2016

SMART Exporting

Exporting SMART Data to Excel and Access

This updated document provides detailed steps in exporting SMART data to Microsoft Excel, and importing SMART data from Excel to Microsoft Access.

SMART

Exporting Data from SMART to Microsoft Excel

1. Go to the Menu Tree, and click **Reports**. This will open the Reports Catalog.
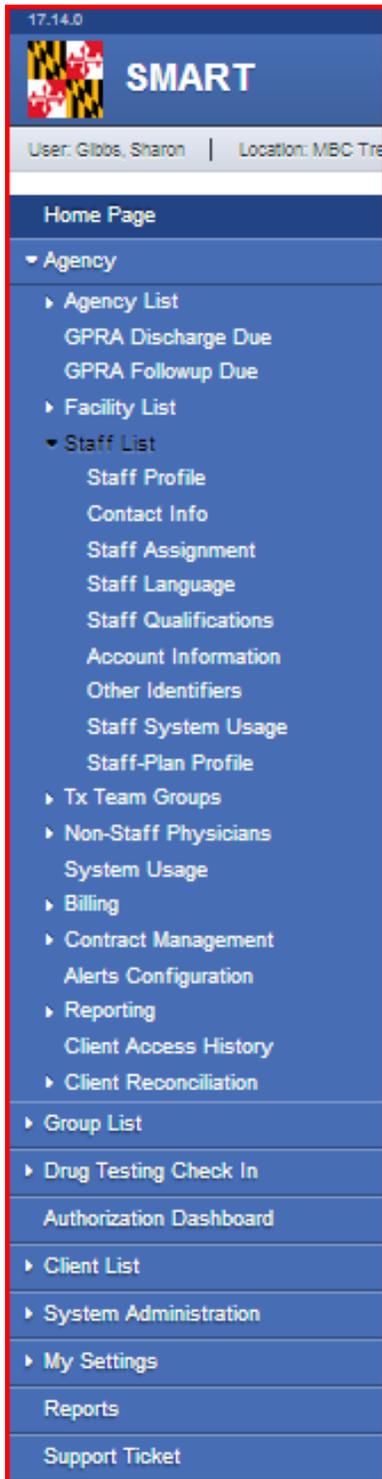
IMPORTANT- Remember once data is exported from SMART and saved on your computer it is no longer secured data. You are now legally responsible for it. Make sure you save it where it is password protected or delete it from your desktop and trash can immediately.

Click Reports

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2. Go to the Miscellaneous section of the screen, and select Admission Data.

Note: The steps outlined in this document can be used to export data from the following reports in the SMART Report Catalog. (*Admissions: Client Demographics, Program Client Movement, Referrals in by Agency, Referrals out by Agency, Program Enrollment Counts, Client List by Program, Unfinished Client Activities, Admission Data, Client Profile Data, Combined Note Data, Discharge Data, and Encounter Data*.)

Report Catalog
Title
Access
Admissions: Client Demographics
Agency Client Movement
Client Demographic by Substance
Program Client Movement
Referrals in by Agency
Referrals out by Agency
Waitlist by Agency, Facility & Program
Wait List: Statistics by Region
QA/QC
Program Enrollment Counts
Client List by Program
Agency/Facility Client Terminations
Programs-Staffing Allocations
Unfinished Client Activities
Security
Staff Permissions Summary
Miscellaneous
Admission Data
ATR Voucher Data
ATR Voucher Transaction Data
Client Profile Data
Combined Note Data
Discharge Data
Encounter Data
GPRA Assessment Data
GPRA Interview Compliance Report
GPRA Interview Data

Under Miscellaneous, use Admission Data and/or Discharge Data.

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3. Enter a date range or leave blank.

4. Click **Export**.

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4. A dialogue box will open. If you will be exporting to create an Excel file, save to your Desktop, and click **Save**.
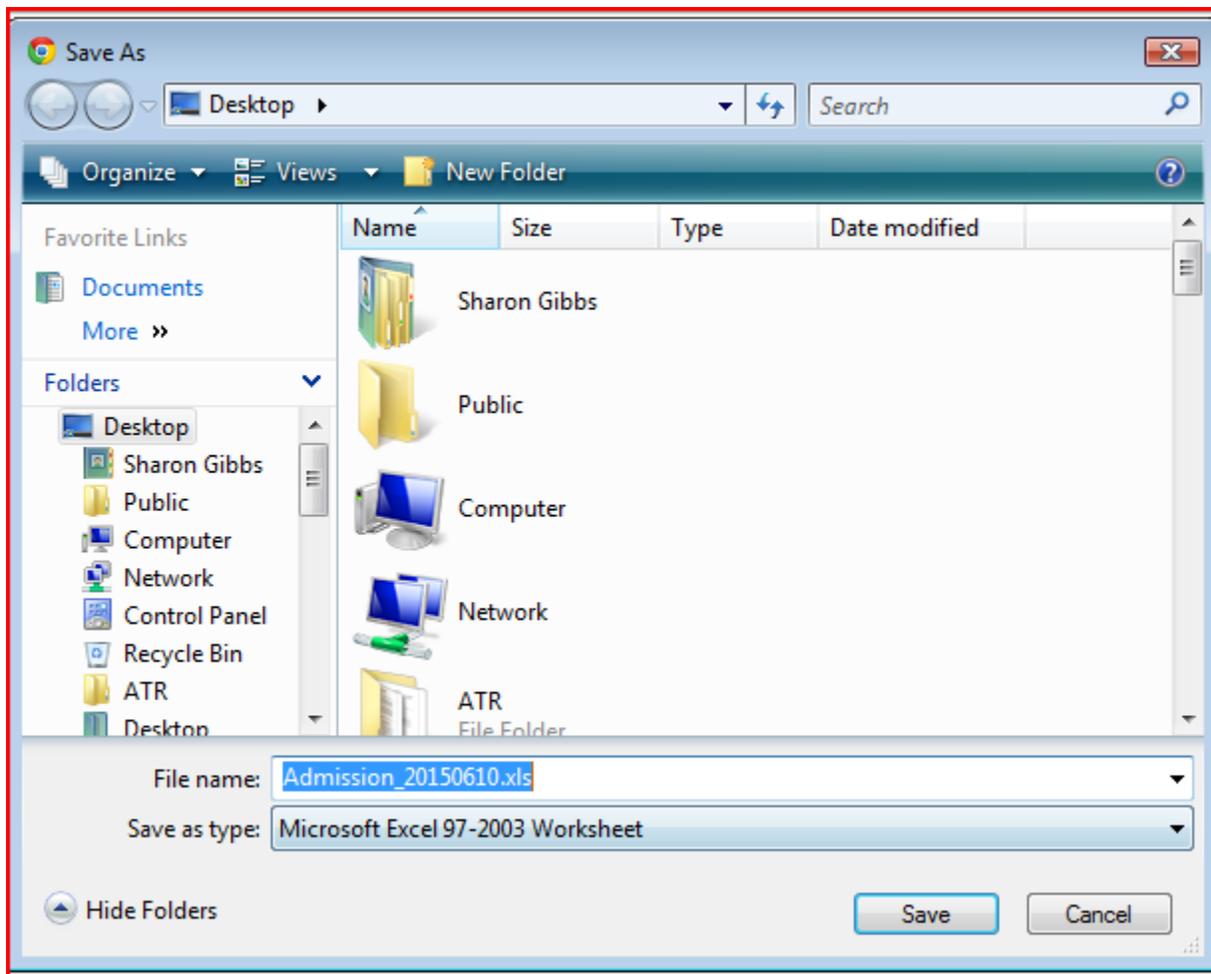
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5. If you will be importing data from Excel to Access, please complete the following steps *prior* to saving to your Desktop:

      a. Go to the File name field, and change your file to a txt file. (from Admission_20150610.xls to Admission_20150610.txt); and

      b. Go to the 'Save as Type' field, and change it to 'All Files'.

