

# OrthoTrac Practice Management Software

## Instructions for Bentson Clark & Copple Operational Statistics

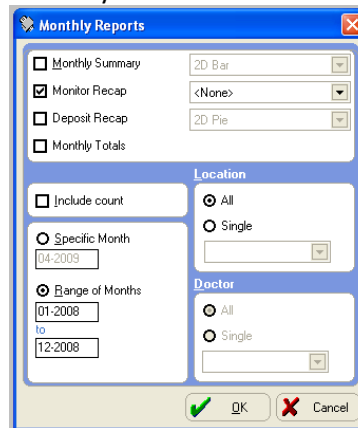
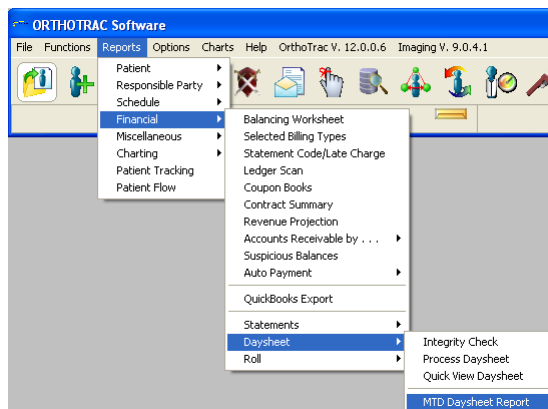
### Yearly doctor hours/days worked

You can look at the days on the schedule in the past and calculate these numbers.

The following are pulled from MTD Daysheet Report (depending on how the practice has configured)

- Annual Practice Production
- Annual Collections, Net
- New patient exams
- Case starts
  - Phase I or Limited
  - Phase II
  - Comprehensive

Run the following report and go to the end for the totals for the year.



	Gross Production	Production Adjustments	Net Production	Gross Collections	Collection Adjustments	Net Collections	Net Prod - Net Coll	New Contracts
<b>All Daysheet</b>	472,189.05	-49,650.00	422,539.05	-375,185.92	13,927.73	-361,258.19	61,280.86	(217)450,402.81

THURSDAY, APRIL 10, 2009 03:00 PM

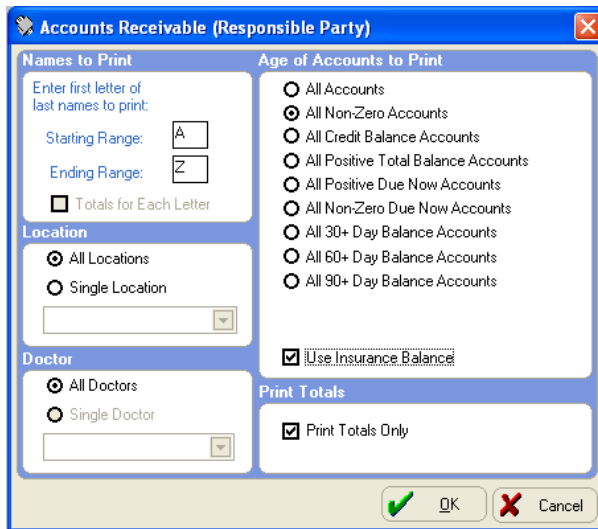
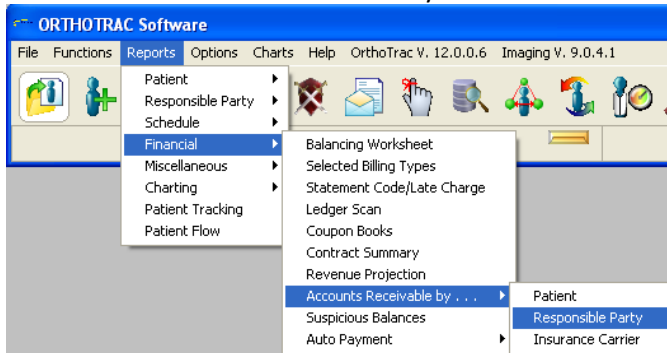
### Financial Daysheet

Monitor Recap January, 2008 through December, 2008  
All Locations - All Doctors

	New Pt Exams	Full Tx Starts	Phase I Starts	Phase II Starts	Debands	Diagnostic Records	Consultations	Repairs
<b>All Procedure</b>	(200)0.00	0.00	0.00	0.00	0.00	565.00	55.00	150.00

The following are pulled from the Accounts Receivable by....

