


# Running a report by "Follow-up Date"

07/24/2024 8:15 pm EDT

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](#)

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

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

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 \(via C-CDA XML\)](#) 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	▲
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	▲

- 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.

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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  Sun 7/19  Mon 7/20  Tue 7/21  Wed 7/22  Thu 7/23  Fri 7/24  Sat 7/25

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