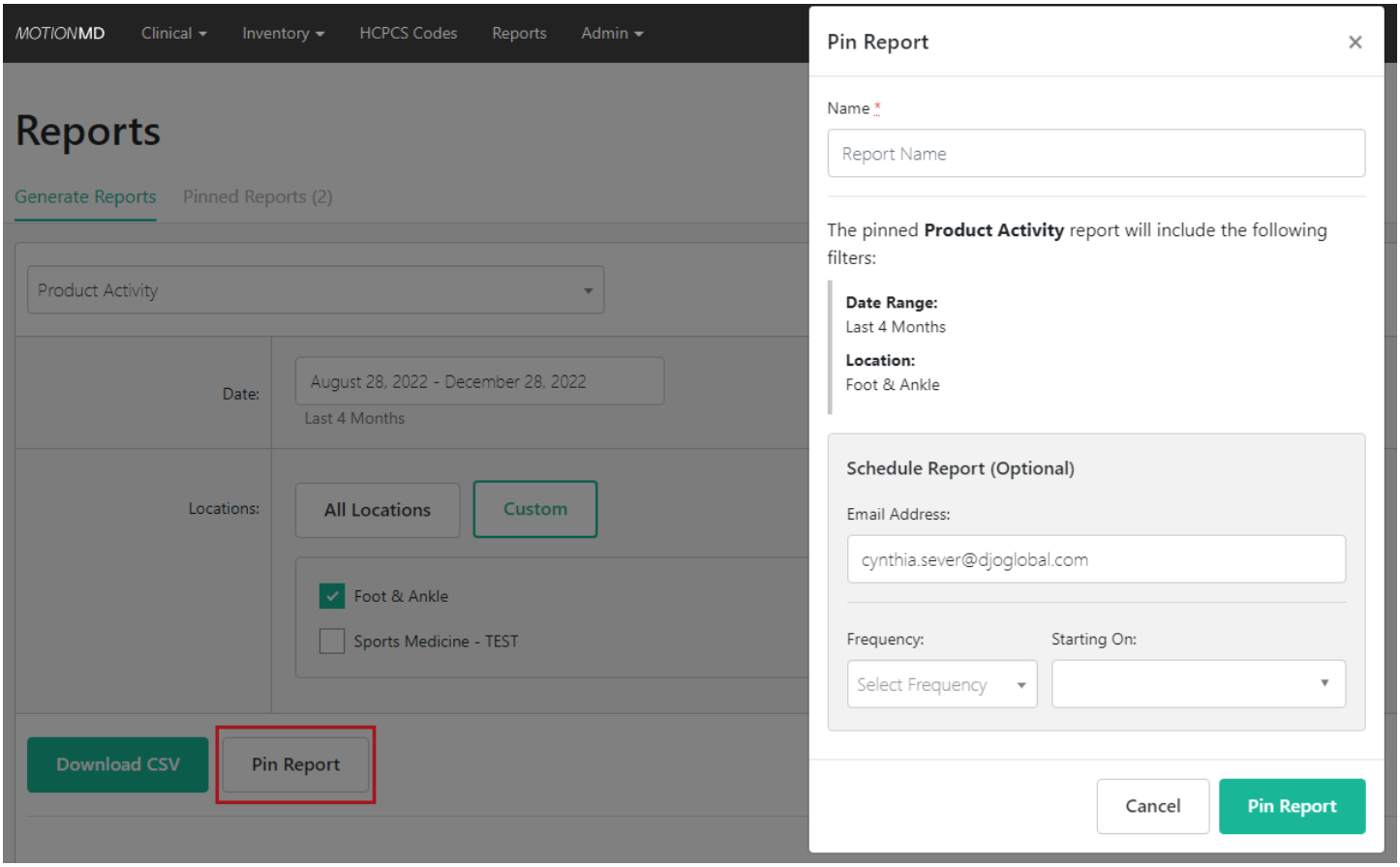
SCHEDULING REPORTS

A new feature has been developed to allow Users to schedule a set of reports that will then be emailed to the User's email address or sent to their MotionMD Messaging inbox. This feature is only available to Pro Tier customers. If a report can be Pinned, it can also be scheduled and the frequency it's sent can be set to daily, weekly or monthly. Any report that does NOT contain PHI will be emailed to the email address tied to the User who is scheduling the report. If a report contains PHI (Protected Health Information) it can only be scheduled to deliver to the Users MotionMD Messaging* inbox for security reasons.

