

## JCO Guide for Tops Users



## Question 34

### Usual case fees:

#### Access **Matrix > D7 Patient Care Tracking**

- Load the default report (Summary by Status, Phase, & Method)
- Use the > symbols to expand each area of Active Treatment
- Highlight as needed and sort the Age column as needed; the blue bar at the bottom will display the Contract average for that age group/treatment method

Status, Phase, & Method	Pts	Financial Status	Dental Classification	Mos in St...	Next Expected Appt	Next Scheduled Appt	Contract	Tx Start...	Tx End
▼ Invisalign	26								
Matthew Liedholm		Standard	Class I Adolescent...	17-1	110	Separators	\$5,800.00	06/19/2011	
Jacob Baxter		Standard	Class I Adult Dentiti...	18-2	110	Invisalign Delivery	\$5,400.00	05/05/2012	
Marta Koppe		Standard	Class I Adult Dentiti...	19-4	110	Consultation	\$5,800.00	07/11/2011	
Zachary Karnitz		Standard	Class I Adult Dentiti...	19-5	105	Adjustment	\$5,400.00	03/15/2011	
Elizabeth Allison		Standard	Class I Adult Dentiti...	19-6	110	Adjustment	\$6,000.00		
Sarah Capaul		Standard	Class II Adult Dentiti...	19-8	110	Adjustment	\$5,450.00		
Karen Moening		Standard	Class I Adult Dentiti...	19-9	110	Development Ck	\$5,400.00	04/14/2011	
Mason Buechner		Standard	Class I Adult Dentiti...	20-4	110	Separators	\$5,400.00	08/08/2010	
Daniel Orman		Standard	Class I Adult Dentiti...	20-10	110	Adjustment	\$5,400.00	05/05/2011	
Brad Conway		Standard	Class I Adult Dentiti...	20-10	110	Adjustment	\$5,200.00	10/10/2011	
Lindsey Damrow		Standard	Class I Adult Dentiti...	21-3	110	Retainer Check	\$5,800.00	05/27/2008	
Heldi Gramsey		Standard	Class I Adult Dentiti...	21-7	110	Adjustment	\$5,400.00	10/01/2011	
Lynn Besky		Standard	Class II Adult Dentiti...	21-10	110	Retainer Check	\$5,800.00		
Jenelle Hendrickson		Standard	Class I Adult Dentiti...	28-11	103	Adjustment	\$5,400.00	05/05/2011	
Steven McFarland		Standard	Class I Adult Dentiti...	30-8	88	Records	\$5,400.00	04/04/2011	
Michelle Bettcher		Standard	Class I Adult Dentiti...	30-9	110	Appliance Delivery	\$5,400.00	10/11/2010	
Dana Moehne		Standard	Class I Adult Dentiti...	31-3	110	Band Uppers	\$5,800.00	12/22/2011	
Molly McCollum		Standard	Class I Adult Dentiti...	31-4	103	Adjustment	\$5,800.00	07/17/2010	
Patti Bulthaus		Standard	Class II Adult Dentiti...	37-11	92	Adjustment	\$5,000.00	04/04/2010	
Christopher Roberts		Standard	Class III Adult Dentiti...	39-1	110	Deband 3	\$6,800.00	08/27/2011	
Terry Hailey		Standard	Class I Adult Dentiti...	45-2		Adjustment	\$6,000.00	04/26/2014	
> Space Maintainer	3								
> Quad-Helix	1								
> TMD Therapy with Appliances	1								
> RPE	30								
Selection Averages: 21 Selected 25-6 \$5,611.90 20   23 -41   -37 - - - -									
Window Averages: 710 Total 19-0 \$4,611.60 20   23 -34   -34 7 2 1 \$848.70 \$727.20									

## Question 39

#### Access **topsOrtho > Practice Setup > Fee Schedule**

- Click on selected Account Transaction Types to view the fee associated with each one

## Question 45

The percentage of gross revenue attributable to methods of payment:

Access **Reports > Income Analysis**

- Enter date range
- Scroll down to **Payments**
- Revenue is broken down by Cash, Check, Credit Card, Debit Card, Insurance Check, Bank Draft and Insurance Payment

Income Analysis

Orthodontist:  
All Doctors

Office:  
All Offices

Dates  
01/01/2015 To 12/31/2015  
Last Year

Run Report

Income Analysis  
Jan 1, 2015 - Dec 31, 2015

	Patient	Insurance	Total	Future	Charged
<b>Payments</b>					
Cash Payment	13,193.91	0	13,193.91		
Check Payment	297,058.52	0	297,058.52		
Credit Card Payment	172,273.35	0	172,273.35		
Debit Card	105.00	0	105.00		
Payment-Endorsed Ins Ck	7,365.50	0	7,365.50		
Bank Draft	288.00	0	288.00		
Insurance Payment	0	150,797.72	150,797.72		
<b>Total Payments</b>	<b>490,284.28</b>	<b>150,797.72</b>	<b>641,082.00</b>		
<b>Positive Adjustments to Due Amount</b>					
Decr. Expected Ins. Benefit	14,751.87	(14,751.87)	0		
Refund to Ins. Co.	431.50	0	431.50		
Refund to Patient	3,971.05	0	3,971.05		
[+] Data Entry Correction	258.32	0	258.32		
[+] Account Adjustment	1,888.35	0	1,888.35		
<b>Total Positive Adjustments to Due Amount</b>	<b>21,301.09</b>	<b>(14,751.87)</b>	<b>6,549.22</b>		
<b>Negative Adjustments to Due Amount</b>					
Reverse Late Fee	15.00	0	15.00		

## Question 48

### Access **Reports > Referral Analysis**

- Enter date; the report will show 12 months up to date entered
- Can be filtered by Referral Date, Treatment Start Date or Patient First Seen Date

Referrals Analysis (Analyzed by Treatment Start Date)

Referrals Analysis

Date:  
05/04/2016  
Analyze by Referral Date  
Orthodontist:  
All Doctors  
Office:  
All Offices  
Run Report

