

# 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