      c. Click **Save**.
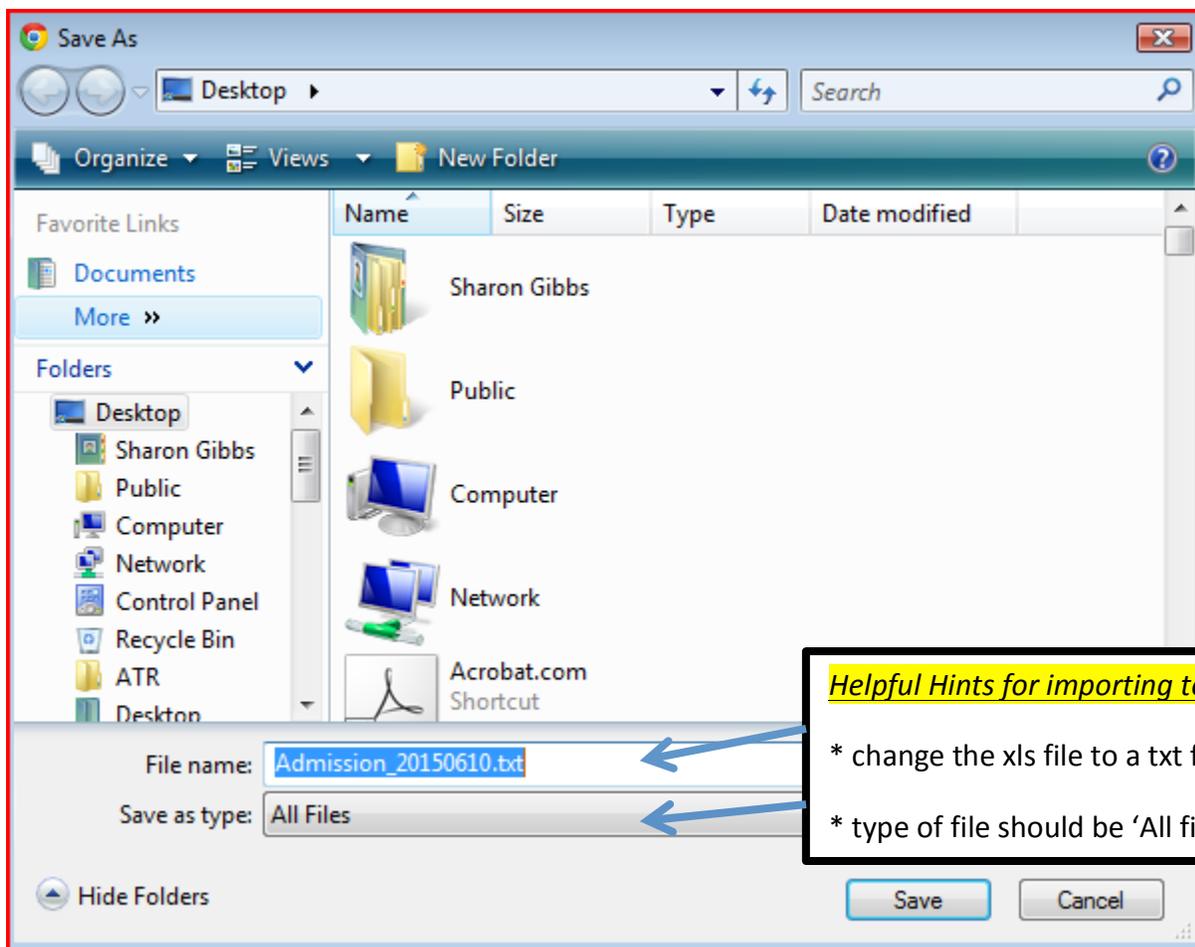
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6. Click the tab at the bottom of the screen to open the excel spreadsheet.

