

A1 Active and Inactive Definition Sheet

PRACTICE _____

DATE _____

Four groups of patients, and where each boundary came from.

PART 1 The four groups

STATUS	RULE, BY MONTHS SINCE THE LAST COMPLETED VISIT	WHO WORKS THESE PATIENTS
Active	Last completed visit within _____ months	Normal scheduling
Overdue band	From _____ months to _____ months	Recall system
Inactive	_____ months or more	This book's list
Excluded	Deceased, duplicate, do not contact, moved away	No one; logged on A4

For reference, the ADA's records definition treats a patient as inactive after 24 months with no dental service. A practice's outreach cut-off can be earlier. Write down which one you use.

PART 2 The count

LINE	ENTRY
Report used to pull the count	
Date field used last completed visit, not last contact	
Records in the system	
Active patients	
Raw inactive records - active	

SIGNED, DENTIST _____

SIGNED, OFFICE MANAGER _____

Counts and totals only: no patient names on this sheet.