

# **EasyDent** Practice Analysis

**EasyDent** provides many different types of “Practice Analysis” reports. The document contains examples of how to run a few different analysis reports along with sample results.

Example Reports are:

1. Procedure Code breakdown based on production: *detailed* and *by category*.
2. View an entire year’s statistics on one page
3. Quickly compare this year to last year
4. Evaluate how well are you doing with recall for patient cleanings?
5. Patients overdue for recall for the most recent, 24-month period.  
(Output of this report can be used to send Recall Cards, Letters, Emails and/or Texts)
6. Where are your patients coming from? How much are they worth?
7. How much are new patients worth their first year with the practice?
8. Graphical overview of several practice statistics

**In addition:** you can create your own excel spread sheet of detailed ledger transactions for any date range as follows:

- From the Utility Menu select “*Advanced Utilities*”
- Then use the “*Export Transactions*” option

# 1. Procedure Code breakdown based on production: *Detailed and By Category*

- Select the Reports Menu "Monthly Reports" Option
- Set the desired date range on the top right-side
- On the right-hand side check the option "Procedure Code Analysis"
- Select the "Options" button to the right of "Procedure Code Analysis"
- Check "Select All - Ignore List of Numbers"
- Run the Report!

Family Dental Care		Procedure Analysis 01/01/2019-12/31/2019		
Thursday Jan 02, 2020				
ADA Code	Description	Number	Average \$	Total \$
210	Full Mouth Images	14	88.00	1,232.00
220	One Periapical Image	450	17.91	8,058.00
230	Add'l Periapical Image	337	16.98	5,723.00
240	Occlusal Image	6	23.00	138.00
270	Bitewing-single Image	8	17.00	136.00
272	Bitewing-two Images	90	34.00	3,060.00
273	Bitewing-three Images	4	41.00	164.00
274	Bitewing-four Images	1024	65.00	66,560.00
Subtotal				85,071.00 7.63%
330	Panoramic Image	523	110.00	57,530.00
Subtotal				57,530.00 5.16%
1110	Adult Prophyl	1776	90.00	159,840.00
1120	Child Prophyl	162	68.00	11,016.00
Subtotal				170,856.00 15.33%
2140	Amal 1 Surf Prim Or Perm	8	140.63	1,125.00
2150	Amal 2 Surf Prim Or Perm	9	175.00	1,575.00
2160	Amal 3 Surf Prim Or Perm	24	207.92	4,990.00
2161	Amal 4 Surf Prim Or Perm	12	241.25	2,895.00
Subtotal				10,585.00 0.95%

Family Dental Care		Procedure Analysis 01/01/2019-12/31/2019			
Thursday Jan 02, 2020					
-----					
ADA Category Summary Breakdown					
Category		Count	Average\$	Dollars	Percentage
Diagnostic	0000-0999	4735	51.85	245489.08	22.0%
Preventive	1000-1999	2085	83.38	173844.00	15.6%
Restorative	2000-2999	1269	371.44	471358.00	42.3%
Endodontics	3000-3999	35	703.63	24627.00	2.2%
Periodontics	4000-4999	309	247.24	76397.00	6.9%
Prost.Removable	5000-5899	83	688.62	57155.40	5.1%
Maxillofacial	5900-5999	1	220.00	220.00	.0%
Prost.Fixed	6000-6999	48	995.31	47775.00	4.3%
Oral Surgery	7000-7999	65	192.08	12485.00	1.1%
Orthodontics	8000-8999			0.00	.0%
Adjunctive	9000-9999	98	52.54	5149.00	.5%
Totals		8728		1114499.48	

## 2. View an entire year's Statistics on one page

- Select the Reports Menu "Monthly Reports" Option.
- On the right-hand side, check the option "Yearly Analysis"
- Select the "Options" button to the right of "Yearly Analysis"
- Check "Select All Patients Regardless of Insurance"
- Run the report!

