Guided Exercises for Reporting Theme

Here are some experiences you'll get during the practice session:

- Log into their Dashboard
- Identify their top priorities according to their Dashboard scores
- Identify at least one thing they could do to improve their 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 6-8.

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 results:

Priority #1: _____

_____

_____

Priority #2: _____

_____

_____

Priority #3: _____

_____

_____

Exercise #2: What is your percentile ranking among PCC clients for your current (actual) Revenue-per-Visit performance?

_____ Percentile

Exercise #3: What is the value that represents the 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.

For the following exercises connect to your own system and log into Partner

Exercise #6: What percentage of last week's scheduled appointments were canceled or missed? Use the report "Appointment Totals by Status" in the "Scheduling Reports" category of `srs`. Use a date range of 7/8/13 through 7/12/13.

_____% Canceled
_____% Missed

Exercise #7: 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 7/7/13 – 7/13/13.

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 #8: 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!