



AAOE Benchmarking Survey Checklist

- ☐ General practice information and primary contact information
 - Name of practice
 - Mailing address of primary location
 - Name of practice administrator and managing physician
 - Name, title, email, and phone number of primary contact for benchmarking survey
- ☐ Provider identifying and general information
 - NPI number or other identifier
 - Practice specialty
 - Owner/employed status
 - Fellowship training status
 - FTE status
- ☐ Provider productivity
 - Number of Patient visits (new and return)
 - Number of Surgical cases (inpatient and outpatient)
 - Number of Injections
 - Work RVUs
 - Gross Charges
 - Net Collections
- ☐ Physician compensation
 - Basis for compensation
 - Annual compensation
 - ASC earnings
 - Real estate earnings
 - Hospital earnings
 - Other compensation
- ☐ Physician assistant and nurse practitioner compensation and benefits
 - Base compensation
 - Bonus compensation
- ☐ Practice administrator compensation
 - Position
 - FTE status
 - Base compensation

- Bonus compensation
- Basis for bonus
- Other compensation
- Practice administrator benefits
 - Pension
 - Health insurance
 - Disability insurance
 - Life insurance
 - Car allowance
 - Professional development
- Employee salaries and FTEs
 - Revenue Generating Staff
 - Physician Assistants
 - Nurse Practitioners
 - Other revenue generating staff
 - Clinical Support Staff
 - Registered nurses
 - Licensed practical nurses
 - Medical assistants/nurses aides
 - Athletic trainers
 - Other clinical support staff
 - Medical/Technical Staff
 - X-Ray technicians
 - Cast technicians
 - MRI technicians
 - Other medical/technical staff
 - Patient Care Support Staff
 - Medical receptionists
 - Medical secretaries/transcribers/scribes
 - Medical records
 - Other patient care support staff
 - Business Operations Staff
 - General administrative
 - Patient accounting/billing
 - General accounting
 - Technology staff

- Marketing
- Other business operations staff
- Physical Therapy Staff
 - Physical therapist
 - Occupational therapist
 - Certified athletic trainer
 - PT/OT technical
 - Physical therapist assistant
 - Occupational therapist assistant
- Employment taxes
- Employee benefits
- Expenses
 - Medical Expenses
 - Medical equipment
 - Medical supplies
 - Drugs
 - Other
 - Facility Expenses
 - Facility
 - Utilities
 - Maintenance
 - Other
 - Technology Expenses
 - Computer hardware
 - Software
 - Telephone
 - Outsourced IT/technology services
 - Other
 - Marketing Expenses
 - Marketing
 - Outsourced marketing services
 - Professional/Outsourced Services Expenses
 - Billing
 - Accounting

- Transcription/scribes
 - Collections
 - Legal
 - Other
- Office Expenses
 - Supplies
 - Mailing/delivery
 - Furniture and equipment
 - General insurance
 - Personal property tax
 - Other
- Insurance and Officer Compensation
 - Malpractice insurance
 - Physician officer/medical director compensation
- Other Expenses
 - Interest
 - Depreciation
 - Charitable contributions
 - Corporate income tax
 - Other
- Revenue
 - Net patient revenue
 - Other revenue
- Revenue by payer
 - Gross charges
 - Contractual adjustments
 - Net collections
- Insurance and patient balances in accounts receivable
 - 0 – 30 days
 - 31 – 60 days
 - 61 – 90 days
 - 91 – 120 days
 - Greater than 120 days
- Square footage and number of office locations
 - Orthopaedics

- MRI
- PT/OT
- Utilization of X-Rays, MRI, DXA, PT/OT, and DME (including orthotics and prosthetics)
 - Number of machines (x-ray, MRI, and DXA)
 - Number of patients
 - Volume
 - X-ray – number of studies
 - MRI – number of scans
 - DXA – number of tests
 - PT/OT – number of visits
 - DME – number of units sold
- Availability of ancillary services
 - Rheumatology
 - Drug dispensing/pharmacy
 - Lab services
 - Toxicology
 - Urgent care center
 - After hour clinic
 - Bone density testing
 - Fluoroscopy
 - Ultrasound guided injections
 - Diagnostic ultrasound
 - Pain management
 - Spine stimulators
 - Concussion program
 - Stem cell injections
 - PRP injections
- Ambulatory Surgery Center (ASC) ownership
 - Number of facilities majority or partially owned by practice owners
 - Ability to make purchasing decisions
 - Total joint replacements in the ASC
- Recruitment salaries and assistance
 - Starting salary
 - Signing bonus
 - Moving expenses
 - Hospital assistance
 - Salary guarantees

- Bonus determination
- **Additional recruitment questions**
 - Ownership timeline
 - Did you lose candidates to a hospital
 - Compensation for physician president/chair of board of directors
 - Compensation for other administrative physicians
- **End of career**
 - Age physicians must notify practice of anticipated retirement
 - Advance notice for retirement
 - Slow down plan
 - Age able to elect off emergency department call
 - Age able to elect off of group call
 - Age at which physicians must undergo a cognitive and physical exam
- **Call Data**
 - Call type
 - Annual call payments
 - Weekday call payments
 - Weekend day call payments
 - Payment units for on call payments (i.e. per hour, per night, per day)
 - Amount group receives for on call coverage
- **Government Affairs Data**
 - Malpractice insurance coverage limit
 - Malpractice insurance deductibles
 - Malpractice insurance type
 - EMR certification year
 - EMR interoperability status
 - Quality initiatives participating in
 - Telemedicine services
 - Co-management agreements
 - Practice real estate

- Databases and Information Systems Used
 - Practice management system vendor
 - EMR vendor
 - Accounting software vendor
 - Data analytics vendor
 - Payroll vendor
 - PACS vendor