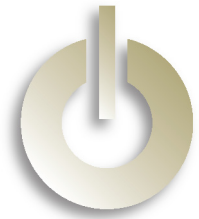


Bentson Clark & Copple Operational Statistics



ORTHO2

As part of the data they collect for the valuation of an orthodontic practice, Bentson Clark & Copple ask for key office operating statistics. The following instructions will help you access this information in Ortho2 ViewPoint.

Financial

Yearly Doctor Hours Worked

The number of doctor hours is found on the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis



Select the desired date range, office location, and doctor. View the report and read the number from the Doctor Hrs column in the Summary section as shown below.

Dr. Joseph Brown											Date: 10/1/2009
PRACTICE STATISTICAL ANALYSIS - January 1, 2008 to December 31, 2008											Time: 1:01:24 PM
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	Work Hrs*
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
11/2008	\$37,405.00	-\$7,481.50	-\$1,641.00	\$32.30	\$28,314.80	\$27,861.00	\$190,952.92	\$10,870.79	48	10	
	32	0	13	51	14	274	40	344	117	415	101
	544	35	379	8	2	21	2	31			
12/2008	\$97,880.00	-\$7,457.01	-\$1,623.00	\$30.66	\$88,830.65	\$82,504.91	\$197,278.66	\$10,712.66	38	10	
	20	0	14	58	15	275	38	358	98	358	74
	522	31	386	8	1	11	2	21			
Summary											
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	Work Hrs*
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
	403	0	173						1362.5	4911.5	1146.5
	6077	367		69	12	176	38	283.0			
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

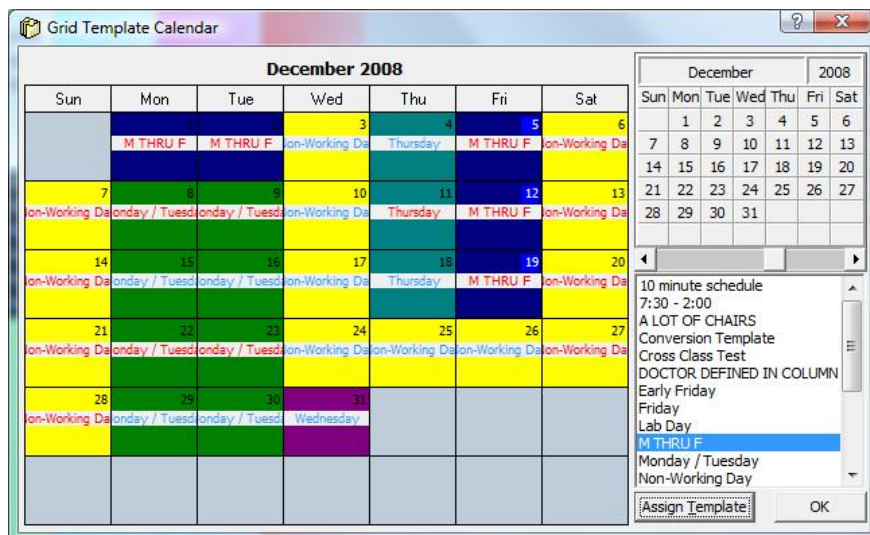
* For details on the setup and use of the Practice Statistical Analysis report please request a copy of "Using the Practice Statistical Analysis Report" from any Ortho2 representative or download a copy from www.ortho2.com > White Papers.

Yearly Doctor Days Worked

The number of doctor days can be counted from the Grid Scheduler Template Calendar.

Grid Scheduler  > **Grid Tools menu**  > **Template Calendar**

You can view your past grids a month at a time and manually count the number of days worked. In our image on the next page, you can see that we have defined a color to identify each different template used. The "non-working day" template is defined in yellow; therefore, you could simply count up all non-yellow days.



Annual Practice Production

Annual practice production appears on the Transaction Summary report.

