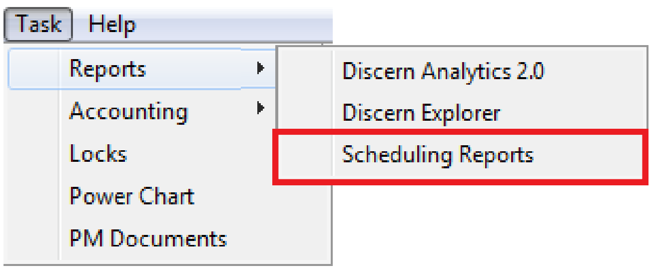
Practice Management Job Aid - Practice Management Clerk

Reporting

Access Schedule Report

You can run multiple Revenue Cycle reports from Schedule Report. This can be accessed from the Task menu in your workflow view.

1. Log in to **Revenue Cycle**.
2. Select the **Task** menu at the top of your screen.
3. Select **Reports**… **Scheduling Reports**.

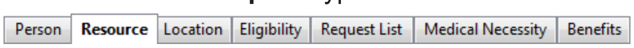


The Schedule Report window is displayed.

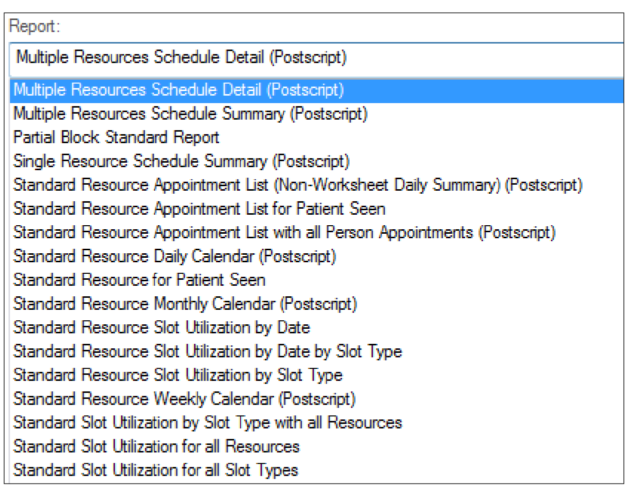
Run a Report

There are numerous reports that can be run from Schedule Report. You can also customize the report by selecting the Appointment Type, Resource Group, and date and time parameters

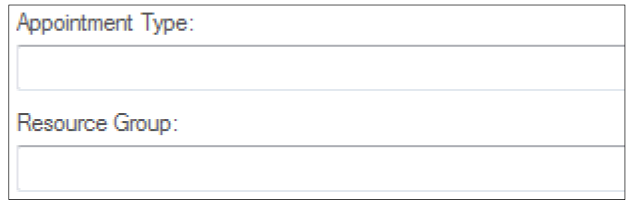
1. Open **Schedule Report**.
2. Select one of the **Report** Type tabs.



3. Click the **Report** down arrow and select a report.

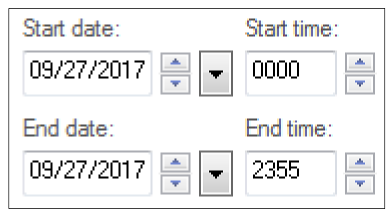


4. Enter an **Appointment Type** and a **Resource Group** (if needed).

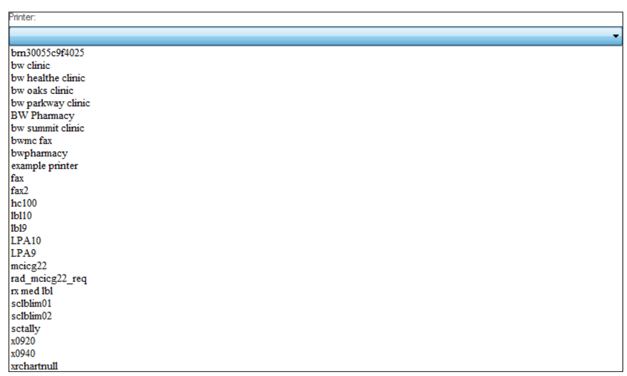


Note: You can enter a partial Appointment Type and/or Resource Group and then use the Resource Group Help ... button at the end of each field to search for Resource Groups matching the criteria entered.

5. Enter the appropriate **Date and Time** information.



6. If printing the report, click the **Printer** down arrow and select the appropriate printer.



7. Select the appropriate number of **Copies**.

8. Choose one of the buttons at the bottom of the Schedule Report window to **E-mail**, **Print**, **Save**, **View**, **Clear**, or **Close** the report.