

# Creating a Report for Upcoming Appointments

07/24/2024 1:30 pm EDT

You can generate a report to see which patients have appointments scheduled and which ones do not use the **Advanced Reports** feature.

1. Go to **Reports > Advanced Reports**.

**Reports** | Billing | Account

**PRACTICE REPORTS**

- Account / User Report
- Productivity Report
- Reminder Report
- Outgoing Prescriptions
- Patient Insurance Authorization
- Appointment Report
- Telehealth Report
- Patient Report
- Communication Log Report
- Medication Report
- Problem Report
- Allergy Report
- Labs Report

**Advanced Report**

2. Under the **Export to File** drop-down menu, select **Custom Export**.

### Advanced Report

Appointments | Patients

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

No filters selected

Filter by patient only | Archived exam rooms | Include | Breaks | Excluded | Show 50 per page | Update Filter | Save Filter

Send Email | Create Patient Group | Export to File | PAGE 1

Date of Service	Patient	Office	Examroom	Appt Status	Billing Status	Insurance Status	Lock Status
Jul 26, 2022 2:29:00 PM	Michelle Harris	Primary Office	Exam 1			Not Submitted	Unlocked
Jul 29, 2021 9:40:00 AM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 28, 2021 4:10:00 PM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 27, 2021 9:40:00 AM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1	Checked In	Not Submitted	Unlocked
Jul 26, 2021 4:10:00 PM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 23, 2021 4:10:00 PM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 22, 2021 3:45:00 PM	Alexis Wu	James Smith	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 22, 2021 2:45:00 PM	Peter Django	James Smith	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 22, 2021 1:55:00 PM	Jenny (Jen) Harris	James Smith	Primary Office	Exam 1		Not Submitted	Unlocked
Jul 22, 2021 9:40:00 AM	Michelle Harris	Brendan Wilberton	Primary Office	Exam 1		Not Submitted	Unlocked

3. Select the **Date of Next Appointment** filter along with other filters to identify the patient and provider. You can name the report. Select **Export** when finished.


## Custom Export x






Report Name

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Patient (4) Appointment Clinical Note Doctor


<input type="checkbox"/> Full Name	<input type="checkbox"/> Date of First Appointment	<input type="checkbox"/> Emerg Contact Relation
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Date of Last Appointment	<input type="checkbox"/> Referring Doctor
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Date of Next Appointment	<input type="checkbox"/> Ref Dr. Email
<input type="checkbox"/> Chart ID	<input type="checkbox"/> Primary Ins Payer	<input type="checkbox"/> Ref Dr. Phone
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Primary Ins Payer ID	<input type="checkbox"/> Ref Dr. Fax
<input checked="" type="checkbox"/> Primary Provider	<input type="checkbox"/> Primary Member ID	<input type="checkbox"/> Ref Source
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Primary Ins Plan Name	<input type="checkbox"/> Employer
<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Primary Ins Group #	<input type="checkbox"/> Employer Zip Code
<input type="checkbox"/> Office Phone	<input type="checkbox"/> Secondary Ins Payer	<input type="checkbox"/> Employer Address
<input type="checkbox"/> Email	<input type="checkbox"/> Secondary Ins Payer ID	<input type="checkbox"/> Employer City

4. The report will be in your message center (  ). From there you can view and download the report.

Reports Billing Account Help   Search  6  36 

Incoming Messages ?



<input type="checkbox"/>	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	 drchrono	Generated Sheet: Advanced Report.zip					July 27, 2021, 9:11 a.m.	July 27, 2021, 9:11 a.m.

**Note:** Recurring appointments will not appear in this report unless the appointment status has been changed. To view, these appointments go to **Schedule > Recurring Events**.