

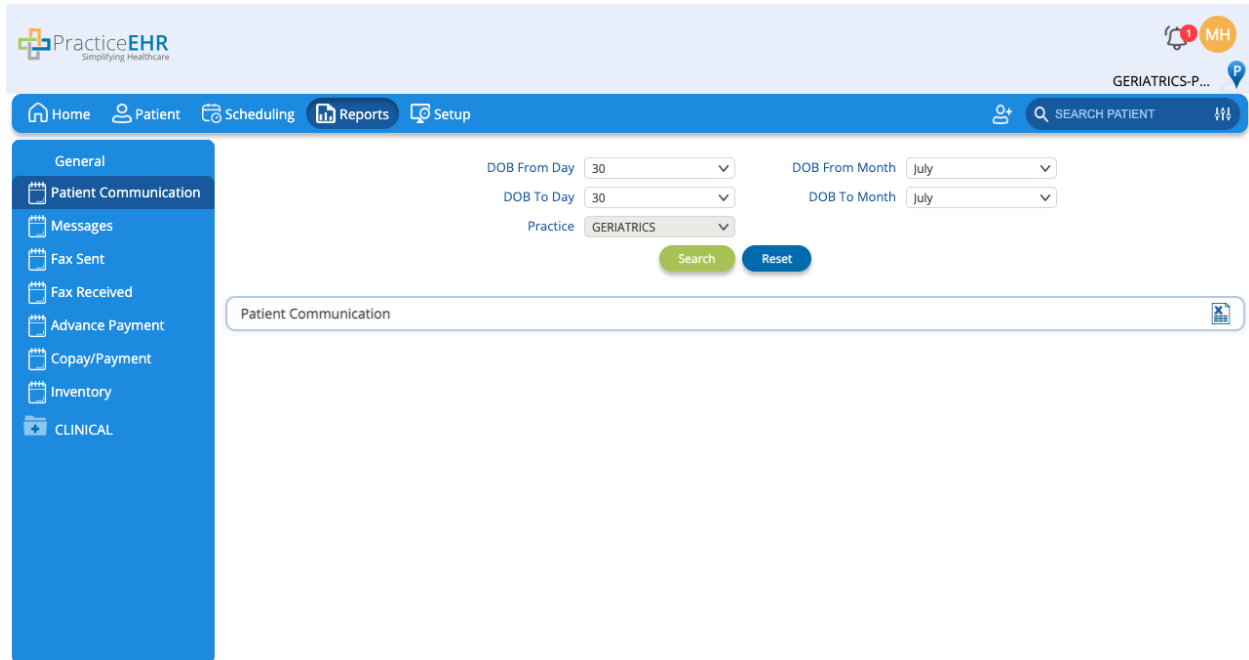
Practice EHR | User Guide

Reports Module | Part 2



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.



The screenshot shows the PracticeEHR interface for the Reports module. The top navigation bar includes Home, Patient, Scheduling, Reports, and Setup. A search bar for patients is also present. The left sidebar lists various report categories: General, Patient Communication, Messages, Fax Sent, Fax Received, Advance Payment, Copay/Payment, Inventory, and CLINICAL. The main content area displays filters for Patient Communication reports, including DOB From Day (30), DOB From Month (July), DOB To Day (30), DOB To Month (July), and Practice (GERIATRICS). Search and Reset buttons are available below the filters.

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.

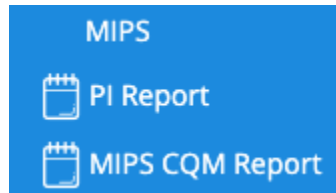


Each section and the associated reports can be accessed from the left-hand menu. Additionally, the reports can be exported in Excel format, which allows the practice to manipulate the data per their needs.

1. Clinical Reports

1.1. MIPS

The MIPS bucket of the Clinical Reports section can be used to generate and submit reports for MIPS reporting.



1.2. Immunization

The Immunization bucket of the Clinical Reports section stores and displays information related to patient immunization. A user can use this bucket to generate reports related to patient immunization.

