Office Practicum

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Filtering Data

Last Modified on 12/09/2019 12:57 pm EST

Version 14.19

Overview

Throughout OP you have the ability to filter the data that you see in reports. This is especially useful when creating large reports such as the Demographic Analysis and Recall or Billing Analysis reports. Basic filters (as well as more customized filters) can be applied using the **Filter** button. The **Filter** button also allows you to remove any filters and save custom filtered reports for later use.

Apply Basic Filters

To select basic filters in a report, follow the steps below:

1. Hover over the column header that you would like to filter until a smal**Filter** button appears.
2. Click the **Filter** button.
3. Select the checkbox(es) of the data you would like to see.

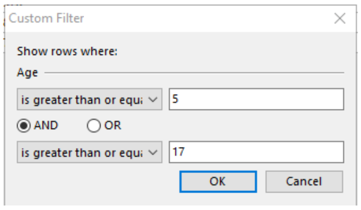
Example: You'd like to see a report of all of the patients with Aetna insurance. You run the Demographic Analysis and Recall report, but want to apply a filter to only see Aetna. To do this:

1. Hover over the Insurance Payer column.
2. Click the **Filter** button.
3. Select **Aetna**. If you have separate entries for Aetna PPO and Aetna HMO, select both checkboxes if it is appropriate to your reporting needs.

Apply Customized Filters Using the Filter Button

There are two ways to apply a customized filter to a report. The first way is to use the filter button.

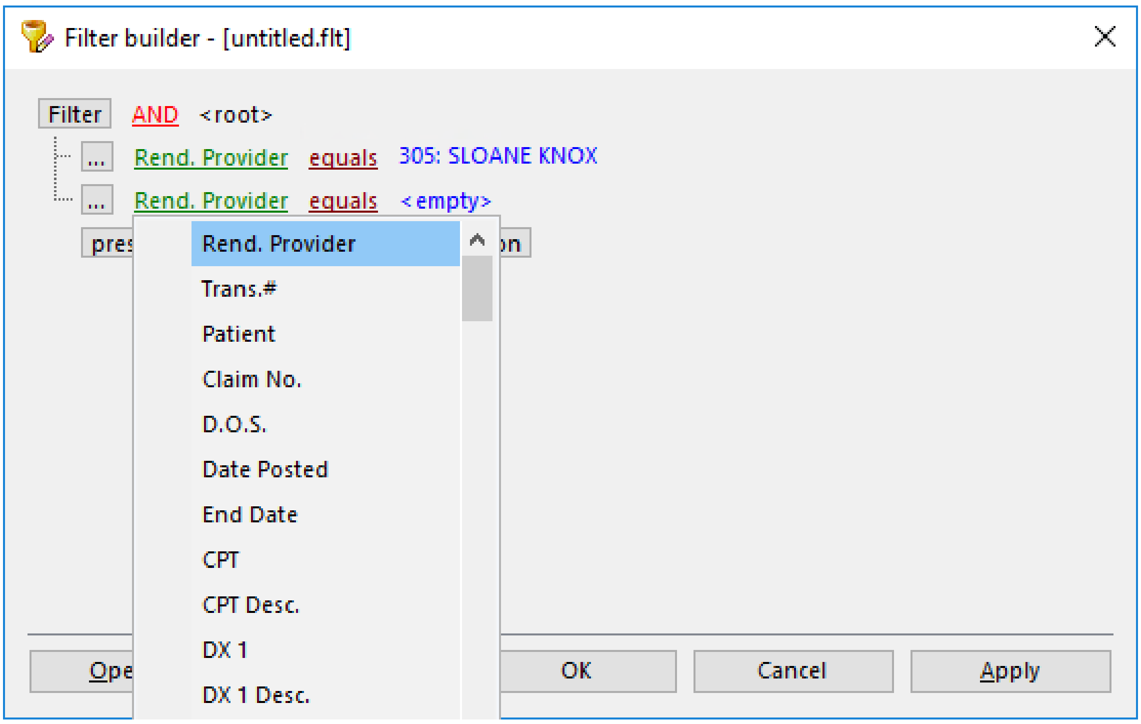
1. Hover over the header of the column you would like to filter until a smal**Filter** button appears.
2. Click the **Filter** button.
3. Select **(Custom...)**. The Custom Filter window is displayed. It contains two filter fields (And and OR). If a basic filter has already been applied, you will see the values in the Custom Filter window.
4. Select a **Filter Condition** from the drop-down menu.
5. Select the **And** or **Or** radio button.
6. Enter the column value that you would like to filter. If you're filtering a column where the data is entered in all capital letters or contains a staff ID number, enter it exactly as it appears in the column.



