



The **Daily Dispatch** & **Kpi** Tracker

The simple daily system to know if your NEMT
business is healthy or bleeding money

by **Nemiton**



Why most **NEMT** Businesses lose control



NEMT operators do not fail because they work too little. They fail because they cannot see problems until damage is irreversible.

The pattern of business failure:

Week 1: Driver completes 10% fewer trips than expected. Founder assumes this is normal variation and does not investigate.

Week 4: No-show rate increases from 8% to 15%. Founder notices but attributes it to "difficult patients" without analyzing which brokers or routes are affected.

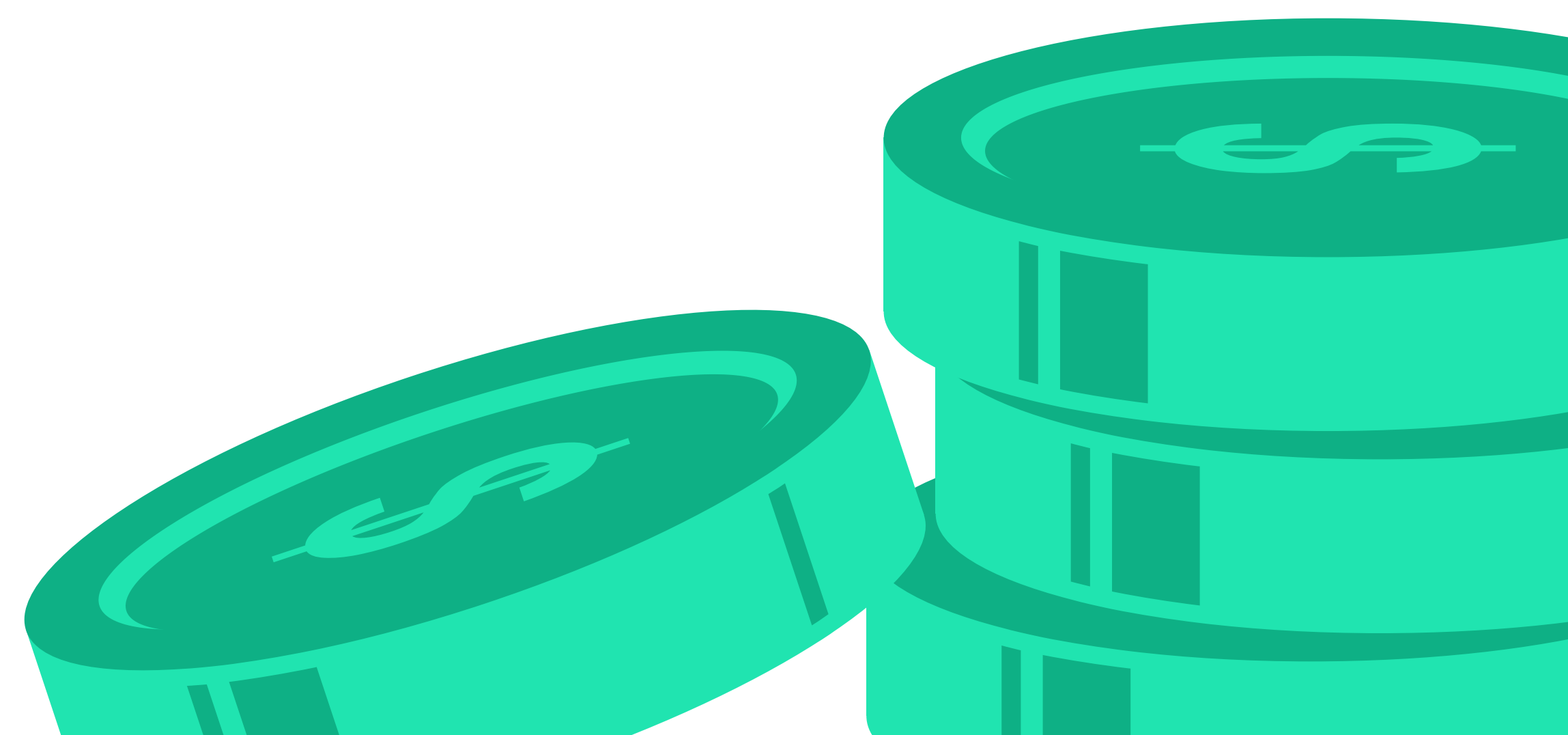
Week 8: Vehicle sits idle 3 days due to maintenance issue. Founder fixes vehicle but does not track downtime impact on revenue or calculate cost of reactive maintenance.

Week 12: Cash flow becomes tight. Founder reviews bank balance, discovers revenue is 20% below projections. By this point, problems have compounded for months. Driver underperformance + rising no-shows + untracked vehicle downtime = systemic profit erosion.

Week 16: Business cannot make payroll. Founder takes emergency loan or shuts down.

The difference between this scenario and a healthy business:

Healthy businesses track daily performance metrics, identify problems within 24–48 hours, and correct issues before they compound. Failing businesses operate on instinct, discover problems weeks or months late, and react to crises instead of preventing them.



Chaos vs. Systems:

Chaos-driven operation (typical failing NEMT business):

- Founder reacts to whatever seems most urgent each day
- No written record of trips completed, revenue earned, or problems encountered
- Driver performance evaluated based on founder's impression, not data
- Vehicle maintenance performed only when breakdowns occur
- Financial performance assessed monthly (or never) by reviewing bank balance

Result: Founder works 70+ hours per week, feels constantly overwhelmed, cannot identify why business is not profitable despite "being busy."

Systems-driven operation (profitable NEMT business):

- Founder reviews same metrics every morning and evening (15 minutes total)
- Written record of all trips, revenue, driver performance, vehicle status
- Driver performance evaluated weekly using objective data
- Vehicle maintenance scheduled proactively based on mileage and hours
- Financial performance tracked daily with weekly trend analysis

Result: Founder identifies problems within 24 hours, delegates based on data rather than impression, makes informed decisions about pricing, capacity, and hiring.

Why daily tracking matters:

Speed of problem detection:

Without tracking: Problems discovered after 4–12 weeks when financial damage is severe

With daily tracking: Problems detected within 1–3 days when corrective action is still effective

Problem	Detection Without Tracking	Detection With Tracking	Cost Difference
Driver chronically late	Discovered after 50+ trips affected	Detected after 2–3 late pickups	\$500 vs. \$50 in lost contracts
Vehicle fuel efficiency declining	Noticed when repair bill arrives	Spotted when MPG drops 15%	\$2,000 repair vs. \$200 maintenance
Broker payment delays	Realized when cash runs out	Flagged when 45-day claims appear	Crisis vs. proactive follow-up
No-show rate increasing	Never quantified	Tracked daily, investigated immediately	Lost revenue vs. corrected scheduling

This tracker provides:

A simple, repeatable system to monitor dispatch performance, driver productivity, vehicle utilization, revenue trends, and compliance risks—in 5 minutes per day.

