

Report Request – Setting Preferences and Printer Favorites for HIM and Business Office Staff

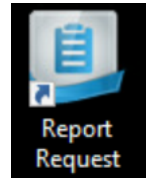
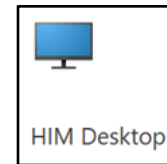
Report Request **EDUCATION**

Report Request (Clinical Reporting-XR system) is the tool for printing medical records. Report Request does not launch from PowerChart; therefore, these applications will need to be opened separately.

Setting Preferences Using Report Request

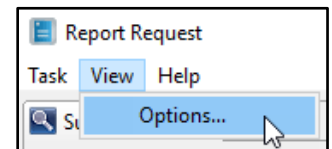
Getting Started (for HIM Staff that use HIM Desktop)

1. Open PowerChart on your left monitor. Sign in with your PowerChart username and password.
2. Open HIM Desktop from Citrix StoreFront.
3. Click on the **Report Request** icon.
 - a. **Note:** the icons are very similar, **do not select** Report Request Maintenance.
4. Sign in to the Report Request (Clinical Reporting-XR system) with your network username and password. Move your HIM Desktop to your right monitor and then maximize the screen.
5. Non-HIM staff: launch Report Request directly from published Citrix StoreFront icon.



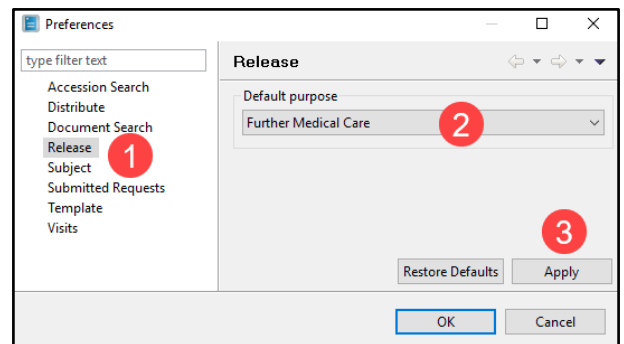
Setting Preferences Overview

- The first time you utilize the Report Request you will need to set your preferences. The system will remember these preferences, but you can change them at any time using the same instructions.
 1. Click **View**.
 2. Click **Options**.
 3. The **Preferences** window will open. Preferences will be set for **Release, Subject, Template** (optional) and **Visits**. See below for further details on settings preferences and steps to complete.



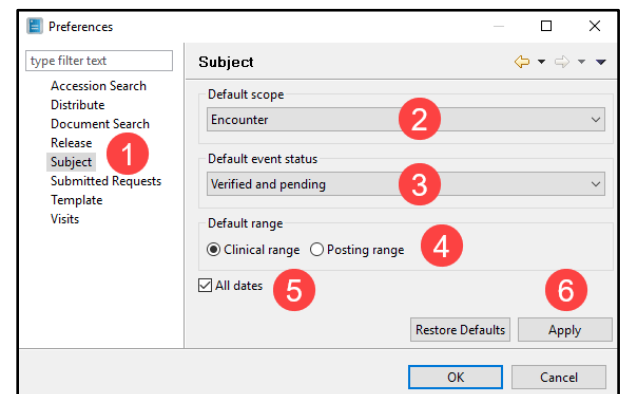
Setting Release Preferences

1. In the Preferences window, click **Release** on the left menu.
2. For the **Default purpose** drop down menu, select **Further Medical Care**.
3. Click **Apply**.



Setting Subject Preferences

1. In the Preferences window, click **Subject** on the left menu.
2. For the **Default scope** drop down menu, select **Encounter**.
3. For the **Default event status** drop down menu, select **Verified and pending**.
4. Under **Default range**, leave the circle next to **Clinical range** selected.
5. Leave the box next to **All dates** selected.
6. Click **Apply**.

