

## General eXPRS Tips & Tricks

### Find a specific client profile:

You can find a specific client by using just their prime number. This tip is useful to take you directly to a specific client's profile, without having to search through a list of similar names.

- See the "[How To View Client Waiver/Service Eligibility Codes](#)" guide for instructions.

### Use Multiple Windows:

You can have multiple 'windows' open in eXPRS (IE6), or multiple tabs (IE7 or IE8) to prevent losing data you've entered by going forwards & backwards.

- To open a new window while keeping your current window open:
  - Right click on the menu item you want to open
  - Choose "**OPEN in NEW WINDOW**" or "**OPEN in NEW TAB**" from the menu
  - You can now toggle between these windows or tabs by using "**ALT**" and "**TAB**" keys.

### Use the eXPRS data someplace else:

1. eXPRS has had many search results pages updated so you can sort and/or export the results list directly from there to a program of your choice.

***Please note***, that if you use the export feature provided by eXPRS to move data to Excel, and you want to SUM a column of data, you'll have to do the following:

- highlight the data you want to sum
- click on the the small information box next to the highlighted data
- select "convert to number"

You should then be able to sum that data set you just highlighted.

2. If you have results that don't offer this option, or you don't want to use the export feature, you can still highlight & copy the results of a search, and then paste it into another software program such as Excel, so you can sum up totals, sort the information by client name, start date, etc.

- To copy/paste information:
  - Highlight the data you want to copy with the mouse/cursor
  - Select “**COPY**” from the menu
  - Go to the program you want to use (for example: Excel)
  - In that new program, select “**PASTE**” from the menu, and paste the information into the software program
  - Now you can manipulate the data as needed

**Print the screen you’re viewing:**

To get a “screen print”, or a printed picture of what you are viewing on your computer monitor:

- press the “**ALT**” key and “**PRINT SCREEN**” key; this will copy the screen image
- Go to the program you want to use (eg: a Word document or other software)
- Click “**PASTE**” to paste the image into the new document

OR

- Highlight the information with your mouse/cursor
- right click on the mouse
- choose “**PRINT SELECTION**”

**To find a name in a long list:**

If you’ve searched for something, and your search results have brought back a long list of names and you’re looking for a specific name in the list, instead of scrolling down the entire list, use these tips.

- After you’ve completed your search & the results have returned a list of names
  - press the “**Ctrl**” + “**F**” keys, and a “find” window will appear
  - enter the name you’re looking for & hit return
  - the screen will take you to that name in the list
  - press “**Ctrl**” + “**home**” to take you back to the top of the list, and then you can search again for another name

OR

- press the “**F3**” key above your numbers keys. This will also bring up the “find” window.

This tip is especially helpful when looking up a specific client in a list of CPAs or encounter reporting.

### Create a short cut to a specific eXPRS page

If you are using Internet Explorer 6 (IE6) or newer IE program, you can save a specific eXPRS page to the links bar for quick & easy access.

- Go to & open the page you want to have quick access to.
- From the IE menu bar, click **FAVORITES → ADD TO FAVORITES**
- In the small ADD TO FAVORITES window, name the page you are saving, and then select the LINKS folder from the “Create in:” drop down menu.
- Click **ADD**.

There should now be a labeled button for this page on your “**LINKS**” menu bar at the top of the browser page.