

JCO Practice Study Instructions



In order to more easily complete the 2025 JCO Practice Study, please use the instructions below for specified questions to get answers from your Ortho2 Edge Cloud or ViewPoint system.

Question 48

Edge Cloud – Reference the Referral Analysis Report. You can select the referral type, professional, patient, and other to break down the data.

ViewPoint – Reference the Referral Analysis Report as needed.

Question 49

- Number of new patient consultations in 2024

Edge Cloud – Run the Kept Procedures Report.

ViewPoint – Run the Kept Procedure Summary Report.

- Number of active treatment in starts in 2024

Edge Cloud – Run the Kept Appointments Report to find your total starts for the year.

ViewPoint – Run the Kept Procedure Summary Report to find your total starts for the year.

- Number of patients placed on observation in 2024 (not total pool, just those placed in 2024)

Edge Cloud – Run the Status Changes Report in Edge. Under New Statuses, choose the Observation Status.

ViewPoint – Download Case Acceptance Report from the ViewPoint Report Repository at support.ortho2.com, and run it for Exams and consults in 2024. Count the people who were placed in observation.

- Number of total patients on observation

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 total 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 active treatment starts age 18 and older in 2024

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 total 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 .
- Percentage of total patients in active treatment treated with aligners (at all during treatment)
Edge Cloud – Run the Practice Statistics Report. If you don't track aligners by status, contact the Software Support Team at 800.346.4504 for assistance finding these numbers.
ViewPoint – Run the Status Count Comparison Report for a single day and add up the totals. If you don't track aligners by status, contact the Software Support Team at 800.346.4504 for assistance finding these numbers.
- Percentage of total patients in active treatment age 18 or older treated with aligners (at all during treatment)
Edge Cloud – Run the Practice Statistics Report. If you don't track aligners by status, contact the Software Support Team at 800.346.4504 for assistance finding these numbers.
ViewPoint – Run Patient Names by Status Report with subgroup for age ≥ 18 . If you don't track aligners by status, contact the Software Support Team at 800.346.4504 for assistance finding these numbers.

Question 50

- 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
Ortha2 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 2024
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 2024
Edge Cloud – Run the Kept Procedures Report.
ViewPoint – Run the Kept Procedure Summary Report.
- Total patient emergencies in 2024
Edge Cloud – Run the Kept Procedures Report.

ViewPoint – Run the Kept Procedure Summary Report.

- Total broken appointments in 2024

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

ViewPoint – Run the Missed Appointments Report.

- Total cancelled appointments in 2024

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 51

- 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 .