

How to Track Patients Who are Connected to OnPatient

07/08/2024 7:37 pm EDT

You can use the Advanced Report to generate a report of your patients who are using OnPatient.

1. Go to Reports > Advanced Report.

Reports Billing Account

PRACTICE REPORTS

- 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**

2. Be sure the Patients tab is selected and select Patient Filters.

Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

No filters selected

Filter by patient only | Archived exam rooms Include Breaks Excluded Show 50 per page Update Filter Save Filter

Send Email Create Patient Group Export to File

Chart ID	Provider	First Name	Last Name	DOB	Home Phone	Cell Phone
AMTE000001	Brendan Wilberton	Test	Amar			
APSA000001	Brendan Wilberton	Sample	Appointment	10/01/2000		(410) 444-4444
APTU000001	Brendan Wilberton	Tuesday	Appt	08/01/1998		210-555-5555
BIPA000001	Brendan Wilberton	Paper	Bill	03/04/1978		
BOHO000001	Brendan Wilberton	Homer	Botox	02/01/1992		(301) 555-5555
BRCH000001	Brendan Wilberton	Chrissy	Bright	09/10/1971	(844) 569-8628	(650) 215-6343
CACA000001	Brendan Wilberton	Carl	Carlson	09/03/1952	(240) 555-5555	(301) 555-5555

3. Click Patient Portal Enabled from the list of options that appear and Close.

Patient Filter



Check All **Uncheck All**

Primary Provider	Primary Ins Payer Name contains ALL of	Employer
First Name	Primary Ins Payer Name contains ANY of	<input checked="" type="checkbox"/> Patient Portal Enabled
Middle Name	Primary Ins Payer ID	Patient Portal Disabled
Last Name	Primary Ins Plan Name contains ALL of	onpatient Connected
Default Appointment Profile	Primary Ins Plan Name contains ANY of	Payment Profile
Created After	Primary Ins Plan Type	Patient Flag
Created Before	Primary Ins ID #	Date of Last Appointment <=
Patient Status	Secondary Ins Payer Name contains ALL of	Patient Problem contains ALL of
Address	Secondary Ins Payer Name contains ANY of	Patient Problem contains ANY of
Zipcode		Patient Medication contains ALL of
City		
State		

Close

4. This option will now appear as a selectable option. Select the **Patient Portal Enabled** and **Filter by Patient Only** and click **Update Filter**.

Advanced Report

Appointments Patients

Saved Filters ▾ Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

Patient Portal Enabled ✕



Filter by patient only | Archived exam rooms Include ▾ | Breaks Excluded ▾ | Show 50 ▾ per page **Update Filter** Save Filter

Send Email Create Patient Group Export to File ▾

Chart ID	Provider	First Name	Last Name	DOB	Home Phone	Cell Phone
BRCH000001	Brendan Wilberton	Chrissy	Bright	09/10/1971	(844) 569-8628	(650) 215-6343
DJPE000001	James Smith	Peter	Django	12/21/1993	(844) 569-8628	(650) 215-6343
DOJA000003	Brendan Wilberton	Jack	Doe	11/01/1989		443-555-5555
DOSA000002	Brendan Wilberton	Sarah	Doe	10/16/2018		301-555-5555
HAJE000001	James Smith	Jenny	Harris	02/11/1980	(844) 569-8628	(650) 215-6343
JAED000001	Brendan Wilberton	Edward	James	01/02/1964	(844) 569-8628	(650) 215-6343
JOAM000001	Brendan Wilberton	Amanda	Jones	08/23/1977	(844) 569-8628	(650) 215-6343

5. Select **Quick Export** from the **Export to File** dropdown.

Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

Patient Portal Enabled

Filter by patient only | Archived exam rooms Include | Breaks Excluded | Show 50 per page Update Filter Save Filter

Send Email Create Patient Group Export to File

Chart ID	Provider	Quick Export	Last Name	DOB	Home Phone	Cell Phone
BRCH000001	Brendan Wilberton	Custom Export	Bright	09/10/1971	(844) 569-8628	(650) 215-6343

6. You can name your report. Next, click **Export**.

Quick Export

Report Name

7. A report of your patients who are connected to OnPatient will be generated in the message center (



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Billing Account Help Search 7 16

Incoming Messages

Mark as Read Mark as Unread Show Archived NEXT Search Messages

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated Sheet: OnPatient Report.csv					June 28, 2021, 2:51 p.m.	June 28, 2021, 2:51 p.m.