



Practice Optimization Analysis

Data Request and Questionnaire

Overview

Our practice optimization analysis is a comprehensive evaluation of the current state of your practice to identify opportunities to increase profitability and lower your expenses through benchmarking and implementing industry best practices.

INSTRUCTIONS

To complete this analysis, we need financial, practice management, and overhead expense information. **Once all of your data is collected, please email to Jordan Herbert, jherbert@dynamic-da.com**

Financial Reports

Please reach out to your CPA for the following information:

Financial Report	Date Range(s)
Profit & Loss Statement	<ul style="list-style-type: none">• Previous Calendar Year• (Year-to-Year Comparison When Possible)• Current YTD

Practice Management Reports

To complete the analysis, we need the following reports from your practice management system:

- Current Fee Schedule
- Production Quantity Report (by code)
- Production Detail Report
- Adjustments Report
- Collections Report

To simplify the process we developed a document for each practice management system. Therefore, [please click on the links below for step-by-step instructions on how to pull the data from your specific practice management system.](#)

- [Dentrix](#)
- [Dentrix Ascend](#)
- [EagleSoft](#)
- [EndoVision](#)
- [OpenDental](#)
- [Practice Works](#)

If your practice management system is not listed above and/or you are struggling to pull the data, please send Jordan Herbert an email at: Jherbert@dynamic-da.com and we will walk you through pulling the data.