Jarvis Analytics Proprietary and Confidential 2020



# Jarvis Dashboard User Guide



This Dashboard is desktop and mobile friendly and only displays the clinic location(s) specific to you.

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Jarvis Analytics | 12377 Merit Dr, Ste 225, Dallas, TX 75251 | 866-9-JARVIS (527-847) | support@jarvisanalytics.com

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### **GETTING STARTED**

- Visit <u>https://jarvisanalytics.mesasix.com/</u> You will see the screen to the right.
- 2. Enter your username/email and password.
- 3. Click the "*Login*" button and you will be redirected to your dashboard.

#### Note:

- If you don't have an account yet, email <u>support@jarvisanalytics.com</u> or call **866-9-JARVIS** (866-952-7847).
   We will create your account and send you your credentials.
- If you forgot your password, click "Lost your password?" and a new password will be sent to your email.

We recommend the use of Google Chrome as some features may not work properly in other browsers.

#### Don't have Google Chrome yet? Download it here.



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### **CHANGING YOUR PASSWORD**

You can change your password at any time.

- On the left side of the screen, click on "My
   Preferences". If you don't see My Preference, click on the icon.
- Your profile will populate. Here, you can update your account information including you password.
- Change your Password by clicking the "Generate Password" button.
- 4. Press "*Enter*" to save changes

Image: Goals       Image: Goals       Image: Hygiene Recall       Image: Fractions       Image: Goals       Image:	>   >   >   Account Management   >   >   New Password	You can change your profile picture on <u>Gravatar</u> .
<ul> <li>A. Hygiene Recall</li> <li>A. KPIs</li> <li>Morning Huddle</li> <li>Operations</li> <li>A. Patient Portal</li> </ul>	> Account Management   > New Password	You can change your profile picture on <u>Gravatar</u> . Generate Password
<ul> <li>KPIs</li> <li>Morning Huddle</li> <li>Operations</li> <li>Patient Portal</li> </ul>	Account Management       New Password	Generate Password
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<ul><li>Operations</li><li>Patient Portal</li></ul>	>	(Jm
Patient Portal		Cin)
	Sessions	Log Out Everywhere Else
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A Provisioner	> Office Assignment	
lii Settings	Select all office locations.	
Setup	×	
Snapshot	>	
🛱 Tx Miner	>	
⊜ Waterfall	>	
My Preferences	>	

## 3 NAVIGATION

3.1

You can go to your desired module by clicking the module name in the sidebar





You can also click the burger icon located at the top right of the page.



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4 GRAPHS





Hover over graphs to see detailed information.

GRAPHS

4





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To see users online, click the "**Online Users**" located at the bottom of the page.

You will see all online users in the pop up list.

Click to collapse the window.



 $\times$ 

## 6 CONNECTOR STATUS

Click "Search" to see all connectors ⑤ Q Search Connector is online and data is syncing Connector is offline and data is not syncing **Connectors** *If a Connector is offline:* Check network connection 1. Check that connector is running 2. The Connector will disconnect if:  $\mathcal{C}$ PMS upgrade has taken place I.P. address has changed 2. Please contact <a href="mailto:support@jarvisanalytics.com">support@jarvisanalytics.com</a> call 866-9-JARVIS (866-952-7847) Q Search to request help with re-starting or re-configuring the connector.

## 7 DATE FILTER

You are able to filter data displayed in your dashboard by date. Follow these steps to sort your data by date:

- 1. Click on the Calendar Icon 15
- 2. Choose the desired Date Range
- 3. Click on the Custom Range
- The calendar will expand enabling you to choose from and to dates
- 5. Click on "*Apply*" to generate the data
- 6. Otherwise, click the "**Cancel**" button to do nothing



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### **OTHER BASIC FUNCTIONALITIES**