It does not require software. It works with a spreadsheet, paper logbook, or basic dispatch system. The discipline to track daily is more important than the tool you use.

Use this tracker to gain visibility into your business before problems become disasters.



The Role of **Dispatch** in **Profitability**



Dispatch is not administrative work. Dispatch is the operational function that determines whether your business is profitable or unprofitable.

How dispatch decisions impact profit:

Decision #1: Trip acceptance

- Profitable dispatch: Accepts \$65 trip with 15-mile route, 1.5-hour duration, familiar pickup location
- Unprofitable dispatch: Accepts \$35 trip with 25-mile route, 2-hour duration, unreliable patient with 40% no-show history

Impact: \$30 profit vs. \$5 loss (if patient shows) or \$25 loss (if patient no-shows after driver arrives)



Decision #2: Driver assignment

- Profitable dispatch: Assigns trip to driver already in service area, minimizes deadhead miles
- Unprofitable dispatch: Assigns trip to driver 20 miles away, requiring 40-minute unpaid travel to pickup

Impact: \$25 profit vs. \$10 profit (60% margin erosion from deadhead time)

Decision #3: Route optimization

- Profitable dispatch: Sequences 4 trips in same geographic area, completes all in 6 hours
- Unprofitable dispatch: Accepts trips randomly, driver zigzags across service area, completes 3 trips in 6 hours

Impact: \$100 revenue (4 trips × \$25 profit) vs. \$75 revenue (3 trips × \$25 profit) = 33% productivity loss



Decision #4: No-show management

- Profitable dispatch: Tracks no-show patterns, declines chronic no-show patients or implements prepayment requirement
- Unprofitable dispatch: Continues accepting trips from patients who no-show 30%+ of time, absorbs wasted driver hours

Impact: On 100 trips/month with 10% no-show rate = 10 wasted trips = \$300–500 lost profit. At 30% no-show rate = 30 wasted trips = \$900–1,500 lost profit.



Decision #5: Cancellation response

- Profitable dispatch: Cancellation occurs 2 hours before pickup, reassigns driver to different trip or sends driver home (saves fuel and payroll)
- Unprofitable dispatch: Cancellation occurs after driver en route, driver already spent 30 minutes traveling to pickup

Impact: \$0 cost (redeployed driver) vs. \$15 cost (wasted driver time + fuel with no revenue)

Why dispatch errors compound:

Single bad dispatch decision loses \$10–\$30. Repeated daily across multiple trips, dispatch inefficiency costs \$500–\$2,000 per month. Over 12 months, \$6,000–\$24,000 in lost profit.

Dispatch is not just logistics. Dispatch is profit management.

Tracking dispatch performance daily allows you to:

- Identify which trip sources are profitable vs. unprofitable
- Measure driver productivity and route efficiency
- Quantify no-show and cancellation patterns
- Calculate true cost per trip including deadhead time
- Make data-driven decisions about trip acceptance and pricing

The metrics on the following pages show you how to track dispatch decisions and their financial impact.



Daily **Dispatch** Tracking Sheet



Track these metrics every day to monitor operational performance and identify problems within 24 hours.

Daily Dispatch Performance

(Complete Each Evening)

Metric	Today's Data	Weekly Average	Target
Trips scheduled	-----	-----	Based on capacity
Trips completed	-----	-----	90%+ of scheduled
Trips canceled (broker)	-----	-----	<15% of scheduled
Trips canceled (patient)	-----	-----	<5% of scheduled
Patient no-shows	-----	-----	<10% of scheduled
Driver no-shows	-----	-----	0%
Completion rate	----- %	----- %	85%+

Completion Rate Formula:

$(\text{Trips completed} \div \text{Trips scheduled}) \times 100$

Trip Breakdown by Type:

Trip Type	Trips Scheduled	Trips Completed	Completion Rate
Ambulatory	-----	-----	----- %
Wheelchair	-----	-----	----- %
Stretcher	-----	-----	----- %
Wait-and-return	-----	-----	----- %
Total	-----	-----	----- %

Cancellations & No-Shows Detail:

Reason	Count	Notes
Broker canceled <2 hours notice	-----	(List broker names)
Patient canceled <2 hours notice	-----	(Recurring patients?)
Patient no-show (waited, not home)	-----	(Patient IDs)
Facility canceled (appt rescheduled)	-----	(Which facilities?)
Weather/road conditions	-----	-----
Vehicle breakdown	-----	(Which vehicle?)
Driver unavailable	-----	(Reason)

Revenue Impact Estimate:

Category	Calculation	Amount
Completed trips × avg revenue	_____ trips ×	\$ _____
Lost revenue (cancellations)	_____ trips ×	-\$ _____
Lost revenue (no-shows)	_____ trips ×	-\$ _____
Net revenue (estimated)		\$ _____

Deadhead Miles Tracking:

Category	Miles
Total miles driven (all vehicles)	-----
Billable miles (with passenger)	-----
Deadhead miles	-----
Deadhead percentage	% -----

Target: <40% deadhead miles

Formula: (Deadhead miles ÷ Total miles) × 100

High deadhead percentage signals:

- Poor route optimization
- Accepting trips outside service area
- Inefficient driver assignment

Daily Dispatch Notes (Free Form):

Use this section to capture qualitative observations:

- Recurring problems (same patient no-shows, same facility always cancels)
- Driver feedback (traffic issues, facility access problems)
- Broker communication issues
- Opportunities identified (new trip requests, potential contracts)

Example entries:

- "Patient ID #4782 no-showed for 3rd time this month—flag for prepayment requirement"
- "ABC Dialysis canceled 4 trips today with <1 hour notice—discuss with facility coordinator"
- "Driver reported 45-min wait at XYZ Hospital loading zone—investigate alternative pickup location"

How to Use This Sheet:

Morning (5 minutes):

- Review yesterday's completed sheet
- Identify any red flags (high no-shows, vehicle issues, low completion rate)
- Brief drivers on priorities for today

Evening (10 minutes):

- Complete today's tracking sheet
- Calculate completion rate and revenue estimate
- Note any problems to address tomorrow

Weekly (15 minutes)

- Calculate weekly averages for all metrics
- Compare to previous week and monthly targets
- Identify trends requiring intervention

Driver Performance KPI



Driver performance directly determines service quality, contract retention, and profitability. Track these metrics weekly per driver

Weekly Driver Performance Scorecard:

