



Please print the following and fax or scan/e-mail to:

Attention: Angie Skinner
Fax: 662-796-3080
angie@performancedentalcoaching.com

I will also set up a DropBox folder, and invite you, if that will be easier.

If you're faxing, please include a cover letter so all forms can be attributed to the correct practice.

2018 and YTD 2019:

- Total Production
- Total Collection
- Average Monthly Hygiene Production
- Average Number of New Patients Monthly
- Year-to-Date Profit and Loss Statement (from QuickBooks or Quicken or from your accountant's statement); I want to review your expenses. If there's no P+L, I will need:
 - Average Monthly Overhead (excluding doctor's salary)
- Staff Salaries (either hourly or daily wage, for every employee. If commission, please attach a payroll statement from Paychex, etc)
- Production Report by Procedure – report detailing exact number of times each procedure code has been performed during the year
- Summary page, Unscheduled Treatment Plan report
- Payment breakdown, traditional payment methods versus insurance payouts
- Current UCR fee schedule
- Insurance write-off amounts
- Details of any/all plans you participate in

While I'm at your office, I want to review your new patient induction forms, stationery, financial arrangement forms, and any marketing pieces.

Please let me know if you have any questions; feel free to call or text me on my cell: 828-301-3885.

Take care,

Angie