Practice management operational report – quick reference guide

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This quick reference "cheat sheet" summarises key features of the **practice management operational reporting dashboard** and accompanies the video: "Practice management operational reporting."

For help, contact Practice Systems Support: practice.support@pinnacle.health.nz

A comprehensive user guide is also available for those who want a bit more detail.

Access to this dashboard

You'll find this report under the **network performance dashboard**, beneath the main network performance options.

Dashboard overview

Section	What you'll see	Key actions
About this report	Definitions, purpose, and data caveats	Read before using the report
Enrolments and capitation	Patients enrolled/capitated for current and prior months	Drill to NHI, export to Excel
Monthly enrolment changes	Net change and reasons for patients exiting	Filter by reason (e.g. deceased)
Actions required	Patients turning 16, B-code expiries, or overdue enrolments	Drill to NHI, use focus mode
Community Services Card	Cardholders by demographic, with expiry date filters	Filter and review PMS accuracy
High user health card	Current holders and potential qualifiers (12+ visits)	Prompt review for eligibility
Practitioner demographics	Patients per GP by age, gender, ethnicity, deprivation	Identify data gaps or anomalies
Immunisation eligibility	Patients approaching age 45 or 65 (e.g. for Shingrix)	Prepare follow-up for due patients

Use this dashboard to:

- monitor month-to-month enrolments and capitation
- identify missing or mismatched data
- take proactive steps with expiring enrolments or cardholders
- prepare patients for upcoming immunisation milestones
- drill to NHI-level data and export for action.