

### STEP 1 - PRINT

We suggest you PRINT this Self-Assessment. Use it as a checklist for how you and your team could be more efficient, more effective, and achieve better results in collecting money from insurance.

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### STEP 2 - GRAB A PENCIL

In the leftmost column, rate yourself as follows:

	<b>Always</b>	This means you do this every time, for all patients, consistently and without fail. If you check this you can say your office is truly executing the Best Practice.
	<b>Sometimes/ Not Sure</b>	This ranges from "almost always" to "practically never." It's an extremely broad range.
	<b>Never</b>	Be honest about it! Identify the holes you most need to plug in your operations.

Don't be discouraged by the "Sometimes" and "Nevers." Before you can improve your situation, you need a clear picture of where you are, where you need to be, and how to get there! While the "Always" helps you see how far you've come, the "Sometimes" and "Nevers" help you pinpoint the changes you can make in the future!

CURRENT EFFORTS	INSURANCE COLLECTIONS BEST PRACTICES
	I attach accurate coverage information for insurance plans, to ensure accurate estimates to patients
	I submit claims with proper documentation
	I use the Dentrrix Ascend Home screen to monitor Unattached Procedures and Unsent Claims throughout the day
	I zero out Unattached Procedures daily
	I zero out Unsent Claims daily
	I take time to work on all rejected and overdue claims daily
	Our team reviews outstanding claims weekly
	I review the Insurance A/R Overview and the Insurance A/R Problematic Payers charts weekly to measure our financial situation
	Less than 25% of my claims are overdue (30 days)

### **STEP 3 - FOCUS ON YOUR WINS**

Did you just find out you have more BEST practices in place than you thought you did? Congratulations! Don't forget to applaud your team for consistently doing such a great job.

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### **STEP 4 - MAKE GOALS TO IMPROVE**

Let the list of "Sometimes" and "Nevers" become a CONTINUOUS IMPROVEMENT LIST. Pick 2-3 things and commit to do them 100%. As you re-take this assessment down the road, compare your results and see where you've improved.