
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

STEP 1: Sign into **PowerChart** or **FirstNet**.

STEP 2: Find and click **Reporting Portal**  in the toolbar at the top of the window.

STEP 3: Enter **Username** and **Password** at the prompt.


➤ AppBar

STEP 1: Sign into **AppBar**.



STEP 2: Find and click **Reporting Portal**.

NOTE: 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

STEP 1: In the **Filters** column under **Categories**, select **Provider/Orders** checkbox.

STEP 2: Scroll to find and click one time on the **Order Reconciliation Report**.

<p>NOTE: Search field in the upper right can be used to search Order Reconciliation Report instead of scrolling.</p>

STEP 3: 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**

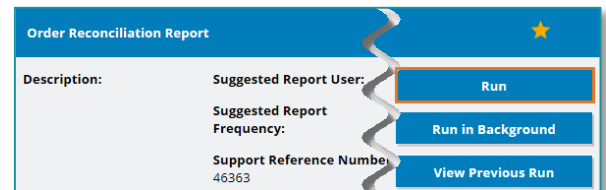
STEP 1: Click **Run**.

STEP 2: Follow the prompts in the **Prompt Screen** as applicable to practice by selecting:

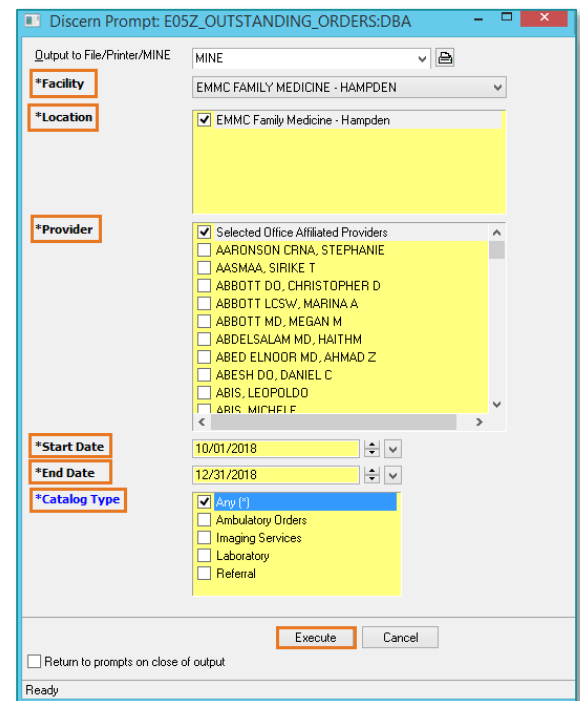
- **Facility**
- **Location**
- **Provider(s)** – may select **Selected Office Affiliated Providers** for all providers or individually select provider(s) as needed.
- **Start/End dates**
- **Catalog Type**

STEP 3: Click **Execute**.

NOTE: 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 [here](#) for flyer assistance.



The interface shows a header 'Order Reconciliation Report' with a yellow star icon. Below it, there are three buttons: 'Run', 'Run in Background', and 'View Previous Run'. The 'Run' button is highlighted with a red border.



The interface is titled 'Discern Prompt: E05Z_OUTSTANDING_ORDERS:DBA'. It has several sections for selection: 'Output to File/Printer/MINE' (set to MINE), '*Facility' (EMMC FAMILY MEDICINE - HAMPDEN), '*Location' (EMMC Family Medicine - Hampden), '*Provider' (Selected Office Affiliated Providers), '*Start Date' (10/01/2018), '*End Date' (12/31/2018), and '*Catalog Type' (Any [*]). There are 'Execute' and 'Cancel' buttons at the bottom. A checkbox 'Return to prompts on close of output' is also present.