

USING EXACT TO EXPORT A PATIENT LIST

- 1) At the top of the screen, select Contact Lists.
- 2) Click 'Create list'.
- 3) Next to 'Select patients' – click the query template (a box with 3 lines on the right).
- 4) At the bottom of the screen, click the add new query template button (button with a '+1').
- 5) At the bottom right click the 'Insert patient selection into the list' button (the button with lines and an arrow pointing down then left).
- 6) In the 'Select Condition' window, scroll down and click 'Last Visit'
- 7) In the 'Edit Patient Selection' window, set the last visit date parameters you wish to include (or leave blank if you need to export the entire patient list).
- 8) Click 'OK', then click 'OK' again.
- 9) Your newly produced query template will now appear in the list.
- 10) Double click your newly produced query template in the list.
- 11) This will bring up a new window. Untick 'Use to book appointments' then click 'OK'
- 12) A 'Create Contact List' message will appear showing you the number of patients that will be included in the list based on your selection query and you will be asked if you want to create the list. Click 'Yes'
- 13) A progress bar will appear with a message 'Creating Contact List'.
- 14) When this progress bar disappears, you will see a list of patient names on the screen.
- 15) In the bottom left hand corner, click 'Export List'
- 16) Save you list to the Desktop of your PC. Give your list a filename (the default is 'conlist') and ensure the 'Save as type' is displaying 'Document (.doc; .wri; .txt; .csv)'. Click 'Save'
- 17) A message will appear saying 'Creating Contact List File'. This can sometimes take quite a while to complete, depending on the number of patient records being exported, so please be patient and do not click 'Cancel'.
- 18) When the 'Creating Contact List File' message disappears, the export is complete and the file is now on your desktop.