

EPIC TRAINING



Reporting Quick Start Guide

HOUSTON
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LEADING MEDICINE



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Accessing Reporting Content

Overview of Dashboards

Dashboards centralize information you need throughout your day and are the primary method of reporting content distribution. Instead of going to multiple screens to run reports, view your schedule and access your In-Basket messages, you can see all this information on your collection of dashboards.

Your default favorite **Radar** dashboard appears when you log in and toggle to the **My Dashboards** activity.

You can access other available dashboards by clicking the name of the dashboard, such as **Nurse Manager Learning Home**, and selecting another favorited dashboard. If you want to search for additional dashboards, type the name of the dashboard in the **search bar** or click **Show Catalog** to browse the full list.



Favorite dashboards for easy access later. To make a favorited dashboard your default dashboard, drag it to the top of the list.



You can also access the **My Dashboards** activity directly from Willow Ambulatory by using the Epic button, which lets you view pharmacy metrics and training materials without having to log in to Epic.

Note: If you want to personalize or edit components on a dashboard, you will still need to log in to Epic.

Overview of Reporting Content

Your reports and other reporting content can be accessed through your available dashboards, the **Analytics Catalog** or **My Reports**.

When you run a report from a dashboard component, the results are shown directly in that component. You can take additional action on the results, which is covered in another section of this guide.

The **Analytics Catalog** is a database of available reports and dashboards that links directly from your dashboards. You can quickly access your favorite content and search for new content. When you run a report from the **Catalog**, the results are shown in the **My Reports** activity.



My Reports can be accessed via **Chart Search** and gives you quick access to your favorite reports and saved results. You can also view the statuses of recently run reports and reopen their results.

Accessing Reporting Content

Take action from a dashboard component

Your dashboard should give you quick access to all the reports you commonly run. If a report you run frequently isn't on your dashboard, you can add it.

Your reports appear on your dashboard in **Favorite Reports** or in a link. **Favorite Reports** is populated with the reports that you added to your favorites from the **Catalog**. **Link** often contains links to reports or activities that are useful for a specific aspect of your job.

You can also take action from a specific component.

- **View Report:** Jump to the corresponding report in **Reporting Workbench**.
- **Options:** Personalize and view help text.
- **Collapse:** Temporarily hide.

Find and run reports from the Catalog

1. In **My Reports**, go to the **Search Library** tab.
2. Search for the topic of the report. For example, if you want a report to find patients with diabetes, enter "diabetic visit."
3. Apply filters to limit your search results.
 - At the top, limit to reports you own, reports you ran or reports you're subscribed to.
 - **Types & Groups:** Search by reporting subject area and audience.
 - **Template Type:** Search by content type. Types include workbench or **Crystal** reports.
 - **Tags:** Search by tag.
 - Click **Clear Filters** to remove the filters.
4. Select a report.
 - Click **Run** to run the report with the current settings.
 - Click **☆** to add the report to your **Favorites list** in the **Catalog**, **My Reports** and favorited report for easy access later.
 - Click **Edit** to change the report's settings. You can then run the report with your edited settings or save it as a new, private report.
 - Click **Details** to view additional details about the report.



Navigate Dashboards

Toggle Between Dashboards

The first dashboard you see when you toggle to **My Dashboards** is your primary dashboard. Depending on your reporting needs, there might be several dashboards you need to regularly access. To toggle to a different dashboard, simply click on the current dashboard name and select a new dashboard.

Switch to a favorited dashboard

Your commonly used dashboards should be favorited for easy access. You can favorite individual dashboards or a group of related dashboards, called redirectors, by clicking the **star** next to the name.

Search for and switch to a new dashboard

If you need a dashboard that isn't favorited or simply want to browse the available reporting content, you can search for dashboards in the **Analytics Catalog**.

1. Click on the current dashboard name and then **Show Catalog**.
2. Enter a search term. Filter results by a content type of **Dashboards**.
3. Hover over a dashboard and click to view more details about the record.
4. If appropriate, click **Open**.
 - You can also hover over a dashboard and click without viewing the record details.