Driver Name: _____

Week Ending: _____

Metric	This Week	Last Week	Target	Status
Trips assigned	-----	-----	Based on schedule	☐
Trips completed	-----	-----	95%+ of assigned	☐
On-time pickups	-----	-----	90%+	☐
Late pickups	-----	-----	<10%	☐
Patient complaints	-----	-----	0	☐
Broker complaints	-----	-----	0	☐
Documentation errors	-----	-----	<5%	☐
Vehicle incidents	-----	-----	0	☐

Status: ☐ Excellent ☐ Acceptable ☐ Needs Improvement

On-Time Performance Calculation:

Formula: $(\text{On-time pickups} \div \text{Total pickups}) \times 100$

On-time definition: Driver arrives within pickup window (typically ± 15 minutes of scheduled time)

Why this matters:

- Brokers track on-time rates and penalize or terminate providers below 85%
- Facilities stop requesting your service if drivers are chronically late
- Late pickups cause missed appointments, generating complaints and lost contracts

Target: 90%+ on-time rate per driver

If below 90%:

- Review trip assignments (unrealistic timing?)
- Check traffic patterns (consistent delays on specific routes?)
- Assess driver time management (leaving late, poor route knowledge?)
- Provide coaching or disciplinary action if performance does not improve

Documentation Quality:

Track documentation errors per driver to prevent audit failures.

Common errors:

- Missing patient signature
- Missing odometer readings
- Incorrect pickup/dropoff times
- No-show documentation incomplete
- Trip logs illegible or incomplete

Acceptable rate: <5% of trips with documentation errors

Action threshold: If driver consistently exceeds 10% error rate, retrain or replace

Productivity Metrics:

Category	Calculation	This Week
Trips per hour worked	Trips completed ÷ Hours worked	-----
Revenue per hour	Estimated trip revenue ÷ Hours worked	-\$-----
Miles per trip	Total miles ÷ Trips completed	-----

Trips per hour benchmark:

0.6–0.8 trips/hour (accounting for drive time, wait time, documentation)

Low productivity signals:

- Driver taking excessive breaks
- Inefficient routes
- Long wait times at facilities
- Poor trip sequencing by dispatch

Incident & Complaint Tracking:

Incidents (any reportable event):

- ☐ Vehicle accident (minor or major)
- ☐ Patient injury during transport
- ☐ Patient fall during transfer
- ☐ Equipment failure (wheelchair lift, securement)
- ☐ Traffic violation or citation
- ☐ Vehicle breakdown requiring tow

Complaints:

- ☐ Patient complaint (late pickup, rough driving, unprofessional behavior)
- ☐ Facility complaint (driver behavior, vehicle condition)
- ☐ Broker complaint (documentation, communication)

Driver Performance Summary:

Top performer criteria:

- 95%+ completion rate
- 95%+ on-time rate
- 0 complaints
- <5% documentation errors
- 0 incidents

Acceptable performer criteria:

Acceptable performer criteria:

- 90%+ completion rate
- 90%+ on-time rate
- <2 complaints per quarter
- <10% documentation errors
- <1 incident per quarter

Underperformer criteria (requires immediate action):

- <85% completion rate
- <85% on-time rate
- 3+ complaints per quarter
- 15% documentation errors
- 2+ incidents per quarter

How to Use Driver KPIs:

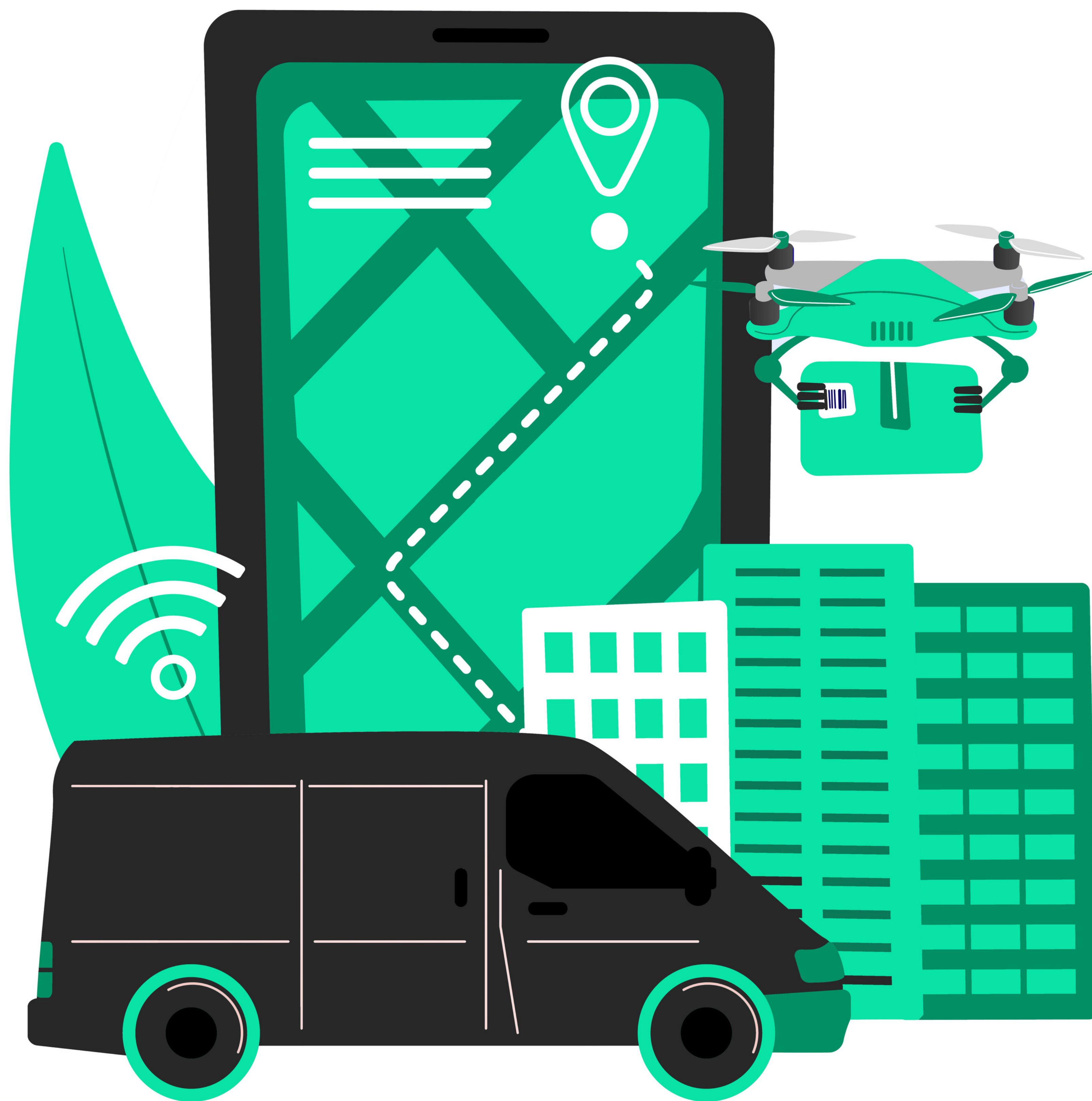
Weekly: Review each driver's scorecard, provide feedback on areas needing improvement

Monthly: Compare drivers to identify top performers (reward/bonus) and underperformers (coaching/discipline)

Quarterly: Formal performance reviews with written documentation

Annually: Use data to make retention, promotion, or termination decisions

Vehicle & Fleet Kpis



Vehicle performance determines service availability, maintenance costs, and operational efficiency. Track these metrics weekly per vehicle.

