

END OF MONTH REPORTING FOR MONTH:

Keeping track of business metrics is essential in knowing how the business is performing. At the end of each month, we will ask you to use your practice management software to obtain certain metrics. We will also always ask for a 3 year comparison to allow you to see the trends over time.

Production: The amount that has been charged out in a given time.

Collection: The amount that has been collected in a given time.

of New Patients: Add up the number of new patients seen in a given time.

of Deserters: The number of patients who have left the practice in a given time.

of Hygiene No Shows: Add up the total number of Hygiene patients who no showed in a given time.

Hygiene Attendance Rate %: Determine the Hygiene Attendance Rate by dividing the number of hygiene patients who came to their scheduled appointment by the number who were actually scheduled. So, if you had 100 hygiene patients scheduled, but 10 were no shows, then you would divide 90 by 100 to get 90% attendance.

of Treatment No Shows: Add up the total number of Treatment patients who no showed in a given time.

Treatment Attendance Rate %: Determine the Treatment Attendance Rate by dividing the number of treatment patients who came to their scheduled appointment by the number who were actually scheduled. So, if you had 100 treatment patients scheduled, but 10 were no shows, then you would divide 90 by 100 to get 90% attendance.

of New Patient No Shows: Add up the total number of New Patients who no showed in a given time.

New Patient Attendance Rate %: Determine the New Patient Attendance Rate by dividing the number of treatment patients who came to their scheduled appointment by the number who were actually scheduled. So, if you had 100 New Patients scheduled, but 10 were no shows, then you would divide 90 by 100 to get 90% attendance.

of Past Due Recare that haven't been seen: Run a past due recare report and indicate the number of patients who have not been in. This will give you some indication of your practice attrition.

Aging Accounts

Aging reports will allow you to see balances due over a given time. Run an aging report and track the monies owed to your practice. The trends in these numbers will allow your practice to see how much is outstanding and if the business is working hard to collect or letting accounts linger.

Total Amount Currently Due to Office Between Patients and Insurance: This will allow the practice to see at a quick glance how much is due overall.

Total Amount of Undone Treatment for this Month: Run a report of treatment plans that have been created this month and indicate the amount that has yet to be scheduled.

END OF MONTH REPORTING A THREE YEAR COMPARISON FOR MONTH:

Metric	2018	2019	2020	What is the percentage of increase or decrease from last year to this year?
Production				
Collections				
# of New Patients				
# of Patients who have left the practice				
# of Hygiene No Shows				
Hygiene Attendance Rate %				
# of Treatment No Shows				
Treatment Attendance Rate %				
# of New Patient No Shows				
New Patient Attendance Rate %				
# of Past Due Recare that haven't been seen				
Aging Accounts	Patient Portion Due		Insurance Portion Due	
0-30 Days				
31-60 Days				
61-90 Days				
Over 90 Days				
Total amount currently due to office between patients and insurance				
Total amount of undone treatment for this month				
Number of statements sent this month				
Notes				