If you plan on needing this dashboard again in the future, hover and click to favorite a dashboard for easy access later.





Organize the Dashboard

Organize your report lists in the Link component

1. Hover over the **Link** component and click then **Personalize**.
2. Drag a report to where you want it to appear in the list, and then accept.





Add and organize components on the dashboard

1. Click  and select  **Dashboard Settings**.
2. Drag a component to where you want it to appear in the dashboard.
3. Click  **Add Component** to add a component from the **Catalog**.
4. When finished making changes, click  **Accept**.


Add Reports to Your Dashboard

Your dashboard gives you quick access to all the reports you commonly run. If a report you run frequently isn't on your dashboard, you can add it directly to a component. **Note:** Only **Link** components will let you add reports.

1. Click  and select  **Personalize**.
2. Select **Report** in the **Add item** field.
3. Search for a report by topic.
4. Select a report and add the report to the component.
 - Drag and drop to move the report to where you want it to appear in the list.
5. **Accept** again to save your changes.

Add Benchmarks to Your Dashboard

Check how HM stacks up against other Epic organizations by reviewing benchmarking data right on your dashboard.

1. Open a dashboard that shows key performance metrics for your organization.
2. Click  and select **Show Benchmarks**. Benchmarking data appears on your dashboard.
 - If no benchmarking data appears, the dashboard doesn't have any available benchmarks. Repeat step 1 with a different dashboard.
3. To see benchmarking data for a different group of organizations, edit the **Peer Group** parameter on the dashboard and select a peer group. A peer group is a set of organizations with some similarity, such as their region or specialty. For example, select the **Pediatric** peer group to compare your data against data from pediatric organizations.
4. To modify the percentiles that appear for benchmarking data on your dashboard, edit the **Statistic** parameter. For example, you can include information about how the top fifth percentile of organizations are performing for a particular peer group.




To view only your organization's data, click  and select **Hide Benchmarks**.



View SlicerDicer Data on Your Dashboard


Add SlicerDicer data

1. On your dashboard, click  and select **Create Component**.
2. Select the data model you want to see data for.
3. Create or load a session that meets your needs.
4. When the query is completed, click **Create Component**.
5. In the **Create Component** window:
 - Optionally modify the display name for your component in the **Name** field.
 - Enter the date range that data should appear for. You can enter either fixed or dynamic dates.
 - If you included top or bottom slices in your query and don't want the top or bottom slices to be recalculated when you load a dashboard, clear the **Slice Config** check box.
6. Click **Add to Dashboard**.

Modify SlicerDicer data






When you make changes to a SlicerDicer session in an existing component, you can save your changes in the component only if you created the original SlicerDicer session. When you modify a session you own, the session is updated for any users you shared the session with. If you didn't create the session you're modifying, you can save your changes to a new component.

1. Next to the SlicerDicer data you want to modify on your dashboard, click .
2. Modify the SlicerDicer query to meet your needs. For example, you might:
 - Select a different visualization.
 - Modify or add new measures.
 - Modify the slices that appear.
3. If you want to show your modified query in a new component, click **Create Component**.
4. If you created the original session and want to overwrite your existing component with your changes, click **Save**.





Personalize Your Dashboard

1. On your dashboard, click , choose  **Dashboard Settings**, and enter a new **Display** title on the **Layout** tab.
2. Click  next to a component to change its name, color and display settings.
3. **Accept** when you're finished editing a component and save your changes.

Access In Basket messages

You can directly access your **In Basket** from a dashboard. Your **In Basket Glance** component contains a summary of your **In Basket** folders and unread emails. Clicking a folder brings you directly to that folder in **In Basket**.

Create Your Own Dashboard

1. In **My Dashboards**, click  and select **Create Dashboard**.
2. Enter a title for your dashboard and click **Accept**.
3. Add your first component to your dashboard.
 - Click **Search the Catalog** to find existing content in the **Analytics Catalog** that you want to include. Look for a content type of **Component**.
 - Click **Create with SlicerDicer** to create a component based on data in a SlicerDicer session. You can add an existing SlicerDicer session to your dashboard or create a new one.
4. After you add one component, you can include additional existing components from the **Analytics Catalog** or create SlicerDicer components by clicking  and selecting **Create Component**.