Weekly Vehicle Performance Tracking:

Vehicle ID/Name: _____

Week Ending: _____

Metric	This Week	Target	Status
Available hours	-----	Based on schedule	☐
Utilized hours	-----	60–80% of available	☐
Idle hours	-----	<20% of available	☐
Downtime hours (maintenance/ repair)	-----	<5% of available	☐
Trips completed	-----	Maximized	☐
Total miles driven	-----	Tracked	☐
Fuel consumed	-----	Based on MPG	☐
Miles per gallon (MPG)	-----	Baseline ±10%	☐

Status: ☐ Excellent ☐ Acceptable ☐ Needs Attention

Vehicle Utilization Rate:

Formula: (Utilized hours ÷ Available hours) × 100

Example:

- Vehicle available 50 hours this week (10 hours/day × 5 days)
- Vehicle utilized 35 hours (driving, waiting for patients)
- Utilization = (35 ÷ 50) × 100 = 70%

Target: 60–80% utilization

Below 50%: Underutilized, consider reducing fleet or increasing trip volume

Above 85%: Overutilized, driver/vehicle fatigue risk, consider adding capacity

Productivity Metrics:

Downtime Reason	Hours This Week	Notes
Scheduled maintenance (oil change, inspection)	-----	(Preventable with planning)
Unscheduled repair (breakdown)	-----	(What failed? Why?)
Waiting for parts	-----	(Inventory issue?)
Accident damage repair	-----	(Driver fault? Other party?)
Total downtime	-----	

Target: <5% downtime (2.5 hours per 50-hour week)

High downtime signals:

- Poor preventive maintenance
- Vehicle age/condition issues
- Driver neglect (not reporting problems early)

Downtime cost calculation:

- Downtime hours × Average revenue per hour = Lost revenue
- Example: 10 hours downtime × \$40/hour = **\$400 lost revenue**

Fuel Efficiency Monitoring:

Metric	Miles Driven	Fuel Used (gal)	MPG	Change from Baseline
Baseline	-----	-----	-----	-----
This week	-----	-----	-----	-----

Baseline MPG: Establish average MPG when vehicle is new or recently serviced

Action thresholds:

- 10–15% decline: Schedule inspection (tire pressure, air filter, alignment)
- 15%+ decline: Immediate diagnostic (engine issue, transmission problem)

Why this matters: 15% MPG decline on vehicle driving 1,000 miles/month at \$3.50/gallon = \$50–75/month in excess fuel cost = \$600–900/year

Maintenance Compliance Tracking:

Maintenance	Last Completed	Due Date/Mileage	Status
Oil change	-----	Every 5,000 mi or 6 months	☐ Current ☐ Due ☐ Overdue
Tire rotation	-----	Every 7,500 mi	☐ Current ☐ Due ☐ Overdue
State safety inspection	-----	Annual	☐ Current ☐ Due ☐ Overdue
Wheelchair lift inspection	-----	Annual or semi-annual	☐ Current ☐ Due ☐ Overdue
DOT inspection (if required)	-----	Annual	☐ Current ☐ Due ☐ Overdue
Brake inspection	-----	Every 15,000 mi or annually	☐ Current ☐ Due ☐ Overdue

Critical: Set calendar alerts 30 days before due dates. Operating with expired inspections = license violations, insurance voids, contract suspension.

Vehicle Incident & Damage Log:

Type	Description	Cost	Driver	Preventable
Accident		-----		☐ Yes ☐ No
Damage		-----		☐ Yes ☐ No
Breakdown		-----		☐ Yes ☐ No

Preventable incidents:

- Driver negligence (speeding, distracted driving)
- Deferred maintenance (brakes, tires)
- Ignored warning signs (check engine light, unusual sounds)

Non-preventable incidents:

- Other driver at fault
- Road debris
- Weather-related damage

Target: 0 preventable incidents per vehicle per year

Fleet-Level Summary (All Vehicles):

Metric	Fleet Total	Per Vehicle Average
Total available hours	-----	-----
Total utilized hours	-----	-----
Total downtime hours	-----	-----
Fleet utilization rate	-----	-----
Total trips completed	-----	-----
Total miles driven	-----	-----
Total fuel cost	-----	-----

Use fleet summary to:

- Determine if adding vehicles is justified (if fleet utilization >75%)
- Identify underperforming vehicles (candidates for disposal)
- Calculate fleet-wide fuel and maintenance costs

Revenue & Cash Flow Indicators



Daily revenue tracking prevents cash flow surprises and enables proactive financial management.

Daily Revenue Estimate:

Category	Calculation	Amount
Trips completed today	_____ trips	\$ _____
Average revenue per trip	(Use historical avg)	\$ _____
Estimated gross revenue	Trips × Avg revenue	\$ _____
Estimated expenses	Driver pay + fuel + variable costs	\$ _____
Estimated net revenue	Gross – Expenses	\$ _____

Note: This is an estimate. Actual revenue depends on claim acceptance, which occurs 30–60 days later

Weekly Revenue Tracking:

Day	Trips Completed	Estimated Revenue	Actual Expenses	Net Revenue Estimate
Monday	-----	\$ -----	\$ -----	\$ -----
Tuesday	-----	\$ -----	\$ -----	\$ -----
Wednesday	-----	\$ -----	\$ -----	\$ -----
Thursday	-----	\$ -----	\$ -----	\$ -----
Friday	-----	\$ -----	\$ -----	\$ -----
Saturday	-----	\$ -----	\$ -----	\$ -----
Sunday	-----	\$ -----	\$ -----	\$ -----

Target weekly revenue: Based on trip volume and pricing (e.g., 100 trips × \$50 avg = \$5,000)

Outstanding Claims Tracking:

Because NEMT operates on 30–60 day payment cycles, you must track unbilled and unpaid trips.

