

How to run a report based on the appointment's payment profile

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An option has been added to advanced reports that will allow you to pull a report based on an appointment's payment profile.

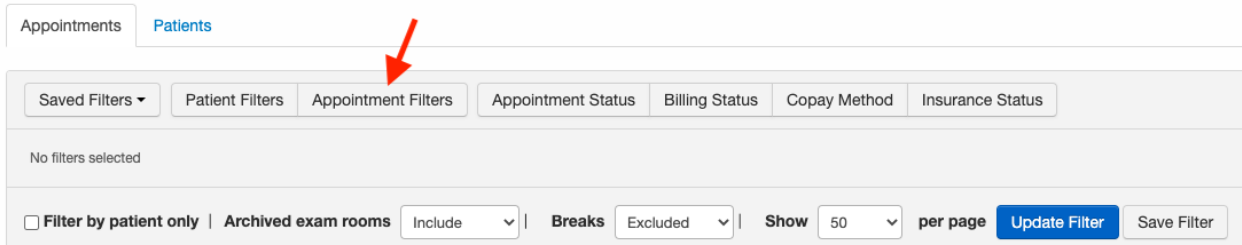
You could pull a report of all appointments that have a payment profile of cash, insurance, insurance out-of-network, auto accident, or workers' comp.

- Hover over Reports and select Advanced Report



- Select Appointment Filters

Advanced Report

A screenshot of the 'Advanced Report' filter interface. At the top, there are two tabs: 'Appointments' and 'Patients'. Below the tabs is a horizontal row of filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. A red arrow points to the 'Appointment Filters' category. Below this row, it says 'No filters selected'. At the bottom, there are several controls: a checkbox for 'Filter by patient only', a label 'Archived exam rooms' followed by a dropdown menu set to 'Include', a label 'Breaks' followed by a dropdown menu set to 'Excluded', a 'Show' label followed by a dropdown menu set to '50', and the text 'per page'. To the right of these controls are two buttons: 'Update Filter' and 'Save Filter'.

- Select Payment Profile (and any other fields you would like to see on your report.)

Appointment Filter

x

Check All

Uncheck All

Doctor

Billing Provider

Office

Examroom

Appointment Profile

Payment Profile

Walk In?

New Patient?

Primary Ins Payer ID

Secondary Ins Payer ID

DOS After (Inclusive Date)

DOS Before (Inclusive

Billed After

Billed Before

Duration >=

Duration <=

Reason contains ALL of

Reason contains ANY of

ICD-9 Codes contains ALL of

ICD-9 Codes contains ANY of

ICD-10 Codes contains ALL of

ICD-10 Codes

CPT, HCPCS and Custom Procedures contains ANY of

Smoking Status

BMI is not blank

BMI >=

BMI <=

Systolic BP is blank

Systolic BP is not blank

Systolic BP >=

Systolic BP <=

Diastolic BP is blank

Diastolic BP is not

Close

- You can select 1 or more payment profile options for your report.

Appointments **Patients**

Saved Filters ▾

Patient Filters

Appointment Filters

Appointment Status

Billing Status

Copay Method

Insurance Status

Payment Profile

x

Cash

Insurance

Insurance Out of Network

Auto Accident