

Systems for Dentists

# KPI Reports for Practice Managers Guide to SFD

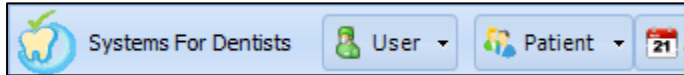
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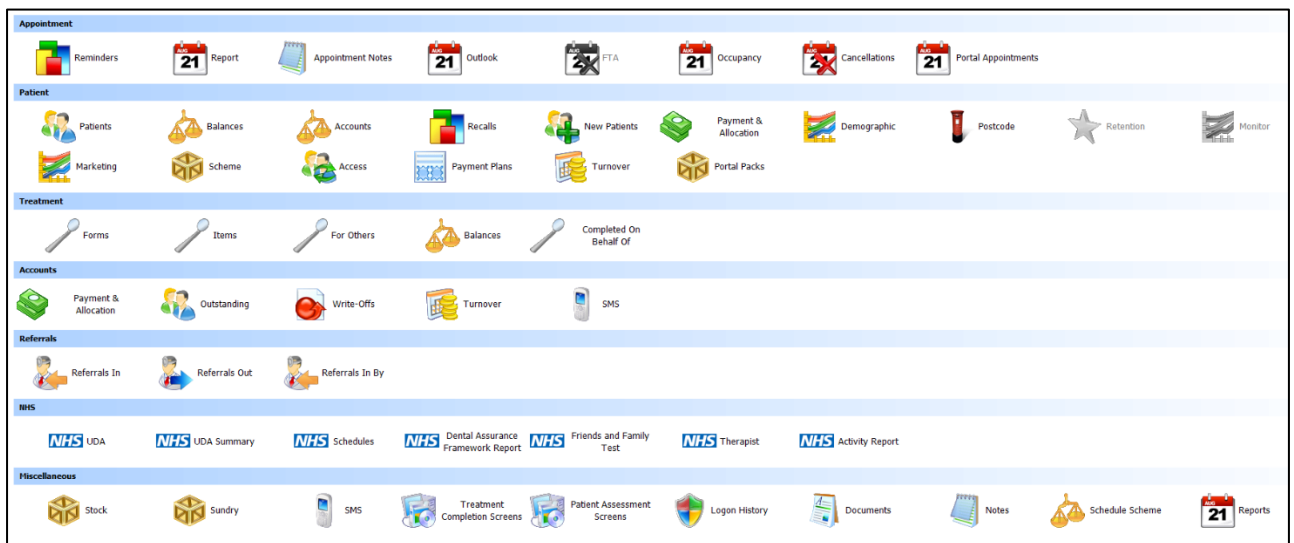
## Introduction

In SFD reports can be created to analyse key performance indicators (KPI) of performers and patients. These reports allow you track to practitioner performance, analyse business areas of top performance and areas for development. Patient information can be analysed to see patient in debit, DNA appointments or patients without recall appointment, plus many more. This guide discusses the reports that a practice manager may find useful for managing and checking KPI's.

Reports can be accessed by selecting the SFD tooth in the top left of the SFD software.



The Reports menu will appear which is split into different reporting sections.

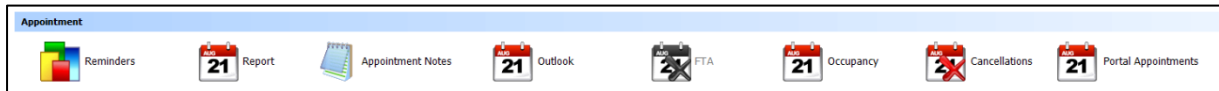


## Appointment Reports

In SFD the appointments section looks at data from the open appointment books. The information can be filtered by performer or by scheme.

### Report

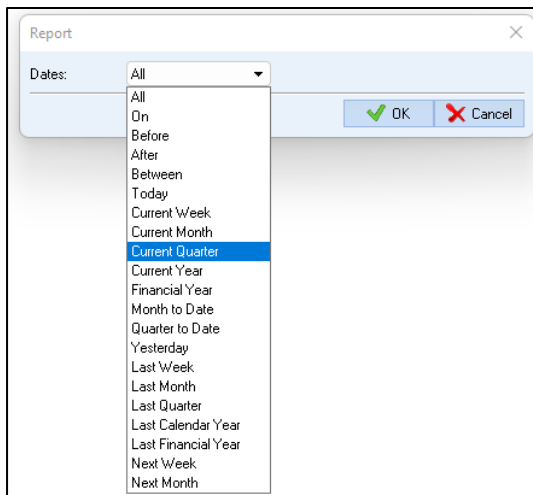
The appointment **report** can be found in the appointment section. Click the **Report** icon.



Select the **Report** button to generate the report.



Select the **date range** from the drop-down options menu.



When the report generates you can navigate through each tab to view various appointment data. The attendance tab will show the occupancy of each performer.

Select **by period** and **by Count**. This will show the occupancy of each performer for the given time period that you have selected.

**NB: As a practice manager you are looking for over 90% occupancy rate with a top target of 98%.**

Dates: <b>01/01/2022 to 31/12/2022</b>						
Book:	(all)	Scheme:	(all)			
Attendance	DNA	Hygienist	Reasons	Reason	Patient / Reason	Cancellations
Period: by period		View: by count				
Date	Book	User	Open (mins)	Vacant (mins)	%	Ontime
Total	HUSKINS, Martin	HUSKINS, Martin	420	175	58%	1
Total	HUSKINS, Martin	HUSKINS, Martin	560	225	60%	0
Total	HUSKINS, Martin	HUSKINS, Martin	330	135	59%	0
Total	HUSKINS, Martin	HUSKINS, Martin	330	40	88%	0

The **DNA** tab shows appointments that patients did not attend. The report will also show the number of hours/ minutes that have been lost to DNA appointment. The report can be filtered by book, scheme and urgency.

**NB: It is important to note that this tab only displayed the information. A similar report can be created using the patient report, where patients can be directly contacted from the report in a block,**

Report

Print

Patient

Export

Dates:

01/01/2022 to 31/12/2022

Book:

(all)

Scheme:

(all)

Urgent:

(n/a)

Attendance

DNA

Hygienist

Reasons

Reason

Patient / Reason

Cancellations

Patient

Portal

Date /	Time	Book	Performer	Patient	DOB	Duration					Reason
01/01/2022	9:00 am	HUSKINS, Martin	HUSKINS, Martin	METCALFE, Cerys	11/05/2008	30					(unknown)
01/01/2022	9:30 am	HUSKINS, Martin	TAYLOR, Nigel	ROSAMOND, Lucas	25/02/1970	20					(unknown)
01/01/2022	9:50 am	HUSKINS, Martin	TAYLOR, Nigel	WOLL, Cameron	22/04/1964	20					(unknown)
01/01/2022	10:00 am	RILEY, Elizabeth	HUSKINS, Martin	AYLOR, Alex	27/01/2006	40					(unknown)
01/01/2022	10:00 am	Nigel Taylor	TAYLOR, Nigel	PROVANCE, Imogen	12/10/1998	20					(unknown)
01/01/2022	10:10 am	HUSKINS, Martin	HUSKINS, Martin	ASHURST, Tom	05/01/1998	15					(unknown)

The Hygiene tab will show all hygiene appointments. You need to select by period to see hygiene appointments, DNA and PLC (Patients late cancellation). This data will only be related to hygiene appointments.

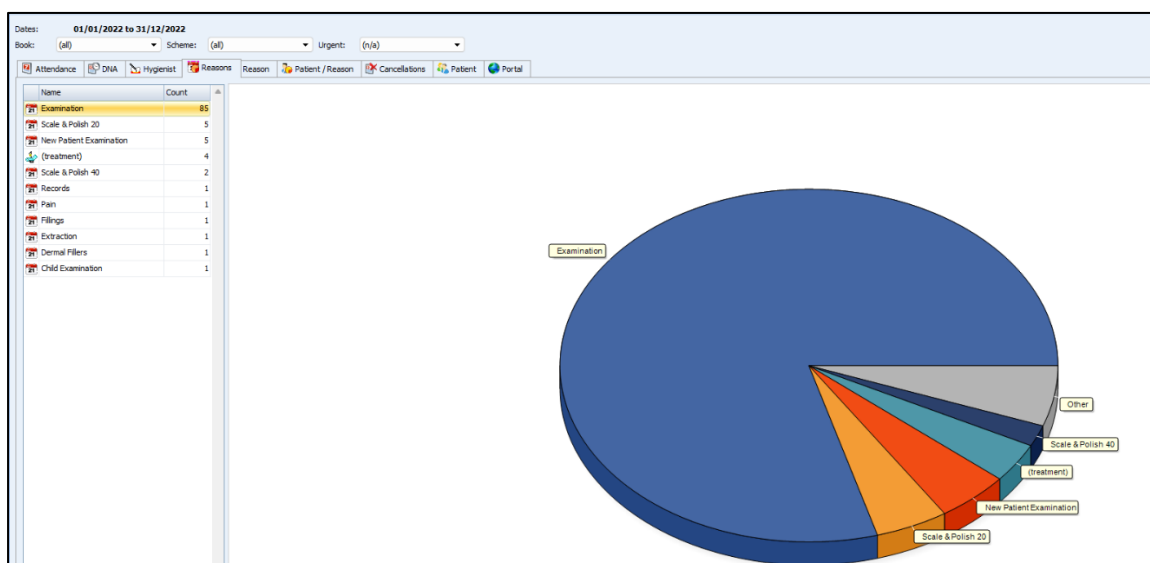
BOOK: (all)

AttendanceDNAHygienistReasonsReasonPatient / ReasonCancellationsPatientPortal

Period: by periodView: by countDentist: (all)

Date	Book	Hygienist	Dentist	Attend	DNA	PLC
Total	RILEY, Elizabeth	RILEY, Elizabeth		1	2	0
Total	RILEY, Elizabeth	RILEY, Elizabeth	HUSKINS, Martin	3	2376	6
Total	RILEY, Elizabeth	RILEY, Elizabeth	TAYLOR, Nigel	0	26	0

The reasons tab will show a pie chart with the various reasons for appointments. The report can be filtered by book, scheme and urgency. **NB: this report is useful for an overview and help to target marketing campaigns.**



The **patient/Reason tab** allows you to view the data for patient's reason for an appointment. The report can be filtered by reason by selecting the reason from the drop down.

Dates: 01/01/2022 to 31/12/2022  
 Book: (all) Scheme: NHS Urgent: No

Attendance DNA Hygienist Reasons Reason Patient / Reason Cancellations Patient Portal

Reason: (all) (treatment)

Date	Reason	Patient	DOB	Reason	SCHEME_IM	REASON	URGENT
29/07/2022	Child Examination	BOLTON, REECE MR	19/02/1978	(treatment)	140	-2	False
17/08/2022	Crown / Bridge Prep	IINS, Martin	DAGGETT, Max Mr	(treatment)	140	-2	False
17/08/2022	Debond	IINS, Martin	DAGGETT, Max Mr	(treatment)	140	-2	False
09/12/2022	Dermal Fillers	IINS, Martin	NICHOLLS, Mason Mr	(treatment)	140	-2	False

The **Cancellation tab** allows you to track cancellations in more depth. As these can be filtered by cancellation reason.