Main Menu > Practice Reports > Financial > Transaction Summary

Select the desired date range, office location, and doctor. View the report and read lines H, I, and J at the end of the report.

- Line H: Total of charges prior to adjustments.
- Line I: Total of all adjustments (such as treatment fee discounts or write-offs) made to accounts within that date range.
- Line J: Total of all adjusted charges. All adjustments are subtracted from gross charges, giving a true view of the total charges within that date range.

Dr. Joseph Brown **Date: 10/1/2009**
TRANSACTION SUMMARY - Tuesday, January 1, 2008 to Wednesday, December 31, 2008 **Time: 1:20:38 PM**

SUMMARY

(a) Previous Account Balance	131,647.61
(b) Treatment Fees	933,440.00
(c) Treatment Fee Adjustments	-140,219.98
(d) Adjusted Treatment Fees (b+c)	793,220.02
(e) Misc. Charges	57,255.01
(f) Other Adjustments	-20,324.47
(g) Adjusted Misc. Charges (e+f)	36,930.54
(h) Total Charges (b+e)	990,695.01
(i) Total Adjustments (c+f)	-160,544.45
(j) Adjusted Total Charges (h+i)	830,150.56
(k) Total Receipts	764,519.51
Total Reversals *	127.37
(l) Net Account Balance Change (j-k)	65,631.05
(m) Total Account Balance (a+l)	197,278.66

* Note: Detail of reversals is available on Audit report "Reversals and Fixes".

Annual Collections, Net

Annual collections appear on the Transaction Summary report.

Main Menu > Practice Reports > Financial > Transaction Summary

Select the desired date range, office location, and doctor. View the report and read line K and the line below it.

- Line K: Total of all receipts applied to patient accounts within that date range.
- Total Reversals: Total of all reversed receipts within that date range. This would generally imply receipts posted or received in error.

Dr. Joseph Brown		Date: 10/1/2009
TRANSACTION SUMMARY - Tuesday, January 1, 2008 to Wednesday, December 31, 2008		Time: 1:20:38 PM
SUMMARY		
(a) Previous Account Balance		131,647.61
(b) Treatment Fees		933,440.00
(c) Treatment Fee Adjustments		-140,219.98
(d) Adjusted Treatment Fees (b+c)		793,220.02
(e) Misc. Charges		57,255.01
(f) Other Adjustments		-20,324.47
(g) Adjusted Misc. Charges (e+f)		36,930.54
(h) Total Charges (b+e)		990,695.01
(i) Total Adjustments (c+f)		-160,544.45
(j) Adjusted Total Charges (h+i)		830,150.56
(k) Total Receipts		764,519.51
Total Reversals *		127.37
(l) Net Account Balance Change (j-k)		65,631.05
(m) Total Account Balance (a+l)		197,278.66

* Note: Detail of reversals is available on Audit report "Reversals and Fixes".

Contracts Receivable (C/R)

The unbilled contract amount can be found on the Projected Receivables by Month report.

Main Menu > Practice Reports > Financial > Projected Receivables by Month

View the report and read the Projected Treatment Fee Receivable Total at the bottom.

PROJECTED RECEIVABLES BY MONTH

All Records

Dr. Joseph Brown		Date: 10/1/2009	
PROJECTED RECEIVABLES BY MONTH - Thursday, October 1, 2009		Time: 1:29:42 PM	
Projection Month	Projected Amount	Annual Cumulative	
2009	October	\$20,107.00	\$20,107.00
2009	November	\$19,275.00	\$39,382.00
2009	December	\$17,971.00	\$57,353.00
2010	January	\$18,286.00	\$18,286.00
2010	February	\$14,973.00	\$33,259.00
2010	March	\$12,852.00	\$46,111.00
2010	April	\$11,679.00	\$57,790.00
2010	May	\$10,778.00	\$68,568.00
2010	June	\$8,708.00	\$77,276.00
2010	July	\$7,856.00	\$85,132.00
2010	August	\$7,365.00	\$92,497.00
2010	September	\$5,775.00	\$98,272.00
2010	October	\$4,646.00	\$102,918.00
2010	November	\$3,890.00	\$106,808.00
2010	December	\$3,647.00	\$110,455.00
2011	January	\$3,413.00	\$3,413.00
2011	February	\$3,407.00	\$6,820.00
2011	March	\$2,787.00	\$9,607.00
2011	April	\$2,298.00	\$11,905.00
2011	May	\$1,725.00	\$13,630.00
2011	June	\$947.00	\$14,577.00
Projected Treatment Fee Receivable Total			\$182,385.00

