Introduction

CPSI has developed the Report Writer application to allow users enhanced reporting capabilities when extracting data out of the system. The Report Writer application gives the User the ability to sort, filter and manipulate data thru advanced options allowing them to customize their reports. Users also have the ability to save reports in various formats, such as HTML or CSV, for additional reporting capabilities.

Several existing reports have been converted to open within the Report Writer application. Also, several new reports have been developed for use with the application. The following information pertains to the various options available when using the Report Writer application to run reports within the CPSI system.

Accessing the Report Writer Application

There are two ways to access the Report Writer Application. Report Writer may be accessed by selecting a pre-existing report that has been converted specifically for the application and then taking the normal path. For example: select Print Reports from the Hospital Base Menu or Master Selection Screen, select Insurance, select Billed but Unpaid by Insurance, select a print option, Report Writer will display. Report Writer may also be accessed for new reports: from the Hospital Base Menu select Other Applications and Functions, select Word Processing, select Ad Hoc Reporting, select Report Dashboard.

Report Writer

The Report Writer application allows users enhanced reporting capabilities when extracting data out of the system. There are several options available to sort, manipulate and extract data through the Report Writer application.

Advanced

The Advanced option allows the User to filter through various data elements used within the report. Once a report is selected within the Report Writer application, the Advanced option will appear at the bottom of the screen.

Select **Hospital Base Menu > Print Reports > Insurance >** **Billed But Unpaid Claims (by Ins)**
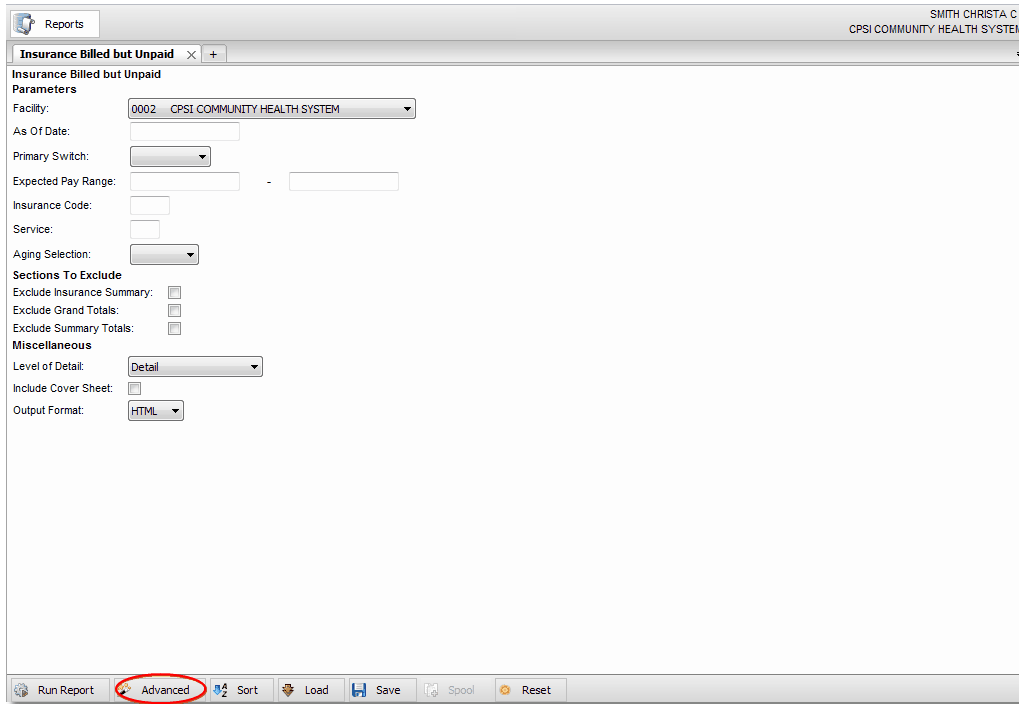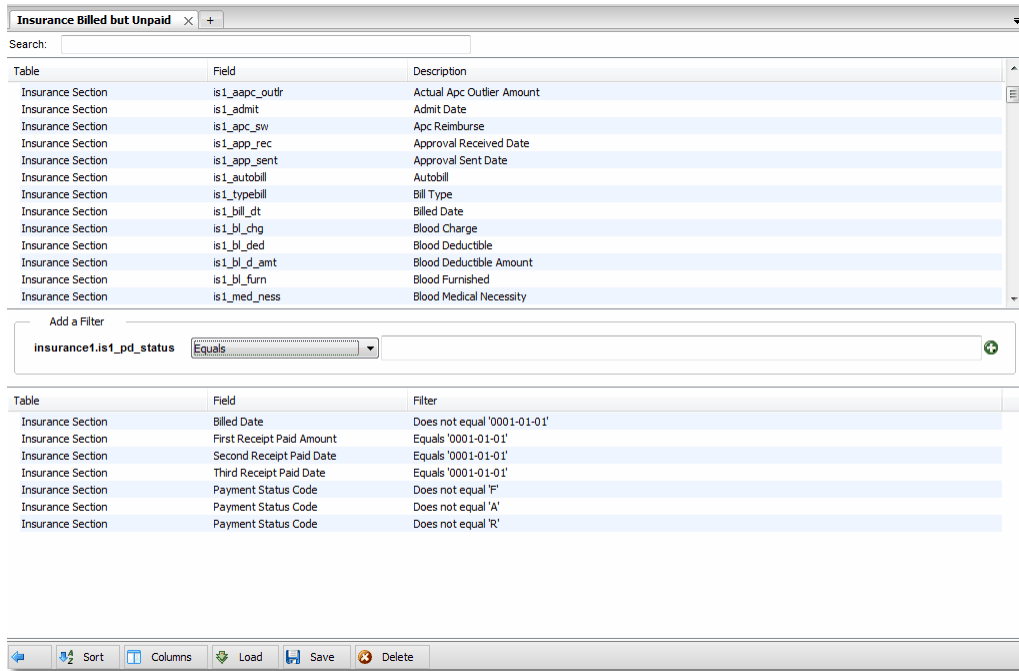
Figure 1.1 Report Template

