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

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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:

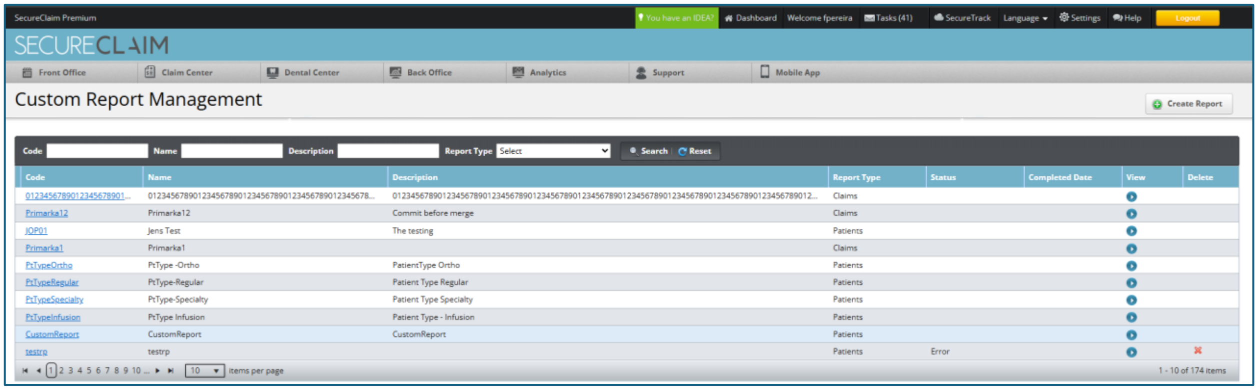
- Select the type of report you want to generate.
- Choose the most relevant columns based on your needs.
- Apply custom filters to refine your results.
- Save your favorite reports for quick access and ongoing use.

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

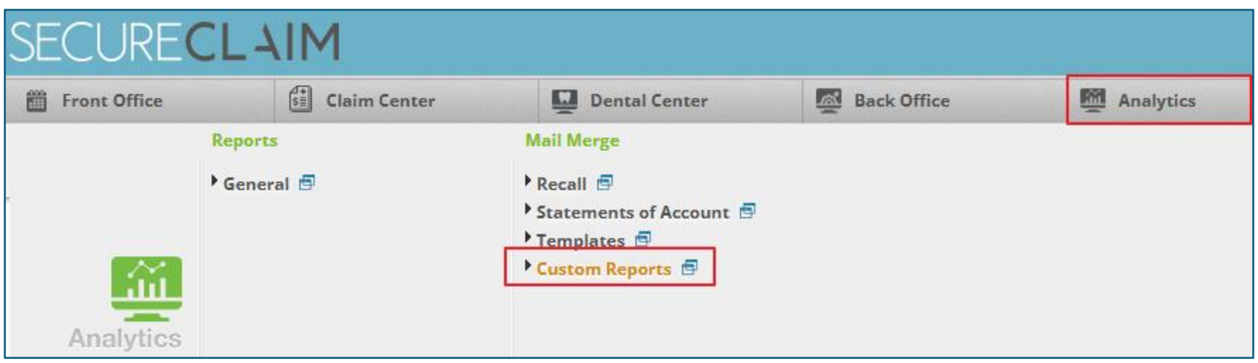
Keep reading to discover how this new tool can boost your medical practice's efficiency by helping you manage reports more effectively!

More control. More transparency. Better management.

Overview of Custom Report Management



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.

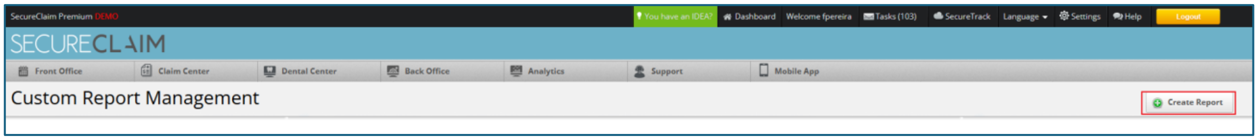
Below are some of the available actions in the **Custom Report Viewer**:

- **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.