Run Key Reports

Run Reports from Dashboards

Dashboards contain the most heavily used reports for your day-to-day operations. Some reports are directly embedded in your dashboard and display results in a table or graph. Simply click to run the report. Other reports are listed in **Link** components and act as shortcuts to the report. Depending on the report type, you can click to directly jump into the report, or click to request the report to be run. When results are ready to view, you can click again to open the results.






Run Reports from the Analytics Catalog

The **Catalog** is a database of available reports and dashboards. You can search for, modify and run reports directly from the **Catalog**.

Access the Catalog






- From My Dashboards, click on a dashboard name, and then click **Show Catalog**.
- From anywhere else in the chart, use **Chart Search** to open the **Analytics Catalog**.

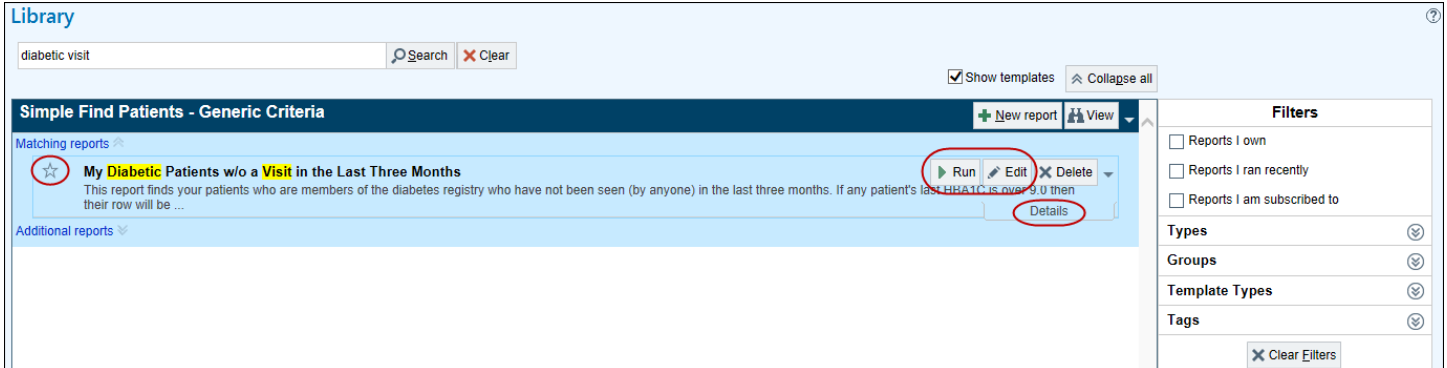
Run a report from the Catalog

1. Search for a report by name or topic. You can filter results by favorites, content type and tags.
2. Hover over a report and click  to view more details about the record.
3. If appropriate, click  **Open**.
 - You can also hover over a dashboard and click  without viewing the record details.

Run Reports from the My Reports Activity

The **My Reports** activity is a collection of all **Reporting Workbench** reports and templates, as well as a record of recently run reports and saved results.

1. In **My Reports**, go to the **Search Library** tab.
2. Search for the topic of the report. For example, if you want a report to find patients with diabetes, enter "diabetic visit."
3. Apply filters to limit your search results.
 - At the top, limit to reports you own, reports you ran or reports you're subscribed to.
 - **Types & Groups:** Search by reporting subject area and audience.
 - **Template Type:** Search by content type. Types include workbench or **Crystal** reports.
 - **Tags:** Search by tag.
 - Click  **Clear Filters** to remove the filters.
4. Select a report.
 - Click  **Run** to run the report with the current settings.
 - Click  to add the report to your **Favorites** list in the **Catalog**, **My Reports** and favorited report component for easy access later.
 - Click  **Edit** to change the report's settings. You can then run the report with your edited settings or save it as a new, private report.
 - Click  **Details** to view additional details about the report.




Request Crystal Reports

Epic **Crystal** reports are run by batch job on a set schedule. Instead of running a report at any time, you must request the report. **Crystal** reports are indicated by the label below them, which also designates their availability.