Referrals Analysis (Analyzed by Treatment Start Date)  
06/2015 - 05/2016 for All Orthodontists in All Offices

Referrer	#	12 Mo. Total	#	06/2015	#	07/2015	#
Randall Johnson	16	54,637.28	3	10,410.00	1	3,500.00	0
Lynn Eliason	12	31,946.75	5	15,796.75	2	5,218.00	0
Robert Ostlund	11	30,779.08	0		0		1
Paul Kirkegaard	8	33,345.00	0		0		6
Robyn Kempainen	8	29,064.10	1	3,048.00	1	3,998.00	0
Todd Grossman	8	28,335.50	2	6,137.00	0		3
Jeff Norsted	7	30,150.00	2	6,704.00	0		0
John Pole	7	28,831.25	0		0		1
Mark Holmes	7	23,481.88	3	6,763.88	1	3,874.50	0
Douglas Walesheck	6	22,397.00	0		1	2,365.00	1
Roger Ollila	6	18,564.02	3	7,606.00	1	3,901.00	0
Ronald Smisek	6	11,400.00	0		0		0
Steve Hagerman	6	7,231.00	0		0		1
Mike Kurkowski	5	15,097.94	0		1	2,720.00	0
Peter Mielke	5	14,204.91	0		0		0
Greg Stende	4	22,893.08	0		1	7,530.00	1
Richard Weimar	4	16,413.60	1	4,449.00	1	3,460.00	0
Richard Prokosch	4	16,089.66	1	3,998.00	0		0
Steven Ager	4	15,505.00	0		0		0
Scott Kaier	4	14,646.00	1	1,841.00	0		0

## Question 49

### A. Number of new-patient consultations:

Access **Reports > Appointments Summary**

- Enter date range
- Select “Run Report”
- Can be filtered By Doctor or By Office
- If there are multiple doctors, add the totals for “New Patient Exam” for each doctor

The screenshot shows a web application window titled "Appointment Summary". On the left, there is a sidebar with a search bar containing "Appointments Summary". Below it, there are radio buttons for "By Doctor" (selected) and "By Office". Underneath, a "Dates" section shows a date range from "01/01/2015" to "12/31/2015" with a dropdown arrow. At the bottom of the sidebar is a "Run Report" button. The main content area has a header "Appointment Summary" with the date range "Jan 1, 2015 - Dec 31, 2015". Below this is a table with two columns: "Procedure Name" and "Count".

Procedure Name	Count
Dr. Robert T. Fuego	379
Main	357
New Patient Exam	122
Records	72
Consultation	53
Adjustment	32
Appliance Delivery	28
Separators	14
Emergency	12
Band Uppers	9
Full Banding	5
Appliance Impression	5
Repo Brackets	3
Retainer Check	1
Development Ck	1
Satellite	22
Consultation	8
New Patient Exam	6
Records	5
Full Banding	1

## B. Number of active treatment starts:

### Access **Matrix > D7 Patient Care Tracking**

- From the filter on the top left, select “Exams...”
- Enter your date range
- All patients seen for exams in selected date range will populate
- Click the **Tx Status** heading to group all “Active Treatment” patients
- Highlight all “Active Treatment” patients and the selected total will display at the bottom in blue

Review Current Patients by Status: Exams

All Doctors

All Tx Coordinators

All Locations

Pending: 0

Active: 71

Exam, Records, Consult: 4

Retention: 345

Observation: 4

Past Min Tx Time: 0

Past Max Tx Time: 1

Patient	Financial Status	Dental Classification	Tx Status	Tx Disposition	Tx Phase	Tx Method	Age	Mos in St...	Next Expected Appt	Next
Unristina winosperger		Class I Adolescent...	Final Retention		Comprehensive Tre...		20-4	106		emerge
Terence Wolkerstorfer		Class I Transitional...	Final Retention				21-1	106		Record
Lee Wolters		Class I Adolescent...	Final Retention		Comprehensive Tre...		17-1	106		
Charles Yates		Class II Adult Dentit...	Final Retention	Continue Active Tre...	Comprehensive Tre...	Fixed Appliances	14-8	14	Band Uppers	Appliar
Greg Theis		Class I Transitional...	Exam Completed		Comprehensive Tre...		14-9	100		Consul
Diana Windsperger		Class I Transitional...	Development Monit...	Schedule Recall Exa...	Monitor Development	Habit Appliance	7-11	14	Development Ck	Develo
Bryan Anderson		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	15-5	104		Record
Joshua Baxter		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	13-9	104		Consul
Michele Chermak		Class I Adult Dentiti...	Active Treatment		Comprehensive Tre...	Fixed Appliances	18-1	102		Consul
Kayla Colling		Class I Transitional...	Active Treatment	Continue Active Tre...	Comprehensive Tre...		12-8	50		
Tyson Deleon		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	17-6	101		Record
Erik Eichler		Class I Transitional...	Active Treatment		Comprehensive Tre...	RPE	13-5	100		Record
Katherine Eleftheriou		Class I Transitional...	Active Treatment		Comprehensive Tre...			104		
Dana Ellis		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances wi...	15-5	104	Separators	Separa
Brianna Galvin		Class I Transitional...	Active Treatment		Limited Treatment		13-1	106		Separa
Rebecca Heglund		Class I Adult Dentiti...	Active Treatment	Continue Active Tre...	Comprehensive Tre...		18-1	106	Development Ck	Develo
Alicia Hinnenkamp		Class I Adolescent...	Active Treatment	Begin Active Treatm...	Comprehensive Tre...	Fixed Appliances	17-4	99	Separators	Consul
Kate Kruger		Class I Adolescent...	Active Treatment		Limited Treatment	RPE	11-5	99	Records	Record
Christina Libby		Class I Transitional...	Active Treatment		Comprehensive Tre...		24-1	106		Adjustr
Britta Lundberg		Class I Transitional...	Active Treatment		Comprehensive Tre...		12-5	100	Records	Consul
Kelly McGowan		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	15-1	92		Consul
Jason Nicoletti		Class I Transitional...	Active Treatment	Continue Active Tre...	Comprehensive Tre...	Fixed Appliances	16-11	105	Appliance Delivery	Adjustr
Mark Niezgocki		Class I Transitional...	Active Treatment		Comprehensive Tre...		15-3	104	Records	Consul
Daniel Nockleby		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	13-3	92	Development Ck	Consul
Daniel Osterbauer		Class I Transitional...	Active Treatment		Comprehensive Tre...		20-3	106	Records	
Suzanne Parks		Class I Adult Dentiti...	Active Treatment	Continue Active Tre...	Comprehensive Tre...		16-11	106	Consultation	Adjustr
*Jeffrey Peltier		Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances	13-9	103	Separators	[Consu
Selection Averages:		20 Selected	15-10	\$4,260.45	23   25	-   -	3	1	-	-
Window Averages:		358 Total	20-2	\$4,891.49	26   27	11   14	3	2	2	\$593.03 \$485.20

