## How to Track Patients Who are Connected to OnPatient

07/24/2024 5:00 pm EDT

You can use the Advanced Report to generate a report of your patients who are using OnPatient.

## 1. Go to Reports > Advanced Report.

Reports	Billing	Account
PRACTICE	REPORTS	
Account /	′ User Repo	rt
Productiv	ity Report	
Reminder	Report	
Outgoing	Prescriptio	ns
Patient In	surance Au	thorization
Appointm	ent Report	
Telehealth	n Report	
Patient R	eport	
Commun	ication Log	Report
Medicatio	on Report	
Problem	Report	
Allergy Re	eport	
Labs Rep	ort	
Advanced	d Report	

## 2. Be sure the Patients tab is selected and select Patient Filters.

	d Report							
Appointments	Patients							
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No filters selected	1							
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Send Email	Create Patient Group	to File -						
		to File -	Last Name	DOP	Hama	Phone	Cell Phone	
Send Email C	Create Patient Group Export Provider Brendan Wilberton	to File - First Name Test	Last Name Amar	DOB	Home	Phone (	Cell Phone	
Chart ID	Provider	First Name		<b>DOB</b> 10/01/20			Cell Phone (410) 444-4444	
Chart ID AMTE000001	Provider Brendan Wilberton	First Name	Amar		000	(4		
Chart ID AMTE000001 APSA000001	Provider Brendan Wilberton Brendan Wilberton	First Name Test Sample	Amar Appointment	10/01/20	100	(4	(410) 444-4444	
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3. Click Patient Portal Enabled from the list of options that appear and Close.

## Patient Filter X Check All Uncheck All Primary Provider Primary Ins Payer Name Employer contains ALL of First Name Patient Portal Primary Ins Payer Name Enabled Middle Name contains ANY of Patient Portal Disabled Last Name Primary Ins Payer ID onpatient Connected Default Appointment Primary Ins Plan Name Payment Profile Profile contains ALL of Created After Patient Flag Primary Ins Plan Name Created Before Date of Last contains ANY of Appointment <= Patient Status Primary Ins Plan Type Patient Problem Address Primary Ins ID # contains ALL of Zipcode Secondary Ins Payer Patient Problem Name contains ALL of City contains ANY of Secondary Ins Payer State Patient Medication Name contains ANY of contains ALL of ... Close

4. This option will now appear as a selectable option. Select the **Patient Portal Enabled** and **Filter by Patient Only** and click **Update Filter**.

Advanced	Report
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Appointments	Patients							
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Send Email C	Create Patient Group Export Provider	to File - First Name	Last Name	DOB	Home Ph	one Ce	ell Phone	
			Last Name Bright	<b>DOB</b> 09/10/1971	Home Ph (844) 569-		ell Phone 50) 215-6343	3
Chart ID	Provider	First Name				8628 (65		
Chart ID BRCH000001	Provider Brendan Wilberton	First Name Chrissy	Bright	09/10/1971	(844) 569- (844) 569-	8628 (65 8628 (65	60) 215-6343	3
Chart ID BRCH000001 DJPE000001	Provider Brendan Wilberton James Smith	First Name Chrissy Peter	Bright Django	09/10/1971 12/21/1993	(844) 569- (844) 569-	8628 (65 8628 (65 443	60) 215-6343 60) 215-6343	3 i
Chart ID           BRCH000001           DJPE000001           DOJA000003	Provider Brendan Wilberton James Smith Brendan Wilberton	First Name Chrissy Peter Jack	Bright Django Doe	09/10/1971 12/21/1993 11/01/1989	(844) 569- (844) 569-	8628 (65 8628 (65 443 30	50) 215-6343 50) 215-6343 3-555-5555	3 j
Chart ID           BRCH000001           DJPE000001           DOJA000003           DOSA000002	Provider Brendan Wilberton James Smith Brendan Wilberton Brendan Wilberton	First Name Chrissy Peter Jack Sarah	Bright Django Doe Doe	09/10/1971 12/21/1993 11/01/1989 10/16/2018	(844) 569- (844) 569-	8628 (65 8628 (65 44; 30 8628 (65	60) 215-6343 60) 215-6343 3-555-5555 1-555-5555	3 j j 3 i

5. Select **Quick Export** from the **Export to File** dropdown.

Advanced	d Report					
Appointments	Patients					
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Filter by patie	ent only   Archived ex	Include	V   Breaks Excl	luded V Show	v 50 v per page	Jpdate Filter Save Filter
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			Last Name	DOB	V 50 V per page U	Jpdate Filter Save Filter
Send Email	reate Patient Group	Export to File - Quick Export				

6. You can name your report. Next, click **Export**.

Quick E	uick Export		×
	Report Name	OnPatient Report	
Cancel			Export

7. A report of your patients who are connected to OnPatient will be generated in the message center (
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Billing	Account Help 🗙						Search	<b></b> .
ncomi	ng Messages 🔋							
Mark as	Read Mark as Unread Show	Archived					NEXT > Search Me	ssages Q
	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	▼ Updated
	drchrono	Generated Sheet: OnPatient Report.csv					June 28, 2021, 2:51 p.m.	June 28, 2021, 2:51 p.m.