



Transition from the Report Builder module to the new Custom Report Viewer

Custom Report Viewer

Discover the New Custom Report Viewer! The module, formerly known as *Report Builder*, has been revamped and is now called **Custom Report Viewer**. This updated version retains all the functionality of the original Report Builder, with added value: it allows you to create, customize, generate, and store reports tailored to your specific needs. With a more intuitive interface and a step-by-step guided process, you can now:

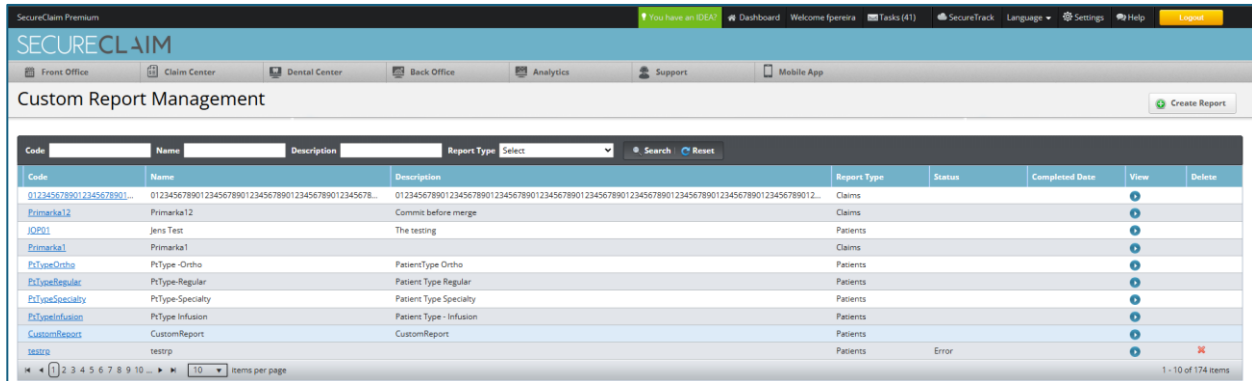
- Select the type of report you want to generate.
- Choose the most relevant columns based on your needs.
- Apply custom filters to refine your results.
- Save your favorite reports for quick access and ongoing use.

Custom Report Viewer enables you to create accurate, relevant, and personalized reports simply and efficiently.

Keep reading to discover how this new tool can boost your medical practice's efficiency by helping you manage reports more effectively!

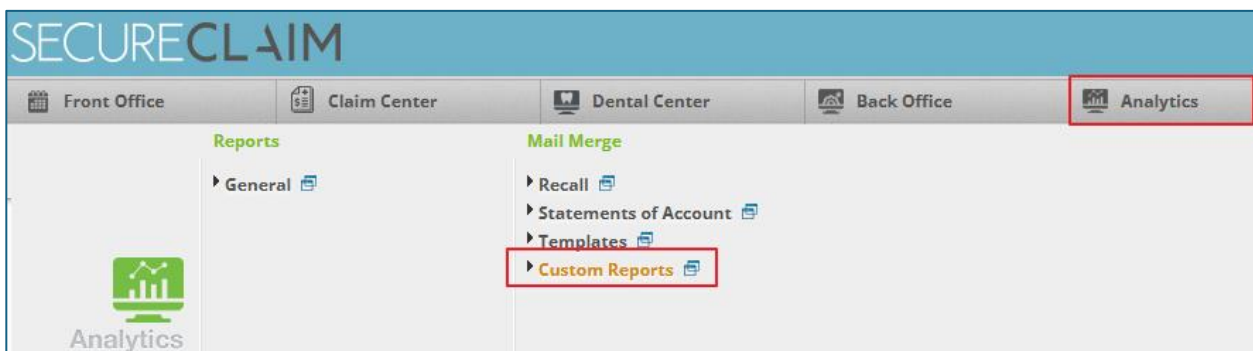
More control. More transparency. Better management.

Overview of Custom Report Management



The screenshot shows the 'Custom Report Management' page. At the top, there's a navigation bar with 'Front Office', 'Claim Center', 'Dental Center', 'Back Office', 'Analytics', 'Support', and 'Mobile App'. Below this is a search bar with fields for 'Code', 'Name', 'Description', and 'Report Type'. A table lists various reports with columns for Code, Name, Description, Report Type, Status, Completed Date, View, and Delete. The table includes reports like 'Primarka12', 'JQD1', 'Primarka1', 'PtTypeOrtho', 'PtTypeRegular', 'PtTypeSpecialty', 'PtTypeInfusion', 'CustomReport', and 'testtr'. A 'Create Report' button is visible in the top right corner.





