**Key Metrics for Engineered Case Acceptance**

**New Patients Call-in**: A potential patient who calls the office for the first time inquiring about the office, procedures, costs, scheduling and so forth. This would include a potential patient who responds via the Internet or walks into the office to inquire about being a patient. This person has not as yet been seen as a patient in the office. New patient call-in also includes a current or past patient who is calling to schedule a family member.

**New Patients Scheduled**: A new patient contact that is scheduled to come in for an appointment.

**New Patients Seen**: A patient that is seen in the office for the first time. This could be for hygiene, for a procedure, for an emergency or for a consult with the doctor. If a patient has been in the office before, and it has been more than three years since the last visit, he or she would count as a new patient.

**Dollar Value Treatment Presented:** The dollar value of treatment presented to a patient in writing. The total presented is the amount that would be paid by insurance plus the patient’s out of pocket costs, minus any discounts.

**Dollar Value Treatment Accepted:** The value is calculated based on the out of pocket and insurance portion total for the treatment plan that was accepted. For a treatment plan to be accepted, the patient must have signed the treatment plan and paid for his or her out of pocket in part or in full. If the patient accepted a phase or procedure, only the total amount of out of pocket and insurance portion for that phase or procedure would be counted as accepted.

**Treatment Closed %:** This is calculated by dividing the Dollar Value of Treatment Accepted by the Dollar Value of Treatment Presented. Software can automatically track this calculation.

**Treatment Closed Percentage:** The sum of dollars collected from all sources divided by the treatment presented value for a given period. For example: Treatment presented for the week: $86,482; collections for the week: $68,432. Treatment closed percentage: 79.12%. The software can automatically track this calculation.

**Collections/Income from all Sources**: Income deposited on any given day by check, cash, credit card or third-party financing.

**Hygiene Production**: The dollar value of production the hygienist produced. If a practice has more than one hygienist, this can be broken down by individual hygienists.

**Doctor Production**: The dollar value of production the doctor produced. This can be broken down by individual doctors if the practice has more than one.

**Total Production**: The dollar value of services delivered by the doctor and hygienists before write offs. The software can automatically calculate this by totaling doctor & hygiene Production.

Statistics to track in the Management by Stats software.

The stats that need to be tracked manually.

New Patient Calls

New Patients Scheduled.

$ Value of Treatment Presented

$ Value of Treatment Accepted

Stats that will be pulled from Practice Management software

New Patients Seen

Hygiene Production

Doctor Production

$ Collected

Stats that will be automatically calculated in Management by Statistics

New Patient Scheduling Efficiency %

Treatment Accepted %

Treatment Closed %

Total Production