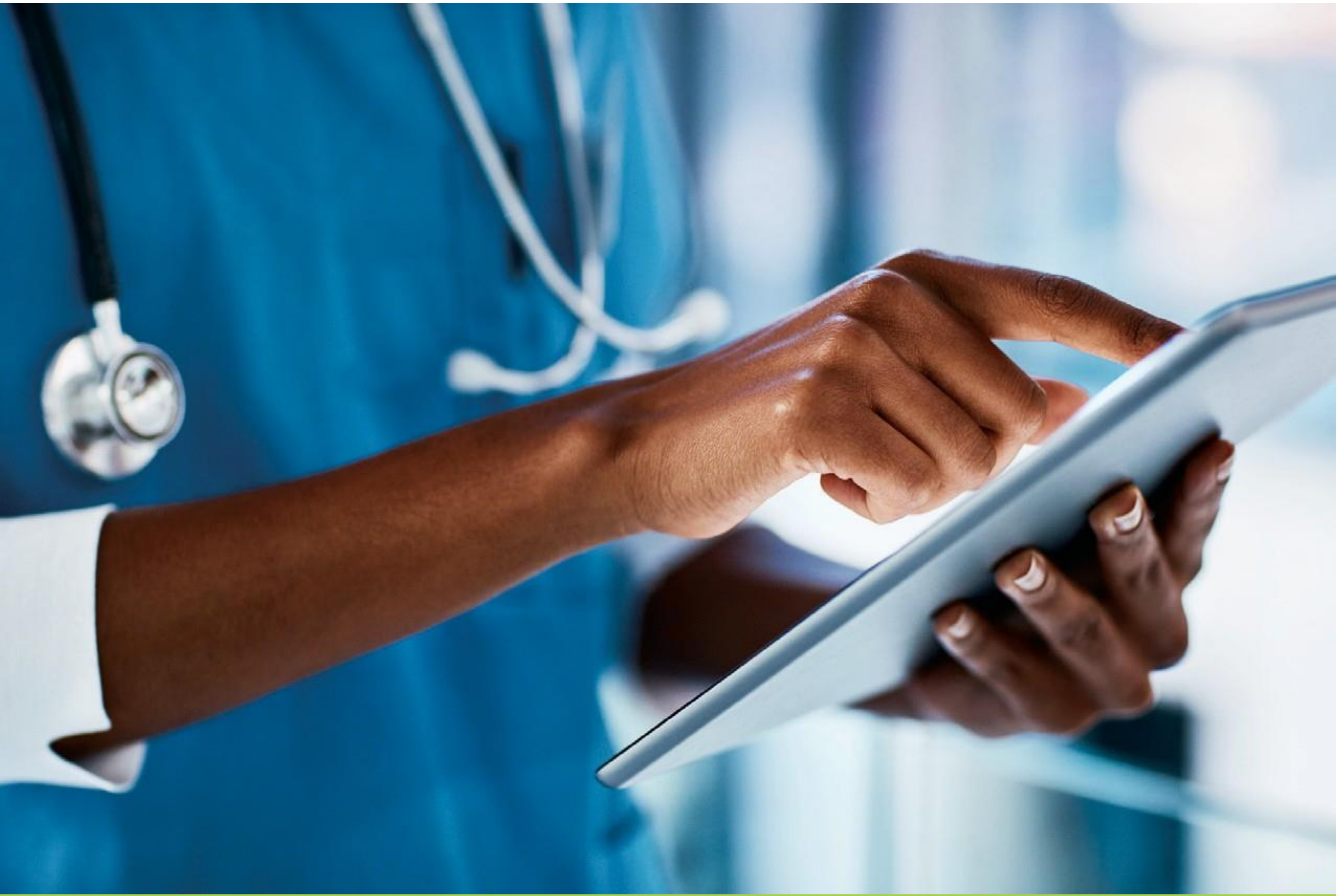
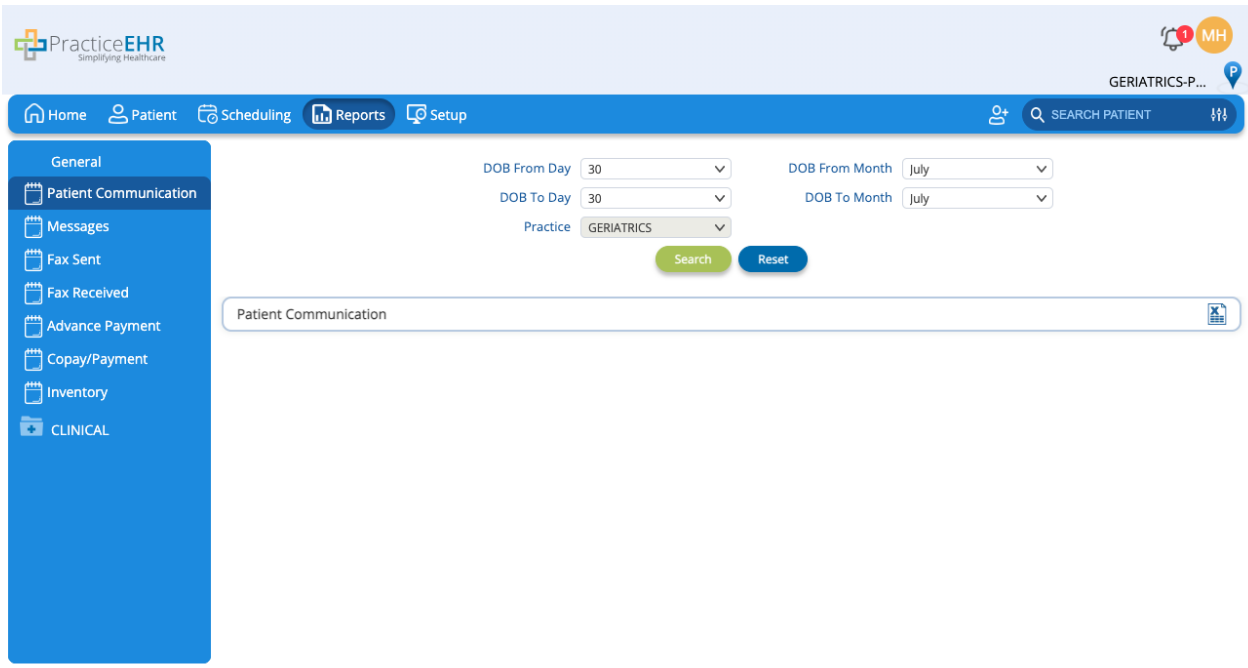