In order to Schedule a report, it first needs to be Pinned. Any report that cannot be Pinned, cannot be scheduled to automatically deliver. Scheduled Reports will be generated and emailed overnight and will begin on the Starting On date if it's a date in the future. Instructions for Pinning Reports can be found in the Help Center on the knowledge article labeled 'MotionMD Reports Dashboard.'

To Schedule a Pinned report without PHI: Select a report from the Generate Reports tab. After selecting Date range and any other filters, click the Pin Report button. Within the modal, add the Name of the report, this allows you to name the report with a helpful title and will be seen within the email and is a mandatory field. The Pinned date or filter parameters are visible in the next section. If you do not want to Schedule the report, leave the Schedule Report section blank and click Pin Report button.



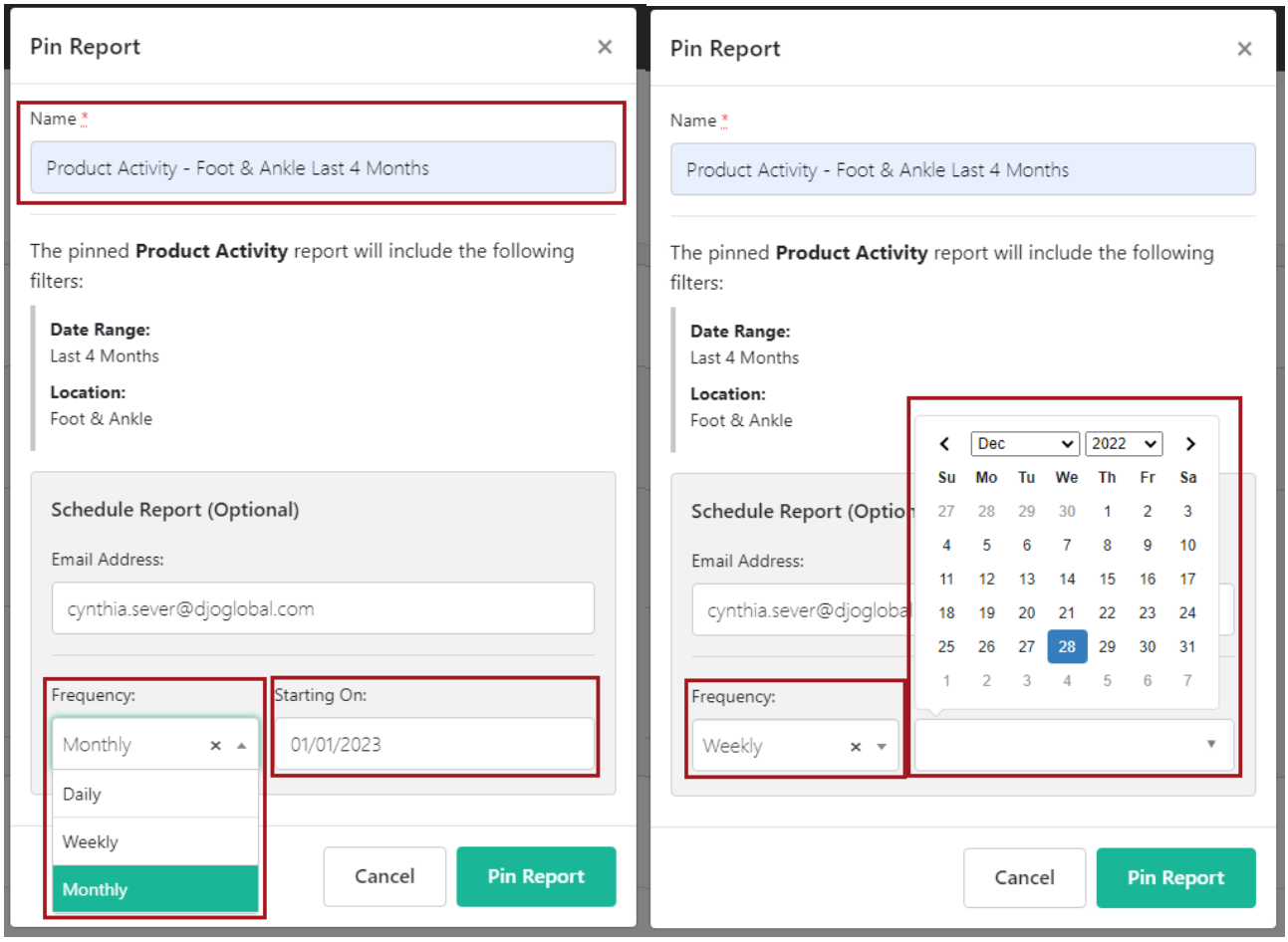
*To learn more about MotionMD Messaging, please refer to the document in the Help Center