Accounts Receivable, Gross and Accounts Receivable > 60 days

Both the gross A/R and the portion of that which is greater than 60 days can be found on the A-R Aging reports.

Main Menu > Practice Reports > Financial > A-R Aging Past Date

Select the desired date. View the report (It may take awhile to generate). Read the Account Balance total for accounts receivable. Then add together the 61-90 amount and the 91+ amount to find the amount greater than 60 days.

Dr. Joseph Brown											Date: 10/1/2009	
ACCOUNTS RECEIVABLE AGING - Thursday, January 1, 2009											Time: 1:10:59 PM	
Patient Name	STS	Res. Party	Home Phone	Work Phone	Amount Due	0 - 30 Days	31 - 60 Days	61-90 Days	91+ Days	## Day	Account Balance	-Last Receipt-Amount Date
(871 records were printed)				Totals:	114.34	-3,749.32	876.46	215.00	4,371.20		197,278.66	

Operational

New Patient Exams

The number of new patient exams is found on the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis

Select the desired date range, office location, and doctor. View the report and read the number from the New Exams column in the Summary section.

Summary											
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	Work Hrs*
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
	403	0	173						1362.5	4911.5	1146.5
	6077	367		69	12	176	38	283.0			
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

Alternately, the number of new patient exams can be found on the Kept Procedures Summary - by Year report. Select the desired date range, office location, and doctor. Then select your new exam procedures from the list. View the report and read the number from the Total Count line.

Case Starts

The number of case starts is found on the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis

Select the desired date range, office location, and doctor. View the report and read the numbers from the Phase I Start, Phase II Start, Full Case Start, and Limited Start columns in the Summary section as shown on the next page. (Note: the New Starts column specifically excludes Phase II Starts.)

* For details on the setup and use of the Practice Statistical Analysis report please request a copy of "Using the Practice Statistical Analysis Report" from any Ortho2 representative or download a copy from www.ortho2.com > White Papers.

Summary											
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	Work Hrs*
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
	403	0	173						1362.5	4911.5	1146.5
	6077	367		69	12	176	38	-283.0			
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

Total Case Completions/Debands

The number of debands is found on the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis

Select the desired date range, office location, and doctor. View the report and read the number from the Debands column in the Summary section.

Summary											
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	Work Hrs*
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
	403	0	173						1362.5	4911.5	1146.5
	6077	367		69	12	176	38	283.0			
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

Alternately, the number of debands is found on the Kept Procedures Summary - by Year report. Select the desired date range, office location, and doctor. Then select your deband procedures from the list. View the report and read the number from the Total Count line.

Active Patients

Both the exact number of active patients on specific dates and the average number of active patients within a date range can be found on the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis

Select the desired date range, office location, and doctor. View the report and read the Phase I, Phase II, Full Case, and Limited columns as shown on the next page.

In the monthly totals section, this field will show the number of active patients on the last day of the month (or last day of the range, in the case of a partial month).

In the Summary section, the Average portion will show the average number of active patients for the range of the report.

* For details on the setup and use of the Practice Statistical Analysis report please request a copy of "Using the Practice Statistical Analysis Report" from any Ortho2 representative or download a copy from www.ortho2.com > White Papers.