0 Patients Checked



## C. Number of patients placed on observation:

### Access **Matrix > D7 Patient Care Tracking**

- From the filter on the top left, select “Exams...”
- Enter date range
- All patients seen for exams in selected date range will populate
- Click the **Tx Status** heading to group all “Development Monitored - Not Ready for Initial Tx” patients
- Highlight all “Development Monitored - Not Ready for Initial Tx” patients and the selected total will display at the bottom in blue
- **(Depending on the status you assign to observation patients, you may need to run the report for “Development Monitored with Retention” or “Development Monitored without Retention” instead of/in addition to this)**

Patient Care Tracking (Review Current Patients by Status: Exams)

Review Current Patients by Status: Exams

All Doctors

All Tx Coordinators

All Locations

Pending: 1

Active: 47

Exam, Records, Consult: 32

Retention: 17

Observation: 10

Past Min Tx Time: 0

Past Max Tx Time: 53

	Patient	Financial Status	Dental Classification	Tx Status	Tx Disposition	Tx Phase	Tx Method	Age	Mos in St...	Next Expected Appt
<input type="checkbox"/>	Meng Smith	Standard	Class I Transitional...	Active Treatment	Continue Active Tre...	Comprehensive Tre...		42-11	96	Adjustment
<input type="checkbox"/>	Joshua Young	Standard	Class I Transitional...	Active Treatment	Schedule Retention...	Limited Treatment		14-10	96	Adjustment
<input type="checkbox"/>	Patricia Shiue	Standard	Class I Adult Denti...	Active Treatment	Schedule Retention...	Comprehensive Tre...	Fixed Appliances	40-4	93	Retainer Check
<input type="checkbox"/>	Ashley Jansen	Standard	Class I Transitional...	Active Treatment	Continue Active Tre...	Comprehensive Tre...	RPE	9-9	92	Adjustment
<input type="checkbox"/>	Corrin Goff	Standard	Class I Adult Denti...	Active Treatment	Schedule Recall Exa...	Comprehensive Tre...		17-5	91	Development Ck
<input type="checkbox"/>	Kaitlin Ross	Standard	Class I Adolescent...	Active Treatment		Comprehensive Tre...	Fixed Appliances wi...	20-1	91	
<input type="checkbox"/>	Jessica Koehler	Standard	Class I Transitional...	Active Treatment		Comprehensive Tre...		11-0	89	
<input checked="" type="checkbox"/>	Leah Smith	Standard	Class I Transitional...	Development Monit...	Schedule Records a...	Comprehensive Tre...				Records
<input checked="" type="checkbox"/>	Mary Kuehl	Standard	Class I Transitional...	Development Monit...	Schedule Records a...	Comprehensive Tre...				Records
<input checked="" type="checkbox"/>	Tanya Flint	Standard	Class I Transitional...	Development Monit...	Continue Active Tre...	Comprehensive Tre...				Appliance
<input checked="" type="checkbox"/>	Ian Vang	Standard	Class I Transitional...	Development Monit...	Schedule Recall Exa...	Comprehensive Tre...		11-9		Development Ck
<input checked="" type="checkbox"/>	Lindsay Hendricks	Standard	Class I Transitional...	Development Monit...	Schedule Records a...	Comprehensive Tre...				Records
<input checked="" type="checkbox"/>	Kellie Johnson	Standard	Class I Transitional...	Development Monit...		Comprehensive Tre...		4-1		
<input checked="" type="checkbox"/>	Karen Groven	Standard	Class I Transitional...	Development Monit...	Schedule Records a...	Comprehensive Tre...				Records
<input type="checkbox"/>	David Smith	Standard	Class I Adolescent...	Dismissed Indefinit...	Schedule Records a...	Comprehensive Tre...	Fixed Appliances	13-5	98	Records
<input type="checkbox"/>	Nicolette Hoelscher	Standard	Class I Adult Denti...	Exam Completed		Comprehensive Tre...	Fixed Appliances	18-5	105	
<input type="checkbox"/>	Amanda Verhulst	Standard	Class I Transitional...	Exam Completed		Comprehensive Tre...		17-1	103	
<input type="checkbox"/>	Karli Hulse	Standard	Class I Adolescent...	Exam Completed	Begin Active Treatm...	Comprehensive Tre...		16-9	100	Band Uppers
<input type="checkbox"/>	Matthew Grant	Standard	Class I Adolescent...	Exam Completed	Schedule Records	Comprehensive Tre...	Fixed Appliances	16-0	100	Records
<input type="checkbox"/>	Michelle Richert	Standard	Class I Transitional...	Exam Completed	Begin Active Treatm...	Comprehensive Tre...		15-10	100	Full Banding
<input type="checkbox"/>	Donald Smith	Standard	Class I Transitional...	Exam Completed		Comprehensive Tre...			99	
<input type="checkbox"/>	Yvonne Trinka	Standard	Class I Transitional...	Exam Completed	Continue Active Tre...	Comprehensive Tre...			95	Band Uppers
<input type="checkbox"/>	Ann Hains	Standard	Class I Transitional...	Exam Completed	Schedule Records	Comprehensive Tre...		14-4	92	Records
<input type="checkbox"/>	Elissa Lunder	Standard	Class I Transitional...	Exam Completed	Begin Active Treatm...	Comprehensive Tre...		10-2	92	
<input type="checkbox"/>	Elise Vang	Standard	Class I Transitional...	Exam Completed	Schedule Records a...	Comprehensive Tre...		10-4	91	Records
<input type="checkbox"/>	Danielle Taylor	Standard	Class I Adolescent...	Exam Completed		Comprehensive Tre...		12-5	89	