Family Dental Care 12-28-2019													Page 1 10:36 AM YearToDate**
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Yearly Analysis 2019 (01012019 thru 12312019)													
Charges	30431	23512	23167	20364	24613	24098	28419	42122	28953	37362	30395	10689	324127
Adjustment	4596	1203	3980	1559	467	1925	1602	2694	6296	2689	2090	220	29321
Payments	19824	17254	31338	24273	20105	17267	31356	33792	26684	37226	28267	11656	299043
Net*	25836	22309	19187	18805	24146	22173	26817	39428	22656	34673	28305	10469	294805
-----													
PAYMENT BREAKDOWN													
Insurance	9870	8053	15510	9452	6262	6403	11008	4552	10793	7399	8391	5219	102913
Non Insur.	9954	9201	15829	14821	13844	10863	20348	29240	15891	29828	19875	6437	196130
NON INSURANCE PAYMENT BREAKDOWN													
Per. Check	2588	1081	3068	676	1701	100	2662	340	5181	4865	4050	0	26310
Cash	527	895	424	152	75	626	2318	182	503	812	0	222	6737
Charge	5522	6477	10948	12602	11942	10137	14568	25698	9880	19788	14724	5473	147760
Money Ord	0	0	0	0	0	0	0	0	0	0	0	0	0
Electronic	1317	748	1389	1391	125	803	799	3020	327	4363	1101	742	16126
PAYMENTS/COLLECTION (Adjustments not included)													
Recovery %	65.1%	73.4%	135.3%	119.2%	81.7%	71.7%	110.3%	80.2%	92.2%	99.6%	93.0%	109.0%	
YTD Rec. %	65.1%	68.7%	88.7%	95.1%	92.4%	89.0%	92.4%	90.1%	90.3%	91.5%	91.7%	92.3%	
New Patients	1	4	1	1	3	0	2	3	3	5	1	0	24
Adult Prophys	39	26	44	27	30	32	29	25	31	36	24	18	361
Child Prophys	1	3	3	4	1	3	3	0	2	4	0	0	24
Total Prophys	40	29	47	31	31	35	32	25	33	40	24	18	385
-----													
GRAND TOTALS Year To Date													
Payments	:	\$	299,043.15										
Adjustments	:	\$	29,321.11										
Net*	:	\$	294,805.47										
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Insurance	:	\$	102,913.04										
Ins Checks	:	\$	98,743.60										
Ins Chg Card	:	\$	3,366.24										
Ins ETF	:	\$	803.20										
Non-Insurance	:	\$	196,130.11										
Checks	:	\$	26,310.29										
Cash	:	\$	6,736.60										
Charge Card	:	\$	147,760.22										
Money Orders	:	\$	0.00										
Elec Non Ins	:	\$	15,323.00 (i.e. Care Credit)										

**3. Quickly compare this year to last year**

- From the Reports Menu, select "Monthly Reports"
- Select "Year to Date Practice Pulse"

Year To Date Practice Pulse Family Dental Care			
12-28-2019 10:54 AM			
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		Year to Date	
		12282018	12282019
		-----	-----
Total Charges		\$ 332768.27	\$ 324126.58
Total Payments		\$ 308423.08	\$ 299043.15
Total Adjustments		\$ 13866.09	\$ 29321.11
Total Ins Payments		\$ 133862.38	\$ 118236.04
Total Other Payments		\$ 174560.70	\$ 180807.11
Total New Patients		25	24
Total Adult Cleanings		378	361
Total Child Cleanings		27	24
ADA Category Summary			
-----			
Diagnostic	0000-9999	\$ 24485.34	\$ 29279.61
Preventive	1000-1999	\$ 41058.42	\$ 39072.40
Restorative	2000-2999	\$ 119620.30	\$ 127236.46
Endodontics	3000-3999	\$ 14757.64	\$ 12177.00
Periodontics	4000-4999	\$ 15168.93	\$ 15629.17
Prost.Removable	5000-5899	\$ 9933.00	\$ 4363.29
Maxillofacial	5900-5999	\$ 0.00	\$ 0.00
Prost.Fixed	6000-6999	\$ 76038.77	\$ 73627.50
Oral Surgery	7000-7999	\$ 21549.91	\$ 16895.80
Orthodontics	8000-8999	\$ 300.00	\$ 0.00
Adjunctive	9000-9999	\$ 9855.96	\$ 5845.35
End of Report			