Practice EHR | User Guide

Reports Module | Part 1

Reports Module

The Reports module is an extensive library that tracks and stores all the data exported from or imported into Practice EHR. Specific reports can be generated using the Reports module.



There are two primary sections of the Reports module:

1. **General** - The General reports are most frequently run by the front-desk staff to manage daily tasks.
2. **Clinical** - The Clinical reports are run by the management team and can be used for various data mining and other practice management tasks.

Each section and the associated reports can be accessed from the left-hand menu. Additionally, the reports can be exported in Excel format, which allows the practice to manipulate the data per their needs.

1. General Reports

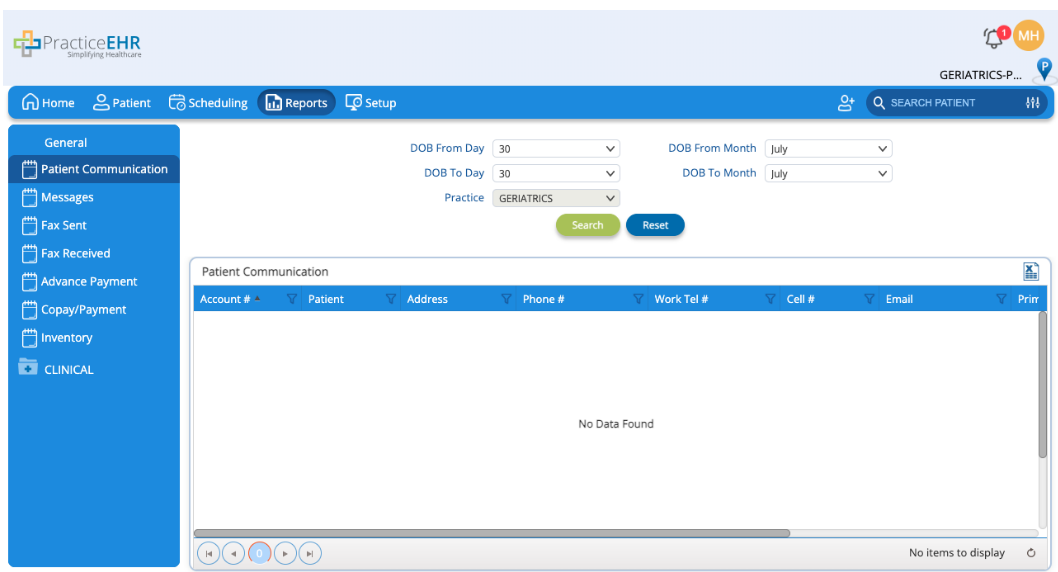
1.1. Patient Communication

The Patient Communication bucket of the General Reports section stores and displays information related to the patients registered with the practice.