Broker	Trips Completed	Estimated Value	Trips Billed	Days Outstanding	Status
Broker A	-----	\$-----	-----	-----	☐ On time ☐ Delayed
Broker B	-----	\$-----	-----	-----	☐ On time ☐ Delayed
Medicaid Direct	-----	\$-----	-----	-----	☐ On time ☐ Delayed
Private Pay	-----	\$-----	-----	-----	☐ On time ☐ Delayed
Total	-----	\$-----	-----	-----	☐ On time ☐ Delayed

Action thresholds:

- **45 days outstanding:** Follow up with payer to verify claim status
- **60 days outstanding:** Escalate to billing manager or payer rep
- **90 days outstanding:** Dispute resolution or write-off consideration

Cash Flow Health Indicators:

Indicator	Current Status	Target	Signal
Operating cash balance	\$_____	\$5,000–\$10,000 minimum	☐ Healthy ☐ Low ☐ Critical
Days cash on hand	\$_____	30+ days of expenses	☐ Healthy ☐ Low ☐ Critical
Outstanding AR <45 days	\$_____	Maximized	☐ Healthy ☐ Low ☐ Critical
Outstanding AR >60 days	\$_____	Minimized	☐ Healthy ☐ Low ☐ Critical
Weekly revenue trend	☐ Increasing ☐ Stable ☐ Declining	Stable or increasing	☐ Healthy ☐ Low ☐ Critical

Days cash on hand formula:

Operating cash balance ÷ (Weekly expenses ÷ 7)

Example:

- Cash balance: \$8,000
- Weekly expenses: \$2,000 (\$285/day)
- Days cash = \$8,000 ÷ \$285 = 28 days

Critical threshold: <15 days cash on hand = imminent cash flow crisis

Revenue Per Trip by Payer:

Track which payers are most profitable.

Broker	Trips This Week	Avg Revenue Per Trip	Avg Cost Per Trip	Avg Profit Per Trip	Profit Margin
Broker A	-----	\$-----	\$-----	\$-----	-----%
Broker B	-----	\$-----	\$-----	\$-----	-----%
Medicaid Direct	-----	\$-----	\$-----	\$-----	-----%
Private Pay	-----	\$-----	\$-----	\$-----	-----%

Use this data to:

- Prioritize high-profit payers
- Renegotiate or drop low-profit payers
- Adjust trip acceptance criteria

Claim Denial Tracking:

Week	Claims Submitted	Claims Submitted	Denial Rate	Net Revenue Estimate
This week	-----	-----	-----%	
Last week	-----	-----	-----%	

Target denial rate: <5%
Action threshold: >10% requires immediate process audit

Common denial reasons:

- Missing patient signature
- Incorrect service date
- No prior authorization
- Duplicate billing
- Patient not eligible on service date

How to Use Revenue Indicators:

- **Daily:** Estimate revenue and compare to target
- **Weekly:** Calculate actual revenue vs. estimated, identify variances
- **Monthly:** Reconcile billed trips to payments received, follow up on outstanding claims
- **Quarterly:** Analyze payer profitability, renegotiate rates or drop unprofitable contracts

Compliance & Risk Signals



Track these indicators daily to prevent compliance violations, audit failures, and contract suspensions

Daily Compliance Checklist:

- [] All completed trips have signed documentation
- [] Driver trip logs match dispatch records
- [] No expired vehicle inspections
- [] No expired driver licenses or certifications
- [] All incidents reported and documented
- [] Patient complaints logged and addressed
- [] HIPAA violations reported (if any occurred)

Missing Documentation Tracker:

Trip Date	Patient/Trip	Missing Item	Assigned To	Resolved?
		☐ Signature ☐ Odometer ☐ Times ☐ Authorization ☐ Signature ☐ Odometer ☐ Times ☐ Authorization ☐ Signature ☐ Odometer ☐ Times ☐ Authorization		

- **Target:** 0 missing documentation items
- **Acceptable:** <2% of trips with missing items (corrected within 48 hours)
- **Critical:** >5% missing documentation = systemic process failure

License & Certification Expiration Tracking:

License/Permit	Expiration Date	Days Until Expiration	Status
State NEMT License	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Commercial Auto Insurance	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Workers' Comp Insurance	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Vehicle Registration (per vehicle)	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Vehicle Inspection (per vehicle)	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Wheelchair Lift Cert (per vehicle)	-----	-----	☐ Current ☐ RenewSoon ☐ Expired
Driver License (per driver)	-----	-----	☐ Current ☐ RenewSoon ☐ Expired

Critical: Expired license = cease operations immediately until renewed

Driver Qualification Compliance:

Driver	Check Date	Drug Test Date	Training Complete?	Status
Driver 1	-----	-----	☐ Yes ☐ No	☐ Compliant ☐ Non-compliant
Driver 2	-----	-----	☐ Yes ☐ No	☐ Compliant ☐ Non-compliant
Driver 3	-----	-----	☐ Yes ☐ No	☐ Compliant ☐ Non-compliant

Compliance requirements (state-specific):

- Background check completed within 12 months of hire (or per state requirement)
- Pre-employment drug test negative
- Annual HIPAA training completed
- Wheelchair securement training completed

If driver is non-compliant, they cannot transport patients until resolved.

Risk Event Tracking:

Log all events that could trigger audits, contract reviews, or enforcement actions.

Date	Event Type	Description	Severity	Action Taken	Resolved?
	Patient complaint		☐ Low ☐ Medium ☐ High		
	Broker complaint		☐ Low ☐ Medium ☐ High		
	Accident		☐ Low ☐ Medium ☐ High		
	HIPAA breach		☐ Low ☐ Medium ☐ High		
	License lapse		☐ Low ☐ Medium ☐ High		

Severity definitions:

- **Low:** Minor issue, no compliance impact (e.g., patient unhappy with wait time)
- **Medium:** Compliance concern, requires correction (e.g., missing signature caught before billing)
- **High:** Serious violation, immediate corrective action required (e.g., accident, HIPAA breach, expired license)

High-severity events require:

- Immediate investigation
- Written incident report
- Corrective action plan
- Follow-up to prevent recurrence

Audit Readiness Score (Weekly Self-Assessment):

Rate your business on these criteria (1 = Poor, 5 = Excellent)

Category	Score (1–5)	Notes
All trip logs complete and signed	-----	
All driver files current and complete	-----	
All vehicle inspections current	-----	
All licenses and permits current	-----	
All insurance policies active	-----	
HIPAA policies documented and trained	-----	
Incident reports filed for all events	-----	
Total Score	35	

Scoring:

- 30–35: Audit-ready
- 25–29: Minor gaps, correctable within 1 week
- 20–24: Significant gaps, correctable within 2–4 weeks
- <20: Not audit-ready, high risk of violations

If score is below 25, prioritize compliance before pursuing growth.

Red Flags That Indicate Imminent Problems

- ☐ 3+ trips with missing documentation in past 7 days
- ☐ Any license expired or within 15 days of expiration
- ☐ Driver operating with expired certification
- ☐ Vehicle operating with expired inspection
- ☐ Insurance claim denied due to coverage lapse
- ☐ 2+ patient complaints in past 30 days
- ☐ Broker audit notification received
- ☐ HIPAA breach occurred (even if minor)

If any red flag is checked: Stop. Address immediately before continuing operations.

