

Practice management trends reporting – user guide

March 2025

This user guide accompanies the video “Practice management trends reporting” and supports the use of the new dashboard designed for longer-term insights into capitation, clawbacks, patient turnover, ED visits, and ASH admissions.

The dashboard complements the operational report by helping you identify key financial and patient flow patterns over time.

We hope this guide and the video help make your practice management easier and more informed.

Access and permissions

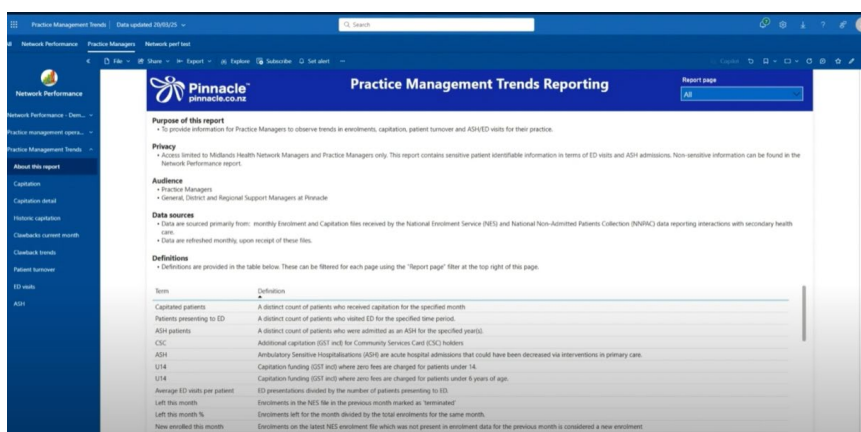
The practice management trends reporting dashboard contains financial information and is only available to staff who currently receive the Finance Capitation Remittance Advice.

- If you believe you should have access but don't, please contact [Practice Systems Support](#) or your district development manager.
- Do not share your login credentials – doing so gives others access to sensitive financial information.

For access queries or support: practice.support@pinnacle.health.nz

About this report

This section outlines definitions, data sources, and important context for interpreting the data. It's the best place to start if you're unsure about what something means.



Term	Definition
Capitated patients	A distinct count of patients who received capitation for the specified month.
Patients presenting to ED	A distinct count of patients who visited ED for the specified time period.
ASH patients	A distinct count of patients who were admitted as an ASH for the specified year(s).
CSC	Additional capitation (CST incl) for Community Services Care (CSC) holders.
ASH	Arbitrary Serious Hospitalisations (ASH) are acute hospital admissions that could have been decreased via interventions in primary care.
U14	Capitation funding (CST incl) where zero fees are charged for patients under 14.
U14	Capitation funding (CST incl) where zero fees are charged for patients under 14 years of age.
Average ED visits per patient	ED presentations divided by the number of patients presenting to ED.
Left this month	Encounters in the NES file in the previous month marked as 'terminated'.
Left this month %	Encounters left for the month divided by the total encounters for the same month.
New enrolled this month	Encounters on the latest NES enrollment file which was not present in enrollment data for the previous month is considered a new enrollment.

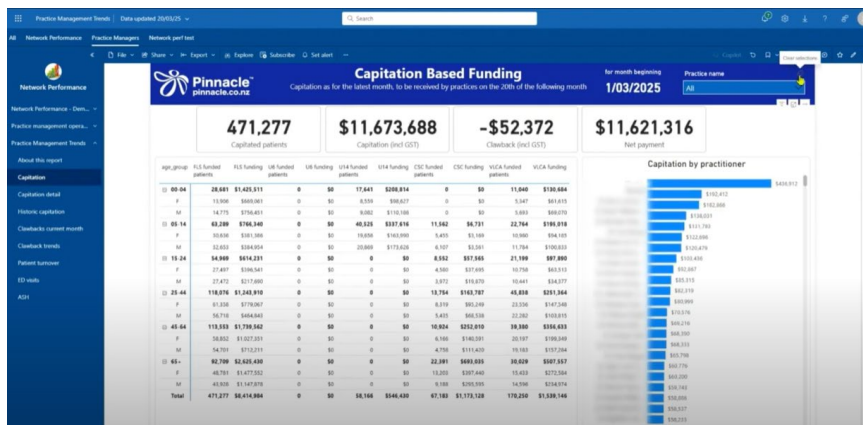
Capitation overview

Displays capitation for the most recent month, including:

- total capitated patients
- capitation funding
- clawback/offset amounts (for patients seen elsewhere)
- net payment to the practice (usually paid on the 20th of each month).

Breakdowns include:

- funding category
- practitioner
- age group
- gender.