**4. Evaluate how well are you doing with recall for patient cleanings?**

- From the Reports Menu select the "Management Reports"
- Select the "Recall 10 Year Analysis" button

**Recall 10 Year Analysis**

Most Recent Year to Consider:

**Recall 10 Year Analysis**  
**Family Dental Care**  
 Years: 2019<-->2010

12-30-2019 11:12AM

Year	Num Patients Charged	Num Patients Cleaned	Percent Patients Cleaned	Patients with Cleanings Avg Num Cleanings
2019	1666	1345	80.73%	1.44
2018	1721	1458	84.72%	1.48
2017	1760	1501	85.28%	1.45
2016	1820	1550	85.16%	1.46
2015	1828	1559	85.28%	1.45
2014	1864	1600	85.84%	1.41
2013	1855	1609	86.74%	1.39
2012	1918	1652	86.13%	1.40
2011	1847	1588	85.98%	1.37
2010	1852	1598	86.29%	1.42

Note: Patients Cleaned based on having at least one 1110 or 1120 Posted during the year

End of Report

Run
Print
Exit

**5. Patients overdue for recall for the most recent 24 month period**

- From the Reports Menu, select "Management Reports"
- Check "Over Due Recall Last 24 Months (Only considers Active Patients)"
- Click red "Run" button

**Note:** This reports generates an account number file that can be used to send Recall Cards, Letters, Emails, and/or Texts. Call Data Tec to find out how.

Family Dental Care Saturday, December 28, 2019		Recall Past Due During Last 24 Months					Page 1 10:44:27 AM		
Acct	Patient Name	Family Balance	Patient Balance	Last Office Visit	Age	Next Recall	Insurance		
1381	ABBY JOHNSON	\$ 5	\$ 5	06/22/2019	13	11/ /2019	DELTA DENTAL OF CA		
1218	MARY LEE FLORES	\$ 470	\$ 470	05/07/2019	46	11/ /2019	METLIFE DENTAL		
1181	HELEN BARKLEY	\$ 0	\$ 0	05/25/2019	56	11/ /2019	DELTA DENTAL OF ILLINOIS		
1027	SALLY CHAVEZ	\$ -42	\$ -42	11/02/2018	52	11/ /2019	DELTA DENTAL OF CA		
743	HARRY BELEFONTE	\$ 0	\$ 0	05/01/2019	68	11/ /2019			
298	MARY JACKSON	\$ 261	\$ 261	09/28/2019	74	11/ /2019	METLIFE DENTAL		
283	TIM OCONNOR	\$ -98	\$ -98	05/09/2019	81	11/ /2019			
202	SAMUEL OROZCO	\$ 578	\$ 578	05/22/2019	43	11/ /2019	METLIFE DENTAL		
115	BEV SMITH	\$ 148	\$ 148	09/18/2019	65	11/ /2019	METLIFE DENTAL		
44	EDDY PARKSON	\$ -10	\$ -10	09/07/2019	69	11/ /2019	UNITED CONCORDIA COMPANIES		
1407	THOMAS BURROUGHS	\$ -1	\$ -1	04/20/2019	5	10/ /2019	UNITED CONCORDIA COMPANIES		
1396	JULIE HASSAN	\$ -41	\$ -41	04/03/2019	61	10/ /2019	DELTA DENTAL OF CA		
1269	RALPH LOREN	\$ 0	\$ 0	04/20/2019	9	10/ /2019	UNITED CONCORDIA COMPANIES		
940	KAREN BLACK	\$ 0	\$ 0	05/15/2019	29	10/ /2019	METLIFE DENTAL		
928	PAUL FINK	\$ 0	\$ 0	10/23/2018	82	10/ /2019	DELTA DENTAL OF CA		
528	CHERYL KESSLER	\$ 0	\$ 0	08/28/2019	59	10/ /2019			
301	SUSAN JOHNSON	\$ -1491	\$ -1491	11/27/2018	54	10/ /2019	DELTA DENTAL OF CA		
159	MICHAEL GORDON	\$ 0	\$ 0	11/16/2018	58	10/ /2019	DELTA DENTAL OF CA		
83	ELSA SMITH	\$ -1522	\$ -1522	07/10/2019	70	10/ /2019	DENTAL HEALTH SERVICES		