Dates: 01/01/2022 to 31/12/2022  
 Book: (all) Scheme: NHS Urgent: No

Attendance DNA Hygienist Reasons Reason Patient / Reason Cancellations Patient Portal

Reason: (all)

Date	Reason	Patient	DOB	Duration	Reason
04/05/2022	(by practice)	OR, Nigel	ANNAND, Amelia	50	Patient Cancelled
04/05/2022	(by patient)	OR, Nigel	AGER, Yasmin	20	Patient Cancelled
04/05/2022	Arrived To Late So Rebooked	IINS, Martin	MANTELL, Imogen	15	Patient Cancelled
22/04/2022	Could Not Wait So Rebooked	IINS, Martin	MARKWELL, Matthew	15	Patient Cancelled
14/04/2022	Dentist Ill	IINS, Martin	UPTON, Jake	15	Patient Cancelled
12/04/2022	Made In Error	IINS, Martin	BARRUS, Freya	15	Patient Cancelled
11/04/2022	Patient Cancelled	IINS, Martin	WIGLESWORTH, Oscar	20	Patient Cancelled

The **patient tab** lists all the appointment that have taken place in that reporting period. This report can be filtered by book and scheme.

Dates: 01/01/2022 to 31/12/2022  
 Book: (all) Scheme: NHS

Attendance DNA Hygienist Reasons Reason Patient / Reason Cancellations Patient Portal

Date	Time	Book	User	Patient	DOB	NI	Duration
23/09/2022	9:45 am	HUSKINS, Martin	HUSKINS, Martin	JANNEY, Josh	21/06/1972		20
26/09/2022	11:15 am	HUSKINS, Martin	HUSKINS, Martin	HAMMING, Archie Mr	25/10/1965		15
26/09/2022	2:00 pm	HUSKINS, Martin	HUSKINS, Martin	HAYMAN, George	01/07/1985		20
28/09/2022	11:25 am	HUSKINS, Martin	HUSKINS, Martin	HOVEL, Erin Miss	11/04/1995		35
05/10/2022	10:00 am	HUSKINS, Martin	HUSKINS, Martin	MADER, Kieran Mr	21/04/1973		35
07/10/2022	2:15 pm	HUSKINS, Martin	HUSKINS, Martin	KEECH, Tegan	16/05/1995		15

The **portal tab** will show all patient appointments that have been booked using the online patient portal. This report can be filtered by book and scheme.

Dates: 01/01/2022 to 31/12/2022  
 Book: (all) Scheme: NHS

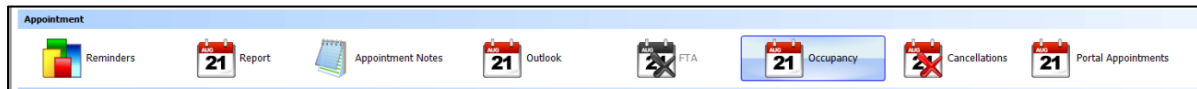
Attendance DNA Hygienist Reasons Reason Patient / Reason Cancellations Patient Portal

Date	Time	Book	User	Patient	DOB	Duration
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## Occupancy Report

In SFD the **occupancy** report can be located in the **appointments** section of the reports screen. This report allows you to see the number of hours spent on appointment versus appointment availability. Occupancy will be shown as a percentage.

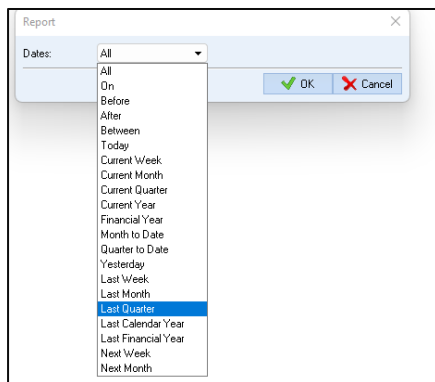
**NB: As a practice manager you are looking for over 90% occupancy rate with a top target of 98%.**



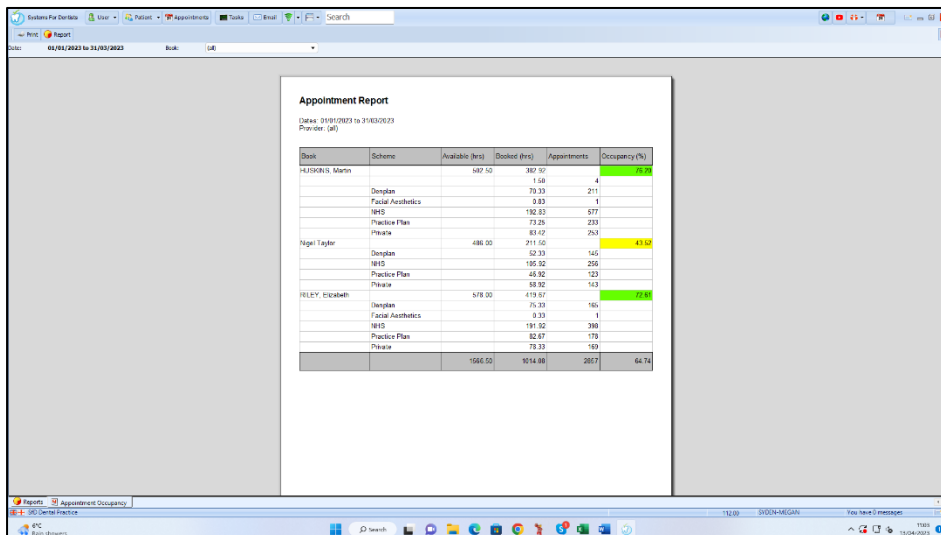
Select **report**



Select your required **date range** from the drop down.

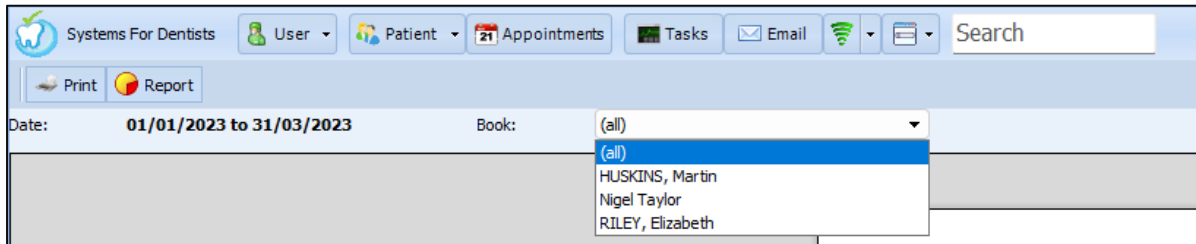


The report will appear, which can be printed as a hard copy or printed to PDF and saved as a document.



Book	Scheme	Available (hrs)	Booked (hrs)	Appointments	Occupancy (%)
HUSKINS, Martin		587.50	387.50	4	65.78
			1.58	4	
	Dentplan		79.33	211	
	Facial Aesthetics		9.83	1	
	NHS		192.50	577	
Nigel Taylor		486.00	211.50	253	43.52
			52.33	145	
	NHS		195.52	255	
	Practice Plan		48.82	123	
	Private		58.92	163	
RILEY, Elizabeth		518.00	419.57	165	79.85
			75.33	165	
	Dentplan		9.33	1	
	Facial Aesthetics		191.52	398	
	NHS		82.67	178	
		1566.50	1014.88	2057	64.74

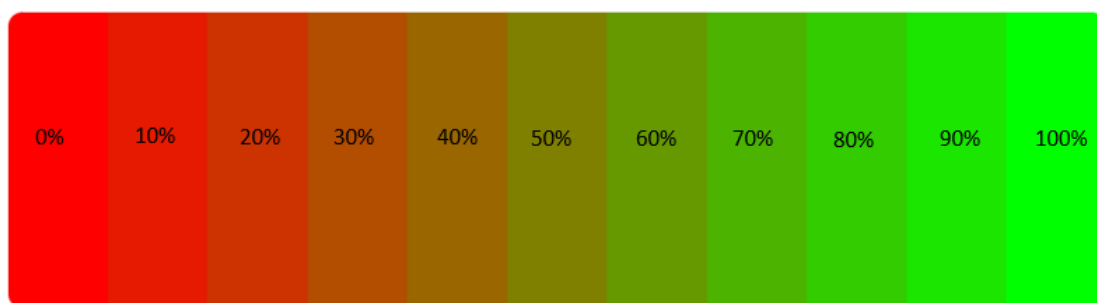
The report can be **filtered** by all performers or by individual books. Select the drop down to choose your filter option.



The screenshot shows the 'Systems For Dentists' interface. At the top, there are tabs for 'User', 'Patient', 'Appointments', 'Tasks', 'Email', and a search bar. Below these, there are 'Print' and 'Report' buttons. The 'Date' field is set to '01/01/2023 to 31/03/2023'. The 'Book' dropdown menu is open, showing options: '(all)', 'HUSKINS, Martin', 'Nigel Taylor', and 'RILEY, Elizabeth'.

## **Banding**

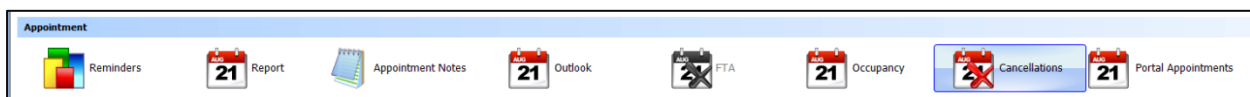
The colour scheme on the Occupancy report changes in 10% increments. From 0 to 100%



## *Cancellation Report*

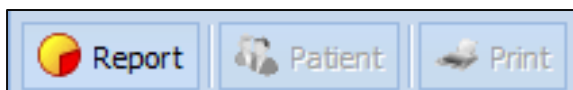
In SFD the **cancellation report** allows you to look at the reasons for cancellations over a given period of time.

The report can be located in the **appointment section** of the reports screen. Select the **Cancellation button**.



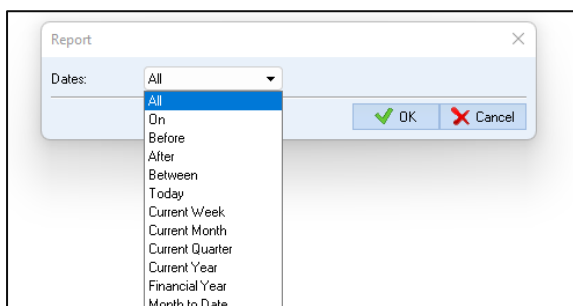
The screenshot shows the 'Appointment' section of the Reports screen. It contains several icons and labels: 'Reminders', 'Report' (with a calendar icon), 'Appointment Notes' (with a notepad icon), 'Outlook' (with a calendar icon), 'FTA' (with a calendar icon), 'Occupancy' (with a calendar icon), 'Cancellations' (with a calendar icon and a red 'X'), and 'Portal Appointments' (with a calendar icon).

Select **report** to generate the report.



The screenshot shows the 'Report' button, which is highlighted in blue. It is located next to the 'Patient' and 'Print' buttons.

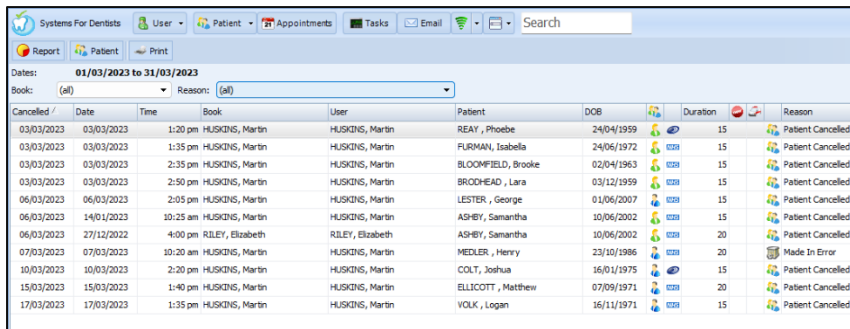
Select the date range from the drop-down options.



