

Dental metrics pack

Definitions, required fields, source systems, and a suggested report layout for 4 dental metrics. Version 1.0, reviewed 2026-10-20. Worked examples and figures are on each metric page.

Contents

1. Case acceptance rate
2. Collection rate (net collection rate)
3. Hygiene reappointment rate
4. Production per hour

Where this data usually lives

- **Practice management system (PMS)** holds the schedule, procedures, fees, adjustments, treatment plans, and payments. For example: Dentrix and Dentrix Ascend (Henry Schein One), Eaglesoft (Patterson Dental), Open Dental.
- **Insurance clearinghouse and eligibility tools** hold claims, remittances, and payer details, which explain write-offs.
- **Imaging** systems hold x-rays and clinical images. They are rarely needed for these metrics.
- **Payroll or HR** may hold hours actually worked, if the schedule does not.
- **DSO data warehouses** combine data from many locations, sometimes from more than one PMS.

Case acceptance rate

The share of recommended treatment that patients agree to.

Case acceptance rate = treatment accepted (\$) ÷ treatment presented (\$)

Fields

Field	What it means
Treatment plan	A set of recommended procedures for one patient
Presented date	When the plan was shown to the patient
Presented by	Provider or treatment coordinator
Plan items and fees	Procedures on the plan and their fees
Plan status	Presented, accepted, declined, or completed
Linked appointment	The appointment booked for a plan item
Completed date	When the procedure was done

Definitional choices

- **What counts as accepted.** Signed, scheduled, or completed. Each gives a different number. Pick one and document it.
- **Window length.** 30 days is one common choice for routine treatment. Large elective cases may need 60 or 90 days.
- **Partial acceptance.** If patients often accept part of a plan, measure at the procedure level, not the plan level.
- **Who presented.** Record whether the provider or a treatment coordinator presented the plan, or coaching is not possible.

Report layout

- Show the dollar rate and count rate together.
- Break down by plan size band (for example under \$1k, \$1k to \$5k, over \$5k).
- Show only cohorts whose window has closed, or label recent ones as incomplete.
- State the acceptance rule and window at the top of the report.

Full page: metrics.semaphor.cloud/dental/case-acceptance-rate/

Collection rate (net collection rate)

The share of what a practice is actually owed that it collects.

$$\text{Net collection rate} = \text{collections} \div (\text{gross production} - \text{contractual write-offs})$$

Fields

Field	What it means
Procedure and fee	Completed procedures at the practice's full fee
Adjustment type	The kind of adjustment, such as contractual write-off or courtesy
Adjustment amount	The amount adjusted
Payment	A patient or insurance payment, with date and source
Refund	Money returned to a patient or payer
Location	The office

Definitional choices

- **Which adjustments are subtracted.** Only contractual write-offs, or also others. This choice moves the rate the most. Write the list of adjustment types down.
- **Period and lag.** Same period, rolling period, or matched by date of service. Label it.
- **Refunds.** Subtract refunds from collections.
- **Production basis.** Use completed procedures at the practice's full fee.
- **Estimated vs actual write-offs.** Some systems post an estimated write-off at checkout and correct it when the claim pays. Decide which you use.

Report layout

- A headline rolling net collection rate, with the period stated.
- A small waterfall: gross production, contractual write-offs, net production, collected, not yet collected.
- A monthly trend line.
- A table by location for DSOs.

Full page: metrics.semaphor.cloud/dental/collection-rate/

Hygiene reappointment rate

The share of patients seen in hygiene who leave with their next hygiene visit already on the schedule.

Hygiene reappointment rate = hygiene patients with a future hygiene appointment ÷ hygiene patients seen

Fields

Field	What it means
Patient	A unique patient ID
Hygiene visit	A completed visit of a hygiene type, with date and provider
Future appointment	Any later appointment, with its type and date
Appointment created at	When the future appointment was booked
Checkout time	When the patient left, if recorded
Patient status	Active, inactive, moved, or deceased
Location	The office

Definitional choices

- **When booking counts.** Before leaving, same day, or within N days. Pick one and label it.
- **Patients or visits.** Use unique patients so a patient seen twice is not counted twice.
- **Which visit types count as hygiene.** Prophylaxis, periodontal maintenance, and others. Write down the list of procedure codes or appointment types.

- **Exclusions.** Decide whether to exclude patients who are moving, deceased, or referred elsewhere.
- **Cancelled later.** A booked appointment may be cancelled the next week. The rate measures booking at the time, not attendance.

Report layout

- A headline rate with the rule stated, such as "booked before leaving".
- A monthly trend line.
- A table by hygienist and by location.
- A linked list of unbooked patients for the front office.

Full page: metrics.semaphor.cloud/dental/hygiene-reappointment-rate/

Production per hour

The value of dentistry a provider produces for each hour they spend seeing patients.

$$\text{Production per hour} = \text{production} \div \text{clinical hours}$$

Fields

Field	What it means
Provider	Who did the work, and their role
Procedure code	The CDT code for the procedure
Fee	The practice's full fee for the procedure
Status	Completed, scheduled, or treatment planned
Contractual write-off	Fee minus what the insurance plan allows
Schedule block	Provider time, marked clinical, lunch, or admin
Location	The office, and its region for DSOs

Definitional choices

- **Gross or net.** Net is closer to cash. Many practices track both.
- **Scheduled or worked hours.** Scheduled hours are more common and easier to get. Worked hours are more accurate if providers often run late or leave early.
- **Attribution.** Decide whether a procedure counts for the provider who completed it or the one who diagnosed it, and keep it consistent.
- **Averaging daily rates.** Divide total production by total hours. Averaging daily per-hour numbers gives the wrong answer.

- **Completed only.** Scheduled procedures are not production until they are completed.

Report layout

- Show doctors and hygienists in separate charts.
- Show gross and net side by side, or state clearly which one the report uses.
- Use the last four weeks or the last month, not a single day.
- State whether hours are scheduled or worked.

Full page: metrics.semaphor.cloud/dental/production-per-hour/

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Example data is not included. Accounting notes explain the calculation, not policy. Confirm treatment with a CPA.