

# Generating a Report of Patients with Addresses and Other Demographic Information

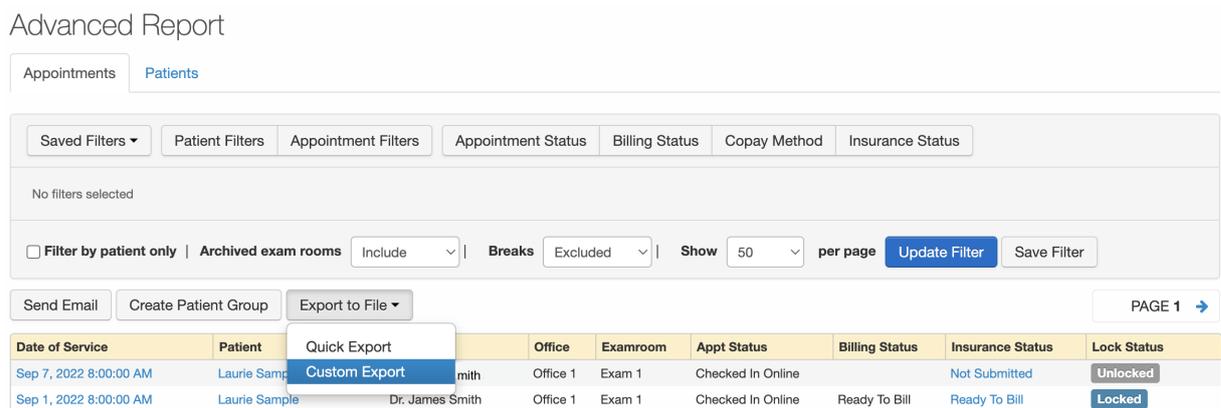
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1. Hover your cursor over **Reports** and select **Advanced Report**.



The screenshot shows a navigation menu with three main categories: Reports, Billing, and Account. Under the Reports category, there is a sub-section titled 'PRACTICE REPORTS' which lists the following options: Account / User Report, Productivity Report, Reminder Report, Outgoing Prescriptions, Patient Insurance Authorization, Appointment Report, Telehealth Report, Patient Report, Communication Log Report, Medication Report, Problem Report, Allergy Report, Labs Report, Advanced Report, and Patient Payment Plan Report.

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



The screenshot displays the 'Advanced Report' interface. At the top, there are tabs for 'Appointments' and 'Patients'. Below the tabs is a filter section with buttons for 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. A message states 'No filters selected'. Below this is a section for filtering by patient only, with options for 'Archived exam rooms' (Include/Exclude) and 'Breaks' (Excluded). There is also a 'Show' dropdown set to '50 per page' and buttons for 'Update Filter' and 'Save Filter'. At the bottom, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File'. The 'Export to File' dropdown menu is open, showing 'Quick Export' and 'Custom Export' options. Below the menu is a table with columns: Date of Service, Patient, Office, Examroom, Appt Status, Billing Status, Insurance Status, and Lock Status. The table contains two rows of data.

Date of Service	Patient	Office	Examroom	Appt Status	Billing Status	Insurance Status	Lock Status
Sep 7, 2022 8:00:00 AM	Laurie Sample	Dr. James Smith	Office 1	Exam 1	Checked In Online	Not Submitted	Unlocked
Sep 1, 2022 8:00:00 AM	Laurie Sample	Dr. James Smith	Office 1	Exam 1	Checked In Online	Ready To Bill	Locked

3. Select the options you would like to include in your report and press **Export**. The report will be generated and will be available in your message center.

## Custom Export



<input checked="" type="checkbox"/> Full Name	<input type="checkbox"/> Mailing Zip Code	<input type="checkbox"/> Emerg Contact Phone
<input type="checkbox"/> First Name	<input type="checkbox"/> Date of First Appointment	<input type="checkbox"/> Emerg Contact Relation
<input type="checkbox"/> Last Name	<input type="checkbox"/> Date of Last Appointment	<input type="checkbox"/> Referring Doctor
<input type="checkbox"/> Chart ID	<input type="checkbox"/> Date of Next Appointment	<input type="checkbox"/> Ref Dr. Email
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Primary Ins Payer	<input type="checkbox"/> Ref Dr. Phone
<input type="checkbox"/> Primary Provider	<input type="checkbox"/> Primary Ins Payer ID	<input type="checkbox"/> Ref Dr. Fax
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Primary Member ID	<input type="checkbox"/> Ref Source
<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Primary Ins Plan Name	<input type="checkbox"/> Employer
<input type="checkbox"/> Office Phone	<input type="checkbox"/> Primary Ins Group #	<input type="checkbox"/> Employer Zip Code
<input type="checkbox"/> Email	<input type="checkbox"/> Secondary Ins Payer	<input type="checkbox"/> Employer Address
<input type="checkbox"/> Gender	<input type="checkbox"/> Secondary Ins Payer ID	<input type="checkbox"/> Employer City
<input type="checkbox"/> Race	<input type="checkbox"/> Secondary Member ID	<input type="checkbox"/> Employer State
<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Secondary Ins Plan Name	<input type="checkbox"/> Expected Copay
<input type="checkbox"/> Marital Status	<input type="checkbox"/> Secondary Ins Group #	<input type="checkbox"/> Primary Care Physician
<input checked="" type="checkbox"/> Address	<input type="checkbox"/> Auto Insurance Payer	<input type="checkbox"/> Patient Flags