1. From the **Catalog** or **My Reports**, search for a report and open the report.
2. Request the report.
 - a. It might take a while for the report to be ready. You can monitor the status in the **Recent Results** section of the **My Reports** activity.
3. When the report is ready, click to view the results.



Rerun a Report to Get Updated Results


You can't rerun some reports until their results expire, regardless of whether you're accessing the report from a dashboard or from **My Reports**. This limit is set because if too many reports are running, the system slows down. If you click  **Run** for a report you've already run, you see the results from the last time you ran the report.

To get updated results, you must wait for the system to reset the report. You know a report is ready to run again when:

- The status of a report on a dashboard changes to **Ready to run**.
- The **Valid Until** time listed in the **Recent Results** section for a report in **My Reports** has passed and the results are listed as **Expired**.

Receive Notice When Report Results are Ready

Reports that gather a lot of data can take a long time to run. Before running a report, you can tell the system to send you an **In Basket** message when the results are ready, so you can do other work while the report runs.



1. In either **My Reports** or **Catalog**, select the report you want to run and click  **Edit**.
2. On the **General** tab, scroll down to the **User Notification** section.
3. Next to **Send me an In Basket notification...** select **Yes**.
4. When you run this report, you'll receive a **Reporting Workbench In Basket message** when the results are ready. Click the link in the message to open the report's results.

Save a Report's Results

The results of a report are valid only for a set amount of time. In **My Reports**, check the **Status** column in the **Recent Results** section to see if the results are still valid. To see how long the results are available, look directly under the report's name.

After you run a report, you can save the results if you'll need to review them after they expire.

Saved report results appear in the **Saved Results** section of the **My Reports** tab. Saved report results have expiration dates, after which their information might no longer be relevant. The next time you open **My Reports** after the saved results have expired, a window appears where you can delete or resave the results.

1. From a report's results, click  **Options** and select  **Save Results**.
2. Fill out the details and accept to save the report.
3. View the report results in the **Saved Results** section.



Print a Report's Results

1. From a report's results, click **Print** on the Epic toolbar and select **Print List**.
2. Enter **Server Printer** in the **Destination** field and select your printer.
3. Select a **View** from the following options:
 - **Current View:** This option is only available if you made changes without saving. Selecting the view prints exactly what is on screen.
 - **Print Layout tab from Report Settings:** This option prints the layout specified on the **Print Layout** tab of **Report Settings**.
 - **Saved Views:** Any views you saved are options for print layouts. The default saved view is also the default print view.
 - **Display tab from Report Settings:** This option prints the layout specified on the **Display** tab of **Report Settings**.
4. Print the report.

Work with a Report's Results Outside of Epic

You can export the results of some reports as a .csv (comma separated values) or .tsv (tab separated values) file and import them into Microsoft Excel or another tool, if you need to display the data in a different way. For example, you can create a pivot table to better understand a report's results.

From a report's results, select **Options** > **Export to File**. The **Save As** window opens.

Email a Report's Results

Your recipient must have an Epic login to view an emailed report.

1. From a report's results, click **Options** > **Send E-mail**.
2. Fill out the message details.
3. To send the e-mail to a group of users, such as all nurses in your department, enter the group in the **Report Groups** field.
4. Accept to send the e-mail.

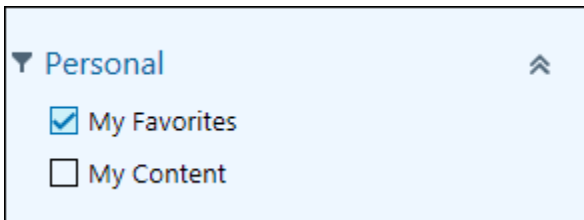
Organize Your Favorite Reports in My Reports

1. To create a folder, click **Create a new folder** in the **My Favorite Reports** section of the **My Reports** tab.
2. To move reports into your new folder, click to the left of the report name where appears.
3. Drag the report and drop it in the folder of your choice.



