THE **BRIDGE** NETWORK
Intelligent software concepts.

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Tracker Metrics
Using Key Performance Indicators for Management

## What Are Metrics and How Can They Help You?

In order to make business decisions, you need to track certain Key Performance Indicators (KPIs). Metrics allows you to visualize many KPIs while comparing them to forecasted as well as past performance.

- Set Goals
- Track performance
- Run Metrics. Where do you stand in terms of goals? Use grids to identify opportunities.
- Make Adjustments.
- 'Rinse and Repeat'.

With traditional reporting, the collection of KPIs to compare over several periods can be cumbersome, and results are difficult to visualize. Once Metrics are configured, you can get your KPIs graphed along with underlying data to find opportunities.

The mere act of measuring performance has been shown to improve performance. Imagine what you can do when you take it to the next level.
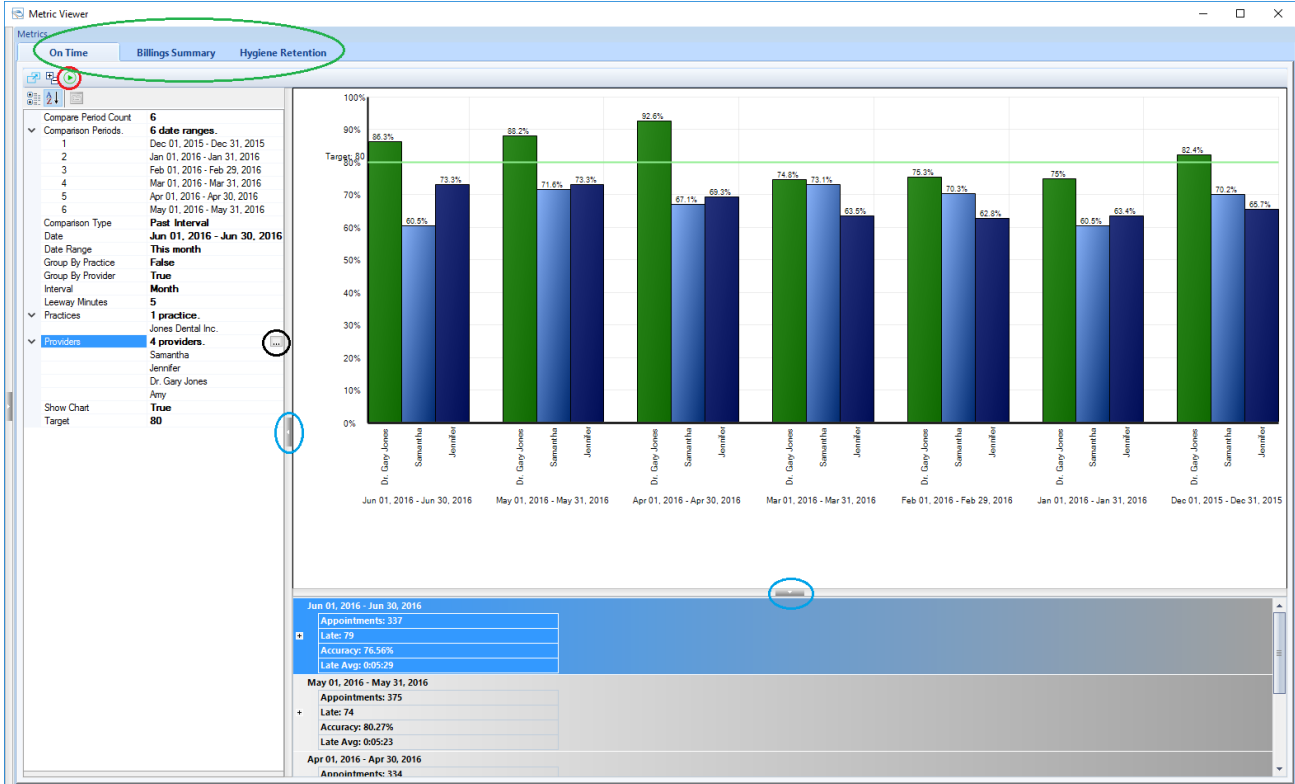
Running Metrics
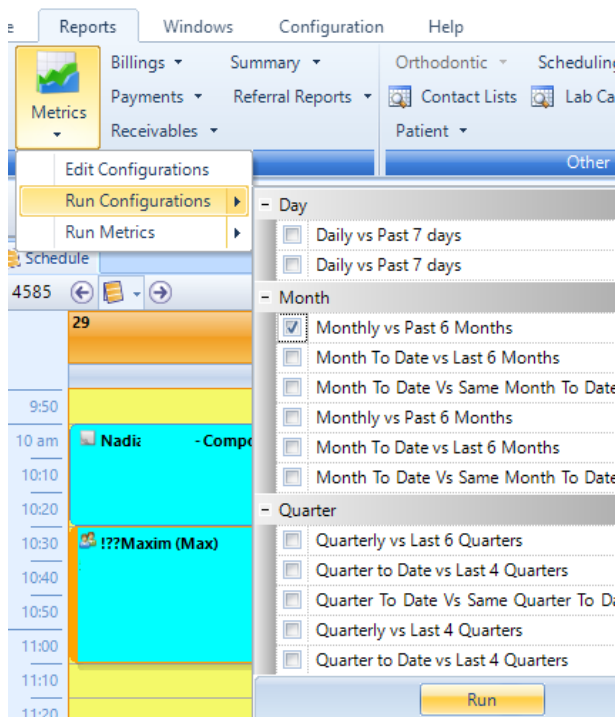
To run your metrics, click on Reports | Metrics | Run Configurations. Select the configurations you wish to run and then click Run.

