How do I run a report?

07/24/2024 4:15 pm EDT

DrChrono offers you several predefined reports and an easy way to create customized reports. Each predefined report has values already chosen for you. If you would like to add or remove a value you can create that report in the Advanced Report section.

Predefined Reports

1. Mouse over the **Reports** tab in the menu bar.

2. Choose which report you would like to run from the drop-down list. If you would like a more in-depth report, you may select **Advanced Report** which you may customize yourself. This is explained in more detail below.

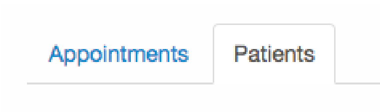
Please Note: There are many different ways you can customize your reports. You are given options to customize in the following categories: Patient Filters, Appointment Filters, Appointment Status, Billing Status, Copay Method, and Insurance Status.

Because there are many different ways to customize a report, we will be showing you one of our most requested reports. Follow the steps below to learn how to create a report showing what patients have birthdays for a particular month.

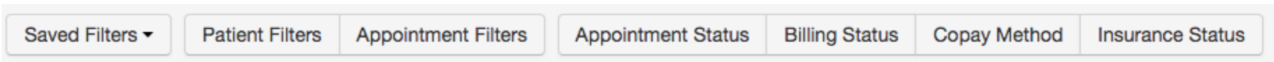
Using Advanced Reports

1. Mouse over the **Reports** tab in the menu bar and choose **Advanced Report** from the dropdown menu.

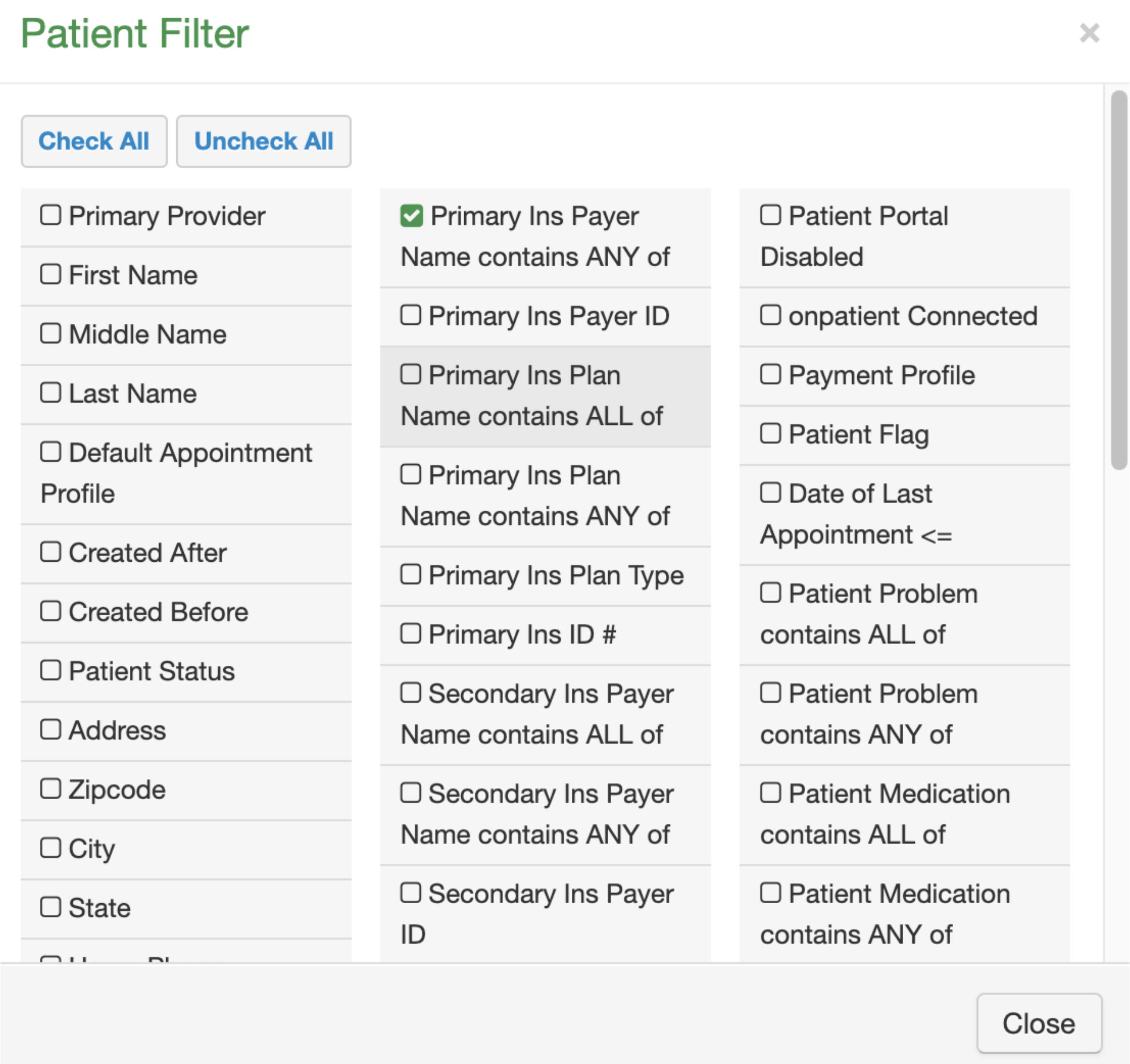
2. Select to report results for either **Appointments** or **Patients**.