Organize Your Favorite Reports in the Analytics Catalog

1. Use **Chart Search** to open the **Analytics Catalog**.
2. Hover over a report and click ☆ in the upper-right corner to add it to your favorites.
3. In the **Catalog**, use the **Personal** filters to see only your favorites.



Modify Reports

Modify a Report's Criteria

You can change reports that don't meet your needs. For example, you might use a report that finds your patients with diabetes and high HbA1c results. You can change the report to find all patients with diabetes and high HbA1c results who were seen in your primary department and then save a new version of the report.

1. From **My Reports**, right click the report you want to change and select **Edit**. Or, in the **Catalog**, hover over a report and click ✎ in the upper right.
2. On the **Criteria** tab, use the **pencil** to change the search value or logic for any criterion.
3. Click the **trash can** to remove a criterion. If you don't see this icon, the criterion is required.
4. Click **Save As**, if you want to create a new version of the report, and then click **Run**.

Add Criteria to a Report's Search

Criteria determine what a report searches for and help you target specific patients in your results. The criteria available vary by report.


1. From the **Library**, right click the report you want to use and select **Edit**. Or, in the **Catalog**, hover over a report and click ✎ in the upper right.
2. On the **Criteria** tab, search for a criterion to include in the report. Enter a keyword or click **Search** to see all criteria.
3. Beneath your newly added criterion, enter what values the report should find. The available options depend on the criterion you selected.
4. To change the logic between values in a criterion, click **OR**, **AND** or **Custom** next to the criterion. The button name depends on the logic the criterion is currently using.




5. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Change a Report's Search Time Frame

In some reports, you can set a date range to control the time frame the report searches.


The date range applies only to criteria that change over time (these criteria are identified by this  icon).

For example, if you're searching for your male patients between January 1 and March 1, the date range is ignored because a patient's sex rarely changes. All of your patients appear in the results. If you add the criterion BMI > 30, the report uses the date range because BMI can change over time. The search results include only male patients who had a BMI greater than 30 between January 1 and March 1.


1. From **My Reports**, right click the report you want to change and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Click the **pencil** to specify the date range and in certain reports, the time range.
 - a. Enter a relative date using one of the following shortcuts: w=week, m=month, mb=beginning of the month, me=end of the month or y=year. You can also use an absolute date.
 - b. For example, enter "mb-3" to search for patients whose BMI was greater than 30 in the past three full months.
3. Click **Save As** if you want to save a new version of the report, and then click **Run**.




Remove Deceased Patients from a Report's Results

1. From **My Reports**, right click the report you want to run and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Search for the **Patient Living Status** criteria.
3. In the **Living Status** field, select a value of **Alive**.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Add a Column to a Report's Results to Show Additional Data




1. From **My Favorite Reports**, right click the report you want to use and then **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Select the **Display** tab.
 - All of the columns available for the report appear in the **Available Columns** list.
 - All of the columns that currently appear in the report are in the **Selected Columns** list.
3. Select a column from the **Available Columns** list and click the right arrow to move it to the **Selected Columns** list.
4. Click **Save As** if you want to create a new version of the report, and then run the report.

Remove a Column From a Report's Results

1. From **My Reports**, right click the report you want to use and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Select the **Display** tab. All of the columns that currently appear in the report are in the **Selected Columns** list.
3. Select a column from the **Selected Columns** list and click the **left arrow**.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.




Keep Columns in the Same Place

You can prevent **Reporting Workbench** columns from moving when you scroll by anchoring them in place in **Report Settings**.


1. From **My Reports**, right click the report you want to use and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. On the **Display** tab, change the number of columns anchored using the drop-down **Anchor** menu.
3. Move the colored **Anchor** divider in the **Selected Columns** list using the  and  arrows so that the columns you want anchored are above the divider.
4. Click **Save** to save the new anchor settings, and then click **Run**.




