

How do I run a report with the list of patients' insurances?

07/24/2024 4:15 pm EDT

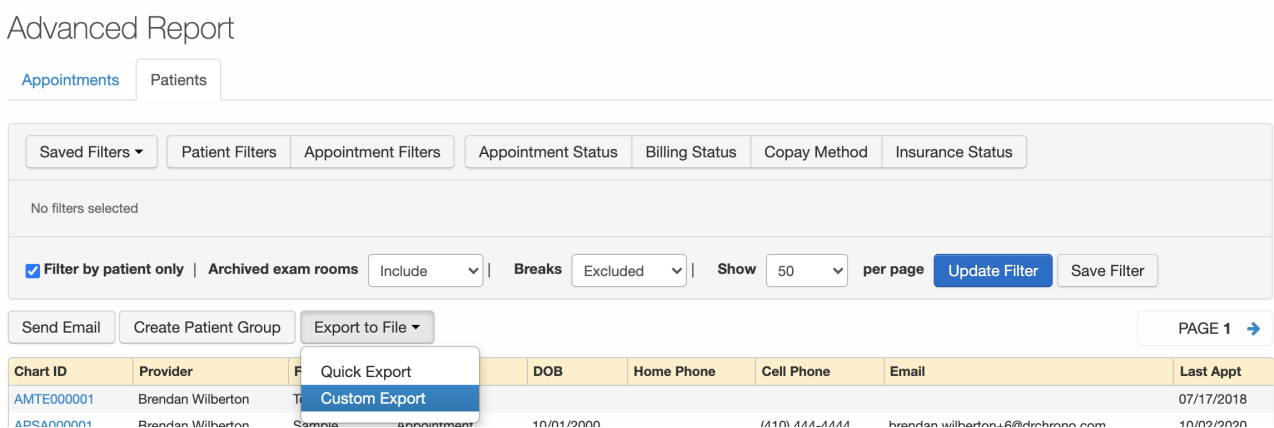
You can easily run a report to gather a spreadsheet of patients and their insurance information.

1. Hover your cursor on **Reports** and choose **Advanced Report**.



The screenshot shows a navigation menu with three main categories: **Reports**, **Billing**, and **Account**. Under **Reports**, there is a sub-section for **PRACTICE REPORTS** containing the following items: Account / User Report, Productivity Report, Reminder Report, Outgoing Prescriptions, Patient Insurance Authorization, Appointment Report, Telehealth Report, Patient Report, Communication Log Report, Medication Report, Problem Report, Allergy Report, and Labs Report. The **Advanced Report** option is highlighted with a blue background.

2. Click on **Export to File** and select **Custom Export**.



The screenshot shows the 'Advanced Report' interface. At the top, there are tabs for 'Appointments' and 'Patients'. Below the tabs, there are filter buttons for 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. A message indicates 'No filters selected'. Below this, there are options to 'Filter by patient only' (checked), 'Archived exam rooms' (Include), 'Breaks' (Excluded), and 'Show' (50 per page). There are 'Update Filter' and 'Save Filter' buttons. At the bottom, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File'. The 'Export to File' dropdown menu is open, showing 'Quick Export' and 'Custom Export' options. Below the menu, a table of patient data is visible with columns for Chart ID, Provider, F, DOB, Home Phone, Cell Phone, Email, and Last Appt.

Chart ID	Provider	F	DOB	Home Phone	Cell Phone	Email	Last Appt
AMTE000001	Brendan Wilberton	T					07/17/2018
ΔPSΔ000001	Brendan Wilberton	S	10/01/2000	(410) 444-4444		brendan.wilberton.16@drchiro.com	10/02/2020

3. Select the required fields under the **Patient** (For example, first name, last name, primary and secondary ins payer). You can also rename the report. When finished, select **Export**.

Custom Export



Report Name

Patient (9) **Doctor**

[Check All](#) [Uncheck All](#)

- | | | |
|---|---|---|
| <input type="checkbox"/> Full Name | <input type="checkbox"/> Date of First Appointment | <input type="checkbox"/> Emerg Contact Relation |
| <input checked="" type="checkbox"/> First Name | <input type="checkbox"/> Date of Last Appointment | <input type="checkbox"/> Referring Doctor |
| <input checked="" type="checkbox"/> Last Name | <input type="checkbox"/> Date of Next Appointment | <input type="checkbox"/> Ref Dr. Email |
| <input type="checkbox"/> Chart ID | <input checked="" type="checkbox"/> Primary Ins Payer | <input type="checkbox"/> Ref Dr. Phone |
| <input checked="" type="checkbox"/> Date of Birth | <input type="checkbox"/> Primary Ins Payer ID | <input type="checkbox"/> Ref Dr. Fax |
| <input type="checkbox"/> Primary Provider | <input type="checkbox"/> Primary Member ID | <input type="checkbox"/> Ref Source |
| <input type="checkbox"/> Home Phone | <input type="checkbox"/> Primary Ins Plan Name | <input type="checkbox"/> Employer |
| <input type="checkbox"/> Cell Phone | <input type="checkbox"/> Primary Ins Group # | <input type="checkbox"/> Employer Zip Code |
| <input type="checkbox"/> Office Phone | <input checked="" type="checkbox"/> Secondary Ins Payer | <input type="checkbox"/> Employer Address |
| <input type="checkbox"/> Email | <input type="checkbox"/> Secondary Ins Payer ID | <input type="checkbox"/> Employer City |

[Close](#)

[Export](#)



4. The reports will get generated in the message center. Click on the envelope icon(



) to access.

The screenshot shows a medical software interface with a navigation bar (Schedule, Clinical, Patients, Reports, Billing, Account, Help) and a search bar. Below the navigation bar is a calendar for July 2020. A message center icon with a notification badge (4) is highlighted in the top right corner.

5. Click on the report to open it.

The screenshot shows a message center interface with a navigation bar (Reports, Billing, Account, Help) and a search bar. Below the navigation bar is a section for "Incoming Messages" with a question mark icon. There are buttons for "Mark as Read", "Mark as Unread", and "Show Archived". A "NEXT" button and a search bar for messages are also present. A table of messages is shown below:

<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchronos	Generated Sheet: Insurance Report.csv					Oct. 8, 2021, 11:47 a.m.	Oct. 8, 2021, 11:47 a.m.

6. From here, you can view or download a spreadsheet of the report.

[Back to Messages](#) Mark as Unread Archive Message

< > Search Messages

 **Generated Sheet: Insurance Report.csv**

Create task

From: drchrono

Friday, October 08, 2021 11:47 AM

[Save Attachment to Patient Chart](#) [Download Document](#) [Audit Log](#)



Notes

+ Add

First Name	Last Name	Date of Birth	Address	City	State	Zip Code	Primary Ins Payer	Secondary Ins Payer
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