How to Obtain a List of Patients Who Have not Had an Appointment Recently
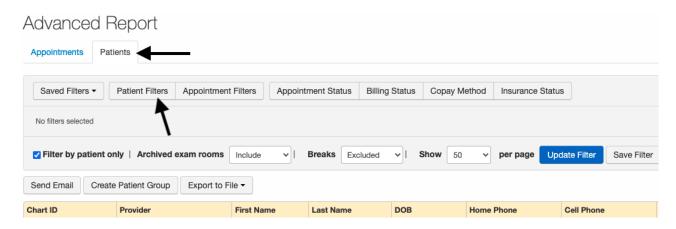
07/08/2024 7:36 pm EDT

You can easily use the advanced report that shows a list of patients who have not had appointments recently. This is a great way to pick out who to reach out to for follow-up visits.

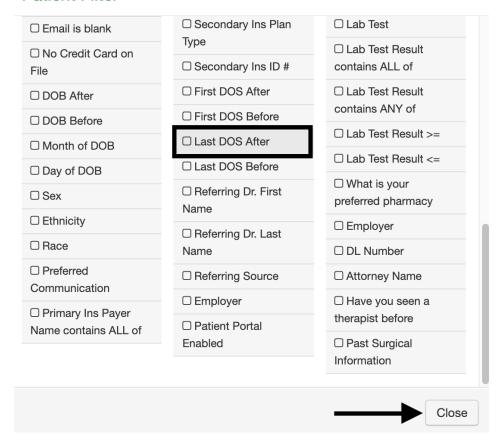1. Hover your cursor over the **Reports** tab and click on **Advanced Report**.

2. Click the **Patients** tab and select **Patient Filters.**

3. On this screen, please click on **Last DOS After** and click **Close**.

Patient Filter   ✕

☐ Email is blank

☐ No Credit Card on File

☐ DOB After

☐ DOB Before

☐ Month of DOB

☐ Day of DOB

☐ Sex

☐ Ethnicity

☐ Race

☐ Preferred Communication

☐ Primary Ins Payer Name contains ALL of

☐ Secondary Ins Plan Type

☐ Secondary Ins ID #

☐ First DOS After

☐ First DOS Before

☐ Last DOS After

☐ Last DOS Before

☐ Referring Dr. First Name

☐ Referring Dr. Last Name

☐ Referring Source

☐ Employer

☐ Patient Portal Enabled

☐ Lab Test

☐ Lab Test Result contains ALL of

☐ Lab Test Result contains ANY of

☐ Lab Test Result >=

☐ Lab Test Result <=

☐ What is your preferred pharmacy

☐ Employer

☐ DL Number

☐ Attorney Name

☐ Have you seen a therapist before

☐ Past Surgical Information

→   Close

4. Enter the desired last date of service and select **Update Filter**.

Advanced Report

Appointments | Patients

| Saved Filters ▾ | Patient Filters | Appointment Filters | Appointment Status | Billing Status | Copay Method | Insurance Status |

Last DOS After   ✕
10/01/2021

☐ Filter by patient only | Archived exam rooms [Include ▾] | **Breaks** [Excluded ▾] | **Show** [50 ▾] **per page**   [Update Filter] [Save Filter]