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** [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 [A+] 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**.

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

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.

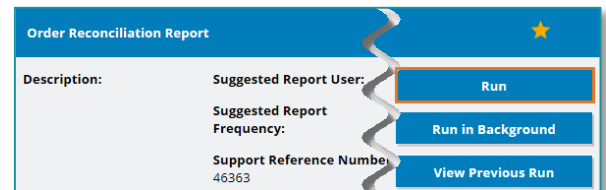➢ **Running the Order Reconciliation Report**

STEP 1: Click **Run**.

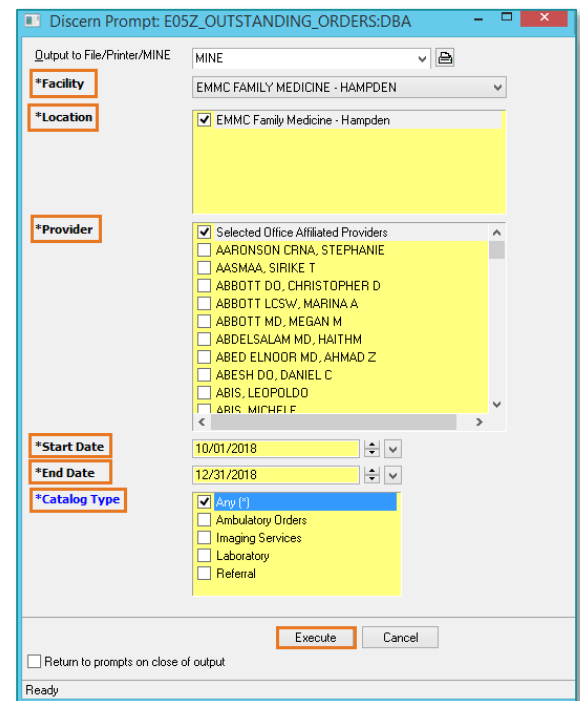**STEP 2:** Follow the prompts in the **Prompt Screen** as applicable to practice by selecting:

- **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.**