Once selected, the Advanced options will display.

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Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > <u>Advanced</u>**
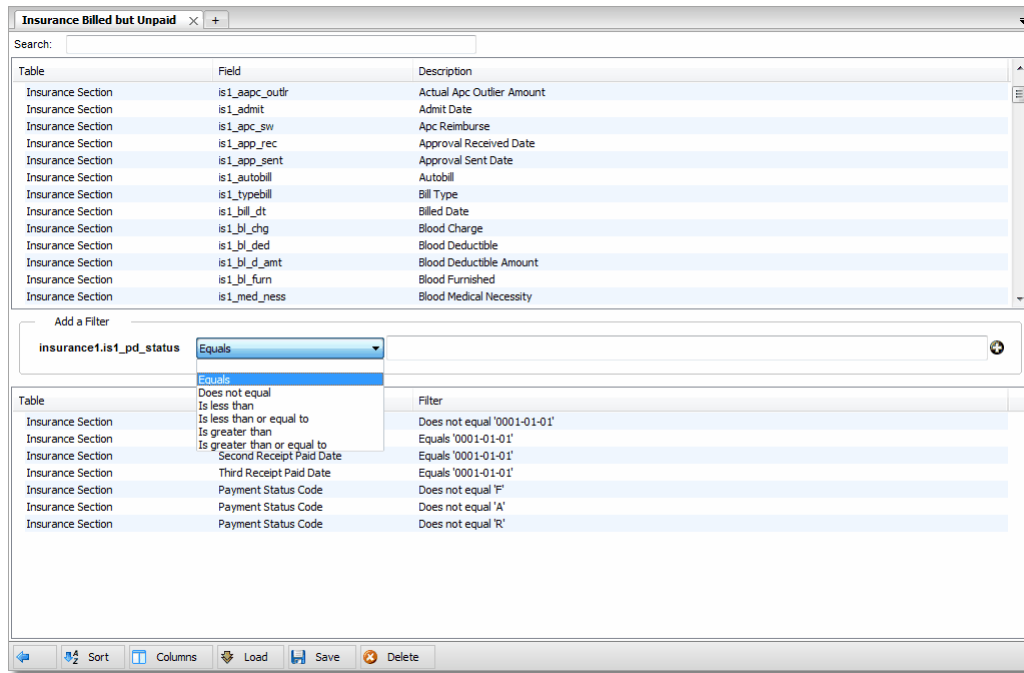

Figure 1.2 Advanced

The system will prompt "Search by:". Select Description, Field or Table from the drop down menu to choose the kind of data to search for. Enter the Description, Field or Table name under the "Search:" option. This data will be used in the calculation of the report.

