



# ASSOCIATE ASSESSMENT

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Our analysis identifies nine *essential* benchmarks to consider to successfully add an associate to your practice. This report examines those areas, summarizing considerations for each, while highlighting strengths and areas that may need additional support to ensure both your practice's success and the *success* of your potential associate.



Did we mention this is a complimentary service for our partners?



# Thank You

for providing the Practice Support Team with the reports needed to complete your personalized Practice Analysis reports. This assessment gives us the first glimpse into the story of your dental practice.

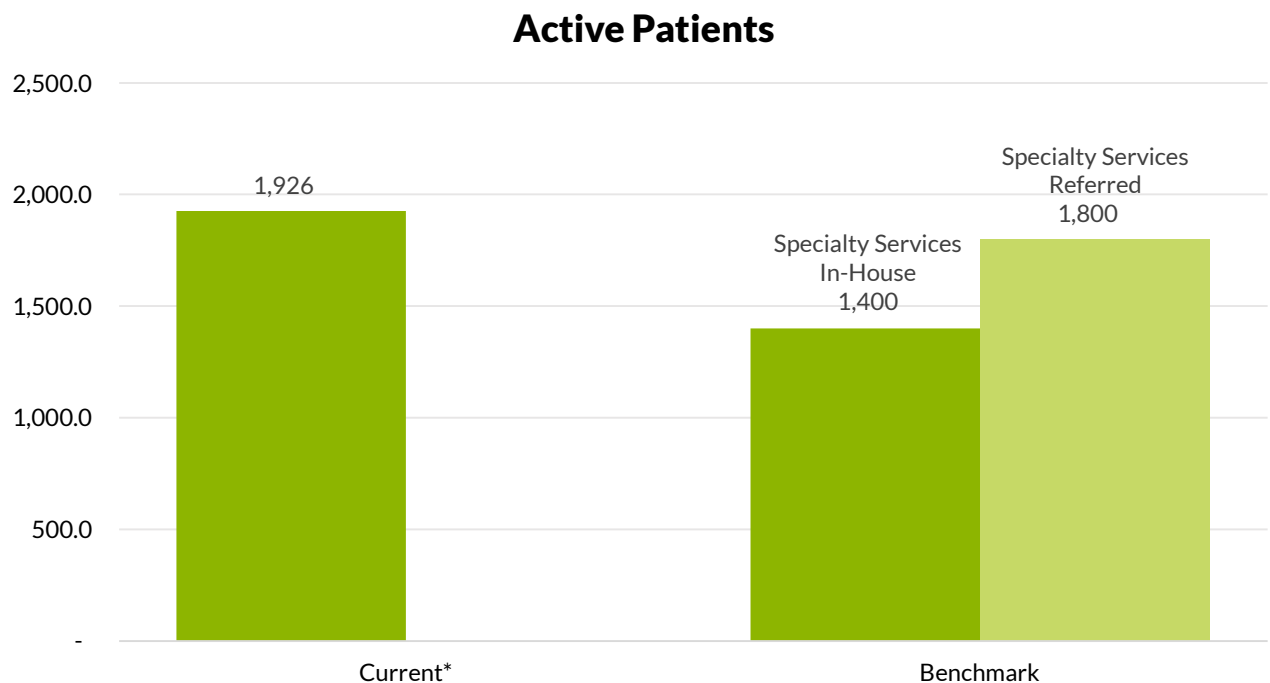
After reviewing this analysis, let's discuss the story behind the numbers. We invite you to set up a free call to review the findings. We want to celebrate your team's strengths and discuss potential growth opportunities. Our goal is to build an action plan with you!

Burkhart's Practice Support Team is a value-added, complimentary consulting service available to Burkhart's Supply Savings Guarantee clients and those spending an average of 40K annually on merchandise with Burkhart. It represents a commitment we have to contribute to the success of your practice.

# Active Patients

## Summary

- Approximately 350 - 450 patients = 1 day/week of Doctor time when booked out 3-4 weeks.
- A more conservative diagnostic style requires additional patients, while a more comprehensive treatment planning approach requires fewer patients.
- Fewer patients are needed if traditionally referred treatment can be completed in-house.
- Your clinical philosophy of care, in-house treatment vs. referrals and patient demographics can impact this number.



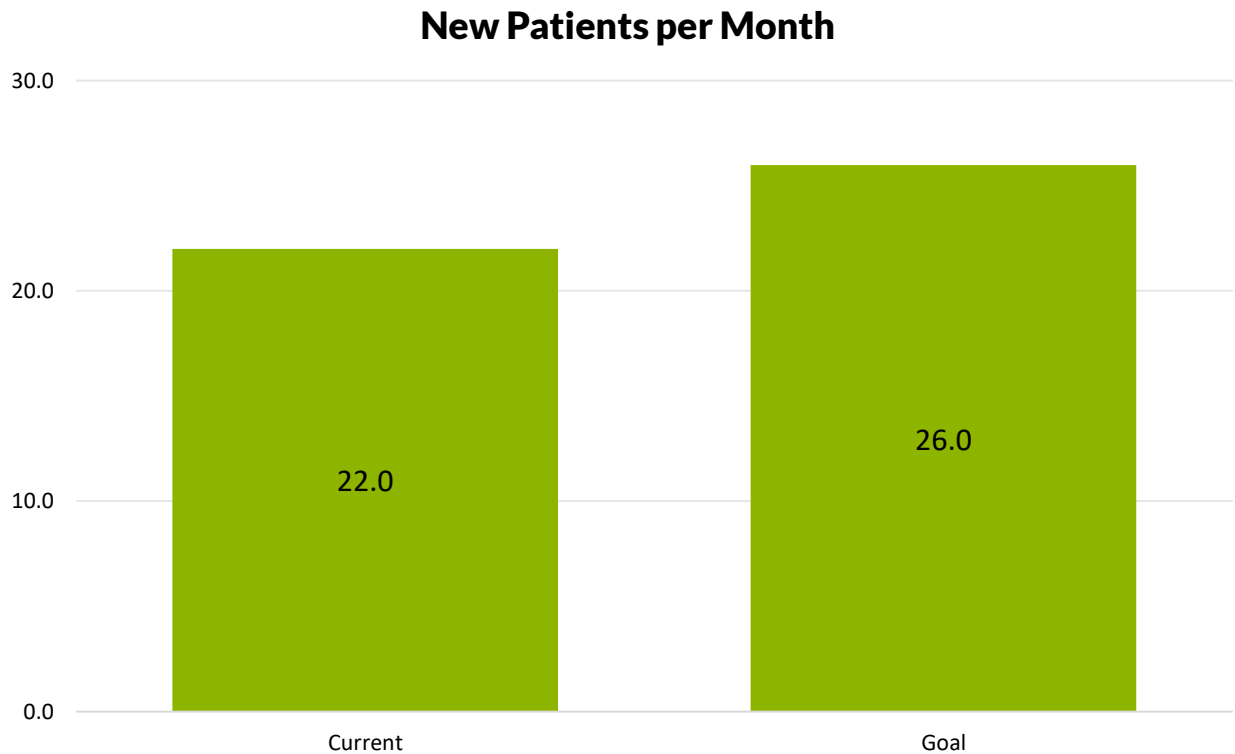
\*Active patients based on a total calculation of the number of patients receiving hygiene services in addition to the number of comprehensive new patient exams provided and a 10% inflation to cover emergencies and non-hygiene patients such as denture cases, all on 4 treatment, etc.