Scheduling a Pinned report without PHI continued:

The email address of the User scheduling the report will be auto populated in the Email Address field and cannot be edited.

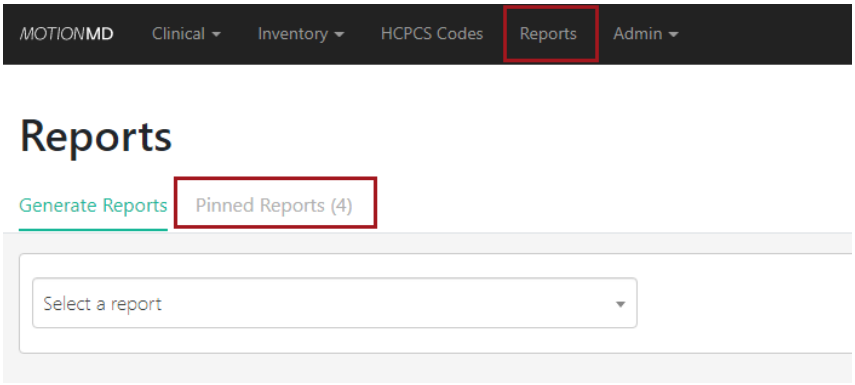
Add the **Frequency** you want the report emailed. If you select Monthly, the **Starting On** date will default to the first date of the next month and can't be changed. If Daily or Weekly are selected, click into the **Starting On** field to open the calendar to select a date the report should start delivery.

After the Scheduling Frequency and Starting On date are set, click the **Pin Report** button.

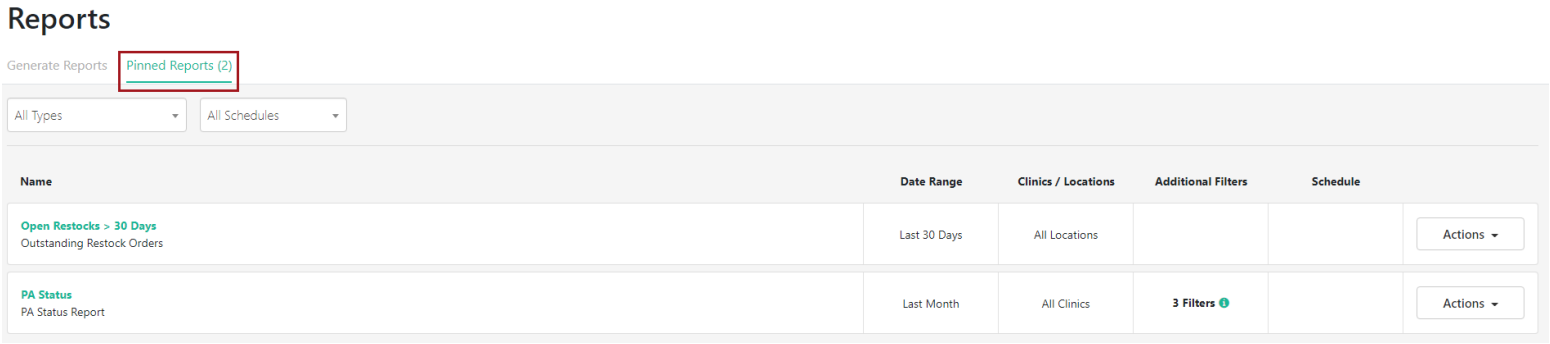


Pinned Reports Tab:

