

# Business Monitor By Departments

1. Personnel Department
  - a. Personal-successes-and-events-sharing time
  - b. Work schedule, vacation, holidays, continuing education courses, etc.
  - c. Training -- new team members, OSHA, continuing education programs
  - d. Staffing needs
  - e. Teamwork -- status, needs, activities
2. Financial Department
  - a. Income comparison by actual \$'s or by % of increase or decrease over last month or year to date: last year to date
    - Production this month to last month; YTD to last YTD
    - Collections this month to last month; YTD to last YTD
  - b. % of collections to production (to calculate: divide collections by production for same period)
  - c. Sources of payments
    - Cash/checks over the counter -- % of collections (goal 40 - 50%)
    - Bank card payments (monitor charge card use)
    - Insurance
      1. Number claims filed
      2. Amount filed; amount paid; % of collections
      3. New carriers (employers providing dental insurance or direct reimbursement)
      4. Problems collecting claims from carriers
      5. Patient feedback; complaints; comments
    - Managed care, welfare -- % of collections
  - d. Write offs
    - Managed care; welfare
    - Bank card costs
    - Charity
    - Courtesy discounts
    - Bankruptcy
    - Bad debt
  - e. Billing date; number of statements mailed
  - f. Accounts receivable; total and aged categories: current, 30 days, 60 days, 90 days, 120 days; in collections
  - g. Accounts payable
  - h. Budget reconciliation & update, priority needs for cash outlay
3. Scheduling Department
  - a. # of days worked; # of hours worked
  - b. # appointments scheduled; # seen; % show rate for treatment and hygiene  
(to calculate: divide # seen as appointed by # appointed for same period)
  - c. # broken appointments; # rescheduled
  - d. Daily production goal; actual average daily production
  - e. Daily collection goal; actual average daily collection
  - f. Chart audit: # active patients; # made inactive and reasons
4. Restorative Department
  - a. # of treatment appointments
  - b. % show rate
  - c. % treatment scheduled of treatment diagnosed (treatment scheduled divided by treatment recommended)
  - d. Production -- \$\_\_\_\_\_ ; treatment is \_\_\_\_\_% of total production
  - e. Top five fee producing procedures
  - f. Lab cases -- any problems? successes?
  - g. Inventory -- control? problems? costs?
5. Hygiene Department
  - a. # recare appointments; # needed to meet minimum 80% effectiveness goal
  - b. % show rate
  - c. Analysis of appointments -- 3 month, 6 month, perio, home care, etc.
  - d. Production -- \_\_\_\_\_ ; hygiene is \_\_\_\_\_% of total production
6. Marketing Department
  - a. # of new patients this month; this month last year; YTD; last YTD
  - b. # of patients inactivated.
  - c. Paperwork -- charts, forms, letters, etc.; use; processing; changes needed
  - d. # and type of community contacts; referral thank you's; other contacts
  - e. Report on past and future marketing activities, costs, dates, successes, failures.
  - f. Analysis of compliments and complaints from or about patients; from or about suppliers; etc.