Practice management operational report – user guide

March 2025

This guide goes with the video "Practice management operational reporting" and walks you through the dashboard step by step. This report is designed for practice managers and includes detailed enrolment and capitation information that updates each month. Unlike the trends report, this one allows you to drill down to NHI-level detail.

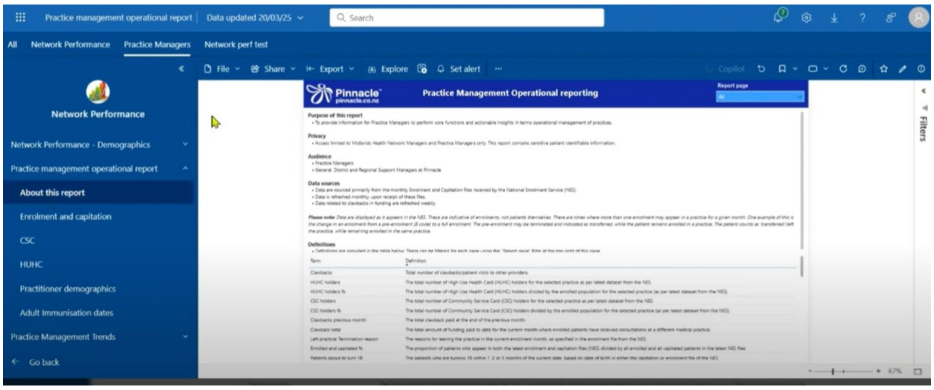
If you believe you should have access but don't, or if your practice isn't the only one showing, please contact Practice Systems Support at **practice.support@pinnacle.health.nz**.

You'll find this report under the **network performance dashboard**, beneath the main network performance options. We hope this guide makes it easier to use the report and take meaningful action each month.

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

About this report

This page provides helpful definitions and outlines the purpose of the report. You'll also see notes explaining how the data is sourced from the National Enrolment Service (NES), and why you might occasionally notice some data quirks. This is a good place to start if you're new to the report.



Enrolments and capitation

This page shows your enrolment numbers for the **most recently completed month**, and your capitation data for the **current month**. You'll typically receive the capitation payment around the 20th of each month.

You can see patients who are both enrolled and capitated, as well as any who are only in one category. If there are mismatches, it may be worth following up. Right-clicking on the charts allows you to drill through to view NHI-level data and see what's going on. You can also export this data to Excel.

Monthly enrolment changes

This section helps you monitor how your enrolled population is changing each month. It shows the number of patients joining and leaving your practice, as well as the net gain or loss.

You can also drill down to explore why patients have left – whether their enrolment expired, they transferred out, or sadly passed away. This can help keep your patient list accurate and up to date.

Enrolments requiring action

Here you'll find a summary of patients who may need follow-up or action soon.

- Patients about to turn 16 (and need to re-enrol as adults).
- Pre-enrolled babies (B-code) who are approaching the 12-month limit.
- Patients whose enrolment is about to expire due to inactivity.

You can use filters to look ahead one, two, or three months. If the chart is too small to click on easily, try switching to focus mode to expand the view. You can drill down to see the NHIs and follow up as needed.

Community Services Card (CSC) holders

This section gives you an overview of patients with a CSC, including their demographics and when their card is due to expire. You can filter to show expiry dates within the next one, two, or three months, and use the chart to filter the rest of the page.

This is a good way to see who may need their CSC status checked or updated. Drill-down is available where relevant.

High user health card information

Here you'll see details of your current high user health card holders, including how many consults they've had with a nurse or GP in the past year. This is based on quarterly CPI data, so there may be some delay in receiving updated figures.

You'll also see a list of patients who have had 12 or more visits but don't yet have a card. These may be worth reviewing to see if they're eligible.

Practitioner demographics

This section gives you a snapshot of each practitioner's enrolled population. You'll find demographic information like age, gender, ethnicity, and deprivation level.

There's also a helpful breakdown of patients with missing information – for example, those with no assigned practitioner, unknown ethnicity or gender, or unmapped deprivation status. You can drill into this data to see if it's something your team can update.

Immunisation eligibility

This page helps you identify patients due for immunisations at key milestone ages – particularly 45 and 65.

You can filter to see patients turning these ages in the next one, two, or three months, and drill down to view their NHIs for follow-up. This is especially useful for preparing ahead for scheduled immunisations like Shingrix.