OP Portal Reports

Last Modified on 10/02/2024 11:55 am EDT

About

Your OP Portal has multiple reports that you can run to track engagement, Audit Log tracking, Notification tracking, and more. This article will walk you through the major type of reports that will help you and your practice to view your portal data, troubleshoot any issues, and track patient engagement.

Engagement Report

The Engagement Report opens as your main page when you log into the OP Portal as an Admin. This report is updated every night, so there may be a slight delay in the overview data.

Categories

The main Category, **Communications**, shows all information relating to actions taken on the portal, such as Unique Logins, your Active Patient Population, Messages data flow from OP for documents, forms, prescriptions, appointments and more. You can narrow down the view by clicking the **Category** field and selecting **Engagement** (shows the number of patients that have viewed by page in the OP Portal), **Operations** (shows the number of patients that have viewed billing, scheduling, and forms) or **Portal adoption** (shows active patients, logins, messages, and others).

Filters

You can filter the data of each category view by date. There are two selection type drop-downs, **Predefined date** and **Previous periods**. Clicking in the **Predefined date** dropdown will allow you to select the date range you would like to see, eg This year, This month, Last week. Clicking in the **Previous Periods** drop-down will allow you to select how many of the previous periods selected in the date field you want to see. For example, if you choose 'This month' in the Predefined date, and '4' in the Previous Periods, you will be shown data from this month and the previous 4 months.

View

The data in the Engagement report can be viewed in **graph** format, or a **table**. The graphs will show a line chart with data points you can over over to view specifics. The table format will show you the metric on the left and the date range periods across the top.

You can also choose to view the engagement **Source** which will show you data and engagement that came from either a **Mobile** device or the **web**.

Audit Log

The Audit Log tracks touchpoints throughout your portal, and you can run the reports to see who did what such as Appointment status , or look up specific actions such as Welcome emails sent or notifications received. You can download these reports, however please note that the download will only show the first 1000 rows of whatever you have filtered.

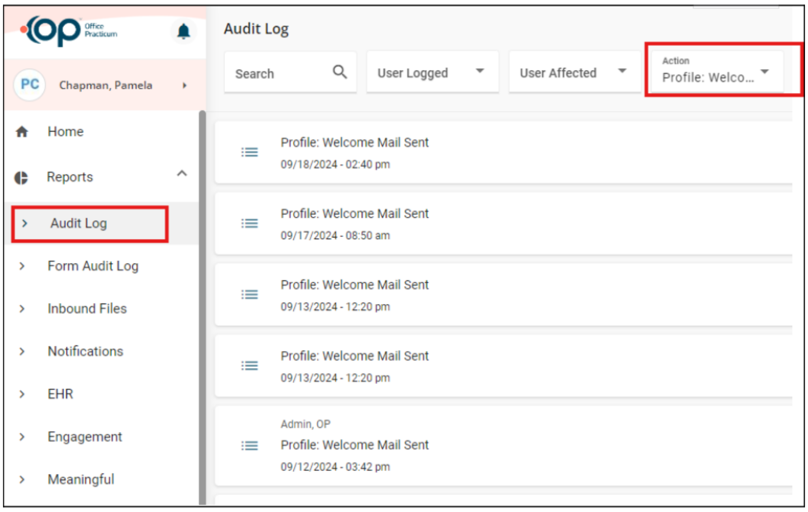
To view specific Audit Log reports, click the **Action** field and scroll or start typing and select the report you wish to view. Some Audit Log types that may be useful for your practice are:

- **Profile: Welcome Mail Sent** - Use this report to track whether or not welcome emails have been sent.
- **Maturity Age Reached** - Use this report to see if a patient has reached the age of maturity, and will need their own account created.
- **User: First Time Log in** - Run this report to see how many people and who logged in for the first time.
- **Appointment Request** or **Prescription Request** - Use these report to track or confirm appointments and prescription requests.

Any other actions that users may take (eg editing a warning message, add/edit/delete Message tags, etc) can be tracked using the Audit log.

Example: View Welcome Emails that were sent:

1. Log into the OP Portal as an admin.
2. On the left navigation, select **Reports** > **Audit Log**.
3. In the **Action** field, start typing "Welcome" and select **Profile: Welcome Mail Sent**.



4. A list of all of the Welcome emails sent, in reverse chronological order, will appear.
   - You can see the **date** and **time** sent in each row item.
   - To see more details such as the person and email address it was sent to, **click on the row**.
   - To search for a specific person, click in the **Search** field and type the parent's last name + first name (eg "Smith+John"). Click on that row to see more details.

Notifications

In the Notifications report, you can see all notifcations that were sent to parents, providers and staff, and what they were. You can filter in similar ways to the Audit Log (by Action type, User, date, Patient), with the additions of filtering by notifications that were sent by Email or text message (SMS).

Form Audit Log

In the Form Audit Log, you can track which form/document types were requested by which patient, and when. Filter this report by Date, Type (Completed, Open), and User. Like the Audit Log, you can click to view the details of the request including the patient, type, and date & time.