



## Practice Stats Worksheet

Use this worksheet to compile your necessary data to complete your analysis.

We suggest that you delegate this compilation to your office manager and make it part of their regular monthly duties. The time frame for this data should correspond to the same period covered by your profit and loss statement. Tracking your data is a valuable habit. This compilation will be the most difficult the first time you do it. As you gather this data each month, this task will become much easier. If there is a statistic your OM cannot find, leave it blank. If necessary we can provide artificial values initially until we can determine true values.

Office Name  Doctor Name  Doctor Phone#

This worksheet covers the period from  to

**Gross Production.** How much did the practice produce over the chosen time period

Gross Production

**Net Production.** This is the total production over the chosen time period based on what insurance will allow. In PPO's and discount plans, the fee is reduced from your usual, standard, customary fee schedule. Your office may not track gross versus net production. If not, this amount will be the same as gross production

Net Production

**Collection.** This is what the office collected in gross revenue after refunding any patient or insurance reimbursement during the chosen time period

Collection

**Doctor Days.** How many hours seeing patients does the doctor average per week?  
Your answer may include partial hours, such as 32.75 hours a week

Doctor Hours per week

**Doctor Production.** What was the Doctor's gross production for the chosen time period? Do not include hygiene or any associate production

Doctor Production

**Hygiene Days.** What is the total number of hygiene days for this chosen time period?  
This answer may be a decimal to account for partial days

Hygiene Days

**Hygiene Production.** What was the hygiene department's gross production for the chosen time period?

Hygiene Production



**Associate Days.** How many days did the Associate (or Associates) work during the given time period? If no Associate, place a "0" in the box

**Associate Days**

**Associate Production.** What was the total gross production for the Associate over the chosen time period? If no Associate dentist, place a "0" in the box

**Associate Production**

**Unaccepted Treatment Plans.** These are presented but unaccepted treatment by patients. Your software should track this data if you have treatment plan capacity. Place the total value of unaccepted treatment for the chosen time period

**Unaccepted Treatment**

**Accounts Receivable Aging Report.** Run a current A/R aging report and fill in the boxes below.

**Accounts Receivable**

**Current**

**31-60 Days**

**61-90 Days**

**Over 90 Days**

**A/R, Insurance**

**Total New Patients.** How many new patients were seen by the practice over the time period?

**Total New Patients**

**New Patients Resulting from Advertising.** Hopefully you track where your new patients are coming from. If not, start using the *Practice Hawk* program

**New Patients, Advertising**

**Production from New Patients Resulting from Advertising.** This may be difficult to determine depending on your software. If you cannot track this statistic, take the number of new patients resulting from advertising in the chosen time period multiplied by \$500

**Production, New Patients from Advertising**

**New Patients Resulting from Patient Referral.** If you track the source of new patients, enter the number of new patients for the chosen time period that resulted from patient referrals. If you do not track this statistic, go over the new patient list and determine which ones were referred into the practice. In the future, use *Practice Hawk* to determine this number

**New Patients from Patient Referrals**



**Production from New Patient Referrals.** Record the Production from patients that were referred by your patients into the practice. If this information is not available, take the number of referral patients for the given time period times \$1,000 and place that value in the box.

Production, New Patients from Referrals

**Recall Visits.** Record the number of recall visits for the chosen time period.

Recall Visits

**Average Number of Patient Visits per Day.** Look at the schedule for the given time period and determine the average number of patient visits for Doctor, Hygiene, and Associate Dentist (if applicable). This doesn't need to be counted-just give an estimate

Average visits per Day, Dentist

Average visits per Day, Hygiene

Average visits per Day, Associate (is applicable)

**Fee Schedule.** Record your standard fee for the following procedures

BWX (4)

Initial Exam

FMX

Prophy

2 Surf. Post. Composite

PFM, Semi-Precious

Premolar RCT

S/RP, 1 Quadrant

**Gross Production by Category.** What percentage do each of these categories account for in your practice? Your software should have a report that summarizes this information for your given time period.

**Note-some softwares include crowns in the restorative category. Make an estimate of percentage of restorative verses percentage of crown and bridge**

Crown and Bridge

Restorative

Exams

X-rays

Prophy

Perio

Endo

Oral Surgery

Ortho

Removable Prosthetics



**Tracking by Dental Code.** Enter the number of patients that were entered under the following codes for the date range

1110 Adult Prophy	<input type="text"/>
4341 S/RP, 1 Quad	<input type="text"/>
4341 S/RP ,1-3 Teeth	<input type="text"/>
4910 Perio Maintenance	<input type="text"/>

**The following questions are to be answered by the Doctor.**

Average Lab Fee, PFM

The remaining categories are subjective. Please rate your passion for clinical dentistry and how your practice is being managed

**Comfort Level**

(1 to 10; 1=Extremely Low, 2=Very Low, 3=Low, 4=Medium Low, 5=Medium, 6=Medium High, 7=Moderately High, 8=Very high, 9= Very High, 10=Extremely High)

(write in description, not number)

Passion for Clinical Dentistry	<input type="text"/>
Practice Management	<input type="text"/>
Marketing	<input type="text"/>
Staff Proficiency	<input type="text"/>
Practice Stress is managed well	<input type="text"/>
1=absolutely not, 10=yes, very well	
Overall Career Satisfaction	<input type="text"/>