- Contract receivable (C/R)
- Accounts receivable, gross
- Accounts receivable >60 days



**ACCOUNTS RECEIVABLE (RESPONSIBLE PARTY) - ALL NON-ZERO ACCOUNTS**

	TOTAL BALANCE	CURRENT DUE	THIS MONTH	31-60 DAYS	61-90 DAYS	91+ DAYS	TOTAL PAST DUE
LAST NAMES FROM A TO Z							
ALL LOCATIONS							
ALL DOCTORS							
TOTALS ONLY							
ALL NON-ZERO ACCOUNTS							
INSURANCE BALANCE USED IN DETERMINING ACCOUNTS TO PRINT							
<b>REPORT TOTALS FOR NON-ZERO ACCOUNTS:</b>							
<b>PATIENTS:</b>	307,212.18						
<b>INSURANCE CARRIERS:</b>	47,253.17						
	<b>354,465.35</b>						
<b>ACCOUNTS READ:</b>	271						
<b>TOTALS FOR PATIENTS:</b>	307,212.18	66,426.58	39,310.86	16,320.47	6,587.25	4,208.00	27,115.72
<b>TOTALS FOR INSURANCE CARRIERS:</b>	47,253.17	16,783.60	8,403.53	2,483.36	3,106.59	2,290.12	7,880.07
<b>COMBINED TOTALS:</b>	354,465.35	83,210.18	47,714.39	18,803.83	9,693.84	6,498.12	34,995.79
		100.00%	57.34%	22.60%	11.65%	7.81%	
<b>NUMBER OF ACCOUNTS REPORTED:</b>	271		246	146	82	59	164
	100%		90.77%	53.87%	30.26%	21.77%	60.52%

Note: Percentages may not total 100% due to rounding. The Past Due and Current (0-30) totals may not equal the Due total if it contains credit balances.  
Total Past Due represents accounts with an amount in 31-60 days, 61-90 days and/or 91+ days.

All A/R calculations are as of "right now"

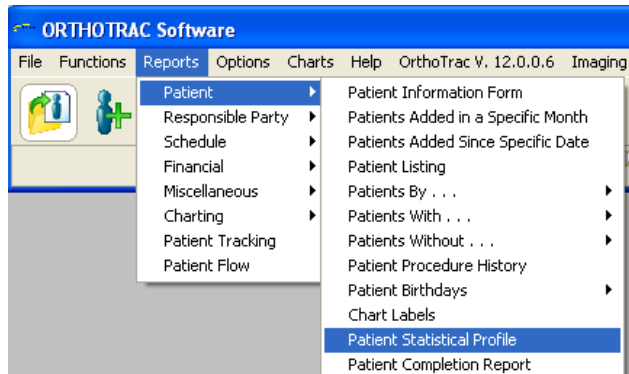
Contract receivable (C/R) is combined totals/total balance less current due

Accounts receivable, gross is combined totals/total balance

Accounts receivable >60 days is combined totals/31-60 days, 61-90 days and 91+ days totaled

**The following are pulled from the Statistical Profile**

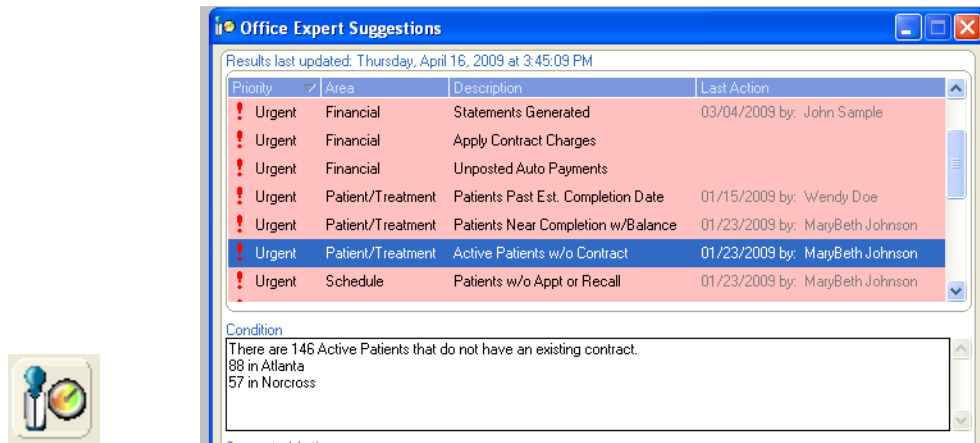
- Active Patients
  - Phase I or Limited Tx
  - Phase II
  - Comprehensive (may have to combined status’)
- Patients on recall status
- Patients in retention



