

# Flexi reports

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Create your own demographics report based on a combination of criteria.

## Report overview

A Flexi Report is created using a wizard that helps you define the criteria and how that criteria is logically linked to the rest of the report. There are 8 criteria selection screens and a demographics filter that can be applied to the entire report to filter the results based on attributes like age, gender and patient status. Under most circumstances, you will only need to define one or two criteria to find the data you require.

The criteria are Current ICPC Code Selection, Current Problem Text Selection, Measurement Value Selection, Prescription Selection, Encounter RFE Code Selection, Encounter RFE Text Selection, Service Selection and Excluded Services Selection.

### The and/or selections

Each of the 8 criteria screens has an "or"/"and" selector with the options **Or the Following Criteria/And the Following Criteria**. These options are used to determine if a patient must meet the criteria on both selection screens (and) or one of the selection screens (or) to be included in the report.

## Create a report

To create a new Flexi report:

1. Go to Zedmed's **Reception** tab.
2. Select **Clinical Records**.
3. Select **Reports > Flexi Report**.

The **Flexi Report** screen will open.

4. Select **New**.

The **Flexi Report Design Wizard** will open.

5. Complete the **Report Name and Description** screen.

All reports must be uniquely named. The Report Description will appear on the Flexi Reports selection screen and in the header of the final report. It commonly summarises what the report is looking for and, in some instances, its purpose.

Clinical data - Report Name and Description (Screen 1 / 12)

Report Name  
Clinical data test

Report Description  
Test of Flexi Report

◀ Previous   Next ▶   Cancel   Finish

6. Complete the **Demographics Filter** screen.

This screen allows the report to include patients with a special status (i.e. Casual, Archived and/or Deceased) and to filter the report based on gender or age. By default, patients of all ages and genders are included in the final report.

This global filter overrides any other criteria specified on later screens regardless of what those criteria are.

Clinical data test - Demographics Filter (Screen 2 / 12)

Basic Patient Criteria

Combine With Previous Criteria  
 Or the Following Criteria    And the Following Criteria

Special Status   Include Casual    Include Archived    Include Deceased

Age Range   From    To

Gender   All ▼

Usual Doctor   Phillip Davis ▼

◀ Previous   Next ▶   Cancel   Finish

7. Complete the **Encounter Date Range Selection**.

This screen applies an encounter date range filter. This is a global override filter that's applied regardless of the content in the later screens.

## 8. Fill in the 8 criteria screens.

The screens are Current ICPC Code Selection, Current Problem Text Selection, Measurement Value Selection, Prescription Selection, Encounter RFE Code Selection, Encounter RFE Text Selection, Service Selection and Excluded Services Selection.

Each screen follows the same selection style format. The example below shows the Current ICPC Code Selection screen.

## How to use the 8 criteria selection screens

### Adding criteria

- Type a filter term into the **Text Filter** field.
- Select the items you wish to include.
- Select the arrow to move all selected items to the **List Items** section.

### Combine With Previous List Screen Criteria

Specifies how the criteria is to be logically linked with the selections on any previous screens. There are two options: 'And the following criteria' and 'Or the following criteria'. This radio group will be disabled if the previous selection screens are blank.

- If **Or** is used, a patient must meet either the criteria on the current or previous screen to be included in the report.
- If **And** is used, a patient must meet both criteria.

### List Inclusion Criteria

This section is used to define what patients meet the criteria on the current screen.

- Any of - The patient must match one or more of the list items to be included in the report.
- All of - The patient must match each of the List items to be included in the report.
- Not Any Of - If the patient matches one or more of the list items, the patient will be excluded from the report.
- Not All of - If the patient matches all of the list items, the patient will be excluded from the report.

### Advanced options

To use more advanced criteria selection options, see the [Flexi report advanced article](#).

9. Select **Next** on each criteria screen to advance to the **Report Structure - Advanced** screen.
10. Select **Finish**.

The report will save and can now be run from the **Flexi Report** screen.

## Run a report

To run a Flexi report:

1. Go to Zedmed's **Reception** tab.
2. Select **Clinical Records**.

The **Clinical Records** screen will open.

You do not need to open a patient or start an encounter to run a clinical module's report.

3. Select **Reports > Flexi Report**.
4. Select the report you want to run.
5. Select **Run**.

The **Report Format Selection** screen will open.

6. Select **Preview for Printing** or **CSV Report**.
  - a. Preview for Printing - generates and opens the report. Select **File > Save As** to save the report.
  - b. CSV Report - prompts you to select a download location and saves the CSV file.
7. Select **Close** when you have finished with the Flexi Reports screen.

