

**Dolphin Management  
JCO Survey 2019  
Configuration and User's Guide**

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Patterson Dental Supply, Inc. *dba* Dolphin Imaging and Management Solutions  
9200 Oakdale Avenue, Suite 500  
Chatsworth, CA 91311  
USA

Toll Free: 800.548.7241  
Office: +1.818.435.1368  
Fax: +1.818.435.1369

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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 2019 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 2019 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 - 2019** report.

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

The screenshot shows the 'Print Report' dialog box for the 'JCO Orthodontic Practice Study - 2019' report. The dialog has a title bar with 'Print Report' and standard window controls. Below the title bar is a tabbed interface with tabs for 'Date Range', 'Appointment Types', 'Patient Statuses', 'Patient Statuses', 'Patient Statuses', and 'Patient'. The 'Date Range' tab is active. The main area contains the text 'Select the date range to use in the report (Should use year 2018)'. There are two radio buttons: 'By Date Range' (selected) and 'By Period'. The 'By Date Range' option has two dropdown menus for 'Beginning Date' and 'Ending Date'. On the right side, there is a 'Selection Overview' panel with a tree view showing various categories like 'Date Range', 'Appointment Types', 'Patient Statuses', 'Ins Billing Centers', 'Appointment Statuses', and 'Print/View'. At the bottom, there are buttons for 'Cancel', '< Back', 'Next >', and 'Finish'.

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.