



**Office Manager Monthly Practice Analysis**  
Data for the month of \_\_\_\_\_20\_\_\_\_

Date \_\_\_\_\_

Manager to present the following practice analysis:

- Number of new Patients Scheduled in March \_\_\_\_\_
- Goal met or exceeded Dr. Tooth \_\_\_\_\_
- Goal met or exceeded Hyg \_\_\_\_\_  
If not met - why \_\_\_\_\_  
\_\_\_\_\_
- Should goal be adjusted? \_\_\_\_\_
- Amount produced in March \_\_\_\_\_
- Amount collected in March \_\_\_\_\_
- Amount adjusted in March \_\_\_\_\_
- Collection percentage rate \_\_\_\_\_
- # of in house Plans \_\_\_\_\_
- Give an account of current aging status, 30, 60, 90 discuss any accounts that need to go to be discussed/collections/write off, etc. \_\_\_\_\_  
Pat. 0-30 \_\_\_\_\_ Ins. 0-30 \_\_\_\_\_  
Pat. 31-60 \_\_\_\_\_ Ins. 31-60 \_\_\_\_\_  
Pat. 61-90 \_\_\_\_\_ Ins. 61-90 \_\_\_\_\_
- Production amount currently scheduled for April \_\_\_\_\_
- Plan to make sure goal is met \_\_\_\_\_  
\_\_\_\_\_
- Office needs/wishes \_\_\_\_\_  
\_\_\_\_\_
- Office/team personnel Issues to be resolved \_\_\_\_\_  
\_\_\_\_\_
- Identify weaknesses in systems and action plan to resolve \_\_\_\_\_  
\_\_\_\_\_
- Celebrate wins \_\_\_\_\_  
\_\_\_\_\_