

How to Obtain a List of Patients Who Have not Had an Appointment Recently

07/24/2024 4:50 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**.



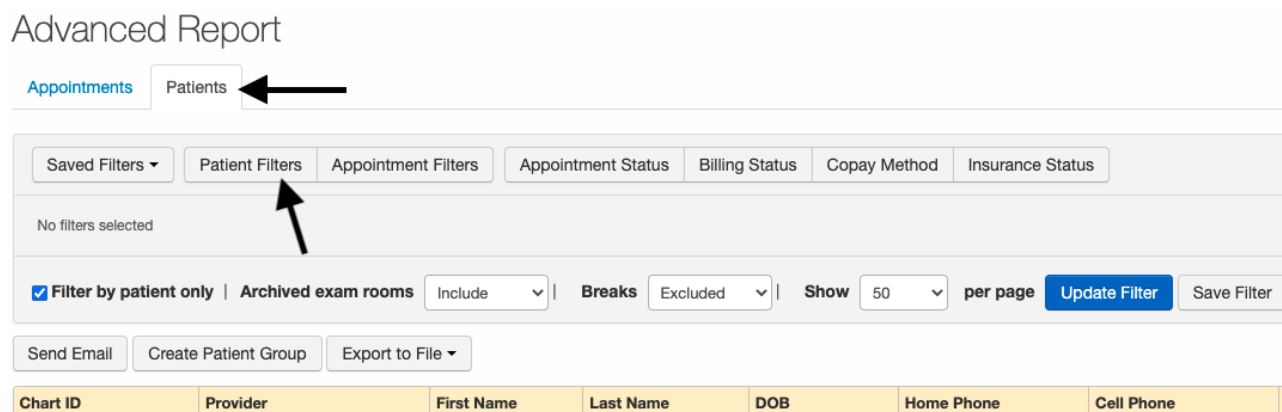
The screenshot shows a navigation menu with three tabs: 'Reports', 'Billing', and 'Account'. The 'Reports' tab is active and highlighted in yellow. Below it, a list of report categories is shown under the heading 'PRACTICE REPORTS'. The 'Advanced Report' option at the bottom of this list is highlighted with a blue background.

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



The screenshot shows the 'Advanced Report' interface. At the top, there are two tabs: 'Appointments' and 'Patients'. The 'Patients' tab is selected and highlighted with a blue background, indicated by a black arrow. Below the tabs, there is a filter selection area with several buttons: 'Saved Filters', 'Patient Filters', 'Appointment Filters', 'Appointment Status', 'Billing Status', 'Copay Method', and 'Insurance Status'. The 'Patient Filters' button is highlighted with a blue background and has a black arrow pointing to it. Below this area, there is a section for filter settings, including a checkbox for 'Filter by patient only' (checked), 'Archived exam rooms' (Include), 'Breaks' (Excluded), 'Show' (50 per page), and buttons for 'Update Filter' and 'Save Filter'. At the bottom, there are buttons for 'Send Email', 'Create Patient Group', and 'Export to File'. Below these buttons is a table header with columns: 'Chart ID', 'Provider', 'First Name', 'Last Name', 'DOB', 'Home Phone', and 'Cell Phone'.

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

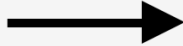
Chart ID	Provider	First Name	Last Name	DOB	Home Phone	Cell Phone
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3. On this screen, please click on **Last DOS After** and click **Close**.

Patient Filter



<input type="checkbox"/> Email is blank	<input type="checkbox"/> Secondary Ins Plan Type	<input type="checkbox"/> Lab Test
<input type="checkbox"/> No Credit Card on File	<input type="checkbox"/> Secondary Ins ID #	<input type="checkbox"/> Lab Test Result contains ALL of
<input type="checkbox"/> DOB After	<input type="checkbox"/> First DOS After	<input type="checkbox"/> Lab Test Result contains ANY of
<input type="checkbox"/> DOB Before	<input type="checkbox"/> First DOS Before	<input type="checkbox"/> Lab Test Result >=
<input type="checkbox"/> Month of DOB	<input type="checkbox"/> Last DOS After	<input type="checkbox"/> Lab Test Result <=
<input type="checkbox"/> Day of DOB	<input type="checkbox"/> Last DOS Before	<input type="checkbox"/> What is your preferred pharmacy
<input type="checkbox"/> Sex	<input type="checkbox"/> Referring Dr. First Name	<input type="checkbox"/> Employer
<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Referring Dr. Last Name	<input type="checkbox"/> DL Number
<input type="checkbox"/> Race	<input type="checkbox"/> Referring Source	<input type="checkbox"/> Attorney Name
<input type="checkbox"/> Preferred Communication	<input type="checkbox"/> Employer	<input type="checkbox"/> Have you seen a therapist before
<input type="checkbox"/> Primary Ins Payer Name contains ALL of	<input type="checkbox"/> Patient Portal Enabled	<input type="checkbox"/> Past Surgical Information



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 ✕

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