## 6. Where are your patients coming from? How much are they worth?

- From the Reports Menu, select "Monthly Reports"
  - Try running all the Referral reports listed in the bottom right-hand corner
- Here are some examples:

### Referred by Doctors

Periodontal Care Plus		Referral Analysis Doctors			01/01/2022<-->12/31/2022		Page 1
Friday Feb 17, 2023							08:02 AM
Referring Doctor	Doc #	Num Referrals	Charges	Payments	% of Payments		
DR. MARK SMITH	902	75	\$102532.70	\$104778.70	6.25%		
DR. BARRY LUTHER	31	50	\$ 94952.64	\$ 95872.34	5.71%		
DR. MARY HEARTMAN	1437	31	\$ 79689.70	\$ 75441.45	4.50%		
DR. JESSIE VANERBILL	340	40	\$ 71342.62	\$ 72880.51	4.34%		
DR. GREG JACKSON	336	32	\$ 57873.70	\$ 57448.46	3.42%		
DR. SUSAN JONES	516	25	\$ 54186.01	\$ 52769.63	3.15%		
DR. JASON BLACK	407	31	\$ 52006.76	\$ 51206.21	3.05%		
DR. ROBERT FROST	361	17	\$ 55158.42	\$ 50253.72	3.00%		
DR. LARRY ZONKA	1224	20	\$ 47760.70	\$ 47530.83	2.83%		
DR. SUZANNE SOMMERS	715	8	\$ 48824.00	\$ 46312.00	2.76%		
DR. NICKI HEALY	1307	39	\$ 48697.89	\$ 44584.85	2.66%		
DR. BORIS JOHNSON	675	27	\$ 46281.80	\$ 42601.52	2.54%		
DR. JACKIE ROBINSON	522	20	\$ 41649.71	\$ 41673.95	2.48%		
DR. JOE JOHNSON	29	15	\$ 39792.76	\$ 41354.30	2.47%		
DR. GARY COOLEGE	889	24	\$ 41161.47	\$ 40018.97	2.39%		
DR. RODNEY JOHNSON	301	17	\$ 34113.64	\$ 33826.63	2.02%		
DR. WILLIAM HURT	1142	10	\$ 32565.01	\$ 32530.10	1.94%		
DR. BRUCE WILLIS	251	19	\$ 32721.40	\$ 31007.80	1.85%		
DR. JAMES DEAN	615	14	\$ 30683.00	\$ 30503.50	1.82%		
DR. CARRY GRANT	711	29	\$ 25911.71	\$ 28207.50	1.68%		
DR. ALBERT ENSTEIN	1291	11	\$ 27099.20	\$ 27200.80	1.62%		
DR. TOM NEWTON	357	25	\$ 24041.40	\$ 24456.16	1.46%		
DR. SALLY RIDE	245	18	\$ 21182.80	\$ 21220.60	1.26%		
DR. GLEN CAMPBELL	849	15	\$ 22284.44	\$ 21153.64	1.26%		
DR. TOD CARSON	292	8	\$ 14672.00	\$ 16152.40	.96%		
DR. JOHNNY CARSON	282	11	\$ 17294.31	\$ 15901.30	.95%		
DR. LOUIS GRANT	28	6	\$ 14143.00	\$ 15199.60	.91%		
DR. BRANDON LEE	1343	11	\$ 17651.69	\$ 15182.24	.91%		
DR. STANLEY HALL	764	7	\$ 14617.44	\$ 14445.00	.86%		
DR. ROBERT WEAVER	877	5	\$ 12597.33	\$ 12538.00	.75%		
DR. SUSAN ENGLAND	1430	7	\$ 11336.00	\$ 10907.70	.65%		
DR. KIRK DOUGLAS	1183	4	\$ 9579.00	\$ 10654.00	.64%		
DR. MICHAEL DOUGLAS	1040	3	\$ 10378.64	\$ 9954.34	.59%		
DR. JIMMY STEWART	1453	4	\$ 10072.00	\$ 9883.30	.59%		
DR. JOHN WAYNE	938	16	\$ 9405.80	\$ 9854.05	.59%		

