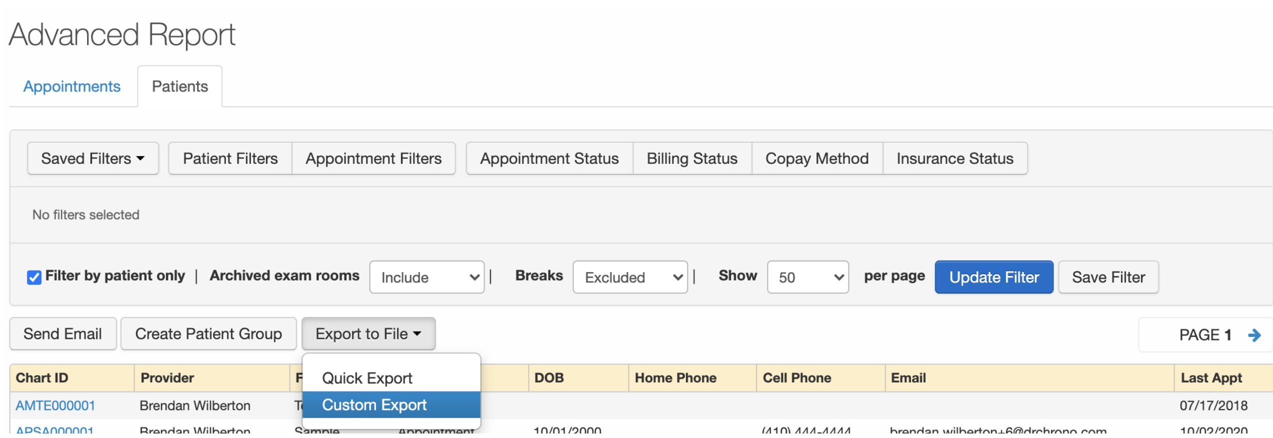
How do I run a report with the list of patients' insurances?

07/24/2024 4:15 pm EDT

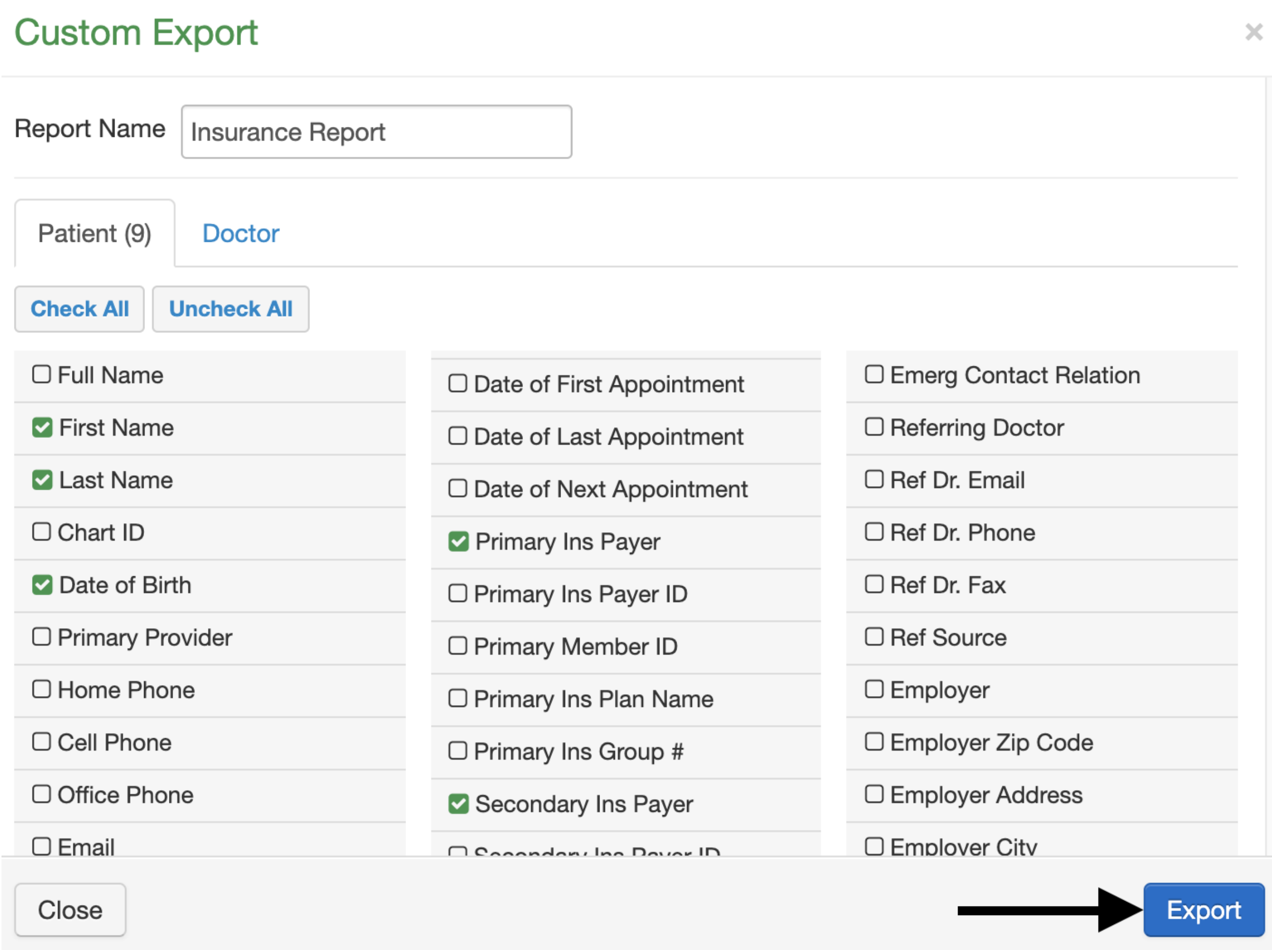
You can easily run a report to gather a spreadsheet of patients and their insurance information.

