Systems for Dentists

KPI Reports for Practice Managers Guide to SFD

Contents

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.
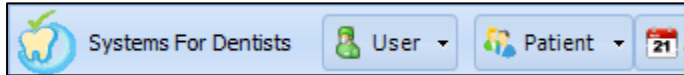
The Reports menu will appear which is spilt into different reporting sections.
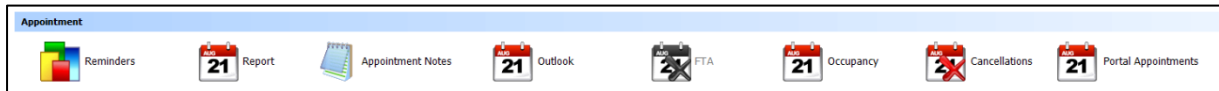
![Systems for Dentists logo]
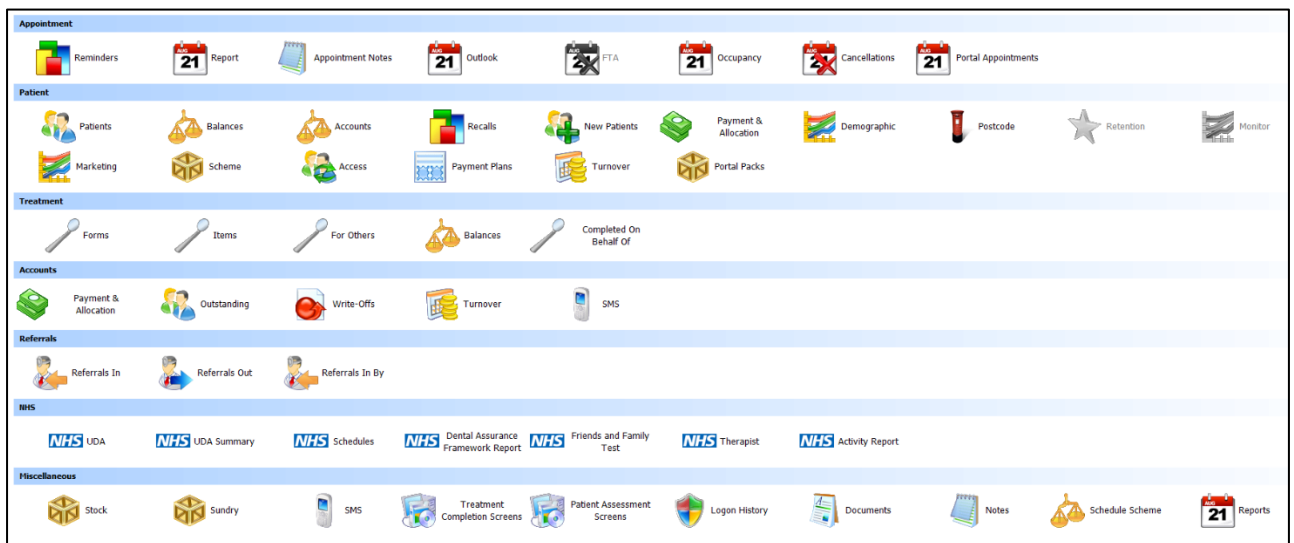
Appointment Reports

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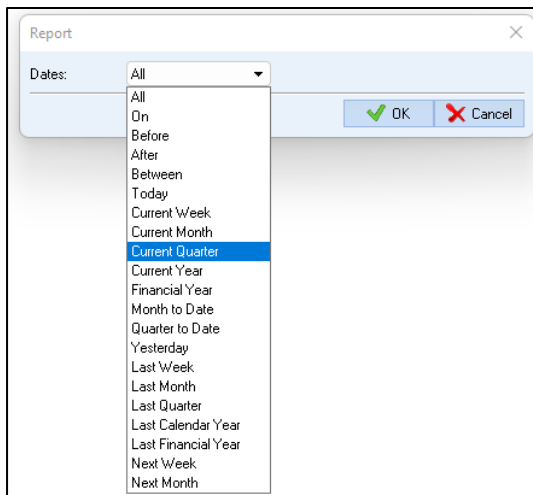
Report

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%.

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,

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.
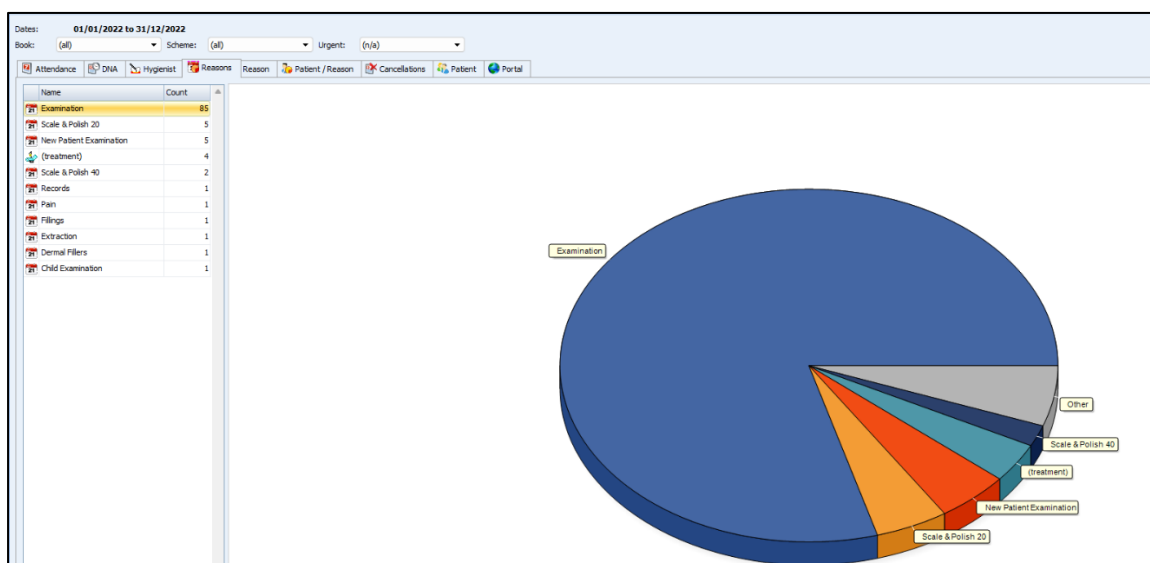

The reasons tab will show a pie chart with the various reasons for appointments. The report can be filtered by book, scheme and urgency. **NB: this report is useful for an overview and help to target marketing campaigns.**

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.