VIEW Offices				Compare	Cet 01 2017-Oct 11 2017
Cancellations	View operations by		Compare the data from		Sort data
Compliance	Cancellations, Claims,	Diff Last Yr.	the previous year.	Last 7 Days	displayed by
Marketing	Compliance, Marketing, Offices, Pavors	% Diff Last Yr.	• Diff Last Year	This Month	date.
✓ Offices Pavors	Performance, Providers,	Diff Vs. Goals	• % Diff Last Yr.	Last Month	
Performance	Services, ,Score Cards, or		• Diff vs. Goals	Custom Range	
Providers	Trends.			FROM TO	
Services Score Cards				Dec 11 2016 Jan 10 2017	
Trends		Download CSV	download the report	Apply Cancel	
Indicates an	increase	Download PDF	in the following		
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Export the d green down	lata into CSV by clicking this load button.	2.5Willoud Fild	1. CSV 2. PDF 3. PNG	your desired re	sult.

All locations you have access to



#### **Dashboard Module List**

#### **DEMO** Dental Dashboard X My Modules My Locations (12) $\bigcirc$ Apple 0 Accounts $\bigcirc$ C Auburn Call Leads Iluetooth Dental Dashboard 合 Oental Floss 定 EOD eMails ⑦ Dental Haven Q EOD Form ⊘ eTeeth Ø EOD Form V2 EOM Form Ó PreshBreath Financials Good Year Good Yea R Form Leads Happy Tooth A Front Office $\bigcirc$ ļļľ Jarvis Goals $\bigcirc$ <sup>20</sup> Hygiene Recall Washington <sup>20</sup> KPIs new Leads Report V2 Morning Huddle 15 **Operations** Demo Fer Bationt Man (i) User Guides and Manuals Available user guides, manuals and Dashboard Manual PDF contact information. Definitions PDF If you have any questions email us at support@jarvisanalytics.com Or call us at 866-9-JARVIS (527-847)

## **10** CALENDAR (Jarvis)

- The calendar view displays your monthly events and reservations.
- Today's events/reservations are also displayed in the table to the right.
- Sort the reservations by location using the "Location" dropdown above.
- Change date by clicking on the < and > buttons in the left side of the calendar.
- Change to Month, Week or Day view by clicking the button at the top right of the calendar.

