Take Control With Reports
Tim Proctor and Maria Horn
User's Conference 2014

Here are some of the things you'll do during this practice session:

- Log into the Dashboard
- Identify your top priorities according to your Dashboard scores
- Identify at least one thing you could do to improve your performance in these top priority areas
- Experience some specific areas of the Dashboard we feel are most relevant
- Experience a couple relevant 'srs' reports
- Experience how to use recaller to calculate a new clinical measure

Instructions for newer or prospective PCC clients (online 6 months ago or less): You may not have enough of a data sample to achieve accurate results for some Dashboard measures related to practice revenue and A/R. If you want to see a sample of Dashboard results, please see a PCC staff member for assistance with using a demo login. You should still connect to your own system for exercises 6-7.

Exercise 1 - What are the top three priorities identified for your practice according to your pulse scores?

Priority #1: ____________________________ Score: _________
Priority #2: ____________________________ Score: _________
Priority #3: ____________________________ Score: _________

For each of the priorities, identify at least one initiative you could take to try to improve on your results:

Priority #1: ______________________________________________________
______________________________________________________________
______________________________________________________________

Control Your Future™
Priority #2: _____________________________________________________
______________________________________________________________
______________________________________________________________

Priority #3: _____________________________________________________
______________________________________________________________
______________________________________________________________

Exercise 2 - What is the “PCC Client Average” benchmark for the Revenue-per-Visit measure?

$_______ deposited per-patient visit

Exercise 3 - What is the value that represents the “Top Performers” (90th percentile) for the “Well Visit Rates – Patients 12-21 years” measure?

_______ Percentile

Exercise 4 - How many active ADD/ADHD patients do you have at your practice according to the Dashboard? ____________

What percentage of your total active patient population does this represent? ____________

Exercise 5 - From the “Productivity” tab in the Dashboard, view your June year-to-date “Total Visits” productivity for “All Providers” and “All Locations”. How do you compare to previous years?

What is your percentage increase or decrease compared to last year?
____% increase/decrease

Pick just one provider and view their June year-to-date “total visits” productivity compared to prior years. Has it increased or decreased? View the trends for just the sick or well visit type.
Exercise 6 - What is the copay collection ratio for visits occurring each day last week? Use the “Copay Collection Ratio” report found in the “Billing and Collections” category within srs. Use a date range of 7/6/14 – 7/13/14.

Note: It is best to run this report for dates in the recent past (within the past couple weeks) to get a true report of time-of-service copay collection rate. Technically, if a copay is unpaid at the time of service then later billed to the patient and collected shortly after, it will count as paid on this report.

Exercise 7 - What percentage of your patients turning two years old in the past year are overdue for a developmental screening? Also, generate a list of the patients who are overdue. Use the Partner recaller program for this. (Partner Reports → Patient/Account Reports → Patient Recaller)

# patients turning two years old in the past year: ____________
# patients overdue for a developmental screening: _____________

You will need to add the following criteria to generate a listing of all patients turning two years old in the past year:

- Include by Age (specify age “between 2 and 3 years old calculated from today”)
- Exclude by Patient Flags (to exclude patients with any type of “inactive” flag)
- Exclude by Account Flags (to exclude patients whose account has any type of “inactive” flag)

To get a listing of these patients who are overdue for a developmental screening, add the following criteria to the above list:

- Exclude by Procedure (All Providers) – when prompted enter “past 2 yrs” and choose all the procedure entries your practice may use for developmental screening.

Hint: When prompted for procedure(s), press <F6> to search by pattern and search for the
CPT code 96110 which you should be using for these developmental screenings. Select all procedures with this code.

Once you get a listing that works, use <F4> to save your criteria so you can restore it next time without having to enter it all again!