# New Patients

## Summary

- D0150 and D0180 coding determine new patient volume – this does not include new patients brought in under limited exam (D0140) coding.
- It is possible to reduce your current wait time for a new patient with the addition of an Associate. The added availability can result in more new patients per month. Ideally, a new patient opportunity is available within two weeks of inquiry.
- Healthy benchmarks indicate 2 new patients per working day for each Doctor are necessary for growth in patient volume and production.



**Dr. days/wk reported: 4**

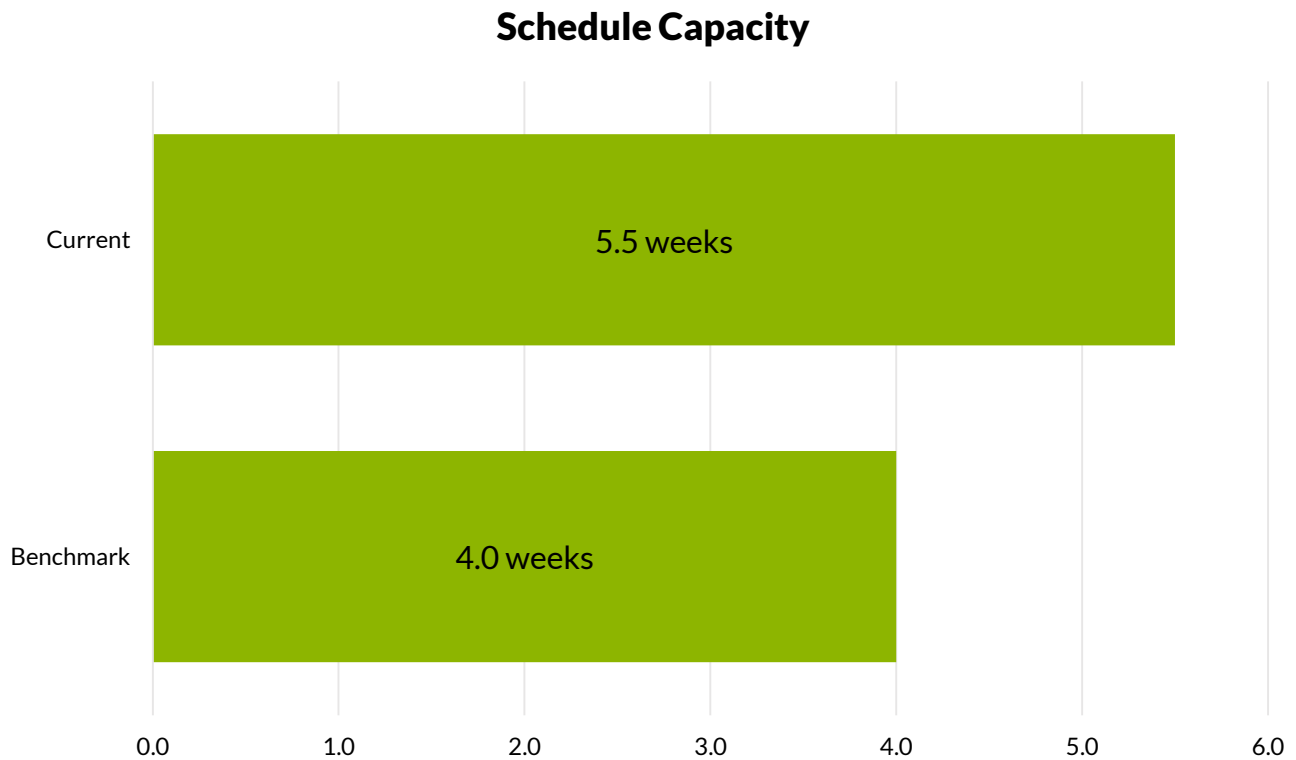


# Scheduling Capacity

## Summary

- In a healthy practice, the restorative schedule should be booked out approximately 5.5 weeks, allowing for reserved emergency time.
- Scheduling capacity is impacted by op availability. Fewer operatories may require creative scheduling, or additional patient care hours, to maximize your facility.
- Scheduling protocols will also impact your capacity. Call Burkhart's Practice Support Team if current operatory capacity is a challenge, or scheduling templates are needed.

Current Number of Ops: 5



# Operatory Capacity

## Why Operatory Capacity Matters When Adding an Associate

Operatory capacity is a critical factor in determining whether your practice can support an additional Associate. Without enough operatories, scheduling becomes inefficient and can lead to overlapping appointments, reduced productivity, and patient dissatisfaction. If current capacity is limited, consider these options:

**Build-Out When Feasible:** Expanding the physical space to add operatories can provide long-term flexibility and growth.