Once the data has been chosen, use the "select a field" option to manipulate that information.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > Advanced**

Figure 1.3 Advanced - Add a Filter

There are four basic commands that may be used to filter the fields selected so that only the desired data is kept. They are as follows:

- Equal To

- Not Equal To

- Less Than or Equal To

- Greater Than or Equal To

Once a filter command is chosen, enter the value to be filtered against in the space next to the command and select the **green plus icon** to add this to the report calculation. For example, if a report is desired with no Inpatients then "Stay Type" would be selected from the available descriptions, the "!=" command would be selected and a value of "1" would be placed in the space next to the command. This parameter would then be used in the report calculations so that no Inpatient stay types would display.

For instructions on how to save these Parameters see the Save Parameters [9] section.

Sort

The Sort option may be used to manipulate the order in which information displays on the report.

Select **Hospital Base Menu > Print Reports > Insurance >** **Billed But Unpaid Claims (by Ins)**
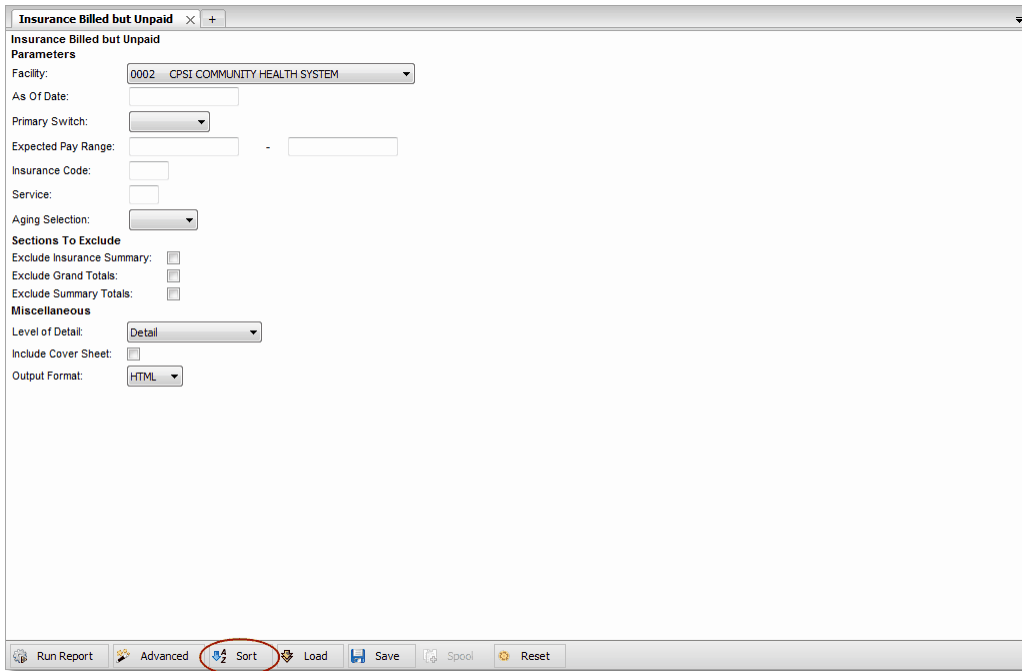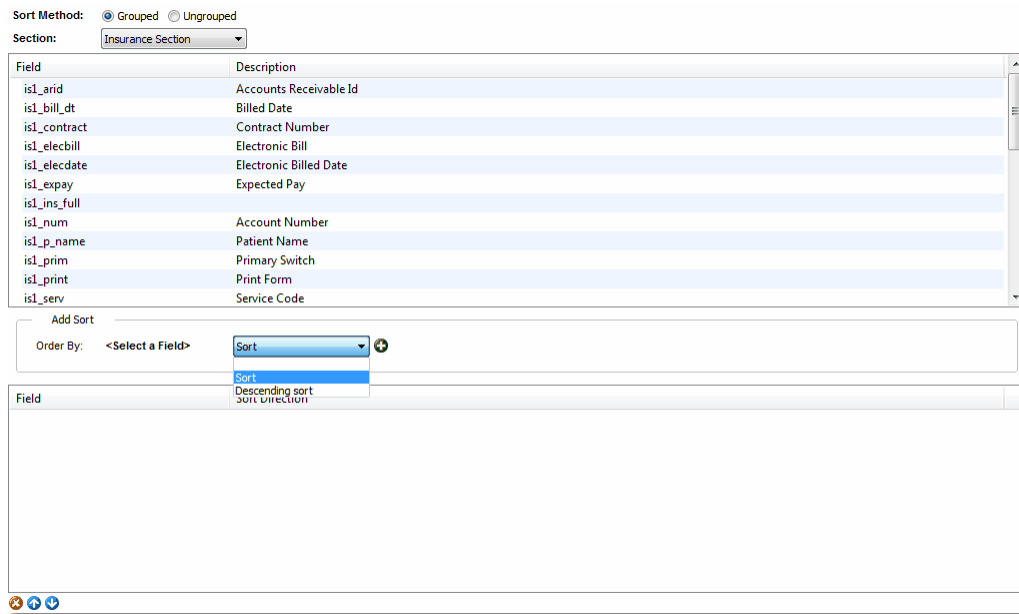