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

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

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.

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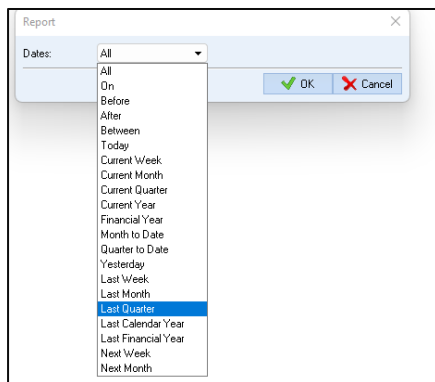
NB: As a practice manager you are looking for over 90% occupancy rate with a top target of 98%.
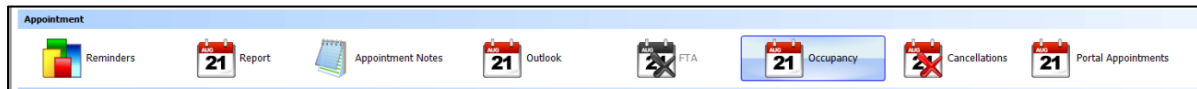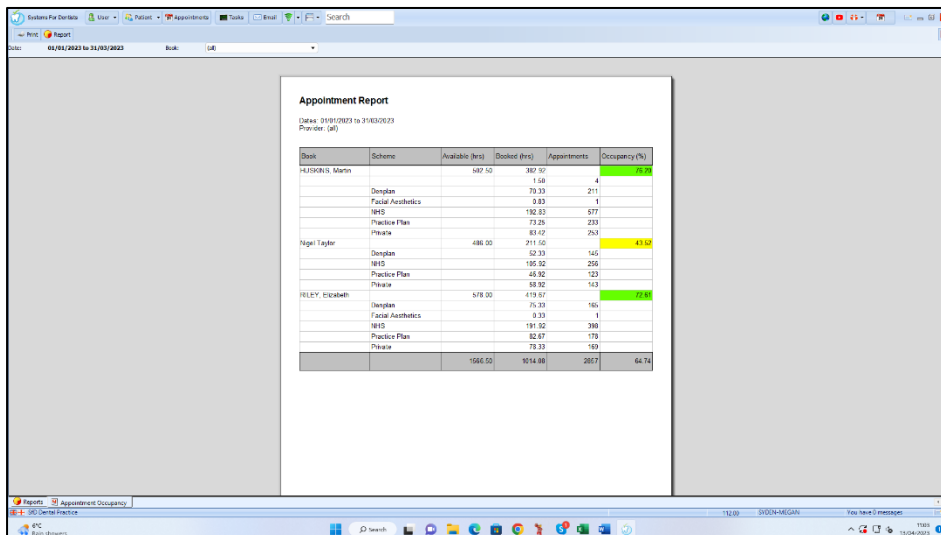

Select **report**

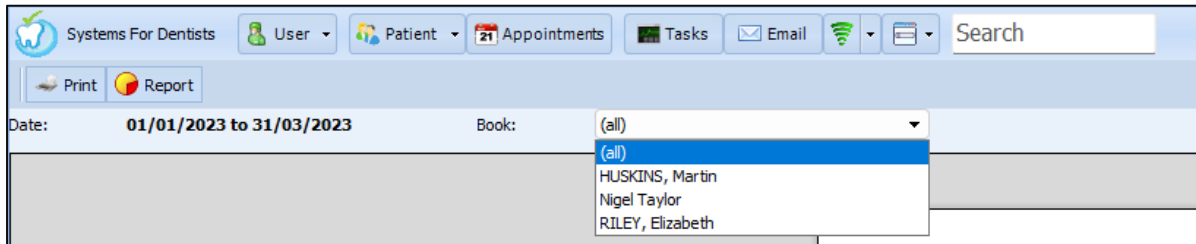Select your required **date range** from the drop down.

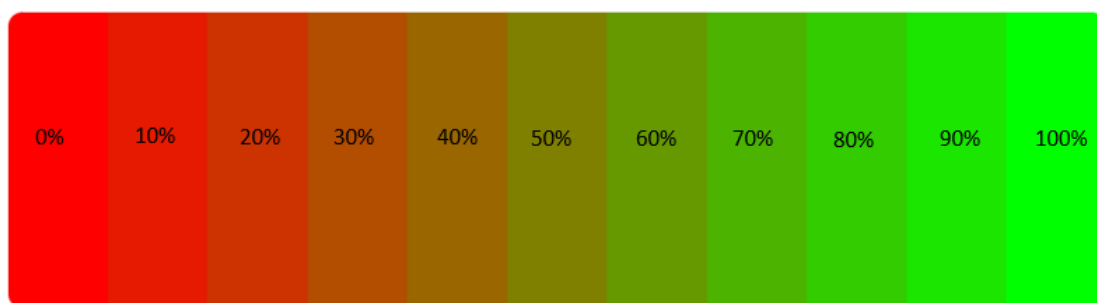The report will appear, which can be printed as a hard copy or printed to PDF and saved as a document.