Dr. Joseph Brown
 PRACTICE STATISTICAL ANALYSIS - January 1, 2008 to December 31, 2008

Date: 10/1/2009
 Time: 1:01:24 PM

Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	Work Hrs*
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
11/2008	\$37,405.00	-\$7,481.50	-\$1,641.00	\$32.30	\$28,314.80	\$27,861.00	\$190,952.92	\$10,870.79	48	10	
32	0	13	51	14	274	40	344	117	415	101	
544	35	379	8	2	21	2	31				
12/2008	\$97,880.00	-\$7,457.01	-\$1,623.00	\$30.66	\$88,830.65	\$82,504.91	\$197,278.66	\$10,712.66	38	10	
20	0	14	58	15	275	38	358	98	358	74	
522	31	386	8	1	11	2	21				

Summary

Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	Work Hrs*
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
403	0	173							1362.5	4911.5	1146.5
6077	367		69	12	176	38	283.0				
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

Alternately, the number of patients currently in any of these statuses can be found with the Patient Names by Status report.

Additionally, the Status Count Comparison report will show the number of patients in each status on any two dates.

Active Patients Paid in Full (#)

The number of active patients who have paid in full can be found by running the Patient Balance List with a subgroup.

Main Menu > Practice Reports > Financial > Patient Balance List

Under Group Options, select Subgroup. Use a subgroup for patients in any active status and with a balance less than or equal to zero.† View the report and read the total number of records.

PATIENT BALANCE LIST

Active Pats w/ Bal <= \$0

Patient Name	ID	Status	Amount Due	Account Balance
[names removed]	07-364	Active Comprehensive	0.00	0.00
[names removed]	06-199	Active Phase II	0.00	0.00
(313 records were printed)			-3,204.00	-164.00

Dr. Joseph Brown
 PATIENT BALANCE LIST - Thursday, October 1, 2009

Date: 10/1/2009
 Time: 1:51:54 PM

In addition, the number of these patients who paid in full at the start of treatment can be found by running the Transactions by Type report with the same subgroup.

Main Menu > Practice Reports > Financial > Transactions by Type

Select a date range to accommodate all active patients start dates and select your paid in full treatment fee adjustment. Under Group Options, select Subgroup and use the same subgroup as before. View the report and read the total number of records. Because each patient is include twice (due to both the discount and it's offset being included) divide this number in half.

† If you need assistance with this subgrpou, call Ortho2 Software Support at (800) 346-4504.

TRANSACTIONS BY TYPE

Active Pats w/ Bal <= \$0 -- Reports: 51 to 214

Dr. Joseph Brown

Date: 10/1/2009

TRANSACTIONS BY TYPE - Thursday, March 1, 2007 to Thursday, October 1, 2009

Time: 1:58:31 PM

Date	Description	Patient Name	ID	Amount
Paid in full				
03/26/2007	Paid in full	[names removed]	05-234	-235.00
03/26/2007	Paid in full	[names removed]	05-234	235.00
03/28/2007	Paid in full	[names removed]	06-205	-300.00
03/28/2007	Paid in full	[names removed]	06-205	300.00

(224 records were printed) / 2 = 112

Patients on Recall Status and Patients in Retention

Both the number of patients in recall status and the number of patients in retention can be found with the Status Count Comparison report.

Main Menu > Practice Reports > Status > Status Count Comparison

Select the two dates you wish to compare. View the report and read the "# in on" columns for the line with your recall status. If you have more than one recall status, add the appropriate lines together. Then read the "# in on" columns for the line with your retention status. If you have more than one retention status, add the appropriate lines together.