You can access the Custom Report Viewer through the main menu: **Analytics > Custom Reports**.



From this section, you can manage your custom reports: view them, generate them, edit them, or delete them as needed.

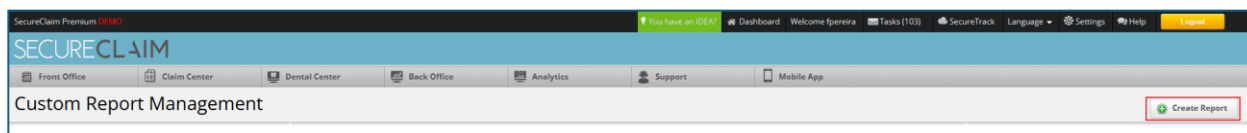
Below are some of the available actions in the **Custom Report Viewer**:

- **Create a new Custom report**
 - Click the **Create Report** button.
- **Edit an existing report**
 - Click the hyperlink in the report's **Code** that you want to modify.
- **Download a report**

- Once the report status is **Completed**, you can download it by clicking the button with the green arrow icon .
- **View report history**
 - Click the **View History**  button to see the report's generation history.
- **View a report**
 - Click the **View** button .
- **Delete a report**
 - Click the **Delete**  button.

How to Create a Custom Report in the Custom Report Viewer

To create a new report, click the **Create Report** button. A pop-up window titled **Create Report** will appear, featuring a simple, guided interface with just three steps to help you quickly and easily generate a customized report.



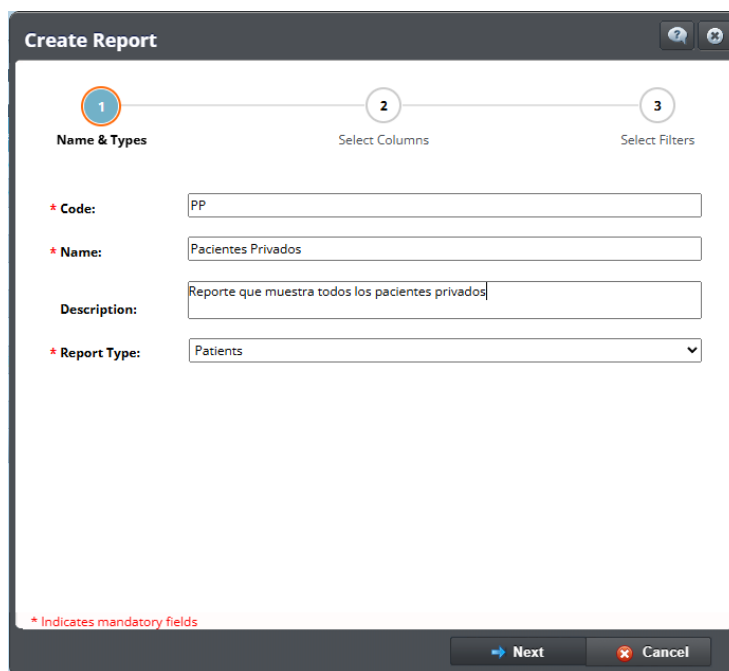
Step 1: Name & Types

In this step, you must enter the following information for your new report:

- Code
- Report Name
- Description
- Type: You can choose between **Patient** or **Claims**

Once you have completed these fields, click the **Next** button to proceed to the next step.

Note: Fields marked with an asterisk (*) are required.



