Step 1. Log into the system and from the menu bar on the side, select "Reports".

÷	→ C 🏠 🔒 billing9	.onetouchemr.com/cor	m/fkc/jcm/opm/topen	
ONETOUCH MASTER [S9-200]				
4	Ctrl+Ctrl Go	!		
<u>0</u>	⇔ Home	Home Dasht	ooard	
1	Patient	+ 🛛 Update -	10/09/2020 • 06:0	
<u>2</u>	Scheduling	Welcome to	New Release (v	
<u>3</u>	Charges		ers by Status Vi	
<u>4</u>	Payments	Insurance	Faci <u>l</u> ity ©	
<u>5</u>	Claims	Otatus		
<u>6</u>	Statements	LE	LOCAL EDIT	
7	Interface	PE	PAYER REJE	
8	Reports	CE	CLEARINGHO	
9	l ibraries	IP0U	TO BE UPLO	
-		IP0P	TO BE PRINT	

Step 2. Once in the "Reports" area, select "Custom Patient Query"

Reports	?		
Allowed Fee	e Exceptions	CPT by Provider/RVU	Encounte
Payroll Report		Practice Analysis	Productiv
Referral Source Analysis		Service Facility Visits	
+ × Patient			
Patient Patient	Ledger	Patient Query By Form	Aging I
Patient Patient Custom Pa	Ledger	Patient Query By Form Eligibility History	Aging I
Patient Patient Custom Pa	tient Query Custom Patie	Patient Query By Form Eligibility History ent Query	Aging t

Step 3. Click on the "Modify" button. This opens up a dialog box which allows you to begin selecting the desired criteria.

NETOUCH MASTE	R [S9-200] <u>KEHLING</u>	
Gol Custom F Saved Quer Default Cu Filter Criter Patient ID Modify T	Columns To Display Patient ID Name - Full - Last, First	119.49
Modify	Available Columns Accept Assignment(1) Accept Assignment(2)	
	Accept Assignment(3) Active Added - Date Added - Time Added - User Address Address 2	

Step 4. Once you've selected the desired criteria, you may then sort them in the desired order.



Step 5. From the main screen, you may now drill down further into the various criteria. If you wish to see "ALL" records, simply leave these boxes blank.

Default Custor	Save Current Query as N n 1 Custom 2 Call List	ew					
Filter Criteria	lear 🗟, 🔼 🚾						
Patient ID	- SELECT -	~	P	Name - Full - Last,	- SELECT -	~	
E <u>m</u> ail	- SELECT -	~		Phone - Cell	- SELECT -	~	
Phone -	- SELECT -	1		Phone - <u>W</u> ork	- SELECT -	~	
	EQUALS INCLUDES			Run			
Modify This	DOES NOT INCLUDE STARTS WITH	ninutes to	complete. Plea	se do not refresh yo	ur screen.	Page Size:	50
Patient ID	ENDS WITH	t, First	Email	Phone - Cell	Phone - Home	Phone - V	Vork
	CONTAINS DOES NOT EQUAL DOES NOT CONTAIN						

Step 6. Press the "Run" Button

FII0118 - Cell	
Phone - <u>W</u> ork	
Run	
e. Please do not refre	

Step 7. You will now see your results.

Patient ID	Name - Full - Last, First	Email	Phone - Cell	Phone - Home	Phone - Work
1	NELSON, DEBRAA		330-923-8777	330-834-8909	330-833-2206
2	MITCHELL, STEPHANIE D	kydukefan24@gmail.com	330-232-6088	330-833-2714	330-833-2203
3	CARTER, AMANDA L		330-	330-831-6944	330-833-2201
4	GONZALEZ, MARTHA M		330-	330-547-7493	330-836-3196
<u>2</u>	PEREZ, CAROLYN L		330-	330-532-7994	330-533-9299
Z	ROBERTS, CHRISTINE L		330-	330-694-4354	
3	TURNER, MARIE L		330-369-2798	330-369-4266	330-836-3196
2	PHILLIPS, JANET M		330-	330-922-9454	330-836-3196
10	CAMPBELL, CATHERINE L		330-	330-465-2093	330-836-3196
11	PARKER, FRANCES M		330-	330-923-8219	330-836-3196

Step 8. At the top of the screen you will have the option to save/export as an Excel spreadsheet, a PDF file, or assign it to a worklist within the system.

Custom Pat	Custom Patient Query				
Saved Queries	s Save Current Query as New				
Filter Criteria	<u>C</u> lear 🛃 🛛 wk				
Patient ID	- SELE Export to CSV				
E <u>m</u> ail	- SELÉ				
Ph <u>o</u> ne - Home	- SELECT - V				

You may now "Save Current Query as New" and name your query which allows you to run the same report in the future without having to create a new query each time.