

Reports FAQs

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How do I put in a request for a customized report?

Please have the report name, patient examples for the report data, and the desired modifications available. Be specific about the data to be added. If possible, note the location in OP where this data can be found. If you are simply looking for modifications to an existing OP Report (or something close to an existing report) there will most likely not be a charge for this.

If the report is based on a form (e.g. a state form), we would need a copy of that form. We request that the report be as clear as possible. If you have a PDF or Word document on which that form is based, please send that document to us. Also, send a second copy of the form with example information filled in exactly where you would like that information entered. Finally, submit an OP Report that is close to the desired report.

If this is a brand-new custom report, we need as much descriptive detail on the report that you can provide in order to determine the amount of work and cost to produce it. Please mark the report with the following information (or any other notable particulars):

- Criteria: This is the information would that you like to select each time you run the report (e.g. service date range, provider, patient ID)
 - Date should be the date of service.
 - Provider should be the PCP (not the Rendering provider)
- The data columns that should be included (e.g. patient first name, patient last name, DOB, etc)
- The summary lines that should be included (e.g. count of patients summarized by provider, count of CPT codes per week)
- Header and footer information (e.g. practice name in header, date and page number in the footer)
- A mock up of the report.

If you would like a customized report, please contact our support team with the specific details of the desired report.

Support Email: support@officepracticum.com

Support Phone: 800-218-9916 x 2

Which report shows what vaccines were given to VFC patients for a specific date range?

Which report contains patient's names and addresses?

1. Open **OP Reports**.
2. Once you have logged in, open the **Administration** folder, then open the **Patient Register Lists** folder.
3. Double-click the **Patient Directory** report.
 - You have the option of specifying the current status of the patient. It defaults to include only 'Active' patients. Change the text to select a different status, or select 'Show All Values' to include all patients in the database.

4. Click **OK** to run the report.

Which report prints out all of my self-pay patients?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then the **Patient Register Lists** folder.
3. Double-click the **Patients Per InsCarrier Detailed** report.
4. In the search criteria, click the **Ins Carrier Code** drop down arrow, find Self-Pay, and click the **Add to List** button.
5. Click **OK** to run the report.

Which report prints out of all my no show patients?

To see all no-showed appointments during a given date range:

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then the **Schedule** folder.
3. Double-click the **No Show Appointments** report.
4. Select the date range for No Shows. (To see no shows for all dates, set the first date value back to a date before your practice started using Office Practicum.)
5. Click **OK** to run the report.

Alternatively, you can use the SQL report **No Show Details** to show no-showed appointments, along with confirmation status and confirmation date, location, appointment date, chart number, and type of visit.

Which report calculates the amount of time between patient check-in and check-out?

1. Open **OP Reports**, and log in.
2. Open the **Administration** Folder, then open the **Schedule** folder.
3. Double-click the **Time Spent in Office** report.
 - a. The Time Spent in Office report displays an average elapsed time for each provider by day.
 - b. The Time Spent in Office Details report also displays the elapsed time for each patient.
4. Set a date range on the Auto-Search pop-up.
5. Click **OK** to run.

Which report generates return address labels?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then open the **Labels** folder.
3. Right click **Custom Address Label Sheet**, and select **Design**.
4. Follow the instructions included on the report to change the text of the return address label.
5. Save and close the report.
6. Double-click to run the report. A full sheet of return address labels will generate.

Which report prints patient address labels for mass mailing?

1. Open **OP Reports**, and log in.

2. Open the **Administration** Folder, then open the **Labels** folder.
3. Select an appropriate label report.
 - a. The **Family Address** reports generate one address label per family (based on home phone number). **ChildLastName** sets the addressee to the last name of the child. **GuarantorLastName** sets the addressee to the last name of the primary contact.
 - b. **Patient Address by Birth Month** will generate one address label for each patient with a birthday in the specified month. The Birth Month search field should be entered as a number.

Which report shows the total number of patients in my practice?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then open the **Patient Register Lists** folder.
 - a. The last page of the **Patient Directory** report will show a count of all patients.
 - b. The **Patients by VFC Summary** report will show a count of patients per VFC status.
 - c. The **Patients Per InsCarrier Summary** report will show a count of patients per insurance carrier.
 - d. In the **Additional Reports** sub-folder, the **Patient Directory by Provider** report shows a count of patients for each provider following the list of patients for that provider.

