

# **OP Practice Portal - Reports QRG**

You can use the Reports functionality to enable the organization to run portal reports that provide an accurate accounting of specific portal activity from both the Patient and Practice Portals.

#### **Canned Reports**

### Navigating to Canned Reports

1. Navigate to Reports: **Navigation Panel > Reports > Canned Reports**.

The report list displays the report's **Name** and **Description**, and there is a **Run Report** button. The date that the list was last updated is displayed on the top right.

## **Running a Report**

Click the **Run Report** button to the right of your desired report's description. Below is a list of reports that can be run by a practice.

- Account Registration Lists: Provides a list of Accounts (both Registered and Self-Registered Users) with login activity in the Portal.
  - 1. Enter the **Date Parameters** for the report in the **Reporting Period** fields.
  - 2. Click the View Report button.
  - 3. Select a **Report Format** (optional) from the **Export** drop-down:
    - PDF
    - Word
    - Excel
- Patient Messages: Provides a list of messages sent from the patient portal.

**Note**: All messages will be managed in OP. The report can be used by a practice to confirm receipt of messages in OP.

- 1. Enter the **Date Parameters** for the report in the **Reporting Period** fields.
- 2. Click the View Report button.
- 3. Select a **Report Format** (optional) from the **Export** drop-down:
  - PDF
  - Word
  - Excel
- Patient Summary: Displays information about the patients in the patient portal.
  - 1. Enter the **Date Parameters** for the report in the **Reporting Period** fields.
  - 2. Click the **Process Report** button. The Report Details window is displayed. Review the information.
  - 3. Click the **Process Report** button. A notification the report was submitted for processing is displayed. **Note**: The Receive notification when complete checkbox is not applicable.
  - 4. Click the **Processing Report** tab to view the report's status.





/ Canned Reports Report	List Processing Report Par	tient Summary 🕄			
Processing Reports Below are the reports still processing.					
PROCESSING REPORTS	REPORT TYPE	PROCESS DATE		STATUS	NOTIFY i
08/01/2019 to 08/20/2019	Patient Summa	ary 08/28/2019 11:46:37 AM		Processing	
<ul><li>&lt; 1 &gt;</li></ul>					Showing 1 to 1 of 1 entries Show 10 • entries
Below are the reports that have completed.					
COMPLETED REPORTS					
REPORT NAME	REPORT TYPE		COMPLETED DATE	STATUS	
08/01/2019 to 08/27/2019	Patient Summary		08/28/2019 11:38:00 AM	Completed	

- 5. Click the **Date** in the Report Name column to open the report.
- 6. Select a **Report Format** (optional) from the **Export** drop-down:
  - PDF
  - Word
  - Excel

#### **Exporting a Report**

- 1. Select a **Report Format** (optional) from the **Export** drop-down:
  - PDF
  - Word
  - Excel
- 2. Click the File that is displayed at the bottom of the browser window to view, save, or edit.