Change the Order of the Columns in a Report's Results

1. From **My Reports**, right click the report you want to use and click **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Select the **Display** tab and the column you want to move in the **Selected Columns** list.
3. Click  or  to move the column up or down. The first column in the list is the leftmost column in the report's results.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Change the Width of a Column in a Report's Results


1. From **My Reports**, select the report you want to use and click **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Select the **Display** tab and double-click a column in the **Selected Columns** list.
3. Enter the column width you want to use and click **Accept**.
 - Column width is measured in twips. To figure out how many twips to enter, compare the width of the column you want to change to the width of other columns.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Change the Color and Font in a Report's Results

1. From **My Reports**, select the report you want to use and click **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. On the **Appearance** tab, select **Set custom colors**.
3. Indicate whether you want to set the colors and fonts by rows or columns.
4. For each row or column you want to change, click in the associated field to change the text color, background color, or font type and size. Your changes appear in the preview below.
5. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Call Attention to Specific Values in a Report's Results

You can change a report's display so specific values in the results stand out. For example, when running a report to see all diabetic patients' recent A1C levels, you can have any level above 7 (abnormal) appear with a red background so you can quickly identify patients to check on.


1. From **My Reports**, right click the report you want to use and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. On the **Appearance** tab, under **Conditional Formatting**, click **Add Rule**.
3. Choose to apply your formatting to a single cell or the entire result row.
4. Set when this formatting should appear:



- a. In the **Column** field, select the column that contains the values you want to call out.
- b. Enter the logic you want to use in the **Operator** field.
- c. Enter what the system should look for in the **Value** field.
5. Choose from a **Preset** formatting option or create **Custom** formatting.
 - With custom formatting, you set the font type and size, font color and cell background color.
 - A sample visual of your formatting appears to the left.
6. **Accept** to save changes.
7. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Organize Action Buttons

You can remove and reorder the default buttons that appear on your toolbar.


1. From **My Reports**, right click the report you want to use and select **Edit**. Or, in the **Catalog**, hover over a report and click  in the upper right.
2. Select the **Toolbar** tab and use the **check boxes** to determine which buttons appear for that report.
3. Click the **arrows** on the right side of the screen to reorder the buttons.
4. Save your changes when finished.

Save a Modified Copy of a Report

If you change a report, you can save a private copy, so you don't have to make the changes each time you run the report. The copy of the report is available to view and run only by you.

If the **Save As** button isn't available in **Report Settings**, you need to change the report each time you want to run it with these settings. If you often make the same changes, ask your reporting team to create a new version of the report.

After you've created your own copy of a standard report, you can continue to change and save that copy. You don't need to keep making new copies of the same standard report.

1. Click **Edit** in the appropriate report and modify the report to meet your needs.
2. On the **General** tab, select **Public** or **Private** to determine who has access to your modified copy.
 - If you select **Private**, the report appears with this  icon in the **Library**.
3. Save your changes and return to the report.



Outpatient Pharmacy Reports

Top 5 Reports

RxAmb Fills Per Day

Pharmacy managers and administrators can use the **RxAmb Fills per Day** report to see how many fills pharmacy staff processed each day over the past week. Pharmacy managers can use this productivity measure to see when their pharmacy is busiest and make better informed staffing decisions.

The report displays the number of each day's fills both in table form and as a graph.

This report is built from the **Reporting Workbench Prescription Fills** report template.

RxAmb Controlled Substance Dispenses

Using this report, pharmacy staff can quickly view controlled substance dispenses for the last week. This report does not fulfill state reporting requirements and is for internal use only. This report can be run on the same schedule as the report sent to a state board of pharmacy, but it also can be run as often as needed.

The **Detail** tab lists clinical information, authorizing pharmacist, counseling user and patient name for all controlled substance dispenses from the past week. The **Summary** tab displays total dispenses and dispense quantity of each controlled substance.

This report is built from the **Reporting Workbench Prescription Fills** report template.

RxAmb Cash Price Overrides

Pharmacy users can use this report to investigate all cash price overrides at the pharmacy and identify any associated pricing build errors. The prompt correction of such errors can help improve the health and efficiency of HM.

The report shows a list of prescription fills from the last week with their NDC, insurance plan name, original and override price, acquisition cost and gross margin. When a medication is highlighted in the list, further details about the fill appear in the report pane below. A summary report shows cash price overrides grouped by NDC to make it clearer which NDCs might be most likely to contain build errors.