The screenshot shows the 'Report' dialog box. It has a 'Dates:' label and a dropdown menu. The dropdown menu is open, showing options: 'All', 'On', 'Before', 'After', 'Between', 'Today', 'Current Week', 'Current Month', 'Current Quarter', 'Current Year', 'Financial Year', and 'Month to Date'. There are 'OK' and 'Cancel' buttons at the bottom right.

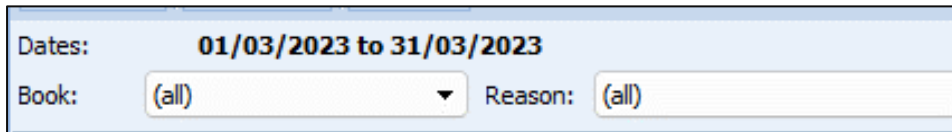


The report will show a list of all cancelled appointments with reasons for the cancellation.



Cancelled /	Date	Time	Book	User	Patient	DOB	Duration	Reason
03/03/2023	03/03/2023	1:20 pm	HUSKINS, Martin	HUSKINS, Martin	REAY, Phoebe	24/04/1959	15	Patient Cancelled
03/03/2023	03/03/2023	1:35 pm	HUSKINS, Martin	HUSKINS, Martin	FURMAN, Isabella	24/06/1972	15	Patient Cancelled
03/03/2023	03/03/2023	2:35 pm	HUSKINS, Martin	HUSKINS, Martin	BLOOMFIELD, Brooke	02/04/1963	15	Patient Cancelled
03/03/2023	03/03/2023	2:50 pm	HUSKINS, Martin	HUSKINS, Martin	BRODHEAD, Lara	03/12/1959	15	Patient Cancelled
06/03/2023	06/03/2023	2:05 pm	HUSKINS, Martin	HUSKINS, Martin	LESTER, George	01/06/2007	15	Patient Cancelled
06/03/2023	14/01/2023	10:25 am	HUSKINS, Martin	HUSKINS, Martin	ASHBY, Samantha	10/06/2002	15	Patient Cancelled
06/03/2023	27/12/2022	4:00 pm	RILEY, Elizabeth	RILEY, Elizabeth	ASHBY, Samantha	10/06/2002	20	Patient Cancelled
07/03/2023	07/03/2023	10:20 am	HUSKINS, Martin	HUSKINS, Martin	MEDLER, Henry	23/10/1986	20	Made In Error
10/03/2023	10/03/2023	2:20 pm	HUSKINS, Martin	HUSKINS, Martin	COLT, Joshua	16/01/1975	15	Patient Cancelled
15/03/2023	15/03/2023	1:40 pm	HUSKINS, Martin	HUSKINS, Martin	ELLCOTT, Matthew	07/09/1971	20	Patient Cancelled
17/03/2023	17/03/2023	1:35 pm	HUSKINS, Martin	HUSKINS, Martin	VOLK, Logan	16/11/1971	15	Patient Cancelled

The report can be **filtered** by performer and reason, by using the filter drop-downs.



Dates: **01/03/2023 to 31/03/2023**

Book: **(all)** Reason: **(all)**

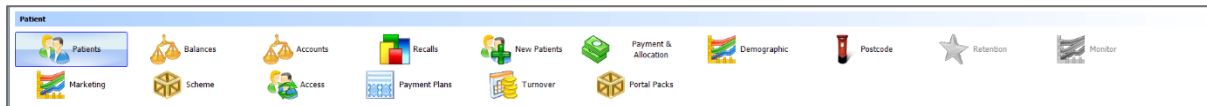
## Patient Reports

In SFD the patient's report is extremely powerful. This report allows you to query a wide variety of patient data.

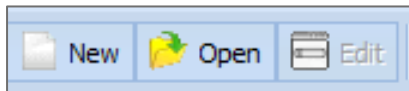
You can run a patient accounts report using the patient report features to find patients that have a balance over a certain value.

### Patient Report (Accounts info)

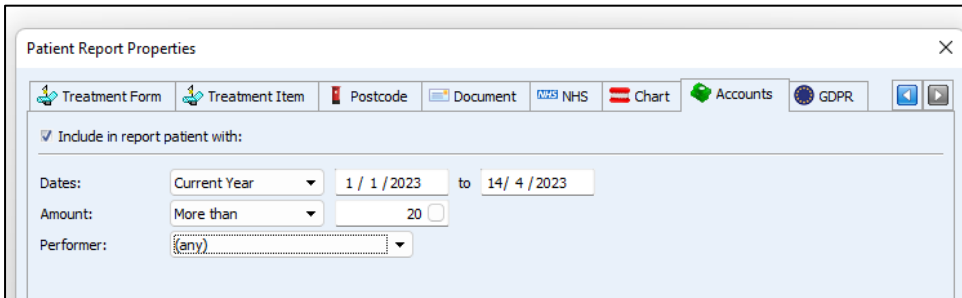
Select **Patient** from the **Patient section** in the report menu.



Select **new**



Scroll along the tab using the arrows until you see the **accounts** tab.

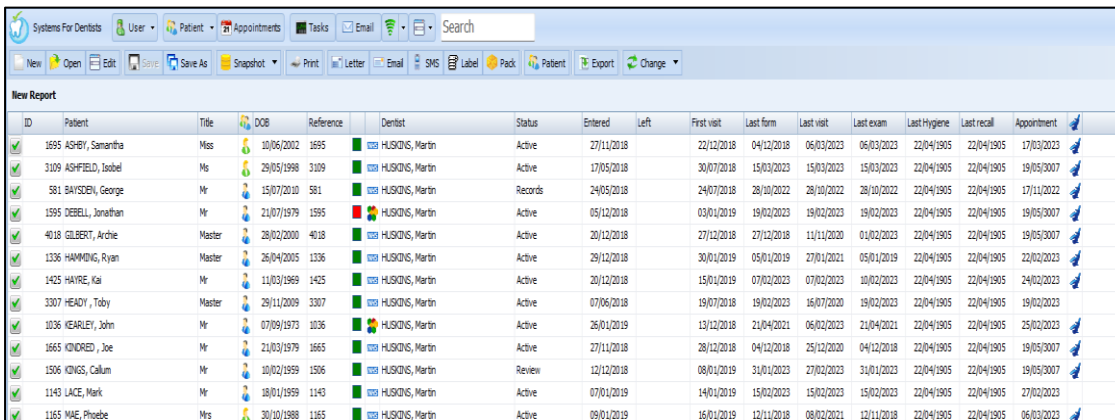


Tick the box to **include in report**.

Select your **dates range** from the drop-down.

Select the **amount** option from the drop down and type in the value. For example, patient owing more than £20 on their account.

This report can also be filtered by performer.

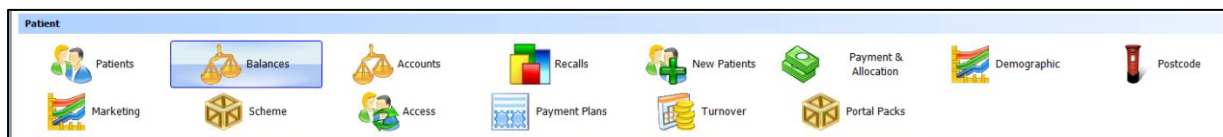


ID	Patient	Title	DOB	Reference	Dentist	Status	Entered	Left	First visit	Last form	Last visit	Last exam	Last Hygiene	Last recall	Appointment
1695	ASHBY, Samantha	Miss	10/06/2002	1695	HUSKINS, Martin	Active	27/11/2018		22/12/2018	04/12/2018	06/03/2023	06/03/2023	22/04/1905	22/04/1905	17/03/2023
3109	ASHFIELD, Isabel	Ms	29/05/1998	3109	HUSKINS, Martin	Active	17/05/2018		30/07/2018	15/03/2023	15/03/2023	15/03/2023	22/04/1905	22/04/1905	19/05/2007
581	BAISEN, George	Mr	15/07/2010	581	HUSKINS, Martin	Records	24/07/2018		28/10/2022	28/10/2022	28/10/2022	22/04/1905	22/04/1905	17/11/2022	
1595	DEBELL, Jonathan	Mr	21/07/1979	1595	HUSKINS, Martin	Active	05/12/2018		03/01/2019	19/02/2023	19/02/2023	19/02/2023	22/04/1905	22/04/1905	19/05/2007
4018	GILBERT, Archie	Master	28/02/2000	4018	HUSKINS, Martin	Active	20/12/2018		27/12/2018	27/12/2018	11/11/2020	01/02/2023	22/04/1905	22/04/1905	19/05/2007
1336	HAMMING, Ryan	Master	26/04/2005	1336	HUSKINS, Martin	Active	29/12/2018		30/01/2019	05/01/2019	27/01/2021	05/01/2019	22/04/1905	22/04/1905	22/02/2023
1425	HAYRE, Kai	Mr	11/03/1969	1425	HUSKINS, Martin	Active	20/12/2018		15/01/2019	07/02/2023	07/02/2023	10/02/2023	22/04/1905	22/04/1905	24/02/2023
3307	HEADY, Toby	Master	29/11/2009	3307	HUSKINS, Martin	Active	07/06/2018		19/07/2018	19/02/2023	16/07/2020	19/02/2023	22/04/1905	22/04/1905	19/02/2023
1036	HEARLEY, John	Mr	07/09/1973	1036	HUSKINS, Martin	Active	26/01/2019		13/12/2018	21/04/2021	06/02/2023	21/04/2021	22/04/1905	22/04/1905	25/02/2023
1665	KINGRED, Joe	Mr	21/03/1979	1665	HUSKINS, Martin	Active	27/11/2018		28/12/2018	04/12/2018	25/12/2020	04/12/2018	22/04/1905	22/04/1905	19/05/2007
1506	KINGS, Calum	Mr	10/02/1959	1506	HUSKINS, Martin	Review	12/12/2018		08/01/2019	31/01/2023	27/02/2023	31/01/2023	22/04/1905	22/04/1905	19/05/2007
1143	LACE, Mark	Mr	18/01/1959	1143	HUSKINS, Martin	Active	07/01/2019		14/01/2019	15/02/2023	15/02/2023	15/02/2023	22/04/1905	22/04/1905	27/02/2023
1165	MAE, Phoebe	Mrs	30/10/1988	1165	HUSKINS, Martin	Active	09/01/2019		16/01/2019	12/11/2018	08/02/2021	12/11/2018	22/04/1905	22/04/1905	06/03/2023

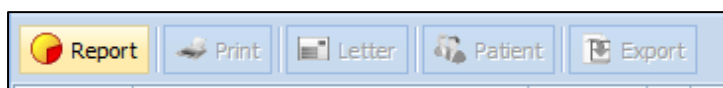
## Balance Report (Bad Debt)

If SFD you can generate a report to show any patient with a debit account (Patients with outstanding balances).

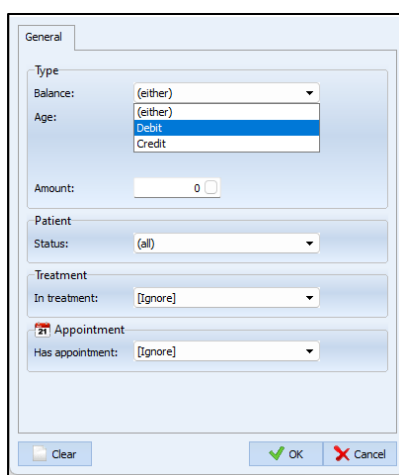
In the reports menu select **Balance** from the **Patient** section.



