

Running Reports from the Live Claims Feed

Last modified on 11/11/2024 2:02 pm EST

The Live Claims Feed (LCF) allows you to create reports that contain any combination of many available fields. They can be configured in countless ways to meet your workflow and needs.

1. To access, navigate to **Billing > Live Claims Feed**.
2. Select the **Custom Export Button**, located just above the patient information.

The screenshot shows the 'Live Claims Feed' interface. At the top, there are several filter buttons: 'Select All Offices', 'Select None', 'C new office All', 'Primary Office All', and 'Test office All'. Below these are more filters: 'Claim Type All', 'Claim St' (with three colored circles), 'Billing St: All', and 'Appt Profiles: All'. A 'Calculate Counts' button and a 'What's this?' link are also present. The main area contains input fields for 'Patient', 'Payer Name', 'Payer ID', 'drc claim #', 'From', 'To', and 'Clinical Note'. There are also checkboxes for 'Open window in new tab' and 'Exclude future follow-up dates'. At the bottom, there are buttons for 'Batch Status Change', 'Export to File', 'Custom Export' (highlighted with a red arrow), 'Display', and '+ Schedule'.

3. Select the fields you want on your report and press **Export**.

The screenshot shows the 'Custom Export' dialog box. It has a title bar with a close button. Below the title, there are 'Check All' and 'Uncheck All' buttons. The main area is a list of fields under the heading 'Patient'. The 'Full Name' field is checked, while all other fields are unchecked. The fields include: Full Name, First Name, Last Name, Chart ID, Date of Birth, Primary Provider, Home Phone, Cell Phone, Office Phone, Email, Gender, Race, Ethnicity, Primary Ins Group #, Secondary Ins Payer, Secondary Ins Payer ID, Secondary Member ID, Secondary Ins Plan Name, Secondary Ins Group #, Auto Insurance Payer, Auto Insurance Payer ID, Auto Insurance Case #, Worker's Comp Payer, Worker's Comp Payer ID, Worker's Comp Case #, and Emerg Contact Name. An 'Export' button is located at the bottom right of the dialog.

The report will be generated as a spreadsheet (.csv) and placed in your message center for download.

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<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated	Download
<input type="checkbox"/>	☆ drchrono	Generated Sheet: custom_live_claims_report_11112024.csv					Nov. 11, 2024, 1:56 p.m.	Nov. 11, 2024, 1:56 p.m.	Download

You can also open the message and download the spreadsheet report.

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From: drchrono

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Previewing generated file limited to 100 rows. Download the full report to view all rows.

Full Name	Chart ID	Primary Provider	Ref Source	Employer	Employer Zip Code	Claim ID	Date of Service	Office	Examroom	Provider	Supervising Provider	Appt Profile	Appt Status	Reason	Billed Time	Billing Status
Jenny (Jen) Harris	HAJE000001			Apple	95014	328340191	10/29/2024 09:15AM	Primary Office	Exam 1						2024-10-29 09:15:00	Balance Due
Jenny Harris	HAJE000002					328821561	11/01/2024 08:00AM	Primary Office	Exam 1						2024-11-01 08:00:00	