PCSL Proactive Outreach: Reporting Workbench

Impacted Users:

Populations for outreach are identified in Reporting Workbench reports which can be accessed via “My Reports”.

Navigating to “My Reports” via Epic Button or Navigating to “My Reports” via Search

1. **Click** on the Epic button.
2. **Hover** cursor over “Reports”.
3. **Click** “My Reports”.

1. **Click** in the “Search Field”.
2. **Type** “my report”.
3. **Click** “My Reports”.

Search for Reports in Workbench

1. **Click** “Library”.

2. **Type** in keywords for the reports. In this example, “pcsl hypert”. **Click** “Search”.

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*Effective: 6/2020 PCvFeb/2019*
Note: If the desired report did not populate in the search results, ensure there are no Filters active.

3. Click the “star” next to the report to make a favorite.

4. Hover over the desired report and click “Run”.

Applying Filters

Click “Filters” and click on the check boxes next to any pertinent filter options to narrow the list. Click “Apply” after selecting desired filter(s).
Outreach via myPennMedicine (MPM)

1. Click the check box for “Pt Portal Status”.
2. Click the check box for “Activated”.
3. Click “Apply”.

4. To select all patients in this filtered list, click “Select All” or use the keyboard shortcut by press-hold “Ctrl” button and press “A”.

5. Click “Send Patients Message”.

6. Enter text appropriate to report and outreach method.
Outreach via Telephone

Filter for all choices other than “Activated” for “Pt Portal Status” by **clicking** on the check boxes. **Click** “Apply”.

1. **Click** on the patient row to highlight
2. **Click** the “Telephone” button.
3. **Click** “New” in the pop-up window.
4. **Complete** the Telephone encounter with the appropriate documentation, specifically SmartPhrases or Text.
Collectively
1. Click “Select All” or use the keyboard shortcut by press-hold “Ctrl” button and press “A”.
2. Click “Add to List”.

3. Select a previously created Patient List or create a new Patient List. Click “Add to Patient List”.

Outreach via Letters

Individually
1. Click on the patient row to highlight and
2. Click the “Letter” button.
3. **Click** “New” in the pop-up window.

![Image of pop-up window with “New” highlighted]

4. **Complete** the Communication with the appropriate templates.

![Image of PennChart Tip Sheet]

**Collectively**

1. **Click** “Select All” or use the keyboard shortcut by press **hold** “Ctrl” button and **press** “A”.
2. **Click** “Generate Letters”.

![Image of generating letters in PennChart]

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3. **Complete** the fields in the pop-up window.

   *Note:* The letter templates are currently being built.