Running a report by Patient Follow-up Date

Last modified on 04/11/2025 10:56 am EDT

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

Default Appointment Profile	······ V
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 Dem	ographics

- 2. Navigate to Patients > Patient List > More Filters
- 3. Select the checkbox > Patients with follow-up appointment dates set > Search

Schedule Clini	cal Patients Repo	ts Billing	Account	Marketplace	Help	**	×						Search		29 =9 +
Manage your existing patients ? Bulk Import QRDA I Import Export (CSV) Export (C-4														Export (C-C	DA XML) 💌
Patient search	Sear	ch													Hide Filters
Possible duplicate patients Patients with follow-up appointment dates set Patients with incomplete billing information Patients Patients with incomplete billing information Patients Patients with incomplete billing information Patients														PAGE 1 OF 1	
Chart ID	Provider	Last Name	¢	First Name	≎ Ho	me Phone	,	Cell Phone	¢	Last Appt	¢	Next App	t Follow-up		Valid Ins
DOJA000002	James Smith	Dough		Jane				301-555-5555		Fri, 07/27/2018			Fri, 08/31/2	018	A
DOJ0000001	James Smith	Doe		John				2405555555		Mon, 07/16/201	з		Tue, 07/31/	2018	A
DOJ000002	James Smith	Doe		Joe				(301) 555-8888		Tue, 07/03/2018			Tue, 07/31/	2018	A
DOJ0000003	James Smith	Doe 2		John	(44	3) 555-555	i5	(623) 555-5555		Mon, 12/09/2019	9		Fri, 01/31/2	2020	~
HQSA000001	James Smith	HQ	8	Sample				410-555-5555		Wed, 09/04/2019	9		Mon, 09/30	/2019	A
HQTE000001	James Smith	HQ	1	Test				(240) 555-5555		Fri, 08/02/2019			Sat, 08/31/	2019	A
JUFR000001	James Smith	Junior	F	Frank				2405555555		Fri, 06/15/2018			Tue, 07/31/	2018	A

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



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