Create Report

1 **Name & Types** 2 **Select Columns** 3 **Select Filters**

* **Code:**

* **Name:**

Description:

* **Report Type:**

* Indicates mandatory fields


[Next](#) [Cancel](#)

Step 2: Select Columns

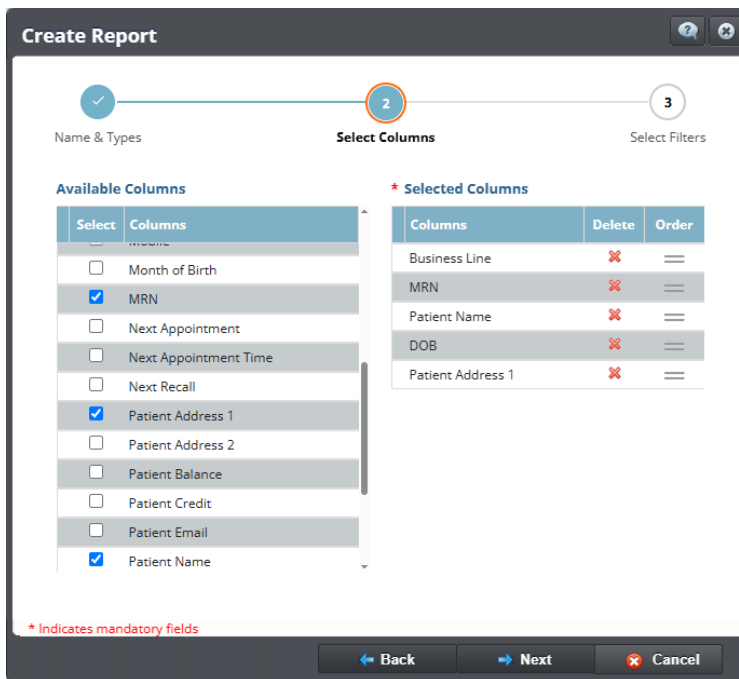
In this step, you can choose the columns you want to include in your report.

- On the left-hand table, called **Available Columns**, you'll find all the available columns.
- The system automatically preselects some columns based on the **Type** chosen in Step 1.
- To add additional columns, simply check the boxes to the left of each column name.
- The selected columns will move to the right-hand table, called **Selected Columns**, in the same order in which you selected them.

Options for managing the selected columns:

- To reorder the columns, click the **Order** icon, hold down the left mouse button, and drag the column to the desired position.
- To delete a column, click the **Delete**  icon.

Once you have finished selecting and ordering the columns, click the **Next** button to continue.



Create Report

Progress: 1. Name & Types (checked) → 2. Select Columns (active) → 3. Select Filters

Available Columns

Select	Columns
<input type="checkbox"/>	Month of Birth
<input checked="" type="checkbox"/>	MRN
<input type="checkbox"/>	Next Appointment
<input type="checkbox"/>	Next Appointment Time
<input type="checkbox"/>	Next Recall
<input checked="" type="checkbox"/>	Patient Address 1
<input type="checkbox"/>	Patient Address 2
<input type="checkbox"/>	Patient Balance
<input type="checkbox"/>	Patient Credit
<input type="checkbox"/>	Patient Email
<input checked="" type="checkbox"/>	Patient Name

*** Selected Columns**

Columns	Delete	Order
Business Line	✖	==
MRN	✖	==
Patient Name	✖	==
DOB	✖	==
Patient Address 1	✖	==

* Indicates mandatory fields

Buttons: Back, Next, Cancel

Step 3: Select Filters

In this final step, you can specify the filters you want to apply to refine your report results.

Use the table to select:

- The Type of filter
- The Condition
- The Value

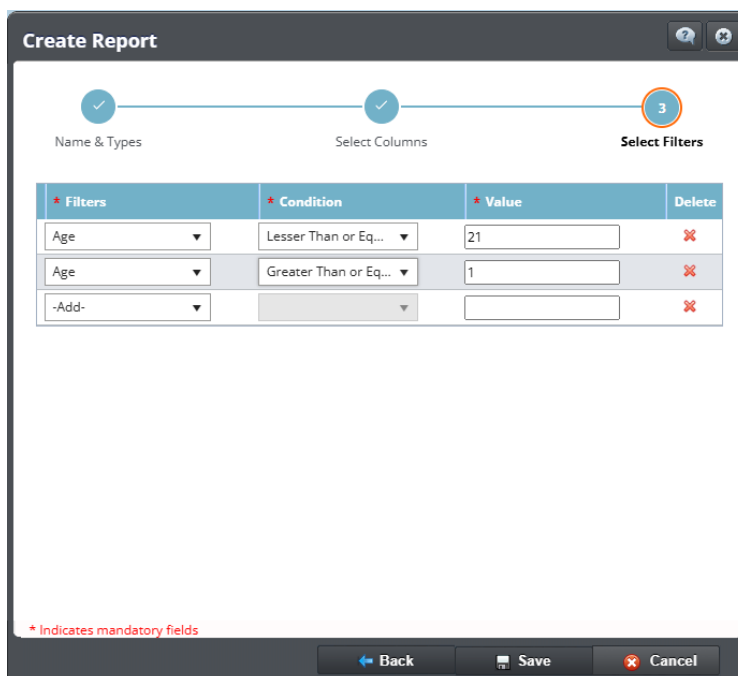
These filters will allow you to tailor the report to your specific needs.