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

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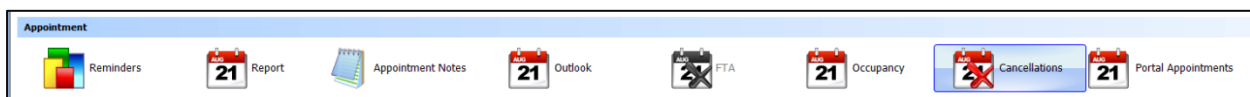
The colour scheme on the Occupancy report changes in 10% increments. From 0 to 100%
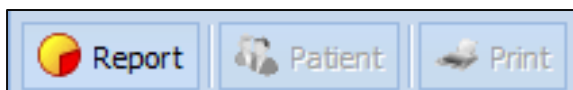

Cancellation Report

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.**
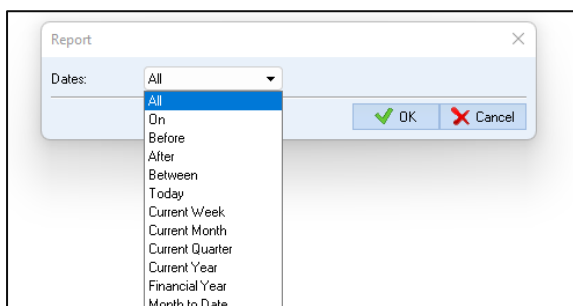
Select **report** to generate the report.
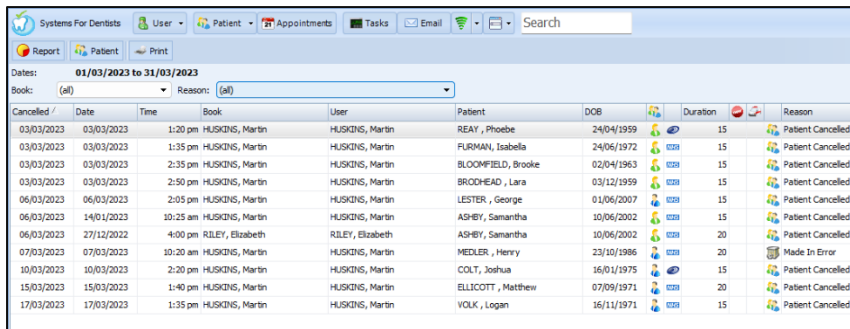
Select the date range from the drop-down options.
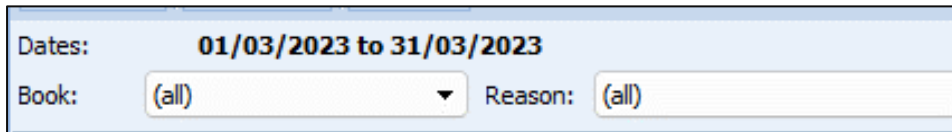
The report will show a list of all cancelled appointments with reasons for the cancellation.

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

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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)
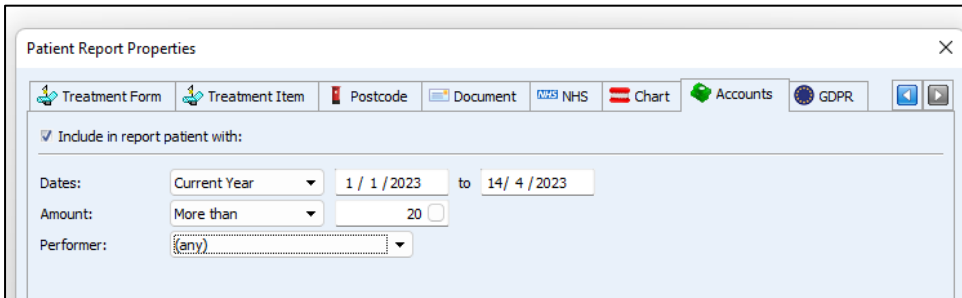
Select **Patient** from the **Patient section** in the report menu.
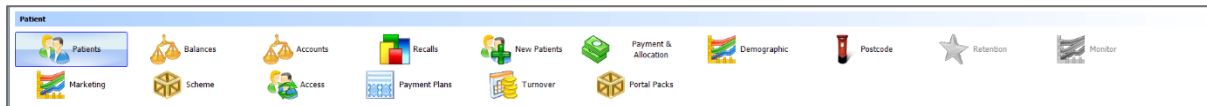
Select **new**
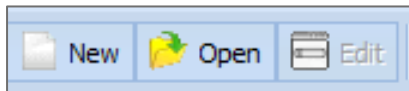
Scroll along the tab using the arrows until you see the **accounts** tab.
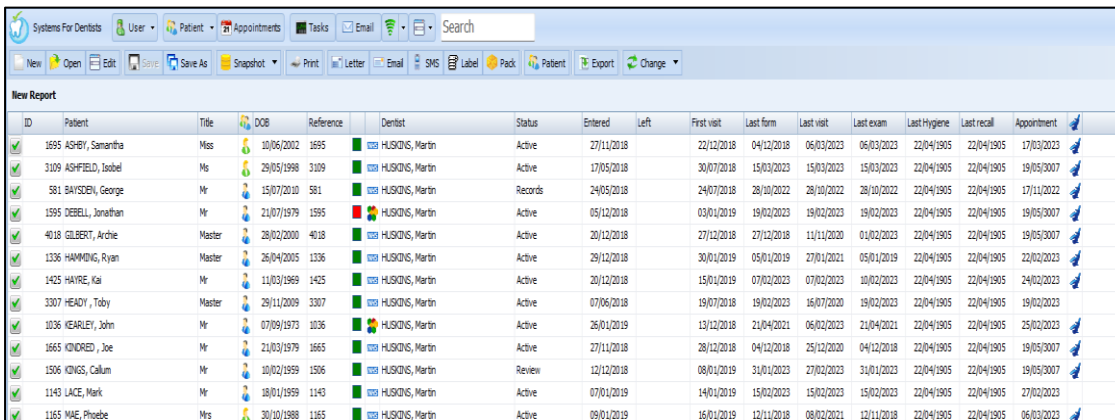
Tick the box to **include in report**.

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.