This report is built from the **Reporting Workbench Prescription Fills** report template.



RxAmb Weekly Fill Rejection Requests with User

This report helps pharmacy staff see which users are responsible for the rejected fills and the reason for the rejection. Use this information to provide users with additional training and monitoring to reduce the incidence of rejected fills.

For each rejected fill, the detail report shows the medication and prescription number, date and time of the fill, filing and rejecting user and reason for the rejection. The summary report shows the rejected fills broken down by user and then by reason for the rejection.

From the report, you can open the patient's chart for more information about the patient's condition and treatment or send a message to the patient about the prescription change.

This report is built from the **Reporting Workbench Prescription Actions** template.

RxAmb Transfers to External Pharmacies

Use this report to review prescriptions transferred to an external pharmacy over the past month and ensure that pharmacies are taking appropriate steps to retain prescriptions.

The report shows the patient, medication, transfer date, transfer quantity and other key details that you can use to investigate the cause of the transfer. The report also includes two summary views:

- **Transfers Per Pharmacy** – this summary view shows a list of all pharmacies at your organization and the number of external transfers that have originated from each of those pharmacies.
- **To Pharmacies** – this summary view shows the external pharmacies to which the prescriptions were transferred.

Use this report to identify trends in external transfers and evaluate whether new workflows or processes should be applied at specific pharmacies to improve prescription retention.

Financial Reports

RxAmb Daily Dispenses with Net Loss

Run this report daily to identify prescription fills that result in losses for the pharmacy. After finding prescriptions that result in losses, take the appropriate follow-up actions, including:

- Validating that the medication has the correct associated acquisition cost.
- Working with the payor to renegotiate medication reimbursement.
- Working with physicians so they write fewer prescriptions that result in losses.



You can see a list of prescribed medications that result in a net loss for the pharmacy. In addition, you can see associated information, such as:

- Payor
- Plan
- Prescription number
- NDC

Results are grouped by profit, so you can quickly see the largest losses at the top of the report. You can also review the fill's acquisition cost and reimbursement amount.

This report is built from the **Reporting Workbench Prescription Fills** report template.

RxAmb Daily Dispenses (Billing)

Track profits and losses for daily prescription dispenses using this report, which highlights dispenses where the pharmacy received less for the prescription than it paid for it.

Based on this information, you can follow up on NDC costs, payor build and charge tables if necessary or provide additional training for those who dispense prescriptions at a loss. You can also follow up with external payors if there are issues with the amounts payors are returning for prescriptions.

This report is built from the **Reporting Workbench Prescription Fills** report template.

Operational and Workflow Reports

RxAmb Find Upcoming Refills Due

To help the pharmacy run more efficiently and provide patients with their medication refills in a more timely manner, use this report which shows prescription refills due within five days before and after today's date, along with the number of refills remaining and information about whether the prescription is PRN and whether a fill is in progress. When a refill is selected, the report pane shows more details about the prescription, including the medication, ordering provider, pharmacy, dispense history and warnings history.

From the report, you can select refills you want to begin work on and click **Start Fills** to initiate fills for those prescriptions in the system. You can also:

- See a list of the patient's other medications.
- Add the patient to a **My List** for further follow up.
- Perform medication management for the patient.

This report is built from the **Reporting Workbench Find Orders for Upcoming Prescription Fills** report template.



RxAmb Weekly Prescription and Fill Revision Requests

See which prescriptions and fills, during clinical review and fill verification, are being rejected and why. Use this information to provide additional training or evaluate staffing and workflows to reduce the incidence of inaccurate prescriptions and fills.

For each rejected prescription or fill, the detail report shows the prescription number, the action taken, time, date and reason for the action, user taking the action, user filling the prescription and barcode scan status. The summary report shows the number of prescriptions or fills rejected, grouped by type of modification and reason for the modification.

From the report, you can open the patient's chart for more information about the patient's condition and treatment or send a message to the patient about the prescription change.

This report is built from the **Reporting Workbench Prescription Actions** template.