All those reports — do you read them?

By Pat Rosenzweig

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ne of the most important areas we discuss when evalu-
ating orthodontic software is reports. Does it run good reports? Does it give us all the reports we need? Is software “A” worth more than software “B” based on the quality of its reports? We have all these discussions and base our soft-
ware purchases heavily on answers we get, so one can only assume every orthodontist everywhere is diligently poring over daily, weekly, monthly and yearly reports.

Are you laughing yet?

I’ll bet many of you are because you know all those excellent reports just pile up on your desk and you rarely, if ever, glance at them. And, from a consultant’s view, I rarely, if ever, even glance at them. Just pile up on your desk and you know all those excellent reports monthly and yearly reports.

“The ship has already sailed.”

By referring dentist (Who should you be advertising or sending mailers?) or

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Next area to check is how many new patients you saw this month and how that compared to previ-
ous months and to the same month last year. You’ll always have slower months, but you don’t want to lose ground from last year. In conjunction with your number of new patients, a very important number to look at is the percentage of exams that actu-
ally became treatment starts. Once an office has been functioning for a year, any percentage less than 50 percent should be unacceptable — 75 to 80 percent is a realistic goal.

In the same vein, if you’re seeing plenty of recalls but not starting many cases, this warrants investiga-
tion. It may well be that many of the patients are still not ready to start, but it also could be that you’re doing a very cursory recall exam without the enthusiasm you showed at the initial exam. Recalls really are your “money in the bank,” and you want to be aware if they’re not returning for treatment.

End-of-month reports are great places to look at how many patients missed appointments and how many emer-
gencies you saw. These are both real wasters of productive time and need to be tracked carefully. One last number to review tells you how many days you worked this month and what your average daily production was. This is an impor-
tant and easy-to-track goal, and I would encourage you to set your templates so each day has a good mix of exams and production time. Finally, you have the end-of-year reports. These are a full capsule description of how the practice did this year. They’re what you need to study to prepare your plan for next year and to evaluate your growth. Where did you lag? That’s where you should be prepared to add marketing next year. When were you extremely busy? That’s probably not the best time to plan vacation. We can learn a lot from our experiences, but only if we pay attention to them.

These are the basic reports that you absolutely should review on a regular basis, but all the current software has so much more to offer that it’s a real waste to have spent all that money and use so little of its capabilities. You can track patients by ZIP code (Where should you be advertising or sending mailers?) or by referring dentist (Who should you be taking out for an afternoon of golf?). You can see how many patients and how much production is coming from your status as a pro-
vider for all your insurance compa-
nies — and decide when it’s time to drop the unproductive ones.

In a nutshell, you can track just about everything happening in the practice without ever leaving your desk, so go get those reports and start reading them!