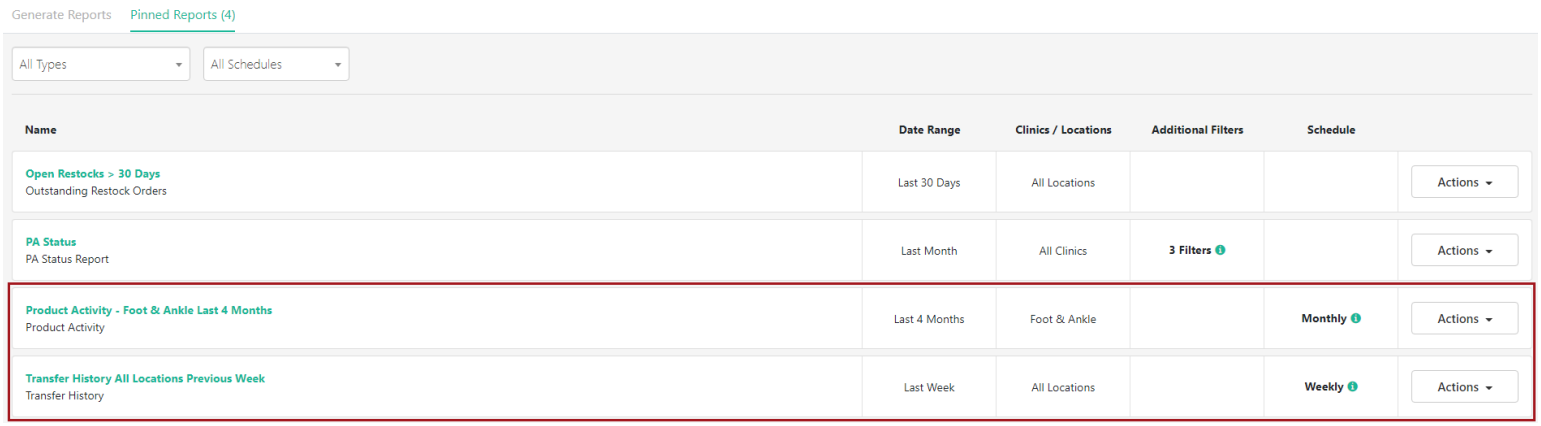
On the Reports dashboard page click into the new tab labeled **Pinned Reports**.



All Reports currently Pinned will be listed on the Pinned Reports tab. The total number of Pinned reports will show in the tab name. To create a Schedule for a currently pinned report click the Actions button then Edit.

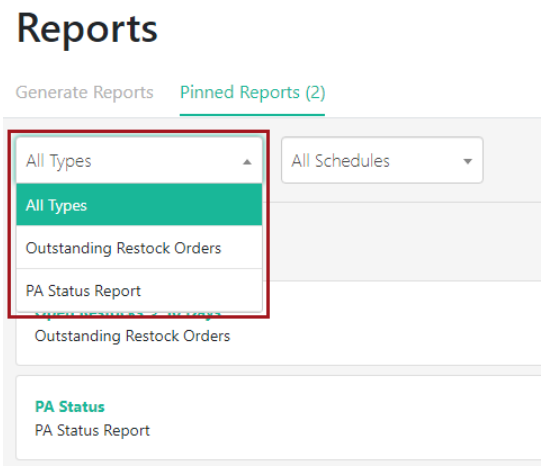


Newly Pinned and Scheduled reports will show at the bottom of the list of Pinned reports. If a Pinned report has been scheduled, the Frequency will populate in the Schedule column. If that column is blank, the Pinned report has not been scheduled.