### Referred by Patients

Periodontal Care Plus		Referral Analysis Patients			01/01/2022<-->12/31/2022		Page 1
Friday Feb 17, 2023							08:20 AM
Referring Patient	New Patient	First Visit	Production				
720 MARY JONES	17075 JEFF KENDALL	01062022	\$ 139.00				
5418 SALLY SMITH	17420 THOMAS SIDNEY	08292022	\$ 1930.00				
16868 CAROL CROW	17370 GEORGE GOBAL	10112022	\$ 544.33				
8541 LEFTY JOHNSON	17450 NASH HIGGINS	09272022	\$ 725.00				
13426 STEWARD JONES	15881 LARRY FLIN	12272022	\$ 795.00				
17047 SAMMY DAVIS	17192 HUGE GRANT	03282022	\$ 139.00				
8111 CHARLES BARKLEY	14132 SALLY WILLIS	02222022	\$ 194.00				
577 SONYA JENKINS	17101 KAREN RABORN	02162022	\$ 222.00				



## Referring Doctors Monthly Activity Pattern

Periodontal Care Plus Friday Feb 17, 2023 Referring Doctor		Referral Analysis Doctors Year=2022 08:31 AM												Page 1	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total #	Total \$
DR. ANDY COUGHMAN		1	1											2	1485.00
DR. ANNE JOHNSON			1	2	1		1	1	1	2			1	10	25503.00
DR. ARRON ELLIS									2	1			1	4	3150.00
DR. BENNY SMITH			1	3		2	3	1	4	1		1		16	23275.20
DR. CYNDI JOHNSON						1						1		2	1289.00
DR. DAVID COPERFIELD				1							1			2	2150.00
DR. JANE GOODALL			1	1		1		2		1	1			7	11524.92
DR. JOHN GLENN								1						1	3696.60
DR. LARRY BYRD				1										1	2255.00
DR. LARRY THOMAS							1							1	3399.00
DR. MAGIC JOHNSON			1											1	2981.00
DR. STEVE KASTANSA				1										1	2615.02
DR. THOMAS JONES												1		1	580.00

