

# Patient Service Report

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

The Patient Service Report contains all the criteria in the existing Patient Report but it can limit the list of patients to those who meet specific service criteria. The criteria include specific items billed and groups of items, as explained below.

You can also review the list of [financial reports](#).

## Patient Service Report video

Our 3-minute quickstart video explains how the report works and how it can be used!

## Running the report

To open the Patient Service Report:

1. Go to Zedmed's **Management** tab.
2. Select **Reports > Patient Service Report**.

The **Patient Service Report** screen will open.

3. Select the required **Patient Criteria**.
4. Select the required **Service Criteria**.

The service criteria will be limited to:

- Specific items billed in a specific date range (and not billed for this service since that date range), for example, patients that have been billed a 721 but not a 732.
  - Groups of items that have been classified with an **Analysis Group** (e.g. all massage items). This would require each item be configured with the appropriate Analysis Group.
5. Select the output option:
    - **Print** to print out the report.
    - **Screen** will open the report with print and save menu options.
    - **Save as CSV** will export the data to a CSV file.
    - **Send SMS directly** to send SMS messages to patients who are **set up for SMS**.
  6. Select **Close** when you have finished.

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### Patient Service Report

Criteria				Group By	
Branch	Branch 1	Last In Date	All	None	
Usual Doctor	All	Age Range	All	Order By	
Referral Doctor	All	Mobile Phone Holder	Yes	Family Name	
Patient	All			SMS Message	
Type	All				
Gender	All				
Postcode Range	All				
First In Date	All				

File #	Surname	Name	Address	Home Ph	Mobile	Age	Gn	Brn	Doc	Last In
8	BLAIR	BEVERLY	11 Joachim Cct PENNANT HILLS 2120	03 125 12541	0412012100	21	F	MED	PD	3/08/2021
7	BLAIR	KYM	11 Joachim Cct PENNANT HILLS 2120		0409 211 060	52	F	MED		3/08/2021
48	Banks	Jayne	774 Dinh Pl WEST RYDE 2114		0409 211 060	52	F	MED		21/06/2021

#### Patient Service Report

**Patient Criteria**

Branch:

Usual Doctor:

Referral Doctor:

Patient:

Type:  Gender:

From Surname:  To Surname:

Postcode Range:  To  Enabled

First In Date:  To  Enabled

Last In Date:  To  Enabled

Age Range:  To  Enabled

Mobile phone:  Have  Have not  All

**Service Criteria**

Patients have services of

Items (e.g. 1,23,110):

Analysis Group:

In the period of:  to

Patients do not have services of

Items (e.g. 1,23,110):

Analysis Group:

In the period of:  to

Group by:  Order by:

Enter SMS Message: (Maximum 160 characters)

## Send an SMS Message

The report contains a custom Enter SMS text box where you can create an SMS message to be sent to one patient or a number of patients. For example, you may want to message all patients over 65 that haven't had a flu shot to book an appointment to get one.

The SMS message will also appear in the report as a record of what was sent to the reported patients; however it is not stored in the database. The SMS message needs to be typed in (limited to 160 characters) every time you wish to send a message. If you go over the 160-character count, you will be charged for 2 SMS messages but it will still be sent as 1 message.

We advise clinics to print/preview a report first before sending the SMS to the patients. It is important the criteria of the report is not changed, otherwise, the patients who receive messages could be different. When the SMS messages have been sent, a dialog prompt will appear and display the number of messages that have been sent.