Balance Report (Bad Debt)

If SFD you can generate a report to show any patient with a debit account (Patients with outstanding balances).
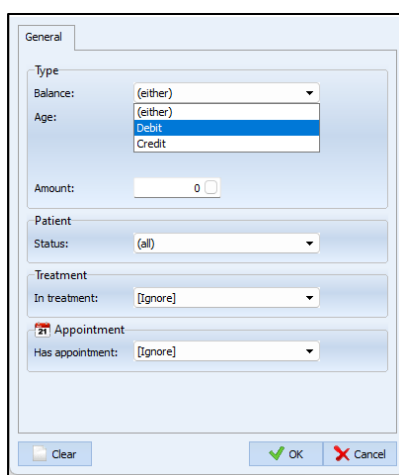
In the reports menu select **Balance** from the **Patient** section.
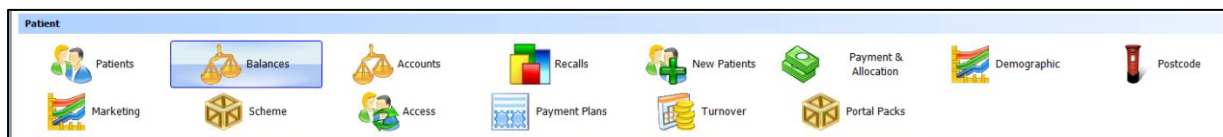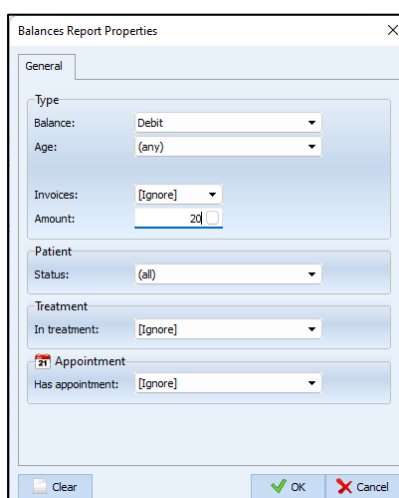
Select **Report**
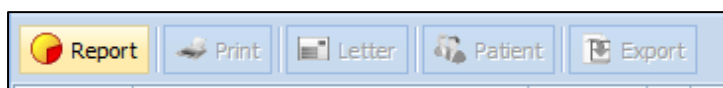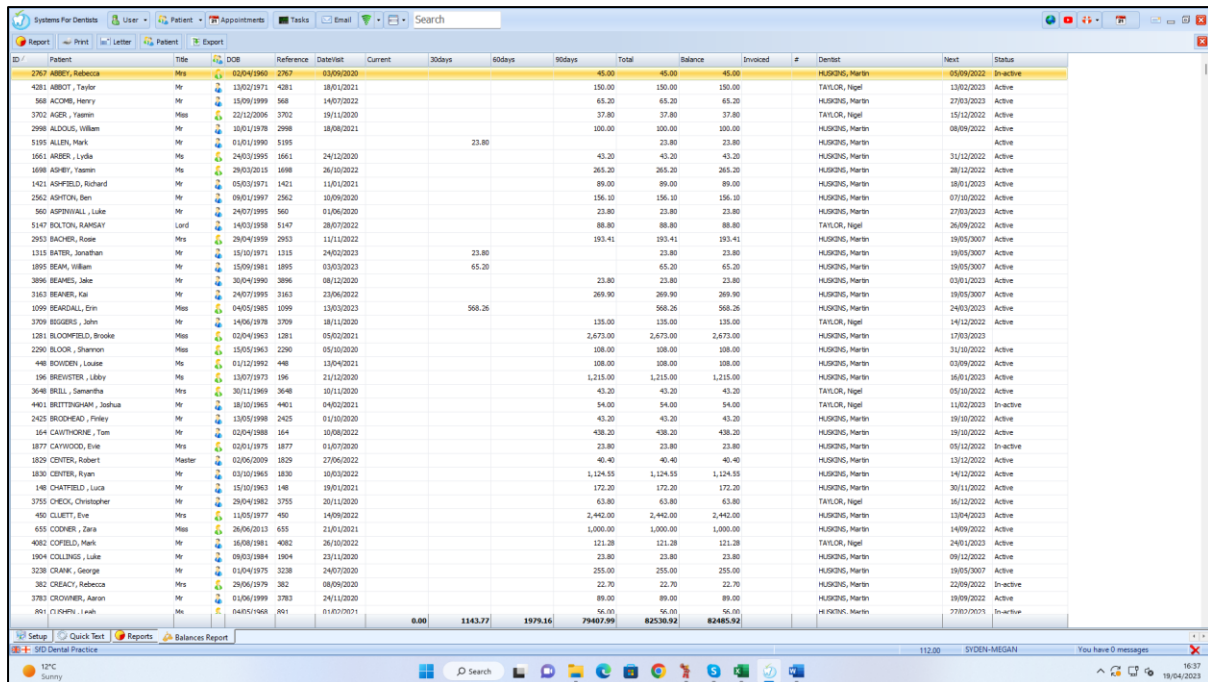
Select Balance type from the drop-down option. If you are looking for patients with a Debit balance, select debit from this list.

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.

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.
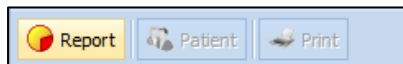
Select **Report**

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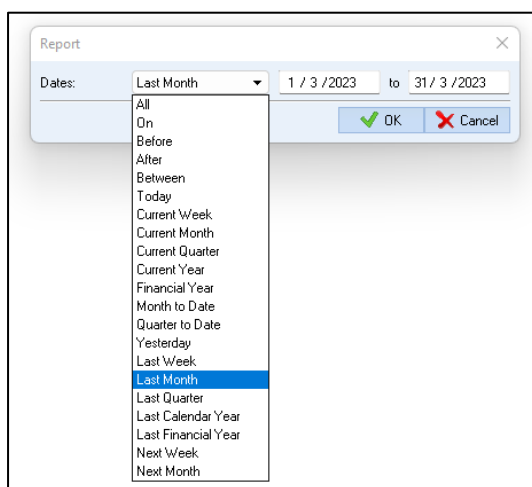
The report will appear showing the patients that have paid for treatment in that date range. The report can also be filtered by performer and scheme type.