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#### D. Number of total patients on observation:

##### Access **Matrix > Patients**

- Check the box on the top left for “Tx Status”
- Select “Development Monitored - Not Ready for Initial Tx” **(depending on the status you assign to observation patients, you may need to run the report for “Development Monitored with Retention” or “Development Monitored without Retention” instead of/in addition to this)**
- Note the total of patients in observation status on the bottom left

The screenshot shows the 'Patient List' application window. At the top, there is a 'Custom Search...' dropdown menu. Below it, there are several filter options: 'Tx Status' (checked, set to 'Development Mon'), 'Tx Phase' (set to 'Any Tx Phase'), 'Birthdate' (set to 'Next Month'), 'Minors/Adults' (set to 'Any Age'), 'Extended Treatment' (unchecked), and 'Current Patient/Dismissed' (set to 'All Patients'). The 'Office' and 'Orthodontist' dropdowns are set to 'All Offices' and 'All Orthodontists' respectively. A message box is displayed in the center of the table area, stating: 'You've changed the search criteria. Click "Search" to find patients that match the new criteria.' The message box has two buttons: 'Hide This Message' and 'Search'. The table below the filters is empty, with columns for 'Chart ID', 'Patient First Name', 'Patient Last Name', and several empty columns. At the bottom right of the window, there is a small icon and the text 'All Patients'.



#### **E. Number of total patients in active treatment:**

Access **Matrix > Patients**

- From the filter on the top left, check the box “Tx Status” and select “Active Treatment” from the dropdown menu
- Click “Search”
- The total number of active treatment patients will display in bottom left of report

#### **F. Number of active treatment starts age 18 and older:**

Access **Matrix > D7 Patient Care Tracking**

- From the filter on the top left, select “Case Starts...”
- Enter date range
- All patients who started treatment in selected date range will populate
- Click the “Age” heading to sort patients from youngest to oldest
- Highlight all the patients 18 and older and the blue bar at the bottom will tell you how many you have selected

## G. Number of total patients in active treatment age 18 and older

### Access **Matrix > Patients**

- From the filter on the top left, check the box “Tx Status” and select “Active Treatment” from the dropdown menu
- Check the box “Minors/Adults” and select “Adults” from the dropdown menu
- Click “Search”
- The total number of active treatment adult patients will display in bottom left of report

The screenshot shows a software window titled "Patient List". At the top, there is a "Custom Search..." field with a dropdown arrow. To its right are two filters: "Office: All Offices" and "Orthodontist: All Orthodontists", both with dropdown arrows and a share icon. Below these are two columns of checkboxes and dropdown menus. The first column has "Tx Status: Active Treatment" (checked), "Tx Phase: Any Tx Phase" (unchecked), and "Birthday: Next Month" (unchecked). The second column has "Minors/Adults: Adults" (checked), "Extended Treatment" (unchecked), and "Current Patient/Dismissed: All Patients" (unchecked). Below the filters is a table with columns: "Chart ID", "Patient First Name", "Patient Last Name", and three empty columns with dropdown arrows. A green message box is overlaid on the table, stating: "You've changed the search criteria. Click 'Search' to find patients that match the new criteria." It has two buttons: "Hide This Message" and "Search". At the bottom right of the window, there is a status bar with an icon and the text "All Patients".

