

To find and export recall out of Maximeyes:

(If you are not able to save to the server from a workstation in Excel, you may want to do this on the server every time)

1. From Patient Records, hit the Recall button, choose which recall (exam, other, etc), fill in appropriate information (dates and doc), Proceed – list, Close, View List, Sort by Last Name & First Name, Close (RIGHT NOW TAKE OUT ANY THAT NEED TO BE OMITTED FROM THE LIST, IF YOU KNOW OF ANY)
2. On patient records screen,(with found set of patients), File, Import/Export, Export, Export Records to File (choose the drive, folder, file, etc where you want to save this list you're getting ready to make. Mine are in a folder called Recalls) Save as type: Comma Separated Text.CSV. Name the file and save it.
3. Specify Field Order for Export:
In *Current File*("Records") highlight **First Name** then click Move, highlight **Middle Initial** then click move, **Last Name, Address, City, State, Zip** (move each one of these over)

Do this next step only if you have pre-appointed ones that you need to pull the appointment information also.

In *Rec to Appt by Pt Id* choose **Appt Date, Appt Day, Appt Time, Scheduled Resource** (move each one of these over)

4. Click on Summarize by, then put a check mark by last name and first name.
5. Export

It's now saved as a file that you can put as an attachment to e-mail.