

Appointments 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**.
 - **Cancelled/Missed** - prints a list of appointments that were cancelled (not deleted) or Missed (patient not Attended in the Waiting Room).
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.

The screenshot shows the Zedmed software interface. The main window is titled 'Appointment Listing' and displays a list of appointments for Dr. Phillip Davis on Monday, 2 Aug 2021, from 06:00 to 22:00 at Branch 1. The list includes columns for Time, Type, Duration, File#, PF, FP, Name, DOB, Home Phone, Work Phone, Mobile, and SMS. There are four appointments listed.

An 'Appointment Report' dialog box is open in the foreground. It has two tabs: 'Report' and 'Mail Merge'. The 'Report' tab is active, showing 'Style' options (Appointments Only, Appointments and Available Slots, Cancelled/Missed) and 'Criteria' (Date from, To, Time from, To, Branch, Doctor, Resource, Appointment Type). The 'Mail Merge' tab is also visible, showing 'Display Options' (Addresses, Referral Details, Separator Lines, Preferred Name) and 'Include History'.

The 'Appointment Report' dialog box also includes buttons for 'Print', 'Screen', 'Export', and 'Close'.

SMS features

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.