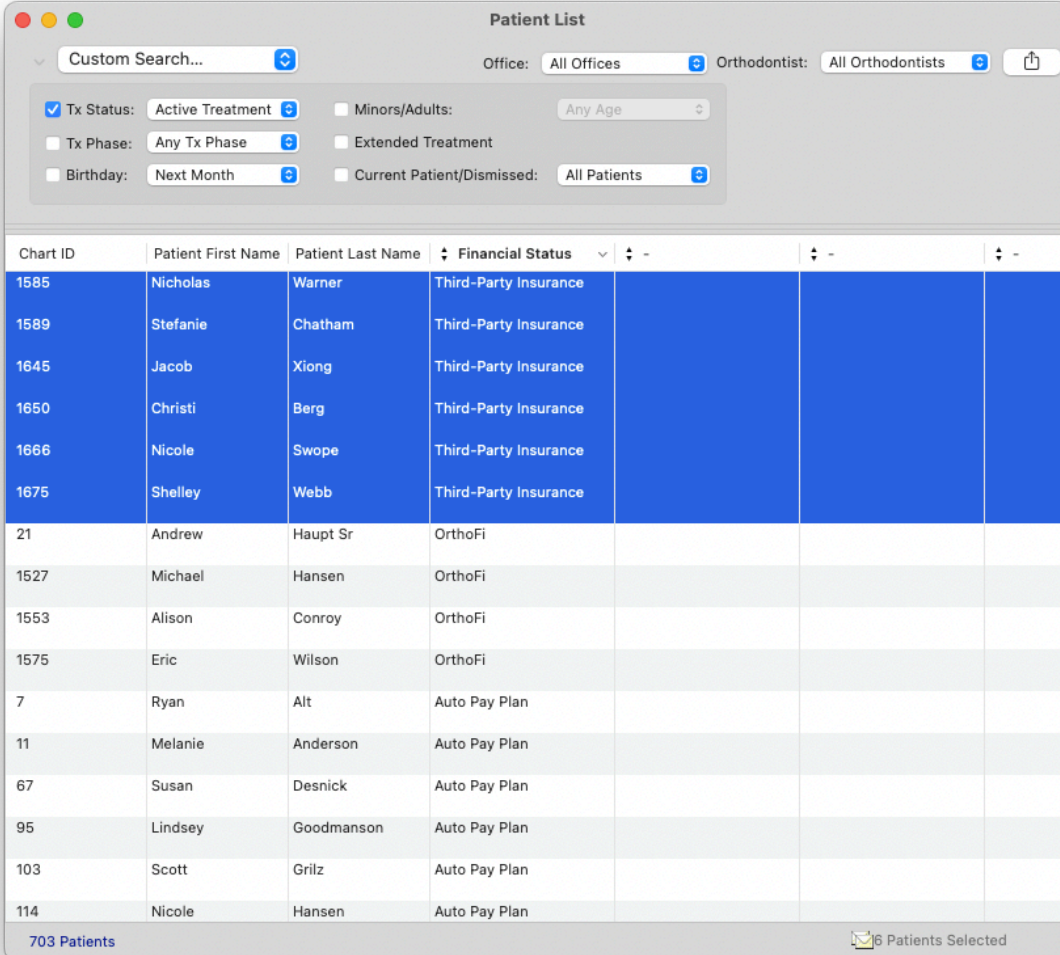
## Question 50

### Percentage of patients covered by third-party insurance (not managed care):

If a practice makes use of the Financial Status feature (and assigns patients as “Third-party Insurance” for example) they can access this information:

#### Access **Matrix > Patients**

- From the filter on the top left, check the box “Tx Status” and select “Active Treatment” from the dropdown menu
- Click “Search”
- Select “Financial Status” from the dropdown menu
- Click the “Financial Status” heading to group similar statuses together
- Highlight the patients with “Third-Party Insurance” status and the total highlighted will show on the bottom right
- Use this number and the total number on the bottom left to calculate the percentage



The screenshot shows a software interface titled "Patient List". At the top, there is a "Custom Search..." field and two dropdown menus for "Office" (set to "All Offices") and "Orthodontist" (set to "All Orthodontists"). Below these are filter options: "Tx Status" (checked, set to "Active Treatment"), "Tx Phase" (set to "Any Tx Phase"), "Birthday" (set to "Next Month"), "Minors/Adults" (set to "Any Age"), "Extended Treatment" (unchecked), and "Current Patient/Dismissed" (set to "All Patients").

The main table has columns: "Chart ID", "Patient First Name", "Patient Last Name", "Financial Status", and three empty columns with sort icons. The table lists 18 patients. The first 6 patients are highlighted in blue, indicating they are selected. These 6 patients all have a "Financial Status" of "Third-Party Insurance". The remaining 12 patients have other statuses: 3 "OrthoFi", 3 "Auto Pay Plan", and 6 "Auto Pay Plan".

At the bottom left, it says "703 Patients". At the bottom right, it says "6 Patients Selected".

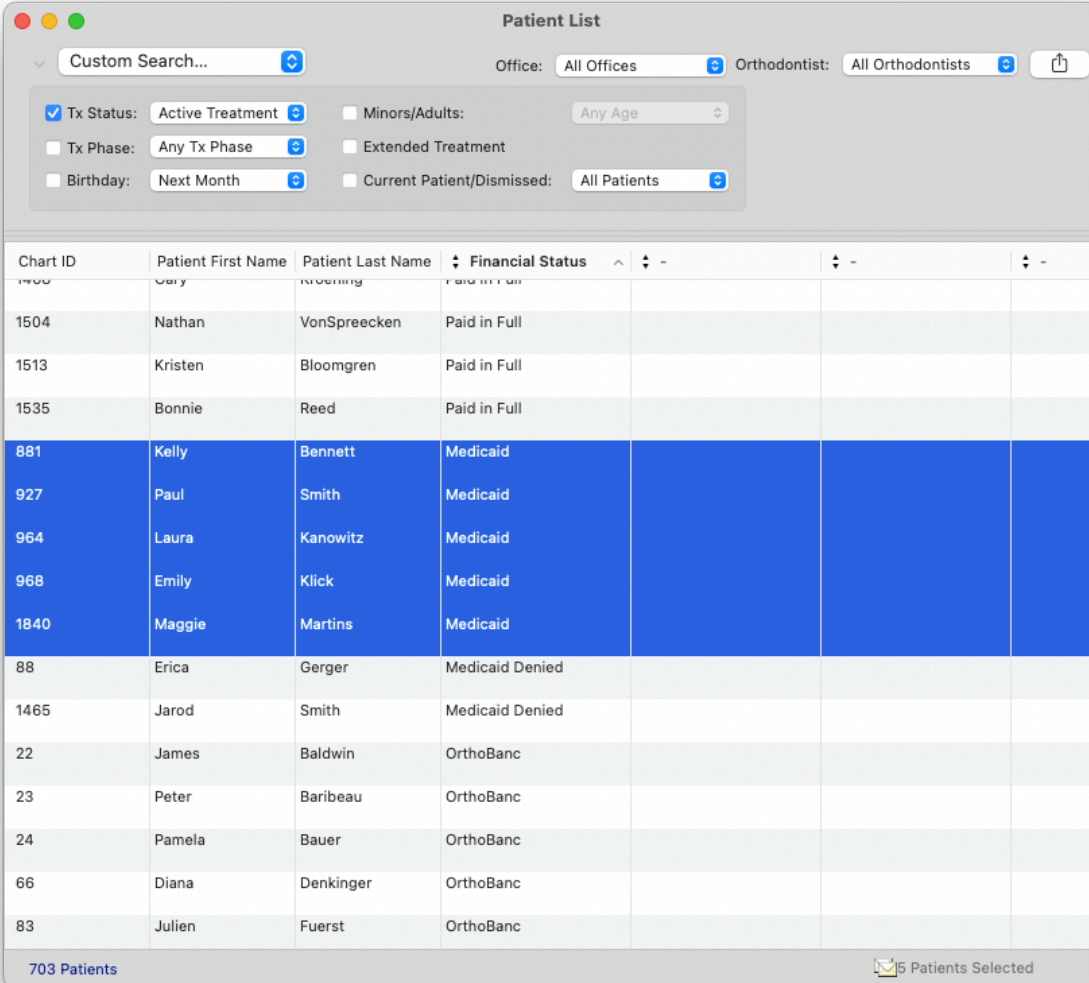
Chart ID	Patient First Name	Patient Last Name	Financial Status			
1585	Nicholas	Warner	Third-Party Insurance			
1589	Stefanie	Chatham	Third-Party Insurance			
1645	Jacob	Xiong	Third-Party Insurance			
1650	Christi	Berg	Third-Party Insurance			
1666	Nicole	Swope	Third-Party Insurance			
1675	Shelley	Webb	Third-Party Insurance			
21	Andrew	Haupt Sr	OrthoFi			
1527	Michael	Hansen	OrthoFi			
1553	Alison	Conroy	OrthoFi			
1575	Eric	Wilson	OrthoFi			
7	Ryan	Alt	Auto Pay Plan			
11	Melanie	Anderson	Auto Pay Plan			
67	Susan	Desnick	Auto Pay Plan			
95	Lindsey	Goodmanson	Auto Pay Plan			
103	Scott	Grilz	Auto Pay Plan			
114	Nicole	Hansen	Auto Pay Plan			

