

# Appointment Report

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The Appointment Report lists all appointments for the day for all branches, or a selected branch, and can be printed or saved to email to staff. The report includes what SMS reminders were sent and what appointments were cancelled or missed.

## Video guide

**Our 3.5-minute quickstart video explains how the report works and how it can be used!**

## Running the report

To open the Appointment Report:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily Reports > Appointments**.

The **Appointment Report** screen will open.

3. Select the **Style** of report you want:
  - **Appointments Only** - prints all appointments (one page per doctor) for the selected date range and start/ finish times.
  - **Appointments and Available Slots** - prints empty and booked slots. We recommend setting the **Time From/To** criteria. It will normally begin at the **Surgery Opening Time** as defined in the **Branch Options**.
  - **Appointment Counts** (Zedmed v37 and later) - report on the number of appointments per practitioner.
  - **Cancelled/Missed** - prints a list of cancelled (not deleted) or Missed (patient not Attended in the Waiting Room) appointments.
4. Select the report's **Criteria**.

You can focus on a specific **Branch** or **Treating Doctor**, and set the date and time range that you want the include.

5. Select **Print** to print out the report or **Screen** open it. The **Screen** view has print and save menu options.

**Export** will export the data to a CSV file.

**Appointment Listing**

**Mr Phillip Davis      Monday      26 Aug 2024      From 06:00 To 22:00      Test Branch 1**

Time	Type	Dur	File#	PF	FP Name	DOB	Home Phone	Work Phone	Mobile	SMS
9:30	C7	10	60	Y	Benstead, Olivia	17/06/2009				
10:00	C7	10	48	Y	Barks, Mr Jayne	15/04/1969				
10:30	C30	20	128	Y	Bowell, Mr JIM	22/12/1977				
11:15	C7	10	46	Y	Clapp, Jeremiah	21/05/1978				
12:00		15	28	Y	Allison, Clayton	27/06/1972				

Number of Appointments : 5

**Appointment Report**

**Style**

Appointments Only     Order by Name

Appointments and Available Slots

Appointment Counts

Cancelled/Missed

Cancelled Only

Missed Only

Send Appointments via SMS    Modify SMS Text

**Criteria**

Date from:  To:

Time from:  To:

Branch:

Doctor:

Resource:

Appointment Type:

**Report**    Mail Merge

**Display Options**

Addresses     Include History

Referral Details

Separator Lines

Preferred Name

Branch
User

## Appointment Counts report

In Zedmed v37 and later, you can produce reports with the number of appointments per practitioner with the total number of appointments for the selected time range. This report does not capture cancelled, unavailable and non-patient appointments.

Select **Appointment Counts** as the **Style** option, select the date range and run the report to view or print the results.

**Appointment Counts****Monday 26 Aug 2024 From 06:00 To 22:00 10 Appointment(s)**

Treating Doctor/Resource	Number of Appointments
Dr Grenville Howell	3
Mr Phillip Davis	5
Dr WARREN HEDRICK	2
<b>Total Appointments</b>	<b>10</b>

## Send SMS reminders

Zedmed will automatically send appointment notifications and reminders as explained in the [Appointment Notifications](#) guide.

You can use the Appointments Report to manually send a reminder as explained in the [Appointment Reminders](#) guide.

The **Appointment Report** can also be used to modify the text used in the messages. The modifications are made using the **Report** and **Mail Merge** tabs and the **Send Appointments via SMS** option.

### 2-way functionality

The Send SMS feature supports 2-way functionality, and can be used to manually send appointment reminders that patients must reply to with Y/Yes or N/No (not case sensitive). To learn more, see [2-way SMS replies](#).