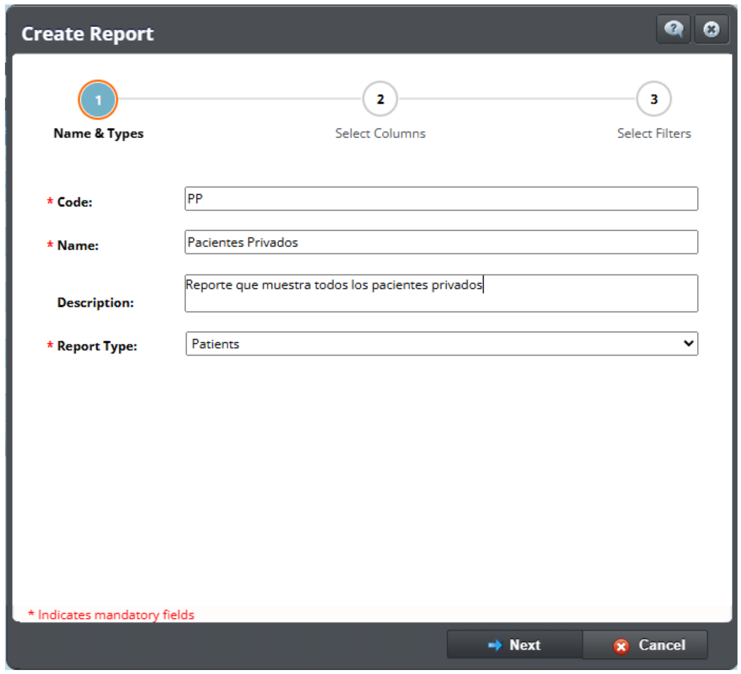


Step 1: Name & Types

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.



Step 2: Select Columns

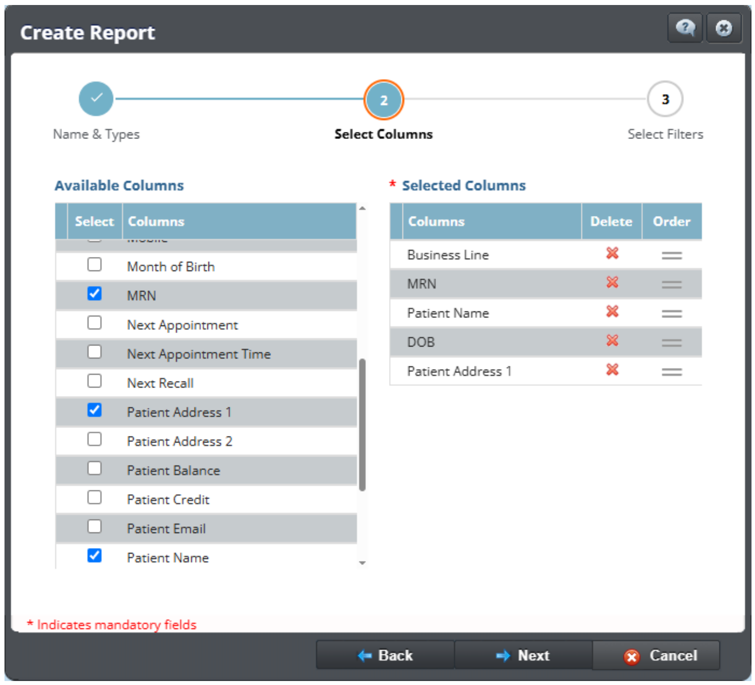
In this step, you can choose the columns you want to include in your report.

- 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.



Step 3: Select Filters

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

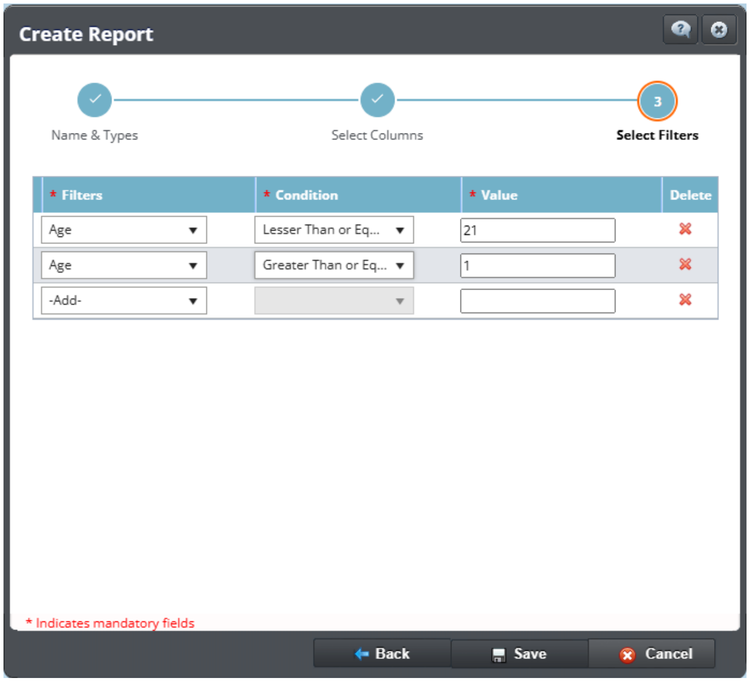
Use the table to select:

