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

Last modified on 02/24/2026 10:35 am EST

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 on **Reports** and choose **Advanced Report**.

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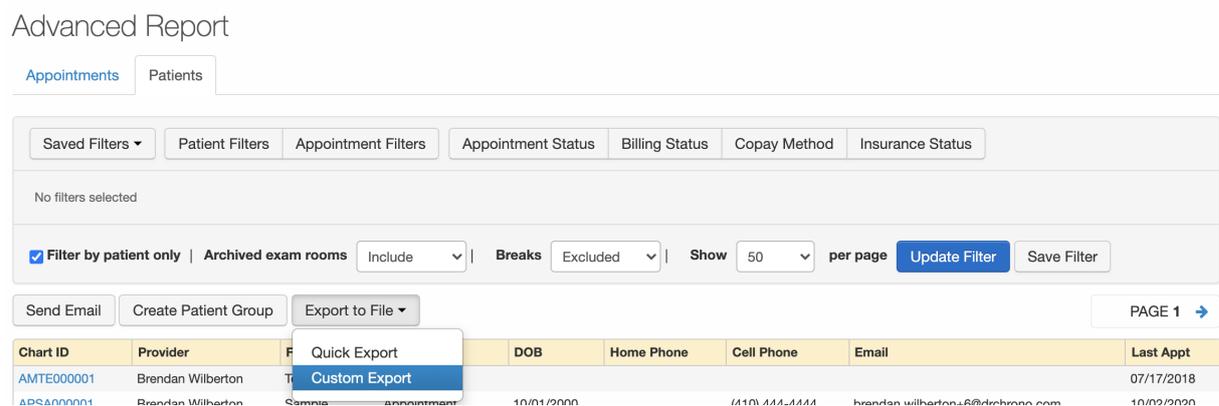
3. Select the required fields under the **Patient** (For example, first name, last name, primary and secondary ins payer). You can also rename the report. When finished, select **Export**.

Custom Export ✕

Report Name [Insurance Report]

Patient (9)   Doctor

[Check All] [Uncheck All]

☐ Full Name   ☐ Date of First Appointment   ☐ Emerg Contact Relation
☑ First Name   ☐ Date of Last Appointment   ☐ Referring Doctor
☑ Last Name   ☐ Date of Next Appointment   ☐ Ref Dr. Email
☐ Chart ID   ☑ Primary Ins Payer   ☐ Ref Dr. Phone
☑ Date of Birth   ☐ Primary Ins Payer ID   ☐ Ref Dr. Fax
☐ Primary Provider   ☐ Primary Member ID   ☐ Ref Source
☐ Home Phone   ☐ Primary Ins Plan Name   ☐ Employer
☐ Cell Phone   ☐ Primary Ins Group #   ☐ Employer Zip Code
☐ Office Phone   ☑ Secondary Ins Payer   ☐ Employer Address
☐ Email   ☐ Secondary Ins Payer ID   ☐ Employer City

[Close]   [Export]

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

5. Press on the report to open it.

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

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