STATUS	Number	Percent
Lhavail	5	0.26
Diagnostic Rec	19	1.01
Inactive	662	35.08
NP Complete	6	0.32
New Patient	132	7.00
Observation	264	13.99
Pending	138	7.31
Phase I Ret	76	4.03
Ref-Consult	3	0.16
Retention	232	12.29
Tx Suspended	7	0.37
Tx- Full	269	14.26
Tx- Limited	4	0.21
Tx- Lingual	2	0.11
Tx- Phase I	36	1.91
Tx- Phase II	25	1.32
Tx- TMI	2	0.11
Tx-Orthognathic	3	0.16
Whitening Only	2	0.11
<b>Total:</b>	<b>1,887</b>	

**Active Patients Paid in Full**

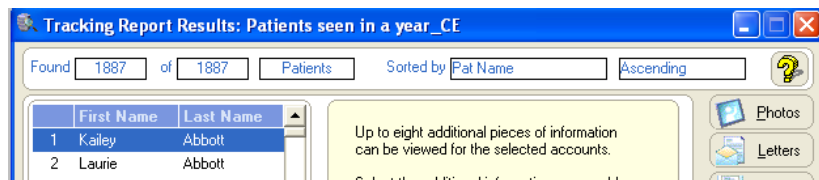
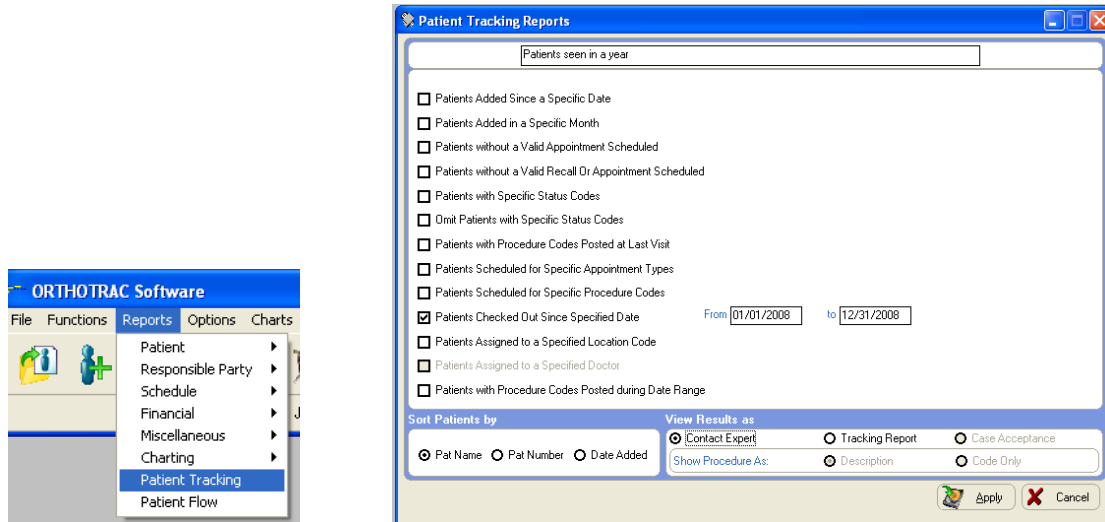
Select Office Expert on Main Menu and then look for Active Patients w/o Contract – select this item and totals are displayed in Condition box



**NOTE:** Be sure you have defined active patients in Office Expert Setup. You may want to print the details on these patients by selecting **Detail** and then include on the report **Pt Comb LPay Date** and **Pt Comb LPay Amt**. This will help you determine which of these patients paid in full.

## Average Number of Patients Seen per Day

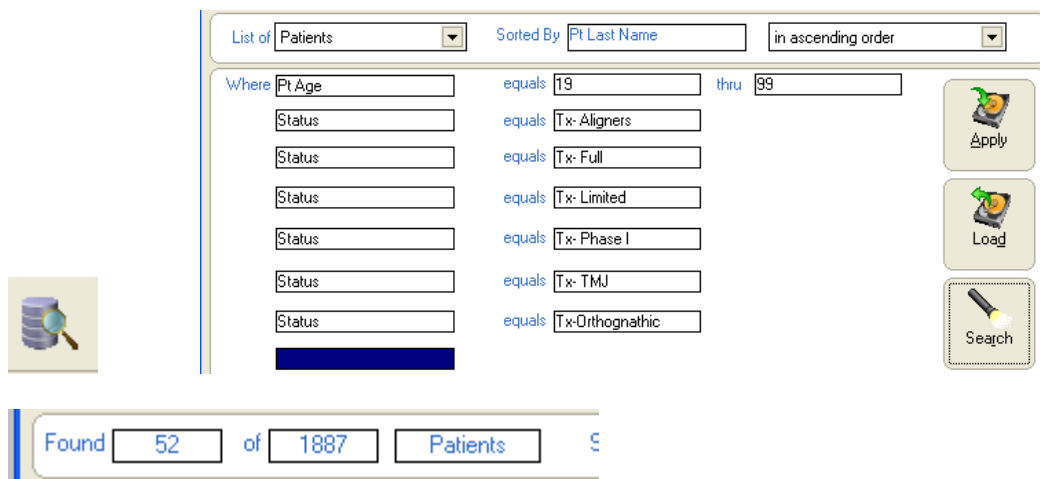
Add a patient tracking report for patients seen in a year and view results in Contact Expert report



Take the total found and divide by the number of days worked.