Example:

If you want to generate a patient report that includes only minors, you can apply the

Age filter with the condition **Less Than or Equal To** and the value **21**. This way, the report will show only patients aged 21 or younger.

You can add as many filters as you need, including duplicate filters. For example, to define a date range, you can use two **Age** filters: one with the condition **Greater Than or Equal To** for the start date, and another with the condition **Less Than or Equal To** for the end date.



The 'Create Report' dialog box shows a progress bar with three steps: 'Name & Types' (completed), 'Select Columns' (completed), and 'Select Filters' (active, indicated by a red circle with the number 3). Below the progress bar is a table for configuring filters.

* Filters	* Condition	* Value	Delete
Age ▼	Lesser Than or Eq... ▼	21	✖
Age ▼	Greater Than or Eq... ▼	1	✖
-Add- ▼	▼		✖

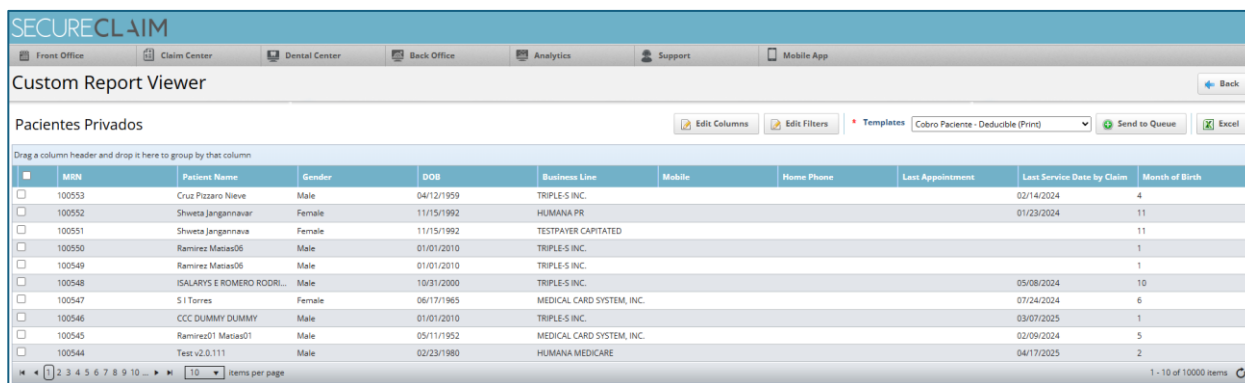
* Indicates mandatory fields

Buttons at the bottom: Back, Save, Cancel.

Once you have configured all the filters and their conditions, click the **Save** button to save your report.



Custom Report Viewer Overview



The screenshot shows the 'Custom Report Viewer' interface. At the top, there's a navigation bar with options like 'Front Office', 'Claim Center', 'Dental Center', 'Back Office', 'Analytics', 'Support', and 'Mobile App'. Below this, the title 'Custom Report Viewer' is displayed. A 'Back' button is in the top right. The main content area shows a report titled 'Pacientes Privados'. Above the table, there are buttons for 'Edit Columns', 'Edit Filters', and 'Templates'. A dropdown menu shows 'Cobro Paciente - Deducible (Print)', and there are 'Send to Queue' and 'Excel' buttons. The table itself has columns: 'MNU', 'Patient Name', 'Gender', 'DOB', 'Business Line', 'Mobile', 'Home Phone', 'Last Appointment', 'Last Service Date by Claim', and 'Month of Birth'. The first row is selected. At the bottom, there's a pagination bar showing '1 - 10 of 10000 items'.

