Creating a Report for Upcoming Appointments

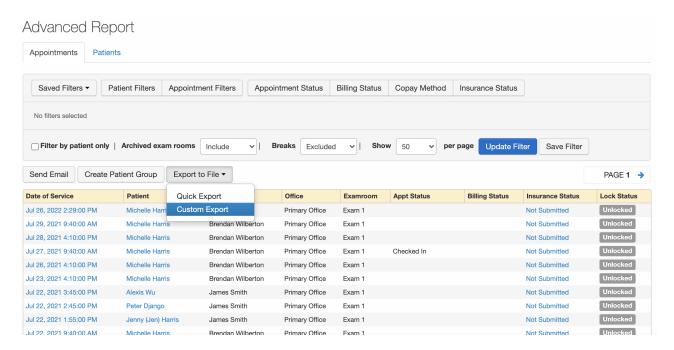
07/08/2024 7:27 pm ED

You can generate a report to see which patients have appointments scheduled and which ones do not use the **Advanced Reports** feature.

1. Go to Reports > Advanced Reports.



2. Under the Export to File drop-down menu, select Custom Export.



3. Select the **Date of Next Appointment** filter along with other filters to identify the patient and provider. You can name the report. Select **Export** when finished.

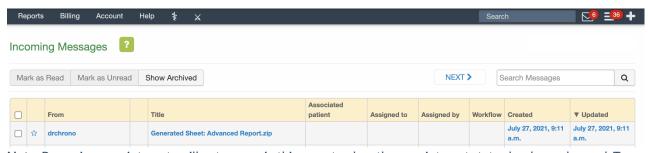
Custom Export × Report Name Advanced Report Patient (4) Appointment Clinical Note Doctor **Uncheck All** Check All ☐ Full Name ☐ Emerg Contact Relation ☐ Date of First Appointment First Name ☐ Referring Doctor ☐ Date of Last Appointment Last Name ☐ Ref Dr. Email ☑ Date of Next Appointment ☐ Chart ID ☐ Ref Dr. Phone ☐ Primary Ins Payer ☐ Date of Birth ☐ Ref Dr. Fax ☐ Primary Ins Payer ID ☐ Ref Source Primary Provider ☐ Primary Member ID ☐ Home Phone ☐ Employer ☐ Primary Ins Plan Name ☐ Cell Phone ☐ Employer Zip Code ☐ Primary Ins Group # ☐ Office Phone ☐ Employer Address ☐ Secondary Ins Payer □ Email ☐ Employer City O Cocondon, Inc Dover ID

4. The report will be in your message center (



Close

). From there you can view and download the report.



Export

Note: Recurring appointments will not appear in this report unless the appointment status has been changed. To view, these appointments go to **Schedule** > **Recurring Events**.