



# 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 Maggie Garrigan, [mgarrigan@dynamic-da.com](mailto:mgarrigan@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"> <li>• Previous Calendar Year</li> <li>• (Year-to-Year Comparison When Possible)</li> <li>• Current YTD</li> </ul>
Balance Sheet	<ul style="list-style-type: none"> <li>• Current YTD</li> </ul>

### Practice Management Reports

To complete the analysis, we need the following reports from your practice management system for Year-To-Date current year and full year for the previous year.:

- 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](#)
- [Mogo](#)
- [SoftDent](#)
- [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](mailto:Jherbert@dynamic-da.com) and we will walk you through pulling the data.