

Patient Service Report

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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:

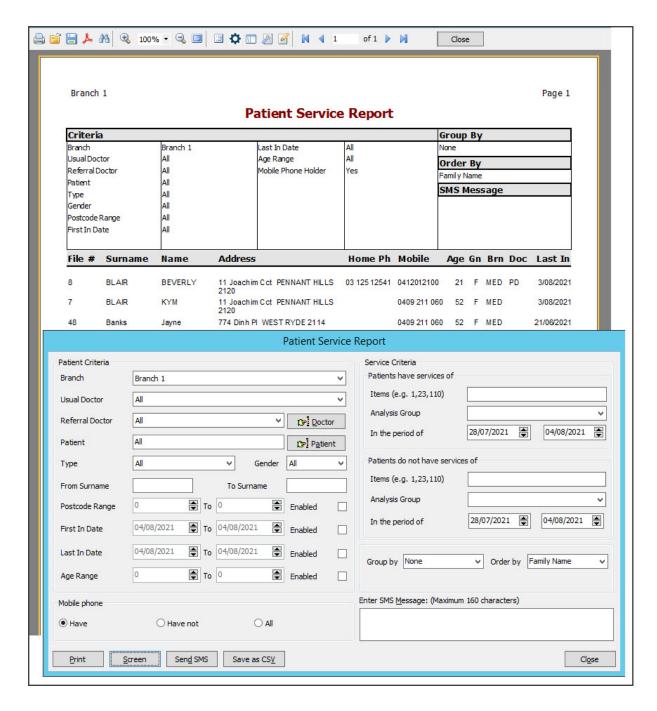
- 1. Go to Zedmed's **Management** tab.
- 2. Select Reports > Patient Service Report.

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.



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.