Which report shows all appointment types for a provider for specific dates?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then the **Schedule** folder.
3. Double click the **Appts by Provider** report.
4. Set the date range, and click **OK**.
 - This report prints a count of each appointment type for each provider within the date range.

Which report calculates revenue for a certain provider in a certain date range?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, the **Accounting** folder, then open the **Revenue** folder.
3. Double-click the desired provider accounting summary report.
 - **Billing Provider Accounting Summary** shows the totals for each billing provider.
 - **Rend Provider Accounting Summary** shows the totals for each rendering provider.
 - **Service Provider Accounting Summary** shows the totals for each service provider.
4. Set the desired search criteria and click **OK**.

Which report shows all changes made in the system by an employee?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then the **System Administration** folder.
3. Double-click the **Audit Trail** report.
4. Set the desired search criteria.
 - 'Tablename' refers to the database table. This should be checked to **show all values**.

Which report shows the number of children vaccinated in addition to number of shots given?

1. Go to **Reports > Grid Analysis of Immunization Records**.
2. Enter the vaccination date range.
3. Choose which lots: VFC, Non-VFC, or All lot numbers to view.
4. You can sort and view by dragging columns to top of grid, i.e., Patient Name, Lot # etc.
5. Columns can be added or removed from view by selecting the grid line icon the the far left of the columns an checking or unchecking the appropriate boxes.
6. The report will show you the vaccines listed by patient and then which vaccines each child was given.

Which report calculates all charges by provider or insurance carrier?

1. Go to **Reports > Billing Transaction Analysis**.
2. Add the **Ins. Carrier** column to view, and drag it to the gray area.
3. Click the filter icon in the top of the **Ins. Carrier** header and check the insurances you would like to see (or **ALL** if you want to see totals from all carriers).
4. Set your date range and make a reference date selection.
5. Click **Refresh Grid**.
6. This report will show all charges (both patient and insurance), payments and adjustments.
7. To search by **Provider** instead of insurance carrier, perform the same steps above except drag the **Rendering/ Billing/ Service or Supervising Provider** column into the gray space.

Which report shows how much patients have paid out of pocket in one year?

1. Open **OP Reports**, and log in.
2. Open the **Administration** folder, then the **Accounting** folder and choose the **Patient Accounts** folder.
3. Double-click the **Total Patient Payments** report.
4. On the first tab, type the patient number, or the home phone number to find total payments for a family.
5. Set the date range on the **Current_Transactions**, **Patient_Credit_Account**, and **Archive_Transactions** tabs then click **OK**.
6. The report will generate a list of all monies a patient has paid to the practice within the specified date range. The deposit source column will describe the method of payment.

Which report generates a facility activity report?

1. Go to **Reports > Billing Transaction Analysis**.
2. Enter the date range and reference date type you would like to use.
3. Add the **LINE32 Other Facility ID** column to view, and drag it to the gray area.
4. For a facility report, check mark the box for **LINE32 Other Facility ID**. This will allow a facility column to appear in your report.

Which report generates a patient recall list for a preventive exam?

1. Go to **Reports > Demographic Analysis/Recall**
2. Enter visit dates. Check **Active patients only** and **Show future appts** or **Exclude patients with appts**, if desired.
3. Click the **Search** button to generate the list.
4. Click the **Care Plan Recall** tab.
5. Select **Preventive Encounter** from the **Recall item** drop down list.

6. Click the **Search** button to generate the list.
7. Click **Export XLS** to save the list to an excel spreadsheet, **Print Letters** to print recall letters and address labels for the patients, or **Print Grid** to print the table.

Which report generates a list of patients with a specific diagnosis?

A list of patients with a DXCode in the 'DX 1' position can be generated using the report on the Reports menu. However, a comprehensive DXCode report is available in OP Reports.

1. Navigate and log into **OP Reports: Tools > OP Reports**
2. Open the **Administration** folder, then the **Medical** subfolder.
3. Double-click **PatientsWithDXCode** report.
4. In the **DX** tab, enter the diagnosis code you are searching for.
5. In the **Physical** tab, enter the date range you would like to search, and click **OK**.



Note: Because of the way the data is generated, there is a possibility that a patient may be displayed on the list more than once. The DX Code Duplicate denotes that a patient has been listed previously in the specific DX Code group. Report Duplicate denotes that a patient has been listed previously somewhere on the report. Despite the duplicate listings, the patient counts are accurate.

