

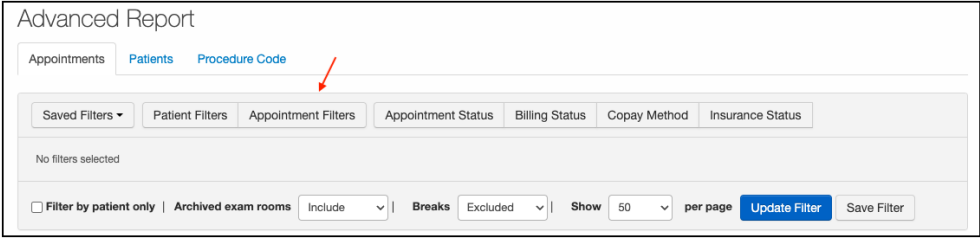
How to run a report based on the appointment's payment profile

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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



The screenshot shows the 'Advanced Report' interface. At the top, there are three tabs: 'Appointments', 'Patients', and 'Procedure Code'. Below these tabs is a row of filter categories: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copoly Method', and 'Insurance Status'. A red arrow points to the 'Appointment Filters' tab. Below the filter categories, it says 'No filters selected'. At the bottom, there is a section for 'Filter by patient only' with a checkbox, 'Archived exam rooms' with a dropdown menu set to 'Include', 'Breaks' with a dropdown menu set to 'Excluded', 'Show' with a dropdown menu set to '50', and 'per page'. There are also 'Update Filter' and 'Save Filter' buttons.

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

Appointment Filter

Check All
Uncheck All

<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"/> Payer pre-auth
<input type="checkbox"/> Supervising Provider	<input type="checkbox"/> Duration >=	<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"/> Reason contains ALL of	<input type="checkbox"/> BMI >=
<input type="checkbox"/> Appointment Profile	<input type="checkbox"/> Reason contains ANY of	<input type="checkbox"/> BMI <=
<input type="checkbox"/> Payment Profile	<input type="checkbox"/> ICD-9 Codes contains ALL of	<input type="checkbox"/> Systolic BP is blank
<input type="checkbox"/> Walk In?	<input type="checkbox"/> ICD-9 Codes contains ANY of	<input type="checkbox"/> Systolic BP is not blank
<input type="checkbox"/> New Patient?	<input type="checkbox"/> ICD-10 Codes contains ALL of	<input type="checkbox"/> Systolic BP >=
<input type="checkbox"/> Primary Ins Payer ID	<input type="checkbox"/> ICD-10 Codes contains ANY of	<input type="checkbox"/> Systolic BP <=
<input type="checkbox"/> Secondary Ins Payer ID		<input type="checkbox"/> Diastolic BP is blank
<input type="checkbox"/> DOS After (Inclusive Date)		

Close

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

Appointments
Patients

Saved Filters
Patient Filters
Appointment Filters
Appointment Status
Billing Status
Copay Method
Insurance Status

Payment Profile
Cash
Insurance
Insurance Out of Network

Video Walkthrough