

## Instructions for the 2023 JCO Survey

34 – Usual case fees. **REPORTS-FINANCIAL** tab - Run the **Case Starts by Start Date** and select dates for last year. As long as you use separate codes to post adults and children, your individual cases will show. You can divide the Gross Fee by the Total for Fee Type to get your average.

39 – Separate Fees. Go to **EDIT, SETUP**, and scroll down to **TRANSACTION TYPES**. This will show the standard fees that you have setup for various procedures.

45 – Revenue by payment type. **REPORTS-FINANCIAL** tab - Run the **Practice Summary** for last year and the totals you need for most of this will be in the **Payments This Period** section. The percentages for Bank plans, Medicaid, and Managed Care will only be shown if you have set those up as payment types.

48 – Referral sources – **REPORTS-REFERRAL** tab. Run the **Referral by Source** report. You can run it with each of the Referral Type categories selected to see Non-Professional, Professional, and Company.

49– A - New Patient Consultations – **REPORTS-SCHEDULING** tab. Run the **Kept Appointments Report** and select your consultation appointment types for last year.

49-B. Active Treatment Starts – **REPORTS-FINANCIALS** tab. Run the **Case Starts by Start Date** report

49-C. Patients placed on observation. **REPORTS-SCHEDULING** tab. – **Monthly New Patient Exams** report will give you the current status. You could export this report to Excel and use all the Patient Statuses that you call “observation.” It will not be accurate if a patient initially went to observation and then changed status again in the same year.

49-D. Patients on observation. **REPORTS-PATIENTS** tab. – **Patients by Patient Status** report will give you the current total number. Select all the Patient Statuses that you call “observation.”

49-E. Patients in active treatment. **REPORTS-PATIENTS** tab. – **Patients by Patient Status** report will give you the current total number.

49-F and G. Use the report from B above.

50 - Percentages covered by 3<sup>rd</sup> party -This can be done via **REPORTS-Data Miner**, the office will need to know what insurance companies they consider managed care. From here you can build a data miner to look for patients with those specific plans to get totals and then manually calculate percentages.

Percentage managed care – same

Number of working days – Review your schedule. This is not tracked in the software but you can display the Weekly Schedule and count the working days.

Total Patient Appointments – **REPORTS-SCHEDULING-Kept Appointments Report**. Select all appointment types. The total will be on the last page.

Total Patient Emergencies – Depends on how you identify emergencies. If you have it as an appointment type or “Comfort Visit,” you can use the Kept Appointments Report with just those items.

Broken Appointments – **REPORTS-SCHEDULING-Patients by Appointment Status**. Select only No-Show.

Canceled Appointments – Same but select all Canceled Appointment Statuses.

50 – Gross Income – I would use whatever your accountant puts on the tax return!

52 – Growth in Active treatment starts - Run **REPORTS-FINANCIAL-Case Starts by Start Date** for both years and compare.

Please contact support with any questions that you might have.

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