

Monitor Daily Activities—A Key to Control Your Practice

Many practice management experts recommend the dentist receive and review numbers monthly in order to review specifics of production, collections, scheduling, show rate for patients who keep appointments as made, processes to handle broken appointments, bank deposits, overhead costs, etc. Actually, the most profitable, well-run offices are monitored on a daily basis by which the dentist/owner/manager routinely receives a **Daily Activities Report**.

This report, given to the dentist at the end of each day, assures that four vitally important controls for the practice are in place and functioning well. (1) Scheduling, re-scheduling, and show rate for restorative and hygiene patients are meeting goals consistently. (2) Production and collection goals are achieved. (3) Business staff is accountable for routine processes that assure business procedures are consistent day-to-day and all collected monies are bank-deposited each day. (4) Problems are noticed and acted on while they are still minor and manageable.

Suggestion: monitor your practice on a daily basis by asking your business team leader to complete the following **Daily Activities Report** so that you, the doctor, receive the report at the end of each day along with the bank deposit and the computer-generated day sheet noting the name of each patient seen with treatment delivered.

Incidentally, if you dentists are groaning inwardly, asking “Do I really need to review such details daily?”; I’m telling you, “YES! YOU DO!” And that advice is based on over 35 years of consulting with hundreds of dental practices, uncovering every variety of management problem known to “dental-kind.” Believe me! Monitor your practice daily!

Edit this Report to meet your needs and preferences. Some clients prefer to receive the report early in the morning of the day following. Some omit the Bank deposit amount, instead simply getting the deposit at the end of each day in a bank bag, ready to be deposited. With electronic deposits and bill payments, the deposit is not nearly as laborious as it was. The Daily Activities Report, accompanied by the day sheet described above, is a necessary tool for control of the daily transactions in your office. Please use it consistently to preclude problems that might affect many aspects of your practice.

Daily Activities Report

Date: _____

Restorative

Patients scheduled _____
Patients seen _____
Show rate %, not including emergencies
(Divide # seen as appointed by # scheduled. Goal = 90%-95%) _____ %
Broken appointments _____
Rescheduled appointments _____

Hygiene

Patients scheduled _____
Patients seen _____
Show rate % (Goal = 90%-95%) _____ %
Broken appointments _____
Rescheduled appointments _____

Total patients seen _____

Overall show rate % _____ %

Total production (% Restorative _____ % Hygiene _____) \$ _____

Total Collections (Over-the-counter minimum goal = 40%-50% of production;
the remainder of collections come electronically or by mail) \$ _____

Collection % rate (Divide collections for a period by production for that
same period. Minimum annual goal = 97%) _____ %

Over/Under daily production goal \$ _____

Over/Under daily collection goal \$ _____

Adjustments/Write-offs \$ _____

Bank deposit \$ _____