



A cleaner board, with more patients in active care.

JUNE 22 – JUNE 29, 2026

The systems kept watch in the background, and the flag list got noticeably shorter.

Happy Monday. Another calm, healthy week with no surprises. The headline is simple: **658 patients are now in active care across your four offices, up from 646 a week ago, your authorization approval rate is holding at 99%, and the weekly dormant sweep came back clean again, meaning no patient slipped out of care without being caught.** The biggest movement this week was on the dashboard's flag list: the insurance and payment holds your managers were working last week have come down sharply, insurance issues from 19 to 3 and payment holds from 22 to 5. Nothing here needs action from you. This is the steady rhythm the system was built to hold between the monthly checkpoints.

ACTIVE IN CARE

658

patients currently in care across all four offices

up 12 from last week

AUTHORIZATION APPROVAL

99%

of submitted authorizations approved by the payers

1% denial rate

NEW DORMANT CLIENTS

0

this week's sweep checked 686 charts and found none to chase

clean roster

LIVE COMMAND CENTER

Your operation, at a glance

Active clients by location

Cincinnati	244
Dayton	209
Columbus	121
Middletown	84
Active in care	658

What the dashboard flagged

Scheduled assessments	20
Insurance issues surfaced	3
Discharge pending	20
Discharge pending payment	5

Surfaced automatically each evening so your managers can act on them. The insurance and payment flags are both down sharply from last week.

MOVEMENT THIS WEEK

Across your four offices

The same census refresh, broken down by office, so each manager can see exactly where their numbers stand. Pulled from your live records, not estimates.

● New assessments scheduled

Cincinnati	7
Dayton	6
Columbus	4
Middletown	3
Total scheduled	20

New intakes on the calendar across the four offices, the front edge of next month's active census.

● In the discharge process, by office

Dayton	10
Cincinnati	9
Columbus	4
Middletown	2
Total in process	25

Charts flagged as moving toward discharge, most pending final paperwork or payment. The total fell from 40 to 25 this week, with payment holds down from 22 to 5, and active care still grew, which means new intakes are more than keeping up.

ROSTER COMPOSITION

Where every chart stands

A full breakdown of your roster by status, the same view leadership sees on the live dashboard. The eight buckets add up to all 712 charts on your books.

● Current roster, by status

Active in care	658	Discharge pending	20	Scheduled	20
Discharge pending payment	5	Insurance issue	3	Awaiting assessment	3
Assessment completed	2	Assessment only	1		

Active care is the large majority of your roster. The smaller buckets are exactly the charts your managers want surfaced, the ones that need a decision before they turn into a billing or coverage problem, and most of them are down from last week.

AUTHORIZATIONS & UTILIZATION

Staying ahead of the payers

Refreshed from your authorization report so renewals and approvals stay current and nothing lapses unnoticed.

● Authorization health

Approval rate	99%
Denial rate	1%
Clients with active auths	94
Pending requests	7

Nearly every authorization your team submits comes back approved, and the pending queue dropped from 11 to 7 this week.

● Renewals on the radar

Expiring in 30 days	13
Expiring in 60 days	41
Expiring in 90 days	87
High-utilization clients	6

The system watches every authorization window so renewals are handled before coverage lapses. The 30-day queue fell from 20 to 13 as renewals went in ahead of expiry.

UNDER THE HOOD

The systems running for you

These run on their own in the background. Here is what kept working this week so you do not have to think about it.

● DAILY

Live census snapshot

Refreshes your active-client counts across all four offices. This week it tracked your roster climbing from 646 to 658 in active care.

● DAILY

Authorization & utilization refresh

Pulls your authorization report so renewal and approval numbers stay current. Holding at a 99% approval rate across 94 clients with active authorizations.

● WEEKLY

Dormant-client sweep

Ran this week across 686 charts. Result: a clean roster with no new dormant clients, which means the reactivation work is keeping pace with discharges.

● MONTHLY

Top-of-month verification

Fires on its own this week at the start of July to re-check your whole roster against the Ohio Medicaid portal, with the full proof report.

PAST-CLIENT REACTIVATION

From email to the phones

The email campaign to win back former patients has finished its run across your entire past-client base. This week the dropped-referral list moves to a phone-first push, because reach plus a human call is where former patients actually come back.

● Emails sent, by group

Discharged patients	867
Dropped referrals	794
Prior therapy clients	82
Total emails sent	1,743

Every reachable former patient was contacted with a personalized sequence, not a single blast. Complete and logged.

● Why we are moving to calls

We took a hard look at your dropped referrals. Email alone is not moving them, just **2 interested and 0 booked** across the whole list. So the plan this week shifts to live phone calls, the channel that actually rebooks a former patient, with a fresh email landing right before to warm the line.

THIS WEEK'S MANUAL OUTREACH

The dropped-referral call plan

Built and ready to run. Clean, color-coded call sheets for every office, sorted warmest first, each with a short script and a result dropdown so nothing falls through.

● Call sheets by office

Cincinnati	185
Dayton	63
Columbus	41
Middletown	7
Total callable	296

Sorted into 7 priority tiers from warmest to coldest: 2 already interested, 5 hot, 69 warm, 220 cold.

● How it runs this week

Lisa and Domonique make the live calls, working each office sheet warmest-first. A **fresh three-touch email** with a new angle lands right before the calls. We also run a small **AI-voice test on the 18 warmest** to see whether it is worth scaling. Texting stays off until the calls prove out.

TOP-OF-MONTH INSURANCE VERIFICATION

Coming this week, on its own

At the start of every month the system re-checks every active patient against the Ohio Medicaid portal, automatically, so a lapsed plan never turns into a denied claim. The next run fires July 1. No one has to log in or pull anyone by hand.

● What it does for you

Every active patient is verified against Ohio Medicaid, the results are written **straight back into your system** so the front desk and billing see them in one place, coverage flags are cleared, and you get a **dated proof report** for the file. This is the layer that keeps claims from getting denied for coverage that quietly lapsed.

● Last month's run · June 1

Patients checked	611
Active & eligible	580 95%
Needs a second look	23
No record / lock-in	8
Errors	0

A clean, complete run. The same check fires again July 1, this week, with a fresh proof report and no action needed from you.

THE ROAD AHEAD

What you can look forward to

- **Dropped-referral calls:** the phone-first push is live this week. Lisa and Domonique work the 296 call sheets warmest-first while the door stays open for email replies.
- **July's verification:** the top-of-month insurance run fires on its own July 1. You will get the full proof report again without lifting a finger.
- **Renewals watch:** 13 authorizations expire in the next 30 days, down from 20 last week. The system is tracking each one so renewals go in before any coverage lapses.

● The bottom line

Another calm, healthy week. Your roster grew to **658 patients in active care**, your authorizations held a **99% approval rate**, and the dashboard's flag list got noticeably cleaner, with insurance issues down from 19 to 3 and payment holds from 22 to 5. The dormant sweep came back **clean** across 686 charts. The past-client email reactivation stands complete at **1,743 emails**, a **phone-first push on 296 dropped referrals** goes live this week, and your **top-of-month insurance verification** runs itself on July 1.

Census, dashboard, and roster figures reflect a live records refresh on June 28, 2026, pulled directly from your system, not estimates. The dormant sweep ran June 28, 2026 across 686 active charts. Authorization figures reflect the most recent report refresh on June 28, 2026. Reactivation email totals reflect the completed campaign through June 4, 2026. The dropped-referral call campaign begins the week of June 28, 2026 across 296 callable referrals. The top-of-month insurance verification last ran June 1, 2026 across 611 active patients and is scheduled to run again July 1, 2026.