How do I run a report with the list of patients' insurances?

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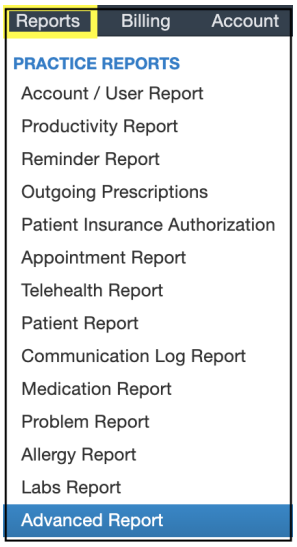
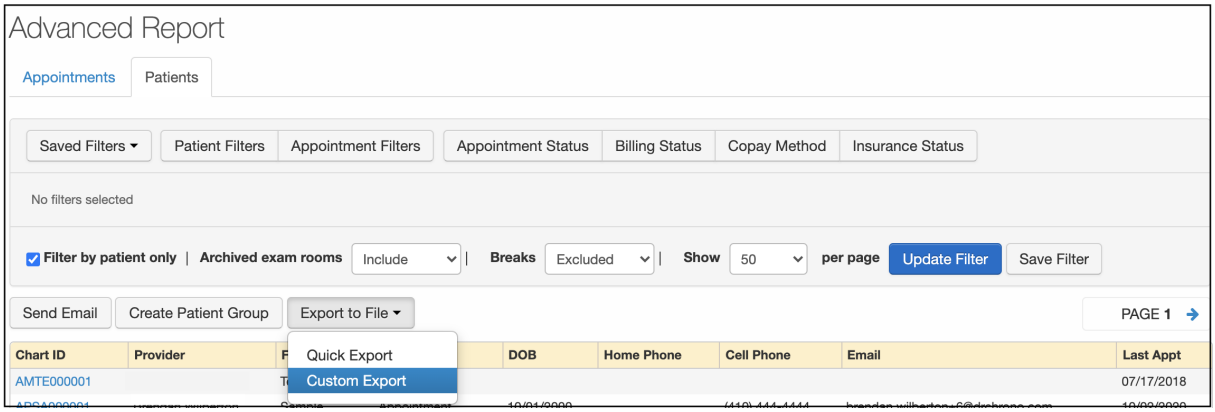
You can quickly generate a report to download a spreadsheet of patients and their associated insurance information. This report provides an organized view of coverage details, making it easier to review, audit, or update patient records. Exporting the data to a spreadsheet also allows your team to sort and filter information as needed for billing or administrative tasks.

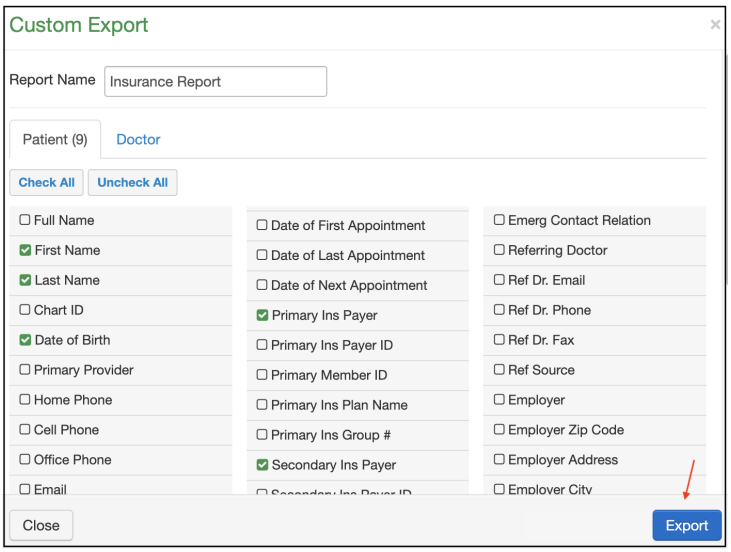
1. Hover your cursor over **Reports** and choose **Advanced Report**.



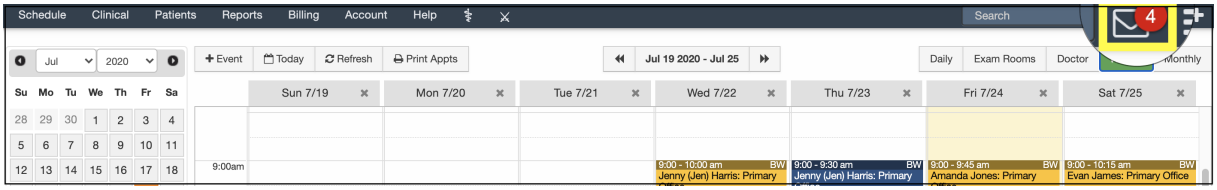
2. Select **Export to File** and **Custom Export**.



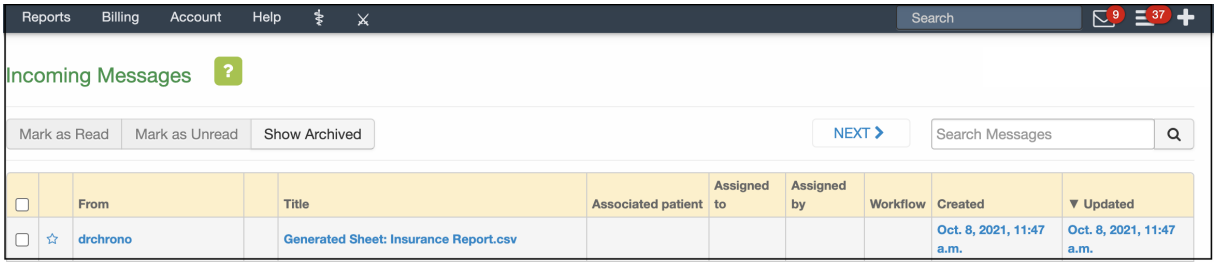
3. Select the required fields under the **Patient** (For example, first name, last name, primary and secondary insurance payer). You can also rename the report. When finished, select **Export**.



4. The reports will be generated in the message center. Press the envelope icon to access.



5. Press the report to open it.



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