Figure 1.4 Sort

Once selected the Sort options will display.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > <u>Sort</u>**

Figure 1.5 Sort

Select the "Grouped" sort method to arrange the fields and descriptions by available sections. Selecting the "Ungrouped" sort method will arrange the list in the order that the system looks to the fields.
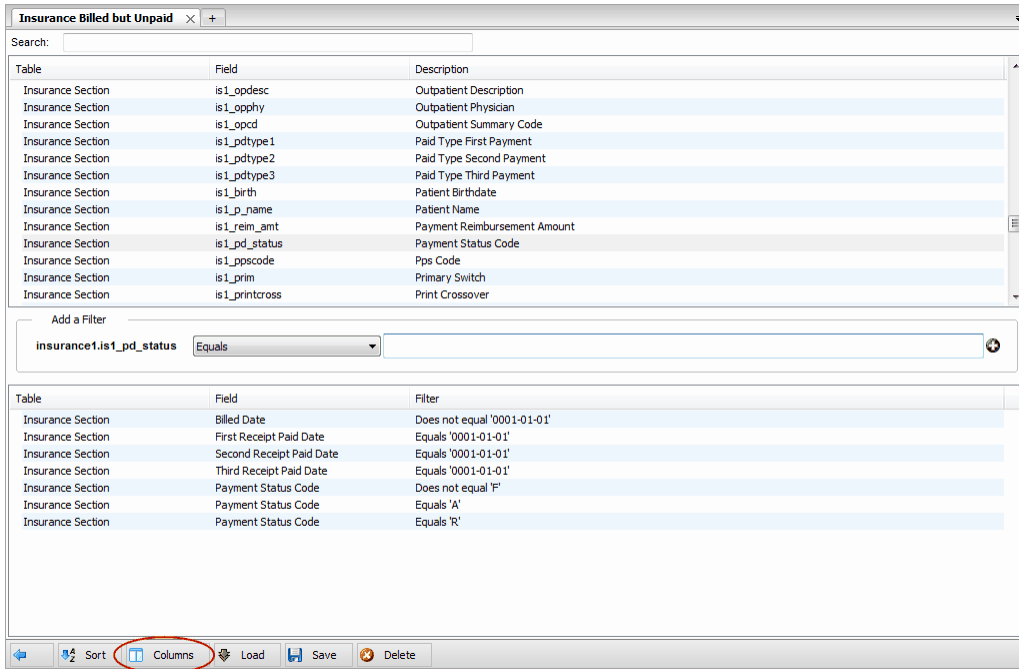
Select the description of the field that will be used to manipulate the order of the report. Once selected, the field name will pull next to the "Order By:" prompt. Choose **Sort** or **Descending Sort** from the drop-down menu, and select the   green plus icon to add this selection to the bottom window. Continue until all desired sort methods have been chosen.

