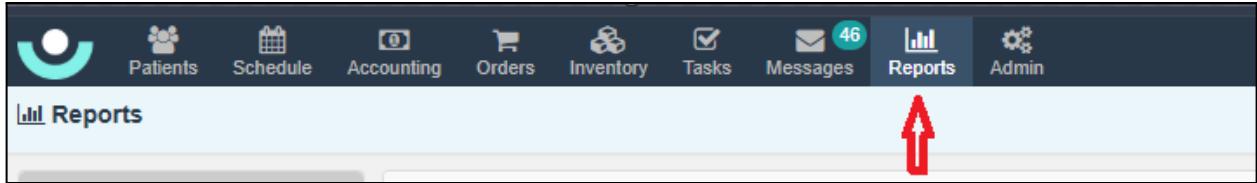
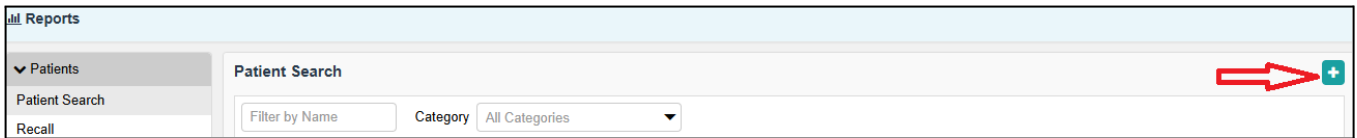


# SOP For Exporting Patient Data for Bulk Insurance Verification from RevolutionEHR

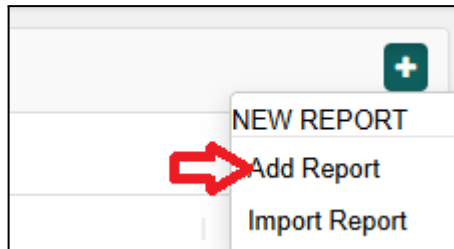
1. Go to Reports



2. Add a new report



3. Click on Add Report



**NEXT STEP ON NEXT PAGE**

4. Make a replica of this exact report

**For Patient Primary Location:** You would choose your own locations

**For Last Exam Date:** Choose a date range you would like to run the report for

**For Insurance Name:** Type in the insurance name for which you want to run bulk insurance verification for.

The screenshot shows a query builder interface with the following sections:

- Query Details:**
  - Name: Patient Data Export
  - Access Roles: Remote Staff Advanced +14 more..
  - Description: Export for Bulk Insurance Verification
  - Category: Patient Information
- Available Fields:** A list of categories including Patient, Key Dates, Account, Alerts, Communication, Referred By, Category, Race, Ethnicity, Insurance, Diagnoses, Medications, Eyeglass Rx, and Contact Rx.
- Search Criteria:**

Field	Operator	Comparison Value(s)
Patient Primary Location	Equals	Hurst Eyes Now
Last Exam Date	Between	01/01/2021 to 10/31/2024
Next Appointment Date	Empty	
Patient Active	Equals	Active
Insurance Name	Contains	VSP
- Result Fields:**

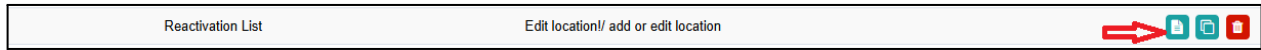
Field
Patient Last Name
Patient First Name
Patient DOB
Last Exam Date
Patient Preferred Phone
Patient Home Phone
Insurance Name
Patient Cell Phone
Patient Work Phone
Patient Email
Patient Primary Location Name
Insurance Name
- Sort Fields:**

Field	Sort
Patient DOB	ASC DESC

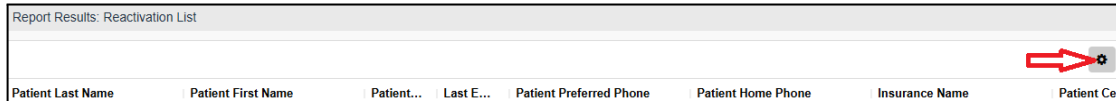
At the bottom, there are buttons for **Save** and **Cancel**.

And at the bottom click **Save**

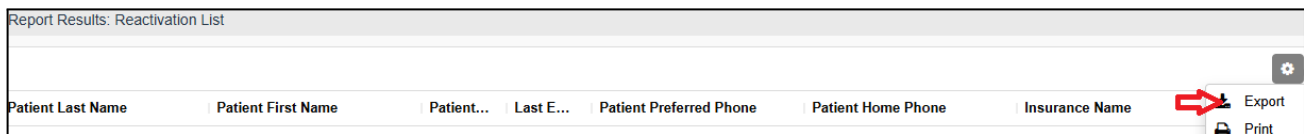
5. Once we have saved the report, find the report that we just saved, and run it.



6. At the bottom, look for report results and click on settings



7. And click on export



This would download a .CSV file. Save that file and send it to us.

## USABILITY

Once we have saved the report, run the report for each location and for each insurance name combination and download each file and send it to [support@eye2automation.com](mailto:support@eye2automation.com) with your office name.