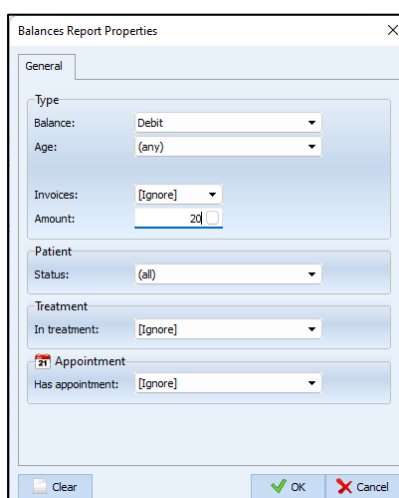
## Select Report



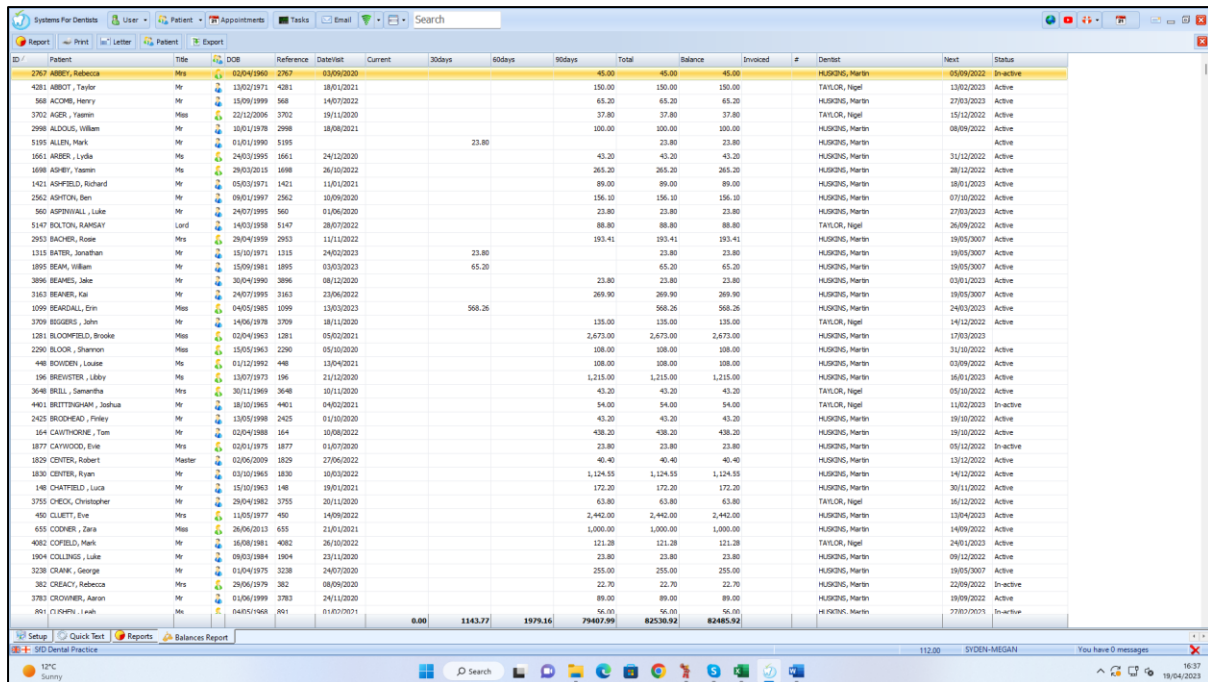
Select Balance type from the drop-down option. If you are looking for patients with a Debit balance, select debit from this list.



Add in the value you are looking for. For example, patients with balances over £20. You can also choose from the other option boxes what their patient status is, if they are currently in treatment or not and whether they have a booked appointment.



When the report runs a list will be provided with patient that meet your chosen criteria.



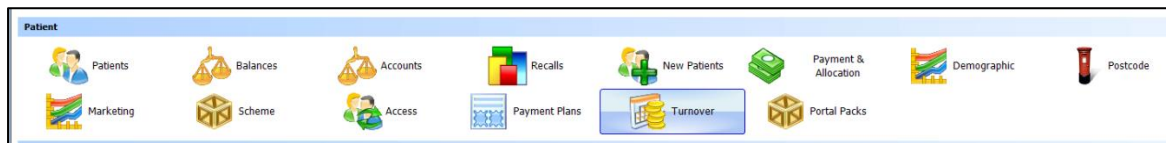
ID	Patient	Title	DOB	Reference	Dateline	Current	30days	60days	90days	Total	Balance	Invoice	#	Dentist	Next	Status
2367	ABBITT, Rebecca	Mrs	02/04/1960	3767	08/09/2020					45.00	45.00	45.00		HUGHES, Martin	08/09/2022	Inactive
4261	ABOTT, Taylor	Mr	13/02/1971	4261	08/01/2021					150.00	150.00	150.00		TAYLOR, Nigel	13/02/2023	Active
568	ACORN, Henry	Mr	15/09/1999	568	14/07/2022					65.20	65.20	65.20		HUGHES, Martin	27/03/2023	Active
3702	AGER, Yassin	Miss	22/12/2006	3702	19/11/2020					37.80	37.80	37.80		TAYLOR, Nigel	15/12/2022	Active
2998	ALDOUS, William	Mr	10/01/1978	2998	18/08/2021					100.00	100.00	100.00		HUGHES, Martin	08/09/2022	Active
5195	ALLEN, Mark	Mr	01/01/1990	5195			23.80				23.80	23.80		HUGHES, Martin		Active
1661	ARER, Lydia	Ms	24/03/1995	1661	24/12/2020					43.20	43.20	43.20		HUGHES, Martin	31/12/2022	Active
1898	ASHBY, Yassin	Ms	29/03/2015	1898	28/10/2022					265.20	265.20	265.20		HUGHES, Martin	28/10/2022	Active
1421	ASHFIELD, Richard	Mr	05/03/1971	1421	11/01/2021					89.00	89.00	89.00		HUGHES, Martin	18/01/2023	Active
2562	ASHTON, Ben	Mr	09/01/1997	2562	10/09/2020					156.10	156.10	156.10		HUGHES, Martin	07/10/2022	Active
560	ASPINWALL, Luke	Mr	24/07/1995	560	01/06/2020					23.80	23.80	23.80		HUGHES, Martin	27/03/2023	Active
5147	BOLTON, RAMSAY	Lord	14/03/1958	5147	28/07/2022					88.80	88.80	88.80		TAYLOR, Nigel	26/09/2022	Active
2953	BACHER, Rose	Mrs	29/04/1959	2953	11/11/2022					193.41	193.41	193.41		HUGHES, Martin	19/05/2007	Active
1315	BATES, Jonathan	Mr	15/10/1971	1315	24/02/2023		23.80				23.80	23.80		HUGHES, Martin	19/05/2007	Active
1895	BEAN, William	Mr	15/09/1981	1895	11/01/2023		65.20				65.20	65.20		HUGHES, Martin	19/05/2007	Active
3096	BEANES, Jake	Mr	30/04/1980	3096	08/12/2020					23.80	23.80	23.80		HUGHES, Martin	03/01/2023	Active
3163	BEARER, Kai	Mr	24/07/1995	3163	23/09/2022					269.90	269.90	269.90		HUGHES, Martin	19/08/2007	Active
1099	BEARDALL, Erin	Miss	04/05/1985	1099	13/03/2023		568.26				568.26	568.26		HUGHES, Martin	24/03/2023	Active
3709	BEGGERS, John	Mr	14/06/1978	3709	18/11/2020					135.00	135.00	135.00		TAYLOR, Nigel	14/12/2022	Active
1281	BLOOMFIELD, Brooke	Miss	02/04/1963	1281	05/02/2021					2,673.00	2,673.00	2,673.00		HUGHES, Martin	17/03/2023	Active
2290	BLOOR, Shannon	Miss	15/05/1963	2290	09/10/2020					108.00	108.00	108.00		HUGHES, Martin	31/10/2022	Active
448	BOWEN, Louise	Ms	01/12/1962	448	13/09/2021					108.00	108.00	108.00		HUGHES, Martin	03/09/2022	Active
196	BREWSTER, Libby	Ms	13/07/1973	196	21/12/2020					1,215.00	1,215.00	1,215.00		HUGHES, Martin	18/01/2023	Active
3648	BRELL, Samantha	Mrs	30/11/1969	3648	10/11/2020					43.20	43.20	43.20		TAYLOR, Nigel	05/10/2022	Active
4401	BRITTINGHAM, Joshua	Mr	18/10/1965	4401	04/02/2021					54.00	54.00	54.00		TAYLOR, Nigel	11/02/2023	In-active
2425	BRODHEAD, Finley	Mr	13/05/1998	2425	01/10/2020					43.20	43.20	43.20		HUGHES, Martin	19/10/2022	Active
164	CAWTHORNE, Tom	Mr	02/04/1988	164	10/08/2022					438.20	438.20	438.20		HUGHES, Martin	19/10/2022	Active
1877	CAYWOOD, Eve	Mrs	02/01/1975	1877	01/07/2020					23.80	23.80	23.80		HUGHES, Martin	05/12/2022	In-active
1828	CENTER, Robert	Master	02/06/2009	1828	27/06/2022					40.40	40.40	40.40		HUGHES, Martin	13/12/2022	Active
1830	CHIVERS, Ryan	Mr	03/01/1965	1830	18/05/2022					1,124.55	1,124.55	1,124.55		HUGHES, Martin	14/12/2022	Active
148	CHATTERFIELD, Luca	Mr	15/10/1963	148	19/01/2021					172.20	172.20	172.20		HUGHES, Martin	30/11/2022	Active
3755	CHEOK, Christopher	Mr	29/04/1982	3755	20/11/2020					63.80	63.80	63.80		TAYLOR, Nigel	16/12/2022	Active
480	CLUETT, Eve	Mrs	11/05/1977	480	14/09/2022					2,442.00	2,442.00	2,442.00		HUGHES, Martin	13/04/2023	Active
655	CODNER, Zara	Miss	26/06/2013	655	21/01/2021					1,000.00	1,000.00	1,000.00		HUGHES, Martin	14/09/2022	Active
4082	COPFIELD, Mark	Mr	16/08/1981	4082	26/10/2022					121.28	121.28	121.28		TAYLOR, Nigel	24/01/2023	Active
1804	COLLINGS, Luke	Mr	09/03/1984	1804	23/11/2020					23.80	23.80	23.80		HUGHES, Martin	09/12/2022	Active
3238	CRANE, George	Mr	01/04/1975	3238	24/07/2020					255.00	255.00	255.00		HUGHES, Martin	19/05/2007	Active
382	CREACY, Rebecca	Mrs	29/04/1976	382	08/09/2020					22.70	22.70	22.70		HUGHES, Martin	22/08/2022	In-active
3763	CROWMER, Aaron	Mr	01/06/1999	3763	24/11/2020					89.00	89.00	89.00		HUGHES, Martin	19/09/2022	Active
801	CUSHER, Leah	Ms	04/05/1968	801	01/03/2021		0.00	1143.77	1979.16	79407.99	82538.92	82485.92		HUGHES, Martin	27/03/2021	In-active

This list can be printed or letters can be generated to be sent to the patients from within this report.

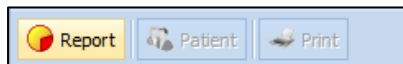
## Turnover

In SFD a report can be created to show the turnover from patients within a specific time frame.