	DEMO Reservations								<ul> <li>Hello, Charlene</li> </ul>	LEDGER 100.00% RESERVATION 100.01%
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label bit is in the la	2:30p Hintz, Michel	1p Weber, Zackary			10:30a Gaylord, Scottle	11a Hane, Carlotta	1:30p Adams, Amaya	9 Herman, Kip		11:00 am
space         space <t< td=""><td>2:30p Crona, Alta</td><td>1p Crooks, Jade</td><td></td><td></td><td>11a Buckridge, London</td><td>11:30a Nicolas, Marianna</td><td>2p Mante, Ahmad</td><td>10 Brekke, Janiya</td><td></td><td>01:00 pm</td></t<>	2:30p Crona, Alta	1p Crooks, Jade			11a Buckridge, London	11:30a Nicolas, Marianna	2p Mante, Ahmad	10 Brekke, Janiya		01:00 pm
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Space S	9a Reinger, Britney	8a Schmidt, Vella			9a Bernhard, Brant		10a Johnston, Garrick	16 Sauer, Waylon		03:00 pm
1 Marchald, Addental valuence 1 Marchald, Addental valuence	9:40a Baumbach, Rodolfo	8:30a Koch, Joelle			9a Goodwin, Rosella		1p Grimes, Monserrat	17 Orn Jean		0300 pm
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Specific     Specific     Specific     Specific     Specific     Specific	8:30a Spinka, Mae	9a Leffler, Cassandra	9a Aufderhar, Jallyn		9a Reilly, Jayme	8a Christiansen, Angelita	7a Keebler, Herminia			
Barbork, Skapple         Table Ska, Skahn         Stabarbork, Skapple         Table Skapple         Barbork, Skapple<	9a Jenkins, Thomas	10a Gottlieb, Layla	9a Cummerata, Maynard		9a Christiansen, Coleman	8a Murazik, Jordon	8a Mertz, Roselyn			
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Dia Goldme, Mochari         Op totag, Sultatore         Dia Dubuga, Echte         Ip telesce, fishia         Bib Bastriet, Dectiny         Bib Beske, Agun           Dia Goldme, Michari         Dia Conto, Goldme         116 Conto, Goldme         119 Dubuga, Pendon         93 Gentel, Asian         94 Secting, David           Ti a Goldme, Michari         Bip Curcle Allane, Domentica         11a Magene, Booly         119 Dubuga, Pendon         93 Gentel, Asian         94 Secting, Acadme           Ti a Goldme, Michari         Bip Curcle Allane, Domentica         Tala Magene, Booly         119 Dubuga, Pendon         93 Gentel, Asian         94 Secting, Acadme           Ti a Miller, Franken         Bip Control, Rame         Bip Genter, Lorenci         139 Secting, Schone         93 Secting, Schone         93 Secting, Schone           Spiseler, Subme,	10a Gaylord, Dejuan	1p Pfeffer, Tavares	10a Veum, Peggle		10a Flatley, Vivienne	8a Stanton, Shaun	Ba Brakus, Rickie			
Data Allectar Dano     Sp Control     Ta Cooles Coan     Tp Data Allectar     Tp Data Allectar     Sp Control     Sp Control       11a Goldner, Michael     Sp Control Stank, Domenica     11a Goldner, Michael     1p Onti, E Jaalyn     Sp Control Stank, Domenica     Sp Control Stank, Domenica       11a Miller, Rapine     Sp Endopt, Efail     11a Water, Rapine     Sp Stank, Stank, Domenica     Sp Stank, Stank, Domenica     Sp Stank, Stank       1p Stanker, Sabnyna     Ap Gorant, Melle     1130a Kindeun, Iszaker     Sp Stank, Stank, Jank     Sp Stank, Stank, Jank       1p Lubarts, Stanyna     Ap Gorant, Melle     1130a Kindeun, Stanker     Sp Stanker, Janker     Sp Stanker, Janker       1p Lubarts, Stanyna     Ap Gorant, Melle     129 Stanker, Damin     Ja Madernort, Sabe     Sp Stanker, Janker       1p Lubarts, Stanyna     Ap Gorant, Melle     129 Stanker, Damin     Ja Madernort, Sabe     Na Hagense, Liberte	10a Goldner, Michael	2p Haag, Salvatore	10:30a DuBuque, Eloise		<b>1p</b> Heaney, Eulalia	8:30a Bartell, Destiny	9a Brekke, Arjun			