MNU	Patient Name	Gender	DOB	Business Line	Mobile	Home Phone	Last Appointment	Last Service Date by Claim	Month of Birth
<input checked="" type="checkbox"/>	100553	Cruz Pizzaro Nieve	Male	04/12/1959	TRIPLE-S INC.			02/14/2024	4
<input type="checkbox"/>	100552	Shweta Jangannavar	Female	11/15/1992	HUMANA PR			01/23/2024	11
<input type="checkbox"/>	100551	Shweta Jangannavar	Female	11/15/1992	TESTPAVER CAPITATED				11
<input type="checkbox"/>	100550	Ramirez Matias06	Male	01/01/2010	TRIPLE-S INC.				1
<input type="checkbox"/>	100549	Ramirez Matias06	Male	01/01/2010	TRIPLE-S INC.				1
<input type="checkbox"/>	100548	SALARYS E ROMERO RODRIGUEZ	Male	10/31/2000	TRIPLE-S INC.			05/08/2024	10
<input type="checkbox"/>	100547	S I Torres	Female	06/17/1965	MEDICAL CARD SYSTEM, INC.			07/24/2024	6
<input type="checkbox"/>	100546	CCC DUMMY DUMMY	Male	01/01/2010	TRIPLE-S INC.			03/07/2025	1
<input type="checkbox"/>	100545	Ramirez01 Matias01	Male	05/11/1952	MEDICAL CARD SYSTEM, INC.			02/09/2024	5
<input type="checkbox"/>	100544	Test v2.0.111	Male	02/23/1980	HUMANA MEDICARE			04/17/2025	2

After saving a new report, you can view it immediately or access it anytime from the **Custom Report Management** screen by clicking the **View** button. This will open the configured report in the **Custom Report Viewer** screen

At the top left of the results table, you will find the report name. The data will be displayed in a table according to the established configuration, with the selected columns and results filtered based on the applied conditions.

Within the **Custom Report Viewer** screen, you can perform the following actions:

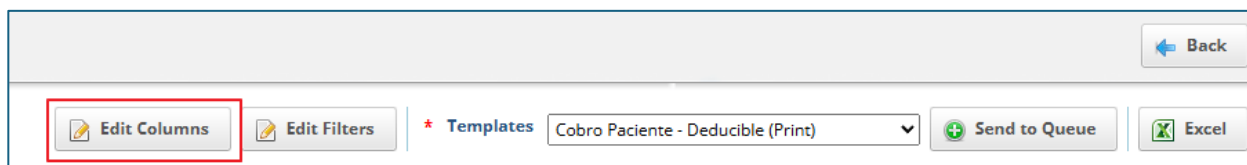
- **Select specific results:** check the boxes to the left of each row to include only the desired results in your report.
- **Group by columns:** drag a column to the area that says “Drag a column header and drop it here to group by that column” to group the data.
- **Export to Excel:** download the selected results in Excel format for your analysis or records.
- **Generate PDF report:** create the report in PDF format using the *available *templates*.

- **Send emails:** send notifications or mass communications by email directly to patients using the *available* ***templates**.

Making Changes to Reports

Modify Columns:

To change the columns included in the report, click the **Edit Columns** button. This will open the report editing screen at **Step 2: Select Columns**, where you can reorder, add, or remove columns according to your needs.



Toolbar showing the **Edit Columns** button (highlighted with a red box), **Edit Filters**, *** Templates** (Cobro Paciente - Deducible (Print)), **Send to Queue**, and **Excel**.



Edit Report dialog showing the **Select Columns** step (Step 2 of 3).

Available Columns

Select	Columns
<input checked="" type="checkbox"/>	Age
<input checked="" type="checkbox"/>	Business Line
<input type="checkbox"/>	City
<input checked="" type="checkbox"/>	DOB
<input type="checkbox"/>	Family Balance
<input type="checkbox"/>	Gender
<input type="checkbox"/>	Group Name
<input type="checkbox"/>	Group Number
<input type="checkbox"/>	Home Phone
<input type="checkbox"/>	Last Appointment
<input type="checkbox"/>	Last Payment Amount