- A user can use the search option to filter the search results based on the patient’s date of birth.
- Once the search is performed, a list of patients will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.

1.2. Messages

The Messages bucket of the General Reports section stores and displays information related to the messages sent and received within the system. A user can use this bucket to generate reports related to messages.

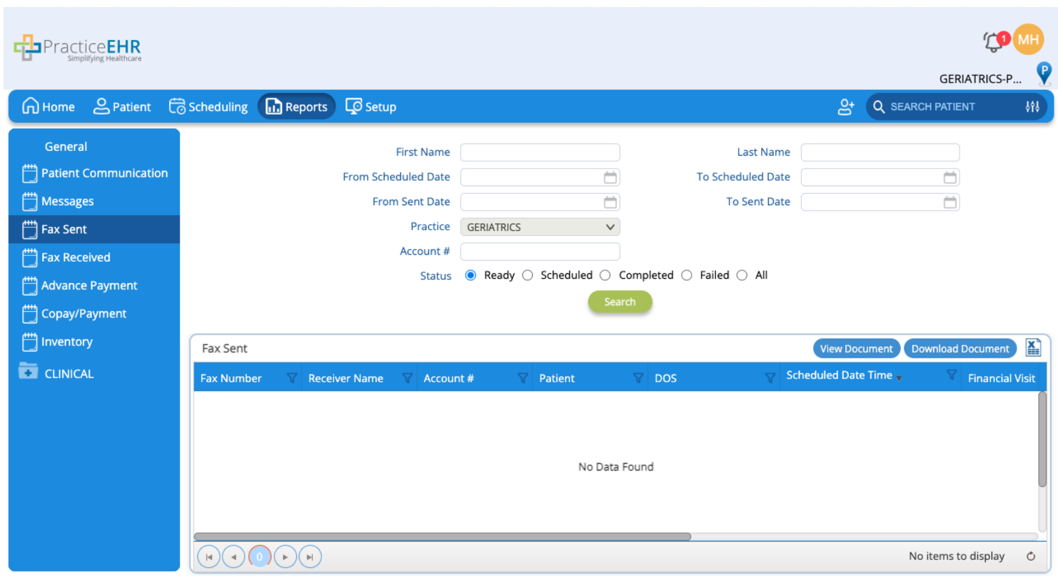


- A user can use the search option to filter the search results based on the user that generated the message, the message status (resolved/unresolved), the message type (financial/laboratory/medication, etc.), and even the message text.

- Once the search is performed, a list of messages will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.

1.3. Fax Sent

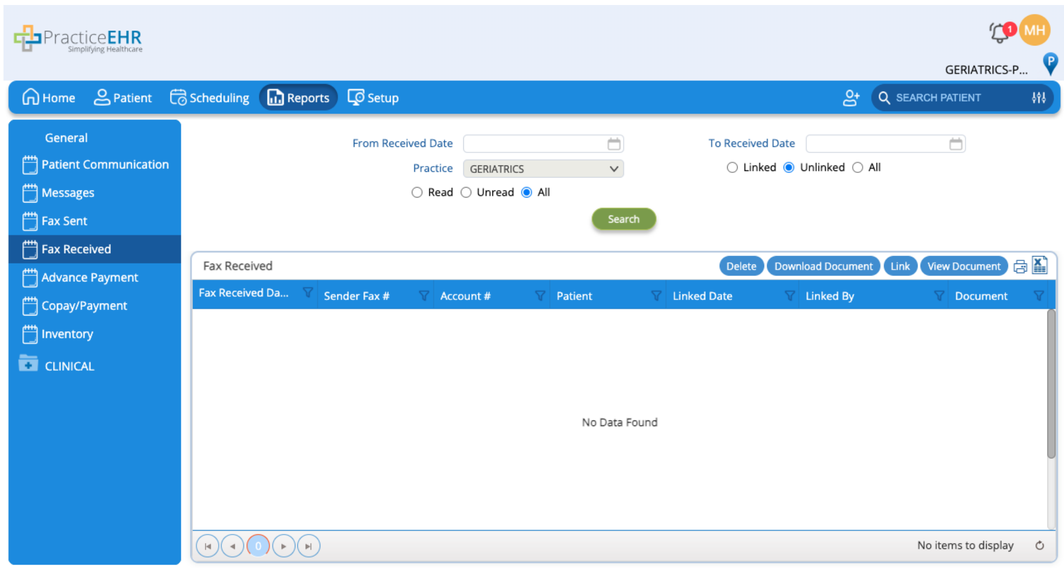
The Fax Sent bucket of the General Reports section stores and displays information related to the faxes sent through the patient's chart. A user can use this bucket to generate reports related to faxes sent.