Dia Golder, Michael     Operations, Comencia     Dia Agenee, Bioly     Ip Operations, Comencia     Dia Agenee, Bioly       Dia Miller, Meante     Operations, Comencia     Dia Molex, Stander     Dia Miller, Kealyn     Operations, Stander       Dia Miller, Meante     Operations, Comencia     Dia Molex, Stander     Dia Miller, Kealyn     Operations, Stander       Dia Miller, Meante     Dia Molex, Stander     Dia Molex, Stander     Dia Miller, Kealyn     Operations, Stander       Dia Miller, Meante     Dia Molex, Stander     Dia Molex, Stander     Dia Miller, Kealyn     Operations, Stander       Dia Miller, Kanner     Dia Miller, Meanter     Dia Molex, Stander     Dia Miller, Kealyn     Dia Miller, Kealyn       Dia Miller, Kanner     Dia Miller, Kanner     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn       Dia Miller, Kanner     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn       Dia Miller, Kanner     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn       Dia Miller, Kanner     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn     Dia Miller, Kealyn	10a Ruecker, Daron	3p Cremin, Althea	11a Crooks, Oran		1p DuBuque, Pedro	9a Gottlieb, Jessy	9a Osinski, Carolyne			
Display     Operating     Operating     Operating     Operating       Display     Approximation     Approximation     Display     Display       Display     Approximation     Approximation     Display       Display     Approximation     Display     Display       Display     Approximation     Display     Display       Display     Display     Display     Display       Display     Display     Display     Display       Display     Display     Display     Display       Display     Display     Display     Display	11a Goldner, Michael	3p Cruickshank, Domenica	11a Hagenes, Brody		1p Ortiz, Evalyn	9a Veum, Cloyd	9a Blick, Judah			
Op Subscription     Op Subscription     Op Subscription     Op Subscription       (p) Subscription     129 Notes, Fund     2p Oppsice, Use Fund     129 Notes, Fund       (p) Loboritz, Grein     2p Oppsice, Use Fund     129 Notes, Fund     129 Notes, Fund       (p) Loboritz, Grein     2p Oppsice, Use Fund     129 Notes, Fund     129 Notes, Fund       (p) Loboritz, Grein     2p Oppsice, Use Fund     129 Notes, Fund     129 Notes, Fund       (p) Loboritz, Grein     2p Oppsice, Use Fund     129 Notes, Fund     129 Notes, Fund	1 1a Miller, Pearline	sp Reinger, Ella	TTa Waters, Bruce		1:30p Schmeler, Loyce	9:30a Gerhold, Kacey	9:30a Blick, Judah			
processing and a proces	Tp stokes, sabryna	Ap Grant, Melle	11:30a Nikolaus, Azavier		2p Bogisich, Domenick	11:30a Lemer, Cortez	10a Hagenes, Lisette			
	+8 more		12p Pouros, tumen		+2 more	+14 more	+11 more			