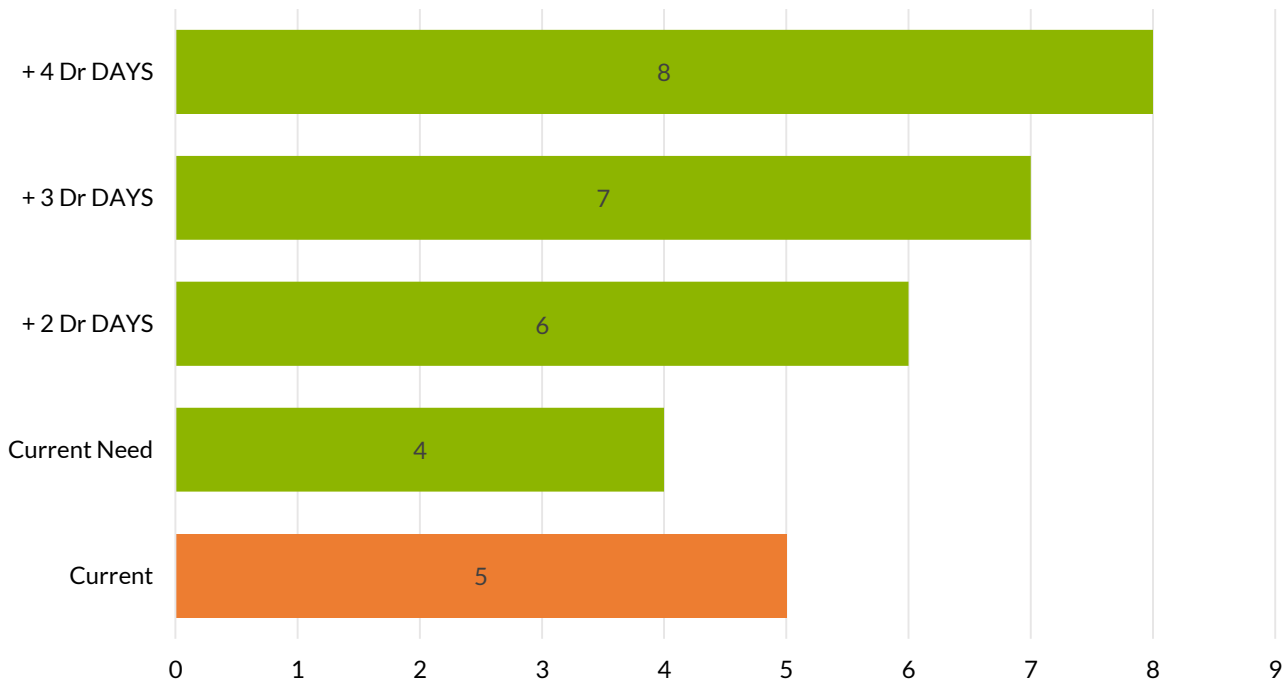
**Optimize Existing Space:** Utilize current operatories more effectively by adjusting scheduling strategies.

**Extended Hours:** Offer evening appointments, a full five-day schedule, and Saturday availability to maximize access without significant overlap.

Adequate operatory capacity ensures smooth workflows, better patient experiences, and sustainable growth for your practice. Reach out to your Burkhart Account Manager to discuss ways

Current Number of Ops: 5

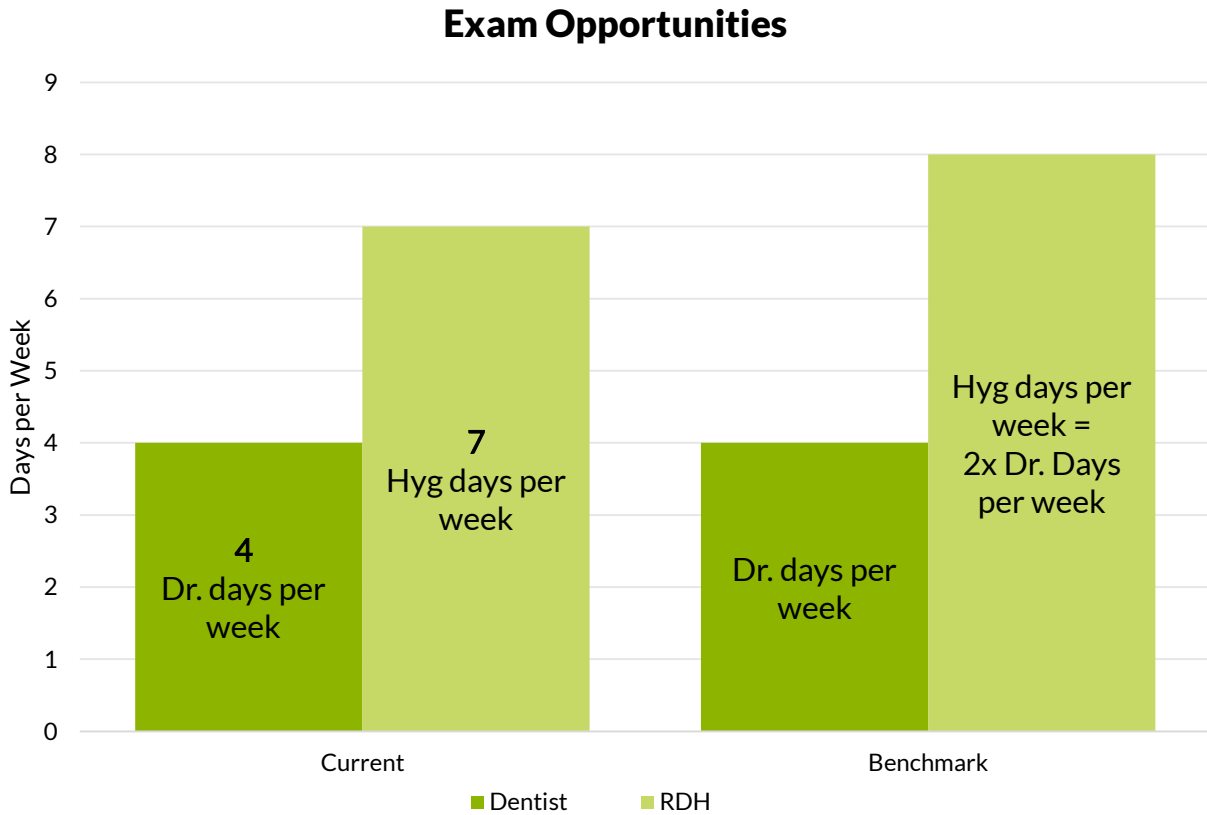
### Operatory Capacity Need



# Exam Opportunities

## Summary

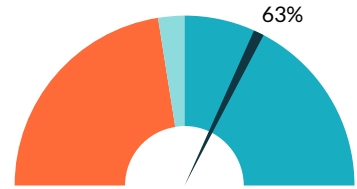
- Ideally, each Doctor has access to 1.5 - 2 exams per hour. This requires two hygiene days per week for every one Doctor day per week.
- A comprehensive approach to treatment planning, additional new patient growth, and added services will be instrumental in successfully integrating an Associate.



