



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

Attention: Angie Skinner
Fax: 888-518-7810
angie@coachdentists.com

For larger files, we can 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.

2024 and YTD 2025:

- 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 at your office, we will review your new patient induction forms, stationery, financial arrangement forms, and any marketing pieces.

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

Take care,

Angie