

AAOE Benchmarking

Data Sources & Reports



Data Sources and Reports Needed for the Benchmarking Survey



■ Electronic Medical Record, Practice Management System, or Billing System

- Provider Details (NPI numbers, practice specialty, partner status, FTE status)
- Production by Provider
 - Gross charges by type of service (surgery, office, office procedures)
 - Net collections by type of service (surgery, office, office procedures)
 - Work RVUs
 - Patient visits
- Production by Payer Mix (gross charges, contractual adjustments, net collections)
- A/R Aging (patient and insurance balances)

■ Provider Compensation Records and Tax Forms

- Compensation Data by Individual
 - W-2 Forms
 - Schedule E (Form 1040) – Partnerships and S Corporations
 - Schedule K-1 (Form 1120S) – Shareholders in a Corporation
 - Schedule C (Form 1040) – Sole Proprietorships
- Earnings from ASC, Real Estate, and Hospital by Individual Physician
- Recruitment Data (starting salary, signing bonus, assistance provided)

■ Payroll, Accounts Payable, and/or General Ledger System

- Chart of Accounts/Profit and Loss Statement
 - Orthopaedics (professional component)
 - Ancillary services (X-Ray, MRI, PT/OT, DME, and Other Ancillaries)
- Revenue (direct and indirect)
- Practice Administrator and Senior Executive Compensation by Individual
 - Position/title
 - Base and bonus compensation
 - Benefit amounts (pension, health insurance, disability insurance, life insurance, car allowance, professional development)
- Employee FTE and Compensation by Department
 - Position/title (designate as revenue generating or not)
 - FTE Status
 - Salaries and wages
 - Employment taxes
 - Employee benefits
- Non-Staff Expenses/Overhead by Department

■ Building and Equipment Information

- Facility lease and layout drawings
- Individual ancillary data
 - Number of imaging machines
 - Square footage

AAOE

American **Alliance**
of Orthopaedic Executives