

Future orders will be canceled automatically if not completed within 395 days. To prevent this from occurring without knowledge of patient care team, the Order Reconciliation Report can be run by physician practice staff using the Reporting Portal. This report will show outstanding orders in Future Order or Ordered status with the Order Start dates and dates. This information will enable staff to identify orders that haven't already been scheduled and/or are about to be canceled, so they may be managed appropriately.

## **Opening the Reporting Portal**

The Reporting Portal can be accessed from within PowerChart and FirstNet. It is also available in the AppBar, which is used by certain office staff, nursing, and leadership personnel.

- PowerChart & FirstNet
- **<u>STEP 1</u>**: Sign into **PowerChart** or **FirstNet**.
- **<u>STEP 2</u>**: Find and click **Reporting Portal** Reporting Portal in the toolbar at the top of the window.
- **<u>STEP 3</u>**: Enter **Username** and **Password** at the prompt.

## > AppBar

- **<u>STEP 1</u>**: Sign into **AppBar**.
- **<u>STEP 2</u>**: Find and click **Reporting Portal**.
- **<u>NOTE</u>**: If the Reporting Portal button is not already on the AppBar, follow these steps to add it:

- 1. Click the AppBar 🕅 button.
- 2. Select Customize.
- 3. Click to select the Buttons tab.
- 4. Place a checkmark beside Discern Reporting Portal.
- 5. Click OK.

## Finding and Running the Report for the First Time

- Finding the Order Reconciliation Report
- **<u>STEP 1</u>**: In the **Filters** column under **Categories**, select **Provider/Orders** checkbox.
- **<u>STEP 2</u>**: Scroll to find and click one time on the **Order Reconciliation Report**.
- <u>NOTE</u>: Search field in the upper right can be used to search Order Reconciliation Report instead of scrolling.

**<u>STEP 3</u>**: Select the **star** icon to the right to save this report to **Favorites**. The star will become yellow, and the report will be listed in the **My Favorites** tab.

Running the Order Reconciliation Report

- **<u>STEP 1</u>:** Click **Run**.
- **<u>STEP 2</u>**: Follow the prompts in the **Prompt Screen** as applicable to practice by selecting:
  - Facility
  - Location
  - **Provider(s)** may select **Selected Office Affiliated Providers** for all providers or individually select provider(s) as needed.
  - Start/End dates
  - Catalog Type
- **STEP 3:** Click **Execute**.
- **<u>NOTE</u>**: It is recommended that the contents of the report be copied and pasted into an excel spreadsheet which allows for better filtering options and saving to a local desktop or file folder. Click <u>here</u> for flyer assistance.

scription:	Suggested Report User:	Run
	Suggested Report Frequency:	Run in Background
	Support Reference Numbe 46363	View Previous Run
Discern Prompt: E0	5Z_OUTSTANDING_ORDE	RS:DBA – 🗆
Output to File/Printer/MINE	MINE	- B
*Facility	EMMC FAMILY MEDICINE - HAN	IPDEN 🗸
*Location	EMMC Family Medicine - Han	npden
Provider	Selected Office Affiliated Prov AARONSON CRNA, STEPH, AASMAA, SIRIKE T ABBOTT DO, CHRISTOPHE ABBOTT LCSW, MARINAA ABBOTT LCSW, MARINAA ABBOTT MD, MEGAN M ABDELSALAW MD, HAITHM ABED ELNOOR MD, AHMAD ABESH DO, DANIEL C ABIS, LEOPOLDO	viders
		>
*Start Date	10/01/2018	÷ v
*End Date	12/31/2018	÷ ¥
*Catalog Type	Any (*) Ambulatory Orders Imaging Services Laboratory Referral	
Return to prompts on close	Execute of output	Cancel

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.