

Creating a Report in FidelityEHR

Magellan
HEALTHCARESM

In FidelityEHR click on Menu...

Home-FidelityEHR
my.fidelityehr.com/Default.aspx

Rachel Mcken
39 Magellan Of Wyoming

Menu

Monday
February 13, 2023
8:42:10 AM

HOME
ENROLLMENT
QUICK QUERY
REPORTS
SERVICES
ADMIN

Quick Links
Version: Administrator

Member, Family, Team
Add a New Member Record
Find a Member Record
Add/Edit Progress Notes/Contacts
Add/Update Plan Of Care for Member
Add/Review Assessment(s) for Member
View/Print Team Meeting Worksheet
Add/Edit Team Meeting Notes

Configuration Setup
Service Provider
Organization
User
Non-User

Client Records
Version: Administrator

Sort Clear Filter

Report Builder
WFI-EZ Fidelity Reports

Name	Case Number	Facilitator	Organiz Name	
Henderson, DeAndre..	113374	Test, Michelle	39 Magellan O..	Referral - ACTIVE
Testcase, Amy		Test, Michelle		Pending

2 Records

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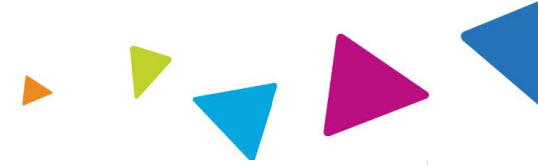
37°F Sunny 8:42 AM 2/13/2023

Pathway to Reports

- Click on Menu
- Click on Reports
- Select Report Builder
- External Provider Reports
- Select Report
 - 7 Day Application Authorization (Funding Status)
 - Contact Notes
 - Member Demographics
 - Authorizations



4 Types of Reports-----7 Day Application (Funding Status), Authorization, Contact Notes, Member Demographics



All	Search...	Sort by Report Name	Filter	Print
External Provider Reports				
7-day Application Authorization(Funding Status)		Created By: Omolayo Sule Last Edited: 01/20/2023	>	
Active Youths with POC or FCC PA		Created By: Brian Johnson Last Edited: 09/23/2022	>	
Authorizations		Created By: Omolayo Sule Last Edited: 08/02/2022	>	
Contact Notes		Created By: Omolayo Sule Last Edited: 08/02/2022	>	
Critical Incident Report		Created By: Amanda Zwirecki Last Edited: 09/08/2020	>	
Days Since Last CFT		Created By: Amanda Zwirecki Last Edited: 09/08/2020	>	

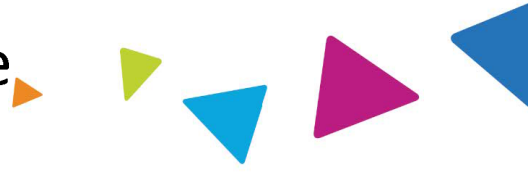
All	Search...	Sort by Report Name	Filter	Print
External Provider Reports				
Enrollment-Authorization Details		Created By: Sam Chhay Last Edited: 01/21/2021	>	
Last Contact Date		Created By: Amanda Zwirecki Last Edited: 09/08/2020	>	
Length of Stay		Created By: Brian Johnson Last Edited: 12/02/2022	>	
LOC Tracking Report		Created By: Brian Johnson Last Edited: 01/12/2023	>	
Member Demographics		Created By: Omolayo Sule Last Edited: 10/26/2022	>	
Minimum Contacts		Created By: Amanda Zwirecki Last Edited: 01/15/2021	>	

Pulling a Report and Filtering




Do not change!
This will mess
up the report.

Subscribing a Report-----Get it Sent on your Timetable



Contact Notes 

Filters

Apply Filter
Clear Filter

EnrollmentStatus

Enrollment Status

ContactDate

All


Add Subscription


<input type="checkbox"/>	Instance Name	Schedule	Filter Value Selection	Delivery Type	Delivery Method	Action
<input type="checkbox"/>	Contact Note Report	Occurs every week on Monday effective 09/12/2022 at 06:00 AM (UTC-07:00) Mountain Time (US & Canada)	EnrollmentStatus = Enrolled Enrollment Status = Enrolled ContactDate = Current Year	Email	Attachment (Excel)	  



Edit your Subscription



Edit Subscription [Close]

Instance Name:

Schedule	Delivery
----------	----------

Subscription Type:

Time Zone:

Start Date: Start Time:

Recurrence:

Edit Subscription [Close]

Instance Name:

Schedule	Delivery
----------	----------

Delivery & Recipient

Delivery Type:

Delivery Method:

Export Attachment Type:

Use Subscription Time Zone:

Email Subject:

Email Body:

Export, Email, and Print

The screenshot displays a software interface with a top navigation bar containing 'Dashboards', 'Reports', and 'Settings'. The 'Reports' section is active, showing a report titled 'Contact Notes'. A toolbar above the report includes buttons for 'Subscribe', 'Print', 'Email', 'Export', 'Edit', 'Save', 'Cancel', and 'Close'. The 'Export' dropdown menu is open, listing options: Word, Excel, PDF, CSV, XML, JSON, Query Execution, and Definition. Below the report, a 'Filters' section is visible with columns for 'EnrollmentStatus', 'Enrollment Status', and 'ContactDate'. An 'Apply Filter' button is present.

An email configuration modal is open, showing the following fields:

- To: Select...
- CC: Select...
- Email Subject: {reportName}
- Delivery Method: Link
- Email Body: Dear {currentUserName},
Please see report in the following link.
{reportLink}
Regards,

At the bottom of the modal, a 'Filter Value Selection' section shows '1.EnrollmentStatus ='. 'Send' and 'Cancel' buttons are located at the bottom right of the modal.

Other Reports



[Subscribe](#) [Print](#) [Email](#) [Export](#) [Edit](#) [Save](#) [Cancel](#) [Close](#)

7-day Application Authorization(Funding Status) Preview Records: All

Filters [Apply Filter](#) [Clear Filter](#)

EnrollmentStatus Enrollment Status YouthFunding_T Youth Name

[Youth Name](#) [Enrollment Status](#) [Funding](#) [FacilitatorName...](#) [Funding_StartD...](#) [Funding_EndDate](#)

[Subscribe](#) [Print](#) [Email](#) [Export](#) [Edit](#) [Save](#) [Cancel](#) [Close](#)

Member Demographics Preview Records: 10

Filters [Apply Filter](#) [Clear Filter](#)

EnrollmentStatus EnrollmentStatusStartDate Enrollment Status Legal Guardian?

YID	Youth Name	Age	Gender	Race	Ethnicity	PreferredLangu...	MedicIdNumber	Enrollment Status
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[Subscribe](#) [Print](#) [Email](#) [Export](#) [Edit](#) [Save](#) [Cancel](#) [Close](#)

Authorizations Preview Records: All

Filters [Apply Filter](#) [Clear Filter](#)

EnrollmentStatus Enrollment Status YouthFunding_T AuthorizationID

Youth Name	Agency	Enrollment Status	FacilitatorName...	AuthorizationID	ServiceName	Serv Start Date	Serv End Date	Total Service U
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