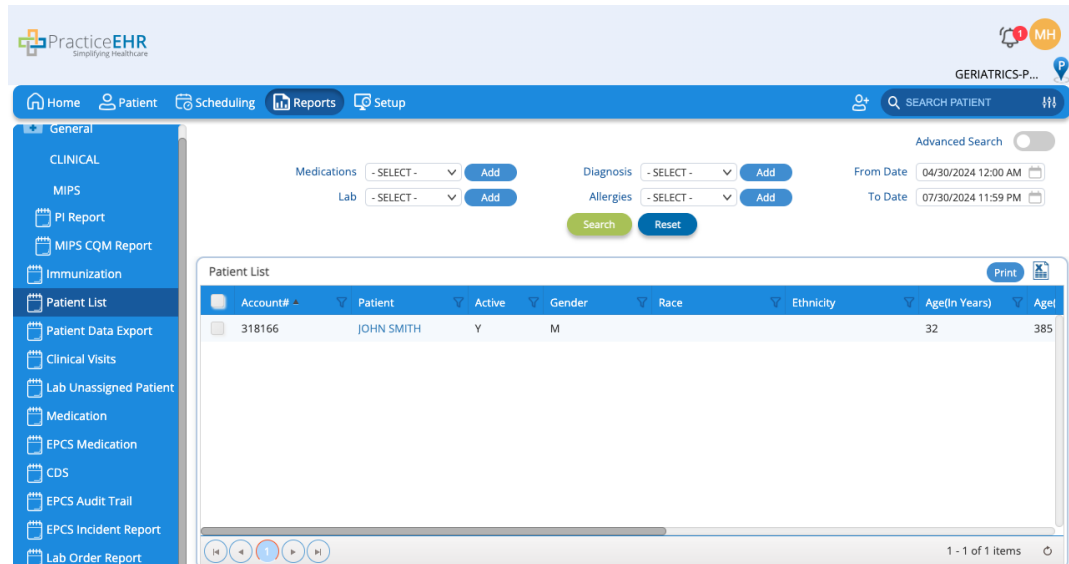
Provider	Account#	Patient	Immunization	Visit DOS	Route	Site	Lot #
DAVID NEWM...	298472	TEST PATIENT	HEP B ADULT #2	02/10/2015			
DAVID NEWM...	298472	TEST PATIENT	DTAP #1	02/10/2015			
DAVID NEWM...	298472	TEST PATIENT	GARDASIL #3	02/26/2015			
DAVID NEWM...	298472	TEST PATIENT	ZOSTAVAX	02/10/2015			
DAVID NEWM...	298472	TEST PATIENT	DTAP #2	02/26/2015			
	298472	TEST PATIENT	MENINGOCOCCAL ADULT	02/12/2015	CAUDAL BL...	Left Lower ...	
DAVID NEWM...	298472	TEST PATIENT	DTAP #1	02/17/2015			
DAVID NEWM...	298472	TEST PATIENT	DT	02/17/2015			2423



- A user can use the search option to filter the search results based on the patient's first or last name, account number, and immunization status (past/submitted/scheduled).
- Once the search is performed, immunization information 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. Patient List

The Patient List bucket of the Clinical Reports section stores and displays information related to the patients that are registered in Practice EHR. A user can use this bucket to generate reports related to the registered patients.



The screenshot displays the Practice EHR interface. The top navigation bar includes Home, Patient, Scheduling, Reports, and Setup. A search bar is located on the right. The left sidebar shows a menu with 'Patient List' highlighted. The main content area features search filters for Medications, Lab, Diagnosis, Allergies, From Date, and To Date. Below the filters is a 'Patient List' table with the following data:

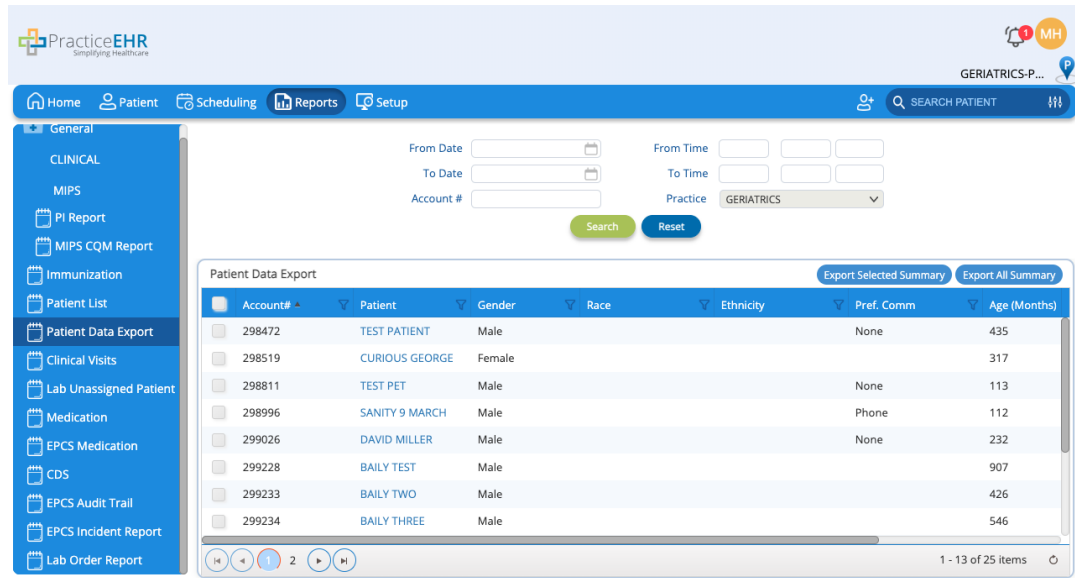
Account#	Patient	Active	Gender	Race	Ethnicity	Age(In Years)	Age
318166	JOHN SMITH	Y	M			32	385