*** Selected Columns**

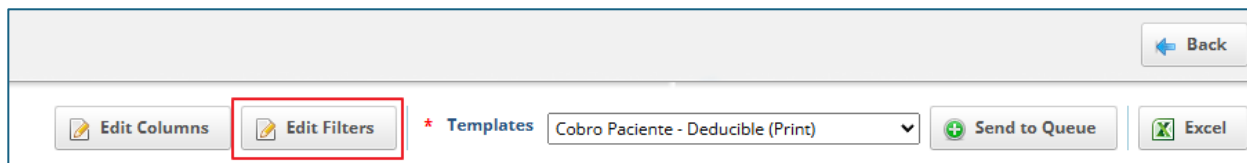
Columns	Delete	Order
MRN	✖	==
Patient Name	✖	==
DOB	✖	==
Age	✖	==
Business Line	✖	==
Policy Number	✖	==

* Indicates mandatory fields

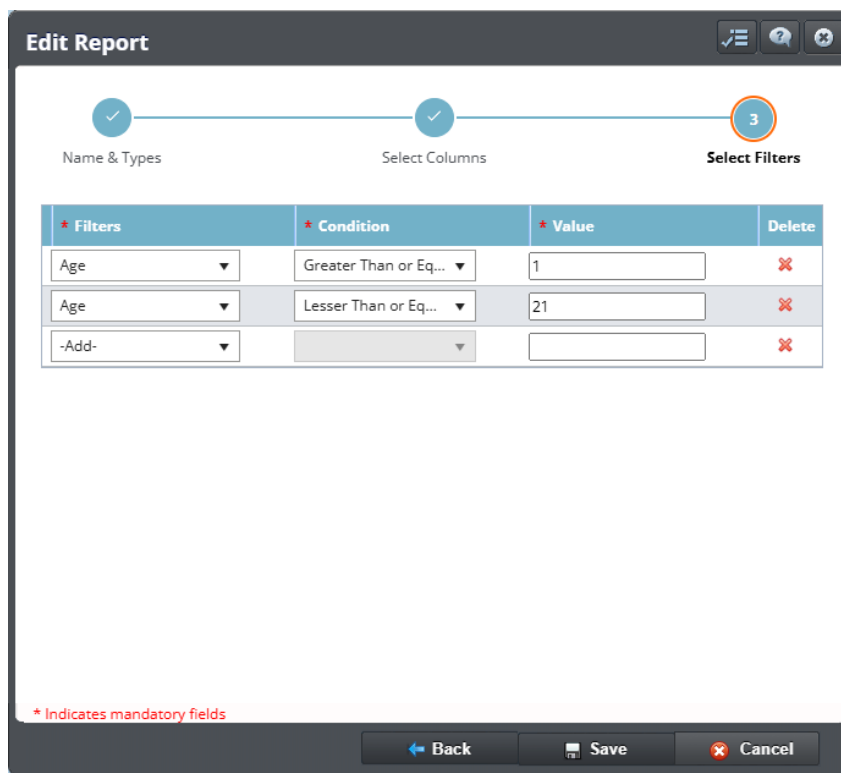
Buttons: **Back**, **Next**, **Cancel**

Modify Filters:

To adjust the applied filters, click the **Edit Filters** button. This will open the report editing screen at **Step 3: Select Filters**, allowing you to modify the conditions to refine the report results.



Toolbar showing buttons: Edit Columns, **Edit Filters** (highlighted with a red box), Templates, Cobro Paciente - Deducible (Print), Send to Queue, and Excel. A Back button is also visible in the top right corner.



Edit Report

Progress bar: Name & Types (checked), Select Columns (checked), **Select Filters (3)**

* Filters	* Condition	* Value	Delete
Age ▼	Greater Than or Eq... ▼	1	✕
Age ▼	Lesser Than or Eq... ▼	21	✕
-Add- ▼			✕

* Indicates mandatory fields

Buttons: Back, Save, Cancel

Available Actions for your Reports

In addition to being able to export the report in Excel format, there are several actions you can take with the report results, specifically with **Patient** reports, where you can send notifications or mass communications directly to patients via email using templates.