The calendar displays your reservations for the selected week. Click on each event plotted to view more information.

## 10 CALENDAR (Month)

- The calendar view displays your monthly events and reservations.
- Sort the reservations by location using the "Location" dropdown above.
- Change date by clicking on the < and > buttons in the left side of the calendar.
- Change to Month, Week or Day view by clicking the button at the top right of the calendar.

Reservations									Hello, Charlene LEDGER     RESERVATION	100 N 100
vations									Last data sync: 2020-03-	J-11 09:56
N View Type										
✓ ES Calendar - Month ✓										
>			March 2020 0.	3:08 pm						
Sunday	Monday	Tuesday	Wednesday		Thursday		Friday		Saturday	
1	21 Appts	2 6 Appts	3 O Appts	4	27 Appts	5	31 Appts	6	19 Appts	
Closed	New Patients:         4           Sched:         \$5,865,93           Goal:         \$0"ending)           %Goal:         %0"ending)           Pool:         \$5,32602           %Phod:         %0"ending)	New Patients: 0 Sched: 50 Goal: 5 (Pending) 9/Goal: % (Pending) Podd: 50 9/Podd: 90 (Pending)	New Patients: 0 Sched: \$0 Goal: \$(Pending) %Goal: %(Pending) Prod: \$0 %Prod: %(Pending)		New Patients         3           Sched.         \$8,385.04           Goal.         \$1,9ending)           %Goal.         %1/Pending)           Prod.         \$8,385.04           %Frod.         %1/Pending)		New Patients:         0           Sched:         \$5,836.9           Goal:         \$1 (Pending)           %Goat:         % (Pending)           Prod:         \$5,549.6           %Prod:         % (Pending)		New Patients:         6           Sched:         \$3,929.14           Goal:         \$10ending)           %Goal:         \$10ending)           Prod:         \$3,329.14           %Prod:         \$6,1920.11	
8	29 Appts	9 6 Appts	10 0 Appts	11	23 Appts	12	6 Appts	13	12 Appts	
Closed	New Patents:         1           Sched:         \$10,597,26           Goal:         \$(Pending)           %Goal:         %(Pending)           Poid:         \$10,668,75           %Pend:         %(Pending)	New Patients: 0 Sched: 50 Goal: 5 (Pinding) %Goal: % (Pinding) Pind: 50 %Pind: % (Pinding)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % Pending) Prod: \$0 %Prod: % (Pending)		New Patients         2           Sched.         \$3,152,76           Goal.         \$3,9endingi           %Goal.         %Pendingi           Prod.         \$2,985,76           %Pnd.         %Pendingi		New Patients: 0 Sched: 50 Goal: 5 (Pending) %Goat: % (Pending) Prod: 50 %(Prod: % (Pending)		New Patients:         3           Sched:         \$491.5           Goal:         \$1000000000000000000000000000000000000	
15 Closed	10 Appts New Patients: 1 Sched: 52,307 Goal: 4) (Perang) WGaat: 9, (Perang) Pod: 52,288 %Peod: % (Pending)	16         17 Appts           New Patents:         3           Sched:         59,261           Coat:         59rendrng)           %Coat:         %Pendrng)           Pood:         %Pendrng)           %Pood:         %Pendrng)	IP         O Appts           New Patients:         O           Sched:         SO           Goal:         S Pending)           WGoal:         % Pending)           Pind:         % Pending)	18	18 Appts New Patients 0 Sched \$8,517.82 Goal \$ Pending) #Goal % Pending) #Prod \$8,656.08 %Prod \$% Pending)	19	35 Appts New Patients: 2 Sched: \$5,065,25 Goal: \$ Pending) %Goal: % Pending) Prod: \$4,995,25 %Prod: % Pending)	20	32 Appts 1 Sched: \$9,734.52 Goal: \$1Pending] %Goal: \$1Pending] Prod: \$9,914.15 %iProd: \$10Pending]	
22 Closed	27 Appts New Patents: 2 Sched: \$10,337 Gcat: \$9 (Perding) WGcat: %0 (Perding) Pod: \$10,218 %Pnod: %0 (Perding)	23 20 Appts New Patents: 4 Sched. \$10,664 Goal: 5/Perding) %Gaal: %/Perding) Ped. \$10,024 %Pod. %/Perding)	24 0 Appts New Patients: 0 Goal: 5 Pending) WGoal: 4 Pending) Prod. 50 WPtod: 4 Pending)	25	17 Appts New Patients: 3 Sched: \$2,56066 Goal: \$2,6606 Goal: \$2,6066 Goal: \$2,58066 Wending) Prod: \$2,333.44 %Prod: \$6 Pending)	26	19 Appts New Patients: 2 Sched: \$3,6662 Goal: \$ Pending) Widoal: % (Pending) Prod: \$3,6662 %Prod: % (Pending)	27	20 Appts New Patients: 0 Scheid: \$3,019,21 Goal: \$Pending) WGoal: % (Pending) Prod: \$2010,03 %Prod: % (Pending)	
29 Closed	15 Appts New Patients: 0 Sched: \$3,459	30 9 Appts New Patients: 0 Sched: \$396	31 0 Appts New Patients: 0 Sched: 50	1	0 Appts New Patients: 0 Sched: 50	2	0 Appts New Patients: 0 Sched: 50	3	Coverd	
Choice	Goat: S (renaing) %Goat: % (Pending) Prod: \$0 %Prod: % (Pending)	Goat: 3 (rending) %Goat: % (Pending) Prod: \$0 %Prod: % (Pending)	uoa: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)		uoai: s prending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)		Goat S (Pending) %Goat % (Pending) Prod: \$0 %Prod: % (Pending)		Cuico	
	Monthly Totals for - March 2	020				Selected	Range Totals			
Scheduled Amount: \$130 Month Goal: Pend	.823.4 ling	New Patients: 46 Reservations: 521			Scheduled Amount: \$ Selected Goal: Pending			New Patier Reservatio	nts: select one ons: select one	

