KPI Dashboard Starter Template

A starter structure for healthcare practice performance tracking

Purpose
Use this template to define the core metrics a practice should track across operations, financial performance, patient growth, staffing, compliance, and leadership accountability. This DOCX version provides the dashboard structure, KPI dictionary, scoring model, and meeting cadence. The same structure can be converted into Excel, Google Sheets, or a BI dashboard.

How to Use This Template
Select the KPIs that match your practice model, assign an owner to each metric, define the data source, set a target, and review performance on a weekly or monthly cadence. Use the scoring model to identify priorities and corrective actions.

Dashboard Summary Layout

KPI category	Metric	Current	Target	Status	Owner
Financial	Net collections			Green / Yellow / Red	
Financial	Collection rate			Green / Yellow / Red	
Operations	Cancellation / no-show rate			Green / Yellow / Red	
Operations	Provider utilization			Green / Yellow / Red	
Patient growth	New patient visits			Green / Yellow / Red	
Patient growth	Case acceptance / treatment conversion			Green / Yellow / Red	
Staffing	Payroll percentage			Green / Yellow / Red	
Compliance	Open compliance tasks			Green / Yellow / Red	

KPI Dictionary

KPI	Definition	Primary data source	Review cadence
Production / charges	Total value of services performed or charges entered during the period.	Practice management system / billing system	Monthly
Net collections	Payments collected after refunds and adjustments, depending on reporting method.	Billing system / bank reconciliation	Monthly
Collection rate	Collections divided by adjusted production or collectible charges.	Billing reports	Monthly
AR over 90 days	Percentage or dollar amount of accounts receivable older than 90 days.	Billing system	Monthly
Denial rate	Denied claims divided by submitted claims or total claims adjudicated.	Billing system / clearinghouse	Monthly
New patient visits	Number of new patients seen during the period.	Scheduling / EMR	Monthly
Cancellation / no-show rate	Cancelled and missed visits divided by scheduled visits.	Scheduling system	Weekly / monthly
Provider utilization	Used provider time divided by available provider time.	Schedule / time template	Monthly
Case acceptance / treatment conversion	Accepted treatment or scheduled cases divided by presented opportunities.	Treatment plan / CRM / EMR	Monthly
Patient reactivation	Inactive patients contacted and returned to care.	Recall / reactivation log	Monthly
Payroll percentage	Payroll expense divided by revenue or collections, based on practice policy.	Payroll / P&L	Monthly
Supply cost percentage	Clinical and office supplies divided by revenue or collections.	P&L / purchasing reports	Monthly
Compliance task closure rate	Completed compliance tasks divided by due compliance tasks.	Compliance tracker	Monthly
Open corrective actions	Number of unresolved audit, compliance, operational, or quality findings.	Action plan log	Monthly

Weighted Scoring Model

Scoring Method
Score each KPI from 1 to 5, multiply by the assigned weight, and rank the lowest weighted scores as improvement priorities. Example: 5 = on target or strong performance; 3 = moderate concern; 1 = urgent gap requiring corrective action.

KPI	Weight	Score 1-5	Weighted score	Corrective action
Net collections	15%			
Collection rate	15%			
Cancellation / no-show rate	10%			
Provider utilization	10%			
New patient visits	10%			
Case acceptance / conversion	10%			
Payroll percentage	10%			
AR over 90 days	10%			
Compliance task closure rate	10%			

Monthly KPI Meeting Agenda

☐	Checklist item	Notes / owner
☐	Review prior-month dashboard and identify green, yellow, and red indicators.	
☐	Compare actual results to target and prior period performance.	
☐	Review revenue cycle, scheduling, staffing, patient growth, and compliance indicators.	
☐	Identify root causes for missed targets and assign corrective actions.	
☐	Review open action items from the prior meeting and close completed items.	
☐	Assign owner, deadline, and evidence required for each new action item.	
☐	Document leadership decisions, barriers, resources needed, and follow-up date.	

Final Review and Action Plan

Priority	Gap / risk identified	Responsible party	Target date

Resource Use Note

This resource is provided for general business and compliance education only. It is not legal, medical, accounting, tax, financial, regulatory, accreditation, or clinical advice. Requirements vary by state, payer, specialty, facility type, accreditation body, and scope of services. Organizations should consult qualified legal, compliance, privacy, financial, clinical, accreditation, and professional advisors regarding their specific obligations and risk profile.