If you wish to run a single Performance indicator (such as On Time), click Reports | Metrics | Run Metrics, then select the desired metric and click Run.

The results window will appear:

Click on the above image to view a larger version online.

The Metrics viewer has a tab at the top for each metric (top left, circled in green).

The left side contains all the parameters for the selected metric. They can be changed by selecting that parameter and clicking on the ellipsis button (circled in black). To refresh the schedule, then click the play button (top left circled in red).

The bottom of the viewer contains the grid, where the underlying data is shown. This is a very important section. For example, in the OnTime Metric, all the appointments for the period are shown, and any exceptions (late appointments in this case) are highlighted in red. Where the graphs paint the bigger picture, the grids are your way of drilling down to the details in order to find opportunities for improvement.

Note   Double Clicking on an area in the graph will bring you to the data in the grid corresponding to the graph area. This allows you to easily find the underlying data for any data point.

Sections can be enlarged by dragging their frames. Sections can be hidden and unhidden by clicking on the arrow buttons (circled in blue).

Key Performance Indicators (KPIs)

Below is a list of the KPIs available in Tracker Metrics along with a description of the parameter which are unique to those KPIS

On Time

On Time measures the percentage of patients who are seated within x number of minutes of their scheduled appointment start time. X is defined by the 'Leeway Minutes' parameter. A patient is considered on time if they are marked as 'In Chair' within their leeway time. Patients who arrive late (and therefore checked in late) get x minutes from their checkin time before they are marked as late.

Hygiene Retention

The percentage of recall appointments that had a future recall appointment booked on the same day. This metric will display the % of booked, pending as well as booked + pending appointments.

Patient Growth

Displays the number of patients added and inactivated, as well as the net result during each period. Inactivated patients show in the grid along with their reason for being inactivated, allowing you to find lost opportunities.

Booked Treatment Plans

Displays a percentage of active treatment plans created within the period that have a booked appointment associated with them.

Billings Summary

Summarizes the billings per period expressed as total billings, average per patient and average per hour.

Hygiene Production

Shows total production, dentist production, hygiene production expressed as a total as well as percentage of total.

Available Hours

Available Hours is expressed as a percentage of the scheduled hours for each provider. For example, if a provider was scheduled for 8 hours on a given day, Available hours will indicate what percentage of those 8 hours were filled with appointments. The appointments are grouped by status so that you can distinguish between Booked, Short Cancel, Personal and No Shows. A percentage for each status is provided, along with a combined total. Available Hours gives you a snapshot of your scheduling efficiency while accounting for all the nuances.

Configuring Metrics

Click Reports | Metrics | Edit Configurations to open the Metrics configuration screen. Tracker comes pre-loaded with the following configurations. You can modify these configurations as well as create new once from scratch:

Comparing Consecutive Periods

- **Daily vs Past 7 Days**: Shows today's metrics up against the previous 7 days.
- **Monthly vs Past 7 Months**: Shows this month's metrics up against the previous 7 months
- **Month To Date vs Last 6 Months**: Shows this month to date vs the previous 7 months to date. So if today is Feb 18th, it will show Feb 1 to Feb 18th as the current month, and compare it to Jan 1 to Jan 18, Dec 1 to Dec 18, Nov 1 to Nov 18, Oct 1 to Oct 18, Sept 1 to Sept 18, Aug 1 to Aug 18.
- **Quarterly vs Last 4 Quarters**: Compares the current quarter to the previous 6 quarters

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Comparing Same Period

- **Month to Date Vs Same Month To Date Last 4 Years**: Compares current Month to date to the previous 4 years of the same Month to date. So it compares current MTD of Feb 1 to Feb 18 2016, to Feb 1 to Feb 18, 2015, Feb1 to Feb 18, 2014, Feb 1 to Feb 18 2013, Feb 1 to feb 18, 2012.

- **Quarter to Date Vs Same Quarter To Date last 4 Years**. Compares the current year's quarter to date to the same Quarter to date in previous Years. So for example Jan 1 to feb 18 2016 vs, Jan 1 to Feb 18 2015 vs Jan 1 to Feb 18 2014 and so on.

Editing Metrics Parameters

To change the parameters, first select a configuration under the 'Description' column at left, then at the lower right click 'Edit' to change the parameters for that metric. In the following example we will edit the 'On Time' metric (pictured below)

As you select any parameter, an explanation shows at the bottom. A more detailed explanation can be found here.

Compare Period Count: The number of previous periods, in addition to the current period, to be included.

Comparison Type: Past Interval will compare the last 7 days (because compare period count is 7).

Parent interval is relative. If the Interval is Day, it will compare the same day for the past 7 weeks. If the Interval is Month, it will compare the same month over the past 7 years. If Interval is Quarter, it will compare the same quarter over the past 7 years.

Date Range: Defines the current period that comparisons are run against.
Leeway Minutes. This is unique to the On Time KPI. Set to 5 in this example, which means any patient not seated within 5 minutes of their appointment start time is considered late.

Run: Allows you to include or exclude the KPI from the configuration.

Show Chart. Determines whether a chart is generated or not.
Target: In this example is set to 80%. This will generate a target line on the graphic to allow you to visualize when the target is achieved

Practice and Provider Grouping

The main metrics configuration screen allows you to control which providers and practices to include and how to group them. By default, all active providers are selected and Grouping is turned on. Grouping by provider gives you separate values for each provider selected. Not grouping by providers will aggregate all the selected providers into a single value. Practice grouping works in the same way.