

# Running a report by Follow-up Date

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1. To run a report listing patients and their Follow-up Date (if populated - Patient Chart > Important tab)

Default Appointment Profile

→ Follow-up Date  Patient will get reminders around this date to make an appointment.

Follow-up Reason  e.g. 2 week follow-up

Last Appointment

[Save Demographics](#)

2. Navigate to Patients > Patient List > More Filters

3. Select the checkbox > Patients with follow-up appointment dates set > Search

Manage your existing patients ?

[Search](#) [Hide Filters](#)

Possible duplicate patients

Patients with follow-up appointment dates set

Patients with incomplete billing information

Patients who unsubscribed email

Inactive patients include

Inactive patients only

Patients who have OnPatient access

[+ Add new patient](#) [Update patient \(via C-CDA XML\)](#) PAGE 1 OF 1

Chart ID	Provider	Last Name	First Name	Home Phone	Cell Phone	Last Appt	Next Appt	Follow-up	Valid Ins
DOJA000002	James Smith	Dough	Jane		301-555-5555	Fri, 07/27/2018		Fri, 08/31/2018	▲
DOJO000001	James Smith	Doe	John		2405555555	Mon, 07/16/2018		Tue, 07/31/2018	▲
DOJO000002	James Smith	Doe	Joe		(801) 555-8888	Tue, 07/03/2018		Tue, 07/31/2018	▲
DOJO000003	James Smith	Doe 2	John	(443) 555-5555	(623) 555-5555	Mon, 12/09/2019		Fri, 01/31/2020	✓
HQSA000001	James Smith	HQ	Sample		410-555-5555	Wed, 09/04/2019		Mon, 09/30/2019	▲
HQTE000001	James Smith	HQ	Test		(240) 555-5555	Fri, 08/02/2019		Sat, 08/31/2019	▲
JUFR000001	James Smith	Junior	Frank		2405555555	Fri, 06/15/2018		Tue, 07/31/2018	▲

4. Once the information populates, select **Export (CSV)**.

[Bulk Import](#) [QRDA I Import](#) [Export \(CSV\)](#) [Export \(C-CDA XML\)](#)

The report will be generated and can be found in your message center.