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

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

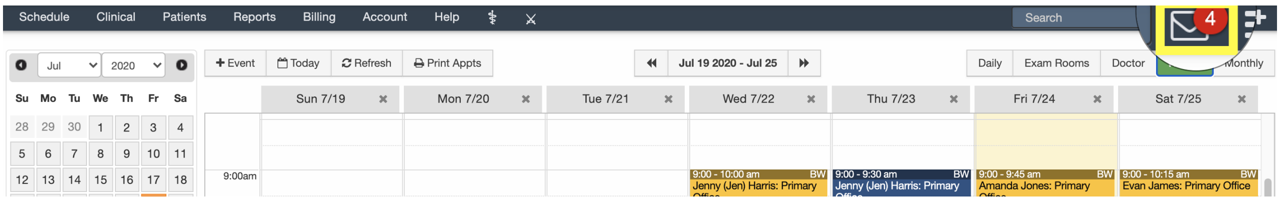


3. Select the required fields under the **Patient** (For example, first name, last name, primary and secondary ins payer). You can also rename the report. When finished, select **Export**.

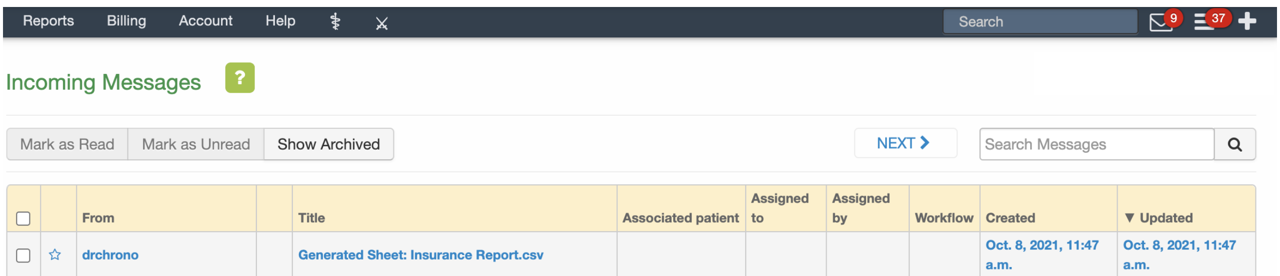


4. The reports will get generated in the message center. Click on the envelope icon(

) to access.



5. Click on the report to open it.



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

Reports Billing Account Help

Search 8 37

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