## Percentage of patients covered by managed-care plans:

If a practice makes use of the Financial Status feature (and assigns patients as “Medicaid” for example) they can access this information:

### Access **Matrix > Patients**

- From the filter on the top left, check the box “Tx Status” and select “Active Treatment” from the dropdown menu
- Click “Search”
- Select “Financial Status” from the dropdown menu
- Click the “Financial Status” heading to group similar statuses together
- Highlight the patients with “Medicaid” status and the total highlighted will show on the bottom right
- Use this number and the total number on the bottom left to calculate the percentage



The screenshot shows a 'Patient List' window with a search filter on the top left. The filter is set to 'Tx Status: Active Treatment'. The table below lists patients with their Chart ID, First Name, Last Name, and Financial Status. The 'Financial Status' column is sorted, and the 'Medicaid' status is highlighted in blue. The bottom of the window shows '703 Patients' and '15 Patients Selected'.

Chart ID	Patient First Name	Patient Last Name	Financial Status			
1504	Nathan	VonSprecken	Paid in Full			
1513	Kristen	Bloomgren	Paid in Full			
1535	Bonnie	Reed	Paid in Full			
881	Kelly	Bennett	Medicaid			
927	Paul	Smith	Medicaid			
964	Laura	Kanowitz	Medicaid			
968	Emily	Klick	Medicaid			
1840	Maggie	Martins	Medicaid			
88	Erica	Gerger	Medicaid Denied			
1465	Jarod	Smith	Medicaid Denied			
22	James	Baldwin	OrthoBanc			
23	Peter	Baribeau	OrthoBanc			
24	Pamela	Bauer	OrthoBanc			
66	Diana	Denkinger	OrthoBanc			
83	Julien	Fuerst	OrthoBanc			

703 Patients 15 Patients Selected

## Number of working days in which patients were seen:

### Access **Reports > Practice Monitor**

- Use the < > buttons to move from month to month and the << >> buttons to move from year to year
- The number of Patient Days can be found on the bottom left corner
- Add up the Patient Days for the desired time period

Practice Monitor					
April 2016					
<< < > >>					
All Offices					
All Doctors					
# Accounts with Balance	437	% Case Acceptance	3.51%	\$ Prev Accts Rec	418070.27
# Accounts Overpaid +	12	% Accept 3 Mon Avg	4.17%	\$ Production +	883969.00
# Accounts Total =	449	# New Starts	2	\$ Collections -	588382.37
# Delinquent Accounts	60	# Case Finishes	16	\$ [+] Contract Adj +	0
% Del Accts/Accts w Bal	13.73%	# Starts/Finishes	0.1	\$ [-] Contract Adj -	0
		# Active Cases	763	\$ [+] Adjustments +	10674.72
# Active Adults	780	# Adult Full Tx Cases	0/149	\$ [-] Adjustments -	7272.00
# Active Children	1,127	# Child Full Tx Cases	2/385	\$ Accounts Rec =	717,059.62
# Extended Tx	20	# Child Phase II Cases	0/0	% Collection/Production	66.56%
# Past Due Recalls	5	# Child Phase I Cases	0/14	% Accts Rec/Production	81.12%
# Recall Patients	0	# Invisalign Cases	0/0		
# Active Pts - No Appt or No Recall	1,107	# Limited Cases	0/29	\$ Accounts Rec	717,059.62
		# SureSmile Cases	0/0	\$ Expected Ins	145051.29
# Referrals-In	0	# Surgical Cases	0/0	\$ Future Due	134107.33
# Dentist Referrals-In	0	# TMD Cases	0/0	\$ Pre-Paid	(5097.66)
% Dentist Referrals-In	0.00%	# Contracts	459	\$ Current & Past Due	53,278.66
% Dent Refer-In 3Mon	0.00%	Avg Adult Fee-Full Tx	0	\$ 0 - 30	5236.90
		Avg Child Fee-Full Tx	5,400.00	\$ 30 - 60	8173.90
# Sched. Appointments	428	Avg Child Fee-Phase II	0	\$ 60 - 90	4218.40
# Failed Appointments	23	Avg Child Fee-Phase I	0	\$ 90+	35649.46
# Sched. Emergencies	41	Avg Invisalign Fee	0	\$ Charges	672696.71
# Unsched. Emergencies	0	Avg Limited Tx Fee	0	\$ Charges 6 Mon Avg	137084.33
# New Patient Exams	57	Avg SureSmile Tx Fee	0	\$ Collections	588382.37
# Patient Days	18	Avg Surgical Tx Fee	0	% Collection/Charges	87.47%
		Avg TMD Tx Fee	0	% CurAccRec/Charges	106.59%

**Total patient appointments for the year:**

Access **Reports > Appointments Summary This Month**

- Enter date range
- Click “Run Report”
- Scroll to the bottom of the report for the appointment total