Why am I unable to see payment data when I sort the Billing Transaction Analysis by CPT code?

CPT codes 1 and 2 are used to represent payments. When sorting by CPT, the payment codes are excluded and those columns will be blank. If you would like to sort by CPT code the Reimbursement Analysis report would work better.

Claim#	CPT	Charge	Patient Owed	Payment	Patient Paid
Claim# : 125724 (COUNT=3, , , , ,)					
	99393	120.00	0.00	0.00	0.00
	1	0.00	0.00	75.00	0.00
	99213	85.00	0.00	0.00	0.00
		205.00	.00	75.00	.00

CPT	Claim#	Charge	Patient Owed	Payment	Patient Paid
CPT : 99393 (COUNT=1, , , , ,)					
	125724	120.00	0.00	0.00	0.00
		120.00	.00	.00	.00

Why is the patient demographic information blank when I try to print a school form?

The patient **MUST** have a Well Exam note entered into the system in order for the patient demographic information to pull onto the form. All School/Camp forms were built from the physical table in OP Reports designer. Once the patient has a Well Exam

entered, even if it is simply an interval history, then all information will be carried over properly.

Why are some immunizations missing from a school form?

The school forms have limited fields. For example, if all MMR's are given as separate components they may not all fit on the report.

To print the complete vaccine record for the patient:

1. Go to [F8] **Patient Chart**.
2. Click on the **Immunizations** tab.
3. Click on the **Complete List** tab.
4. Use the enable column to the left of the column header to disable any missing columns or remove any columns that are not needed.
5. Click the printer icon to print the report and attach to the school form.

Why can't I print my new report in Office Practicum?

If you've downloaded your new Report but are unable to print it from where you expect in Office Practicum, it is most likely saved in the wrong folder in OP Reports. To resolve this problem, you can simply move the folder to the correct place in OP Reports.

1. Open **OP Reports**, and log in.
2. Locate the report you just installed. (If it didn't install to the right folder, it is most likely in the main 'All Folders' folder.)
3. Drag and drop it to the appropriate folder.
4. See [Running OP Reports](#) from Office Practicum for a list of the OP Report folders that correspond with different areas in Office Practicum.

Why are the current weights and heights not printing on school forms?

If there is a discrepancy with the heights and weights printing on the school forms, review the vital signs entries again:

1. Open the [F8] **Patient Chart**.
2. Click the **Vitals/Growth** tab, then click the **Growth Measurements** tab.
3. Click **Recalculate All** button.

How do I save the Demographic Analysis and Recall report in Excel format?

1. Click the **Export** button after generating the recall list.
2. Browse to the location you would like to save the list.
3. Set the **Save As Type** to the desired format (xls or cvs).
4. Set the file name, then click the **Save** button.

Why don't my reports show all revenue billed?

All billing reports are based on archived data/claims. Claims are archived when you process the Daysheet. If your reports do not include all revenue billed, process the daysheet then rerun the report.

Saving Reports



ALERT: Importing and exporting documents is currently unavailable for Cloud practices, and the OP Team is working hard to return the functionality as soon as possible. *The steps in this article are temporarily unavailable.*

You can use the Print to File function in OP Reports to convert reports to other formats. Most commonly, the Print to File function will be used to save reports as a PDF file or an Excel Sheet.



Note: When converting to another format, some data may be lost. PDF is the only format that is guaranteed to keep all information.

1. Open and log into **OP Reports**.
2. Select and run the report that you would wish to export.
3. Once the report has opened in a Print Preview window, click the **Print** icon button in the upper-left corner of the window.
4. Select the **Print to File** checkbox at the bottom of the Print settings pop-up dialog box.
5. Select an option from the **Type** drop-down menu.
6. Click the [...] (ellipses) icon button located next to **Where:** and select the folder where you would like to save the file on your computer.



Note: For Cloud clients: To set a save file location, select Network > TS Client > Users > 'user's name' > Choose location to save file.

7. In the 'File Name' textbox, type a title for the file, then click **Save**.
8. Click the **OK** button on the print window. Instead of the task being sent to your printer, a Setup window will appear.
9. Set any additional preferences on the Setup window, and click **OK**.
10. Your report has now been converted and saved to the location you specified.

How do I change the text in a letter?