- A user can use the search option to filter the search results based on the prescribed medications, diagnosis, labs, allergies, and registration date.
- Once the search is performed, a list of registered patients will appear, which can be exported in Excel format or printed using the designated options at the top right corner of the search result section.



1.4. Patient Data Export

The Patient Data Export bucket of the Clinical Reports section stores and displays information related to the patient's data. A user can use this bucket to generate summary reports related to a patient's data.



The screenshot displays the 'Patient Data Export' interface. At the top, there is a search filter section with the following fields: 'From Date', 'To Date', 'From Time', 'To Time', 'Account #', and 'Practice' (set to 'GERIATRICS'). There are 'Search' and 'Reset' buttons below these fields. The main area shows a table with the following data:

Account#	Patient	Gender	Race	Ethnicity	Pref. Comm	Age (Months)
298472	TEST PATIENT	Male			None	435
298519	CURIOUS GEORGE	Female				317
298811	TEST PET	Male			None	113
298996	SANITY 9 MARCH	Male			Phone	112
299026	DAVID MILLER	Male			None	232
299228	BAILY TEST	Male				907
299233	BAILY TWO	Male				426
299234	BAILY THREE	Male				546

At the top right of the table, there are buttons for 'Export Selected Summary' and 'Export All Summary'. The bottom of the table shows a pagination indicator: '1 - 13 of 25 Items'.

- A user can use the search option to filter the search results based on the patient's account number and date of data entry.
- Once the search is performed, information related to a patient's available data will appear, which can be exported as a summary using the designated options at the top right corner of the search result section.

1.5. Clinical Visits

The Clinical Visits bucket of the Clinical Reports section stores and displays information related to a patient's clinical visits. A user can use this bucket to generate reports on a patient's clinical visits.



The screenshot shows the PracticeEHR interface. On the left is a navigation menu with options like General, CLINICAL, MIPS, PI Report, MIPS CQM Report, Immunization, Patient List, Patient Data Export, Clinical Visits (highlighted), Lab Unassigned Patient, Medication, EPCS Medication, CDS, EPCS Audit Trail, EPCS Incident Report, and Lab Order Report. The main area has a search filter section with fields for Account #, Practice (set to GERIATRICS), Signed Off (Yes, No, All), From Date (07/30/2024), Provider, Status, To Date, Visit #, and Visit Type. A Search button is present. Below the filter is a 'Clinical Visits' table with columns: Visit #, Visit Date, Account #, Patient, Template, Type, and Provider. The table is empty, showing 'No Data Found'. At the bottom right of the table area, it says 'No items to display'.

- A user can use the search option to filter the search results based on the patient’s account number, the appointment date, the provider, the visit number, the visit status, and the visit type.
- Once the search is performed, information related to a patient’s clinical visits will appear, which can be exported in Excel format using the designated options at the top right corner of the search result section.

1.6. Lab Unassigned Patient

The Lab Unassigned Patient bucket of the Clinical Reports section stores and displays information related to the lab reports that have not been linked to any patient. A user can use this bucket to link the lab reports and generate reports on the unassigned labs.



- A user can use the search option to filter the search results based on the patient’s first or last name, the requested test, the entry date, the requisition number, and the provider’s first or last name.
- Once the search is performed, information related to unassigned labs will appear, which can be exported in Excel format using the designated options at the top right corner of the search result section.
- The user can also **Link Patient** to a lab result using the designated option.

1.7. Medication

The Medication bucket of the Clinical Reports section stores and displays information related to a patient’s medication history. A user can use this bucket to generate reports on the prescribed medications.