The **5-Minute** Daily Review Routine



Consistency matters more than perfection. Use this routine every morning and evening to maintain visibility and control.

Morning Routine (3 minutes)

Review yesterday's performance:

- ☐ Check trip completion rate (target: 85%+)
- ☐ Identify cancellations or no-shows (any patterns?)
- ☐ Review driver performance (any issues flagged?)
- ☐ Check vehicle status (all available today?)
- ☐ Note any incidents or complaints from yesterday

Plan today:

- ☐ Confirm all trips are assigned to available drivers
- ☐ Verify all drivers are compliant and available
- ☐ Check weather or traffic alerts affecting service
- ☐ Prioritize any follow-up actions from yesterday

Questions to answer:

1. Did we meet our targets yesterday? (If no, why not?)
2. Are there any immediate problems to address today?
3. What is our revenue estimate for today?

Evening Routine (5 minutes)

Complete daily tracking:

- ☐ Log trips scheduled vs. completed
- ☐ Record cancellations, no-shows, reasons
- ☐ Calculate completion rate and revenue estimate
- ☐ Update driver performance notes
- ☐ Log vehicle utilization and downtime
- ☐ Note any compliance issues or missing documentation

Identify problems:

- ☐ Any driver below 90% on-time rate?
- ☐ Any vehicle with excessive downtime?
- ☐ Any documentation missing?
- ☐ Any compliance red flags?

Plan tomorrow:

- ☐ Assign trips for tomorrow
- ☐ Address any flagged issues
- ☐ Schedule any needed maintenance or follow-ups

Questions to answer:

1. Did we hit our targets today? (If no, what needs to change?)
2. Are there any trends developing? (3+ days of similar issues?)
3. What must be corrected before tomorrow?

Weekly Deep Review

(15 minutes, Friday evening or Monday morning)

Calculate weekly totals:

- ☐ Total trips completed vs. target
- ☐ Weekly completion rate
- ☐ Weekly revenue vs. target
- ☐ Driver performance summaries
- ☐ Vehicle utilization rates
- ☐ Compliance status check

Trend analysis:

- ☐ Compare this week to last week (improving or declining?)
- ☐ Identify recurring problems (same issues 3+ days?)
- ☐ Spot patterns in no-shows, cancellations, delays

Action planning:

- ☐ What worked well this week? (Do more of this)
- ☐ What didn't work? (Fix or eliminate)
- ☐ What needs immediate attention next week?
- ☐ Any driver coaching or disciplinary actions needed?
- ☐ Any vehicle maintenance to schedule?

Monthly Executive Review

(30 minutes, first Monday of month)

Financial performance:

- ☐ Calculate total revenue (billed and collected)
- ☐ Calculate total expenses
- ☐ Determine profit margin
- ☐ Compare to monthly target

Operational performance:

- ☐ Monthly trip volume vs. target
- ☐ Monthly completion rate vs. target
- ☐ Driver performance rankings
- ☐ Vehicle performance analysis

Strategic decisions:

- ☐ Are we on track to hit annual goals?
- ☐ Do we need to add vehicles or drivers?
- ☐ Should we drop any low-performing brokers or contracts?
- ☐ What are the top 3 priorities for next month?

How to Build the Habit:

Week 1: Set phone alarm for morning and evening review times. Complete tracking even if inconvenient.

Week 2: Refine your process. Eliminate unnecessary tracking. Focus on metrics that actually matter.

Week 3: Delegate portions of tracking. Train driver or office staff to complete daily logs. You review and analyze.

Week 4: Tracking becomes automatic. You no longer need reminders. Data reveals patterns you never saw before.

Month 2+: Use data to make better decisions. Eliminate unprofitable work. Reward high performers. Fix systemic problems.

This is how profitable NEMT businesses operate.

Weekly **Summary** & Trend Tracking



Daily data is useful. Weekly trends are actionable.
Monthly patterns reveal strategic opportunities.

Claim Denial Tracking:

Metric	This Week	Last Week	Change	Status
Trips scheduled	-----	-----	-----%	
Trips completed	-----	-----	-----%	
Completion rate	-----	-----	-----%	
Revenue (estimated)	-----	-----	-----%	
Expenses	-----	-----	-----%	
Net profit (estimated)	-----	-----	-----%	
No-show rate	-----	-----	-----%	
On-time rate	-----	-----	-----%	
Vehicle utilization	-----	-----	-----%	

Status: ☐ Improving ☐ Stable ☐ Declining

Trend Identification (4-Week View):

Metric	Week 1	Week 1	Week 1	Week 1	Trend
Trips completed	-----	-----	-----	-----	□ ↑ □ → □ ↓
Completion rate (%)	-----	-----	-----	-----	□ ↑ □ → □ ↓
Revenue	-----	-----	-----	-----	□ ↑ □ → □ ↓
No-show rate (%)	-----	-----	-----	-----	□ ↑ □ → □ ↓
On-time rate (%)	-----	-----	-----	-----	□ ↑ □ → □ ↓

Trend symbols:

- ↑ = Improving (good if revenue, bad if no-shows)
- → = Stable
- ↓ = Declining (bad if revenue, good if no-shows)

Pattern Recognition (What to Look For)

Positive trends to reinforce:

- [] Completion rate improving week-over-week
- [] Revenue increasing without proportional expense increase
- [] On-time rate consistently >90%
- [] No-show rate declining
- [] Vehicle utilization optimizing (60–75% range)

Negative trends requiring intervention:

- [] Completion rate declining 3+ consecutive weeks
- [] Revenue flat or declining despite same trip volume
- [] On-time rate declining below 90%
- [] No-show rate increasing 3+ consecutive weeks
- [] Vehicle utilization below 50% (underutilized) or above 85% (overworked)

When to Intervene (Decision Framework)

Single week deviation: Monitor, do not overreact

- Example: Completion rate drops from 92% to 85% one week due to weather
- Action: Note it, but wait to see if pattern continues

Two consecutive weeks: Investigate cause

- Example: No-show rate increases from 8% to 13% two weeks in a row
- Action: Analyze which patients/brokers are no-showing, identify pattern

Three consecutive weeks: Implement corrective action

- Example: On-time rate declines from 93% to 88% to 85% over three weeks
- Action: Review driver performance, adjust scheduling, provide coaching

Four+ consecutive weeks: Major operational change required

- Example: Revenue declines 15% for four straight weeks
- Action: Renegotiate rates, drop unprofitable contracts, adjust service model

Root Cause Analysis (Why Problems Happen)

When negative trends emerge, ask these questions:

Declining completion rate:

- Are brokers canceling more frequently? (Contact broker, negotiate penalties)
- Are patients no-showing more often? (Implement prepayment or drop chronic no-shows)
- Are vehicles breaking down? (Improve maintenance, consider vehicle replacement)
- Are drivers unavailable? (Hiring issue, scheduling issue, retention problem)

Declining revenue:

- Are trip volumes decreasing? (Market issue, lost contracts, seasonal variation)
- Are payer rates declining? (Renegotiate or switch payers)
- Are claim denials increasing? (Fix documentation, improve billing processes)
- Are we accepting lower-paying trips? (Revisit pricing strategy)

Increasing no-shows:

- Which brokers have highest no-show rates? (Communicate with broker, request patient compliance programs)
- Which patients are chronic no-shows? (Flag for prepayment or decline future trips)
- Are reminder calls being made? (Implement 24-hour confirmation calls)

Monthly Comparison (Track Year-OverYear)

Metric	This Month	Same Month Last Year	Change
Total trips	-----	-----	-----
Total revenue	-----	-----	-----
Completion rate	-----	-----	-----
Profit margin	-----	-----	-----

Use this to:

- Identify seasonal patterns (e.g., January always slower than June)
- Measure true growth (not just month-to-month noise)
- Set realistic targets based on historical performance

This is how data-driven operators make decisions.

They do not guess. They do not react emotionally. They analyze trends, identify root causes, implement corrective actions, and measure results.

Common Tracking Mistakes



Operators who track the wrong metrics make poor decisions. Avoid these errors

Mistake #1:

Tracking Vanity Metrics Instead of Profit Indicators

Vanity metric: Total trips completed

Why it is misleading: High trip volume with low margins = unprofitable growth

Profit indicator: Net profit per trip

Why it matters: Shows whether volume is generating sustainable profit

Example:

- Month 1: 200 trips, \$10,000 revenue, \$9,000 expenses = \$1,000 profit (\$5/trip)
- Month 2: 250 trips, \$11,500 revenue, \$11,000 expenses = \$500 profit (\$2/trip)

Vanity metric says: We grew 25% (250 vs 200 trips)!

Reality: Profit margin declined 60% (\$5/trip to \$2/trip). Growth is destroying profitability.

Fix: Track profit per trip, not just trip volume.

Mistake #2:

Ignoring Warning Signs Until Crisis

Warning sign: On-time rate declines from 93% to 87% over 3 weeks

Typical response: "It's not that bad, we're still close to 90%"

What happens: Broker receives complaint data, issues performance warning. On-time rate continues declining to 82%. Broker suspends contract.

Result: Lost \$15,000/month contract because operator did not intervene when trend was correctable.

Fix: Act on 3-week negative trends immediately, do not wait for crisis.

Mistake #3:

Not Tracking Deadhead Miles

Operator believes: "We completed 30 trips today, drove 600 miles, so we billed 600 miles."

Reality: 600 total miles includes:

- 400 miles with passenger (billable)
- 200 miles driving to pickups and returning to service area (deadhead, not billable)

Impact: Operator thinks they are generating \$2/mile revenue. Actually generating \$1.33/mile ($\$2 \times 400 \text{ billable} \div 600 \text{ total}$).

Fix: Track billable vs. deadhead miles daily. Target <40% deadhead.

Mistake #4:

Tracking Too Many Metrics

Operator tracks: 40+ data points daily across spreadsheets, dispatch systems, and notebooks.

Result: Data overload. Operator spends 1 hour/day tracking, no time analyzing. Misses critical problems because signal is buried in noise.

Fix: Track 10–15 essential metrics (completion rate, on-time rate, revenue, no-shows, downtime, cash balance). Master those before adding more.

Mistake #5:

Tracking Data But Never Reviewing It

Operator completes: Daily tracking sheets religiously.

Operator never: Analyzes trends, identifies patterns, or takes corrective action.

Result: Data exists but provides no value. Problems compound undetected.

Fix: Schedule weekly review (15 minutes). Use data to make decisions, not just collect it.

Mistake #6:

Comparing Your Business to Others Without Context

Operator hears: "Industry average completion rate is 85%"

Operator thinks: "We're at 82%, close enough"

Reality: Profitable operators achieve 90%+ completion rates. 82% is underperforming.

Fix: Set targets based on profitability requirements, not industry averages. Industry averages include failing businesses.

Mistake #7:

Trusting Memory Over Data

Operator believes: "Driver John is our best performer. He's always on time."

Data shows: John's on-time rate is 84%, below target of 90%. Driver Sarah is 96% on-time but gets less recognition.

Result: Rewarding wrong driver, reinforcing mediocrity instead of excellence.

Fix: Base performance evaluations on tracked data, not impressions.

Mistake #8:

Not Tracking No-Show Patterns

Operator logs: "5 no-shows today"

Operator does not track: Which patients, which brokers, which facilities, which times of day

Result: Cannot identify root cause. Continues accepting trips from chronic no-show patients, wasting driver time indefinitely.

Fix: Log no-show details (patient ID, broker, pickup location, time). Analyze monthly. Block or require prepayment for repeat no-shows.

Mistake #9:

Tracking Gross Revenue, Ignoring Costs

Operator celebrates: "\$50,000 revenue this month!"

Operator ignores: \$48,000 in expenses = \$2,000 profit (4% margin)

Reality: Business is barely profitable despite high revenue.

Fix: Track net profit and profit margin, not just revenue.

Mistake #10:

Changing Too Many Variables at Once

Operator implements: New dispatch software + new pricing + new driver + new broker contract all in same week

Result: Performance changes but operator cannot identify which change caused improvement or decline.