## Patients by Doctor

Periodontal Care Plus Friday Feb 17, 2023 Referring Doctor		Referral Analysis Patients by Doctor 01/01/2022<-->12/31/2022				Page 1 08:45 AM	
		New Patient		First Visit	Charges	Payments	
1428	ALLIED DENTISTRY	17337	STANLEY HALSTON	08292022	\$ 312.00	\$	312.00
Num Seen = 1		Num Charged = 1			\$ 312.00	\$	312.00
976	DR. MARIO JOHNSON	17165	JACKIE JORDON	03092022	\$ 530.00	\$	530.00
976	DR. MARIO JOHNSON	17410	MARY SUE JONES	10102022	\$ 1620.00	\$	1620.00
Num Seen = 2		Num Charged = 2			\$ 2150.00	\$	2150.00
1437	DR. ANN JOHNSON	17071	MIKE HAMMER	02112022	\$ 5240.00	\$	5240.00
1437	DR. ANN JOHNSON	17120	SUE J JENKINS	04112022	\$ 130.00	\$	130.00
1437	DR. ANN JOHNSON	17128	CYNDI HOPPER	03092022	\$ 400.00	\$	400.00
1437	DR. ANN JOHNSON	17191	CARRY ANDERSON	03222022	\$ 3150.00	\$	3150.00
1437	DR. ANN JOHNSON	17325	RALPH BAKER	06222022	\$ 1285.00	\$	1285.00
1437	DR. ANN JOHNSON	17349	TINA TURNER	07062022	\$ 5508.00	\$	5508.00
1437	DR. ANN JOHNSON	17377	DENISE SMITH	08152022	\$ 4730.00	\$	4730.00
1437	DR. ANN JOHNSON	17419	SHERWIN WILLIAMS	09142022	\$ 3355.00	\$	3355.00
1437	DR. ANN JOHNSON	17435	AUTHUR CRANSON	12152022	\$ 530.00	\$	530.00
1437	DR. ANN JOHNSON	17446	MICHEL BEAL	09232022	\$ 1175.00	\$	1175.00
Num Seen = 10		Num Charged = 10			\$ 25503.00	\$	25503.00
1231	DR. ADAM NORTH	17068	STEPHEN JACKSON	01262022	\$ 955.00	\$	902.00
1231	DR. ADAM NORTH	17105	LYLE ANDERSON	02152022	\$ 530.00	\$	530.00
Num Seen = 2		Num Charged = 2			\$ 1485.00	\$	1432.00
1430	DR. HUGE GRANT	17138	BESS PARKER	02222022	\$ 125.00	\$	125.00
1430	DR. HUGE GRANT	17174	TONY GONZELLES	03142022	\$ 6096.00	\$	6096.00
1430	DR. HUGE GRANT	17234	KURT WARNER	05092022	\$ 400.00	\$	400.00
1430	DR. HUGE GRANT	17323	NANCY PETERSON	07112022	\$ 355.00	\$	355.00
1430	DR. HUGE GRANT	17379	ROBERT DOUGLAS	07292022	\$ 1775.00	\$	1775.00
1430	DR. HUGE GRANT	17411	KATHY NEVERLAND	09022022	\$ 2415.95	\$	2079.70
1430	DR. HUGE GRANT	17472	MICHELLE GROSSMAN	10182022	\$ 357.97	\$	157.00
Num Seen = 7		Num Charged = 7			\$ 11524.92	\$	10987.70



**7. How much are new patients worth their first year with the practice?**

- From the Reports Menu, select "Management Reports"
- On the Management Reports Menu, select "Patient First Year Value Statistics"

**New Patient First Year Statistics**

12282017 12282018 00  
New Patient Date Range Dentist Num

**New Patient First Year Statistics**  
Dates:12282017<-->12282018  
Family Dental Care

12-28-2019 10:34 AM

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Number New Patients =	23	(With Charges)
Average New Pats/Month =	1.92	
Total Charges = \$	28088.38	
Total Payments = \$	28018.99	
Average First Year Charges/Pat = \$	1221.23	
Average First Year Payments/Pat = \$	1218.22	99.75% Recovery
Insurance Payments = \$	8709.16	31.08%
Non Insurance Payments = \$	19309.83	68.92%

**Run** **Print** **Exit**

### 8. Graphical Overview of several practice statistics

- From the Reports Menu, select "Management Graphs"
- Select the "10 Year Graphs" button
- Select the "Extract Data 10 Years" button. (This can take a few minutes)
- Select the type of graphical data you wish to view: charges, payments, new patients, visits, cleanings, etc.

Here is an example of a Charges/Production graph:  
(Note the detailed amounts are listed on the bottom of the report)