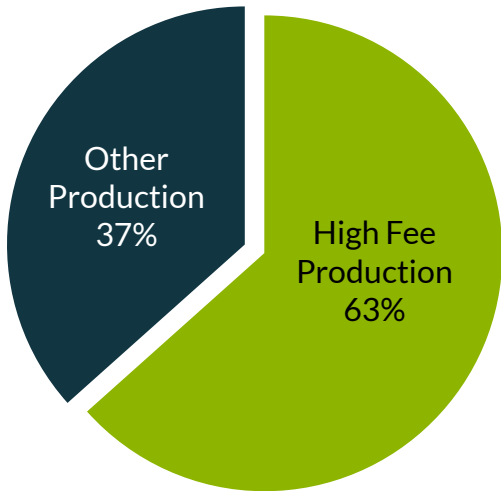
# Restorative Mixture of Services Annual Patient Value (APV)

The case completion rate for higher fee services (such as crown, bridge, veneer, implants, orthodontic treatment) gauges the ability of the practice to promote treatment generally requiring a higher out-of-pocket expense for the patient. The healthy benchmark of 50% is met when sound patient communication systems are followed. The use of intraoral images, before and after photos, and a comprehensive patient interview model contributes to case acceptance. Financial systems must also be in place to ensure affordability for the patient.

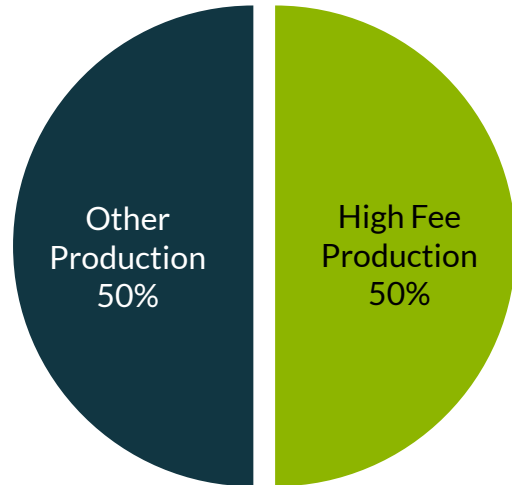
Dr. Kerry Sample  
Higher Fee Health



**Dr. Kerry Sample  
Production % for Higher Fees**



**Healthy DDS Production %  
for Higher Fee Services**



**vs.**

*Estimated active patients:	1,926
Annual Patient Value (Production/Collections): \$	1,260 / \$ 886
Filling to Crown Ratio:	2.5 : 1

## Is your restorative mixture of services or APV less than desired?

Coaching to increase case acceptance is available to qualified Burkhart clients through email, phone appointments, additional practice resources, and articles. Practice Support Team has found an average APV by production is \$1,173 and APV by collections of \$991 through our independent client analysis. Your APV should increase annually to match the national annual inflation rate, at minimum.

\*Active patients based on the number of patients receiving hygiene services in addition to the annual comprehensive new patient exams with a 10% inflation to cover emergencies and non-hygiene patients such as denture cases, all on 4 treatment, etc.

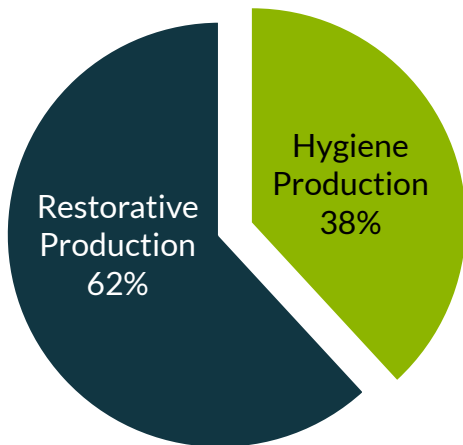


# Hygiene Contribution

## Summary

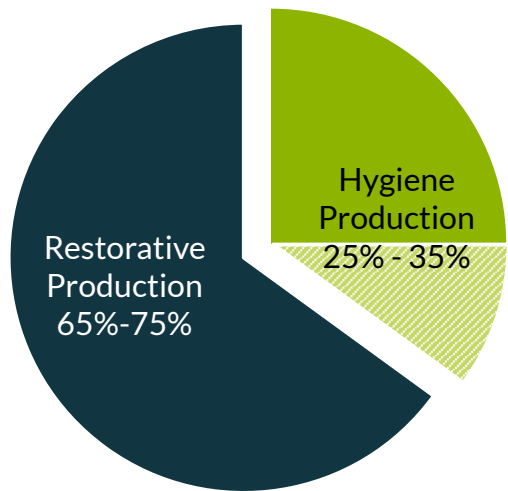
- A healthy contribution from hygiene services is 25-35% of the total production for a practice.
- Building the hygiene department creates passive income for the dentist and builds long-term loyalty for patients.
- The patient demand must be in alignment with hygiene opportunities offered.
- A healthy hygiene recare system must also be in place and actively managed.

