

# Advanced Reporting Workshop

## User's Conference 2023

Here are some of the things you'll do during this practice session:

- Connect to Practice Management Smart Report Suite (srs) and EHR Report Library on your own server
- Experience how to customize reports to meet your needs

*Connect to your PCC server and into a Practice Management window for exercises 1-2. Please see a PCC staff member if you need assistance with connecting to your server. You will use the Report Library for exercises 3-5.*

### **Exercise 1: create a payment-based srs report that subtotals by provider and procedure group**

- Bonus: Once the report is created, run the report showing year-to-date payments **restricted to include all procedure groups except for Immunizations and Injections.**

### **Exercise 2: create a visit-based report showing individual visits classified as “Misc” category**

- Since we want to see individual visits, be sure to specify **“Show Only Subtotal Lines = No”** when creating the custom report.
- Be sure to add the following restrictions when running the report:
  - Visit Category = “Misc Visit”
  - “Include only Revenue Charges”

### **Exercise 3: Create a recall list in Report Library identifying 11-12 year olds in need of HPV vaccine dose(s)**

- Use the “Immunization -> Overdue Vaccine Recall” report

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**Exercise 4: Create a recall list in the EHR Report Library identifying patients 12-18 years old who are overdue for a well visit or due within the next 90 days.**

- Be sure to **exclude** patients who:
  - Have a flag that would indicate the patient is inactive
  - Already have a well visit scheduled in the next year
- Save this as a customized report for future use. Remove criteria you don't need to filter on. Add or remove desired column output.

**Exercise 5 - Identify all referral orders that are not yet completed and need follow-up.**

- Use the “Orders by Visit” report in the “Clinical” menu.
- Select all types of “Referral” orders under the “Order Name” multi-select.
- Save this as a customized report for future use.
- Bonus: Schedule this report to run on the first of every month.