

Patients Report

Last Modified on 06/10/2023 2:39 pm AEDT

The Patient Service Report lists information from the **Patient Details** screen according to the criteria you select.

You can also review the list of **financial reports**.

Running the report

The report uses the **Patient Reports** screen to select what's to be included and how it's to be presented.

To open the Patient Report:

1. Go to Zedmed's **Management** tab.
2. Select **Reports > Patients**.

The **Patient Reports** screen will open.

3. Select or update the required **Style**, **Group by** and **Criteria** fields.

This screen contains a large range of selectable options that you can explore for the exact information you want.

To get the most out of these options, use case scenarios are presented in the **Using the report** section below.

4. Select **Print** to print the report or **Screen** to open it. The **Screen** view has print and save options in the menu above the report.

Patient Report

Criteria		Group By	Order By
Branch	All	None	Family Name
Usual Doctor	All		
Referral Doctor	All		
Patient	All		
Type	All		
Gender	All		
Status	All		
User Field	All <>		
Postcode Range	All		
M/C Expiry Date	All		
First In Date	All	Style Single Line Details	
Last In Date	All		
Age/DOB Range	All		
Age/DOB Range	All		

File #	Surname	Name	Address	H Ptn	DOB	Age	Ge	Brn	Doc	Sta	MC Exp	Last In
45	Alexander	Brian	484 Gerhardt Cct		03/09/194	72	M	MED		CUR		15/07/202
45	Alexander	Brian	484 Gerhardt Cct		03/09/194	72	M	BR3		CUR		15/07/202
28	Allison	C Layton	7 Kendall Ave HUNTERS		27/06/197	49	M	MED		CUR		08/07/202
29	Allison1	Anna	7 Kendall Ave HUNTERS		21/10/201	6	F	MED		CUR		09/07/202
30	Andrews	CorNeilus	5 Crystal Ave HUNTERS		21/05/197	46	M	MED		CUR		07/06/202
31	Andrews	John	5 Crystal Ave HUNTERS		21/08/201	4	M	MED		CUR		18/06/202
8	BLAIR	Miss	11 Joachim Cct PENNANT	03 125	21/11/199	21	F	MED FD		CUR		25/06/202

Patient Reports

Style <input checked="" type="radio"/> Single Line Details <input type="radio"/> Extended Details <input type="checkbox"/> Double Spacing <input type="radio"/> Held Accounts <input type="radio"/> Mailing Labels <input type="radio"/> Bar <input type="radio"/> Line <input type="radio"/> Pie <input type="radio"/> CSV file <input type="radio"/> Mail merge using:	Criteria Branch: <input type="text" value="Branch 1"/> Usual Clinics <input type="checkbox"/> Usual Doctor: <input type="text" value="All"/> Referral Doctor: <input type="text" value="All"/> <input type="button" value="Doctor"/> Patient: <input type="text" value="All"/> <input type="button" value="Patient"/> From Surname: <input type="text"/> To Surname: <input type="text"/> Type: <input type="text" value="All"/> Gender: <input type="text" value="All"/> Status: <input type="text" value="All"/> Family Head: <input type="checkbox"/> Have Email Address: <input type="checkbox"/> ATSI: <ul style="list-style-type: none"> <input type="checkbox"/> Aboriginal but not Torres Strait Islander origin <input type="checkbox"/> Torres Strait Islander but not Aboriginal origin <input type="checkbox"/> Both Aboriginal and Torres Strait Islander origin <input type="checkbox"/> Neither Aboriginal nor Torres Strait Islander origin <input type="checkbox"/> Declined to respond <input type="checkbox"/> Unable to Answer <input type="checkbox"/> Not Recorded User Field: <input type="text" value="All"/> Value: <input type="text"/> Postcode Range: <input type="text" value="0"/> To: <input type="text" value="0"/> <input type="checkbox"/> Enabled Medicare Expiry: <input type="text" value="03/08/2021"/> To: <input type="text" value="03/08/2021"/> <input type="checkbox"/> Enabled First In Date: <input type="text" value="03/08/2021"/> To: <input type="text" value="03/08/2021"/> <input type="checkbox"/> Enabled Last In Date: <input type="text" value="03/08/2021"/> To: <input type="text" value="03/08/2021"/> <input type="checkbox"/> Enabled Age Range: <input type="text" value="0"/> To: <input type="text" value="0"/> <input type="checkbox"/> Enabled DOB Range: <input type="text" value="03/08/2021"/> To: <input type="text" value="03/08/2021"/> <input type="checkbox"/> Enabled
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Group By:
 Order by:

Using the report

When you run the **Patient Report**, the **Patient Reports** screen is used to select the information to include in the report. This section explains what options to select for specific use cases.

Master Patient Listing

Use the style **Single Line Details** listing for all patients **Ordered by > Family Name** sequence. This helps look up file numbers if the computer system is unavailable. This could be run every 6-12 months.

Incremental New Patient Additions

Use the style **Single Line Details, Ordered by > Family Name for First In**. Set the start date to the last time that a **Master Patient Listing report** was run.

Practice Definable Fields on Further Details form

Search on the five practice-definable coded fields (left column) to extract patients with those qualities.

Patient Catchment Analysis

Use the **Pie chart, Grouped by > Postcode**, for **Postcode Range** set to your main catchment area (otherwise you will get hundreds of minor postcodes which will reduce the clarity of the pie chart).

Held Accounts

Use the **Held Accounts > Style** to list all private patients whose accounts have been placed on hold to stop the printing of account reminders.

Using the report for mailing

It is possible to use this report to print mailing labels and to gather information for letters and emails.

The Mail merge functions can be used to send letters or emails to patients using MS Word Templates. They can be set up and maintained through the **Management > WP_Setup > FRM Documents > Mail merge program**. All Mail merge templates used in this way must start with the stem **FRM Patients** to appear in the Mail merge documents window. If communications are sent as emails, the Word Mail merge document can either be the body of the email or an attachment to the email subject.

Mailing Labels and Mail merge/email

This report can print mailing labels (8x2 per sheet) and Mail merge (or email) a variety of letters for example, if you wanted to send a letter to patients over 65 to come in for a free flu shot.