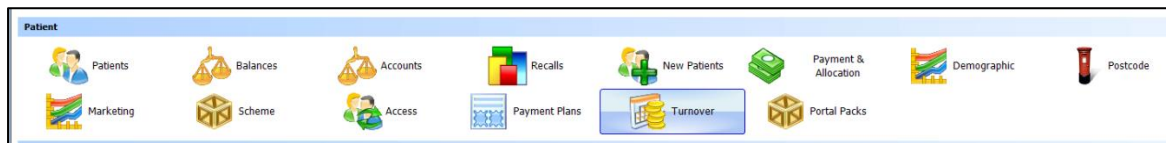| Date	Performer	Scheme	Patient	Item	Description	Amount
03/03/2023	HUSKINS, Martin	NHS	BEAM, William			65.20
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	EX&SP	Exam and Scale & Polish With	78.54
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	XRAY-S	Small Xray (s)	18.48
03/03/2023	HUSKINS, Martin	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 Acylic 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.
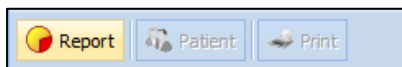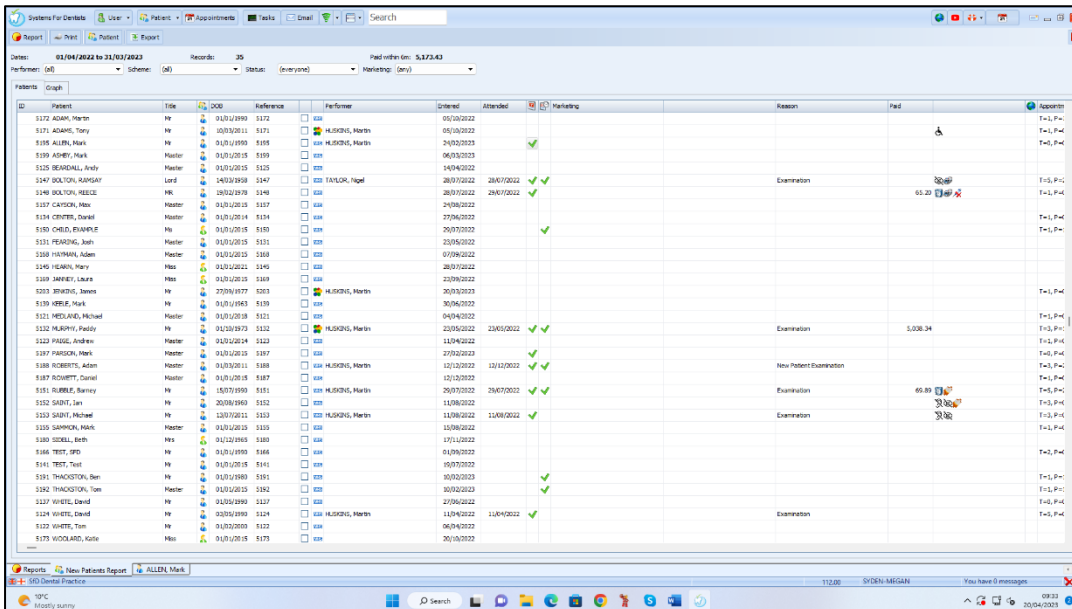
Select report

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

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

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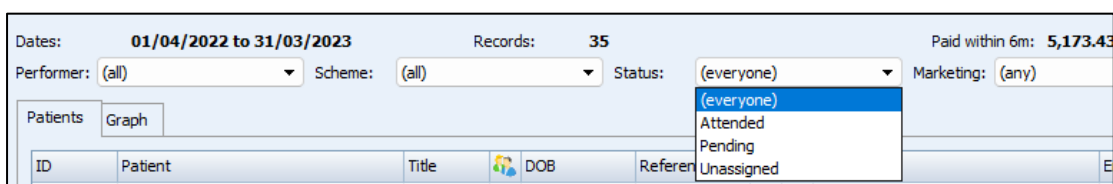
Accounts Report

### *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.
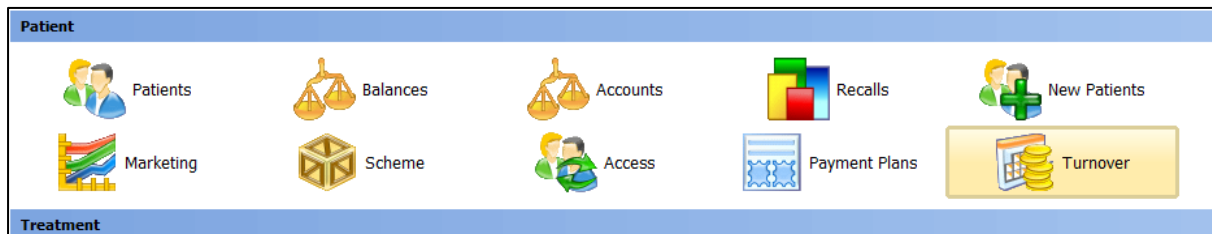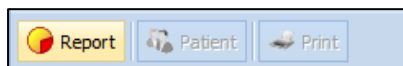
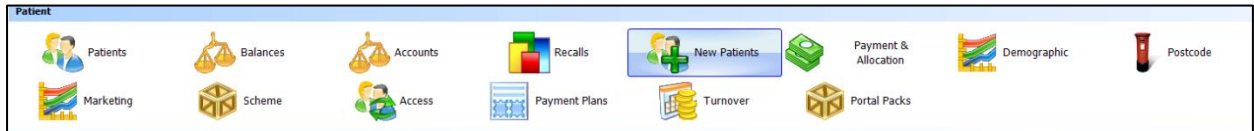Select **Report**

Select the **date range** from the drop-down list.
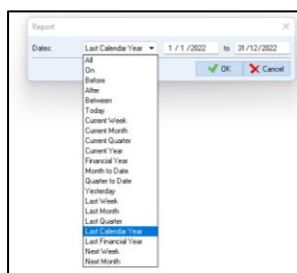
The report will show the **turnover for the selected date range**. The report can be filtered by performer.