Click here to open your text file.
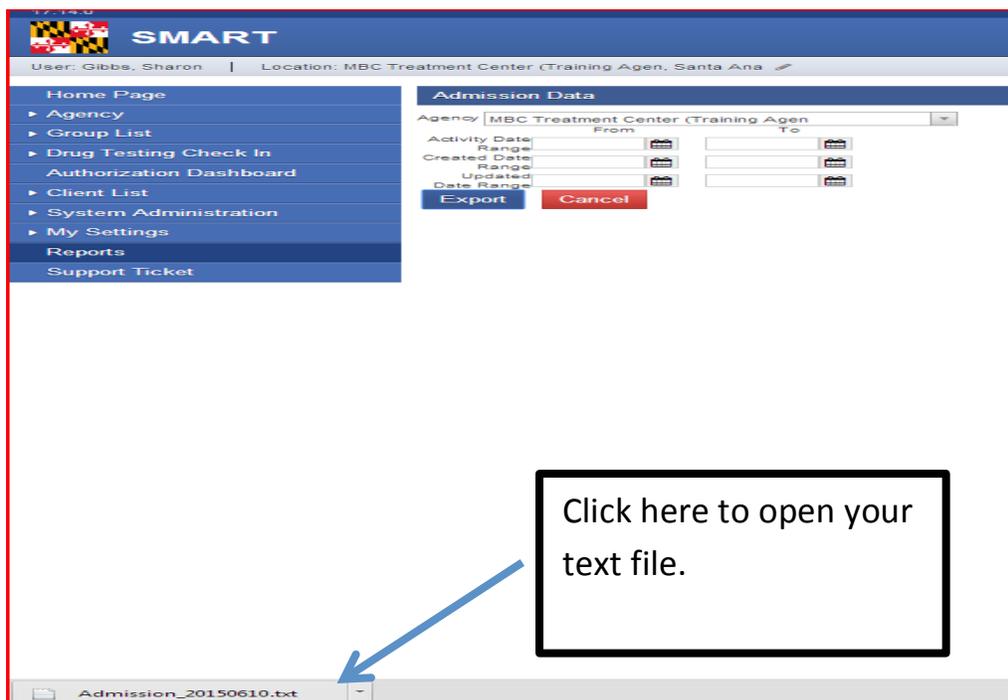
7. A dialogue box will open, click **Yes**. This will open the Excel spreadsheet.
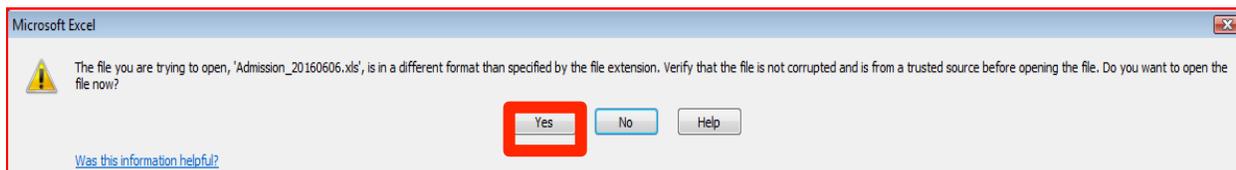
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	Admission	Agency_N	Client_ID	Unique_C	Client_Las	Client_Fir	Client_Ful	Birth_Date	Ethnicity	Gender_D	Agency_IC	Client_Int	Case_Num	Intake_Date	Case_Stat	County_N	Referral_S	Intake_At	Case_Close_	Contact_T	Presentin	Admitted	Is_SA_Pat
2		MBC Treat	888226	F01016651	Wayward	Hua	Wayward,	1/1/1966	Not of His	Female	700	1426121	1	8/14/2009	Open Acti	Montgom	Juvenile J	Santa Ana		Other	fghfgjh	Santa Ana	
3		MBC Treat	884564	M0815749	Bunny	Paul	Bunny, Pa	8/15/1974		Male	700	1696183	2	4/28/2010	Open Acti	Montgom	Pre-Trial S	Santa Ana			My mothe	Costa Mesa	
4		MBC Treat	937232	M0812549	Mouse	Mickey	Mouse, M	8/12/1954	Not of His	Male	700	1717144	2	6/2/2010	Open Acti	Montgom	Other Hea	Costa Mesa			Client has	Costa Mesa	
5		MBC Treat	1130686	M0613558	Brown	Ray	Brown, Ra	6/13/1955	Not of His	Male	700	1793694	1	9/17/2010	Open Acti	Howard	Other Crir	Santa Ana			I need so	Santa Ana	
6		MBC Treat	923940	M0823778	Bunker	Archie	Bunker, A	8/23/1977		Male	700	1800246	2	9/28/2010	Open Acti	Montgom	Juvenile J	Costa Mesa			court refe	Costa Mesa	
7		MBC Treat	1135625	M0101763	Revere	Paul	Revere, Pi	1/1/1976	Not of His	Male	700	1800992	1	9/29/2010	Open Acti	Montgom	Probation	Santa Ana			I was ridir	Costa Mesa	
8		MBC Treat	1481794	M0131986	jesus	nathaniel	jesus, natl	1/31/1998	Puerto Ric	Male	700	2333456	1	1/23/2013	Open Acti	Baltimore	Drug Cour	Costa Mesa		By Appoir	opiate de	Costa Mesa	
9		MBC Treat	1673052	M0504709	Smith	Frank	Smith, Fra	5/4/1970	Not of His	Male	700	2632027	1	5/1/2014	Closed	Prince Ge	Parole	Santa Ana	5/18/2014		I want to t	Santa Ana	
10		MBC Treat	1674577	M0604919	Bond	James	Bond, Jam	6/4/1991	Not of His	Male	700	2634165	1	5/1/2014	Closed	Prince Ge	Parole	Santa Ana	5/21/2014		I want to t	Santa Ana	
11		MBC Treat	1673152	M0509839	EA	SMART	EA, SMAR'	5/9/1983	Not of His	Male	700	2632172	1	5/1/2014	Closed	Prince Ge	Parole	Santa Ana	5/19/2014		I want to t	Santa Ana	
12		MBC Treat	1683311	M0101804	mouse	Mickey	mouse, M	1/1/1980	Not of His	Male	700	2647162	1	6/1/2014	Closed	Montgom	Drug Cour	Santa Ana	6/13/2014		i got caugl	Santa Ana	
13	172348	MBC Treat	250982	M0601640	Pig	Porky	Pig, Porky	6/1/1964	Not of His	Male	700	292379	1	8/15/2007	Open Acti	Prince Ge	DSS Asses	Santa Ana			I want to t	Santa Ana	
14	237296	MBC Treat	308509	F10106395	Jones	Jennifer	Jones, Jer	10/10/1963		Female	700	365565	1	10/9/2007	Open Acti	Prince Ge	Alcohol ar	Santa Ana				Santa Ana	
15	237308	MBC Treat	308523	M10100689	James	Jessie	James, Jes	10/10/1968	Not of His	Male	700	365582	1	10/15/2007	Closed	Baltimore	Alcohol/D	Santa Ana	7/30/2009			Santa Ana	
16	265820	MBC Treat	659705	F06016615	Flintstone	Peebles	Flintstone	6/1/1966	Not of His	Female	700	1082291	1	12/1/2007	Open Acti	Prince Ge	Alcohol/D	Santa Ana			Sweet & s	Santa Ana	
17	265862	MBC Treat	659871	M0707661	Wayne	Bruce	Wayne, Br	7/7/1966	Not of His	Male	700	1082509	1	12/1/2007	Open Acti	Prince Ge	Alcohol/D	Santa Ana				Santa Ana	
18	275487	MBC Treat	686932	M0702660	Parker	Peter	Parker, Pe	7/2/1966		Male	700	1122148	1	12/7/2007	Open Acti	Montgom	Other Hea	Santa Ana				Santa Ana	
19	267487	MBC Treat	664945	F06016676	Taylor	Pilar	Taylor, Pil	6/1/1966	Not of His	Female	700	1090294	1	12/7/2007	Open Acti	Montgom	Drug Cour	Santa Ana				Santa Ana	
20	263911	MBC Treat	605682	M0731802	Potter	Harry	Potter, Ha	7/31/1980	Not of His	Male	700	990779	1	12/6/2007	Open Acti	Anne Arur	School	Santa Ana				Santa Ana	