7. Click the **OK** button to apply the filter.

Apply Customized Filters Using the Customize Button

There are two ways to apply a customized filter to a report. The second way to apply a customized filter to your report is to use the the **Customize...** button. This button will open the Filter Builder window. The location of the **Customize...** button depends upon the report that you are filtering.



- From the Demographic Analysis and Recall Report: **Customize...** is located in the lower-right corner of the window after a filter (either basic or custom) has been applied.
- From the Billing Transaction Analysis Report and other Billing Reports: A small filter icon is located in the lower-left corner of the window. After one filter has been applied, the **Customize...** button will appear in the lower-right corner of the window.

Remove Filters

To remove filters from a data grid/report, click the **X** in the lower-left corner of the filter builder bar.

Save Customized Filters

To retain a customized filtered report for later use, you have the option to save the filter. After you have applied all filters:

1. Click the **Customize...** button if the Filter Builder window is not already open.
2. Click the **Save As...** button. The Save the active filter to file window displays.
3. Select the **location** and enter a **name** for the report.
4. Click the **OK** button to exit the window.

Apply a Customized Filter Report

To locate and run the saved filtered report, you must first run the desired report. You will also have to filter a column for the **Customize...** button to display.

1. Click the **Customize...** button.
2. Click the **Open** button.
3. Navigate to the location where you saved the filtered report.
4. Select the **report** and click the **Open** button.
5. From the Filter builder window, click the **Apply** button.
6. Click the **OK** button to exit the window.

Version 14.10

Overview

Throughout OP 14, you have the ability to filter the data that you see in reports. This is especially useful when creating large reports such as the Demographic Analysis and Recall or the Billing Transaction Analysis reports. Basic filters (as well as more customized filters) can be applied using the **Filter** button. The **Filter** button also allows you to remove any filters and save custom filtered reports for later use. After running your reports, follow these steps:

Apply Basic Filters

To select basic filters in a report, follow the steps below:

1. Hover over the column header that you would like to filter until a smal**Filter** button appears.
2. Click the **Filter** button.
3. Select the checkbox(es) of the data you would like to see.

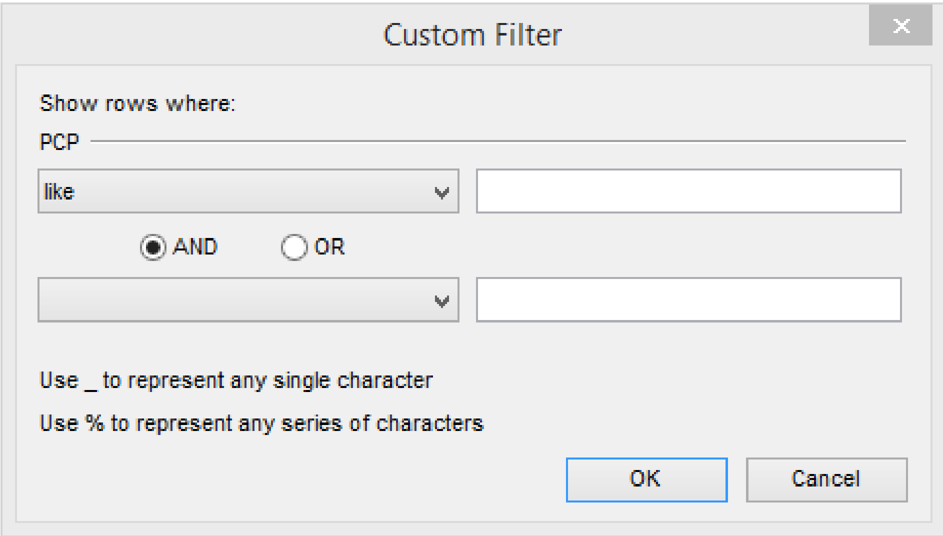
Example: You'd like to see a report of all of the patients with Aetna insurance. You run the Demographic Analysis and Recall report, but want to apply a filter to only see Aetna. To do this:

1. Hover over the Insurance Payer column.
2. Click the **Filter** button.
3. Select Aetna. If you have separate entries for Aetna PPO and Aetna HMO, select both checkboxes if it is appropriate to your reporting needs.