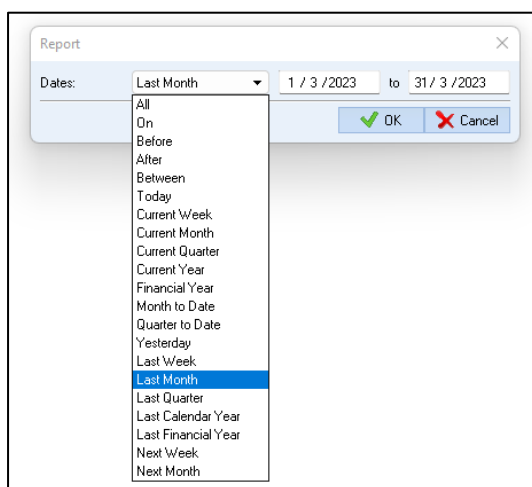
Select **Turnover** in the **Patients** section of the Reports screen.



## Select Report



Select the **date range** from the drop down.



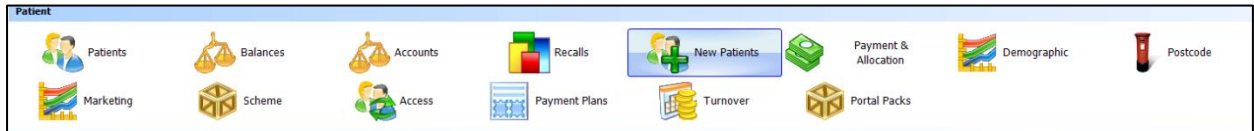
The report will appear showing the patients that have paid for treatment in that date range. The report can also be filtered by performer and scheme type.

Systems For Dentists						
Report						
Dates: <b>01/03/2023 to 31/03/2023</b> Performer: (everyone) Scheme: (all)						
Date	Performer	Scheme	Patient	Item	Description	Amount
03/03/2023	HUSKINS, Martin	NHS	BEAM, William			65.20
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	EX&SP	Exam and Scale & Polish With	78.54
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	XRAY-S	Small Xray (s)	18.48
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	FILL-C-M	Medium Composite Filling	121.28
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	XLA	Extraction	98.18
06/03/2023	HUSKINS, Martin	NHS	ASHBY, Samantha			23.80
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	EX&SP	Exam and Scale & Polish With	78.54
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	FILL-C-M	Medium Composite Filling	121.28
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	DENT-PA	Partial Acrylic Denture	565.95
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	XRAY-S	Small Xray (s)	18.48
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	CR-PBOND	Porcelain Bonded Crown	554.40
10/03/2023	HUSKINS, Martin	NHS	ALLEN, Mark			23.80
10/03/2023	HUSKINS, Martin	NHS	MEAKIN, Harriet			65.20
10/03/2023	HUSKINS, Martin	Private	MEAKIN, Harriet	CONS	Consultation	41.58
10/03/2023	HUSKINS, Martin	Private	MEAKIN, Harriet	HYG	Hygienist Visit	55.44
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	CONS	Consultation	-37.80
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	CONS	Consultation	41.58
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	XRAY-S	Small Xray (s)	18.48
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	FILL-A-L	Large Amalgam Filling	103.95
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	RCT	Root Canal Treatment	404.25
15/03/2023	HUSKINS, Martin	NHS	ASHFIELD, Isobel			65.20
17/03/2023	HUSKINS, Martin	NHS	SMITHEE, Aidan			23.80
20/03/2023	HUSKINS, Martin	Private	JENKINS, James	EX-NP	New Patient Examination	103.95
20/03/2023	HUSKINS, Martin	Private	JENKINS, James	XRAY-S	Small Xray (s)	18.48

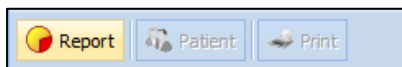
## New patient report

In SFD a report can be created to check the status of new patients, for example if they have been registered and attended an appointment, registered but not attended and whether they are registered with a dentist.

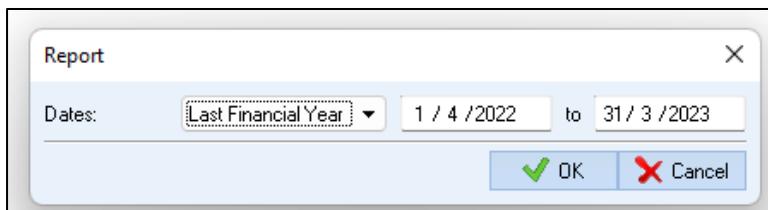
Select **New Patients** from the Patient section of the reports screen.



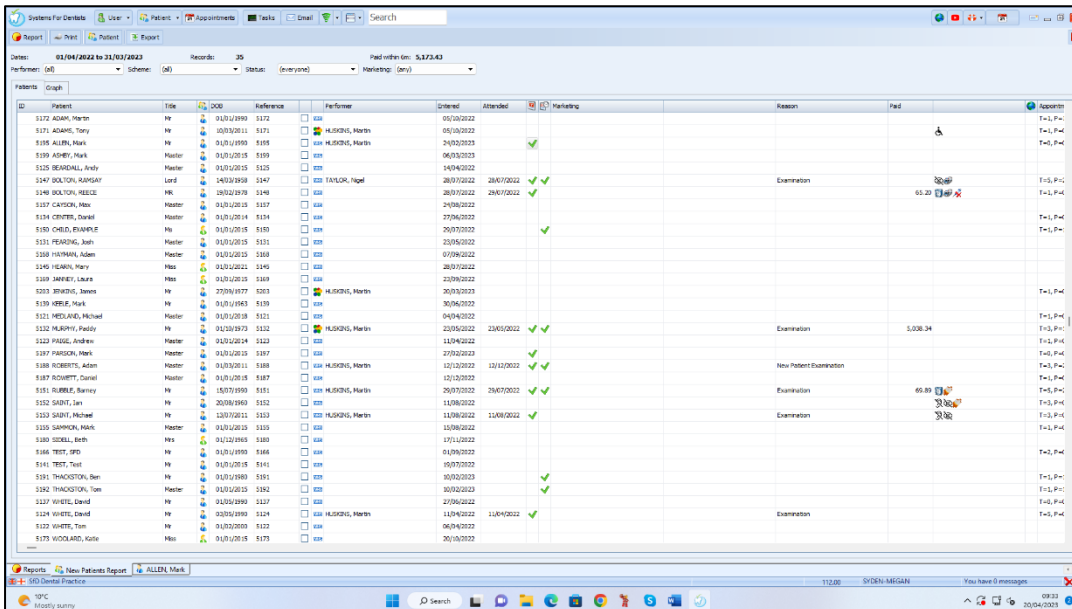
Select report



Select a **date range** from the drop-down list.

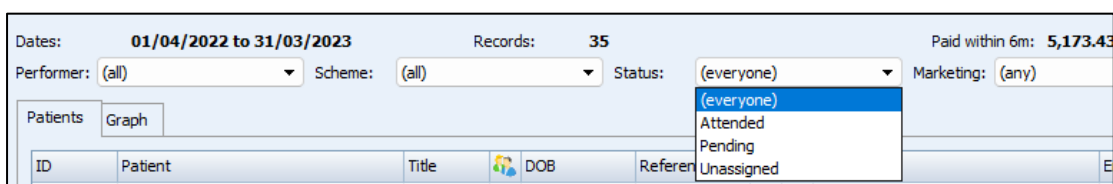


The report will show the data for all new patients in the selected



ID	Patient	Title	DOB	Reference	Performer	Interval	Attended	Marketing	Reason	Paid	Appointment
1171	ADAMS, Helen	Ms	01/01/1990	1171	ALL	05/10/2022					T=1, P=1
1171	ADAMS, Tony	Mr	10/03/2011	1171	ALL	05/10/2022					T=1, P=1
1195	ALLEN, Mark	Mr	01/01/1990	1195	ALL	24/02/2023					T=1, P=1
1195	ALLEN, Mark	Master	01/01/2015	1195	ALL	06/03/2023					T=1, P=1
1215	BEARDALL, Andy	Master	01/01/2015	1215	ALL	14/04/2022					T=1, P=1
1247	BOLTON, RUMSAY	Lord	14/03/1959	1247	ALL	28/07/2022	28/07/2022		Examination	61.20	T=1, P=1
1247	BOLTON, RUMSAY	MR	19/02/1978	1247	ALL	28/07/2022	28/07/2022				T=1, P=1
1257	CARSON, Alex	Master	01/01/2015	1257	ALL	21/06/2022					T=1, P=1
1126	CRIBBLE, David	Master	01/01/2014	1126	ALL	27/06/2022					T=1, P=1
1183	CHOD, EMMANUE	Ms	01/01/2015	1183	ALL	26/07/2022					T=1, P=1
1131	FEARING, Josh	Master	01/01/2015	1131	ALL	27/06/2022					T=1, P=1
1208	HATHORN, Adam	Master	01/01/2015	1208	ALL	07/09/2022					T=1, P=1
1246	HARVEY, Mary	Ms	01/01/2012	1246	ALL	28/07/2022					T=1, P=1
1109	JAMIEY, Laura	Ms	01/01/2015	1109	ALL	27/06/2022					T=1, P=1
1203	JEVENS, James	Mr	27/06/1977	1203	ALL	26/03/2023					T=1, P=1
1139	KEBLE, Mark	Mr	01/01/1963	1139	ALL	30/06/2022					T=1, P=1
1121	KEWLAND, Michael	Master	01/01/2015	1121	ALL	04/04/2022					T=1, P=1
1122	MURPHY, Emily	Ms	01/01/2015	1122	ALL	22/05/2022	22/05/2022		Examination	5,008.24	T=1, P=1
1122	MURPHY, Emily	Master	01/01/2014	1122	ALL	11/04/2022					T=1, P=1
1127	PARSON, Mark	Master	01/01/2015	1127	ALL	27/02/2023					T=1, P=1
1188	ROBERTS, Adam	Master	01/03/2011	1188	ALL	12/12/2022			New Patient Examination		T=1, P=1
1187	SCOTT, David	Master	01/01/2015	1187	ALL	01/10/2022					T=1, P=1
1151	SHARPE, Barney	Mr	15/07/1990	1151	ALL	26/07/2022	26/07/2022		Examination	65.89	T=1, P=1
1152	SHARPE, Ian	Mr	20/08/1960	1152	ALL	11/08/2022					T=1, P=1
1123	SHARPE, Michael	Mr	12/07/2011	1123	ALL	11/08/2022	11/08/2022		Examination		T=1, P=1
1125	SHARPE, Michael	Master	01/01/2015	1125	ALL	11/08/2022					T=1, P=1
1180	SHARPE, Beth	Ms	01/12/1965	1180	ALL	17/11/2022					T=1, P=1
1186	TEST, SP	Mr	01/01/1990	1186	ALL	01/09/2022					T=1, P=1
1141	TEST, Test	Mr	01/01/2015	1141	ALL	16/07/2022					T=1, P=1
1191	THACKSTON, Ben	Mr	01/01/1980	1191	ALL	30/07/2022					T=1, P=1
1192	THACKSTON, Ben	Master	01/01/2015	1192	ALL	30/07/2022					T=1, P=1
1117	WATTS, David	Mr	01/01/1990	1117	ALL	27/06/2022					T=1, P=1
1124	WATTS, David	Mr	03/05/1990	1124	ALL	11/04/2022	11/04/2022		Examination		T=1, P=1
1122	WATTS, Tom	Mr	01/03/2009	1122	ALL	06/04/2022					T=1, P=1
1175	WISLAND, Kate	Ms	01/01/2015	1175	ALL	30/10/2022					T=1, P=1

The report can be filtered by performer, scheme and patient status.