- 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.



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

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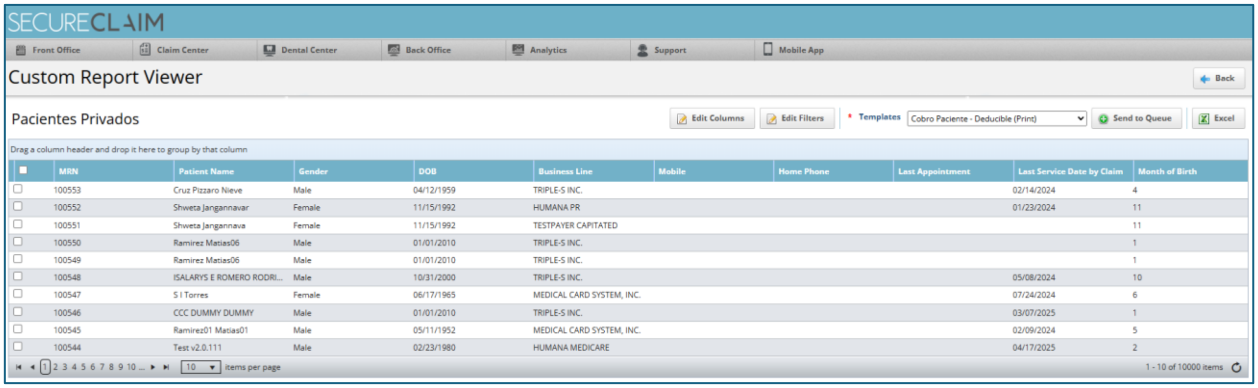
Custom Report Viewer Overview



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:

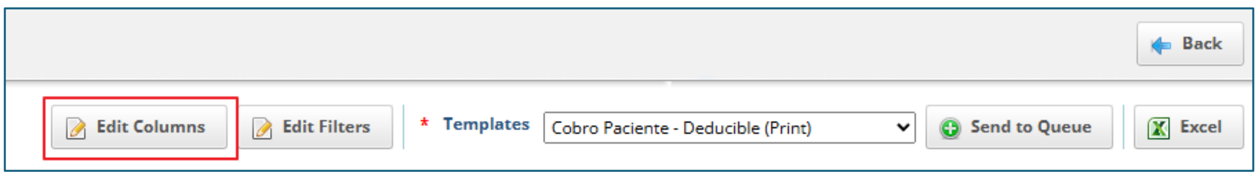
- **Select specific results:** check the boxes to the left of each row to include only the desired results in your report.
- **Group by columns:** drag a column to the area that says “Drag a column header and drop it here to group by that column” to group the data.
- **Export to Excel:** download the 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:

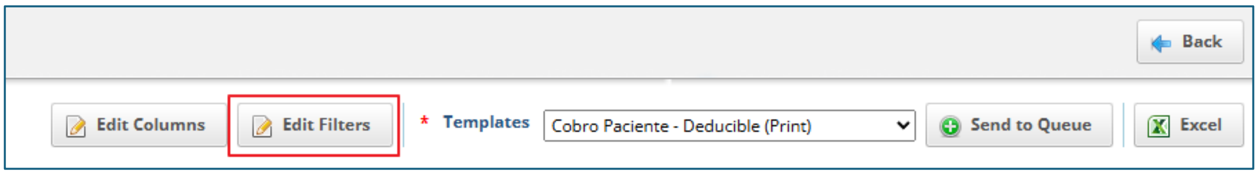
To change the columns included in the report, click the **Edit Columns** button. This will open the report editing screen at **Step 2: Select Columns**, where you can reorder, add, or remove columns according to your needs.

