

Credit Cards Report

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Overview of the Credit Cards Reports

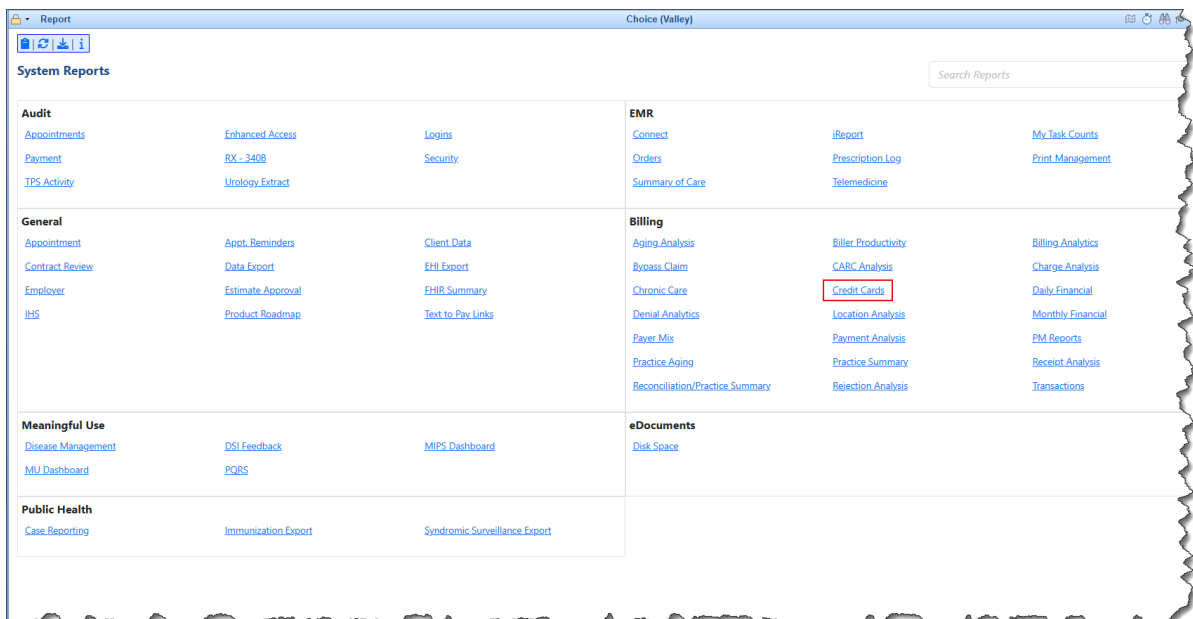
The Credit Cards report located under Reports > Billing > "Credit Cards," enables users to identify patients with recently expired credit cards and potentially contact them for updated card information. Practice administrators can also use this feature to monitor the number of stored cards, ensuring employees actively collect them from patients.

Credit Cards Report

1. Navigate to the **Reports** portal in the lower left hand corner.



2. From the **System Reports** window, select **Credit Cards** under Billing.



3. Select your **Advanced Search** filters and click **Search**.

Report

Credit Cards x

Advanced Search

×

by Chart

▼ Commonly Used

Chart

First Name

Last Name

Card Type

Status

☒ N/A
☐ Active
☐ Inactive

Last 4

Expiration Date

Date Added

Date Inactivated

Status

4. This report will provide the following columns:

1. Chart #
2. Patient Name
3. Card Type
4. CC Status
5. CC Last 4 #s
6. Exp Date
7. Date Added
8. Date Inactivated