Reporting on Custom Demographics

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Reports on custom demographics can be generated under the Advanced Report feature in the Reports menu.

1. Go to Reports > Advanced Report

Reports	Billing	Account		
PRACTICE	REPORTS			
Account /	User Repo	rt		
Productivity Report				
Reminder Report				
Outgoing Prescriptions				
Patient Insurance Authorization				
Appointment Report				
Telehealth Report				
Patient Report				
EHI Data Export				
Communication Log Report				
Medicatio	n Report			
Problem Report				
Allergy Report				
Labs Rep	ort			
Advanced	l Report			
Patient Pa	ayment Plar	Report		

2. Once in the reports screen, there are two options to run a report on custom demographics.

Option 1

Go to Patient Filters.

User Report	Advanced Report
Productivity Report	Appointments Patients Procedure Code
Reminder Report	
Outgoing Prescription	Saved Filters Patient Filters Appointment Filters Billing Status Copay Method Insurance Status
Patient Insurance Authorization	No filters selected
Appointment Report	Filter by patient only Archived exam rooms Include v Breaks Excluded v Show 50 v per page Update Filter Save Filter
Telehealth Report	
Patient Report	Send Email Create Patient Group Export to File -
EHI Data Export	Chart ID Provider First Name Last Name DOB Home Phone Cell Phone Email Last Appt

In the patient filters menu, the custom demographics are located on the right side of the menu.

Patient Filter

Office Phone	Name contains ANY of	contains ALL of			
Email is blank	□ Secondary Ins Plan	Patient Allergy			
No Credit Card on	lype				
File	Secondary Ins ID #	Lab lest			
DOB After	First DOS After	Lab Test Result			
DOB Before	First DOS Before	contains ALL Of			
Month of DOB	Last DOS After	Lab Test Result contains ANY of			
Day of DOB	□ Last DOS Before	□ Lab Test Result >= □ Lab Test Result <=			
Sex	Referring Dr. First				
Ethnicity		□ What is your			
Race	 Referring Dr. Last Name 	preferred pharmacy			
Preferred	Referring Source	DL Number			
Communication		Room Number			
Primary Ins Payer Name contains ALL of		Test Demographic			

Select the filters you would like to generate a report on and click Close. Select Update Filter once complete.

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Option 2

Go to Export to File > Custom Export.

Advanced Report

Appointments	Patients	Procedure	e Code							
Saved Filters	Patient	Filters	Appointment Filters	Appointment St	tatus Billin	ng Status	Copay Method	Insurance Status		
No filters selecte	ed									
Filter by pat	ent only Arc	hived exan	n rooms Include	→ Breaks	Excluded	∼ Shov	v 50 ~ p	er page Update Filte	r Save Filt	er
Send Email	Create Patient	Group	Export to File -	7						
Chart ID	Provider	Firs	Quick Export	lanie	DOB	Home Pho	one	Cell Phone	Email	Last Appt
			Custom Export							

The custom demographics are on the right. Select the demographics for the report and any other filters. Click **Export** when complete. The report will generate in the message center.

	Primary Ins Payer ID #	CTICI DI TAX		
Cell Phone	Primary Ins Plan Name	Ref Source		
Office Phone	Primary Ins Group #	Employer		
Email	Secondary Ins Payer	Employer Zip Code		
Gender	Secondary Ins Payer ID	Employer Address		
Race	Secondary Ins Payer ID #	Employer City Employer State		
Ethnicity	Secondary Ins Plan Name			
Marital Status	Secondary Ins Group #	Copay		
Address	Auto Insurance Payer	Primary Care Physician		
City	Auto Insurance Payer ID	Patient Flags		
□ State	Auto Insurance Case #	What is your preferred		
Zip Code	UWorker's Comp Payer	pharmacy		
Mailing Address	Worker's Comp Payer ID	DL Number		
Mailing City	Worker's Comp Case #	Room Number		
Mailing State		Test Demographic		