21	275494	MBC Treat	686941	F07076732	Joy	Frances	Joy, Franc	7/7/1967		Female	700	1122164	1	2/20/2008	Open Acti	Howard	Drug Cour	Santa Ana				Santa Ana	
22	275489	MBC Treat	686936	M0711763	Chan	Jackie	Chan, Jack	7/11/1976		Male	700	1122154	1	2/20/2008	Open Acti	Kent	Drug Cour	Santa Ana				Santa Ana	
23	325077	MBC Treat	605721	F03053127	Clinton	Hillary	Clinton, H	3/5/1931	Not of His	Female	700	990780	1	12/7/2007	Open Acti	Washingt	Individual	Santa Ana			Strong ne	Santa Ana	
24	411430	MBC Treat	937232	M0812549	Mouse	Mickey	Mouse, M	8/12/1954	Not of His	Male	700	1490719	1	10/9/2009	Open Acti	Montgom	Drug Cour	Santa Ana			client stat	Santa Ana	
25	414211	MBC Treat	956445	F02216523	Van Pelt	Lucy	Van Pelt, l	2/21/1965	Not of His	Female	700	1513819	1	10/16/2009	Open Acti	Montgom	Alcohol/D	Santa Ana			ljl;fgjgk	Santa Ana	
26		MBC Treat	1047337	F08155687	TAP	Susan	TAP, Susai	8/15/1956	Not of His	Female	700	1656590	1	3/2/2010	Open Acti	Montgom	Drug Cour	Santa Ana			Alcohol ar	Santa Ana	
27	467813	MBC Treat	888038	F01013065	Adell	Adigun	Adell, Adi	1/1/1969	Not of His	Female	700	1425846	1	8/14/2009	Open Acti	Montgom	Juvenile J	Santa Ana		Other	does not t	Santa Ana	
28	469547	MBC Treat	1047337	F08155687	TAP	Susan	TAP, Susai	8/15/1956	Not of His	Female	700	1656590	1	3/2/2010	Open Acti	Montgom	Drug Cour	Santa Ana			Alcohol ar	Santa Ana	
29	473168	MBC Treat	938616	M0601871	pig	pork	pig, pork	6/1/1987	Puerto Ric	Male	700	1492394	1	10/13/2009	Open Acti	Montgom	Individual	Santa Ana			efdfffdf	Santa Ana	
30	517551	MBC Treat	923939	F05195587	Tate	Louise	Tate, Loui	5/19/1955	Not of His	Female	700	1472817	1	9/22/2009	Open Acti	Prince Ge	Drug Cour	Santa Ana			eiieieieie	Santa Ana	
31	495194	MBC Treat	1132940	F07118223	Care	Continuin	Care, Cont	7/11/1982	Not of His	Female	700	1797136	1	8/15/2010	Open Acti	Prince Ge	Drug Cour	Santa Ana			I want to t	Santa Ana	
32	494311	MBC Treat	888226	F01016651	Wayward	Hua	Wayward,	1/1/1966	Not of His	Female	700	1426121	1	8/14/2009	Open Acti	Montgom	Juvenile J	Santa Ana		Other	fghfgjh	Santa Ana	
33	494332	MBC Treat	928226	F02147067	Littletoes	Angela	Littletoes,	2/14/1970	Not of His	Female	700	1478495	1	9/25/2009	Open Acti	Baltimore	State Pris	Santa Ana			bvc	Santa Ana	
34	497583	MBC Treat	888170	F01014505	Hawk	Kitty	Hawk, Kitt	1/1/1955	Not of His	Female	700	1426050	1	8/14/2009	Open Acti	Montgom	Juvenile J	Santa Ana		Other	Referred I	Santa Ana	
35	502506	MBC Treat	1149548	F08154405	Jones	Sue	Jones, Sue	8/15/1944	Not of His	Female	700	1822686	1	11/2/2010	Closed	Prince Ge	Drug Cour	Santa Ana	11/2/2010		I want to t	Santa Ana	
36	519955	MBC Treat	923944	M0827878	McQueen	Lightning	McQueen	8/27/1987	Not of His	Male	700	1881973	1	2/13/2011	Open Acti	Montgom	Drug Cour	Santa Ana			I want to t	Santa Ana	
37	522271	MBC Treat	1194386	F05197654	Cares	Denise	Cares, Der	5/19/1976	Not of His	Female	700	1889970	1	2/28/2011	Open Acti	Montgom	Drug Cour	Santa Ana			I want to t	Santa Ana	
38	562421	MBC Treat	1286538	M0823693	Group	User	Group, Us	8/23/1969	Not of His	Male	700	2035983	1	10/11/2011	Open Acti	Prince Ge	Drug Cour	Santa Ana			Drug Free	Santa Ana	
39	586349	MBC Treat	1341255	M0222780	ROSC	Frank	ROSC, Frai	2/22/1978	Not of His	Male	700	2120995	1	2/23/2012	Open Acti	Montgom	Drug Cour	Santa Ana			i want to t	Santa Ana	
40	626678	MBC Treat	1086979	M0904780	Pig	Pork	Pig, Pork	9/4/1978	Not of His	Male	700	1718395	1	6/3/2010	Closed	Montgom	Drug Cour	Santa Ana	10/20/2014		jsdfioeor	Santa Ana	
41	630876	MBC Treat	1287960	F03036595	Crumb	Ava	Crumb, Av	3/3/1965	Other Hisr	Female	700	2038369	1	3/25/2010	Open Acti	Pennsylva	Parole	Santa Ana		Other	dsnfa,afdi	Santa Ana	

