

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Standard and Custom Patient Forms/Reports

Last Modified on 06/26/2020 2:16 pm EDT

Version 20.4

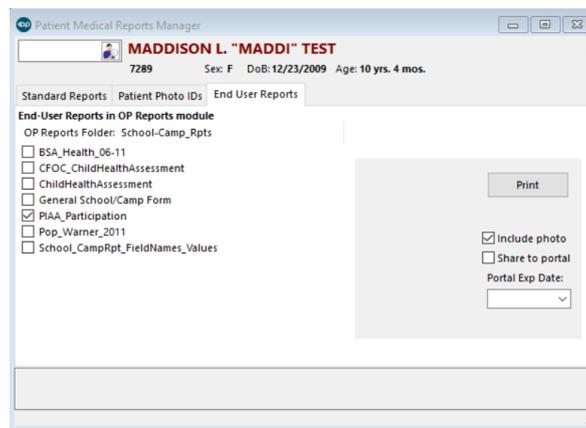
Path: Clinical tab > School/Camp Reports button

Overview

Standard patient-specific forms, such as Demographic print-outs, Immunization records or generic School/Camp reports, are available to be printed from OP or sent to the patient's portal account. Additionally, custom patient-specific forms can also be printed or sent to the portal once they have been added to OP.

Print a Standard or Custom End User Report

1. Navigate to **Patient Medical Records Manager** by following the path above.
2. Search for and select the patient.
3. Click the **Standard Reports** tab or the **End User Reports** tab, depending upon what form you want to print.
4. Select the checkbox for the report to run.



The screenshot shows the 'Patient Medical Reports Manager' window for patient MADDISON L. 'MADDI' TEST. The patient's information includes ID 7289, Sex: F, DoB: 12/23/2009, and Age: 10 yrs. 4 mos. The 'End User Reports' tab is active, showing a list of reports under the folder 'School-Camp_Rpts'. The reports listed are: BSA_Health_06-11, CFOC_ChildHealthAssessment, ChildHealthAssessment, General School/Camp Form, PIAA_Participation (checked), Pop_Warner_2011, and School_CampRpt_FieldNames_Values. A 'Print' button is visible, along with checkboxes for 'Include photo' and 'Share to portal', and a 'Portal Exp Date' field with a dropdown menu.

5. Click the **Print** button and select a printer. The **Medical Record Disclosure Tracking** window is displayed
6. Complete the information, and click **OK**.

Send a Standard or Custom End User Report to the Patient Portal

1. Navigate to **Patient Medical Records Manager** by following the path above.
2. Search for and select the patient.
3. Click the **Standard Reports** tab or the **End User Reports** tab, depending upon what form you want to send to the portal.
4. Select the checkbox for the report to run.
5. Click the **Share to portal** checkbox.
6. Click the drop-down and select from the calendar or enter an expiration date in the **Portal Exp Date** field.



Note: The Portal Exp Date field will populate with the Default Document Expiration Date set in the Portal tab of System Preferences.

7. Click the **Print** button to send the report to the portal. If you do not need to print the report, close the print window.

Version 20.3

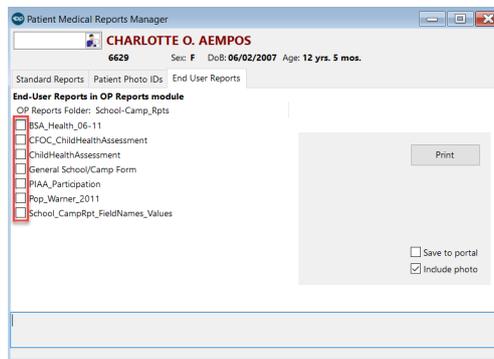
Path: Clinical tab > School/Camp Forms button > End User Reports tab

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4. Select the checkbox for the report to run.



5. Click the **Print** button.
6. Complete the information, and click **OK**.