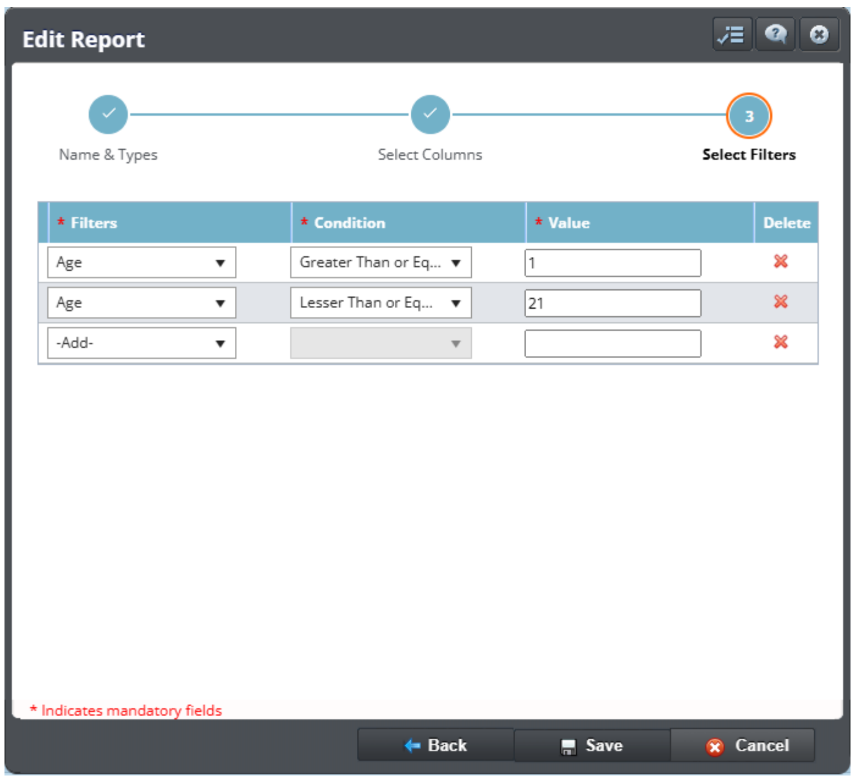


**The templates must be created beforehand.*

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.





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:

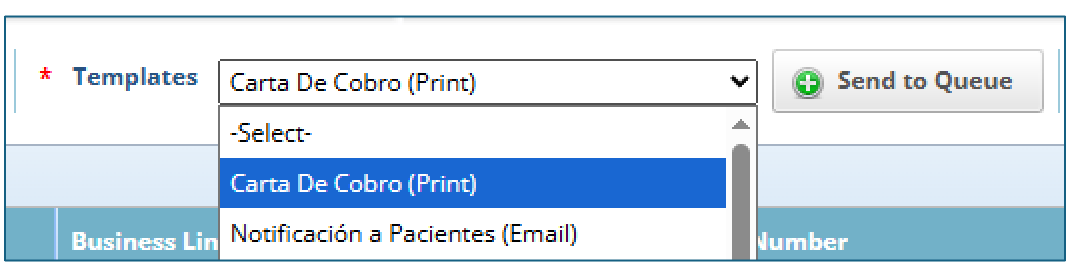
- Billing letters
- Health promotions
- Recalls
- Commemorative cards
- Customized labels, and many others.

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).

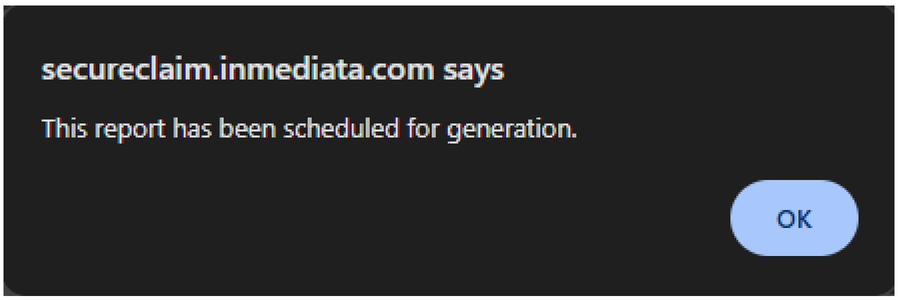
It is important to note that each template includes a suffix in parentheses indicating its type:

- **Print** (PDF document for printing)

- **Email** (sent by email)