**Total patient emergencies for the year:**

Access **Reports > Practice Monitor**

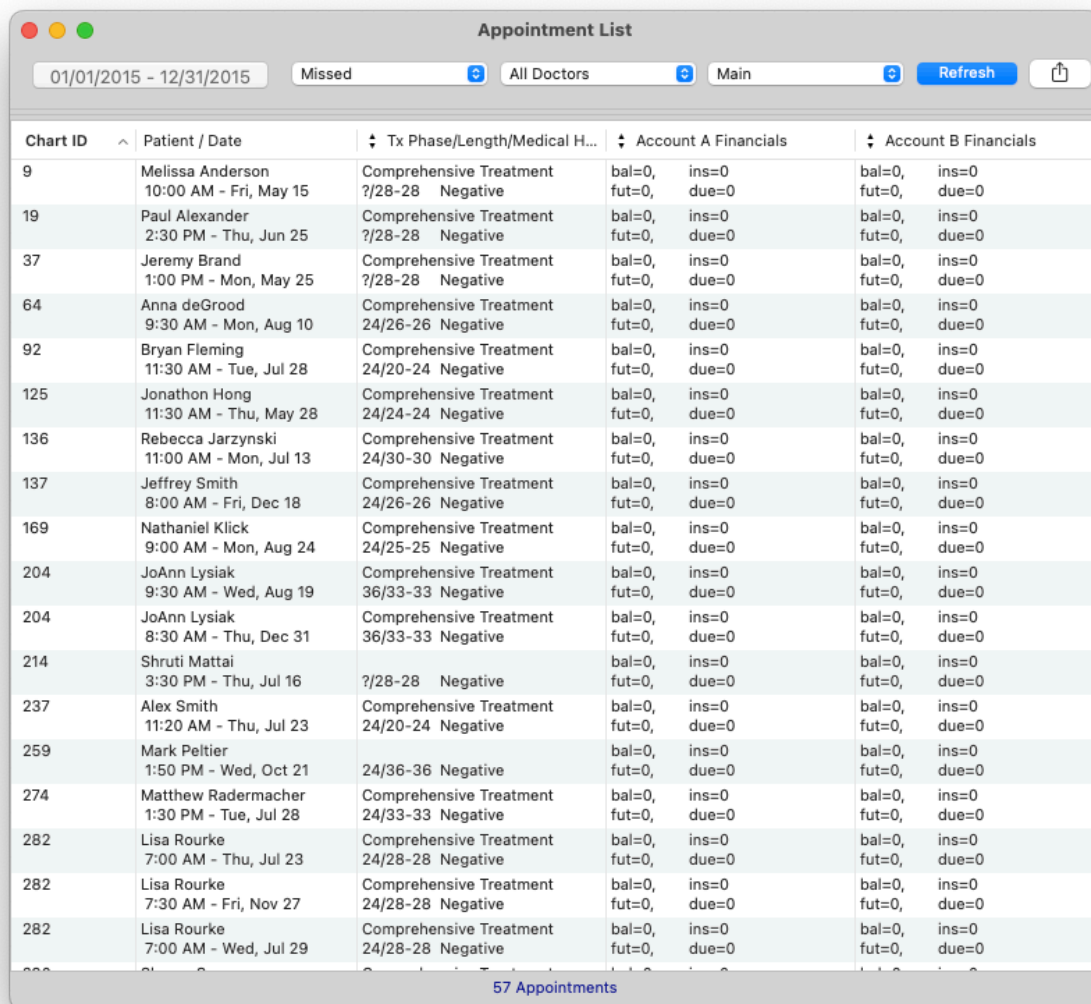
- Use the < > buttons to move from month to month and the << >> buttons to move from year to year
- The number of “Scheduled Emergencies” and the number of “Unscheduled Emergencies” can be found on the bottom left corner
- Add up the emergency appointments for the desired time period



## Total broken appointments for the year:

### Access **Matrix > Appointments**

- Enter date range
- Change the filter on the top left of the report from “Scheduled” to “Missed”
- Make sure the office filter at the top right is set to the desired location, or to all locations
- Click “Refresh”
- The total number of missed appointments will show on the bottom of the report



The screenshot shows a web application window titled "Appointment List". At the top, there is a filter bar with the date range "01/01/2015 - 12/31/2015", a dropdown menu set to "Missed", another dropdown set to "All Doctors", and a dropdown set to "Main". There are "Refresh" and "Share" buttons on the right. Below the filter bar is a table with 5 columns: "Chart ID", "Patient / Date", "Tx Phase/Length/Medical H...", "Account A Financials", and "Account B Financials". The table contains 28 rows of appointment data, all of which are marked as "Missed". At the bottom of the table, it says "57 Appointments".

Chart ID	Patient / Date	Tx Phase/Length/Medical H...	Account A Financials	Account B Financials
9	Melissa Anderson 10:00 AM - Fri, May 15	Comprehensive Treatment 7/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
19	Paul Alexander 2:30 PM - Thu, Jun 25	Comprehensive Treatment 7/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
37	Jeremy Brand 1:00 PM - Mon, May 25	Comprehensive Treatment 7/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
64	Anna deGrood 9:30 AM - Mon, Aug 10	Comprehensive Treatment 24/26-26 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
92	Bryan Fleming 11:30 AM - Tue, Jul 28	Comprehensive Treatment 24/20-24 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
125	Jonathon Hong 11:30 AM - Thu, May 28	Comprehensive Treatment 24/24-24 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
136	Rebecca Jarzynski 11:00 AM - Mon, Jul 13	Comprehensive Treatment 24/30-30 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
137	Jeffrey Smith 8:00 AM - Fri, Dec 18	Comprehensive Treatment 24/26-26 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
169	Nathaniel Klick 9:00 AM - Mon, Aug 24	Comprehensive Treatment 24/25-25 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
204	JoAnn Lysiak 9:30 AM - Wed, Aug 19	Comprehensive Treatment 36/33-33 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
204	JoAnn Lysiak 8:30 AM - Thu, Dec 31	Comprehensive Treatment 36/33-33 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
214	Shruti Mattai 3:30 PM - Thu, Jul 16	7/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
237	Alex Smith 11:20 AM - Thu, Jul 23	Comprehensive Treatment 24/20-24 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
259	Mark Peltier 1:50 PM - Wed, Oct 21	24/36-36 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
274	Matthew Radermacher 1:30 PM - Tue, Jul 28	Comprehensive Treatment 24/33-33 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
282	Lisa Rourke 7:00 AM - Thu, Jul 23	Comprehensive Treatment 24/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
282	Lisa Rourke 7:30 AM - Fri, Nov 27	Comprehensive Treatment 24/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0
282	Lisa Rourke 7:00 AM - Wed, Jul 29	Comprehensive Treatment 24/28-28 Negative	bal=0, ins=0 fut=0, due=0	bal=0, ins=0 fut=0, due=0