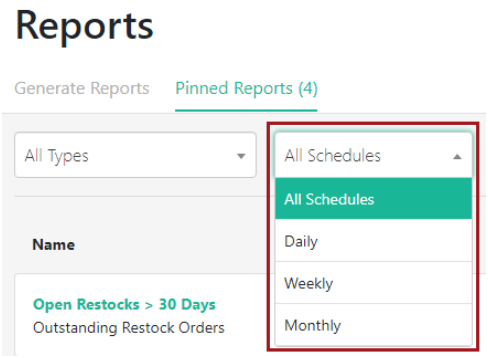


Pinned Reports Tab continued:

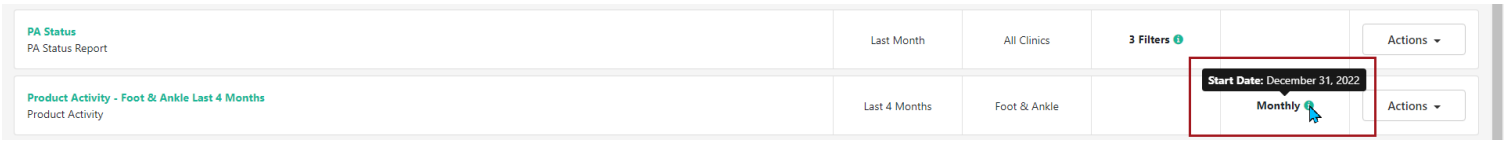
The **All Types** filter will list the reports that have been pinned.



Pinned reports that have been Scheduled can be filtered using the **All Schedules** dropdown and can be filtered by All or by Frequency – Daily, Weekly or Monthly.



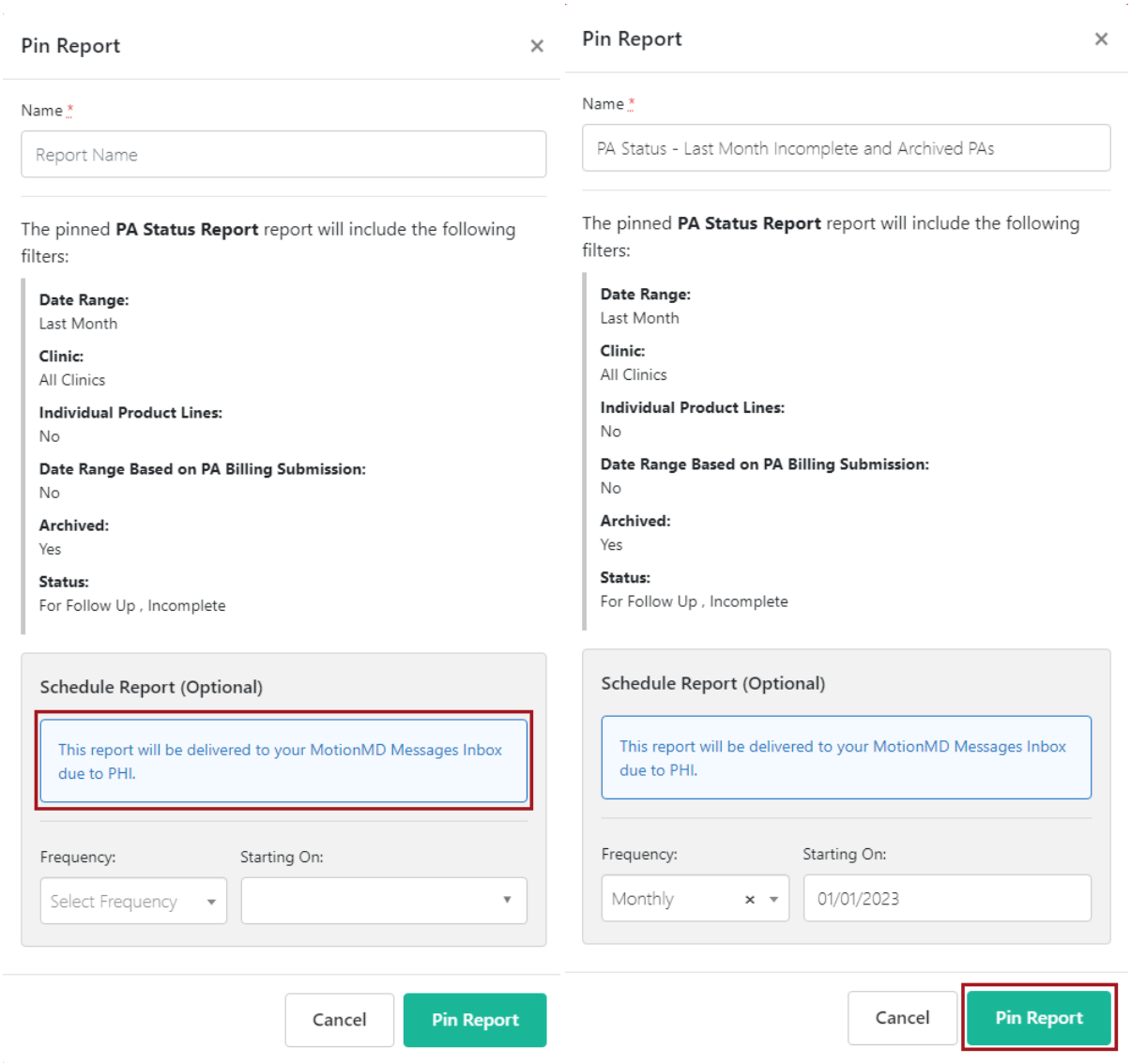
Hovering over the Information icon will display the Start Date the report will be sent.



