

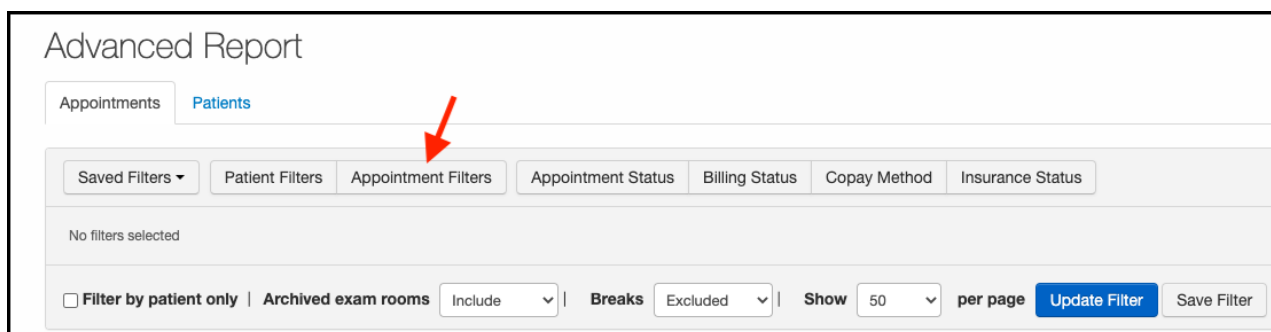
# How to run a report based on the appointment's payment profile

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An option has been added to advanced reports that will allow you to pull a report based on an appointment's payment profile.

You could pull a report of all appointments that have a payment profile of cash, insurance, out-of-network insurance, auto accident, or workers' comp.

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



The screenshot shows the 'Advanced Report' interface. At the top, there are two tabs: 'Appointments' and 'Patients'. Below the tabs is a horizontal bar with several filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. A red arrow points to the 'Appointment Filters' tab. Below this bar, it says 'No filters selected'. At the bottom of the interface, there are several options: a checkbox for 'Filter by patient only', 'Archived exam rooms' with a dropdown set to 'Include', 'Breaks' with a dropdown set to 'Excluded', 'Show 50 per page', and two buttons: 'Update Filter' and 'Save Filter'.

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

### Appointment Filter ×

<input type="checkbox"/> Doctor	<input type="checkbox"/> Billed After	<input type="checkbox"/> CPT, HCPCS and Custom Procedures contains ANY of
<input type="checkbox"/> Billing Provider	<input type="checkbox"/> Billed Before	<input type="checkbox"/> Smoking Status
<input type="checkbox"/> Office	<input type="checkbox"/> Duration >=	<input type="checkbox"/> BMI is not blank
<input type="checkbox"/> Examroom	<input type="checkbox"/> Duration <=	<input type="checkbox"/> BMI >=
<input type="checkbox"/> Appointment Profile	<input type="checkbox"/> Reason contains ALL of	<input type="checkbox"/> BMI <=
<input type="checkbox"/> Payment Profile	<input type="checkbox"/> Reason contains ANY of	<input type="checkbox"/> Systolic BP is blank
<input type="checkbox"/> Walk In?	<input type="checkbox"/> ICD-9 Codes contains ALL of	<input type="checkbox"/> Systolic BP is not blank
<input type="checkbox"/> New Patient?	<input type="checkbox"/> ICD-9 Codes contains ANY of	<input type="checkbox"/> Systolic BP >=
<input type="checkbox"/> Primary Ins Payer ID	<input type="checkbox"/> ICD-10 Codes contains ALL of	<input type="checkbox"/> Systolic BP <=
<input type="checkbox"/> Secondary Ins Payer ID	<input type="checkbox"/> ICD-10 Codes	<input type="checkbox"/> Diastolic BP is blank
<input type="checkbox"/> DOS After (Inclusive Date)		<input type="checkbox"/> Diastolic BP is not
<input type="checkbox"/> DOS Before (Inclusive		

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

**Payment Profile** ×

- Cash
- Insurance
- Insurance Out of Network
- Auto Accident