# **Reporting on Custom Demographics**

07/24/2024 8:10 pm EDT

Reports on custom demographics can be generated under the Advanced Report feature in the Reports menu.

### 1. Go to Reports > Advanced Report

Reports	Billing	Account	
PRACTICE	REPORTS		ļ
Account /	User Repo	rt	ĺ
Productivi	ity Report		ł
Reminder	Report		
Outgoing	Prescriptior	ıs	ĺ
Patient Ins	surance Aut	horization	ł
Appointm	ent Report		
Telehealth	Report		İ
Patient Re	eport		ł
EHI Data I	Export		
Communi	cation Log I	Report	l
Medicatio	n Report		-
Problem F	Report		
Allergy Re	port		1
Labs Rep	ort		
Advanced	l Report		
Patient Pa	ayment Plan	Report	
			.J

2. Once in the reports screen, there are two options to run a report on custom demographics.

### Option 1

### Go to Patient Filters.

User Report	Advanced Report
Productivity Report	Appointments Patients Procedure Code
Reminder Report	
Outgoing Prescription	Saved Filters •         Patient Filters         Appointment Filters         Appointment Status         Billing Status         Copay Method         Insurance Status
Patient Insurance Authorization	No filters selected
Appointment Report	Filter by patient only   Archived exam rooms Include   Breaks Excluded   Show 50 v per page Update Filter Save Filter
Telehealth Report	
Patient Report	Send Email Create Patient Group Export to File -
EHI Data Export	Chart ID         Provider         First Name         Last Name         DOB         Home Phone         Cell Phone         Email         Last Appt

In the patient filters menu, the custom demographics are located on the right side of the menu.

# **Patient Filter**

Office Phone	Name contains ANY of	contains ALL of		
Email is blank	Secondary Ins Plan	Patient Allergy contains ANY of		
No Credit Card on		Lab Test		
File	Secondary Ins ID #			
DOB After	First DOS After	□ Lab Test Result contains ALL of		
DOB Before	First DOS Before			
Month of DOB	□ Last DOS After	Lab Test Result contains ANY of		
Day of DOB	□ Last DOS Before	□ Lab Test Result >=		
Sex	C Referring Dr. First	Lab Test Result <=		
Ethnicity	Name			
	C Referring Dr. Last	□ What is your		
Race	Name	preferred pharmacy		
	Referring Source	DL Number		
Communication		Room Number		
Primary Ins Payer Name contains ALL of		Test Demographic		

Close

Select the filters you would like to generate a report on and click **Close**. Select **Update Filter** once complete.

## Option 2

# Go to Export to File > Custom Export

### Advanced Report

Appointments	Patients Pro	cedure	e Code							
Saved Filters	Patient Filte	ers	Appointment Filters	Appointment Stat	us Billin	g Status	Copay Method	Insurance Status		
No filters selected	1									
Filter by patie	ent only   Archive	d exan	n rooms	→   Breaks Exc	cluded ~	Show	/ 50 ~ p	er page Update Filte	Save Filt	er
Send Email	Create Patient Gro	oup	Export to File -	7						
Chart ID	Provider	Firs	Quick Export	lame	DOB	Home Pho	one	Cell Phone	Email	Last Appt
			Custom Export							

The custom demographics are on the right. Select the demographics for the report and any other filters. Click **Export** when complete. The report will generate in the message center.

	Primary Ins Payer ID #			
Cell Phone	Primary Ins Plan Name	Ref Source		
Office Phone	Primary Ins Group #	Employer		
🗆 Email	Secondary Ins Payer	Employer Zip Code		
Gender	Secondary Ins Payer ID	Employer Address		
Race	□ Secondary Ins Payer ID #	Employer City		
Ethnicity	Secondary Ins Plan Name	Employer State		
Marital Status	□ Secondary Ins Group #	Сорау		
Address	Auto Insurance Payer	Primary Care Physician		
City	Auto Insurance Payer ID	Patient Flags		
□ State	□ Auto Insurance Case #	What is your preferred		
Zip Code	U Worker's Comp Payer	pharmacy		
Mailing Address	UWorker's Comp Payer ID	DL Number		
Mailing City	□ Worker's Comp Case #	Room Number		
Mailing State		Test Demographic		