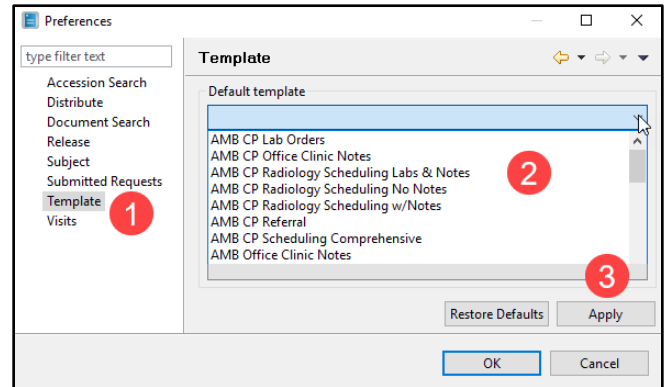


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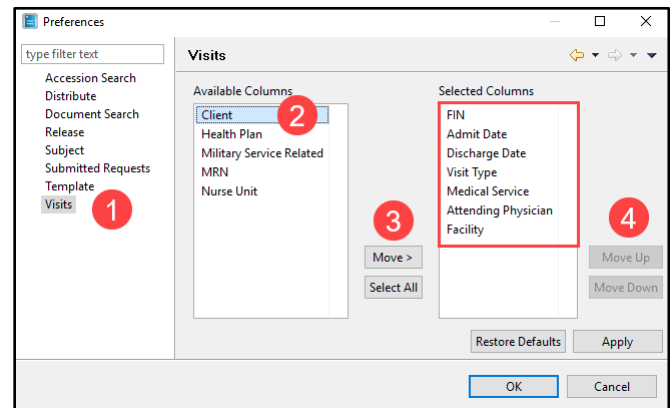
Setting Template Preferences (Setting this is optional/user preference)

1. In the Preferences window, click **Template** on the left menu.
2. For the **Default template** drop down menu, select your preference if desired.
3. Click **Apply**.



Setting Visits Preferences

1. In the Preferences window, click **Visits** on the left menu.
2. Select an item in the **Available Columns**.
3. Click **Move >** to move that item to the **Selected Columns**.
 - a. Ensure you move the following items: **FIN, Admit Date, Discharge Date, Visit Type, Medical Service, Attending Physician, and Facility.**
4. In the **Selected Columns**, use the Move Up and Move Down buttons to rearrange the list.



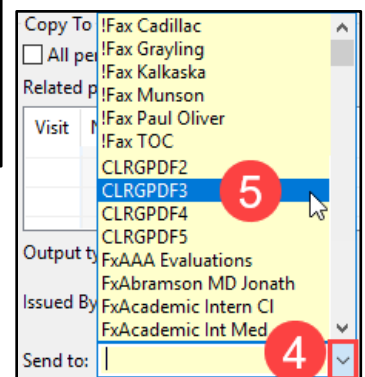
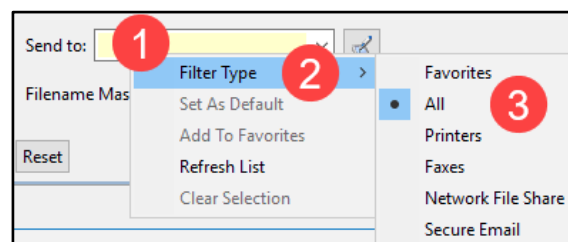
Finalizing Setting Preferences

- Once you have set the preferences above, click **OK** in the bottom right corner.

Setting Printer Favorites Using Report Request

- Each user can create a list of favorite/frequently used printers.

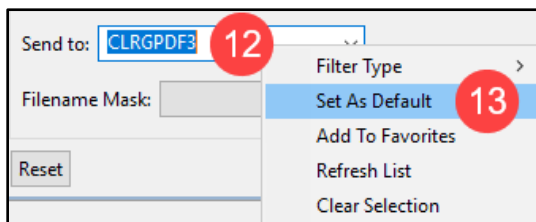
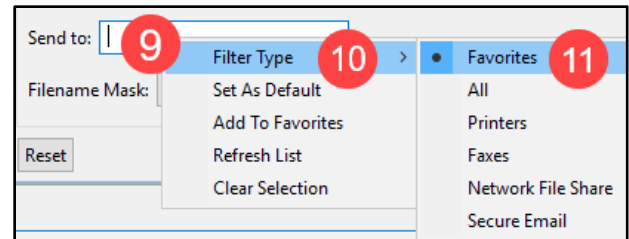
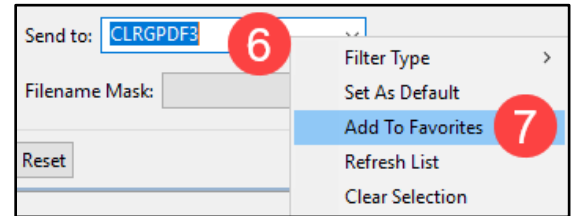
1. In bottom right corner of the screen, right click in the **Send To** field.
2. Hover over **Filter Type**.
3. Verify that **All** is selected. If not, select **All**.
4. Click the down arrow in the **Send To** field, to display full list of printers and PDFs.
 - a. **Note:** PDF folders names are all capital letters. Lowercase letter folder names are listed for MRP only and will be removed in the future.
5. Click printer name to select.



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6. Once a printer has been selected and is displayed in the **Send To** field, right click to display menu.
7. Click **Add To Favorites**.
8. Repeat this process to add printers to favorites.
9. Once desired printers are in favorites, right click in the **Send To** field.
10. Hover over **Filter Type**.
11. Select **Favorite**.
12. To set a default printer, select the desired printer so that it is in the **Send To** field.
13. Right click on the printer name and select **Set As Default**.



Finalizing Setting Preferences and Printer Favorites

- To ensure all settings have been saved completely, complete the following steps:
 1. Click **Task** in the upper right-hand corner of the window.
 2. Click **Exit**.