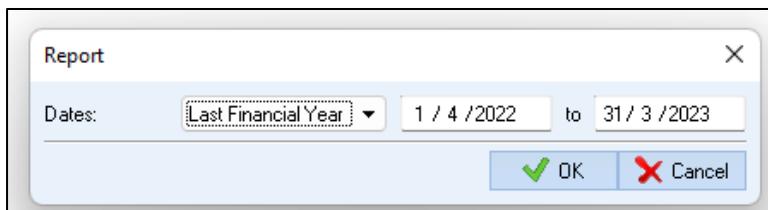| Date	Performer		Scheme	Patient	Item	Description	Amount
09/10/2023	Practice		Un-assigned	KEMPE, Phoebe	INT02	TePe Brushes - Orange	3.60
09/10/2023	HUSKINS, Martin	NHS		KEMPE, Phoebe			306.80
09/10/2023	HUSKINS, Martin	NHS		LEEKE, Charlie			25.80
11/10/2023	HUSKINS, Martin	NHS		GILLIAM, Daisy			306.80
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	SMITHE, 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

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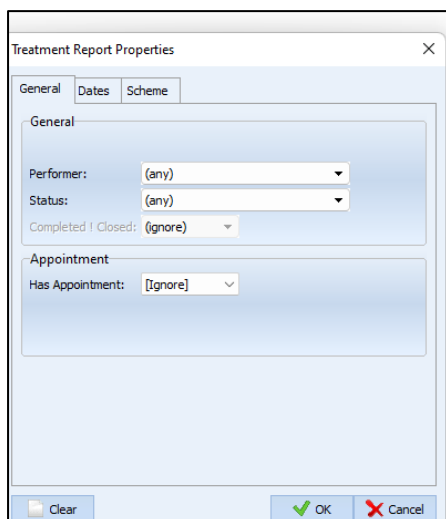
Treatment Reports

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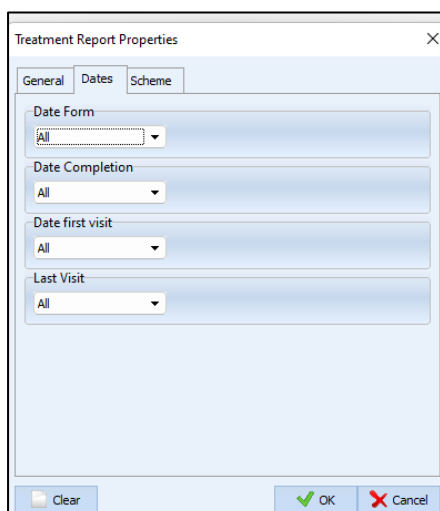
Select **Forms** from the **treatment section** in the report screen.

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.
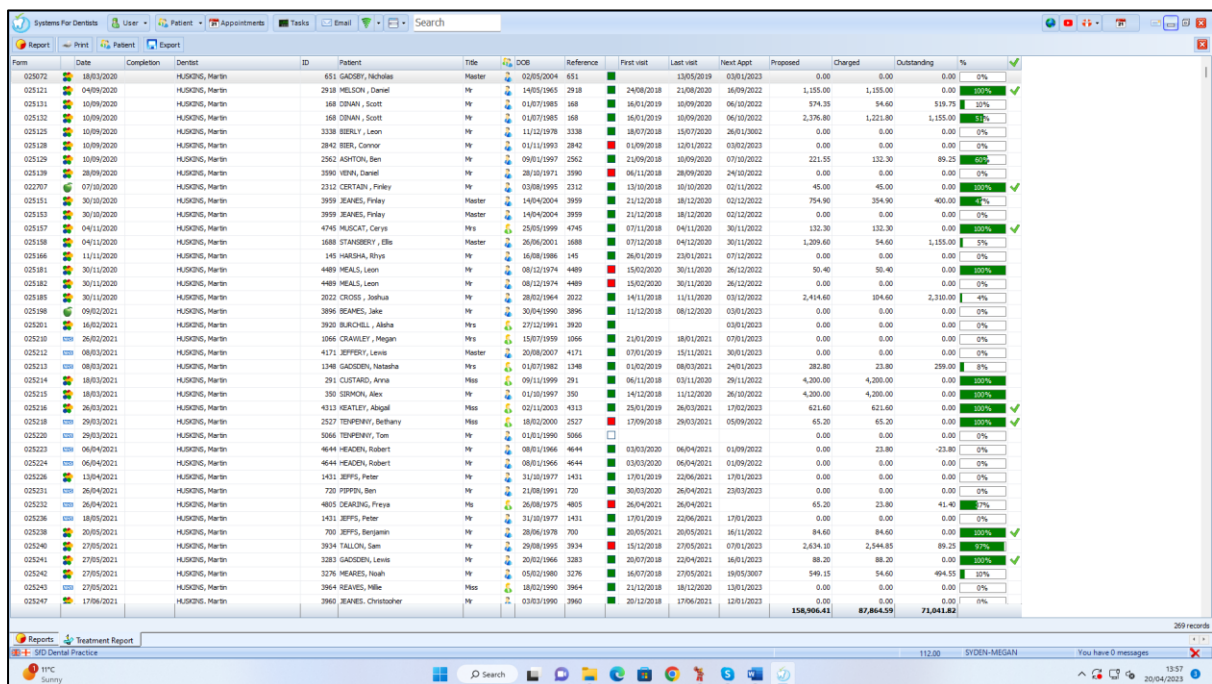
Date range can be selected from the dates tab.