- A user can use the search option to filter the search results based on the patient's first and last name, the scheduling date or sent date, the patient's account number, and the fax status (ready/scheduled/completed/failed/all).
- Once the search is performed, a list of sent faxes will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.
- The user can also **View** or **Download** the fax document.

1.4. Fax Received

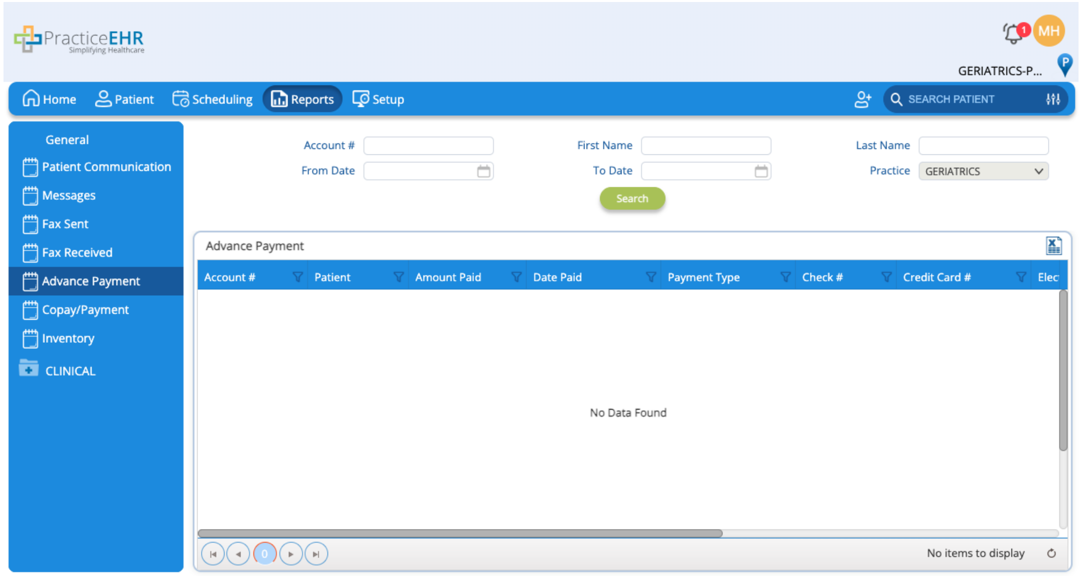
The Fax Received bucket of the General Reports section stores and displays information related to the faxes received in Practice EHR. A user can use this bucket to generate reports related to faxes received.



- A user can use the search option to filter the search results based on the date of receipt of the fax(es).
- Once the search is performed, a list of received faxes will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.
- The user can also **Delete** or **View** the fax document using the designated options. Moreover, a fax can be linked to a patient using the **Link** option.