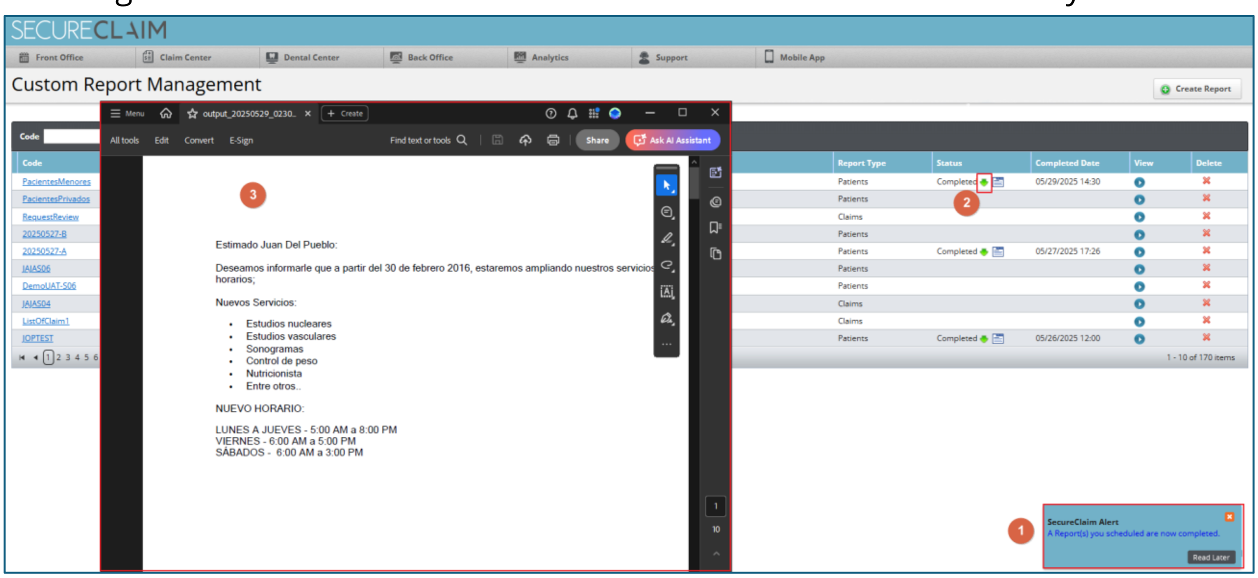


If you want to generate a bulk report for your patients, such as a billing letter, select the corresponding template in the **Templates** field and then click the **Send to Queue** button.
The system will notify the user that the report has been sent to the print queue for processing and generation.



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.

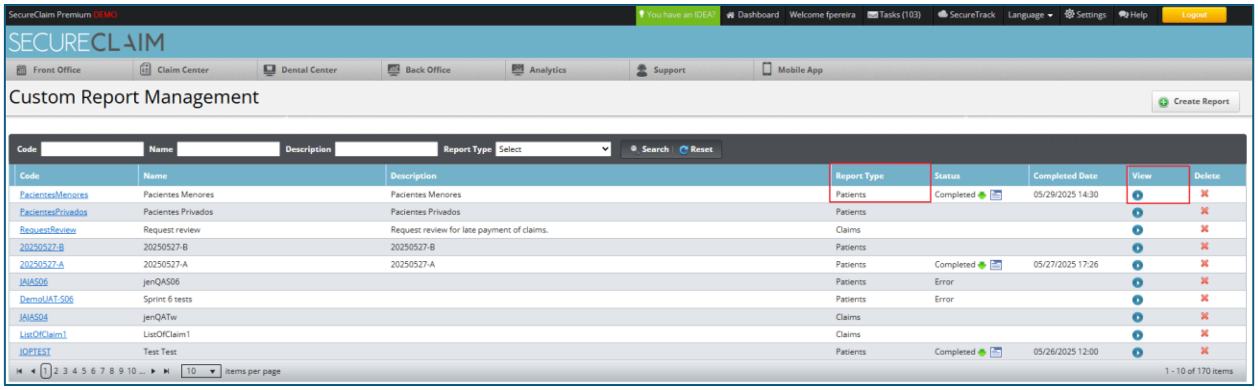
On the Custom Report Management screen, you will be able to see the report with the status **Completed**. From there, you can download it by clicking the button with the green arrow icon and save it to your PC.



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.



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.