

NEE CONVERSION

Office Detail Report

- “No show” rate (Confirmation & Completions section)
- Patient email address capture rate
- Same day appointments (Appointments section)
- **Next Eye Exams confirmed - “Moved to Appt Book” (Next Eye Exams Scheduled Last Year section)**
- Next Eye Exams for next year “Added for the future” (Next Eye Exams Pre-Appointments)

Follow these simple steps to access the Office Detail Report:

1. From the home page of TAB, click on the “reports” button at the top of the screen
2. Choose the “Office Detail Report” from the top dropdown menu
3. Enter Start and End Dates for the Report (note timeframe constraints on this screen)
4. Click on “refresh”

To print this report, click the “print” button at the top of the report after completing steps above

home | admin | email | logoff | Confirmation/Reference # [] search

Thursday | March 28, 2019
Test, Login

TAB
The Appointment Book

Processing Report: Please wait...

< back print reports ✓

- Audit History
- Office Detail Report**
- Office Snapshot Report
- ATR Retention Summary
- Notification Suppression Report
- Patient Recall Report
- Preferences Activity Report
- Automate Schedule Report
- TAB Dashboard Reports

Office: 0000 Eye V

Start Date: 03/28/2019

End Date: 03/28/2019

Order: By Time

Status: All

Doctor: []

Show Events: No

Secure Area Help

Once the report processing is complete, Summary Reports will be visible and you can view the section titled Next Eye Exams Added Last Visit:

Summary Reports

* = Required fields

Report Name: * Office Detail Report

[Report Definitions](#)

Up to 52 weeks of data can be retrieved.

Please provide a date range of not more than 52 weeks (one year).

NOTE: Please allow up to 5 minutes processing time for date ranges over 5 weeks.

Start Date: *

End Date: *

Office:

Region:

Next Eye Exams Added Last Visit

Next Eye Exams Added Last Visit	256	←	Potential # of NEE
Total Next Eye Exams Converted to Scheduled Appointments	85	←	# of NEE Converted
• Next Eye Exams Converted to Scheduled Appts via Office	41		
• Next Eye Exams Converted to Scheduled Appts via Patient Online	4		
• Next Eye Exams Converted to Scheduled Appts via SMS	2		
• Next Eye Exams Converted to Scheduled Appts via Auto Call	14		
• Next Eye Exams Converted to Scheduled Appts via Email	8		
• Next Eye Exams Rescheduled to Scheduled Appts via Email	16		
Percent of Next Eye Exams Converted to Scheduled Appointments	33.20 %	←	NEE Conversion %
Percent of Next Eye Exams Retained <small>Please use the ATR Retention Summary for more complete results </small>	28.12 %	←	Retention %
Unconfirmed Next Eye Exams	155		

Future Next Eye Exams

Checked In Exams	262		
Next Eye Exams Added for the Future	252	←	Next Year's NEEs
Percent Next Exams Added for Future	96.18 %		

Patient Communication Preferences

Effective patient retention starts with effective patient communications. As we continue to create appointments, update patient profiles and greet patients, it is important to ask how the patient would like to be contacted.

1. Whether a patient calls, walks into the office, or has arrived for their appointment start by creating an appointment or updating the appointment with the patients' communication preferences.
2. Select the "Yes" or "No" option on each of the four communication preferences.
 - Email
 - Text
 - Phone
 - Mail

IMPORTANT NOTE: It is necessary to address (Yes or No) all four communication preferences prior to Check Out.

Doctor Preference:

Patient Communication Preferences* (Please choose at least one communication preference)

How would the patient prefer to receive appointment reminders?

Select the patient's preferred reminder method(s) below and verify/update the appropriate contact information.

Email: Collecting E-mail addresses allow automated notifications from the office without any effort from the staff, for example, confirmations and reminders.

Text: Once opted-in, the patient will receive appointment reminders via text.

Phone: Is it OK if we call you with a live or pre-recorded appointment reminder?

Mail: Send mail notifications, for example eye exam reminder Postcards.

Copy patient information to schedule the next appointment for a household member. **i**