

A1 Pool Sheet

Active patients by what the benefits field says, then the pool by recall visits in the last twelve months.

PRACTICE _____

EXPORT DATE _____

INACTIVE LINE _____ MONTHS

Apply the practice's exclusions and its inactive line before counting (in this order: deceased, duplicate, asked not to be contacted, moved away).

PART 1 Benefits status

BENEFITS FIELD ON THE ACTIVE LIST	PATIENTS	WHERE IT CAME FROM
A plan named		Export, benefits column
"None" recorded		Export, benefits column
Blank		Export, benefits column ask at the next visit
Active patients		Total of the three lines
Pool share $\text{none} \div \text{active}$		Formula

PART 2 The pool, by visits

THE POOL, BY RECALL VISITS IN THE LAST 12 MONTHS	PATIENTS	SHARE OF THE POOL
Regular two or more		
Occasional one		
Slipping none, still inside the inactive line		
Pool		

BLANK ROWS ASKED THIS MONTH _____

STILL BLANK _____

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