## 10 CALENDAR (Month)

At the bottom of Month view, you will see Monthly totals and Totals for a selected date range. The view displays:

- Scheduled \$ Amount
- Schedule or Monthly Goal Amount
- % of Goal Pending
- New Patient Count
- Reservation Count
- Production \$ Amount

DEMO Reservations						Hello, Charlene     LEDGER     RESERVATION
Reservations						Last data sync: 2020-03-11 09
LOCATION View Type						
Annia y ES Calendy - I	tooth v					
Appre Co Calendar - 1	Ghan					
< >			March 2020 03:08 pm			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 21 Appts	2 6 Appts	0 Appts	27 Appts	5 31 Appts	6 19 Appts
Closed	New Patients: 4 Sched: 55,865.93 (Coal: 5 (Prienting) %Coal: % (Prienting) Podo: 553,816/2 %Prod: % (Prienting)	New Patients:         0           Scheid:         50           Goal:         5 (Pending)           WicGal:         % (Pending)           Pend:         50           %Pond:         % (Pending)	New Patients: 0 Scheid: 50 Goal: 50 (Perding) %Goal: 1% (Perding) Prod: 50 %Phod: % (Pending)	New Patients:         3           Sched:         \$8,385.44           Goal:         \$ [Perding]           %Goal:         \$ [Perding]           %Goal:         \$ [Perding]           Phod:         \$8385.04           %Phod:         % [Perding]	New Patients: 0 Sched: \$5,836.9 Goala: \$ (Perding) %Goal: % (Perding) Prod: \$5,549.6 %(Prod: % (Perding)	New Patients:         6           Sched.         \$3,929.14           Goal.         \$10erdingi           %Goal.         \$10erdingi           Prod.         \$3,929.14           Whode         \$13,929.14           %iProd.         \$13,929.14
	8 29 Appts	9 6 Appts 14	0 0 Appts 11	23 Appts	2 6 Appts	13 12 Appts
Closed	New Patients:         1           Sched:         5 (Pending)           %Goal:         5 (Pending)           %Goal:         6 (Pending)           Podol         \$10:66:475           %Pod:         % (Pending)	New Patents: 0 Goal: 50Preding) %Goal: %(Preding) Predic 0 %Preding)	New Patients: 0 Sched: 50 Goal: § Pending) %Goal: % Pending) Prod: 50 %Phod: % Pending)	New Patients:         2           Scheit         \$3,152.76           Goal:         \$ Pending)           WGail:         W Pending)           Prod         \$2,883.76           %Hnod:         % Pending)	New Patients: 0 Goale: 5 Perding) %Gale: % Pending) Prod: 50 %Prod: % Pending)	New Patients 3 Sched: \$401.5 Goal: 5 Prending %Goal: % Prending Prod: \$521 %Frod: % Pending
	15 10 Appts	16 17 Appts 1	0 Appts 18	18 Appts 1	9 35 Appts	20 32 Appts