Select a chosen field from the bottom window and use the   **arrow** icons to change the order in which they appear. Chose the **red**   icon to delete a selected field from the bottom window.

<u>Columns</u>

The Columns option allows the User to customize what columns within a report will pull to a CSV (excel) output format.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > <u>Advanced</u>**

Figure 1.6 Advanced

The Columns options will then display.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > Advanced > <u>Columns</u>**
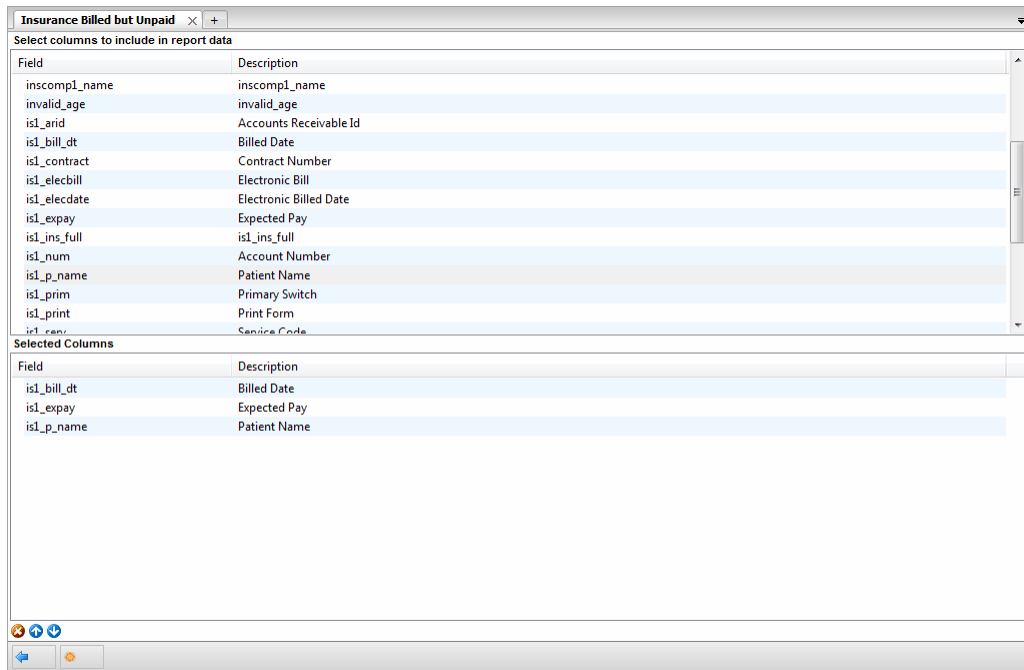

Figure 1.7 Columns

Double-click on the field or description of the desired Column to pull it to the Selected Columns window. Continue selecting until all desired Column headings have been chosen.

Select a chosen Column from the bottom window and use the arrow icons to change the order in which they appear. Chose the red icon to delete a selected Column from the bottom window.

