Dolphin Management
JCO Survey 2025
Configuration and User's Guide

January 2025

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Introduction

This document describes how to enable and run the JCO Orthodontic Practice Study report, which we developed to help customers complete the 2025 JCO Orthodontic Study. Using data from Dolphin Management, this report provides answers to the following JCO Orthodontic Study questions

- 47 (a, b, c)
- 47 (d, j)
- 47 (e)
- 47 (f)
- 47 (g)
- 49 (a)
- 49 (b)
- 49 (c)
- 49 (e)
- 49 (f)
- 49 (g)

Not all questions require you to input report filters.

JCO Report Installer

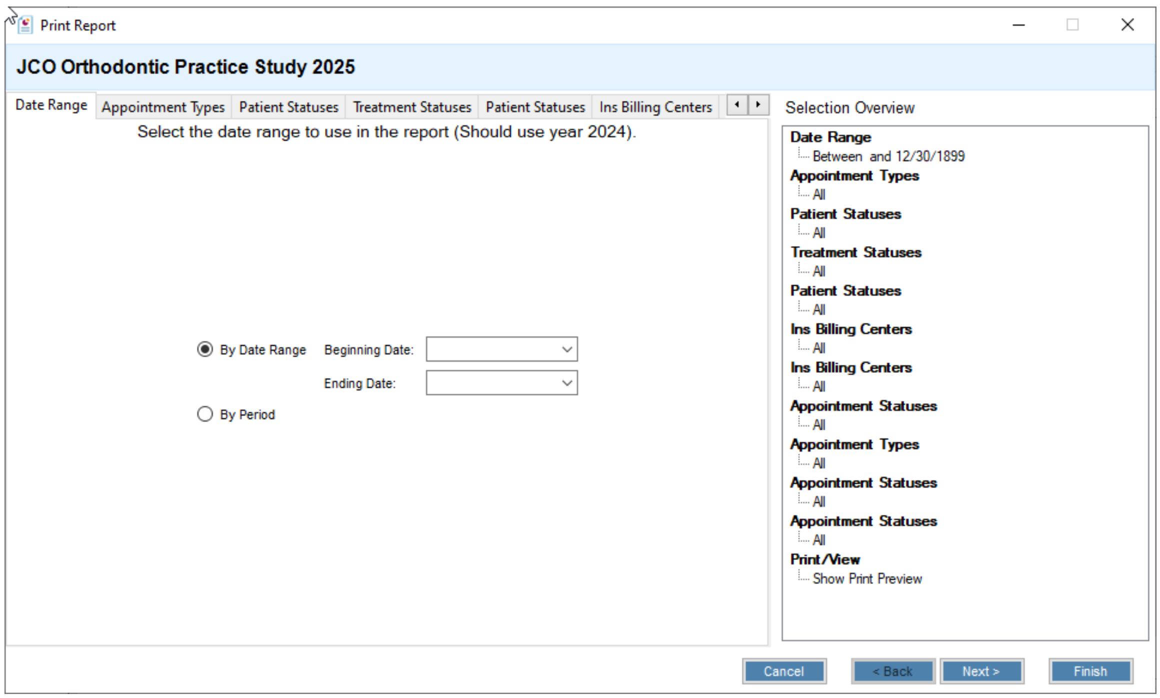
The 2025 JCO Orthodontic Practice Study report is available on Dolphin's Website.
You must run the installer on one machine only. The report will be available from any machine running Dolphin.

Running the JCO Orthodontic Practice Study Report

To run the JCO Report:

1. From the **Reports** menu, select **Reports**.
2. Click the Other tab.
3. Double-click the **JCO Orthodontic Practice Study - 2025** report.

   The Print Report dialog box for the JCO Orthodontic Practice Study report opens, and the Date Range tab is selected.



4. Click the **By Period** radio button, and select **Last Year** from the drop-down menu.
5. Click the Appointment Types tab.
6. Click the **Multi-Select Items** button.

   The Appointment Type Lookup dialog box opens.
7. Click to select those appointment types that your practice designates as new patient consultations.
8. Click **OK**.
9. Click the first Patient Statuses tab.

10. Click the **Multi-Select Items** button.

    The Patient Status Lookup dialog box opens.

11. Click to select those patient statuses that your practice counts as Observation statuses.

12. Click **OK**.

13. Click the second Patient Statuses tab.

14. Click the **Multi-Select Items** button.

    The Patient Status Lookup dialog box opens.

15. Click to select those patient statuses designating that no treatment is recommended.

16. Click **OK**.

17. Click the third Patient Statuses tab.

18. Click the **Multi-Select Items** button.

    The Patient Status Lookup dialog box opens.

19. Click to select those patient statuses your practice uses when a patient transfers in to your practice.

20. Click the fourth Patient Statuses tab.

21. Click the **Multi-Select Items** button.

    The Patient Status Lookup dialog box opens.

22. Click to select those patient statuses your practice uses when a patient did not enter observation status or become a new patient.

23. Click **OK**.

24. Click the first Ins Billing Centers tab:

25. Click the **Multi-Select Items** button.

    The Insurance Billing Center Lookup dialog box opens.

26. Click to select the billing centers used for all third-party insurance plans (not managed care plans).

27. Click **OK**.

28. Click the second Ins Billing Centers tab:

29. Click the **Multi-Select Items** button.

    The Insurance Billing Center Lookup dialog box opens.

30. Click to select the billing centers for all managed care insurance plans.

31. Click **OK**.

32. Click the Appointment Statuses tab.

33. Click the **Multi-Select Items** button.

    The Appointment Status Lookup dialog box opens.

34. Click to select those appointment statuses your practice uses for dismissed appointments.

35. Click **OK**.

36. Click the Appointment Types tab.

37. Click the **Multi-Select Items** button.

    The Appointment Type Lookup dialog box opens.

38. Click to select those appointment types your practice uses to designate an emergency.

39. Click **OK**.

40. Click the Appointment Statuses tab.

41. Click the **Multi-Select Items** button.

    The Appointment Status Lookup dialog box opens.

42. Click to select those appointment statuses your practice uses to designate patient no-shows.

43. Click **OK**.

44. Click the next Appointment Statuses tab.

45. Click the **Multi-Select Items** button.

    The Appointment Status Lookup dialog box opens.

46. Click to select those appointment statuses your practice uses to designate cancelled appointments.

47. Click **OK**.

48. Click the Print/View tab to specify how you want to print the JCO report.

49. Click the **Finish** button.

The report may take up to five minutes to run, depending upon the size of your database.