

Monthly OM KPI Reporting/ Meeting Plan

- M-T-D Production for last month \$ _____ / Goal: \$ _____ Difference \$ _____ +/-
- M-T-D Collections for last month \$ _____ / Goal: \$ _____ Difference \$ _____ +/-
- New Patient totals for last month: _____ / Goal _____
- WINS: _____
- Case acceptance for last month: _____ / Goal 85%
- Reappointment percentage for last month: _____ / Goal 95%
- How many holes in hygiene for the month? _____ (30 minute increments)
- How many holes in Doctor schedule for the month? _____ (30 minute increments)
- Trends noticed for the month:
 - Billing: _____
 - Insurance plans downgraded: _____
 - AR: _____
 - Patient flow: _____
 - Employees: _____
 - Write-offs?: _____
- Billing:
 - Patient AR:
 - Current: \$ _____
 - 30 days: \$ _____
 - 60 days: \$ _____
 - 90 days: \$ _____
 - Over 90 days: \$ _____
 - Insurance AR:
 - Current: \$ _____
 - 30 days: \$ _____

- 60 days: \$ _____
 - 90 days: \$ _____
 - Over 90 days: \$ _____
- Total of unsent claims: _____
- Total of claims re-submitted: _____
- Overdue claims within last 3 months: _____
- Total number of patients on payment plans: _____
- Hygiene department review:
 - What is going well: _____
 - Areas of concern: _____
 - What is a growth goal for this department: _____
- Clinical department review:
 - What is going well: _____
 - Areas of concern: _____
 - What is a growth goal for this department: _____
- Front office department review:
 - What is going well: _____
 - Areas of concern: _____
 - What is a growth goal for this department: _____
- Office Manager review:
 - What is going well: _____
 - Areas of concern: _____
 - What is a growth goal for this position: _____
- Marketing ROI for this month:
 - What was the plan? _____
 - New patients seen from this plan: _____

Based on KPIs- what are three growth goals to implement:

1. _____
2. _____
3. _____