**Dr. Kerry Sample  
Hygiene Production % of Gross**



**VS.**

**Healthy Hygiene Production %  
of Total Production**



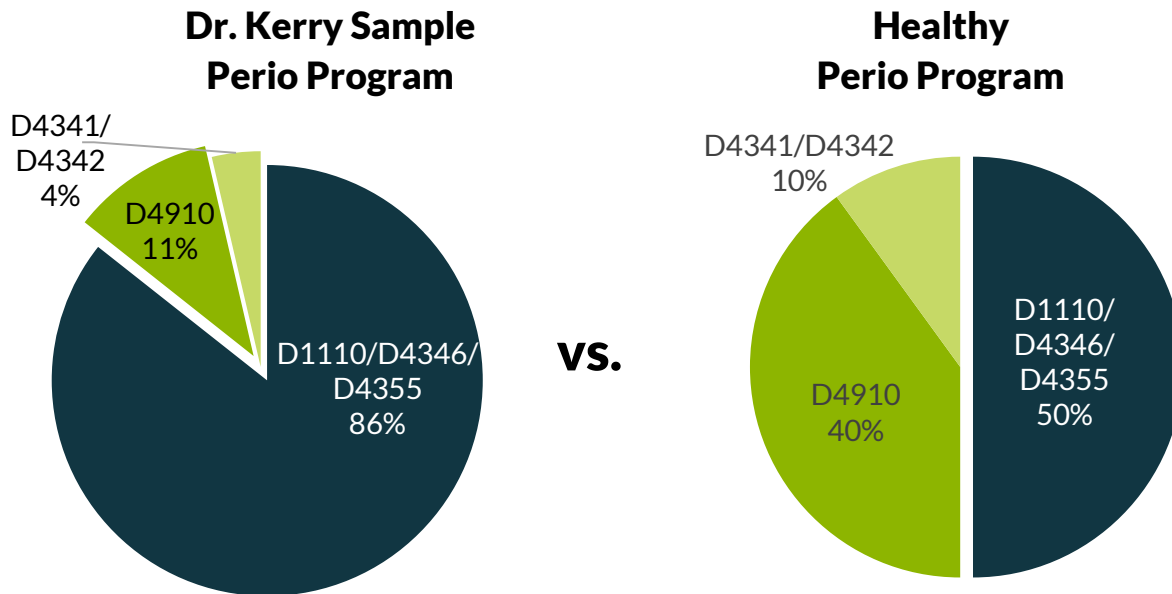
# Perio Program

## Current vs. Healthy

### Summary

- According to the Center for Disease Control (CDC), 47.2% of Americans have periodontal disease.
- The American Dental Association (ADA) considers periodontal disease prevalent, yet under-diagnosed.
- The codes selected for hygiene treatment reflect your diagnosis.
- We have found many practices code a prophylaxis (D1110) when in fact they are providing a periodontal maintenance procedure (D4910)
- Inaccurate coding creates unnecessary liability for the dental practice, sends the wrong message to the patient, negatively impacts case acceptance and hampers job satisfaction.
- Call Practice Support Team for further support if needed.

**Potential Growth Opportunity: \$42,371.20**



### Wins from a Healthy Perio Program:

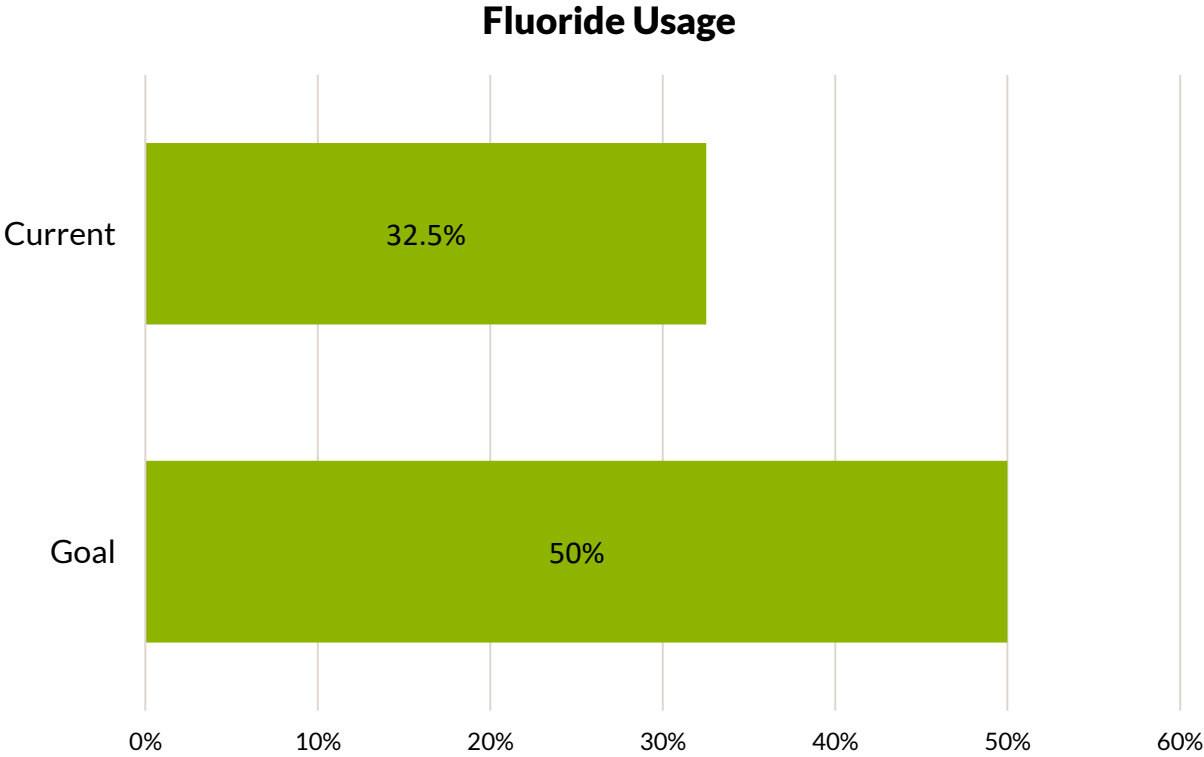
- Higher oral health awareness for patient
- Increased patient loyalty, fewer no-show
- Higher job satisfaction for RDH
- Increased restorative case acceptance
- Improved scheduling
- Improved profitability



# Fluoride Usage

**Potential Growth Opportunity:  
\$11,523**

Preventive care programs help create a loyal patient base that trusts the practice to provide services that are in their best interest. It leads to a "we are in this together" philosophy between the patient and their provider. Many dental benefit plans provide coverage for adult fluoride treatments on a regular basis.



