How do I run a report with the list of patients' insurances?
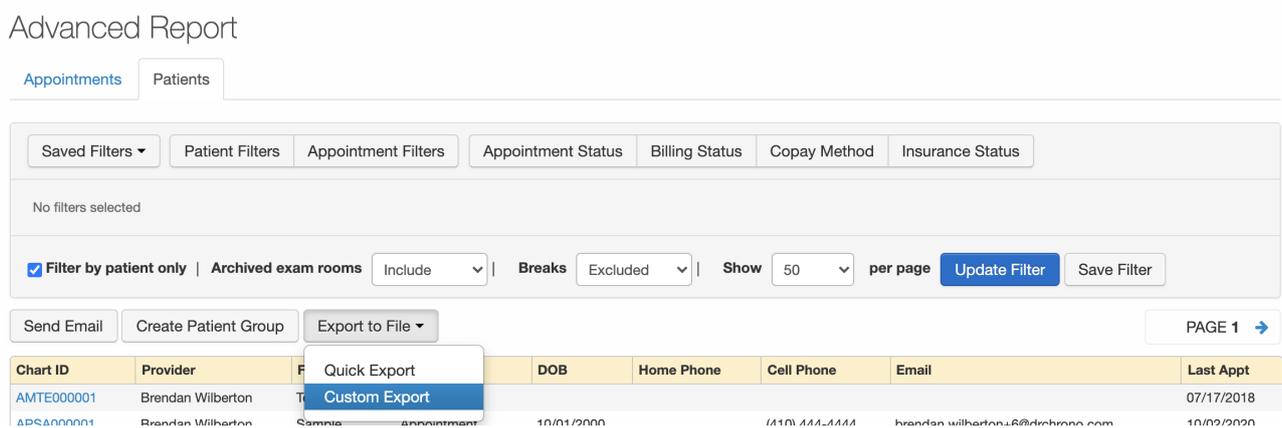
07/08/2024 7:35 pm EDT

You can easily run a report to gather a spreadsheet of patients and their insurance information.

1. Hover your cursor on **Reports** and choose **Advanced Report**.

2. Click on **Export to File** and select **Custom Export**.

3. Select the required fields under the **Patient** (For example, first name, last name, primary and secondary ins payer). You can also rename the report. When finished, select **Export**.

Custom Export

Report Name Insurance Report

Patient (9)   Doctor

Check All   **Uncheck All**

- ☐ Full Name
- ☑ First Name
- ☑ Last Name
- ☐ Chart ID
- ☑ Date of Birth
- ☐ Primary Provider
- ☐ Home Phone
- ☐ Cell Phone
- ☐ Office Phone
- ☐ Email

- ☐ Date of First Appointment
- ☐ Date of Last Appointment
- ☐ Date of Next Appointment
- ☑ Primary Ins Payer
- ☐ Primary Ins Payer ID
- ☐ Primary Member ID
- ☐ Primary Ins Plan Name
- ☐ Primary Ins Group #
- ☑ Secondary Ins Payer
- ☐ Secondary Ins Payer ID

- ☐ Emerg Contact Relation
- ☐ Referring Doctor
- ☐ Ref Dr. Email
- ☐ Ref Dr. Phone
- ☐ Ref Dr. Fax
- ☐ Ref Source
- ☐ Employer
- ☐ Employer Zip Code
- ☐ Employer Address
- ☐ Employer City

Close   **Export**

4. The reports will get generated in the message center. Click on the envelope icon(

) to access.

5. Click on the report to open it.

6. From here, you can view or download a spreadsheet of the report.

< Back to Messages | Mark as Unread | Archive Message

< >   Search Messages   🔍

👤 Generated Sheet: Insurance Report.csv   Create task

From: drchrono   **Friday, October 08, 2021 11:47 AM**

🖨 Save Attachment to Patient Chart | ⊕ Download Document | 🗐 Audit Log   ☆

Notes

➕ Add

First Name	Last Name	Date of Birth	Address	City	State	Zip Code	Primary Ins Payer	Secondary Ins Payer

< Back to Messages | Mark as Unread | Archive Message

< >   Search Messages   🔍

👤 Generated Sheet: Insurance Report.csv   Create task

From: drchrono   **Friday, October 08, 2021 11:47 AM**

🖨 Save Attachment to Patient Chart | ⊕ Download Document | 🗐 Audit Log