Patient **scheme** can be selected from the Schemes tab.
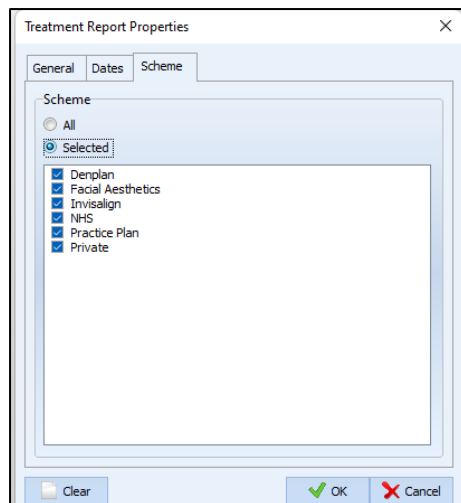
The report will display the patients that meet the chosen criteria.

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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.
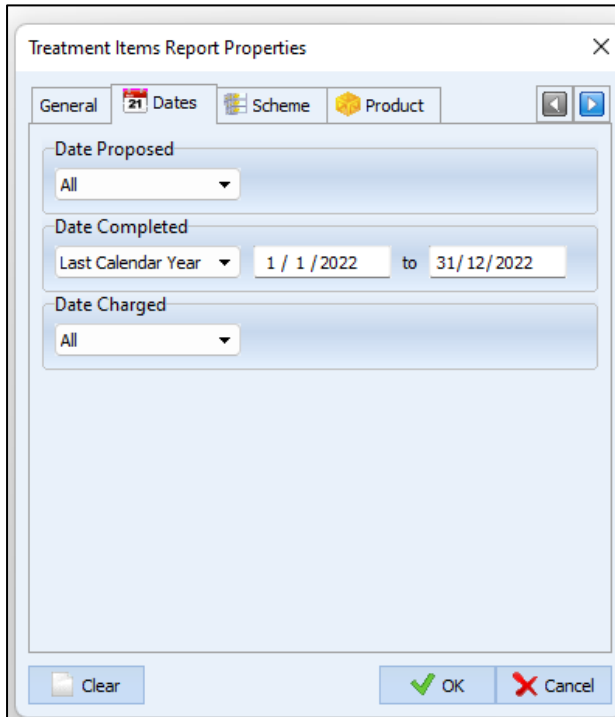
Select **report** to start the report generation.
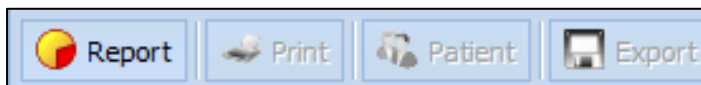
In the **general tab** you can filter by individual performers or view all. **Status** can be set to complete or incomplete treatment. **Charged** can be set as charged or not charges. **Change of prices** can be set to look for whether process have been increased or decreased. Select your individual options from the drop down.
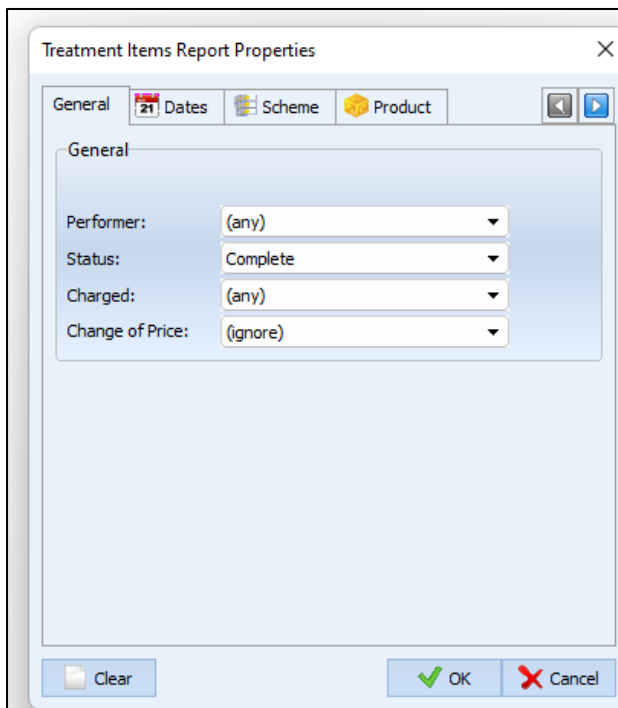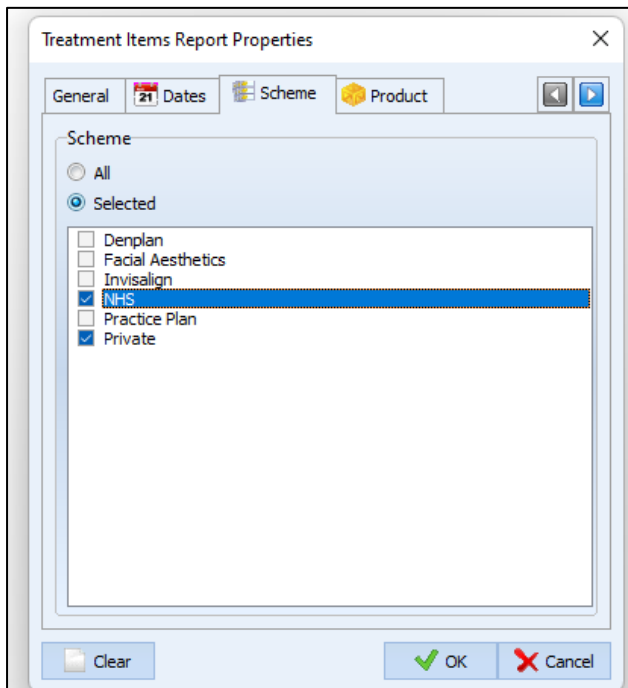
Once your requirements have been selected you can move to the **Dates** tab. From this tab you can chose the proposed dates of treatment, if the treatment has been completed within a certain time frame and whether or not a patient has been charged for the treatment items.
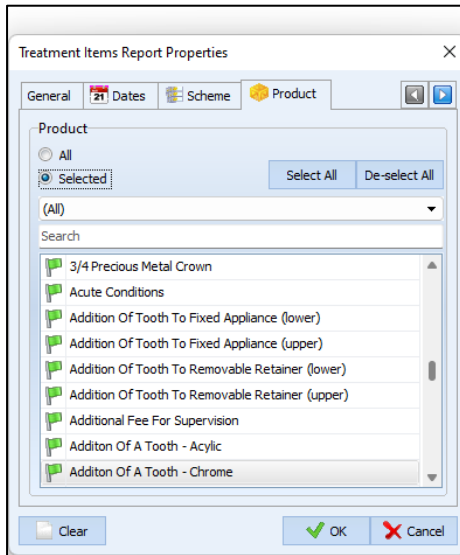
In the **scheme** tab you can select what scheme the patients are on by checking the required boxes.
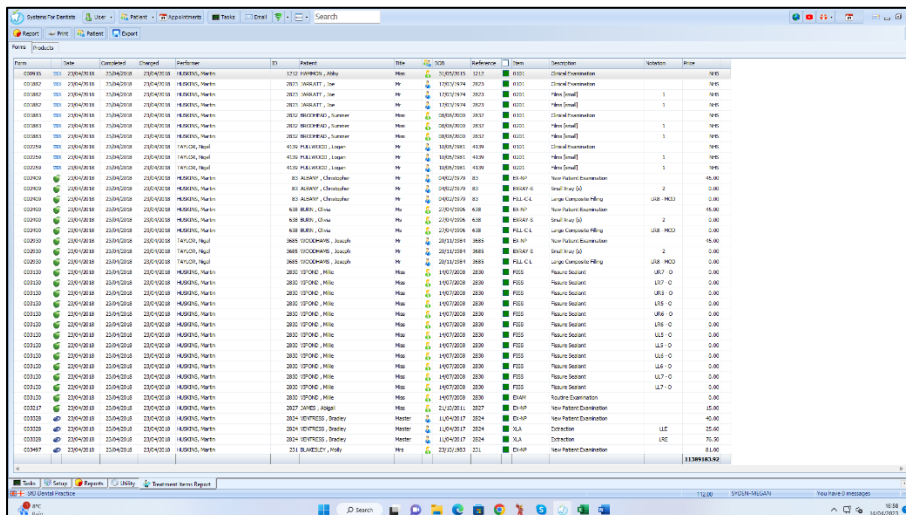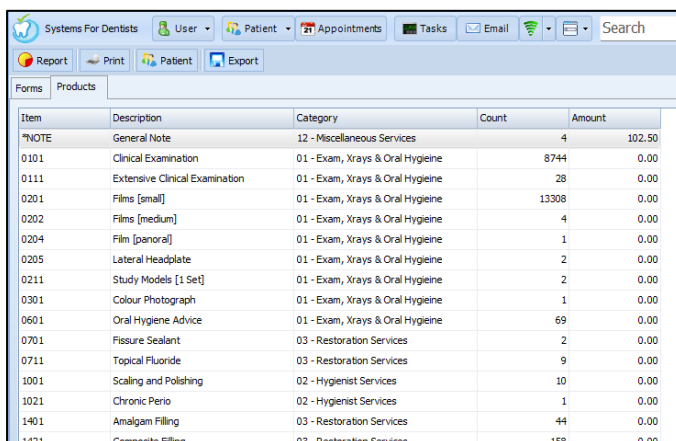
In the **product tab** you can narrow down the report even further by choosing specific treatment or selecting all.