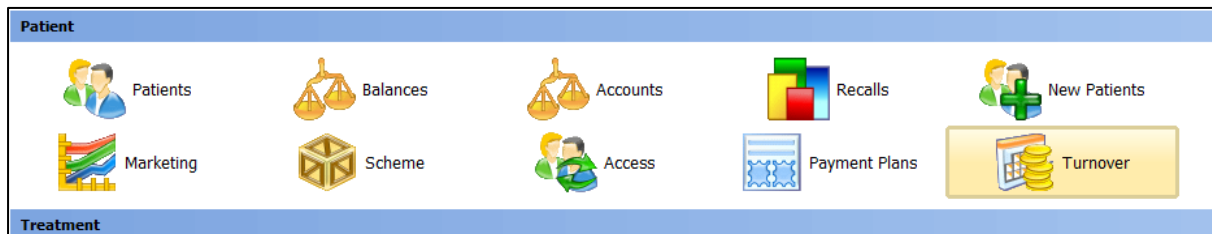


## Accounts Report

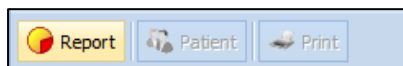
### Turnover

In SFD a report can be created to show the turnover for a specific date range.

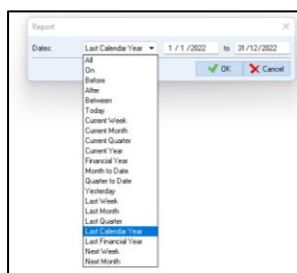
Select **Turnover** in the **Patient section** of the report screen.



Select **Report**



Select the **date range** from the drop-down list.



The report will show the **turnover for the selected date range**. The report can be filtered by performer.

Systems for Dentists						
<div> <div>User</div> <div>Patient</div> <div>Appointments</div> <div>Tasks</div> <div>Email</div> <div>Search</div> </div>						
<div> <div>Report</div> <div>Patient</div> <div>Print</div> <div>Export</div> </div>						
<div> <div>Dates:</div> <div>01/10/2023 to 31/10/2023</div> </div>						
<div> <div>Performer:</div> <div>(everyone)</div> </div>						
<div> <div>Scheme:</div> <div>(all)</div> </div>						
Date	Performer	Scheme	Patient	Item	Description	Amount
09/10/2023	Practice	Un-assigned	KEMPE, Phoebe	INT02	TePe Brushes - Orange	3.60
09/10/2023	HUSKINS, Martin	NHS	KEMPE, Phoebe			306.80
09/10/2023	HUSKINS, Martin	NHS	LEEKE, Charlie			25.80
11/10/2023	HUSKINS, Martin	NHS	GILLIAM, Daisy			306.80
13/10/2023	Practice	Un-assigned	DEEP, Summer	FL01	Oral B Satin Floss	2.10
13/10/2023	Practice	Un-assigned	DEEP, Summer	FL06	Crest Glide Floss	2.85
13/10/2023	HUSKINS, Martin	NHS	DEEP, Summer			70.70
13/10/2023	HUSKINS, Martin	NHS	BURKES, Henry			306.80
13/10/2023	HUSKINS, Martin	NHS	BATCHELLER, Bradley			25.80
13/10/2023	HUSKINS, Martin	Private	GILLIAM, Daisy	EX+NP	New Patient Examination	103.95
13/10/2023	HUSKINS, Martin	Private	GILLIAM, Daisy	XRAY-S	Small Xray (s)	18.48
13/10/2023	HUSKINS, Martin	Private	GILLIAM, Daisy	S/P	Scale And Polish	33.00
16/10/2023	HUSKINS, Martin	NHS	FLANDERS, Jake			306.80
18/10/2023	HUSKINS, Martin	NHS	BLACKSTON, Kate			306.80
18/10/2023	HUSKINS, Martin	Private	BASKERVILLE, Edward	CONS	Consultation	41.58
18/10/2023	HUSKINS, Martin	Private	BASKERVILLE, Edward	FILL-A-L	Large Amalgam Filling	150.00
20/10/2023	HUSKINS, Martin	NHS	CAWTHORNE, Tom			306.80
23/10/2023	HUSKINS, Martin	NHS	WEAKLY, Adam			306.80
25/10/2023	HUSKINS, Martin	NHS	BARRETT, Mia			70.70
26/10/2023	Practice	Un-assigned	SMETHE, Eve	FL01	Oral B Satin Floss	2.10
26/10/2023	HUSKINS, Martin	NHS	YARNALL, Oliver			25.80
26/10/2023	HUSKINS, Martin	NHS	KNOX, Samantha			25.80
26/10/2023	HUSKINS, Martin	NHS	KEMPE, Phoebe			25.80
						2,775.66



## Treatment Reports

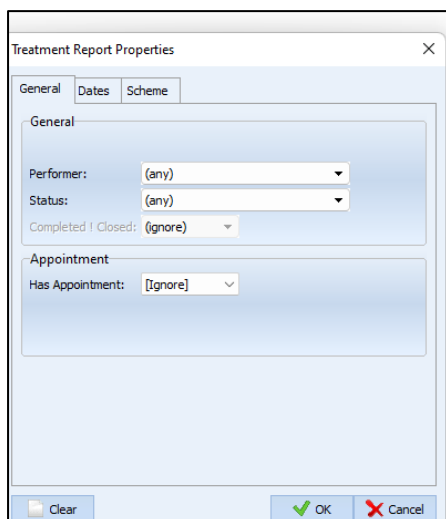
### Treatment forms

In SFD a report can be created to find Patients that have open treatment forms and no future appointment. You can filter this report to find courses of treatment whether they are open/closed or and whether those patients have an appointment booked in or not. The report can also be filtered by date range and scheme.

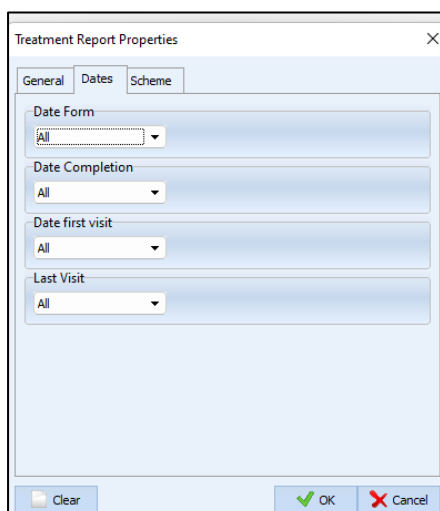
Select **Forms** from the **treatment section** in the report screen.



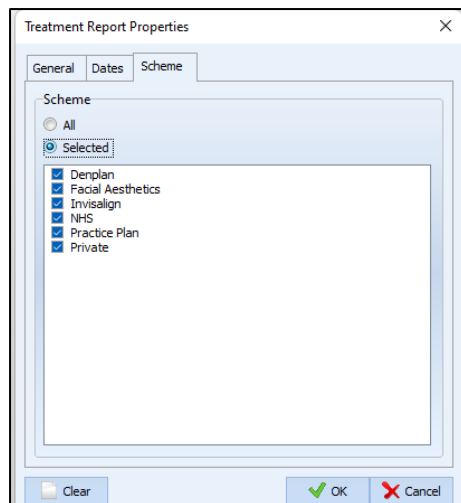
In the **general tab** select the performer, status of the treatment such as complete or incomplete. You can also select if the have an appointment of not.



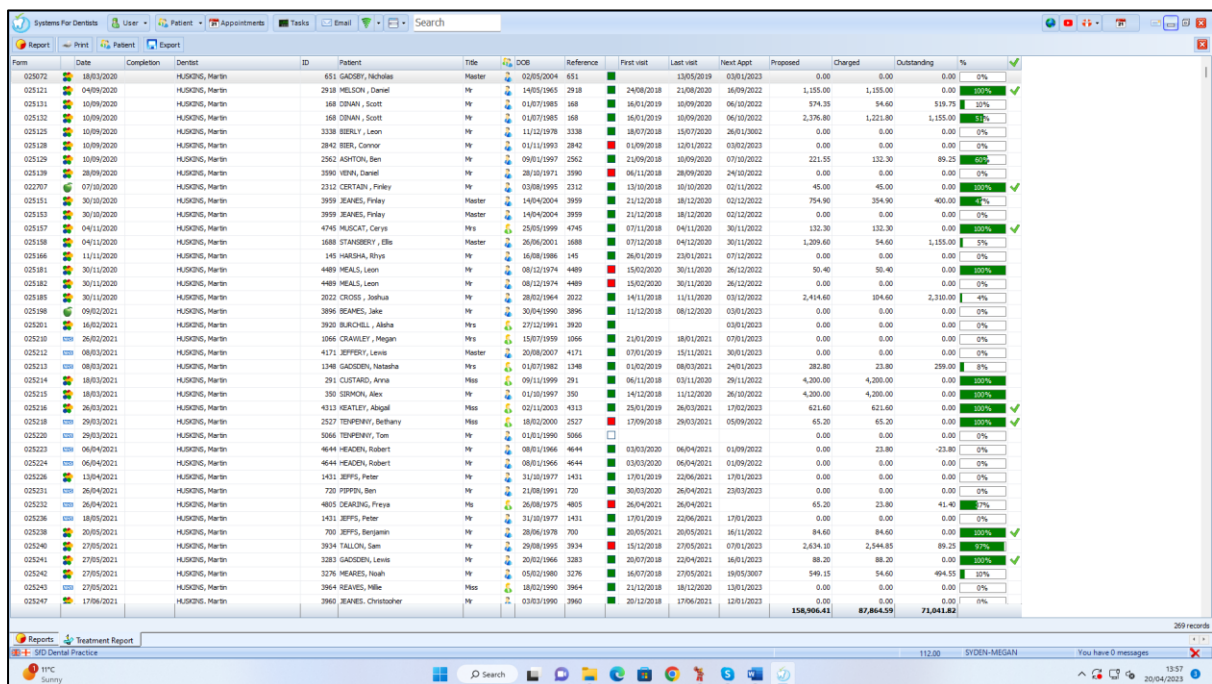
**Date range** can be selected from the dates tab.



Patient **scheme** can be selected from the Schemes tab.



The report will display the patients that meet the chosen criteria.