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Importing from Microsoft Excel to Microsoft ACCESS

1. Open Microsoft ACCESS.
2. Click **Create**.

Click Create.
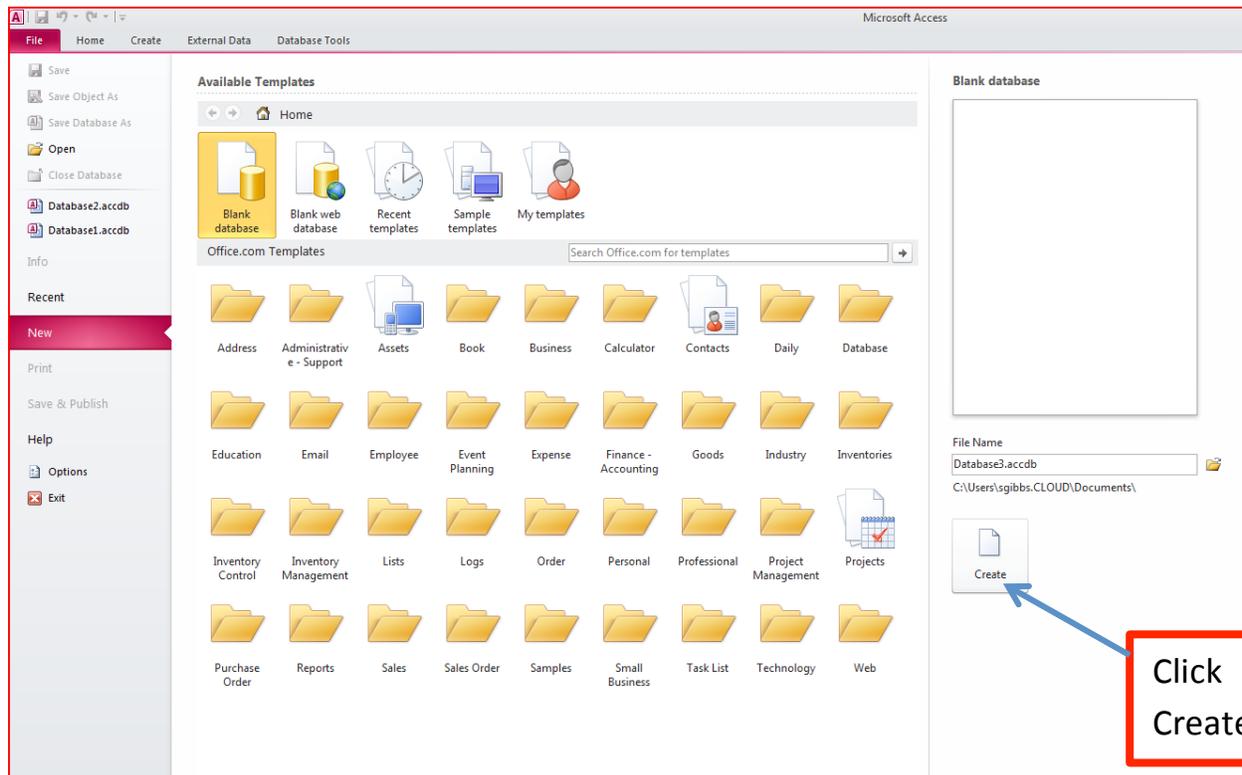
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3. Locate and click on the External Data tab.
4. Click the Excel Icon.
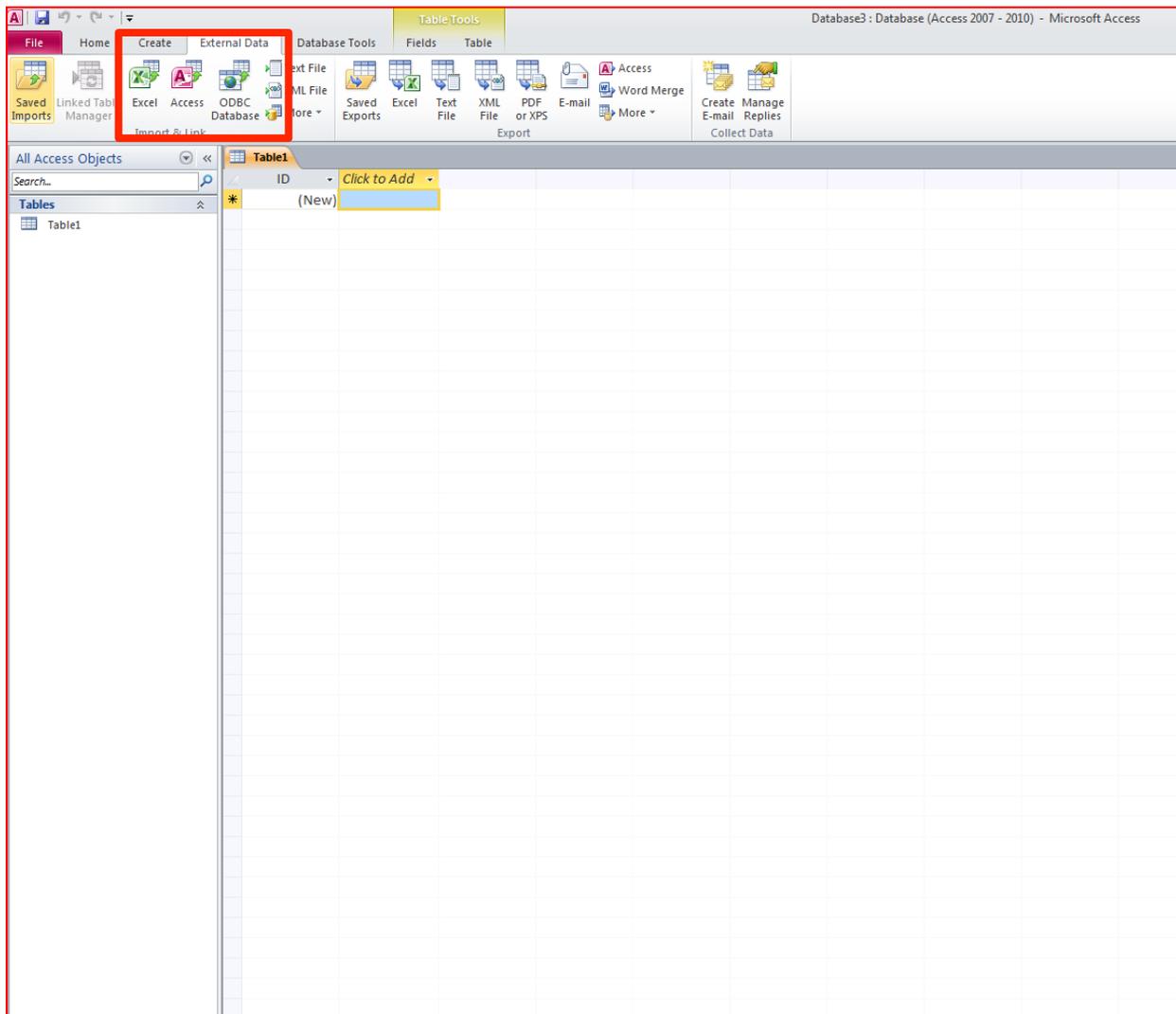
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4. Click **Browse** to search for your file.
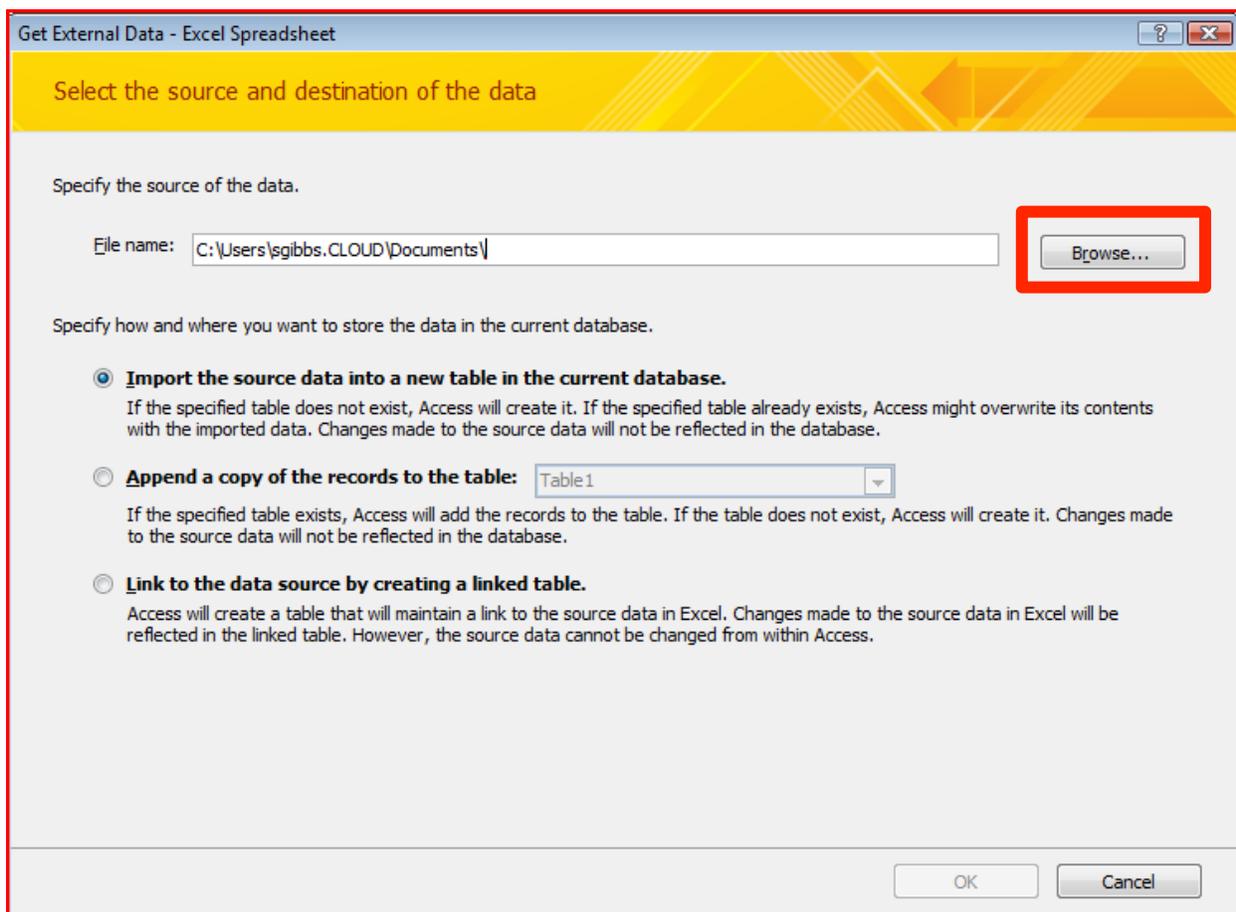
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5. Search and select the appropriate file.