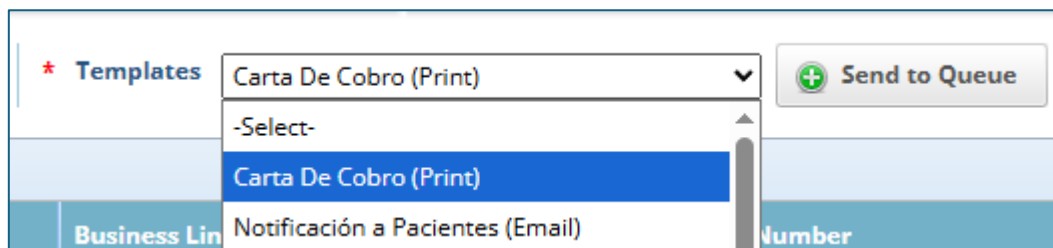
Common types of communications include:

- Billing letters
- Health promotions
- Recalls
- Commemorative cards
- Customized labels, and many others.

To carry out these types of actions in the new **Custom Report Viewer**, the area called **Templates** is used. This section displays a list of all templates created in SecureClaim (accessible via Analytics > Templates).

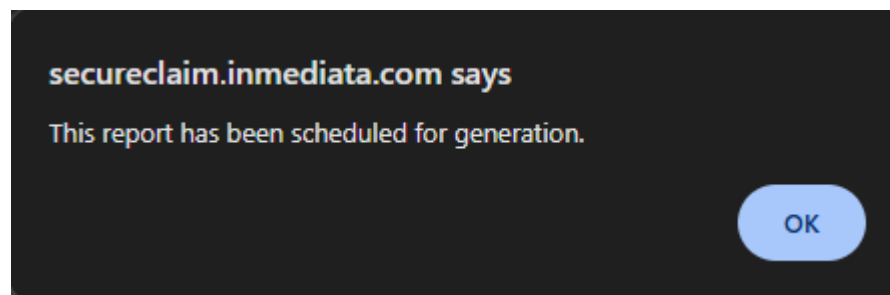
It is important to note that each template includes a suffix in parentheses indicating its type:

- **Print** (PDF document for printing)
- **Email** (sent by email)



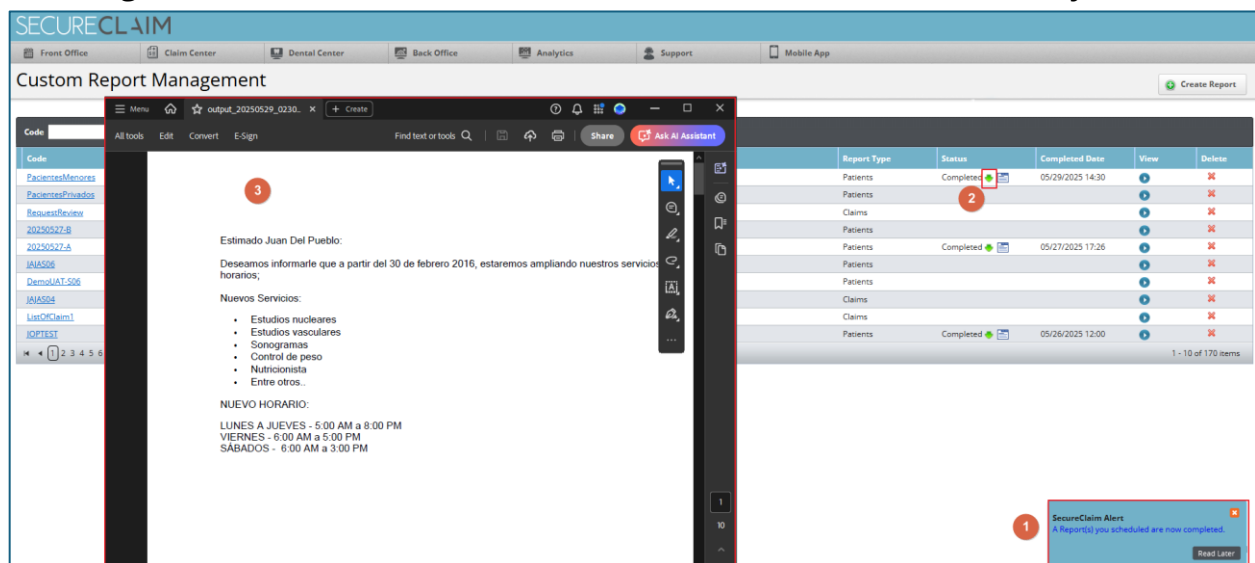
If you want to generate a bulk report for your patients, such as a billing letter, select the corresponding template in the **Templates** field and then click the **Send to Queue** button.

The system will notify the user that the report has been sent to the print queue for processing and generation.