## % Adult patients in active treatment

If the office uses a different status for adult patients you can get this from the statistical profile. If not run a contact expert report selecting the age range for adults and all active status' that could have adults.



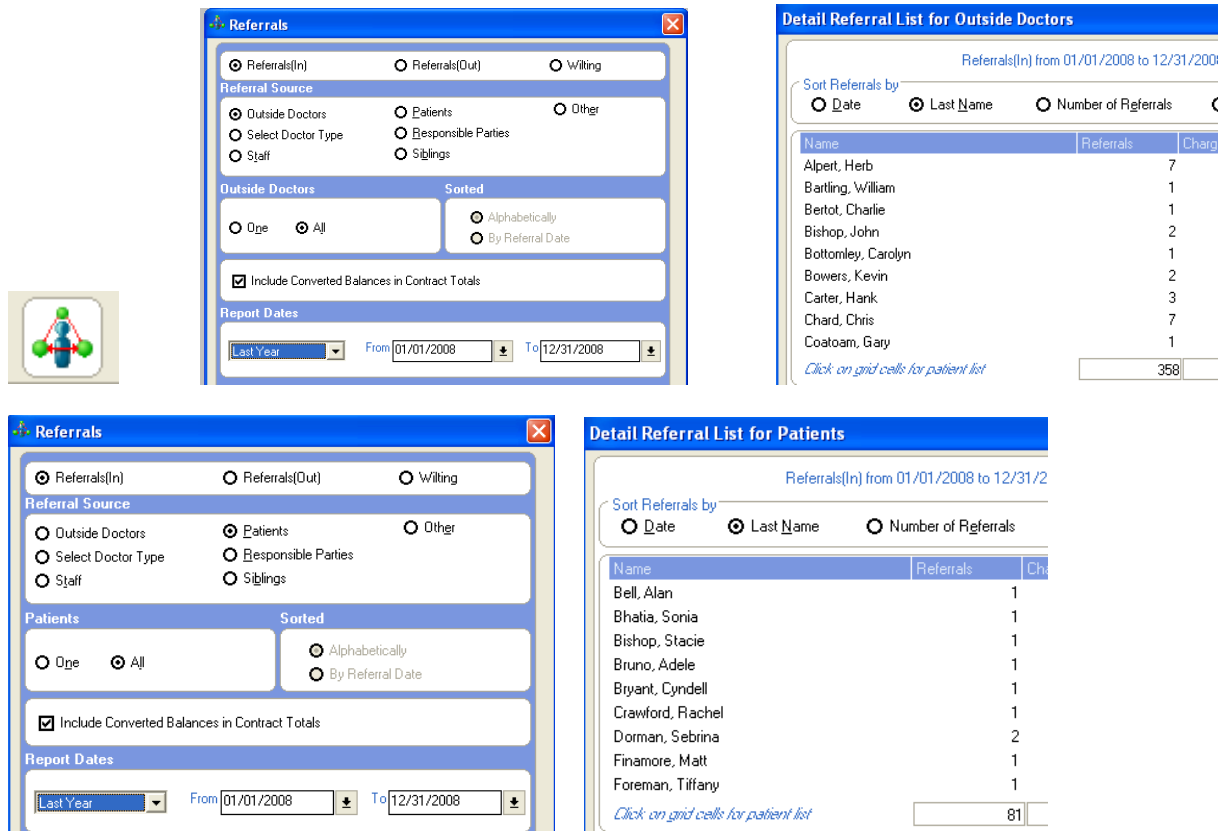
You will then use the number found to calculate the percentage.

## Referral numbers

- Percent dentist referrals
- Percent patient referrals (Patients, Responsible Parties, Siblings)
- Percent other referrals (Other & Staff)

You will need to run reports for each type of Referrals(In) for the year.

**NOTE:** Combine the referrals for Patients, Responsible Parties, and Siblings to calculate percentages for patient referrals and other and staff for other referrals.



The screenshot displays two windows from the Referrals software. The left window is the main 'Referrals' filter screen, and the right window shows the 'Detail Referral List for Outside Doctors'.

