Checking My Health Record status in Genie

Patients with a Shared Heath Summary uploaded within a certain time period.

1. Navigate to File > QuickReports.
2. In the Tables column, highlight the [CDA] table.
3. Click Query.
4. In the Available Fields column, expand the [CDA] table using the arrow.
5. Highlight the **CreationDate** field.
6. In the Comparisons column, highlight **is greater than**.
7. Enter the start date of your chosen time period in the Value field.
8. Click the Add Line button.
9. Ensure **CreationDate** is still selected in the Available Fields column.
10. In the Comparisons column, highlight **is less than**.
11. Enter the end date of your chosen time period in the Value field.
12. Click the Add Line button.
13. In the Available Fields column, highlight the **SentToPCEHR** field.
14. In the Comparisons column, highlight **is equal to**.
15. Select **True** for the Value at the bottom.
16. Click the Add Line button.
17. In the Available Fields column, highlight the **Type** field.
18. In the Comparisons column, ensure that **is equal to** is highlighted.
19. Enter **SHS** (without quotes) into the Value field at the bottom.
20. If you wish to save this query for future use, click on the Save button near the top, and save the file somewhere you will remember. When generating the report next, you can click on the Load button to open the same query again.
21. Click the Query button.
22. You should notice that the text above the Query button will change to state how many records are selected.
23. Click on the Columns tab.
24. Double click on any of the fields in the left hand column that you would like to see on the report. You will be able to expand the **PT_Id_Fk** table using the arrow to access the patient demographics information.
25. Once you have the fields you wish to display on the report, click on Save to save the layout of this report for future use.
26. Click on Print to print the report, or Export to export the information to an Excel document.

Generate a report containing patients who have an active My Health Record registration.

1. Navigate to File > QuickReports.
2. From the Tables column, highlight the **[HIAudit]** table.
3. Click on Query.
4. In the Available Fields column, expand the **[HIAudit]** table using the arrow.
5. Find and highlight the **IHIStatusNew** field.
6. In the Comparisons column, ensure that **is equal to** is highlighted.
7. Enter **Active** into the Value field at the bottom.
8. Click Add Line.
9. In the Available Fields column, find and highlight the **HIWSOperation** field.
10. In the Comparisons column, ensure that **is equal to** is highlighted.

11. Enter **searchIHI** into the Value field at the bottom.
12. Click on Query.
13. You will notice that the text above the Query button will change to state how many records are selected.
14. Click on the Columns tab.
15. Double click on any of the fields in the left hand column that you would like to see on the report. You will be able to expand the **PT_Id_Fk** table using the arrow to access the patient demographics information.
16. Once you have the fields you wish to display on the report, click on Print to print the report, or Export to export the information to an Excel document.