Creating Your Own Reports With the Smart Report Suite

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PCC 2017 Users' Conference

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Creating Your Own Reports with the Smart Report Suite

What is the difference between *‘srs’* and *‘srsgen’*?

- Use *‘srs’* to generate a report containing useful data
- Use *‘srsgen’* to alter the details appearing in a report

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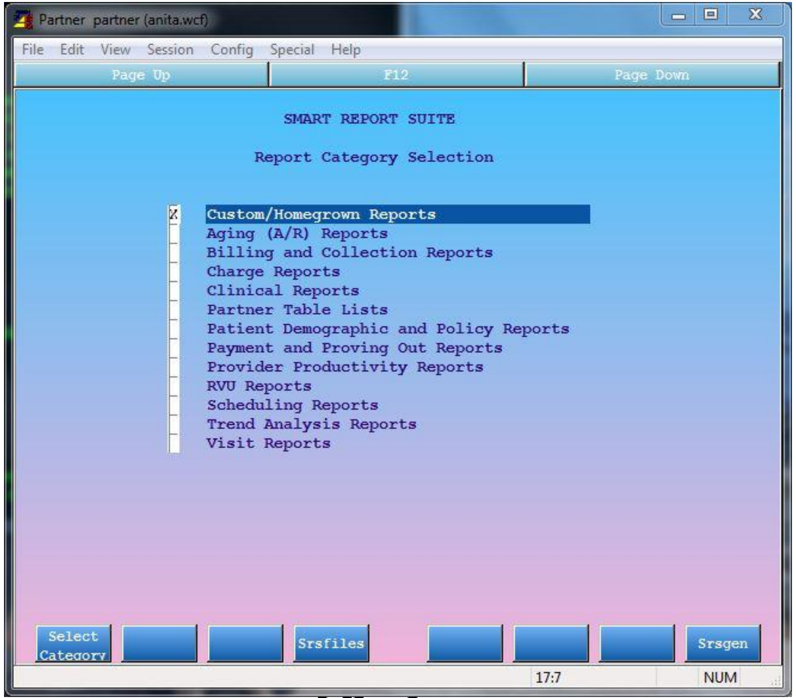
srs - Smart Report Suite

- Contains dozens of **standard** reports, grouped into various categories.

- Contains a special category for **Custom/Homegrown** reports.



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Let's view a sample 'srs' report:

- Start *'srs'*
- Select *"Scheduling Reports"*
- Select *"Appointments by Location, Date, and Provider ('pnpscan' style)"*

Let's customize this report to make it even more useful!
To do this, we need to run *'srsgen'* (F8)

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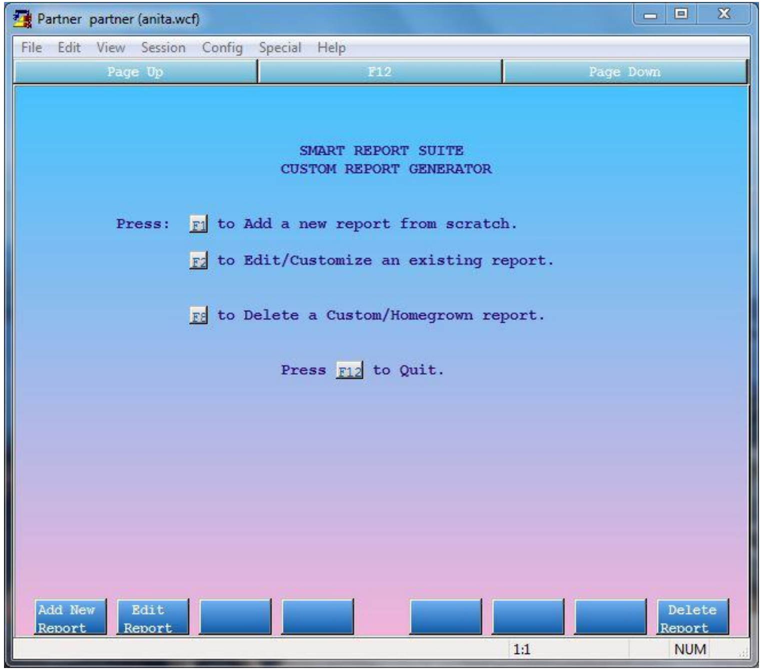

The *'srsgen'* main screen:

- F1 - **Add** new report
- F2 - **Edit** existing report
- F8 - **Delete** custom report

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Adding/Editing reports in *'srsgen'* involves three steps:

1. Select **Data Source** *(changing this is **un**common)*
2. Select **Columns** to display *(changing this is **very** common)*
3. Select **Sort/Subtotal** *(changing this is **somewhat** common)*

After customizing a report, *'srsgen'* will allow you to test your changes, and then save, tweak, or discard them.

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Let’s modify an existing report:

- To start, press <F2> to *“Edit/Customize Existing Report”*
- Select *“Scheduling Reports”*
- Select *“Appointments by Location, Date and Provider (‘pnpscan’ style)”*

1. Select Data Source
2. Select Columns to Appear
    - **Use F3 to Delete the *‘Magic Word’* column from the report**
3. Select Sort/Subtotal

… and test your changes!

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NO REPORT RESTRICTIONS ARE APPLIED DURING TESTS!

To test your report layout, *‘srsgen’* requires data, so no restrictions are applied at this point. Apply restrictions later through ‘srs’ when actually running the report!

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Do you want to save, tweak, or forget your changes?

When saving, you can either:

- Save as a new **Custom/Homegrown** report
- Replace an existing **Custom/Homegrown** report

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Let's modify this same report some more:

1. Select Data Source
2. Select Columns to Appear
   - **Use F2 to Insert the *'Home Phone Number'* column into the report**
   - **Use F2 to Insert the *'Personal Balance'* column into the report**
   - **Use F2 to Insert the *'Last Personal Payment'* column into the report**
3. Select Sort/Subtotal

… and test your changes!

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Now let’s modify a different report:

- To start, press <F2> to *“Edit/Customize Existing Report”*
- Select *“Payment Reports”*
- Select *“Payment Totals by User Who Posted, Check Number, and Insura”*

1. Select Data Source
2. Select Columns to Appear
3. Select Sort/Subtotal
    - **Sort by *“Payor Group”* and then by *“Check Number”***
    - **Subtotal for each *“Payor Group”* and for each *“Check Number”***

… and test your changes!

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Adding a New Report

- To start, press <F1> to *"Add a New Report from Scratch"*
  1. Select desired data source
     - **Use *'Patient Demographic and Policy Reports'***
  2. Select desired output columns
     - **Add useful fields like *'first name'*, *'last name'*, *'birthdate'*, *'phone #'*, etc**
  3. Select desired sort/subtotal options
     - **Choose how you would like the data sorted**
     - **You probably don't need subtotals for a demographic report like this**

Test the report, make further changes if necessary, and then save it!

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Deleting A Custom Report

- To start, press <F8> to *“Delete Report”*
- Select custom report of choice
- Press <F1> to delete selected report for all users
- Deleted reports are *not* recoverable!

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For more information on these and other PCC programs, check out:

http://learn.pcc.com