Closed	New Patients: 1 Sched: 52,007 Goal: 59 (Hending) %Goal: 90 (Hending) Podd: 51,288 %Prod: 90 (Hending)	New Patients:         3           Sched:         9.92/61           Goal:         9.0401ng)           %Gaal:         9.0401ng)           Peod.         59.332           %Pod:         9.0404ng)	New Patients: 0 Sched: 50 Goal: 5 (Perding) %Goal: % (Perding) Prod: 50 %Prd: % (Perding)	New Patients         0           Sched         38.11782           Goat         5 Perdingi           %Goat         % Perdingi           Prod.         \$8,45688           %Prd.         % Perdingi	New Patients: 2 Sched. 55,065,25 Goale: 5 Pierding) %Gale. % Pierding) Prod. 54,999,25 %Prod. % (Pierding)	New Patients 1 Sched: 59,73452 Goala 5 Perding %Goal: % Perding Prod. % Perding %Prod. % [Perding]
	22 27 Appts	23 20 Appts 2	0 Appts 25	17 Appts	19 Appts	27 20 Appts
Closed	New Patents: 2 Sched: 510337 Goalt 57 (Hending) %Goalt % (Hending) Phod: \$10,788 %Phod: % (Prending)	New Patents:         4           Schod:         \$10,664           Goal:         \$0,904,000           %Gail:         \$0,904,000           Pool:         \$0,004,000           %Pool:         \$0,004,000	New Patients: 0 Sched: 50 Gotad: 5 (Pending) Hoda: % (Pending) Roda: 40 (Pending)	New Patients         3           Sched         52,563.66           Goals         5 (Pending)           %Goal         % (Pending)           Prod         52,533.64           %Prod         % (Pending)	New Patients 2 Sched: \$3,666.2 Goalt: \$ Peerding) %Galt: % Peerding) Prod: \$3,666.2 %Prod: % Pending)	New Patients:         0           Sched:         \$3,01921           Goale         \$3,00021           Widout         % Pending)           Prod:         \$201,03           Whod:         % Pending)
	29 15 Appts	30 9 Appts 3	0 Appts 1	0 Appts	2 0 Appts	3
Closed	New Patents: 0 Sched: 31,459 (Gcat: 5/Rending) %Gcat: %/Rending) Picda: 50 %Picd: %/Rending)	New Patents: 0 Sched: 5396 Goat: 59redng) %Goat: % (Perding) Pod: 50 %Pod: 50	New Patients: 0 Sched: 50 Goal: 5 (Perding) %Goal: 4% (Perding) Prod: 50 %Rhod: 4% (Perding)	New Pattents: 0 Sched: 50 Goat: 5 Pending) Wood: 4 Pending) Prod: 50 %Bhod: 46 Pending)	New Patients: 0 Sched: 50 Goal: \$ Pending %Goal: % Pending Prod: 50 %Prod: % Pending	Cosed
	Monthly Totals for - March 2020			Se	lected Range Totals	
ount: \$130,823.4 Goal: Pending		New Patients: 46 Reservations: 521	Scheduled Amou Selected Ga	nt \$ al: Pending		New Patients: select one Reservations: select one
Coal Danding		*Production: \$120,585	20 % of Go	al Pending		*Production: \$