1. Go to **OP Reports**, and log in.
2. Select the letter, right click and select **Design**.
3. Create a copy of the report by clicking **save as** before editing. (This is a safety measure since some errors may be difficult to undo.)
4. Find the field you wish to edit.
 - The text of a label can be changed by clicking on it, and editing the text in the **Set Value** textbox on the edit toolbar.
 - To change the text of a variable, right click on the variable and select **Calculations**.
5. Change the desired text. **Remember-** all text in a variable needs to be between apostrophe symbols.



NOTE: If you are not familiar with OP Reports, please contact Office Practicum Support for assistance


How do I change the report heading?

1. Open the Staff Directory (**Utilities > Manage Practice > Staff/Provider Directory**).
2. Click on the **Practice Info** tab.
3. In the **Report** heading line, type the information you would like to see as your report heading (usually practice name, address).

- The phone number will be automatically pulled to the second line of the header.

Why isn't my signature readable in a report?

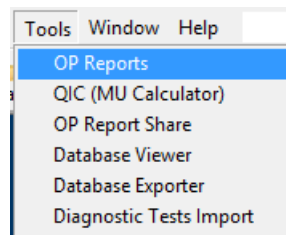
Sometimes a signature is not readable when you run a report. The signature appears illegible, dark, or as black box. This can be corrected in the Office Practicum Report Builder for the desired report. You will need to perform the following steps for each report where the signature is not readable.

Sincerely,


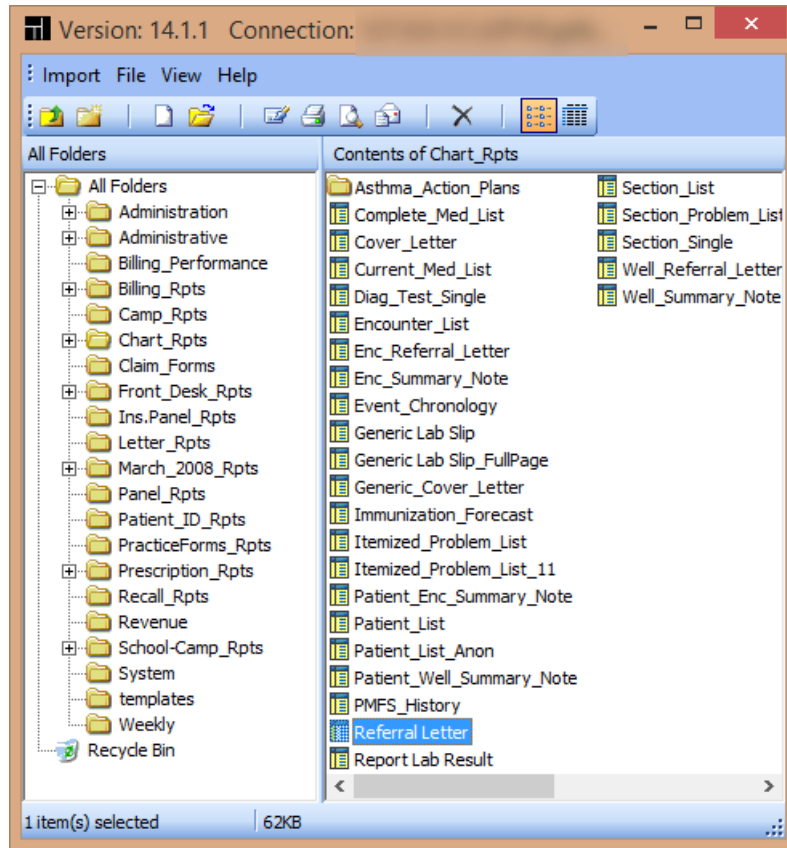
Susan J. Kressly, MD

To make the signature readable on a report:

