

Financial Analytics (PA): Appointment Analysis

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This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

Version 21.3

Path: Tools tab > Reporting button > Financial Analytics > Appointment Analytics

When to Use this Report

Use this dashboard to quickly view monthly recaps of appointment statuses. For example, how many were kept, cancelled, completed, etc. for the month of June compared to July. You can see total appointment count, high patient volume trends throughout the day, and appointments cancelled within 1 day of their appointment.

Qualifications/Best Practices

For the **Cancelled Appointments within 1 Day** tile, your practice must document cancellations when they occur in order to get accurate data - if you mark appointments as cancelled the next day, even when they were cancelled the day of, those will not pull into the report.

About Appointment Analytics

Filters

You can filter this report by **Location** and/or by **Provider** by selecting from the drop-downs. Each tile is defaulted to show the last six months. You can click the filter icon  within each tile to filter differently.

Appointment Analytics Dashboards Overview

Monthly Summary

Type of report: Summary Detailed Report

Displays: Quick glance at month over month total appointments and their various statuses, for the last six months.

Details:

- Grouped by Month and Appointment Status: In the top half of the report, the data is displayed for Total Visits and Appointment Status per month.
- Summary: In the Summary section, the Totals are shown for all months and Visit Types included in the filtered report.

Monthly Summary

Last 6 Months

Appointment Date	Total Visits	Completed	Completed %	Cancelled	Cancelled %	Cancelled Same Day	Cancelled Same Day %	No Show	No Show %	Kept/No Charges	Kept
May 2024	50	2	4%	0	0%	0	0%	0	0%	46	
April 2024	263	2	1%	7	3%	0	0%	8	3%	226	
March 2024	117	9	8%	12	10%	0	0%	1	1%	92	
February 2024	29	0	0%	2	7%	0	0%	0	0%	25	
January 2024	21	0	0%	0	0%	0	0%	0	0%	21	
December 2023	25	0	0%	2	8%	0	0%	0	0%	21	

SUMMARY	505	13	23	0	9	431	0	29
6 rows - 24 columns	No. of Visit	# of Completed	# of Cancelled	# of Cancelled Same Day	# of No Show	# of Kept/No Charges	# of Ready to Bill	# of Superbill Exists

Appointment Count

Type of report: Bar-graph

Displays: Visual representation of the month over month appointments and their various statuses.

Details:

- Total Visit(s): The number of total visits for that month appear on the top of each bar. Hover over the colors in each bar to see the number of visits per the associated status.
- Appointment Date (Month)

Number of Appointments by day of the week

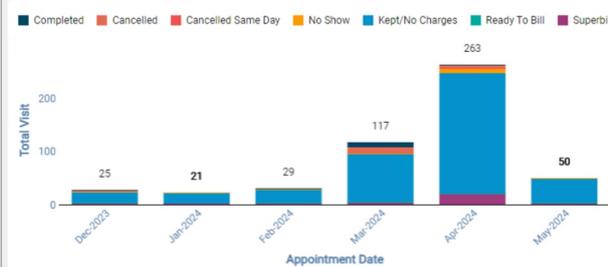
Type of report: Line Chart

Displays: Quick glance at week day patient volumes to see higher patient population days.

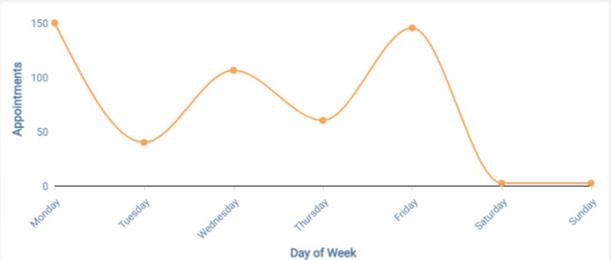
Details:

- Appointments: The number of appointments.
- Day of the Week: The day of the week.
- Note that this collates data for the last x months.

Appointment Count



Number of Appointments by day of the week



Number of Appointments by Hour

Type of report: Bar-graph

Displays: Quick glance at daily patient volume based on check-in time.

Details:

- Appointments: The total number of appointments throughout that hour.
- Hour Check in Time: The appointment is counted for the hour in which the check in occurred.

Number of Appointments by Hour



Appointment Count by Type of Appointments

Type of report: Pie Chart

Displays: High level look at appointment type volume.

Details: Hover over each slice of the pie chart to see more details. The percentage of the total for that visit type is calculated.

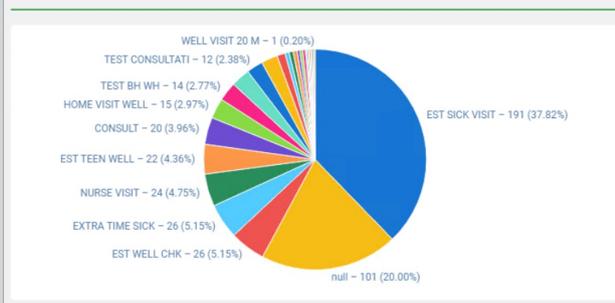
Cancelled Appointments within 1 Day

Type of report: Donut Chart

Displays: Amount of appointments cancelled/no showed within 24 hours of their appointment.

Criteria: Pulls all appointments with a status of Cancelled, Cancelled Same Day, or No Show that have an Exit Time within 24 hours of the appointment time.

Appointment Count by Type of Appointments



Cancelled Appointments within 1 Day



Location Summary

Type of report: Bar-graph

Displays: Quick glance at appointment statuses based on locations.

(1): Shows the division of appointment statuses for each location.

(2): Shows the summary of the total number of appointments and appointment status for all locations.

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Location	Total Visits	Completed	Completed %	Cancelled	Cancelled %	Cancelled Same Day	Cancelled Same Day %	No Show	No Show %	Kept/No Charges
Alpha	4	0	0%	0	0%	0	0%	0	0%	4
Anon Peds	13	0	0%	2	15%	0	0%	0	0%	11
Main Office	115	6	5%	12	10%	0	0%	0	0%	95
Main Office - Horsham Pediatrics	59	1	2%	1	2%	0	0%	0	0%	50
Satellite Location	314	6	2%	8	3%	0	0%	9	3%	271

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SUMMARY	505	13	23	0	9	431	0	29
5 rows - 24 columns	No. of Visit	# of Completed	# of Cancelled	# of Cancelled Same Day	# of No Show	# of Kept/No Charges	# of Ready to Bill	# of Superbill Exists