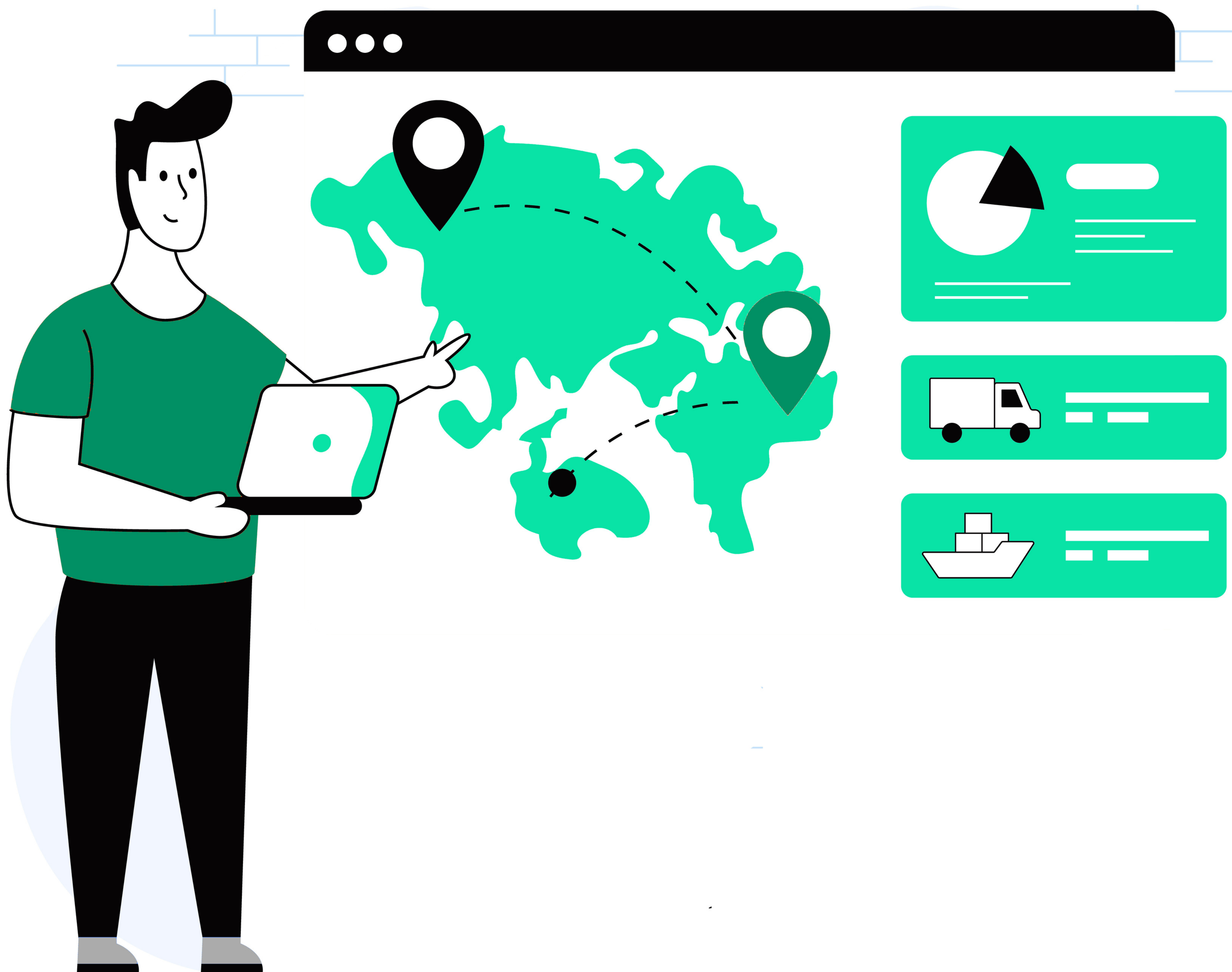
Fix: Change one variable at a time. Measure impact for 2–4 weeks before implementing next change.

The Principle:

Track what matters. Ignore what does not. Use data to make decisions. Act on trends before they become crises

Profitable NEMT operators are not smarter. They are more disciplined about tracking, analyzing, and responding to operational data.

From **Manual** Tracking To **Systems**



This tracker provides the foundation for data-driven decision-making. As your business scales, you will transition from manual tracking to automated systems.

What this tracker accomplished:

You now have a framework to monitor daily dispatch performance, measure driver and vehicle productivity, estimate revenue and track cash flow, identify compliance risks, and spot trends before they become crises.

What this tracker did not provide:

It did not automate data collection or analysis. It did not integrate dispatch, billing, and financial systems. It did not predict future problems before they occur. It did not create workflows that prevent errors automatically.

When to transition to automated systems:

When to transition to automated systems

Manual tracking works when:

- Operating 1–3 vehicles
- Completing <100 trips/week
- Owner personally manages all dispatch and operations
- Budget does not allow software investment (\$100–\$500/month)

Automated systems become necessary when:

- Operating 4+ vehicles
- Completing 100+ trips/week
- Hiring dispatch staff or operations manager
- Manual tracking consumes 1+ hour/day
- Missing data points due to volume

System Evolution Roadmap:

Stage 1: Spreadsheet + Paper Logs (Months 1–6)

- Track metrics using this template in Excel/Google Sheets
- Drivers complete paper trip logs
- Owner reviews and enters data daily
- Cost: \$0

Stage 2: Basic Dispatch Software (Months 7–12)

- Implement dispatch software (RouteGenie, Circulation, TripMaster, etc.)
- Automatic trip logging, GPS tracking, driver mobile app
- Export data to Excel for analysis
- Cost: \$100–\$300/month

Stage 3: Integrated Operations Platform (Year 2+)

- Dispatch + billing + fleet management + analytics in single platform
- Automated KPI dashboards
- Real-time alerts for problems
- Cost: \$300–\$800/month

Stage 4: Custom Analytics & Business Intelligence (Year 3+)

- Advanced reporting and predictive analytics
- Integration with accounting, payroll, insurance systems
- Automated compliance tracking
- Cost: \$500–\$2,000/month (or custom development)

What Automation Enables:

Real-time visibility:

- See current location and status of all vehicles and drivers
- Receive instant alerts when driver is running late
- Monitor completion rates and revenue throughout the day

Proactive problem detection:

- System flags documentation errors before claim submission
- Alerts when vehicle maintenance is due in 500 miles
- Notifies when driver license expiration is 30 days away

Trend analysis:

- Historical performance comparisons (this month vs. last year)
- Predictive modeling (forecasted revenue based on current trends)
- Profitability analysis by broker, trip type, service area

Operational efficiency:

- Optimized route planning reduces deadhead miles 20–30%
- Automated billing claim generation saves 5–10 hours/week
- Integrated payroll reduces manual data entry errors

Common Software Implementation Mistakes:

Mistake: Buying expensive software before understanding what to track

Fix: Use manual system first to learn what metrics matter

Mistake: Implementing multiple systems simultaneously

Fix: One system at a time, 60–90 day adoption period

Mistake: Expecting software to fix operational problems

Fix: Fix processes first, then automate good processes

Mistake: Not training staff properly

Fix: Invest in training, create SOPs, require adoption

If you want operational systems:

NEMT Decoded™ is our comprehensive operations framework designed for NEMT entrepreneurs who want to transition from reactive chaos to proactive systems.

Inside, you will find dispatch optimization workflows that reduce deadhead miles, driver management systems that maintain 95%+ on-time rates, compliance tracking frameworks that prevent audit failures, and financial models that show you exactly when to invest in automation.

For now, use this tracker.

Print it. Complete it daily. Review it weekly. Use the data to make better decisions. The companies that scale profitably are those that built disciplined tracking habits when they were small.

Tracking does not guarantee success. But operating without tracking guarantees eventual failure.

Nemiton

Where NEMT Entrepreneurs Come to Build Empires