## Total canceled appointments for the year:

### Access **Matrix > Appointments**

- Enter date range
- Change the filter on the top left of the report from “Scheduled” to “Cancelled by Patient”
- Make sure the office filter at the top right is set to the desired location, or to all locations
- Click “Refresh”
- The total number of missed appointments will show on the bottom of the report
- Repeat the steps above for appointments “Cancelled by Practice”
- Add the two totals to get total number of cancelled appointments

## Question 51

### Gross income of practice \$

### Access **Reports > Income Analysis**

- Enter date range
- Scroll down to **Payments**
- The total payments made to practice by patients and insurance shows at the bottom of this section

Income Analysis						
May 1, 2016 - May 4, 2016						
	Patient	Insurance	Total	Future	Charged	Total
<b>Payments</b>						
Cash Payment	16,229.44	0	16,229.44			
Check Payment	42,573.00	0	42,573.00			
Credit Card Payment	7,644.00	0	7,644.00			
Insurance Payment - Check	0	1,604.10	1,604.10			
Insurance Payment - Direct Deposit	0	20.00	20.00			
<b>Total Payments</b>	<b>66,446.44</b>	<b>1,624.10</b>	<b>68,070.54</b>			
<b>Positive Adjustments to Due Amount</b>						
Decr. Expected Ins. Benefit	14,584.23	(14,584.23)	0			
Refund to Patient	112.50	0	112.50			
[+] Account Adjustment	125.00	0	125.00			
<b>Total Positive Adjustments to Due Amount</b>	<b>14,821.73</b>	<b>(14,584.23)</b>	<b>237.50</b>			
<b>Negative Adjustments to Due Amount</b>						
Reverse Late Fee	45.00	0	45.00			
[-] Account Adjustment	13,884.36	0	13,884.36			
Bad Debt Write-Off	127.00	0	127.00			
Balance Forward	1,476,219.61	57,804.98	1,534,024.59			
Family Discount	200.00	0	200.00			

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

This information is not available in Tops.

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

Access **Reports > Accounts Receivable**

- Enter date range
- Click “Run Report”
- Click on the 90+ header to load all amounts at top of list

Accounts Receivable

Orthodontist:  
All Orthodontists

Office:  
All Offices

Date:  
05/04/2016

Run Report

Accounts Receivable

All Orthodontists, All Offices, 05/04/2016

Accounts963523.43

Expected Insurance184067.98

Total Past Due55539.29

Future Due735777.41

0-309139.72

Prepaid(11861.25)

30-608736.80

60-902485.50

90+35177.27

Patient	Account	Total Bal	Future Due	Exp Ins	Total Due Now	0-30	30-60	60-90	90+
Janelle Smith	Mark Smith	1,625.00	526.00		1,099.00	157.00	309.00	5.00	628.00
Hayley Borgstrom	Daniel Hoelscher	3,922.00	567.00	2,500.00	855.00	86.00	86.00	86.00	597.00
Matthew Garoutte	Brian Danner	1,779.80	739.50		1,040.30	152.90	295.80		591.60
Sarah Martins	Josephine Deleo	2,040.00	1,250.00		790.00	10.00	270.00		510.00
Sarah Tane	Deborah Tane	1,166.00	176.00		990.00	165.00	165.00	165.00	495.00
Andrew Abrahamson	Harold Ager	3,517.00	2,579.00		938.00	177.00	344.00		417.00
Aaron Aardvark	Aaron Aardvark	3,288.00	1,979.00	1,000.00	309.00	5.00	5.00	5.00	294.00
Jonathan DeLeo	Anthony DeLeo	2,660.50	2,035.00	0.50	625.00	10.00	390.00		225.00
Ann Galman	Thomas Galman	2,284.60	350.00	1,550.60	384.00	64.00	64.00	64.00	192.00
Jarod Smith	MJ Smith	3,419.00	2,015.00	1,076.00	328.00	53.00	110.00	5.00	160.00
Fred Flintstone	Frederick Flinstone	4,500.00	3,347.83	1,000.00	152.17				152.17
Anina Schwartz	Lynn Schwartz	1,583.00		1,453.00	130.00	5.00	5.00	5.00	115.00
Katie Samson	Len Samson	127.00			127.00	5.00	5.00	5.00	112.00
Alyssa Butkowski	Patrick Butkowski	928.20		830.20	98.00	5.00	5.00	5.00	83.00
Caitlin Stawnychy	Kevin Stawnychy	67.50			67.50	5.00	5.00	10.00	47.50
Heather Kurysh	Marcine Neubauer	18.00			18.00				18.00
Katie Kassner	Mary Kassner	183.00		173.00	10.00				10.00
Rebecca Acciani	Rebecca Agness	1,246.00	300.00		946.00	155.00	791.00		
Justin Maher	Tim Maher	780.00			780.00	780.00			
Joshua Phillippi	James Phillippi	669.60			669.60	669.60			
Arriann Fahey	Millie Scarpelli	5,000.00	1,425.00	3,000.00	575.00	575.00			
Isaac Van Massenhove	Thomas Van Massen...	4,969.72	2,100.00	2,500.00	369.72	369.72			