinic. It should not be necessary to print more forms than are actually offered to your clients. A person is part of the survey only when they receive face-to-face services during the five days of the survey period, and if they are actually given an opportunity to complete the survey. The only blank surveys that should exist are from clients who explicitly refuse to complete it, after being encouraged to participate and given the necessary time and space to complete it.

Thank you for helping to reduce effort and waste.