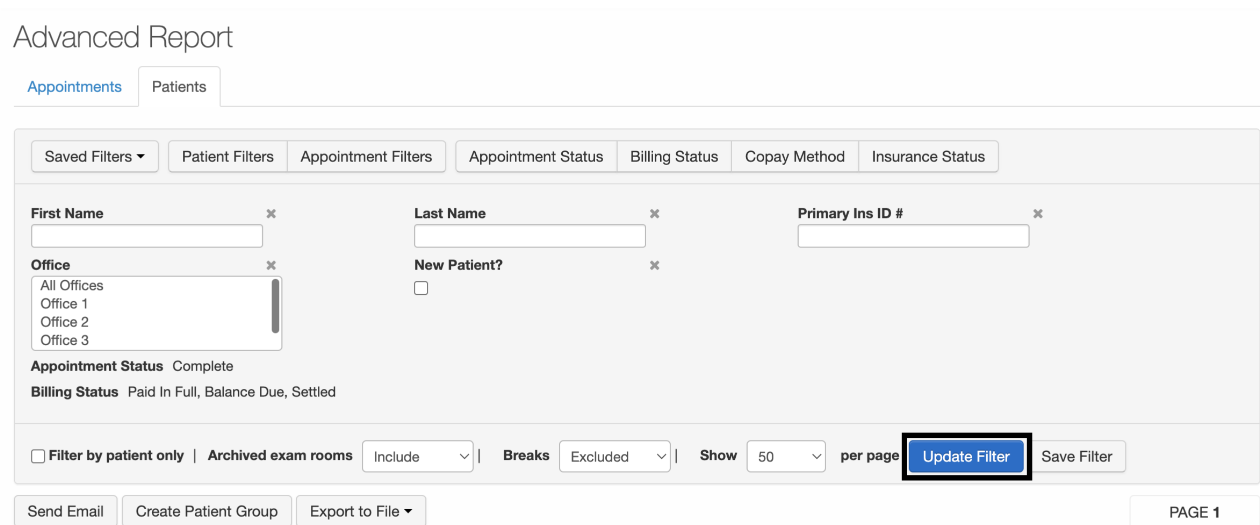
3. Several filters are available for you to narrow your results. Select the type of filter you would like to use.



4. When you select the type of filter you would like to use, a box will appear with all the filter options you can choose from. Check the filters you would like to add to your report.

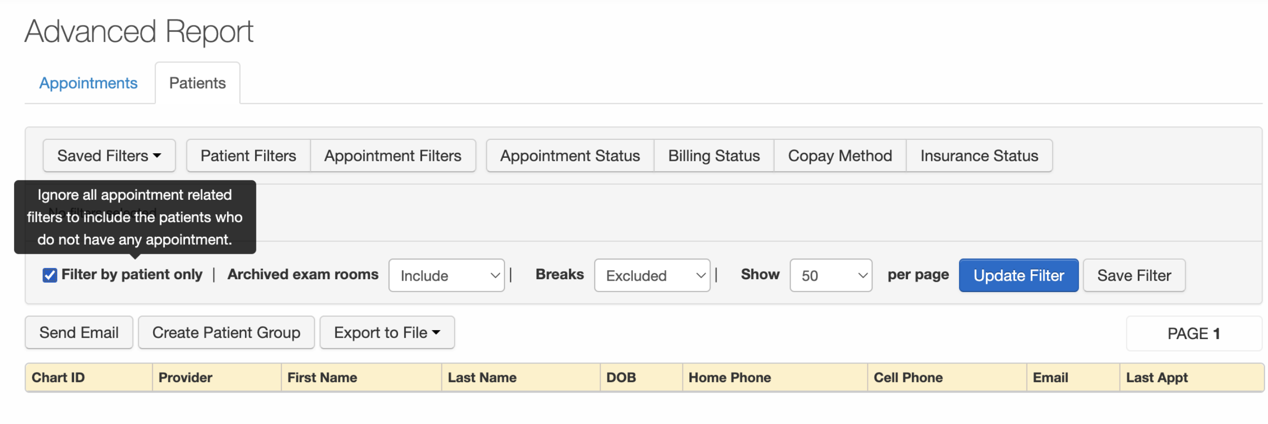


5. Filters will populate your reporting page. Specify your search criteria using the filters you have inserted, then select **Update Filter** to view a report with patients or appointments within those criteria.



Note: On the Advanced Report there is an option to **Filter by patient only.** By default, this option is not checked. When this option is unchecked, report data will include only patients with appointments. For example, a patient who is in your account but does not have any appointment data would not be included in your report results.

If you would like your report to include ALL patients regardless of appointment, check the **Filter by patient-only** box.

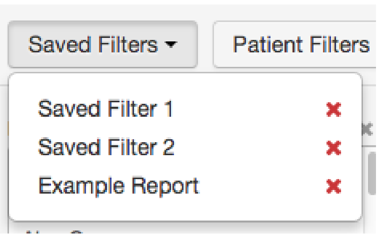


Other Reporting Actions

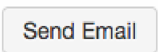
Once you have your list populated you are given a couple of options.

Save Filters - This will save your current report to view at a later date which can be found under the Saved Filters dropdown menu.

After you save a filter, you will be able to find your filter in the upper-left-hand corner of the advanced report page.



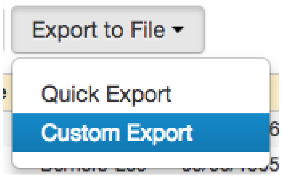
Send Email - This will allow you to send an email to all the patients in the newly generated report



Create Patient Group - This gives you the option to create a patient group will every patient in the report.

Export to File - This will export your results into a CSV spreadsheet file and will be delivered to your message center.

- **Quick Export** will export the results of your search to a CSV
- **Custom Export** will allow you to specify which filters to export to a CSV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