Save Parameters

The Save Parameters option allows the User to save sort and filter criteria for future use.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > <u>Save Parameters</u>**
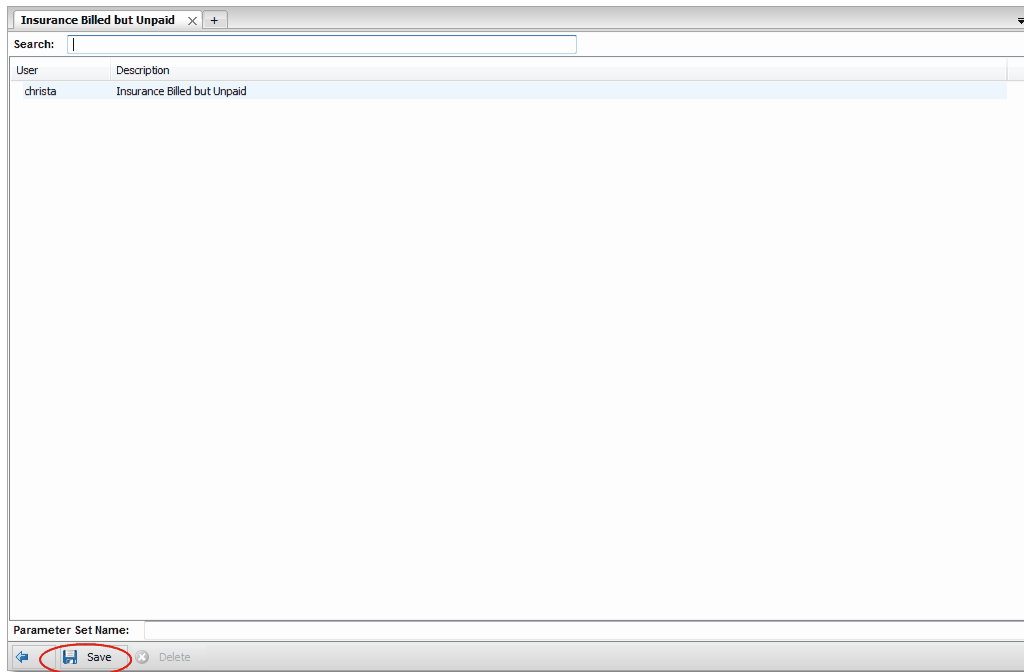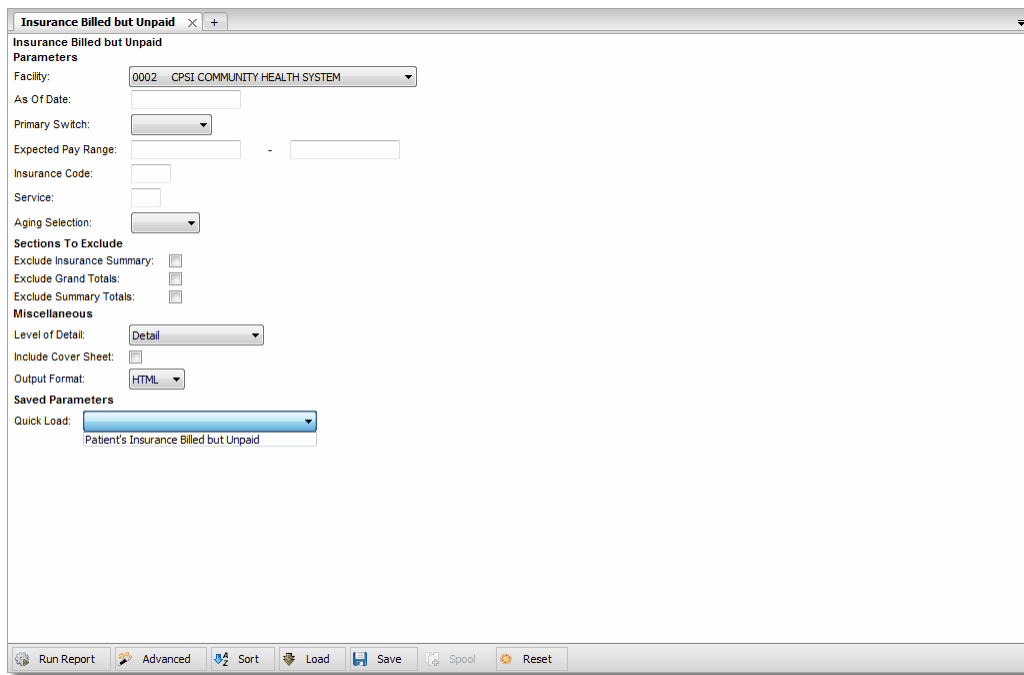

Figure 1.8 Save Parameters

The user accesses the **Parameter Set Name:** field. Enter the name the parameters will be saved. Select the Save icon to save the Parameter Set.

Once Parameters are saved they will appear on the initial report screen for available selection.

CPSI EMR System **Report Writer**

Select **Hospital Base Menu > Print Reports > Insurance >** **Billed But Unpaid Claims (by Ins)**

Figure 1.9 Report Template

The system prompts "Quick Load:". Choose the desired saved parameters from the drop-down menu.