6. Click **Open**.
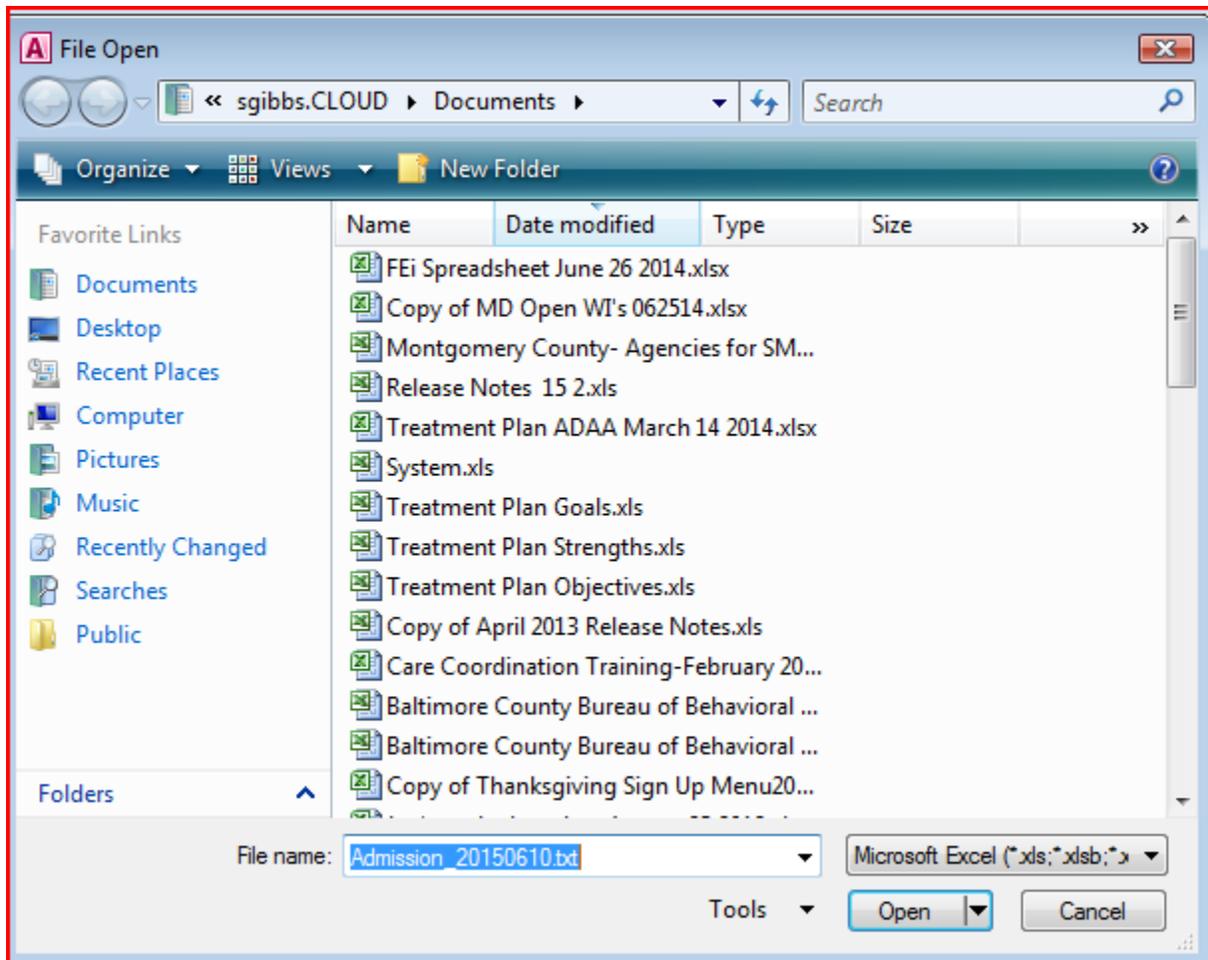
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7. Click **OK**.
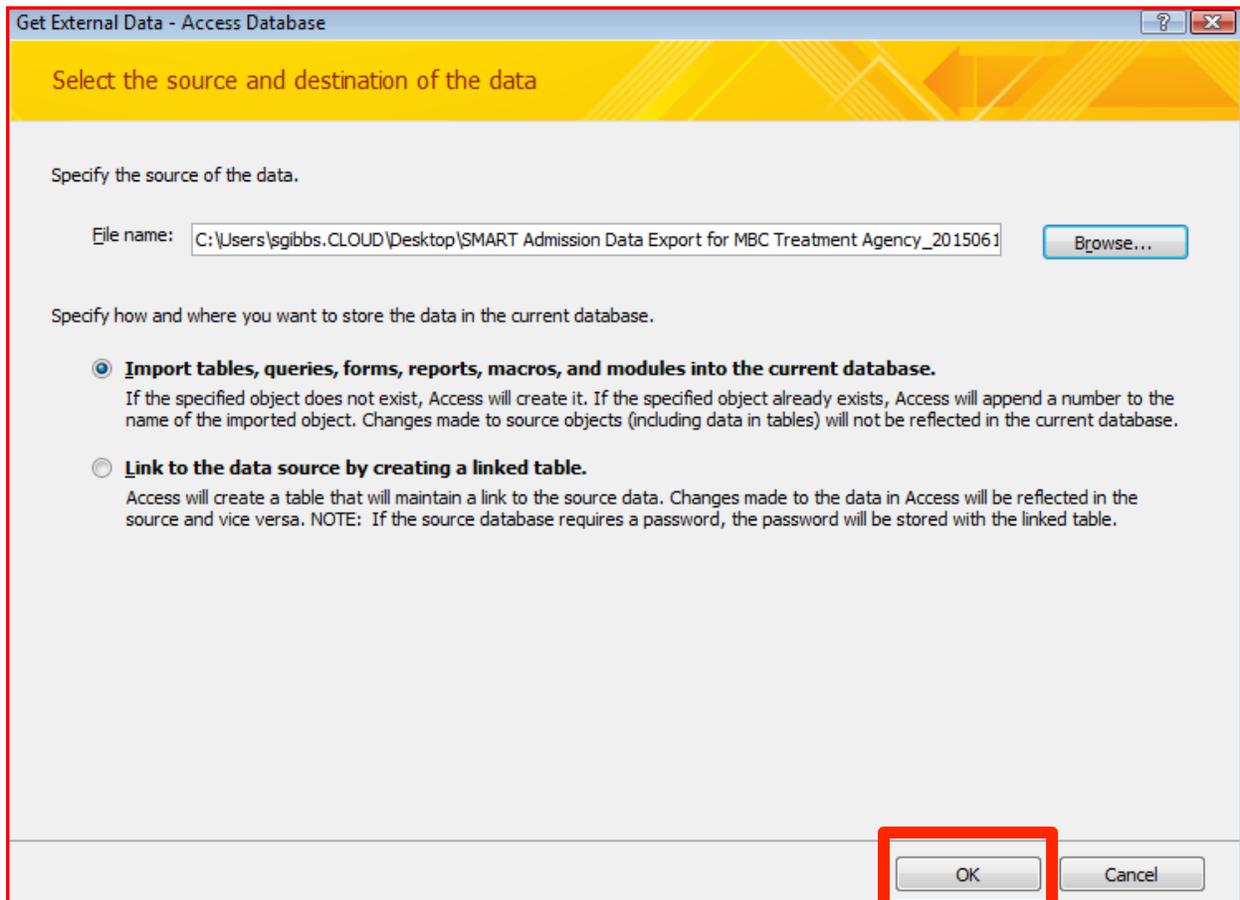
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8. Make 'First Row Contains Column Headings' is selected.
9. Click **Next**.