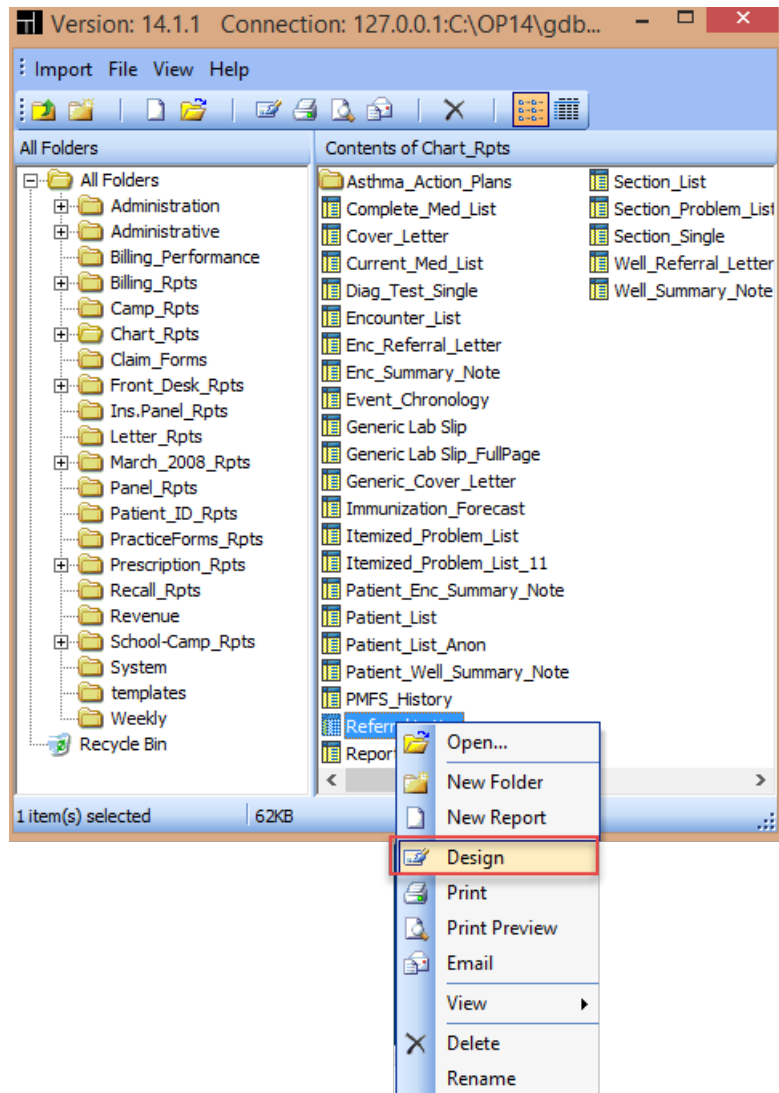
1. Select **Tools > OP Reports** from the main menu. The OP Reports window will appear.



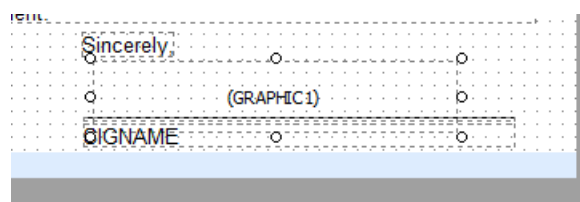
2. Locate the Referral (Referral) report, Encounter Letter Report (Enc_Referral_Letter), Well Referral Letter (Well_Referral_Letter), and any other report that requires the signature to be readable.



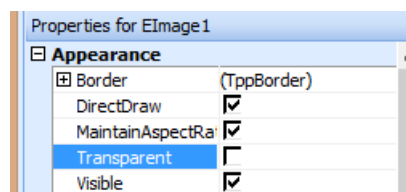
3. Right-click on the report with the signature and select **Design**. The Office Practicum Report Builder will open.



4. Locate the Graphic Location on the report where the signature would be located (usually at the bottom of the report).

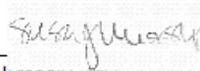


5. Click the **Graphic** indication. The Graphic image properties will appear on the left side of the window.
6. Deselect the **Transparent** checkbox.



7. Select **File > Save** to save the changes in the report.
8. Close the Office Practicum Report Builder.
9. Run the desired report. The signature will be readable.

Sincerely,





Susan J. Kressy, MD

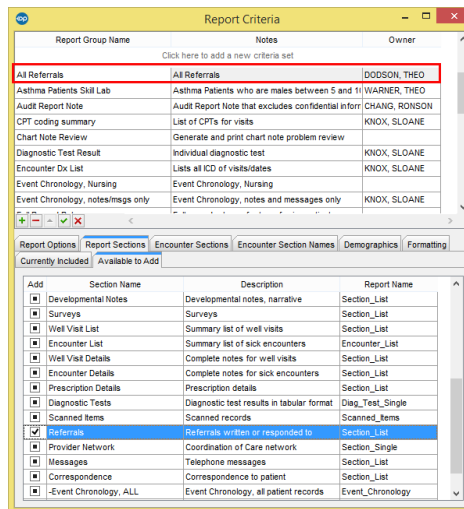
How can I pull a report showing all referrals?

