

Running a report by Patient Follow-up Date

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The **Patient Follow-Up Report** is a valuable tool designed to help practices monitor and manage outstanding patient balances and pending actions. This report consolidates key patient account information, enabling staff to prioritize follow-ups and improve collections.

By running this report regularly, your office can enhance efficiency, reduce outstanding balances, and strengthen overall patient account management.

Video Walkthrough

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**

ScheduleClinicalPatientsReportsBillingAccountMarketplaceHelpX

Search

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Manage your existing patients ?

Bulk ImportQRDA I ImportExport (CSV)Export (C-CDA XML)

Patient search... 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)

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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		(301) 555-8888	Tue, 07/03/2018		Tue, 07/31/2018	▲
DOJO000003	James Smith	Doe 2	John	(443) 555-5555	(823) 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 on your device.

Video Walkthrough
