

Finding the right report

Last Modified on 05/02/2025 10:08 am AEDT

Use this guide to find the right Zedmed report for the information you require.

I want to see:	The required report is:	The configurations are:
Doctor payments	Reception>Daily Reports> Transaction/GST report	Select the period and Transaction Type > Receipts . Can filter by Doctor .
	Reports tab > Credit Allocation Report	Select period then Banklist, Branch or Doctor .
Debtors outstanding invoices	Management>Debtors> Debtors Report	Select Payer type . Review the other filters such as Style and Dates .
Item codes billed E.g Patients who have reached the Medicare service limit.	Management>Reports> Patient Service Report	In one of the two sections, enter item numbers to display if a patient has or has not been billed.
Billing by fee type E.g Compare the clinic's % of private vs bulk billing.	Management>Reports> Statistics Report	Pie charts > Show Fees and Group by > Fee type . Can filter by Doctor .
Patients' email addresses	Management>Reports> Patients	Style = CSV file . Tick Have Email Address checkbox.
Unbilled attendances For all or treating Doctor.	Reception>Daily Reports> Attendances	Use the Filter drop-down to select attendances Not Billed .
Account reminder statements Statement of patients' outstanding invoices.	Management>Debtors>Account Reminders	Include a custom message for each Ageing Period (#1 #2 #3).
A doctor's day sheet Produces a list of appointments for the day.	Reception>Daily Reports> Appointments	Select the day's date and select the Doctor . Review other filters.
Canceled appointments & why	Reception>Daily Reports> Appointments	Under Style , select Cancelled/Missed radio button. Review other filters.
Unactioned results Initial and pending results	Clinical > Reports> Incomplete Results	Group or filter by Doctor . Select Status Not Completed .
Outstanding referrals	Clinical>Reports>Outstanding Referrals	Check the Status is set to Open - Results received '.

Doctor's Lab Referrals	Clinical>Reports>Referral Request Report	Select doctor under Criteria . Review the Date Range and Request Status .
Patient referrals by doctor	Management>Reports>Referral Doctor Statistics	Review the filters. E.g., how to Group the information and the date range.
High-risk medicine scripts	Clinical>Reports>Patients Drug Report	Current Drug Search Criteria , enter drug name (min 3 char). Screen .
Health Summary uploads	Clinical>Reports>Tracking Health Record Uploads.	Run for Event Summary , Shared Health Summary or both.
Patient recalls	Management>Reports>Recalls	Select the Maturity Date range with due care when varying the dates.
A list of new patients	Reception> Daily Reports>Appointment Reports	Select New Patient from the Appointment Type drop-down.