Form	Date	Completion	Dentist	ID	Patient	Title	DOB	Reference	First visit	Last visit	Next Appt	Proposed	Charged	Outstanding	%
025072	18/03/2020		H.S.K.D.S, Martin	651	GADSDY, Nicholas	Master	02/05/2004	651		13/05/2019	03/01/2023		0.00	0.00	0.00
025121	04/04/2020		H.S.K.D.S, Martin	2918	MELSON, Daniel	Mr	14/05/1965	2918		24/08/2018	21/08/2020	16/09/2022	1,155.00	1,155.00	100%
025131	10/09/2020		H.S.K.D.S, Martin	348	OWAN, Scott	Mr	01/07/1985	348		30/01/2019	10/09/2020	06/10/2022	974.28	94.60	918.75
025132	10/09/2020		H.S.K.D.S, Martin	348	OWAN, Scott	Mr	01/07/1985	348		30/01/2019	10/09/2020	06/10/2022	2,376.88	1,221.80	1,155.00
025125	10/09/2020		H.S.K.D.S, Martin	3338	BIRLEY, Leon	Mr	11/12/1978	3338		30/07/2018	15/07/2020	26/01/2022	0.00	0.00	0%
025128	10/09/2020		H.S.K.D.S, Martin	2842	BIRLEY, Connor	Mr	01/11/1993	2842		01/09/2018	12/01/2022	03/02/2023	0.00	0.00	0%
025129	10/09/2020		H.S.K.D.S, Martin	2562	ASHTON, Ben	Mr	09/01/1997	2562		21/09/2018	10/09/2020	07/10/2022	221.55	132.30	89.25
025139	28/06/2020		H.S.K.D.S, Martin	3590	VENH, Daniel	Mr	28/10/1971	3590		06/11/2018	28/09/2020	24/10/2022	0.00	0.00	0%
022707	07/10/2020		H.S.K.D.S, Martin	2312	CERTAIN, Finley	Mr	03/08/1995	2312		13/10/2018	10/10/2020	02/11/2022	45.00	45.00	100%
025131	30/10/2020		H.S.K.D.S, Martin	3959	JEANES, Finley	Master	14/04/2004	3959		21/12/2018	18/12/2020	02/12/2022	754.90	354.90	400.00
025137	30/10/2020		H.S.K.D.S, Martin	3959	JEANES, Finley	Master	14/04/2004	3959		21/12/2018	18/12/2020	02/12/2022	0.00	0.00	0%
025137	04/11/2020		H.S.K.D.S, Martin	4745	MUSCAT, Cyrus	Mrs	25/05/1999	4745		07/11/2018	04/11/2020	30/11/2022	132.30	132.30	100%
025138	04/11/2020		H.S.K.D.S, Martin	1688	STANGHERY, Ellis	Master	26/06/2001	1688		07/12/2018	04/12/2020	30/11/2022	1,209.60	54.60	1,155.00
025166	11/11/2020		H.S.K.D.S, Martin	145	HARGRAVE, Rhys	Mr	16/08/1986	145		26/01/2019	23/01/2021	07/12/2022	0.00	0.00	0%
025181	30/11/2020		H.S.K.D.S, Martin	4489	HEALS, Leon	Mr	08/12/1974	4489		15/02/2020	30/11/2020	26/12/2022	50.40	50.40	100%
025182	30/11/2020		H.S.K.D.S, Martin	4489	HEALS, Leon	Mr	08/12/1974	4489		15/02/2020	30/11/2020	26/12/2022	0.00	0.00	0%
025185	30/11/2020		H.S.K.D.S, Martin	2022	CROES, Joshua	Mr	28/02/1984	2022		14/11/2018	11/11/2020	03/12/2022	2,414.60	194.60	2,220.00
025198	26/02/2021		H.S.K.D.S, Martin	3956	SCARLES, Jake	Mr	30/04/1990	3956		11/12/2018	08/12/2020	03/01/2023	0.00	0.00	0%
025201	26/02/2021		H.S.K.D.S, Martin	3920	BURCHILL, Alpha	Mrs	27/12/1991	3920		03/01/2019	03/01/2023		0.00	0.00	0%
025210	26/02/2021		H.S.K.D.S, Martin	1066	CRANLEY, Megan	Mrs	15/07/1959	1066		21/01/2019	18/01/2021	07/01/2023	0.00	0.00	0%
025212	08/03/2021		H.S.K.D.S, Martin	4171	JEFFERY, Lewis	Master	20/08/2007	4171		07/01/2019	15/11/2021	30/01/2023	0.00	0.00	0%
025213	08/03/2021		H.S.K.D.S, Martin	1348	GADSDEN, Natasha	Mrs	01/07/1982	1348		01/02/2019	08/03/2021	24/01/2023	282.80	23.80	259.00
025214	18/03/2021		H.S.K.D.S, Martin	291	CUSTARD, Anna	Miss	09/11/1999	291		06/11/2018	03/11/2020	29/11/2022	4,200.00	4,200.00	100%
025215	18/03/2021		H.S.K.D.S, Martin	350	SIMMON, Alex	Mr	01/10/1997	350		14/12/2018	11/12/2020	26/10/2022	4,200.00	4,200.00	100%
025216	26/03/2021		H.S.K.D.S, Martin	4313	HEATLEY, Abigail	Miss	02/11/2003	4313		24/01/2019	26/03/2021	17/02/2023	621.60	621.60	100%
025218	26/03/2021		H.S.K.D.S, Martin	2527	TOWENBY, Delaney	Miss	18/02/2000	2527		17/09/2018	29/03/2021	09/09/2023	65.20	65.20	100%
025220	26/03/2021		H.S.K.D.S, Martin	5066	TOWENBY, Tom	Mr	01/01/1990	5066					0.00	0.00	0%
025223	06/04/2021		H.S.K.D.S, Martin	4644	HEADEN, Robert	Mr	08/01/1966	4644		03/03/2020	06/04/2021	01/09/2022	0.00	23.80	-23.80
025224	06/04/2021		H.S.K.D.S, Martin	4644	HEADEN, Robert	Mr	08/01/1966	4644		03/03/2020	06/04/2021	01/09/2022	0.00	0.00	0%
025226	13/04/2021		H.S.K.D.S, Martin	1431	JEFFS, Peter	Mr	31/10/1977	1431		17/01/2019	22/06/2021	17/01/2023	0.00	0.00	0%
025231	26/04/2021		H.S.K.D.S, Martin	720	PIPPIN, Ben	Mr	21/08/1991	720		30/03/2020	26/04/2021	23/03/2023	0.00	0.00	0%
025232	26/04/2021		H.S.K.D.S, Martin	4805	SCARLES, Freya	Ms	26/06/1975	4805		26/04/2021	26/04/2021		65.20	23.80	41.40
025236	18/05/2021		H.S.K.D.S, Martin	1431	JEFFS, Peter	Mr	31/10/1977	1431		17/01/2019	22/06/2021	17/01/2023	0.00	0.00	0%
025238	26/05/2021		H.S.K.D.S, Martin	700	JEFFS, Benjamin	Mr	28/06/1978	700		20/05/2021	20/05/2021	16/11/2022	84.60	84.60	100%
025240	27/05/2021		H.S.K.D.S, Martin	3934	TALLON, Sam	Mr	29/08/1995	3934		15/12/2018	27/05/2021	07/01/2023	2,634.10	2,544.85	89.25
025241	27/05/2021		H.S.K.D.S, Martin	3283	GADSDEN, Lewis	Mr	20/02/1966	3283		20/07/2018	22/04/2021	16/01/2023	88.20	88.20	100%
025242	27/05/2021		H.S.K.D.S, Martin	3276	HEARLES, Noah	Mr	05/02/1980	3276		16/07/2018	27/05/2021	19/05/2027	549.15	54.60	494.55
025243	27/05/2021		H.S.K.D.S, Martin	3964	JEANES, Mille	Miss	18/02/1990	3964		21/12/2018	18/12/2020	13/01/2023	0.00	0.00	0%
025247	17/06/2021		H.S.K.D.S, Martin	3960	JEANES, Christopher	Mr	03/03/1990	3960		20/12/2018	17/06/2021	12/01/2023	0.00	0.00	0%
													158,906.41	87,864.59	71,041.82

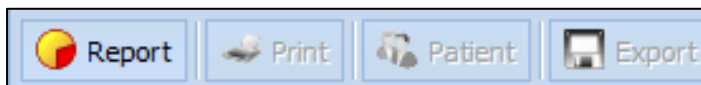
## Items

In SFD you can run a report to find out which treatment items have been proposed and whether they have been charged for or not. You are also able to see if performers are undercharging or over charging on items.

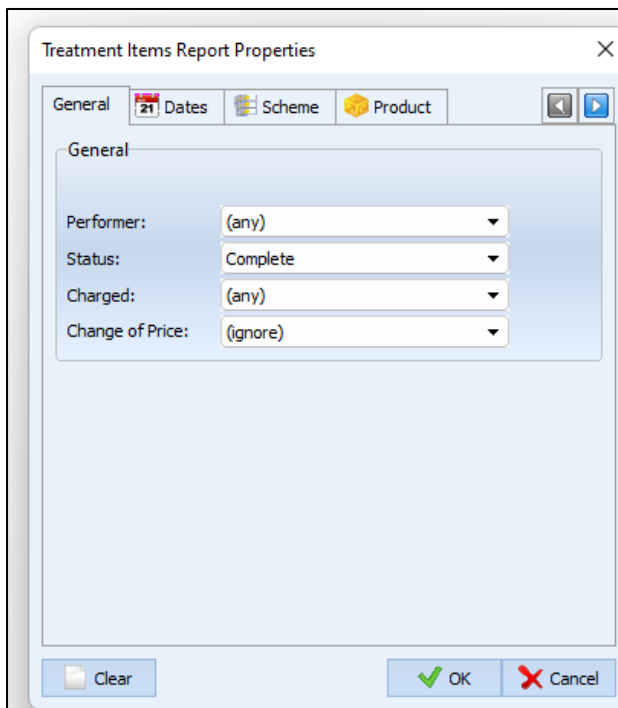
Select **items** from the **treatment section** of the report screen.



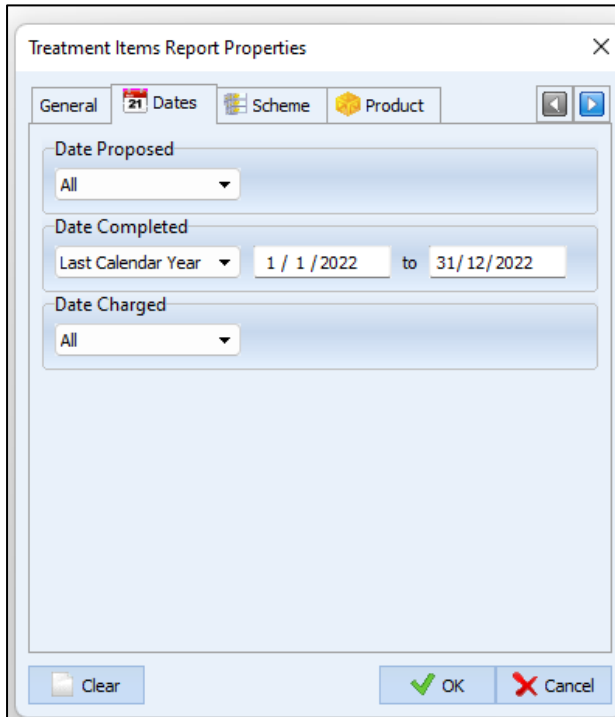
Select **report** to start the report generation.



In the **general tab** you can filter by individual performers or view all. **Status** can be set to complete or incomplete treatment. **Charged** can be set as charged or not charges. **Change of prices** can be set to look for whether process have been increased or decreased. Select your individual options from the drop down.

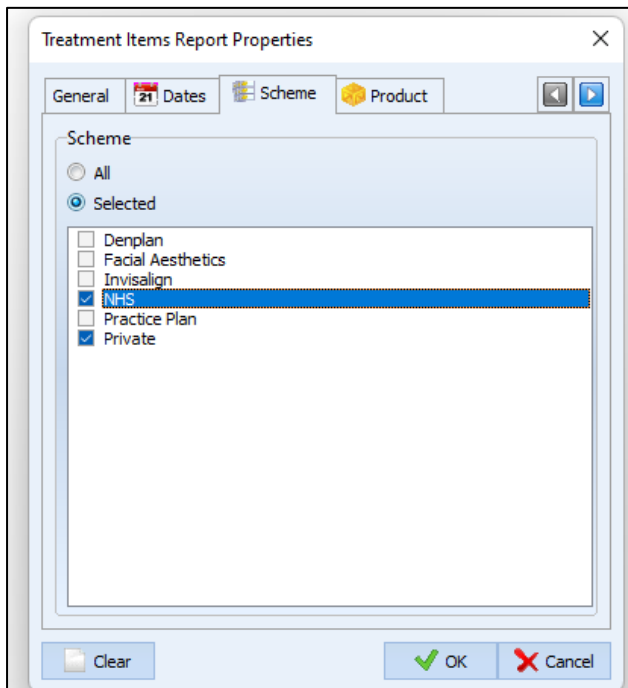


Once your requirements have been selected you can move to the **Dates** tab. From this tab you can chose the proposed dates of treatment, if the treatment has been completed within a certain time frame and whether or not a patient has been charged for the treatment items.