**Referrals Filter Settings:**

- Referral Type:  Referrals(In),  Referrals(Out),  W/ling
- Referral Source:  Outside Doctors,  Patients,  Other,  Select Doctor Type,  Responsible Parties,  Staff,  Siblings
- Outside Doctors:  One,  All
- Sorted:  Alphabetically,  By Referral Date
- Include Converted Balances in Contract Totals
- Report Dates: From 01/01/2008 To 12/31/2008

**Detail Referral List for Outside Doctors:**

Name	Referrals	Charge
Alpert, Herb	7	
Bartling, William	1	
Bertot, Charlie	1	
Bishop, John	2	
Bottomley, Carolyn	1	
Bowers, Kevin	2	
Carter, Hank	3	
Chard, Chris	7	
Coatoan, Gary	1	
<b>Total</b>	<b>358</b>	

*Click on grid cells for patient list*

**Detail Referral List for Patients:**

Name	Referrals	Charge
Bell, Alan	1	
Bhatia, Sonia	1	
Bishop, Stacie	1	
Bruno, Adele	1	
Bryant, Cyndell	1	
Crawford, Rachel	1	
Dorman, Sebrina	2	
Finamore, Matt	1	
Foreman, Tiffany	1	
<b>Total</b>	<b>81</b>	

*Click on grid cells for patient list*

## Average comprehensive treatment fee/time

- Adolescent
- Adult
- Phase I
- Phase II

Run a patient tracking report for all start procedure codes for a date range, sort by status and view the results in a case acceptance report. You will have to calculate for each type of treatment. You can use this report to calculate treatment time.

John D Sample  
Vorcross

Thursday, April 16, 2009 04:35 PM

**Recent Bandings\_CE\_CA**  
Case Acceptance Monitor (sorted by Status)

Name	Status	Procedure	Proc Date	Band Date	Est Comp Dt	Age	Loc	Doc	Asst	Last Visit
Courtney Freebush	Phase I Ret	Start Phase I T	06/07/2008			11 yrs	Atlanta	J. Sample		01/03/2009 / Records
<b>Resp/Ins</b>	<b>Risk</b>	<b>Cnt Amt</b>	<b>Init Fee</b>	<b>Type</b>	<b># of Pay/Amt</b>	<b>Appts</b>	<b>Appt Type</b>	<b>Recall</b>	<b>Recall Type</b>	<b>Dentist</b> <b>Referral Source</b>
										L. Zambrano D.    L. Zambrano / Outs
Cortney Bernard	Tx- Full	Full Bond	07/26/2008	07/26/2008	07/26/2010	18 yrs	Atlanta	J. Sample		10/08/2008 / Adjustment 10 min.
<b>Resp/Ins</b>	<b>Risk</b>	<b>Cnt Amt</b>	<b>Init Fee</b>	<b>Type</b>	<b># of Pay/Amt</b>	<b>Appts</b>	<b>Appt Type</b>	<b>Recall</b>	<b>Recall Type</b>	<b>Dentist</b> <b>Referral Source</b>
E Nelson-Bernard	C	4,280.00	800.00	MC	22 / 159.00			05/15/2008	NSHW	R. Zullo DDS
								05/13/2008	NSHW	
Lisa Boodhoo	Tx- Full	Start, Full Tx	07/02/2008	07/02/2008	07/02/2010	25 yrs	Atlanta	J. Sample		11/21/2008 / NDQC
<b>Resp/Ins</b>	<b>Risk</b>	<b>Cnt Amt</b>	<b>Init Fee</b>	<b>Type</b>	<b># of Pay/Amt</b>	<b>Appts</b>	<b>Appt Type</b>	<b>Recall</b>	<b>Recall Type</b>	<b>Dentist</b> <b>Referral Source</b>
L Boodhoo		3,160.00	500.00	MC	24 / 132.00					D. Goodall DDS    ADP Insurance List
Kevin Bower	Tx- Full	Full Bond	06/20/2008	06/20/2008	06/20/2009	17 yrs	Atlanta	J. Sample		12/05/2008 / NDQC
<b>Resp/Ins</b>	<b>Risk</b>	<b>Cnt Amt</b>	<b>Init Fee</b>	<b>Type</b>	<b># of Pay/Amt</b>	<b>Appts</b>	<b>Appt Type</b>	<b>Recall</b>	<b>Recall Type</b>	<b>Dentist</b> <b>Referral Source</b>
S Bower		1,500.00	500.00	MC	12 / 84.00					B. Smith D.M.D.    D Wier / Other/Ind
Guardian		654.00	0.00	QC	3 / 0.00					



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