



INSTRUCTIONS FOR FILLING OUT YOUR REQUEST FOR INFORMATION INPUT SHEET

1. Office Totals:

- A. Office Production: The total charges from all scheduled producers in the office before the write-offs.
- B. Office Collections: The total gross amount of money collected for the month.
- C. Month-End Accounts Receivable: The money that is outstanding, owed by patients at the end of the billing period.
- D. Front Desk Collections
The amount of money that is collected at the front desk as a result of the 5 percent discount policy. If you are not currently keeping track of this, it would be worthwhile to keep track of money that is collected for work paid in full each month.
- E. Total Number Recall Exams (Code:120): Any time a patient is seen by the hygienist after the first visit, they are considered “recall.” Exclude Perio.
- F. Active Patient Count: Please count all the patients who have been in the practice in the last 18 months. (Example: July 1, 2014 to January 1, 2013) The computer software should be able to do this for you, if you have any problems please call your software provider. Please exclude patients who are in collections, MA, and account holders who are not patients.
- G. New Patients: A new patient is defined as anyone who requires a new chart. Do not count families; count individuals in each family. (Code 0150)
- H. Soft Tissue Production: (previously called Perio): The total soft tissue charges to patients made by the hygienists this year. (Code 4910, 4341, 4342)

2. Doctor's Information:

- A. Please provide the name of each doctor.
- B. Production: The total gross charges to patients who are directly attributable to each
- C. Hours Worked: The number of hours each doctor spent in the office with patients. Please do not count lunch; but if the doctor worked overtime, include that time.
- D. Patient Visits: Count the number of visits the doctor saw in his/her schedule for the month. **Do not include Hygiene checks**, only patients that the doctor saw in his or her schedule.
- E. Write-offs: If your practice has more than one doctor, this is the place to record each doctor's write-offs separately.
- F. Crown and Bridge: The total charges for crown and bridge that the doctor performed for the year. Please include all Implant Production as well. (Codes: 6010, 6199, 2740, 2920, 2954, 6245, 6548, 6899)
- G. More than 1 doctor
Please click on the arrow in the upper right hand corner, in the gray text box marked, "Add Additional Doctors", a dropdown menu will appear, you can type in the data for the other doctors.

3. Hygiene Information:

- A. Production: The total charges to patients who are directly attributable to each hygienist or assistant.
- B. Hours Worked: The number of hours each hygienist spent in the office with patients. Please do not count lunch; but if the hygienist worked overtime, include that time.
- C. Patient Visits: The total count of the number of visits the hygienist saw in his/her schedule for the month.

4. Profit & Loss Statement or Computer Software:

- A. Please add upload a copy of your P & L and include up to the latest whole month for 2021 and the full year of 2020.

If you have any questions please feel free to call White & Associates at 952-432-3322

Thanks!

