

## Three levels

### 1. Track yourself - The Basic Necessities (\$49/month)

- A. New Patients
- B. Established New Condition
- C. Two-year+ New Condition
- D. Total visits/Day - PVA (Track no shows as well)
- E. Total Charges
- F. Total Adjusts
- G. Net Charges
- H. Total Income
- I. Front Desk Income
- J. Track number of days open
- K. Monthly Statistics generated showing summary for the following:
  - (1) PVA
  - (2) Write-off percentage
  - (3) Total Collection Percentage
- L. Stats translated into Global Sheets for simple year-to-year comparison

### 2. Silver Stats Level (\$89/month)

- A. New Patients
  - (1) Separated between morning and afternoon
- B. Established New Condition
  - (1) Separated between morning and afternoon
- C. Two-year+ New Condition
  - (1) Separated between morning and afternoon
- D. Total visits/Day PVA (Track no shows as well)
  - (1) Separated between morning and afternoon
- E. Total Charges
  - (1) Average Charge/Visit included
- F. Total Adjusts
  - (1) Average Adjustment/Visit included
- G. Net Charges
  - (1) Average Net Charge/Visit included
- H. Total Income
  - (1) Average Income/Visit included (AVV)
- I. Front Desk Income
  - (1) Average Front Desk Income/Visit included
- J. Track number of days open
- K. Monthly Statistics generated showing summary for the following:
  - (1) PVA
  - (2) Write-off percentage
  - (3) Total Collection Percentage
  - (4) Services per New Patient

- (5) Cash per New Patient
  - (6) Front Desk Collections per New Patient
- L. Separate Deposits Through MAIL Daily into:
  - (1) Cash
  - (2) Credit Card
  - (3) Patient Checks
  - (4) Insurance checks
  - (5) Attorney checks
- M. Separate Deposits Through FRONT DESK Daily into:
  - (1) Cash
  - (2) Credit Card
  - (3) Patient Checks
  - (4) Insurance checks
  - (5) Attorney checks
  - (6) Electronic Funds Transfer
- N. Stats translated into Global Sheets for simple year-to-year comparison
- O. Track profit/loss average per patient encounter (KELLY'S SHEET)

### **3. Growth - marketing metrics (\$149/month)**

- A. New Patients
  - (1) Separated between morning and afternoon
- B. Established New Condition
  - (1) Separated between morning and afternoon
- C. Two-year+ New Condition
  - (1) Separated between morning and afternoon
- D. Total visits/Day PVA (Track no shows as well)
  - (1) Separated between morning and afternoon
- E. Total Charges
  - (1) Average Charge/Visit included
- F. Total Adjusts
  - (1) Average Adjustment/Visit included
- G. Net Charges
  - (1) Average Net Charge/Visit included
- H. Total Income
  - (1) Average Income/Visit included (AVV)
- I. Front Desk Income
  - (7) Average Front Desk Income/Visit included
- J. Track number of days open
- K. Monthly Statistics generated showing summary for the following:
  - (1) PVA
  - (2) Write-off percentage
  - (3) Total Collection Percentage
  - (4) Services per New Patient
  - (5) Cash per New Patient
  - (6) Front Desk Collections per New Patient
- L. Separate Deposits Through MAIL Daily into:

- (1) Cash
  - (2) Credit Card
  - (3) Patient Checks
  - (4) Insurance checks
  - (5) Attorney checks
- M. Separate Deposits Through FRONT DESK Daily into:
- (1) Cash
  - (2) Credit Card
  - (3) Patient Checks
  - (4) Insurance checks
  - (5) Attorney checks
  - (6) Electronic Funds Transfer
- N. Stats translated into Global Sheets for simple year-to-year comparison
- O. Track profit/loss average per patient encounter (KELLY'S SHEET)
- P. Track New Patient Type Daily
- (1) Total Major Med Patients - New Patients
  - (2) Total PI Patients - New Patients
  - (3) Total Cash Patients - New Patients
- Q. Track Daily Patient Type Daily - Existing Patients
- (1) Total Major Med Visits for the day
  - (2) Total PI Patient Visits each day
  - (3) Total Cash Patient Visits each day
- R. In depth New Patient tracking
- (1) Which doctor got the most new patients
  - (2) Track the referral source for each new patient
  - (3) Track physician referrals
  - (4) Track Attorney referrals
  - (5) Track referrals from PPO, Ins. Companies, etc.
  - (6) Track referrals from office signs
  - (7) Track referrals from special events
  - (8) Track referrals from the internet
  - (9) Track referrals from Social Media
  - (10) Track referrals from Radio, TV, or Print efforts
  - (11) Track referrals from your website
  - (12) Separate all of these new patients into categories including
    - i. Cash
    - ii. Major Med
    - iii. PPO (In Network)
    - iv. Personal Injury Protection
    - v. Worker's Comp
    - vi. Professional Courtesy
    - vii. Medicare
    - viii. Medicare non-Covered
    - ix. Personal Injury Represented
    - x. Personal Injury Non-represented (3rd Party)
- S. Total Expenses Overhead (broken down into staff, rent, utilities, and misc.)

T. Total Patient Revenue (TPR) ) $TPR=PVA*AVV$

U. Number of new patients garnered per marketing plan (total number of new patients divided by the total amount billed) ( with an indicator that will measure AVV consultations.)

Need to also track:

Products sold per day/month/year

DME sold per day/month/year

Rental income per month/year

Leads: Consultations per day/month/year

Converted Leads: Consultations with follow up

True overhead insurance, fees, labor, rent, accountant, marketing, business expenses, taxes, repairs, bank, utilities, etc..

Talk to JD about pillars of a financially healthy business

Upwork -

Make a big spreadsheet with all stats tracked on it - combine separate stats into one

If you can measure it, you can improve upon it.

What does it cost to get each new patient?

What will the reports look like?

Have you ever had a doctor ask you how many patients you average per week?

Have you ever been asked which months are your slow months and didn't know the answer?

Have you been asked what your PVA is and, not only did you not know the answer, but you didn't even know what PVA meant?

Have you wondered if you grew by at least 10% this year?

Confidence. Control. Set Course

Compare

Challenge

Complete

Curation  
Comprehensive  
Catapult

Different ways to export reports. PDF, Word, Excel, CSV, etc...

**Ideas for Dashboard Metrics**

New Patients this month vs. Average per month + % growth/decline from last year

Total visits this month vs. Average per month + % growth/decline from last year

PVA average over last 3 months + % growth/decline from last year

Total Collections + % growth/decline vs. last year

Front Desk Collections + % growth/decline vs. last year