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Things the practice owners should be regularly monitoring:

- ❑ Monthly Accounts Receivable / DSO – watch for trends that deviate from normal levels & use the reports to help you move toward targets
- ❑ Monthly (looking at quarterly data) Collection Rate - watch for trends that deviate from normal levels & use the reports to help you move toward targets
- ❑ Monthly Patient Visits – watch for trends that deviate from normal levels
- ❑ Monthly Utilization / Procedures Performed – especially for the more common procedures that you perform
- ❑ Monthly Service Production (Gross & Net) & Adjustments (paying particular attention to insurance adjustments, courtesy discounts, write-offs and uncategorized adjustments)
- ❑ Weekly (at first, then go to monthly) Optical Charges & Adjustments
- ❑ Weekly (at first, then go to monthly) Optical Inventory Adjustments
- ❑ Monthly Optical Inventory Orders – make sure that items are not being unnecessarily ordered and that the volume of items ordered correlate to the volume of items sold.