

JCO Practice Study Instructions



In order to more easily complete the 2020 JCO Practice Study, please use the instructions below for specified questions to get answers from your Ortho2 Edge Cloud or ViewPoint system.

Question 46

Edge Cloud – Reference the Referral Analysis Report as needed.

ViewPoint – Reference the Referral Analysis Report as needed.

Question 47

- Number of new patient consultations

Edge Cloud – Run the Kept Procedures Report.

ViewPoint – Run the Kept Procedure Summary Report.

- Number of 2019 consultations who started active treatment in 2019

Edge Cloud – Run the Case Acceptance Report for consults in 2019. Then, run the report again with a subgroup for start date in 2019 to compare numbers.

ViewPoint – Download Case Acceptance Report from the ViewPoint Report Repository at www.ortho2.com, and run it for consults in 2019. Then run the report again with a subgroup for start date in 2019 to compare numbers.

- Number of other patients who started active treatment in 2019 (from observation pool or non-2019 consultation)

Edge Cloud – Run the Kept Appointments Report to find your total starts for the year, and subtract the number from the answer above.

ViewPoint – Run the Kept Procedure Summary Report to find your total starts for the year, and subtract the number from the answer above.

- Number of patients placed on observation in 2019

Edge Cloud – Run the Case Acceptance Report for consults in 2019, and count the people who are in recall.

ViewPoint – Download Case Acceptance Report from the ViewPoint Report Repository at www.ortho2.com, and run it for consults in 2019. Count the people who are in recall.

- Number of 2019 consultations for whom you recommended no treatment

Edge Cloud – Run the Patient List Report with a findings-based subgroup.

ViewPoint – Run the Patient List Report with a findings-based subgroup.

- Number of transfers who began treatment in your office in 2019
Edge Cloud – Run the Patient List Report with a transfer in date subgroup.
ViewPoint – Run the Patient List Report with a transfer in date subgroup.
- Number of 2019 consultations who did not enter practice (either as new patients or in observation pool).
Edge Cloud – Run the Starts and Exams Report, and then subtract the number of starts from the number of exams from 2019.
ViewPoint – Run the Kept Procedure Summary – By Year Report for consults. Then run the same report for actual starts. Calculate the number needed.
- Number of active treatment starts age 18 and older
Edge Cloud – Run the Practice Statistics Report, and use the data in the Patient Starts section.
ViewPoint – Run Patient Name & Status List Report with a subgroup for start date and age ≥ 18 .
- Number of patients in active treatment
Edge Cloud – Run the Practice Statistics Report.
ViewPoint – Run the Status Count Comparison Report for a single day and add up the totals.
- Number of patients in active treatment age 18 and older
Edge Cloud – Run the Practice Statistics Report.
ViewPoint – Run Patient Names by Status Report with subgroup for age ≥ 18 .
- Number of patients on observation
Edge Cloud – Run the Practice Statistics Report.
ViewPoint – Run the Status Count Comparison Report for a single day.

Question 49

- Percentage of patients covered by third-party insurance (not managed care)
Edge Cloud – Run the Accounts Receivable Aging Report twice, once with the settings Exclude Zero Dollar Balances and Exclude Insurance Contracts checked. Then, once again with only Exclude Zero Dollar Balances checked. Compare the two numbers.
ViewPoint – Run the Accounts Receivable Aging Contract Report twice, once with a subgroup for balance > 0 and Contract is Insurance = yes. Then, again with a subgroup for balance > 0 . Compare the two numbers.
- Percentage of patients covered by managed-care plans
Ortho2 does not specifically gather this information in Edge Cloud or ViewPoint. If you know the insurance providers your customers use who fall under this category, you can use the report from the question above and run the numbers.
- Number of working days in which patients were seen in 2019
Edge Cloud – Run the Practice Statistics Report and use the number of Patient Days, found above the Treatment Fees heading.

ViewPoint – Look at the month view in the Grid Scheduler and count up the days.

- Total patient appointments in 2019

Edge Cloud – Run the Kept Procedures Report.

ViewPoint – Run the Kept Procedure Summary Report.

- Total patient emergencies in 2019

Edge Cloud – Run the Kept Procedures Report.

ViewPoint – Run the Kept Procedure Summary Report.

- Total broken appointments in 2019

Edge Cloud – Run the Filtered Appointments Report with the Appointment Status Missed checked.

ViewPoint – Run the Missed Appointments Report.

- Total cancelled appointments in 2019

Edge Cloud – Run the Filtered Appointments Report with the Appointment Status Cancelled checked.

ViewPoint – Please call Software Support at (800) 346-4504 for assistance with this question.

Question 50

- Gross income of practice \$

Edge Cloud – Run the Transaction Summary Report.

ViewPoint – Run the Transaction Summary Report.

- Total operating expense of practice (not including compensation of orthodontist-owners) \$

Ortho2 does not include this information in Edge Cloud or ViewPoint.

- Current delinquent accounts (90+ days overdue) \$

Edge Cloud – Run the Accounts Receivable Aging Report with a subgroup for days past due ≥ 90 .

ViewPoint – Run the Accounts Receivable Aging Report with a subgroup for days past due ≥ 90 .