

Patient Criteria Report

Click on the Reports menu, then Lists, then Patient Criteria Report.

The Patient Criteria Report will search the database for specific patient information, and generate a list of patients that fall into the selected criteria. From there, a list can be printed, or labels, or export to excel like most normal reports.

This report is extremely useful for generating lists of patients the office hasn't seen recently, or has seen recently, and making mailing labels for them.

There are 2 pages of criteria for which to search. When searching for a **Diagnosis** on page1 and a **Recall Date** on page 2, it will only show patients that match both of the search limiters you set.

Page 1

The fields here on the report are used to run queries on your patient's details. For example: If you were looking for patients that had birthdays in October, you would click on the **BIRTH MONTH** field, and then use the drop down arrow to find **Oct**.

When you PRINT the report, it will show you a list of patients who have October birthdays:

| Patient Name | Patient No. | Address | City | St | Zip | DOB | SSN | Phone (H) | Dr Name |
|---------------|-------------|------------------|---------|----|-------|------------|-----------|----------------|---------------|
| BUNDY, PEG G. | 00000024 | 312 N LAKE SHORE | CHICAGO | IL | 45612 | 10/15/1964 | 333554444 | (312) 233-8989 | KOLE, JACK M. |
| | | | | | | | | | |
| | | | | | | | | | |

By clicking on the Print icon on the report, it will generate a preview of the actual report you have requested:

| Patient Name | PT Number | Address | Home Phone | DOB |
|---------------|-----------|---|----------------|------------|
| BUNDY, PEG G. | 00000024 | 312 N LAKE SHORE DRIVE CHICAGO, IL 45612 | (312) 233-8989 | 10/15/1964 |

If you generate a list of patients, and you do not want to print a report for all of the patients shown on the report, place a check mark in the box to the left of the patient's name which you **DO NOT** want to print. This will exclude them from the report.

Some other helpful information for the criteria report fields on the first page is:

Insurance 1 & 2: The insurance coverage a patient has currently. Insurance 1 specifies Primary coverage, Insurance 2 specifies secondary coverage.

Mail Code & Financial Class: This is taken directly from the Patient Detail screen.

You can now generate a report for your patients by **Procedure Code**.

Last Seen Date: This is the date the patient was last seen by their primary care physician, as defined by the user in the (#link Transactions Screen 2 Button)

Recall Date: This date is the last time a patient has come in. So if today was February 1st, and the office wanted a list of patients who have been treated in the last month, use the date range of 01/01/2008 - 02/01/2008. To find a list of patients who haven't been treated for a year or more, using the same February 1st reference, use the date range **01/01/1950** - 02/01/2007 (or any similar date way back in the past)

Patient Balance & Insurance Balance: Specify a balance necessary to generate their name on the report. If there is no concern with how aged the balance is, leave the dates at default.