

Practice Management Reports

Reviewing your production daily will help prevent End of Month Issues.

Report Type	Benchmark	Frequency
The Daysheet Review production by provider for goal setting and accountability.	Production at 100% of practice goal.	Daily
Accounts Receivable Review "buckets" 30/60/90 day. create action plan for 90 day accounts.	Total AR less than 1 month adjusted production	Weekly
Claims Aging Follow up with all pending claims. Best practice bill and collect electronically.	Less than 5% of claims pending past 30 days	Weekly
No-shows and cancellations Review scheduling, confirmation, communication, and financial protocols. Use for patient follow up.	Less than 1% of appointments	Daily
Unscheduled Treatment Follow up with all unscheduled treatment. Identify why patients aren't accepting treatment.	75% of treatment plans scheduled	Weekly
Recall retention Follow up with unscheduled patients. Identify why patients aren't scheduling recall appointments.	65% of active patients scheduled to return	Weekly
New patients (booked vs. opportunity) Review new patient phone scripting. Track calls received vs. booked to identify opportunities.	NA – Just get the patients in when they call. Say YES!	Monthly
Patient referral report Use for marketing ROI. Review alongside NP booked vs. opportunity to identify weaknesses.	NA - Ask how and record what drove patients to your practice.	Monthly