


Running a report by "Follow-up Date"

09/09/2024 3:59 pm EDT

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.

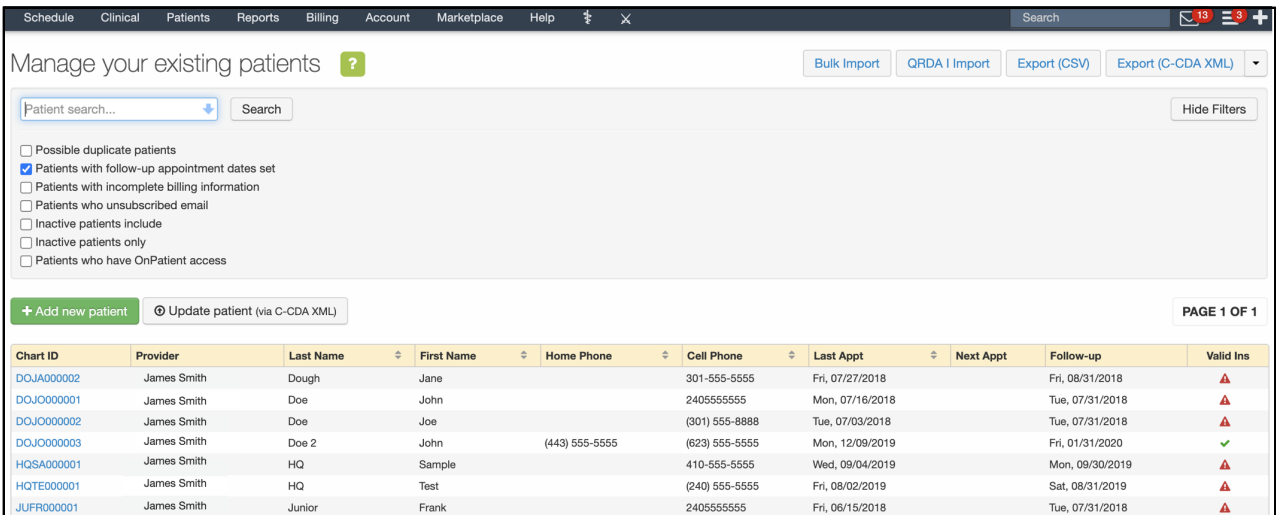
Follow-up Reason e.g. 2 week follow-up

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

Patient search...

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](#) 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		(301) 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	▲
HOTE000001	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, click 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.

Schedule Clinical Patients Reports Billing Account Help

Search

Jul 2020

+ Event Today Refresh Print Appts

Jul 19 2020 - Jul 25

Daily Exam Rooms Doctor Monthly

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

9:00am

9:00-10:00 am BW
Jenny (Jen) Harris: Primary

9:00-9:30 am BW
Jenny (Jen) Harris: Primary

9:00-9:45 am BW
Amanda Jones: Primary

9:00-10:15 am BW
Evan James: Primary Office