About Patient Reports

Use the Patients reports to access information about patients associated with the practice.

These reports are located in the Patients section of the Reports menu, and include:

- **Patients Summary** - This report shows a summary of patients over a period of time.
- **Patient Transactions Summary** - This report shows a list of patients with summary transaction information for a period of time.
- **Patient Transactions Detail** - This report shows a list of patients with detailed transaction information for a period of time.
- **Patient Balance Summary** - This report shows a total of all charges with an open balance for each patient.
- **Patient Balance Detail** - This report shows the specific charges that make up each patient's open balance.
- **Patient Statement** - This report provides a current patient statement for a specific patient.
- **Patient Financial History** - This report provides a financial history of a patient.
- **Patient Detail** - This report provides a patient's details, including demographics and insurance information.
- **Patient Referrals Summary** - This report lists the referring providers, the number of patients referred, and the total charges generated by those patients for a period of time.
- **Patient Referrals Detail** - This report lists the patients referred by referring providers and the total charges generated by those patients; grouped by provider, then by service location, then by referring provider for a period of time.
- **Patient Contact List** - This report shows a list of patients and their contact information.
- **Itemization of Charges** - This report shows a summary of charges over a period of time.