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10. Click **Next**.

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11. Confirm that 'Let Access add primary key.' Is selected.
12. Click **Next**.

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13. Click **Finish**.

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14. Click **Close**
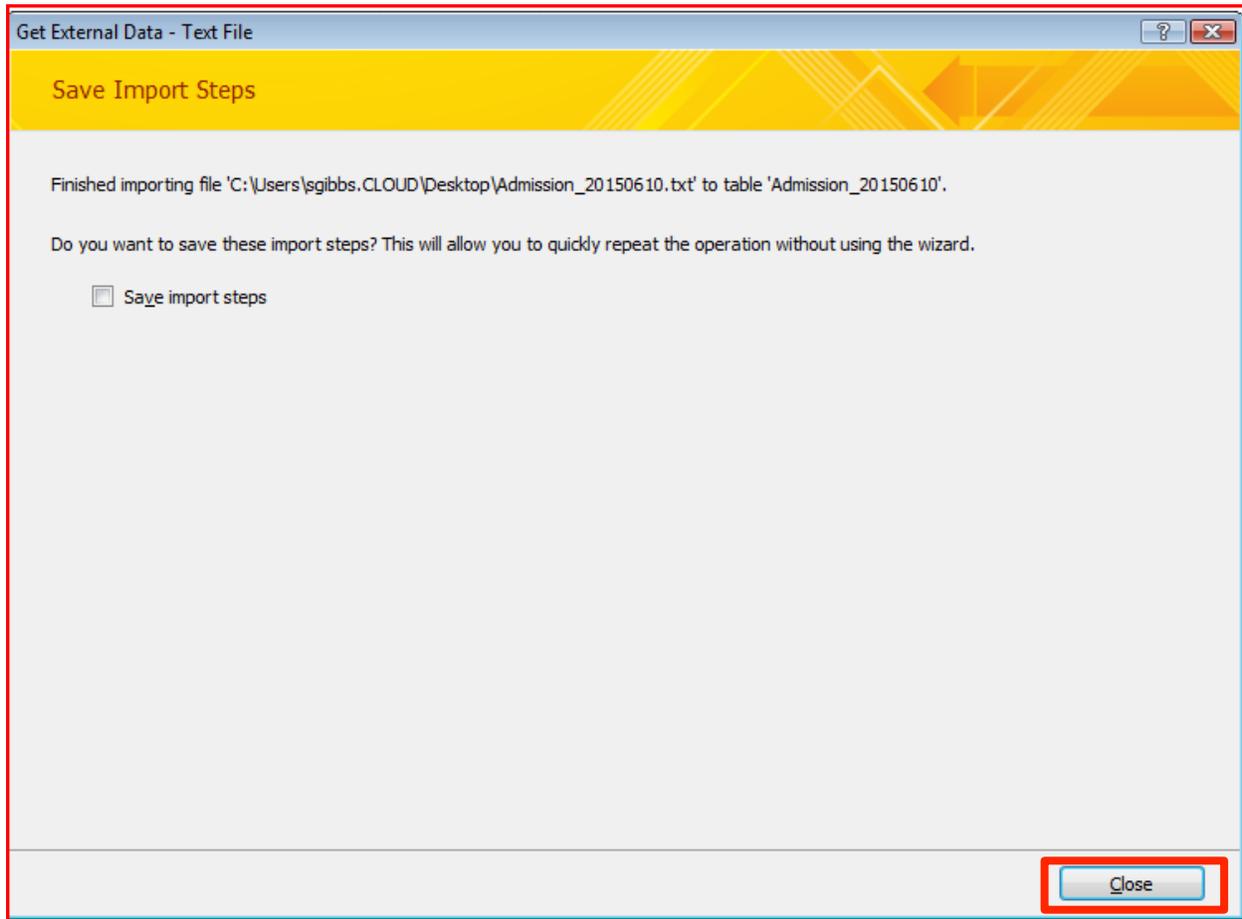
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Database6 : Database (Access 2007 - 2010) - Microsoft Access