Capitation detail and filters

You can view detailed breakdowns by:

- funding category
- age group
- gender
- ethnicity.

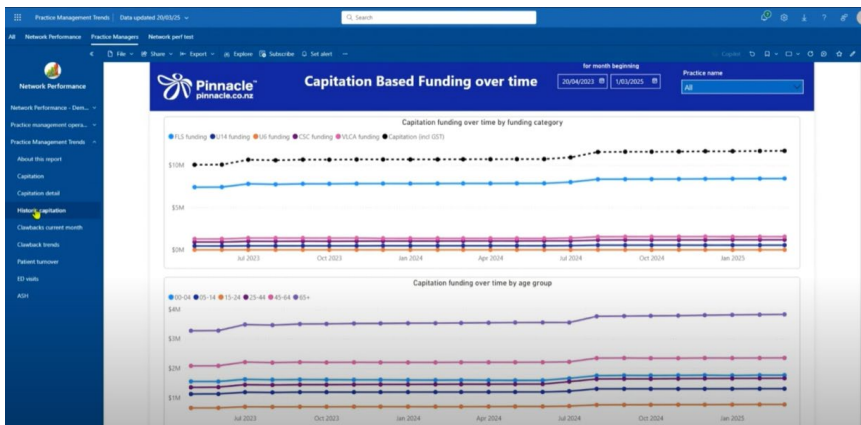
Use the filter pane on the right to adjust by region or provider. Click on any chart (e.g. “Māori” in ethnicity) to cross-filter other visuals.

Historic capitation

Shows funding trends over time by:

- funding category
- age group

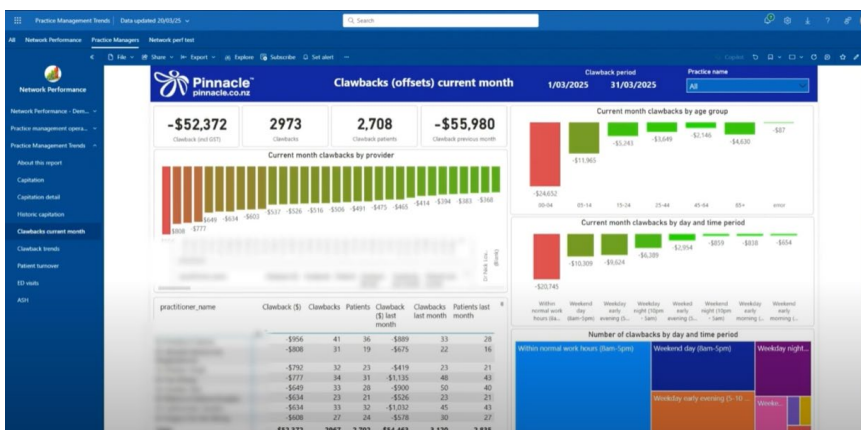
Use the date range selector to focus on recent years or specific timeframes.



Clawbacks (offset payments)

Displays current month data:

- number of patients affected
- clawback amount by practitioner
- comparison to previous month
- clawbacks by time of day (e.g. normal hours, evenings, weekends).

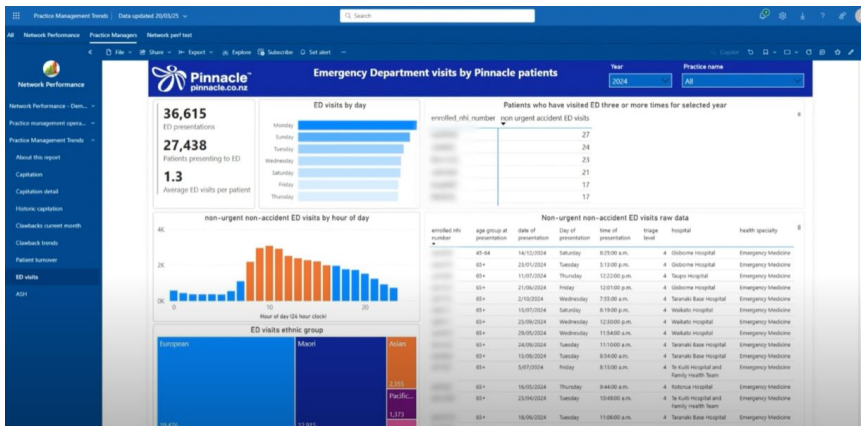


Clawback trends

Shows historical trends:

- current vs previous month

- details of each visit
- whether visits occurred during normal hours.



ASH admissions (restricted access)

Displays avoidable hospital admissions by:

- number of admissions
- average nights in hospital
- individual conditions (e.g. heart disease)

NHI-level data is available for follow-up and care planning.