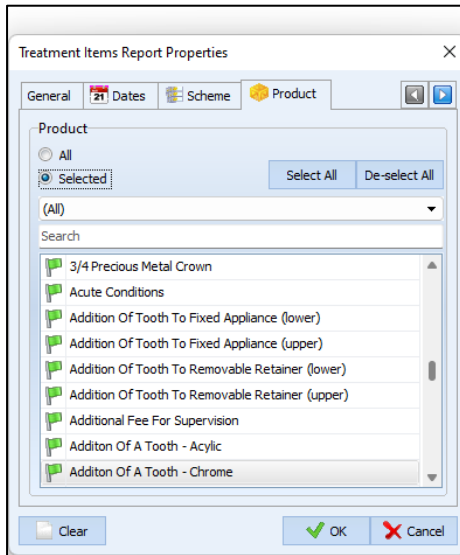
The screenshot shows the 'Treatment Items Report Properties' dialog box with the 'Dates' tab selected. The 'General' tab is also visible. The 'Dates' tab contains three sections: 'Date Proposed' with a dropdown menu set to 'All'; 'Date Completed' with a dropdown menu set to 'Last Calendar Year' and date fields showing '1 / 1 / 2022' to '31 / 12 / 2022'; and 'Date Charged' with a dropdown menu set to 'All'. At the bottom, there are 'Clear', 'OK', and 'Cancel' buttons.

In the **scheme** tab you can select what scheme the patients are on by checking the required boxes.

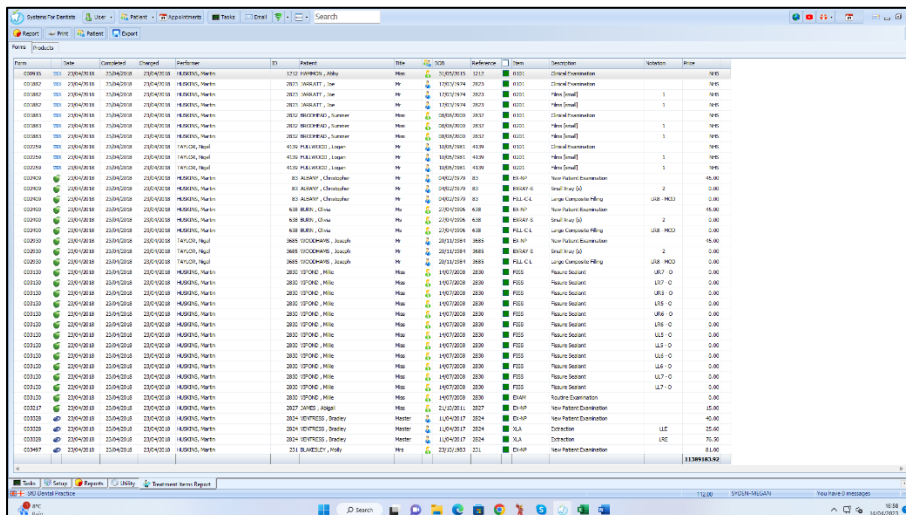


The screenshot shows the 'Treatment Items Report Properties' dialog box with the 'Scheme' tab selected. The 'General' and 'Dates' tabs are also visible. The 'Scheme' tab contains a section with two radio buttons: 'All' and 'Selected'. The 'Selected' radio button is selected. Below the radio buttons is a list of checkboxes: 'Denplan', 'Facial Aesthetics', 'Invisalign', 'NHS', 'Practice Plan', and 'Private'. The 'NHS' and 'Private' checkboxes are checked. At the bottom, there are 'Clear', 'OK', and 'Cancel' buttons.

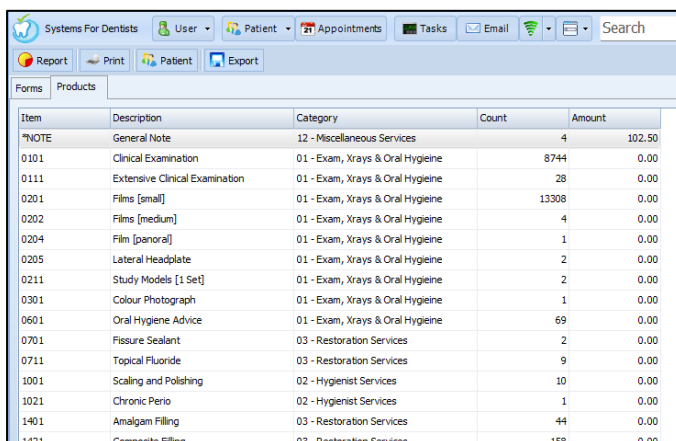
In the **product tab** you can narrow down the report even further by choosing specific treatment or selecting all.



The **forms tab** when selected will show treatment items that have been performed in that specific time period based on the date range that has been selected.



If you select the **product tab**. This will show number of items in products. This is how many times each product has been used with the selected time period.



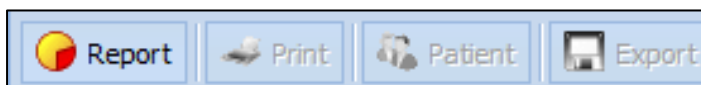
## NHS Reports (if applicable)

### UDA

If your practice provides NHS treatment then checking UDA/UAO's is an important KPI that a practice manager will need to keep an eye on. There are two reports which a practice will want to keep an eye on which includes the UDA report.



Select **report** to start the report generation.



You can then fill in the specific filters required such as contract and also date range.

Select Dates

×

Dates:

All

Contract:

NHS Contract

☐ Patients entered in this period

✓ OK

✗ Cancel

Once the report has run you will then be shown a UDA summary for that date range selected which will show all performers, the amount of UDA/UAO's processed through SFD and also the SDL which is the amount of UDA/UAO's that have been scheduled which reports back into the system from NHS compass.

Dates: 01/01/2023 to 21/04/2023

Records: 20

Performer: (all)

Totals

SummaryFormsNon-ScheduledOpen Courses

Month	Performer	UDA	UOA	SDL
01/2023	Total	8.00	44.00	0.00
01/2023	HUSKINS, Martin	8.00	44.00	0.00
02/2023	Total	7.00	27.00	0.00
02/2023	HUSKINS, Martin	7.00	27.00	0.00
03/2023	Total	17.00	0.00	0.00
03/2023	HUSKINS, Martin	17.00	0.00	0.00
04/2023	Total	15.00	23.00	0.00
04/2023	HUSKINS, Martin	15.00	23.00	0.00

Within the report there are different tabs available to find different bits of key information relating to the NHS claims.

Totals	Summary	Forms	Non-Scheduled	Open Courses
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The **Summary** tab gives the viewer an overview of which types of claims have been sent and what treatments have been claimed for.





The **Forms** tab will then give you a full list of all treatment forms created during the date range the report was ran for. This can be filtered based on performer and it will also give you information as to whether the treatment form has been scheduled or not.

Form /	Date	Completion	Performer	Patient	Charge	UDA	UOA	SDL	Date SDL
025642	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis	0.00		21.00		
025643	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis	0.00		0.00		
025644	23/01/2023	23/01/2023	HUSKINS, Martin	PRINGLE, William	65.20	3.00			

The **Non-Scheduled** shows a list of treatment forms which have been transmitted through SFD but at this point they have not been scheduled for payment. These are claims that the practice will want to keep an eye on.

Form /	Date	Completion	Performer	Patient	UDA	UOA
025642	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis		21.00
025643	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis		0.00
025644	23/01/2023	23/01/2023	HUSKINS, Martin	PRINGLE, William	3.00	

The last tab in this report is to show the user the **Open Courses** that have been created within the date range of the report. This report shows who the patient is and also the proposed and completed UDA activity of each form. You can also see if the patient has a future appointment booked as well if they show with a calendar in the last column of the report.

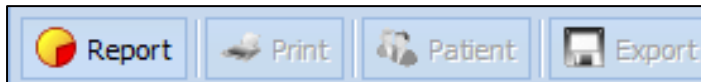
Form	Date		Performer	Patient	Completed	Proposed	
025646	25/01/2023		HUSKINS, Martin	MALBROUGH , Sophie	0.00	0.00	
025648	26/01/2023		HUSKINS, Martin	KINDRED , Joe	0.00	0.00	
025653	01/02/2023		HUSKINS, Martin	GILBERT, Archie	1.00	1.00	
025660	10/02/2023		HUSKINS, Martin	THACKSTON, Francesca	1.00	1.00	

## UDA Summary

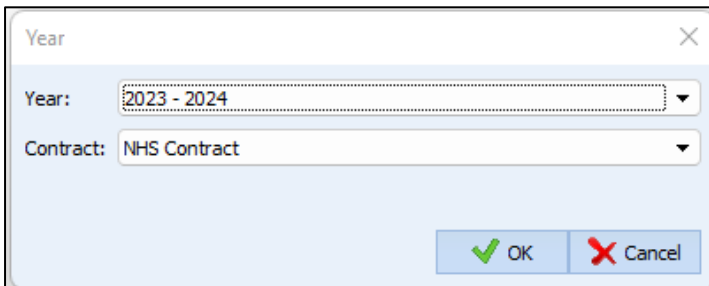
The UDA Summary report is very similar to the UDA report but this report can be run for the contract year only.



Select **report** to start the report generation.



You can then select which contract to report on and also which contract year.



Year

Year: 2023 - 2024

Contract: NHS Contract

OK Cancel

Once the report has completed processing you will then get a summary of the contract per month.

Month Total	Week Total	Summary	Forms	Non-Scheduled	Open Courses	By Category	Removed From Schedule Report	
Year					2022/2023			
Performer Name					(all)			
Month	UDA	SDA	Target	%	UOA	SOA	Target	%
April	18.00	0.00	0.00	7.83	50.00	0.00	0.00	14.84
May	42.00	0.00	0.00	18.26	65.00	0.00	0.00	19.29
June	6.00	0.00	0.00	2.61	21.00	0.00	0.00	6.23
July	18.00	0.00	0.00	7.83	0.00	0.00	0.00	0.00
August	31.00	0.00	0.00	13.48	0.00	0.00	0.00	0.00
September	50.00	0.00	0.00	21.74	44.00	0.00	0.00	13.06
October	24.00	0.00	0.00	10.43	21.00	0.00	0.00	6.23
November	9.00	0.00	0.00	3.91	0.00	0.00	0.00	0.00
December	0.00	0.00	0.00	0.00	65.00	0.00	0.00	19.29
January	8.00	0.00	0.00	3.48	44.00	0.00	0.00	13.06
February	7.00	0.00	0.00	3.04	27.00	0.00	0.00	8.01
March	17.00	0.00	0.00	7.39	0.00	0.00	0.00	0.00
Total	230.00	0.00	0.00		337.00	0.00	0.00	

This will show the amount of UDA/UOA's claimed through SFD during this contract year and also the SDA/SOA (Scheduled) received for those claims. This will also show how the practice has performed against targets which can be set for the practice and also the individual dentists. This report can also be filtered based on performer so you can focus on particular dentists' performance.

The UDA summary report includes some of the same tabs which are in the UDA report so you can find out the same information but as an overall of the contract year selected. There are some additional tabs however for further breakdowns such as **Week Total** and also the ability to filter claims based on treatment types etc in **By Category**.