

DanG's Top Clinical Reports from the Report Library

1) Document Modification Report

A) What it does and where it looks

- i. Looks at attached documents only; unattached ones are ignored

B) Best Uses

- i. Locating misfiled documents
- ii. Evaluating what documents are in a category during re-organization efforts
- iii. Finding known documents across all patients

C) Tips + Tricks

- i. You can use the Search Filter once results are generated to quickly hone in on the specific document(s) you're looking for, even if you run the report w/ the formal filters wide open
- ii. The default sort is always the first column
- iii. The search works across all columns in the report, even those you hide.

2) Orders by Visit

A) What it does and where it looks

- i. Looks through all orders placed on the system
 - 1. Order Status filter is key to limiting the results, in the same manner as the filter of the same name in the Visit Tasks queue

B) Best Uses

- i. Referral tracking
- ii. Lab tracking

C) Tips + Tricks

- i. Use the search feature in the Orders filter to find all Referral or Lab orders at once, then use Select All
- ii. Consider saving customized versions of this report to have a Referral Tracking Report and a Lab Tracking Report to save time (8.1).
- iii. Click on an order and have it open! OK, not until the 8.3 release.



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3) Patient Immunization Administration Summary

A) What it does and where it looks

- i. Will look through all immunizations for patients, filtered down to just the ones selected, aggregate the dates, and display only patients with a total # of immunization dates for the selected immunizations that fall within the defined range
 - 1. As hinted, the Immunizations filter *must* be set appropriately, or the data will make little to no sense. In this sense, "appropriately" means selecting vaccines that are part of the same family, like the different varieties of HPV

B) Best Uses

- i. HPV study (Merck)

C) Tips + Tricks

- i. You don't have to select more than one vaccine, but you can – select all of the immunizations that make sense to be grouped together
- ii. 11y 0m is NOT the same as 11y as 11y means up to 12y.
- iii. Date of last visit may be changed in future releases to default to the last three years.

4) Portal Users by Appointment Date

A) What it does and where it looks

- i. Looks at patients with appointments and determines what portal accounts (if any) they are linked to

B) Best Uses

- i. Push to get patients signed up for the patient portal after an implementation
- ii. Ongoing portal participation and engagement during visits / checkin

5) Vaccine Inventory Reconciliation Worksheet

A) What it does and where it looks

- i. Looks through the vaccine inventory database to find the current inventory numbers for lots.
 - 1. The report will be presented with two blank columns; this is intentional

B) Best Uses

- i. Print out the report (VIA THE EXPORT TO PDF, THEN PRINT THE PDF METHOD) and carry it to fridge; use it to reconcile EHR inventory vs physical inventory
 - 1. Replaces Immunization Administration Count report (basically, though I guess the immcount report could still be used for... things?)

C) Tips + Tricks

- i. Limit the report to only Active and Reserved lots; Depleted lots aren't super useful unless you have a direct reason to check them
- ii. Make sure to limit by location when your inventories are separate



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6) Vaccine Inventory Transaction Log

A) What it does and where it looks

- i. Basically an audit log for vaccine inventory, it will look through the vaccine tables for all modifications to the specified lot's inventory
 - 1. This includes administrations, and manual adjustments. Cancelled/Refused/CI'd orders do not show up in this, because they did not affect the inventory and are not tracked in the database this is pulling from.

B) Best Uses

- i. Use this when trying to figure out where inventory discrepancies are coming from

C) Tips + Tricks

- i. This report will not work if a lot # is not chosen; it will return a blank report. Validation is not yet developed but is desired.

7) Visits by Billing Status

A) What it does and where it looks

- i. Looks through the EHR encounters to discover the billing status and whether or not charges have been posted

B) Best Uses

- i. Finding visits which have been billed, but have not had their charges posted
- ii. Finding visits which the clinicians have not billed

C) Tips + Tricks

- i. Setting the Billing Status and Posting Status filters are what make this report work
- ii. Utilize the Provider filter to keep an eye on clinicians who are more likely to fall behind on their billing.