STATUS COUNT COMPARISON

All Patients

Dr. Joseph Brown

Date: 10/1/2009

STATUS COUNT COMPARISON - Thursday, October 1, 2009

Time: 1:37:24 PM

Status	# in on	# in on	Increase	% Increase
	12/31/2007	12/31/2008	-Decrease	- Decrease
Active Comprehensive	169	272	103	61%
Active Comprehensive Surgical	7	3	-4	-57%
Active Limited	28	38	10	36%
Active Phase I	25	58	33	132%
Active Phase II	3	15	12	400%
Consultation	21	18	-3	-14%
Dismissed	46	81	35	76%
In & Out Tx (fwr, retainer)	0	1	1	
Inactive	345	560	215	62%
Inactive Not Seen	200	352	152	76%
New Patient Exam	26	39	13	50%
New Start	14	24	10	71%
Not Yet Scheduled	3	0	-3	-100%
Observation	200	262	62	31%
Records	23	56	33	143%
Retention	58	115	57	98%
Transferred	9	19	10	111%
Will Call Back	37	19	-18	-49%

(18 records were printed)

Alternately, the number of patients currently in these statuses can be found with the Patient Names by Status report.

Average Number of Patients Seen per Day

The average number of doctor days can be calculated from the Kept Procedures Summary - by Year report.

Main Menu > Practice Reports > Appointment > Kept Procedures Summary - by Year

Select the desired date range, office location, and doctor. Then select All procedures from the list. View the report and read the number for the desired year from the Total Count line.

Finally divide this total by the Yearly Doctor Days Worked (from page 1 of these instructions) following this formula:

$$\text{Total Kept Procedures for Year} / \text{Yearly Doctor Days Worked} = \text{Average Number of Patients Seen per Day}$$

Dr. Joseph Brown
 KEPT PROCEDURE SUMMARY - BY YEAR - January 1 to December 31

Date: 10/1/2009
 Time: 1:48:19 PM

Code	Procedure	2008	2007	2006	2005	2004
(57 records were printed)		Total Count: 8455	8890	5408	2739	793

Alternately, patients per day is graphed on the Practice Statistical Analysis report. However, this report defines "day" as eight hours, not as a calendar day.

% Adult Patients in Active Treatment

The percentage of active treatment patients who are adults can be calculated from running the Patient Names by Status report with subgroups.

Main Menu > Practice Reports > Patient > Patient Names by Status

Select your active statuses from the list. View the report and read the totals. Add the totals together.

Select the same statuses. Use a subgroup for patients whose "Age in Years" is greater than or equal to 18.† View the report and read the totals. Add the totals together.

Finally, calculate the percentage following this formula:

$$\text{Total from the Second Report} / \text{Total from the First Report} \times 100 = \% \text{ Adult Patients in Active Treatment}$$

PATIENT NAMES BY STATUS

All Patients -- Status: AC,ACS,AL,AP1,AP2

Dr. Joseph Brown
 PATIENT NAMES BY STATUS - Thursday, October 1, 2009

Date: 10/1/2009
 Time: 1:50:53 PM

Patient Name	Code	Phase
AC		
[names removed]		
(331 records were printed for AC)		←
ACS		
[names removed]		
(3 records were printed for ACS)		←
AL		
[names removed]		
(45 records were printed for AL)		←
AP1		
[names removed]		
(65 records were printed for AP1)		←
AP2		
[names removed]		
(22 records were printed for AP2)		←

Percent Dentist/Patient/Other Referrals

The percentage of new exams referred from each of these sources can be calculated from the Practice Statistical Analysis* report.

Main Menu > Practice Reports > Financial > Practice Statistical Analysis

Select the desired date range, office location, and doctor. View the report and read the New Exams, DDS Referrals, and Pat Referrals columns in the Summary section.

Then calculate the percentages following these formulas:

$$\text{DDS Referrals} / \text{New Exams} \times 100 = \text{Percent Dentist Referrals}$$

$$\text{Pat Referrals} / \text{New Exams} \times 100 = \text{Percent Patient Referrals}$$

$$100 - (\text{Percent Dentist Referrals} + \text{Percent Patient Referrals}) = \text{Percent Other Referrals}$$

* For details on the setup and use of the Practice Statistical Analysis report please request a copy of "Using the Practice Statistical Analysis Report" from any Ortho2 representative or download a copy from www.ortho2.com > White Papers.