ID	Admission_I	Agency_Nan	Client_ID	Unique_Clie	Client_Last_	Client_First_	Client_Full_	Birth_Date	Ethnicity_De	Gender_Des	Agency_ID	Client_Intak	Case_Numb	Intake_Date	Case_Status	County_Nan	Referral_Sor	Intake_At_U
1		MBC Treatmen	1135625	M0101763333R	Revere	Paul	Revere, Paul	1/1/1976	Not Hispanic	Male	700	1800992	1	9/29/2010	Open Active	Montgomery	Probation	Santa Ana
2		MBC Treatmen	1481794	M0131986516J	jesus	nathaniel	jesus, nathanie	1/31/1998	Puerto Rican	Male	700	2333456	1	1/23/2013	Open Active	Baltimore Cou	Drug Court	Costa Mesa
3		MBC Treatmen	1673052	M0504709763S	Smith	Frank	Smith, Frank	5/4/1970	Not Hispanic	Male	700	2632027	1	5/1/2014	Closed	Prince George'	Parole	Santa Ana
4		MBC Treatmen	1674577	M0604919875B	Bond	James	Bond, James	6/4/1991	Not Hispanic	Male	700	2634165	1	5/1/2014	Closed	Prince George'	Parole	Santa Ana
5		MBC Treatmen	1673152	M0509839587E	EA	SMART	EA, SMART	5/9/1983	Not Hispanic	Male	700	2632172	1	5/1/2014	Open Active	Prince George'	Parole	Santa Ana
6		MBC Treatmen	1683311	M0101804321N	mouse	Mickey	mouse, Mickey	1/1/1980	Not Hispanic	Male	700	2647162	1	6/1/2014	Closed	Montgomery	Drug Court	Santa Ana
7		MBC Treatmen	1821044	M0303864444M	Madness	March	Madness, Marc	3/3/1986	Not Hispanic	Male	700	2910329	1	3/1/2016	Open Active	Prince George'	Drug Court	Santa Ana
8	172348	MBC Treatmen	250982	M0601640987P	Pig	Porky	Pig, Porky	6/1/1964	Not Hispanic	Male	700	292379	1	8/15/2007	Open Active	Prince George'	Drug Court	Santa Ana
9	237296	MBC Treatmen	308509	F1010639999JO	Jones	Jennifer	Jones, Jennifer	10/10/1963		Female	700	365565	1	10/9/2007	Open Active	Montgomery	Alcohol and Dr	Santa Ana
10	237308	MBC Treatmen	308523	M1010689999JJ	James	Jessie	James, Jessie	10/10/1968	Not Hispanic	Male	700	365582	1	10/15/2007	Closed	Baltimore City	Alcohol/Drug A	Santa Ana
11	265820	MBC Treatmen	659705	F0601661966FL	Flintstone	Peebles	Flintstone, Pee	6/1/1966	Not Hispanic	Female	700	1082291	1	12/1/2007	Open Active	Prince George'	Alcohol/Drug A	Santa Ana
12	265862	MBC Treatmen	659871	M0707661966W	Wayne	Bruce	Wayne, Bruce	7/7/1966	Not Hispanic	Male	700	1082509	1	12/1/2007	Open Active	Prince George'	Alcohol/Drug A	Santa Ana
13	275487	MBC Treatmen	686932	M0702660943P	Parker	Peter	Parker, Peter	7/2/1966		Male	700	1122148	1	12/7/2007	Open Active	Montgomery	Other Health C	Santa Ana
14	267487	MBC Treatmen	664945	F0601667658TA	Taylor	Pilar	Taylor, Pilar	6/1/1966	Not Hispanic	Female	700	1090294	1	1/1/2008	Open Active	Montgomery	Drug Court	Santa Ana
15	263911	MBC Treatmen	605682	M0731802234P	Potter	Harry	Potter, Harry	7/31/1980	Not Hispanic	Male	700	990779	1	12/6/2007	Open Active	Anne Arundel	School	Santa Ana
16	275494	MBC Treatmen	686941	F0707673214JO	Joy	Frances	Joy, Frances	7/7/1967		Female	700	1122164	1	2/20/2008	Open Active	Howard	Drug Court	Santa Ana
17	275489	MBC Treatmen	686936	M0711763214C	Chan	Jackie	Chan, Jackie	7/11/1976		Male	700	1122154	1	2/20/2008	Open Active	Kent	Drug Court	Santa Ana
18	325077	MBC Treatmen	605721	F0305312762CL	Clinton	Hillary	Clinton, Hillary	3/5/1931	Not Hispanic	Female	700	990780	1	12/7/2007	Open Active	Washington, D	Drug Court	Santa Ana
19	411430	MBC Treatmen	937232	M0812549876N	Mouse	Mickey	Mouse, Mickey	8/12/1954	Not Hispanic	Male	700	1490719	1	10/9/2009	Open Active	Montgomery	Drug Court	Santa Ana
20	414211	MBC Treatmen	956445	F0221652345VA	Van Pelt	Lucy	Van Pelt, Lucy	2/21/1965	Not Hispanic	Female	700	1513819	1	10/16/2009	Open Active	Montgomery	Alcohol/Drug A	Santa Ana
21		MBC Treatmen	1047337	F0815568765TA	TAP	Susan	TAP, Susan	8/15/1956	Not Hispanic	Female	700	1656590	1	3/2/2010	Open Active	Montgomery	Drug Court	Santa Ana
22	467813	MBC Treatmen	888038	F0101306972AD	Adell	Adigun	Adell, Adigun	1/1/1969	Not Hispanic	Female	700	1425846	1	8/14/2009	Open Active	Montgomery	Juvenile Justic	Santa Ana
23	469547	MBC Treatmen	1047337	F0815568765TA	TAP	Susan	TAP, Susan	8/15/1956	Not Hispanic	Female	700	1656590	1	3/2/2010	Open Active	Montgomery	Drug Court	Santa Ana
24	473168	MBC Treatmen	938616	M0601871234P	pig	pork	pig, pork	6/1/1987	Puerto Rican	Male	700	1492394	1	10/13/2009	Open Active	Prince George'	Individual/Self	Santa Ana
25	517551	MBC Treatmen	923939	F0519558765TA	Tate	Louise	Tate, Louise	5/19/1955	Not Hispanic	Female	700	1472817	1	9/22/2009	Open Active	Prince George'	Drug Court	Santa Ana
26	495194	MBC Treatmen	1132940	F0711822341CA	Care	Continuing	Care, Continuin	7/11/1982	Not Hispanic	Female	700	1797136	1	8/15/2010	Open Active	Montgomery	Drug Court	Santa Ana
27	494311	MBC Treatmen	888226	F0101665199W	Wayward	Hua	Wayward, Hua	1/1/1966	Not Hispanic	Female	700	1426121	1	8/14/2009	Open Active	Montgomery	Juvenile Justic	Santa Ana
28	494332	MBC Treatmen	928226	F0214706789LI	Littletoes	Angela	Littletoes, Ang	2/14/1970	Not Hispanic	Female	700	1478495	1	9/25/2009	Open Active	Baltimore City	State Prison	Santa Ana
29	497583	MBC Treatmen	888170	F0101450945HA	Hawk	Kitty	Hawk, Kitty	1/1/1955	Not Hispanic	Female	700	1426050	1	8/14/2009	Open Active	Montgomery	Juvenile Justic	Santa Ana
30	502506	MBC Treatmen	1149548	F0815440987JO	Jones	Sue	Jones, Sue	8/15/1944	Not Hispanic	Female	700	1822686	1	11/2/2010	Closed	Prince George'	Drug Court	Santa Ana
31	519955	MBC Treatmen	923944	M0827878976N	McQueen	Lightning	McQueen, Ligh	8/27/1987	Not Hispanic	Male	700	1881973	1	2/13/2011	Open Active	Montgomery	Drug Court	Santa Ana
32	522271	MBC Treatmen	1194386	F0519765432CA	Cares	Denise	Cares, Denise	5/19/1976	Not Hispanic	Female	700	1889970	1	2/28/2011	Open Active	Prince George'	Drug Court	Santa Ana
33	562421	MBC Treatmen	1286538	M0823693214G	Group	User	Group, User	8/23/1969	Not Hispanic	Male	700	2035983	1	10/11/2011	Open Active	Prince George'	Drug Court	Santa Ana
34	586349	MBC Treatmen	1341255	M0222780987R	ROSC	Frank	ROSC, Frank	2/22/1978	Not Hispanic	Male	700	2120995	1	2/23/2012	Open Active	Prince George'	Drug Court	Santa Ana
35	626678	MBC Treatmen	1086979	M0904780987P	Pig	Pork	Pig, Pork	9/4/1978	Not Hispanic	Male	700	1718395	1	6/3/2010	Closed	Montgomery	Drug Court	Santa Ana
36	630876	MBC Treatmen	1287960	F0303659987CF	Crumb	Ava	Crumb, Ava	3/3/1965	Other Hispanic	Female	700	2038369	1	3/25/2010	Open Active	Pennsylvania	Parole	Santa Ana
37	631304	MBC Treatmen	929464	F0701872134TE	Test	Client	Test, Client	7/1/1987	Not Hispanic	Female	700	1480241	1	9/28/2009	Open Active	Garrett	Drug Court	Santa Ana
38	631220	MBC Treatmen	232992	F1102346678CL	Cline	Patsy	Cline, Patsy	11/2/1934	Not Hispanic	Female	700	271033	1	8/2/2007	Open Active	Baltimore City	Pre-Trial Servic	Santa Ana
39	636823	MBC Treatmen	1464090	F120382125lEI	Eight	Crazy	Eight, Crazy	12/3/1982	Not Hispanic	Female	700	2305903	1	11/1/2012	Open Active	Montgomery	Alcohol/Drug A	Santa Ana
40	636214	MBC Treatmen	891051	M0906846543D	Doo	Scooby	Doo, Scooby	9/6/1984	Not Hispanic	Male	700	1430283	1	8/21/2009	Open Active	Montgomery	Alcohol/Drug A	Santa Ana
41	652314	MBC Treatmen	1498811	F0303758765DE	Demonstration	Medicaid	Demonstration	3/3/1975	Not Hispanic	Female	700	2360280	1	3/4/2013	Open Active	Prince George'	Alcohol/Drug A	Santa Ana