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Load Parameters

The Load Parameters option allows previously saved parameters to be used.

Select **Hospital Base Menu > Print Reports > Insurance > Billed But Unpaid Claims (by Ins) > Load Parameters**
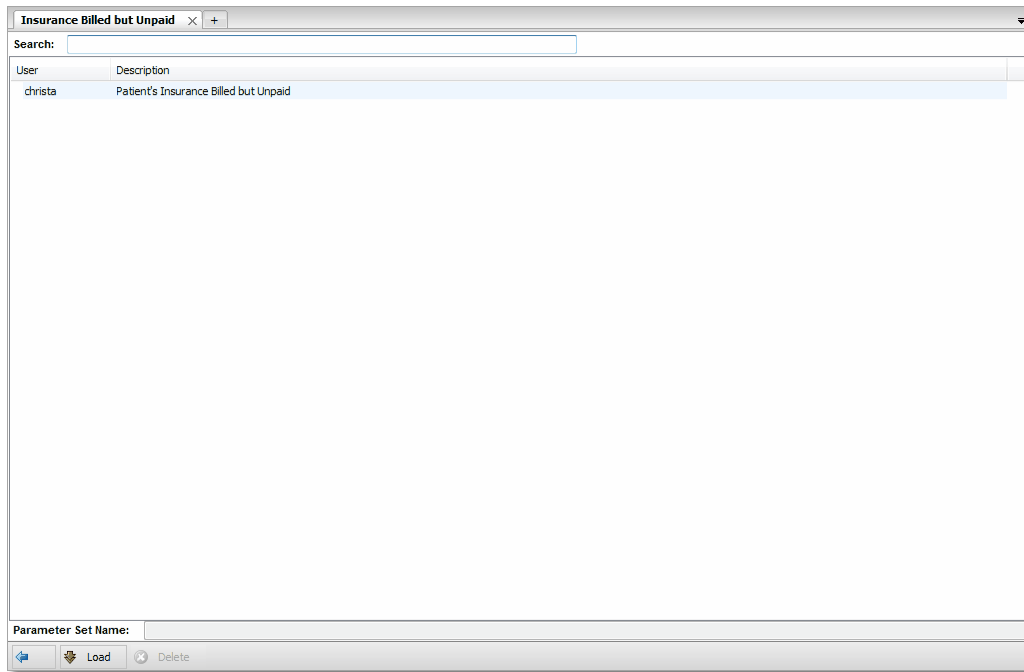

Figure 1.10 Load Parameters

Double-click the saved Parameter Set to select or highlight the desired Parameter set and chose the **Load** icon at the bottom of the page.

Report Dashboard

The Report Dashboard allows users to select from available reports and store them for use within the Report Writer application. The Dashboard will hold reports specific to that User Based Login.

Add Report

Select **Hospital Base Menu > Other Applications and Functions > Word Processing > Ad Hoc Report > Report Dashboard**
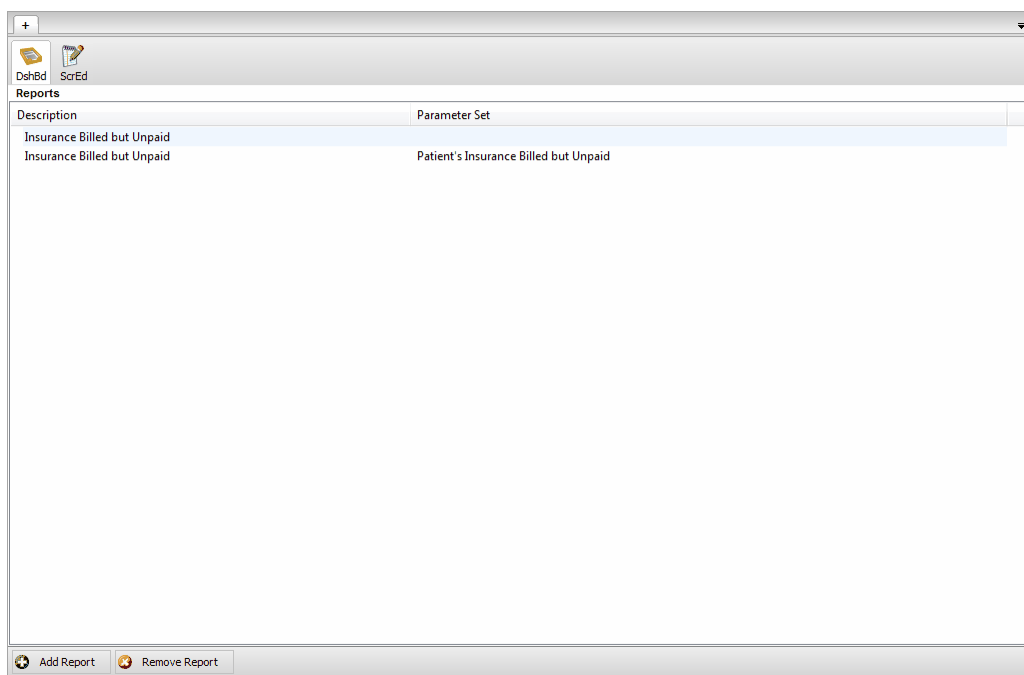

