PLEASE FILL OUT THE FORM BELOW. You can upload the form on our contact page.

Doctor/Practice Name Birth Date

Mailing Address Office Phone Number

Doctor’s Cell Number Email Address

Brief History of Career of Dr and/or Practice

Year Graduated from Dental School How Long at the Location

Your Practice Vision

How Did You Reach The Decision That You Wanted a Dental Consultant?

What Are Your Goals of Visions Dental Consultants?

What Practice Management Software Are You Currently Using? What version? Do you have a backup protocol?

Are Chair-side Computers Used Effectively?

Is The Entire team Cross-Trained in the Effective Use of Software for Making Appointments, Posting Payments, Sending Insurance Claims, and Generating Necessary Reports?

How Many Chairs? Doctor Chairs?

Hygiene Chairs? Consult Room?

Do

Do You Feel the Practice Is Patient Saturated and Needs an Associate; Does the Facility Have the Chair Space To Make This a Possibility?

What Are the Opportunities for Expansion in the Facilities, if Any?

Please List Your Provider Team’s Hours:

Dr’s Names/Schedule/Hours Dr’s Names/Schedule/Hours

Dr’s Names/Schedule/Hours Dr’s Names/Schedule/Hours

Hygienist Name/Schedule/Hours Hygienist Name/Schedule/Hours

Doctor and Hygiene Provider Productivity Report: (Total Amount produced Per Provider in the Last Twelve Months)

Provider/$ Provider/$

Provider/$ Provide/$

Provider/$ Provider/$

Total Gross Production Total Production Adjustments

Total Net Production Total Collected

Doctor Provided Schedule: Access to 2 Chairs Yet Scheduled Mostly in one Chair?

Is the Doctor(s) Always Scheduled in 2 Chairs Each Day?

Does the Appointment Book Reflect the Doctors and Assistant’s Time Utilization?

Does the Team Follow nay Scheduling Template for the Ideal Doctor’s Schedule Patterns?

Please Calculate in the last four Weeks: Total Units of Open Doctor Time.

Is the Open Time for the Doctor Negligible, Minimal, or Significant? Does Open Time in the Doctor’s Schedule Occur Because it was Never Scheduled, or Because of the Same Day Schedule Changes?

What Resource Does the Team Use to Recover Open Doctor Time?

Do You Have Associates in the Practice? How Many?

Has the Senior Doctor Determined which Patients will be Allocated to the Associates?

When the Associates Joined the Practice, was a new Assistant Assigned to Support the Associate?

Does the Associate Perform Recare Exams for an Established patient Base?

Hygiene Active Patient Base: #Total pre-scheduled for hygiene today and into the next 12 months.

# Future Due and Unscheduled today and into the next 12 months.

# Overdue and Unscheduled hygiene patients 0-6 months.

Hygiene Allocation-Does each hygienist have her/his own patient base?

Document Below the Number of Procedures Performed for each Individual Hygiene Codes below for the Last 12 Months.

D1110 D4910 D4342

D4341 D4355

How Long is the Typical Preventative Appointment?

What is the Scheduled Increment, 10 or 15 Minutes?

Describe the Steps the Practice uses to Contact Scheduled, Unscheduled and Overdue Patient in the Practice. For Example, how are Scheduled Hygiene Patients Contacted to Ensure they are Keeping their Appointments?

If you Mail Recare Cards, and you Contact your Patients via Email or Texts for Recare Appointments what is the Time Frame before the Appointment.

Is there an Assigned Person whose Job it is to Look After the Recare Process in the Practice?

 How Does the Practice Deal with Patients who Cancel or Delay Recare Visits?

How Many People Oversee or Manage the Hygiene Schedule?

What is the Usual Approach to Inactivating a Patient? Who does it, when, and based on what Criteria?

Please Calculate in the Last Four Week: Hygiene Hours Available? Hygiene Hours Open?

Is Open Time in the Future Hygiene Schedule Negligible, Minimal. or Significant?

Where are Most of the Hygiene Appointment Scheduled, Chairside or at the front desk?

What Resources does the Team use to Recover Open Hygiene Time?

Are Your Compute- Generated Treatment Plane Accurate?

How Does the Team Follow up on Patients’ who Delay, Decline or Cancel Doctor Appointments?

How Many New Patients Have You Seen Each Month Over the Last 6 Months?

How long is the New Patient’s First Appointment Scheduled for?

Briefly Describe Your New Patient Examination Process and Documentation. Is the New patient Schedule to See the Doctor or Hygienist First?

Are Existing Conditions Noted?

Are Treatment Plans Phased or put in Appointment Priority in the Computer?

Are patients Presented with a Printed Treatment Plan at the Conclusion of their visit?

What Documentation is presented to the Patient that Need Comprehensive Dentistry and what do they take Home?

Are Financing Options Available to Help Patients Finance their dental Needs?

Does the Practice have a Documented Financial Policy? Please Attach a Copy.

Does the Practice Calculate the Patients Portion for Each Visit, and Collect at the Time of the Visit?

How are Overdue Accounts Handled? Collection Protocol

Account Aging 0-30 Days $/ And % of Total AR’s

Account Aging 31-60 days $/and % of Total AR’s

Account aging 61-90 days$ and % of Total AR’s

Does the Practice Charge Interest on Overdue Accounts? Is there a Cancellation Charge, and does the Practice have Success in Collecting that amount?

Who Creates and Sends Statements? How often are Statements Sent Out?

Does the Team have Complete Confidence in Applying Insurance Payments Correctly? What Fee Schedule does the Practice follow-Insurance or UCR?

Do Patient Pre-pay for Large Cases Causing Credit Balances?

How Much do you Currently have in Patient Account Credits?

Does the Team Meet for Huddles? Both Front and Back Staff?

How does the Team Feel about the Huddles, do they Provide Focus, Education, and Opportunities to Discuss Patient Concerns or Scheduling Issues?

Do You Have Team Meetings

Are formal Job Description in Place? Are Performance Evaluations Held Regularly?

How Are New patients Tracked and How do you Acknowledge Referrals?

Is the New patient Flow Per Mont Sufficient?

Are you Using an Intra-oral camera as part of Your Recare and New Patient Exams?

Do you have SOP manuals for both Front Office and Back Office(clinical)?

* Please send me your P&L reports from January to December of the previous year and year to date of the current year.
* Print a procedure report for the last 12 months. I need to see the individual ADA codes and the number of procedures competed on each category.
* Please send you financial arrangement form you use for communicating out of pocket finances with your patients.
* If available send you delinquent AR report.
* I will need one month’s worth of schedules printed so that I can review how you schedule.