

# Case Acceptance Scorecard

Measure the effectiveness of the dental team in converting diagnosed treatment into accepted care.

PRACTICE NAME: \_\_\_\_\_ MONTH: \_\_\_\_\_ YEAR: \_\_\_\_\_



## MEASURES

Track the four key numbers that drive case acceptance.

|   |                                                                                                                                                | THIS PERIOD          |
|---|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 1 | <b>Patient Visits</b><br>The total number of patient visits.                                                                                   | <input type="text"/> |
| 2 | <b>Patients with Treatment Added</b><br>The number of patients that treatment was added to their treatment plan or unscheduled treatment done. | <input type="text"/> |
| 3 | <b>Amount of Treatment Presented (\$)</b><br>The total dollar amount of treatment presented.                                                   | <input type="text"/> |
| 4 | <b>Patients with Treatment Accepted</b><br>The number of patients that scheduled treatment or completed same-day treatment.                    | <input type="text"/> |



## RATIOS

Calculate your performance using the formulas below.

|   |                                                                                                                      |                                | THIS PERIOD          | GOAL                 |
|---|----------------------------------------------------------------------------------------------------------------------|--------------------------------|----------------------|----------------------|
| 1 | <b>Diagnosis Percentage</b><br>Measures how effectively we diagnose treatment needs.                                 | $\frac{\#2}{\#1} \times 100 =$ | <input type="text"/> | <input type="text"/> |
| 2 | <b>Average Presented Dollars</b><br>Measures the average dollar amount of treatment presented per patient diagnosed. | $\frac{\#3}{\#2} = \$$         | <input type="text"/> | <input type="text"/> |
| 3 | <b>Acceptance Percentage</b><br>Measures how effectively we convert diagnosed treatment into accepted care.          | $\frac{\#4}{\#2} \times 100 =$ | <input type="text"/> | <input type="text"/> |



## TEAM NOTES & ACTION PLAN