

# Using R4 to export a patient list

The first thing to do is create & save a query based on the last visit date parameters. Then create a report that accesses the data from this query and enables us to select the fields required for exporting.

**Create a query for patients whose last completed appointment was between your chosen dates**

1. Select search for a patient
2. Select query wizard then click 'new query'
3. Select 'start'
4. Select 'next'
5. Select 'specify attributes'
6. Scroll down the Fields section on the left side, and select - " Last completed appointment " and select add.
7. Again, scroll down the Fields section on the left side, and select - " Last completed appointment " and select add.

**THIS MEANS YOU HAVE ADDED THE 'Last completed appointment' field twice.** Now let's set some date parameters:

8. In the top 'Last completed appointment' field selected above, click the drop down under the 'Value' heading and select 'Later than' and set your first date parameter (e.g Later than 01/01/2015). This will be the date furthest back in time you wish to set.
9. In the lower 'Last completed appointment' field selected above, click the drop down under the 'Value' heading and select 'earlier than' and set your second date parameter (e.g Earlier than 01/06/2018). This will be the most recent date you wish to set
10. You've now set the query to select patients whose last visit was **later** than the first date you set but **earlier** than the second date you set.
11. In the section marked - 1 Absolute, select OK, and finish and 'save as new' with the name you wish to use (e.g WOMM Reactivation list Feb 2019).
12. Then back in the 'select patient' screen, select your query and then select run. This will tell you how many patients have been selected based on the date parameters you set.
13. Go to 'Reports' (this might be in Springboard)
14. Select 'New Report'.
15. Add in the fields you want to export. The following fields should be selected:

- Title
- Forename
- Surname
- Last completed appointment
- Date of birth
- Mobile number
- Home telephone number
- User (ie dentist name)
- Gender
- Patient type
- Address 1
- Postcode

16. At the bottom make sure the output is set to 'Excel' **NOT** 'html'
17. Click save report and give it a name (e.g WOMM Reactivation list Feb 2019).
18. Go to reports list
19. Double click the report you created
20. Make sure it's output in Excel