How to run a report based on the appointment's payment profile

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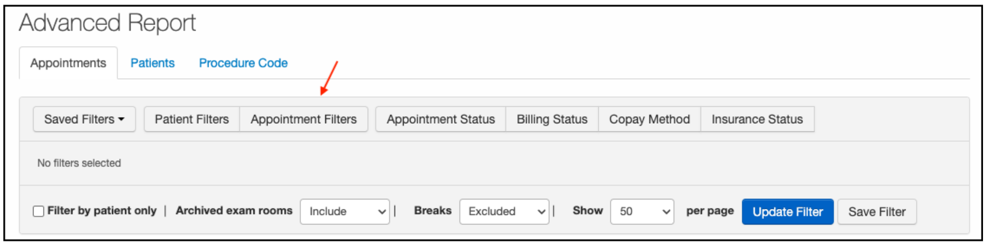
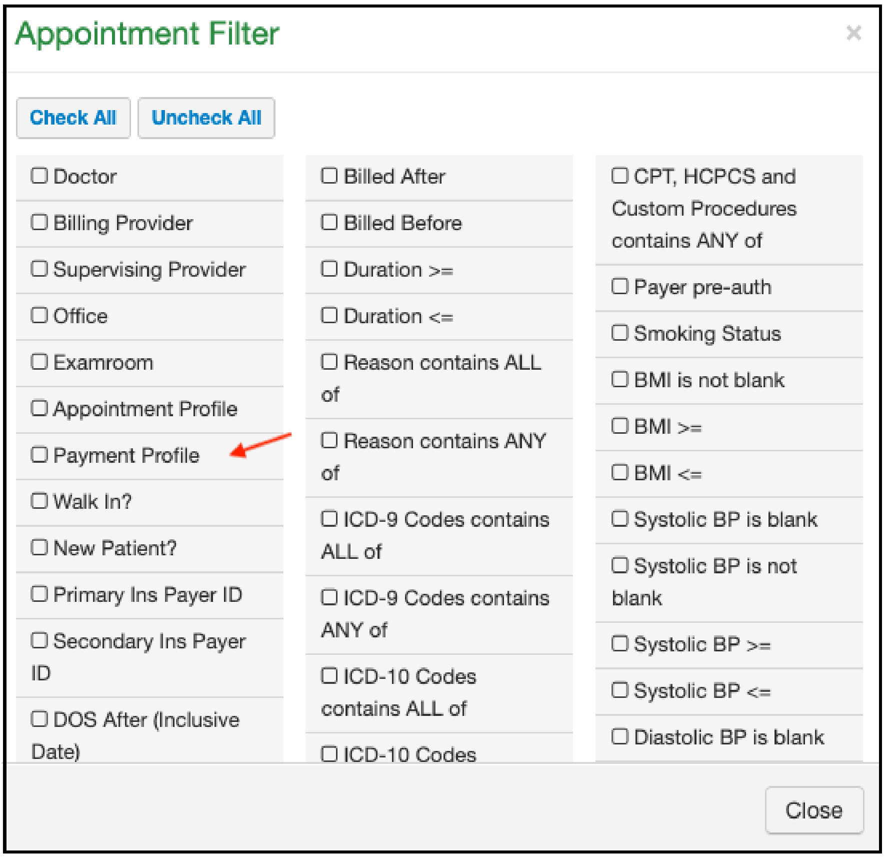
An option has been added to Advanced Reports that allows you to generate a report based on an appointment’s payment profile. This feature enables you to pull reports for appointments categorized by payment type, including cash, insurance, out-of-network insurance, auto accident, or workers’ compensation. This enhancement provides greater flexibility for financial analysis and reporting.

Video Walkthrough

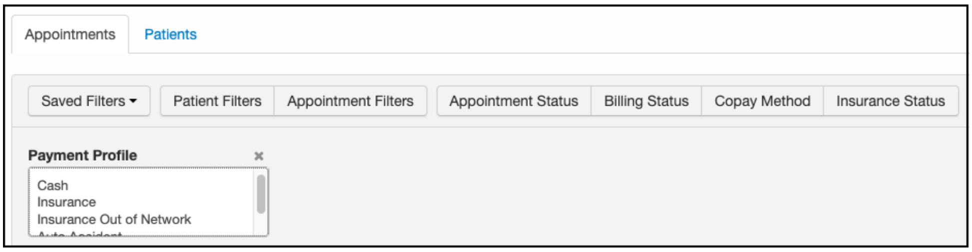
1. Hover over **Reports** and select **Advanced Report**
2. Select Appointment Filters



3. Select Payment Profile (and any other fields you would like to see on your report.



4. You can select 1 or more payment profile options for your report.



Video Walkthrough