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.

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NHS Reports (if applicable)

UDA

If your practice provides NHS treatment then checking UDA/UOA'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.
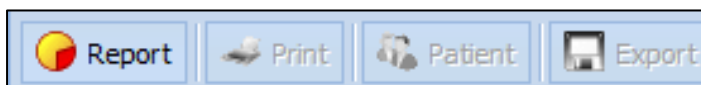
You can then fill in the specific filters required such as contract and also date range.

Once the report has run you when then be shown a UDA summary for that date range selected which will show all performers, the amount of UDA/UOA's processed through SFD and also the SDL which is the amount of UDA/UOA'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 | Summary | Forms | Non-Scheduled | Open 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

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.

NHS UDA Summary

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

[Report] [Print] [Patient] [Export]
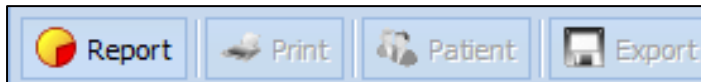
You can then select which contract to report on and also which contract year.

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 |

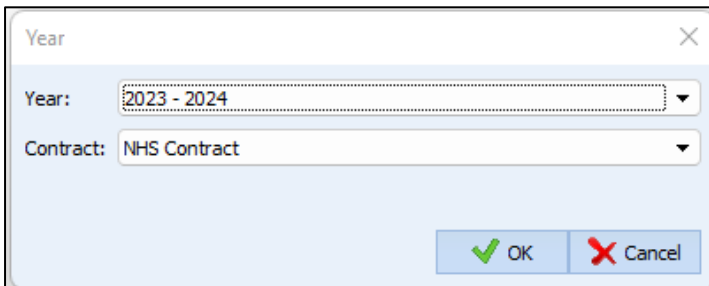| Year Performer Name				2022/2023 (all)			
Month	UDA	SDA	Target	%	UOA	SOA	Target	%
April	18.00	0.00	0.00	7.83	50.00	0.00	0.00	14.84
May	42.00	0.00	0.00	18.26	65.00	0.00	0.00	19.29
June	6.00	0.00	0.00	2.61	21.00	0.00	0.00	6.23
July	18.00	0.00	0.00	7.83	0.00	0.00	0.00	0.00
August	31.00	0.00	0.00	13.48	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**.