

END OF YEAR REPORTING

2020

Here's where all of your efforts are going to land, in your year end reports and numbers. By reviewing your reports you can accurately plan for next year, discuss as a team any challenges you've encountered this year in meeting your goals, and celebrate a year of hard work, success and teamwork!

Here is the checklist of all reports that need to be processed and reviewed to set yourself up for success again next year! Your practice management software should be able to pull up these reports easily.

Spend some time reviewing these metrics with the doctor, manager, and/or rest of the team. Compare these numbers from year to year and look for trends. Take note of areas that have improved from last year and create plans to increase areas that have not improved.

Did you meet your goals for this year?
What worked really well for the practice in 2020?
What would you do differently next year?
What are your goals for 2021?
Notes:

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Reports	2018	2019	2020
Annual Total Production			
Annual Production Per Provider			
Average Hourly Production			
Annual Collections			
Annual Collections Per Provider			
Number of New Patients			
Production By Category			
Adjustment Report			
Insurance Aging			
Account Aging			
Number of Patients Who Have Left the Practice			
Referral Report			
Unfilled Appointment Time			
Number of Missed Appointments Not Reappointed			
Production Lost from Missed Appointments			