

How do I run a report?

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DrChrono offers you several predefined reports and an easy way to create customized reports. Each predefined report has values already chosen for you. If you would like to add or remove a value, you can create a report that meets your needs in the Advanced Report section.

Predefined Reports

1. Mouse over the **Reports** tab in the menu bar.
2. Choose which report you would like to run from the drop-down list. If you would like a more in-depth report, you may select **Advanced Report** which you may customize yourself. This is explained in more detail below.



Please Note: There are many different ways you can customize your reports. You are given options to customize in the following categories: Patient Filters, Appointment Filters, Appointment Status, Billing Status, Copay Method, and Insurance Status.

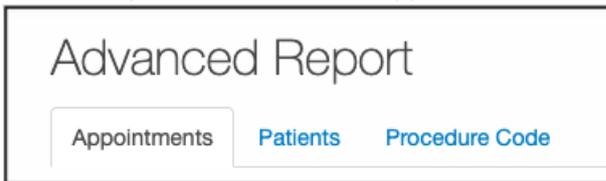
Because there are many different ways to customize a report, we will be showing you one of our most requested reports. Follow the steps below to learn how to create a report showing what patients have birthdays for a particular month.

Using Advanced Reports

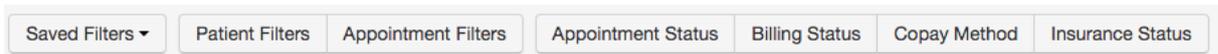
1. Mouse over the **Reports** tab in the menu bar and choose **Advanced Report** from the dropdown menu.



2. Select to report results for either **Appointments, Patients, or Procedure Code**.



3. Several filters are available for you to narrow your results. Select the type of filter you would like to use.



4. When you select the type of filter you would like to use, a box will appear with all the filter options you can choose from. Check the filters you would like to add to your report.

Patient Filter



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

5. Filters will populate your reporting page. Specify your search criteria using the filters you have inserted, then select **Update Filter** to view a report with patients or appointments within those criteria.

Advanced Report

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

First Name × Last Name × Primary Ins ID # ×

Office ×
All Offices
Office 1
Office 2
Office 3

New Patient? ×

Appointment Status Complete
Billing Status Paid In Full, Balance Due, Settled

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

PAGE 1

Note: On the Advanced Report there is an option to **Filter by patient only**. By default, this option is not checked. When this option is unchecked, report data will include only patients with appointments. For example, a patient who is in your account but does not have any appointment data would not be included in your report results.

6. If you would like your report to include ALL patients regardless of appointment, check the **Filter by patient-only** box.

Advanced Report

Appointments Patients

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

Ignore all appointment related filters to include the patients who do not have any appointment.

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 PAGE 1

Chart ID	Provider	First Name	Last Name	DOB	Home Phone	Cell Phone	Email	Last Appt
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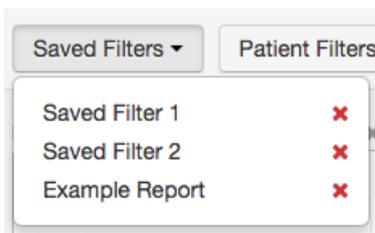
Other Reporting Actions

Once you have your list populated, you are given a couple of options.

1. **Save Filters** - This will save your current report to view at a later date which can be found under the Saved Filters dropdown menu.



2. After you save a filter, you will be able to find your filter in the upper-left-hand corner of the advanced report page.



3. **Send Email** - This will allow you to send an email to all the patients in the newly generated report.



4. **Create Patient Group** - This gives you the option to create a patient group with every patient in the report.



5. **Export to File** - This will export your results into a CSV spreadsheet file and will be delivered to your message

center.

- a. **Quick Export** will export the results of your search to a CSV
- b. **Custom Export** will allow you to specify which filters to export to a CSV

