Operations Dashboard Example - Patient Portal

The attached is an example of a network patient portal operations dashboard for multiple clinics.

The author has given permission to share broadly without restrictions except as noted below.

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For further information about this resource please feel free to contact Jim Meyers, DrPH at jimmeyersdrph@gmail.com or 510-761-1609.

Reporting Period: 12/12/20xx to 12/18/20xx | Running Date : 12/19/20xx

Notes: Exclude age 12-18 year old.
In case patient age under 12, report will pull the email address from patient's guardian
Exclude Not Applicable site and unknown sites

Email Collection & Token Collection & Enrolled Summary by Visited Clinic During 12/12/20xx to 12/18/20xx

Location	Total # Kept Appointment {A}	Total # Email Collected {B}	Goal 50% Goal Email Collected From {A}	Goal 50% % Email Collected	Total # Token Distributed {C}	Goal 100% Goal Token Distributed From {B}	Goal 100% % Token Distributed	Pending {C}-{D}	Total # Token Enrolled {D}	Goal 50% Goal Token Enrolled From {D}	Goal 50% %Patient with Token Enrolled
Medical Sites											
Clinic 1											
Clinic 2											
Clinic 3											