**Is your fluoride usage less than desired?**

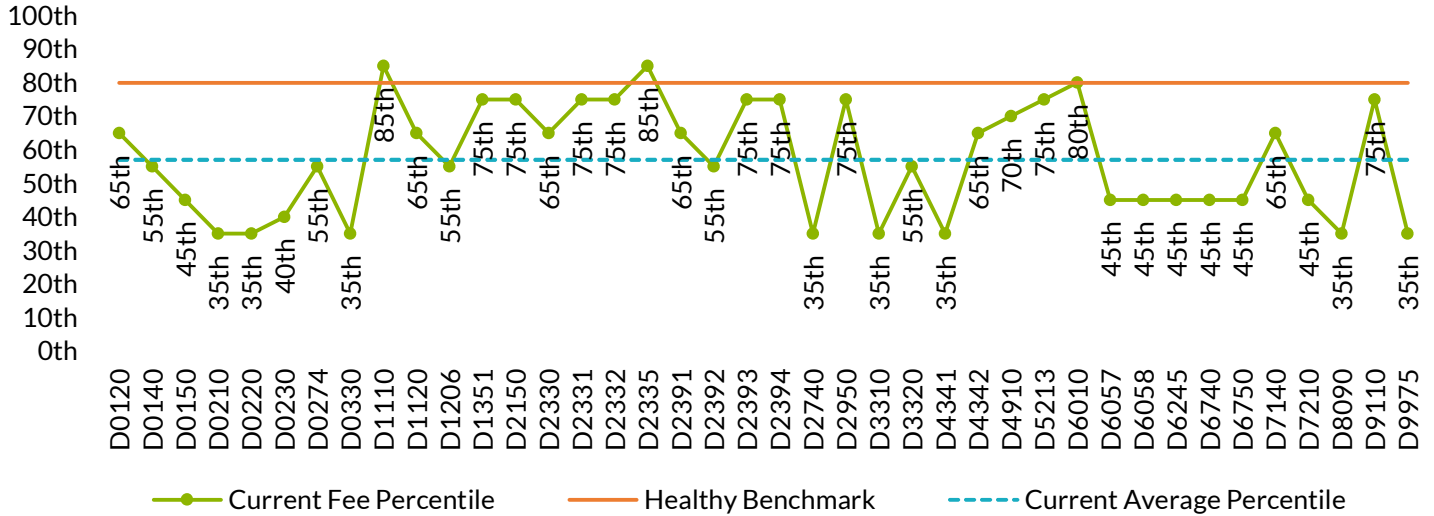
We can strategize with you to increase your fluoride usage by incorporating systems and scripting to increase your case acceptance. Some of the same principles can be used to increase your case acceptance rates for additional treatment you would like to do more frequently.





# Dr. Kerry Sample

## Current Fee Percentile Range



**Overall fee percentile = 57th**

Code	Practice Fee	Fee Percentile	Zip code 98226
			80th
D0120	\$78	65th	\$84
D0140	\$110	55th	\$122
D0150	\$125	45th	\$144
D0210	\$109	<40th	\$202
D0220	\$40	<40th	\$47
D0230	\$35	40th	\$41
D0274	\$89	55th	\$98
D0330	\$110	<40th	\$176
D1110	\$151	85th	\$145
D1120	\$98	65th	\$107
D1206	\$55	55th	\$63
D1351	\$84	75th	\$85
D2150	\$290	75th	\$303
D2330	\$248	65th	\$265
D2331	\$317	75th	\$318
D2332	\$380	75th	\$386
D2335	\$489	85th	\$482
D2391	\$270	65th	\$284
D2392	\$330	55th	\$361
D2393	\$435	75th	\$439

Code	Practice Fee	Fee Percentile	Zip code 98226
			80th
D2394	\$510	75th	\$516
D2740	\$1,425	<40th	\$1,700
D2950	\$402	75th	\$412
D3310	\$890	<40th	\$1,150
D3320	\$1,200	55th	\$1,309
D4341	\$325	<40th	\$387
D4342	\$275	65th	\$294
D4910	\$198	70th	\$209
D5213	\$2,800	75th	\$2,843
D6010	\$2,750	80th	\$2,750
D6057	\$1,115	45th	\$1,295
D6058	\$1,710	45th	\$1,980
D6245	\$1,486	45th	\$1,668
D6740	\$1,486	45th	\$1,688
D6750	\$1,500	45th	\$1,713
D7140	\$290	65th	\$305
D7210	\$380	45th	\$440
D8090	\$4,500	<40th	\$6,689
D9110	\$198	75th	\$208
D9944	\$410	<40th	\$863