The Actions menu allows Pinned reports to be Edited or Removed and if Scheduled, Removing the Scheduling.

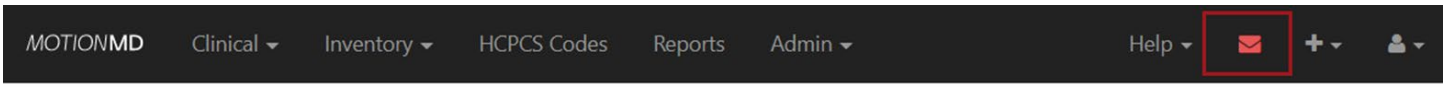
Scheduling a Pinned report with PHI: In order to receive a Scheduled report containing PHI a new feature called MotionMD Messaging must be enabled. To learn more about this feature, please refer to the Help Center article titled MotionMD Messaging

After selecting the report filters and parameters, click the **Pin Report** button. If a report contains PHI, instead of seeing the email address of the User creating the pinned report it states, 'This report will be delivered to your MotionMD Messages Inbox due to PHI.' Enter the report Name, Frequency and Starting On date and click the **Pin Report** button.

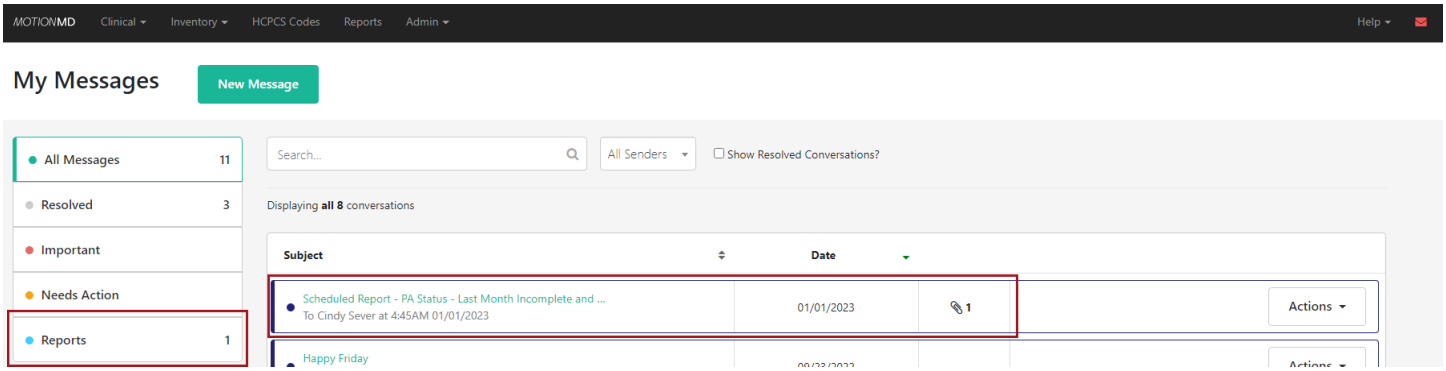
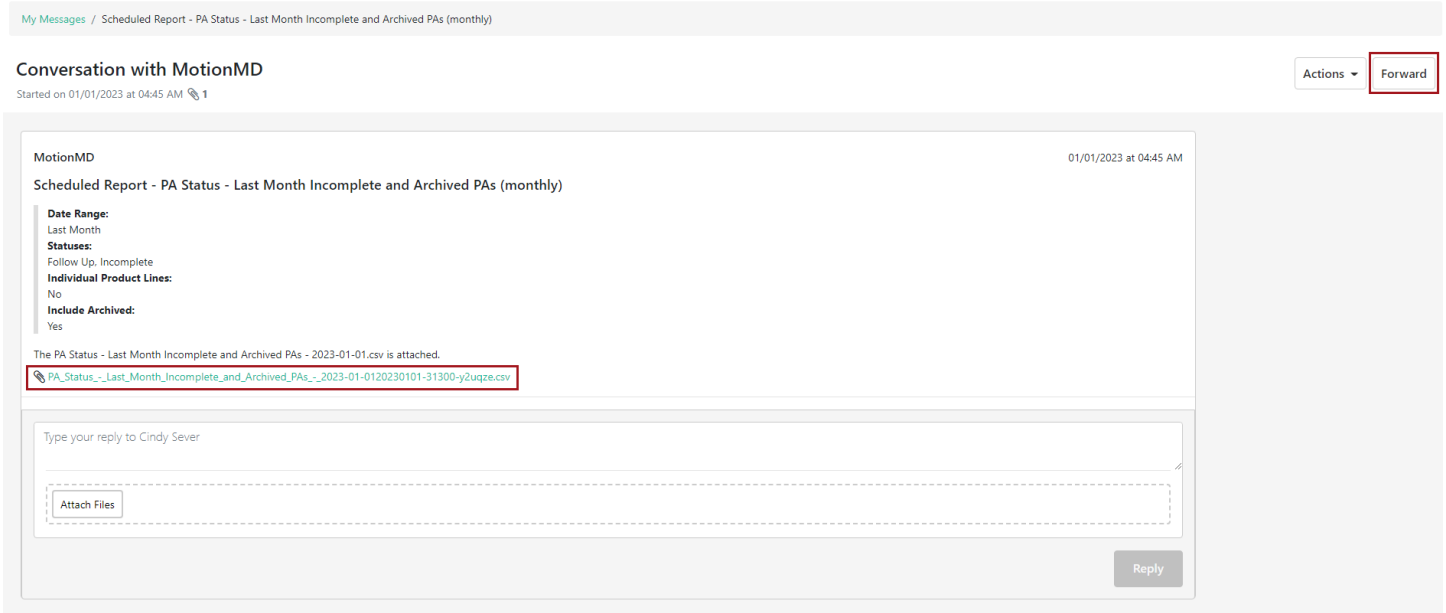


Scheduling a Pinned report with PHI continued:

The MotionMD Messaging envelope icon is located on the navigation bar at the top right and will be Red if a new message is in your inbox. Click on the envelope icon and the My Messages page will open.



The Scheduled report with PHI will be delivered on the scheduled start date and the message will indicate there is an attachment. The Reports filter will show number of messages sent with Scheduled Reports attached. Select the Reports filter to show a list of messages with Scheduled Reports attached.



Click on the message then click the green highlighted report name link to download the report. If you would like another User within your account to also receive this report the message can be forwarded to that individual by clicking the Forward button.