Apply Customized Filters Using the Filter Button

There are two ways to apply a customized filter to a report. The first is to use the filter button.

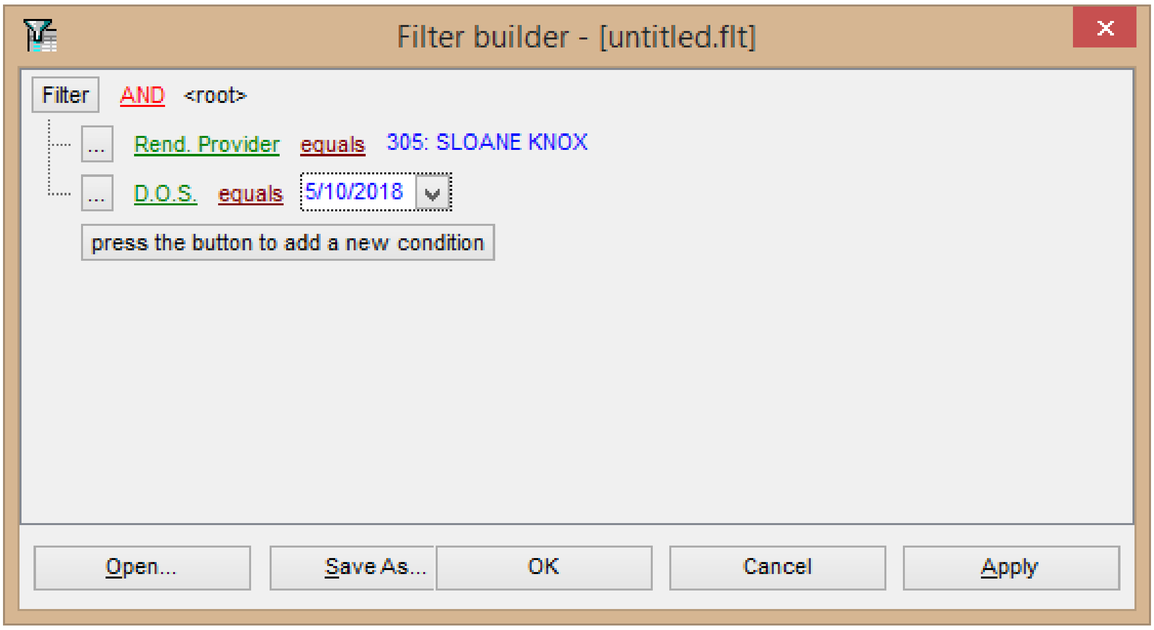
1. Hover over the header of the column you would like to filter until a smal**Filter** button appears.
2. Click the **Filter** button.
3. Select **(Custom...)**. The Custom Filter window appears. It contains two filter fields (And and OR). If a basic filter has already been applied, you will see the values in the Custom Filter window.



4. Using the dropdowns, select the filter condition.
5. Select the **And** or **Or** radio button.
6. Enter the column value that you would like to filter. If you're filtering a column where the data is entered in all capital letters or contains a staff ID number, then be sure to enter it exactly as it appears in the column.
7. Close the Custom Filter window.

Apply Customized Filters Using the Customize... Button

The second way to apply a customized filter to your report is to use the the**Customize...** button. This button will open the Filter Builder window. The location of the **Customize...** button depends on the report that you are filtering.



- From the Demographic Analysis and Recall Report: **Customize...** is located in the lower-right corner of the window after a filter (either basic or custom) has been applied.
- From the Billing Transaction Analysis Report and other Billing Reports: A small filter icon is located in the lower-left corner of the window. After one filter has been applied, the **Customize...** button will appear in the lower-right corner of the window.

Remove Filters

To remove filters from a data grid/report, click the **X** in the lower-left corner of the filter builder bar.

Save Customized Filters

To retain a customized filtered report for later use, you have the option to save the filter. After you have applied all filters:

1. Click the **Customize...** button if the Filter Builder window is not already open.
2. Click the **Save As...** button. The Save the active filter to file window displays.
3. Select the location and enter a name for the report.
4. Click **OK** to exit the window.

Apply a Customized Filter Report

To locate and run the saved filtered report, you must first run the desired report. You will also have to filter a column for the **Customize...** button to display.

1. Click the **Customize...** button.
2. Click the **Open** button.
3. Navigate to the location where you saved the filtered report.
4. Select the report and click **Open**.
5. From the Filter builder window click the **Apply** button.
6. Click **OK** to exit the window.

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