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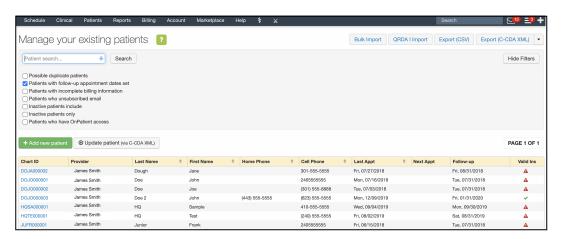
By running this report regularly, your office can enhance efficiency, reduce outstanding balances, and strengthen overall patient account management.
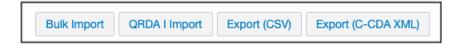
Video Walkthrough

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

2. Navigate to **Patients** > **Patient List** > **More Filters**

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

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

The report will be generated and can be found on your device.

Video Walkthrough