Figure 1.11 Report Dashboard

Select the green plus icon to Add Report. Once selected, a list of available reports will display. If a report needs to be removed from the Dashboard select the red icon.

NOTE: When adding a report, the system will prompt for the current application password for the application the report is associated. For instance, if it is a Payroll report, the system will prompt for the Payroll password.

Select **Hospital Base Menu > Other Applications and Functions > Word Processing > Ad Hoc Report > Report Dashboard > Add Report**
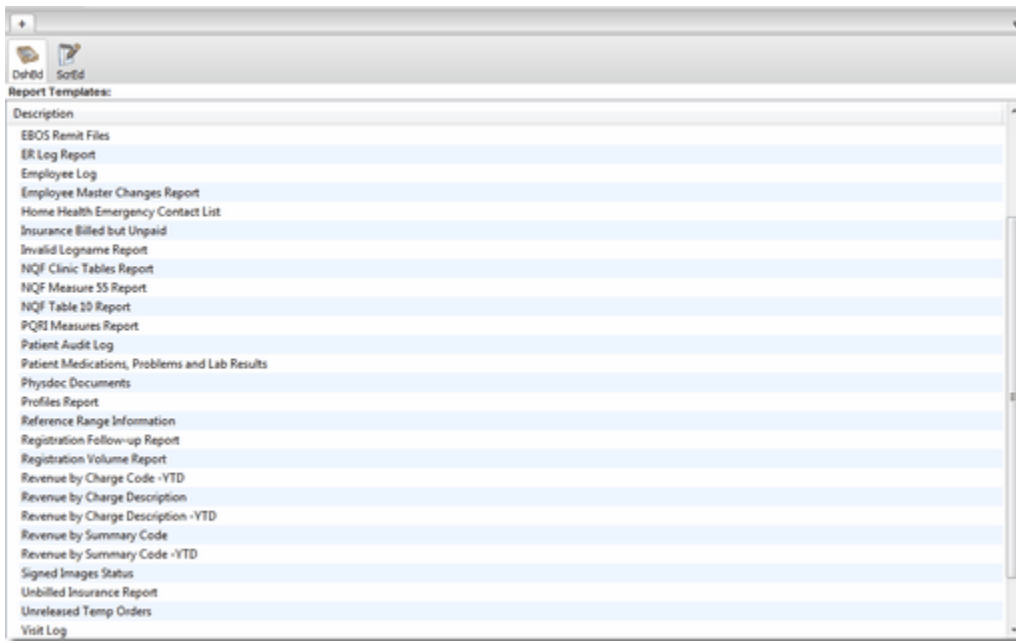

Figure 1.12 Report Dashboard

Select the desired report from the available templates. Double-click to add to the dashboard or highlight and choose the **Select** Select icon to add.

Once a report has been added, it will be available for selection each time the User accesses the Dashboard. Reports that have been added for selection will also display with each saved parameter that has been created by that User. See the Save Parameters [9] section for more information.

Online Presentations

This section lists hyperlinks to online presentations that are applicable for this document. They are not intended to replace the document but are to be used in conjunction to enhance the process and/or procedures related to this application.

Report Writer