

Creating Patient Groups from Reporting

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Have you felt that creating a patient group from **Patients > Patient Group** section is time-consuming?

Here is an easier way to create a patient group!

For example: If you would like to create a group for a list of patients with a specific medical condition, insurance, etc, please follow the steps outlined below.

1. Log into your DrChrono website and go to **Reports > Advanced Report**.



2. Select the Filters that you would like to use and click **Update Filters** (Note: you are able to use multiple filters)

Advanced Report

The screenshot shows the 'Advanced Report' configuration interface. At the top, there are tabs for 'Appointments' and 'Patients', with 'Patients' selected. Below the tabs, there are several filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. The 'Patient Filters' section is expanded, showing fields for 'First Name', 'Last Name', 'Primary Ins ID #', 'Office', and 'New Patient?'. The 'Office' dropdown menu is open, showing options for 'All Offices', 'Office 1', 'Office 2', and 'Office 3'. Below these fields, there are sections for 'Appointment Status' (set to 'Complete') and 'Billing Status' (set to 'Paid In Full, Balance Due, Settled'). At the bottom of the filter configuration, there are checkboxes for 'Filter by patient only' and 'Archived exam rooms', along with dropdown menus for 'Include', 'Excluded', and 'Show' (set to '50 per page'). A blue 'Update Filter' button is highlighted with a red box. To the right of the 'Update Filter' button is a 'Save Filter' button. Below the filter configuration, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File'. In the bottom right corner, there is a 'PAGE 1' indicator.

3. Select **Create Patient Group**.

- User Report
- Productivity Report
- Reminder Report
- Outgoing Prescription
- Patient Insurance Authorization
- Appointment Report
- Telehealth Report
- Patient Report
- Communication Log Report
- Medication Report
- Problem Report
- Allergy Report

Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

Primary Ins Payer Name contains ANY of separated by comma

Filter by patient only | Archived exam rooms Include Breaks Excluded Show 50 per page Update Filter

Save Filter

Send Email Create Patient Group Export to File PAGE 1

Date of Service	Patient	Provider	Office	Examroom	Appt Status	Billing Status	Insurance Status	Loc
Sep 9, 2020 6:45:00 AM	Minnie Mouse	Martyna Somerville	(FL) Primary Kids Dept	Dr A			Not Submitted	Un
Sep 4, 2020 12:00:00 PM	Janet Smith	Martyna Somerville	(FL) Primary Kids Dept	Dr A	Confirmed		Not Submitted	Un
Aug 28, 2020 1:30:00 PM	Mickey (Walt) D. Mouse	Martyna Somerville	(FL) Primary Kids Dept	Dr A			Not Submitted	Un

4. Give it a Group Name and Save Patient Group.

Manage Patient Group

View Patient Groups + Add Patient Group

Group Name Medicare Patients

Description

Select Patients

Save Patient Group

Patients

- Bugs Bunny - 03/01/1990 x Mickey (Walt) D. Mouse - 01/01/1990 x
- Bruce Wayne - 02/01/1990 x Tommy Pickles - 03/07/1995 x
- Lola Bunny - 09/25/1988 x Ariel Mermaid - x Sally Walker - 12/31/1990 x
- Harry Potter - 03/21/1987 x MaryKate Olsen - 01/11/1985 x
- Chris Samuel - 01/01/1990 x Tiffany Blue - 01/10/2019 x
- Willie Ray - 10/10/1970 x Ray Horne - 02/02/2000 x
- Frank Wilson - 01/01/1990 x Ruby Red - 01/01/1990 x
- Billy Jean - 06/15/2007 x Sarah Walker - 01/01/2001 x
- Gerald Richardson - 03/31/1990 x Sam Smith - 01/21/1990 x