Overview

There are two options to consider when wanting to pull a report showing all referrals. The first is to create a report using Event Chronology. The second is to run an SQL using Database Viewer.

Create Event Chronology Report

1. Click the **Chron** button on the Smart Toolbar.
2. Click the **Edit** button located to the right of the Report Criteria field. The Report Criteria window will open.
 - a. Click the **Insert Record** button  to add a new report.
 - b. In the Report Group Name field, enter a name for your report. For example, "All Referrals".
 - c. Enter a note (optional).
 - d. Click the **Post Edit**  button to save.
 - e. With the new report name highlighted, click the **Report Sections** tab in the lower section of the window.
 - f. Click the **Available to add** tab.
 - g. Locate the Report Section called Referrals, and click the corresponding checkbox.



- h. Click the **Post Edit** button to save.
 - i. Close the Report Criteria window.
3. Complete the following criteria:
 - Patient(s): All
 - Report Criteria: Select the report you created in the steps above.
 - Report Dates: Select the appropriate option from All, Latest number of months, or enter a specific date range.
 - Click **Search**.

Run SQL in Database Viewer

Click [here](#) for an SQL that will show total referrals including tracking entries and response.

When Will the Updated New York State School Health Examination Form Be Available?

Gail Schonfeld, MD, FAAP (NY State AAP Advocate for Changing the School Form) and Susan Kressly, MD, FAAP (Medical Director, OP) have written an open letter addressing updated New York State School Examination form. [Click here](#) to read their detailed communication discussing this issue.

How do I print batch letters?

Printing letters for reasons such as:

- Accounts in collections
- New office location
- Birthdays

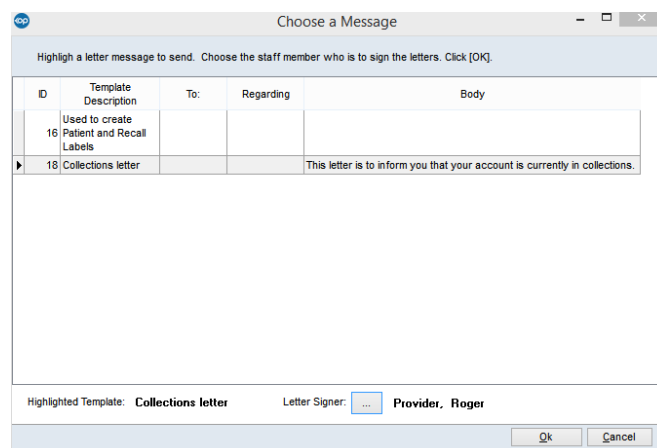
This can be accomplished using Print Letters. The Print Letters option is available from the Demographic Analysis/Recall Reports window (**Reports > Demographic Analysis and Recall**).



Note: You must have a General Letter template saved to print batch letters. [Click here](#) for additional information on how to create a General Letter template.

Once the report criteria is defined:

1. Click the **Print Letters** button.
2. Choose the letter template from the **Choose a Message** window.
3. Click the ellipse button to choose the letter signer.
4. Click **OK**.



5. Select **Recall_Letter** from the Located in **OP Reports** window.
6. Click **OK**.

Why do my Reimbursement Analysis and Billing Transaction Analysis Reports show different totals?

The Reimbursement Analysis Report reflects only Charge transactions. Payment and Adjustment information found in this report is shown as a summarized total. For this reason, this report should **not** be used for Accounting purposes.

The Billing Transaction Analysis Report does reflect Charges, Payments, and Adjustments for the specified date range. As long as the Charges, Payments, and Adjustments were daysheeted in that same date range, this report is suitable to reference for Accounting purposes.

Which reports or forms require a well visit note?

There are several reports and forms that require a well visit note charted for a patient. Below is the list that requires a well visit note. This list only includes the reports or forms installed with OP. Your practice may have added custom reports or forms, such as a WIC form, that will also require the patient to have a well visit.

- **BSA_Health**: Annual BSA Health and Medical Record Part A-C
- **ChildHealthAssessment**: Child Health Assessment
- **General School/Camp Form**: School/Camp Exam Form
- **Pop_Warner**: Pop Warner Little Scholars Inc. 2011 Physical Fitness & Medical History Form
- **AllergyAndAnaphylaxisEmergencyPlan_rev2017**: Allergy and Anaphylaxis Emergency Plan