# Fee Increase Recommendations

Dr. Kerry Sample

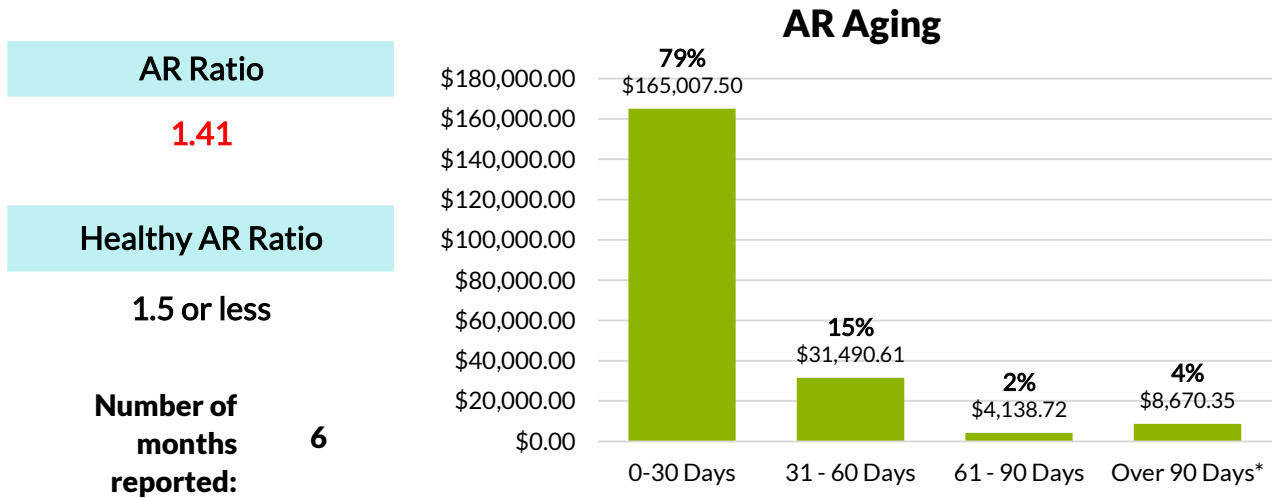
Zip Code: 98226

CODE	Office Fee	80th PERCENTILE	Recommendation	Recommended Fee	Fee Change
D0120	\$78	\$84	Increase to 80th	\$84	\$6
D0140	\$110	\$122	Increase to 60th	\$112	\$2
D0150	\$125	\$144	Increase to 60th	\$132	\$7
D0210	\$109	\$202	Increase to 60th	\$188	\$79
D0220	\$40	\$47	Increase to 80th	\$47	\$7
D0230	\$35	\$41	Increase to 80th	\$41	\$6
D0274	\$89	\$98	Increase to 80th	\$98	\$9
D0330	\$110	\$176	Increase to 60th	\$162	\$52
D1110	\$151	\$145	No Change	\$151	\$0
D1120	\$98	\$107	Increase to 80th	\$107	\$9
D1206	\$55	\$63	Increase to 80th	\$63	\$8
D1351	\$84	\$85	Increase to 80th	\$85	\$1
D2150	\$290	\$303	Increase to 80th	\$303	\$13
D2330	\$248	\$265	Increase to 80th	\$265	\$17
D2331	\$317	\$318	Increase to 80th	\$318	\$1
D2332	\$380	\$386	Increase to 80th	\$386	\$6
D2335	\$489	\$482	No Change	\$489	\$0
D2391	\$270	\$284	Increase to 80th	\$284	\$14
D2392	\$330	\$361	Increase to 80th	\$361	\$31
D2393	\$435	\$439	Increase to 80th	\$439	\$4
D2394	\$510	\$516	Increase to 80th	\$516	\$6
D2740	\$1,425	\$1,700	Increase to 80th	\$1,700	\$275
D2950	\$402	\$412	Increase to 80th	\$412	\$10
D3310	\$890	\$1,150	Increase to 80th	\$1,150	\$260
D3320	\$1,200	\$1,309	Increase to 80th	\$1,309	\$109
D4341	\$325	\$387	Increase to 60th	\$361	\$36
D4342	\$275	\$294	Increase to 80th	\$294	\$19
D4910	\$198	\$209	Increase to 80th	\$209	\$11
D5213	\$2,800	\$2,843	Increase to 80th	\$2,843	\$43
D6010	\$2,750	\$2,750	No Change	\$2,750	\$0
D6057	\$1,115	\$1,295	Increase to 80th	\$1,295	\$180
D6058	\$1,710	\$1,980	Increase to 80th	\$1,980	\$270
D6245	\$1,486	\$1,668	Increase to 80th	\$1,668	\$182
D6740	\$1,486	\$1,688	Increase to 80th	\$1,688	\$202
D6750	\$1,500	\$1,713	Increase to 80th	\$1,713	\$213
D7140	\$290	\$305	Increase to 80th	\$305	\$15
D7210	\$380	\$440	Increase to 80th	\$440	\$60
D8090	\$4,500	\$6,689	Increase to 80th	\$6,689	\$2,189
D9110	\$198	\$208	Increase to 80th	\$208	\$10
D9944	\$410	\$863	Increase to 80th	\$426	\$16



# Collections

Accounts Receivable Aging is a key performance indicator that allows you to monitor the health of the systems that support collections. These systems require diligence from your administrative team as well as your clinical team.



Accounts Receivable: \$209,307.18

Past Due (over 90 days\*): \$8,670.35

\*Orthodontic treatment may reflect a higher than average over 90 day balance

Healthy benchmarks indicate your aging AR over 90 days should be 10% or less of the total AR. Note that this does not include orthodontic balances as they are often paid over the term of the treatment. The AR Ratio measures how effectively the practice manages credit and is calculated by dividing the total AR by the average monthly net production.

### 12-Month Collection %

<b>Gross %</b>	<b>Net %</b>
70%	96%

Gross Production as indicated on Procedure Code Report	Net Production	Collections
\$1,213,715.21	\$890,773.25	\$852,917.23

**Are your collections lower than desired? Adjustments higher than desired?**

Reach out to the Practice Support Team for additional strategies to maximize your reimbursements.





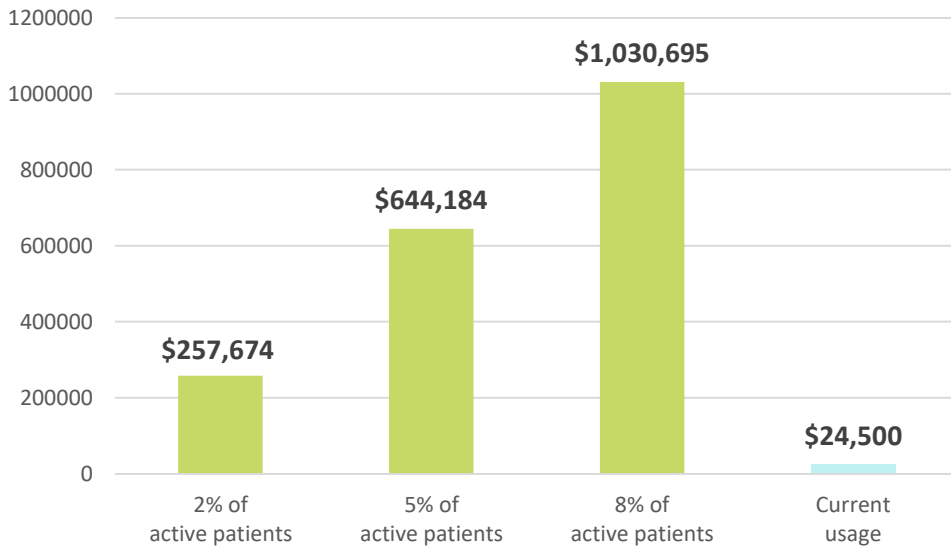
# Dr. Kerry Sample

## Clear Aligner Potential

**Potential Growth Opportunity:  
\$233,174**

Integrating clear aligner therapy into your dental practice is not only a wise business decision—it also enhances patient care. Advances in technology have significantly improved outcomes, boosting the confidence of general practitioners to provide these services directly. You eliminate the need for referrals, allowing patients to receive trusted care in a familiar environment. The projections below illustrate the potential increase in production based on 2%, 5%, and 8% acceptance rates relative to your active patient base.