1.5. Advance Payment

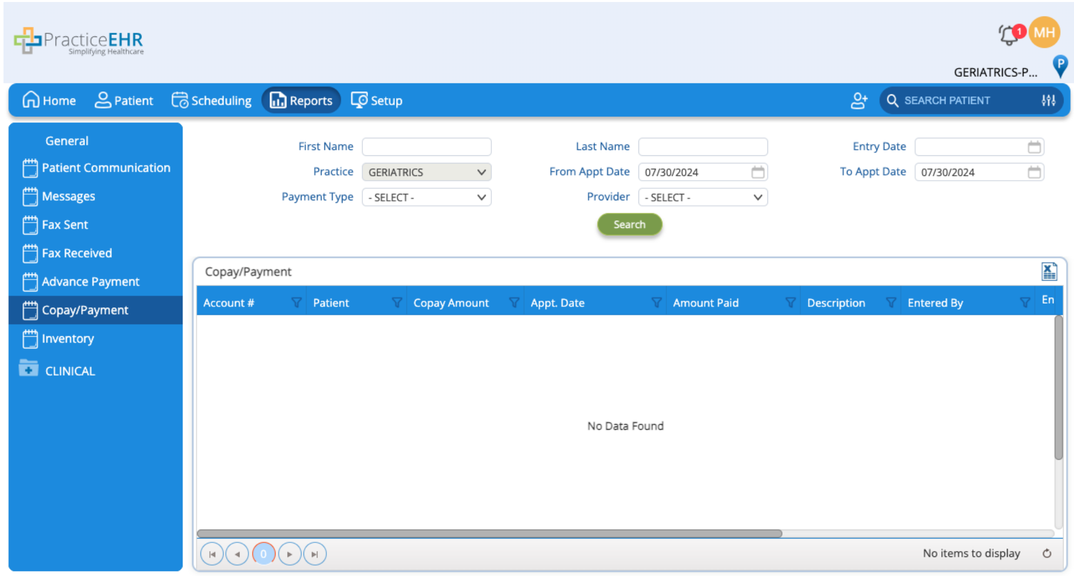
The Advance Payment bucket of the General Reports section stores and displays information related to the advance payments received from patients. A user can use this bucket to generate reports related to advance payments.



- A user can use the search option to filter the search results based on the patient's account number, first or last name, and date of receipt.
- Once the search is performed, information about the advance payments will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.

1.6. Copay/Payment

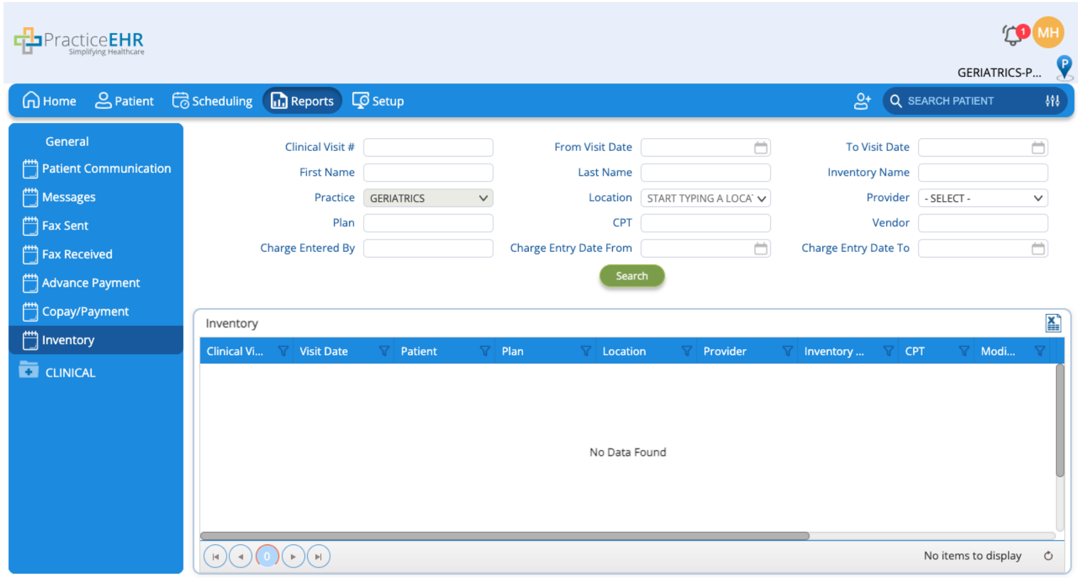
The Copay/Payment bucket of the General Reports section stores and displays information related to the copay and other payments received by the practice. A user can use this bucket to generate reports related to copay and payments.



- A user can use the search option to filter the search results based on the patient's first or last name, the appointment date, the entry date, the payment type (cash/credit card, etc.), and the provider.
- Once the search is performed, information about the copay and payments will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.

1.7. Inventory

The Inventory bucket of the General Reports section stores and displays information related to patient visits. A user can use this bucket to generate reports related to patient visits.



- A user can use the search option to filter the search results based on the patient's first or last name, the clinical visit number, the visit date, the inventory name, the practice's location, the provider, the plan, the CPT, the vendor, and the charge entry details.
- Once the search is performed, information about the inventory will appear, which can be exported in Excel format using the designated option at the top right corner of the search result section.