When the report has been completed, the user will receive a notification in the bottom right corner of the screen, which will include a hyperlink to access the report from any section of SecureClaim.

On the Custom Report Management screen, you will be able to see the report with the status **Completed**. From there, you can download it by clicking the button with the green arrow icon and save it to your PC.



The screenshot shows the 'Custom Report Management' interface. On the left, a sidebar lists various report templates. The main area displays a preview of a report for 'Estimado Juan Del Pueblo', detailing service expansions and new services. On the right, a table lists generated reports with columns for Report Type, Status, Completed Date, View, and Delete. A red circle '2' highlights a 'Completed' status with a green arrow icon. A red circle '3' highlights the 'View' button. A red circle '1' highlights a 'SecureClaim Alert' notification in the bottom right corner stating 'A Report(s) you scheduled are now completed.' with a 'Read Later' button.

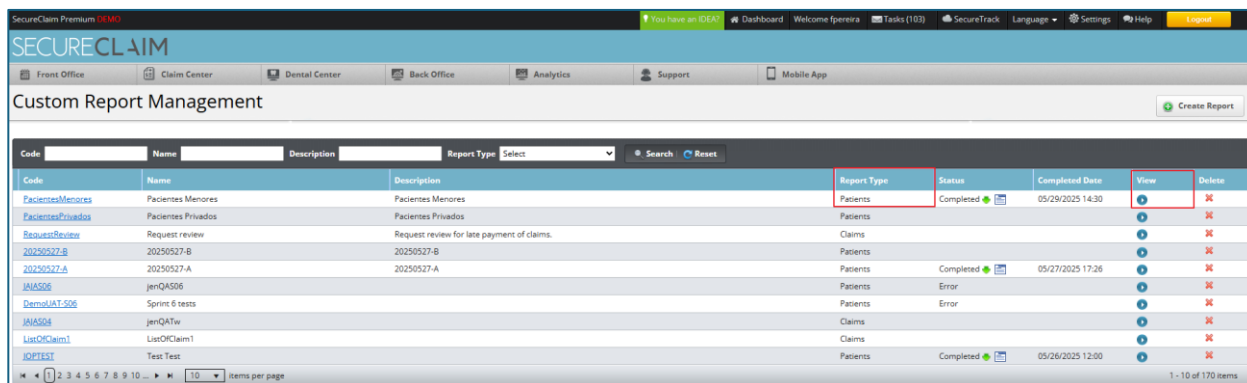
Report Type	Status	Completed Date	View	Delete
Patients	Completed	05/29/2025 14:30		
Patients				
Claims				
Patients				
Patients	Completed	05/27/2025 17:26		
Patients				
Claims				
Claims				
Patients	Completed	05/26/2025 12:00		

1 - 10 of 170 items

Reports Previously Created by the Old Report Builder

Reports previously created in the former **Report Builder** module are available in the new **Custom Report Viewer** module.

To generate the previously created reports, you can access them from the Custom Report Management screen by clicking the **View** button.



Code	Name	Description	Report Type	Status	Completed Date	View	Delete
PacientesMenores	Pacientes Menores	Pacientes Menores	Patients	Completed	05/29/2025 14:30		
PacientesPrivados	Pacientes Privados	Pacientes Privados	Patients				
RequestReview	Request review	Request review for late payment of claims.	Claims				
20250527-B	20250527-B	20250527-B	Patients				
20250527-A	20250527-A	20250527-A	Patients	Completed	05/27/2025 17:26		
JIAS06	jenQA506		Patients	Error			
DemoIAT-006	Sprint 6 tests		Patients	Error			
JIAS04	jenQATw		Claims				
ListOfClaim1	ListOfClaim1		Claims				
JOP1431	Test Test		Patients	Completed	05/26/2025 12:00		

Once inside the **Custom Report Viewer** screen, you will be able to view the results exactly as they were configured when the report was created using the Report Builder.

Enjoy a refreshed design and enhanced features that boost efficiency in managing your practice! We invite you to explore all the advantages offered by the Custom Report Viewer and make the most of this tool to generate reports tailored to your needs. Your experience will be faster, more centralized, and more efficient!

We would love to hear your feedback on the new Custom Report Viewer of SecureClaim. You can share your comments and suggestions through the Ideas Portal.