† If you need assistance with this subgroup, call Ortho2 Software Support at (800) 346-4504.

Summary											
Month	Gross Charges	Tx Fee Adj	Other Adj	Late Fees	Net Charges	Total Receipts	Total A/R	31+ Past Due	New Exams	Debands	
	DDS Referrals	Pat Referrals	Recall OBS	Phase I	Phase II	Full Case	Limited	Past Completion	Doctor Hrs*	Staff Hrs*	Work Hrs*
	Scheduled Appt	Missed Appt	Active Pats	Phase I Start	Phase II Start	Full Case Start	Limited Start	New Starts			
Total											
12	\$990,543.00	-\$140,219.98	-\$20,324.47	\$152.01	\$830,150.56	\$764,519.51			567	91	
	403	0	173						1362.5	4911.5	1146.5
	6077	367		69	12	176	38	283.0			
Average											
	\$82,545.25	-\$11,685.00	-\$1,693.71	\$12.67	\$69,179.25	\$63,709.96	\$164,817.26	\$13,198.40	47.3	7.6	
	33.6	0.0	14.4	38.7	9.0	231.5	34.8	272.6	113.5	409.3	95.5
	506.4	30.6	313.9	5.8	1.0	14.7	3.2	23.6			

Alternately, the percentage of patients referred from each of these sources can be calculated from the Referral Detail - by Referrer report. If you only want patients entered within a date range, subgroup based on Entry Date. View the report and add up the numbers of patients referred by all dentist referrers, by all patient referrers, and by all other sources. Compare these against the total of all patients on the report (found at the bottom of the last page) to calculate the percentage.

Alternately, if you would like to know the percentage of patients referred by their own dentist, not just any dentist, this can be found in the summary section of the Referral Analysis report.

Average Fees

The average comprehensive treatment fee (adolescent), average comprehensive treatment fee (adult), average phase I fee, and average phase II fee can all be calculated using the Contract Totals report with subgroups.

Main Menu > Practice Reports > Financial > Contract Totals

Select the desired date range (of start dates). Under Group Options, select Subgroup. Use a subgroup for patients who are in your comprehensive treatment phase and whose "Age in Years" is less than 18.† View the report and read the total number of records and the Contract Amt. column.

Select the same date range, and select Subgroup. Use a subgroup for patients who are in your comprehensive treatment phase and whose "Age in Years" is greater than or equal to 18.† View the report and read the total number of records and the Contract Amt. column.

Select the same date range, and select Subgroup. Use a subgroup for patients who are in phase I.† View the report and read the total number of records and the Contract Amt. column.

Select the same date range, and select Subgroup. Use a subgroup for patients who are in phase II.† View the report and read the total number of records and the Contract Amt. column.

For each report, calculate the average fee following this formula:

$$\text{Contract Amt. Total} / \text{Number of Records Printed} = \text{Average Treatment Fee}$$

CONTRACT TOTALS						
<u>Comp Tx Patients under 18 -- Order By: Patient ID & Phase</u>						
Dr. Joseph Brown				Date: 10/1/2009		
CONTRACT TOTALS - Tuesday, January 1, 2008 - Wednesday, December 31, 2008				Time: 1:55:46 PM		
ID	Patient Name	Billing Name	Phase	Start Date	Contract Amt.	Balance
05-115	[names removed]	[names removed]	Comp	03/05/2008	\$4,450.00	\$0.00
(132 records were printed)					\$494,617.00	\$49,030.12

Comp. Treatment Time

Please contact Ortho2 at (800) 346-4504 to discuss a custom query of the database.

† If you need assistance with this subgroup, call Ortho2 Software Support at (800) 346-4504.

Contact

If you have any questions or need assistance with any of these items, please contact the Ortho2 Software Support Team.

If you have any questions regarding the significance of these statistics or any aspect of orthodontic succession, including valuation, transition, placement, and financing, please contact Bentson Clark & Copple.

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