DEMOGRAPHIC REPORT

NOTES

Demographics reports are used to obtain demographic information on a large set of patient accounts, at once, rather than going to each individual account to obtain. It is important to note that these reports will require to run overnight before data is available.

GO TO

To create a demographic report, go to:

Patients → Demographic Report

STEPS

1. Choose your filters (the areas of the system that data will be extracted from). It is also important to note that as part of your front desk workflow training you will learn that in the patient management area of an account, you can designate a location(s) to a patient. If you do this, you can then select a location(s) under the location field. If you opt NOT to match a patient, then DO NOT select a location(s) as it will not yield any results, as no patients would be directly related to any location
2. Select your display characters (demographic information), which is the information sets you are looking to populate into your report. Please note that you can also choose 'Print Order' (how the columns appear in row order), in addition to Sort Order', meaning your report will appear A-Z (ASC), Z-A (DESC) or N/A
3. Click Run Report (Again, this will take overnight to run)

STEPS

The next day, you can go back to PATIENTS → DEMOGRAPHIC REPORT, and scroll to the bottom of the page to access your report.

You will note that each report has a report ID, Name, Created On, Created By, in addition to three options:

- Option 1 – 'View Results'- This will allow you to view the results in a new window screen.
- Option 2 – "Export" – This will allow you to export the file to a .csv excel file.
- Option 3 – Delete – Since no reports will automatically delete, this will give you the option to manually delete a report.