### Clear Aligner Potential



*Based on a 12-month clear aligner treatment case compared to 80th percentile fee for your zip code.*

#### Are you considering Clear Aligner Treatment in your practice?

We can point you in the right direction for resources and expertise from your Burkhart Account Manager and select pricing with FirstClass Aligners. If you are currently offering clear aligner treatment, but have a lower than ideal case acceptance rate, we offer verbal scripting and strategies to help improve case acceptance rates.



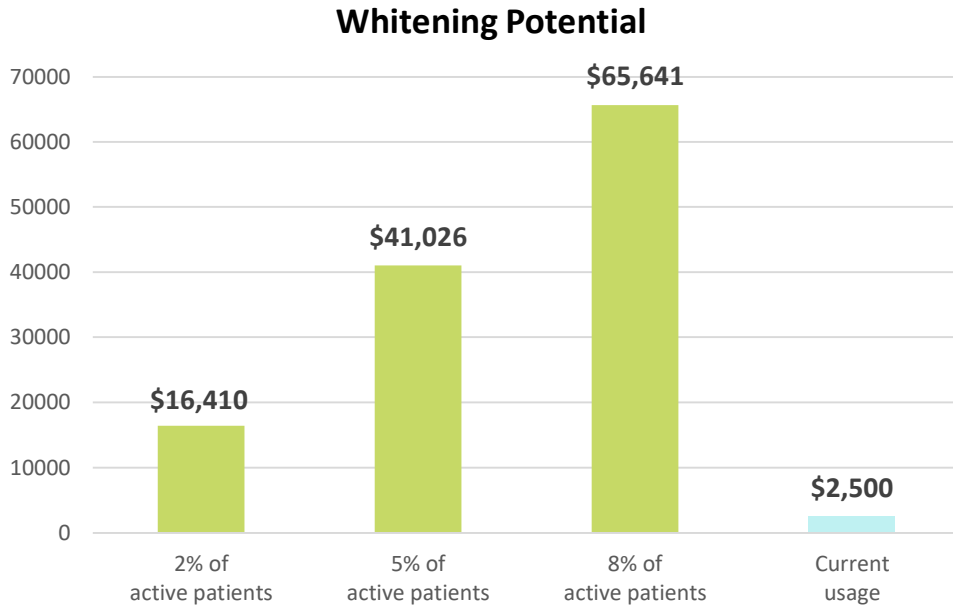


# Dr. Kerry Sample

## Whitening Potential

**Potential Growth Opportunity:  
\$13,910**

Cosmetic dentistry has become increasingly important, with tooth whitening now one of the most requested procedures by patients. Whitening boosts practice revenue, rarely involves insurance, and often leads to increased demand for additional cosmetic procedures. The projections below illustrate the potential increase in production based on 2%, 5%, and 8% acceptance rates relative to your active patient base.



*Based on a 12-month whitening treatment case compared to 80th percentile fee for your zip code.*

### Are you considering enhancing the whitening program in your practice?

When reviewing codes billed each year, we often find a low percentage of whitening services performed. The solution? Take a focused approach to enhancing your whitening program. We can provide you with suggested protocols and successful approaches to promote your whitening offering.





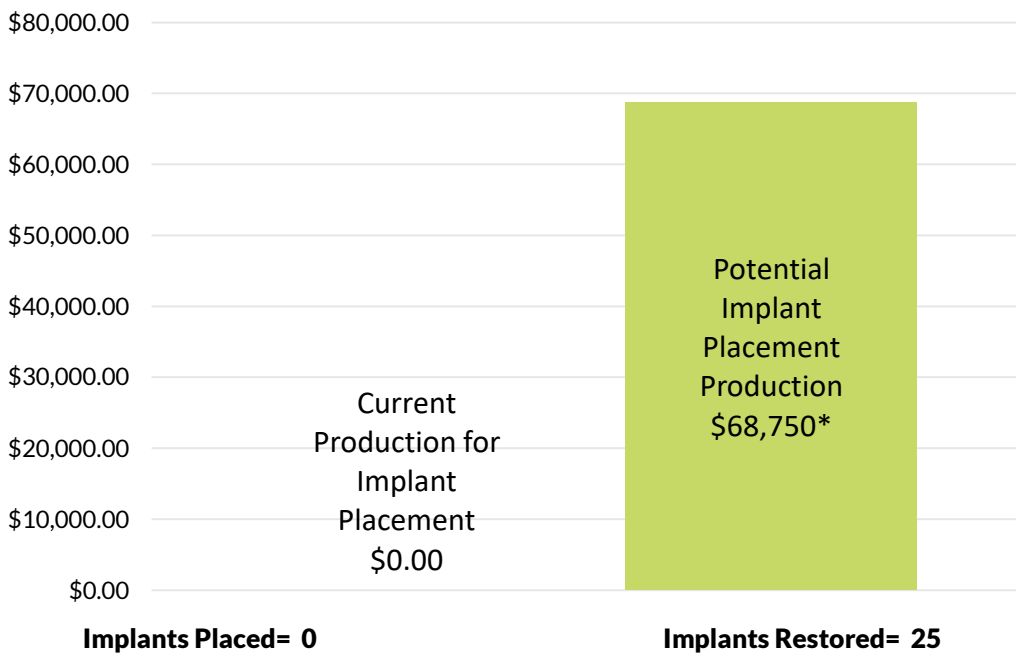
# Dr. Kerry Sample

## Dental Implant Potential

**Potential Growth Opportunity:  
\$68,750**

New technology has increased success rates and the confidence of general practitioners to offer in-house surgical implant placement. The calculation below shows the added production available if placement, in addition to implant restoration codes billed, had been performed. **The calculation reflects current implant placements, if any, that were included on your coding report.** We expect patient acceptance rates, and the number of implants placed, to rise significantly with the convenience of placing them in-house with a trusted provider.

**Data Date Range: 4/1/2025-9/30/2025**



*Includes single implant restoration only, not bridge or implant supported dentures.*

\*Based on 80th percentile fee for your zip code.

### **Are you considering implant placement in your practice?**

We can point you in the right direction for resources and expertise from your Burkhart Equipment Specialist. If you are currently placing implants, but have a lower than ideal case acceptance rate, we offer verbal scripting and strategies to help improve case acceptance rates for implant treatment.