The screenshot shows the PracticeEHR interface for generating a Medication Report. The search filters include:

- First Name: []
- Last Name: []
- Date From: []
- Date To: []
- RX Status: -SELECT-
- Current meds: []
- Provider: -SELECT-
- Practice: GERIATRICS
- Drug Name: []
- Print Mode: -SELECT-

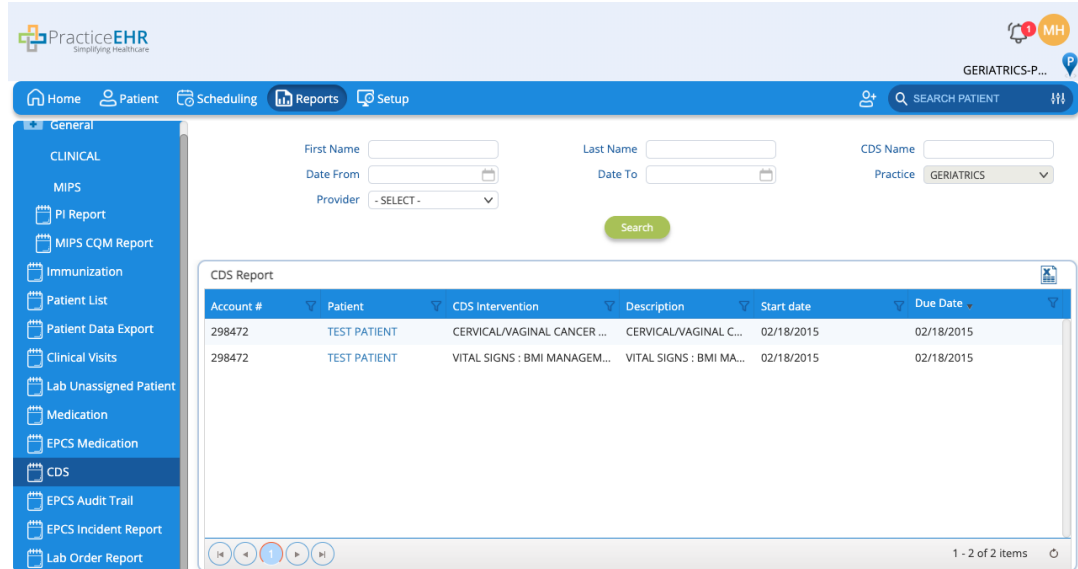
The Medication Report table contains the following data:

Rx #	Account #	Patient	Drug Name	Rx Status	Pharmacy	Start Date	End Date
1361959	298472	TEST PATIENT	Lasix 80mg Tablet	Prescribed		02/12/2015	
1365212	298472	TEST PATIENT	Abilify 10mg Tablet	Ordered		02/18/2015	
1368234	298472	TEST PATIENT	Augmentin 200mg Che...	Ordered		02/27/2015	
1368235	298472	TEST PATIENT	Pamelor 10mg/5ml Solu...	Prescribed		02/27/2015	
1370950	298996	SANITY 9 MARCH	Abilify 30mg Tablet	Ordered		03/09/2015	
1370952	298996	SANITY 9 MARCH	VESicare 10mg Tablet	Prescribed		03/09/2015	
1370955	298996	SANITY 9 MARCH	Benicar 5mg Tablet	Ordered		03/09/2015	
1370957	298996	SANITY 9 MARCH	Gabapentin 400mg Cap...	Ordered		03/09/2015	03/09/2015

- A user can use the search option to filter the search results based on the patient’s first or last name, the date of prescription, the drug name, the prescription status (Completed/Inactive, etc.), and the provider.
- Once the search is performed, information related to the prescribed medications will appear, which can be exported in Excel format using the designated options at the top right corner of the search result section.

1.8. CDS

The CDS bucket of the Clinical Reports section offers a valuable tool to enhance decision-making in the clinical workflow. A user can use this bucket to generate CDS reports.

The screenshot shows the PracticeEHR interface. The top navigation bar includes Home, Patient, Scheduling, Reports, and Setup. The Reports section is active, and a search filter is applied. The search criteria include First Name, Last Name, Date From, Date To, CDS Name (set to GERIATRICS), and Provider (-SELECT-). A Search button is visible. Below the search filter, a CDS Report table is displayed with the following data:

Account #	Patient	CDS Intervention	Description	Start date	Due Date
298472	TEST PATIENT	CERVICAL/VAGINAL CANCER ...	CERVICAL/VAGINAL C...	02/18/2015	02/18/2015
298472	TEST PATIENT	VITAL SIGNS : BMI MANAGEM...	VITAL SIGNS : BMI MA...	02/18/2015	02/18/2015

The table includes a search icon in the top right corner and a pagination indicator at the bottom right showing "1 - 2 of 2 items".

- A user can use the search option to filter the search results based on the patient's first or last name, the date of entry, the CDS name, and the provider.
- Once the search is performed, information related to CDS entries will appear, which can be viewed and exported in Excel format using the designated options at the top right corner of the search result section.