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.

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.