### 10 CALENDAR (Day)

DEMO Res	ervations					(	Hello, Charlene LEDGER 100.00%     RESERVATION 100.01%
Reservations	1						Last data sync: 2020-03-11 09:56 AM
LOCATION Apple	View Type       V     ES Calendar - Day     V						
< >		Sched	ule for Friday, March 27, 2020 04:03 pm		[\$3,666.2 / \$3,666.2]	Reservations as of: 2020-03-27	
2011	PRODUCTION/TA	NON PRODUCTION	NP/SRP	RECALL/PM	Prod/TA/Prov1	# TITLE	START
40						1 Gulgawski lairo	08:00 am
50							
7_00						2 natingacy	08:00 am
10						3 3 11	08:00 am
- 20				8		4 Sawayn, Carol	09:00 am
40						5 Lowe, Teagan	09:00 am
50						6 Herman, Kip	09:30 am
8 00		X50.00 Hartmann - Tracy		X\$132.00 Gulgowski - Jairo	X\$187.00 Doyle - Shany	7 Bice Gordon	10:00 am
10		183/500-137-3 183/726.581.5		X364-670-2	X930-677-6		10.00
20		Aspematur aliquam qui veniam et autem molestias expedita rem		Facilis quam ipsam modi rem illum sapiente error est esse et eos. Ut	Nobis ut hic ipsum magni molestiae voluptatem minima vero natus	8 Herman, Kip	TO:00 am
40		empore velit dui nemo sunt beatae. Quibusdam id optio nihil culpa		aliquid enim recusandae eius repudiandae voluptatem enim ipsa dolor et explicabo. Illum quae quia officia qui neque similique id nisi ex	earum vero. Segui Ipsam aut similigue soluta Ipsum repetiendus gula eum odio doloribus omnis. Asperiores eos segui repudiandae	9 Herman, Kip	11:00 am
50		facere vitae quia et alias est quia. Libero ab ornnis aut quisquam		quisquam nisi. Molestiae et et iste in sed nostrum qui voluptate modi	quos eligendi praesentium ad accusantium reiciendis quam dolores.	10 Brekke, Janiya	01:00 pm
9_00	X\$2108.00 Sawayn - Carol		X\$19.00 Lowe - Teagan	2×\$222.18 Herman - Klp	vero excepturi nam. Doloribus nostrum quaerat voluptatem deserunt	11 Sipes, Mara	01:30 pm
10	X767.777.4 X1-494-877		1 X1-D19-959	X120.297.7	et sunt et vel culpa qui consequatur. Animi et autem voluptas dicta	12 Hagenes Brody	02:00 pm
20	Qui quisquam laudantium quia aliquam animi laboriosam cum		Numquam id est excepturi voluptates modi praesentium ipsa	Amet voluptatum aut voluptatum quam alias explicabo est sed		12 Harle Darten	0200 pm
40 min	consequatur aspernatur voluptatem parlatur. Mollitia et elus et Ima facere dolores tempore sint ut excenturi parlatur. Aliouam		dolorem repudiandae quibusdam est. Est unde asperiores quibusdam rerum odio ut rerum qui aperiam adipisci error.	dolor dolores perspiciatis. Deserunt hic consequentur natus rem receilendus ea losam laudantium ab aut molestiae. Occaecati uliam		15 Harris, Dayton	62.00 pm
50	udiandae qui consequatur facere quia aut qui necessitatibus hic		Necessitatibus quis consequatur est fugiat eos ut sit id repellat et	recusandae recusandae sunt sunt perferendis et dolorum dolorem quia	8	14 Glover, Rebekah	02:30 pm
10 00 gut	n aut, expedita expedita et exceptun et itaque quos quia rerum i vero dolore. Mollitla recusandae odio laudantium consectetur et	XS0.00 Rice - Gordon		eos voluptatem lure. Et est cum molestias suscipit earum dolorem	X\$0.00 Herman - Kip	15 Glover, Rebekah	02:30 pm
10 par	atur qui ut qui corporis segui. Quam aut atque fugit est ullam	X1-612-974 X(486)452-		architecto aut parlatur voluptatem repellat. Autem facere qui officia sed officiis pop sed fugiat consectatur deleniti ea Harum pop distinctio	X120.297.7	16 Sauer, Waylon	03:00 pm
20 dol	orem explicabo repellendus sit recusandae asperiores eveniet.	Est officia tempora omnis nobis omnis sunt nam repellat ipsum		dalarom Id Ishanim non concountinualit tonatin placest ut Cint et	Facilis quidem aliquam laborum quia est porro beatae est omnis	17 Orn, Jean	03:00 pm
40 exe 50 am	ore rerum consequatur commodi maxime reprehenderit rcitationem sed magni aliquid vel ea. Doloribus illum perspiciatis si et et voluptatem dolorem quia iure omnis quis. Voluptas	excepturi laboriosam. Cumque beatae vel accusantium nam quia <sup>1</sup> quo est voluptas necessitatibus non vel, id quo vitae veit repellat ad repudiandae et ut et reprehenderit eum. Est accusantium sed			<ul> <li>voluptas guis. Quidem distinctio rerum beatae lpsum harum quia dolor dolore repudiandae culpa porro. Eligendi quisquiam illum nisi et blandittis et consequatur ea magni dolor et. Ut ea quasi lusto quae</li> </ul>	18 Quigley, Broderick	04:30 pm
11 00 m. t	sequatur vitae voluptate corrupti odit excepturi sunt omnis qui eo: exercitationem porro conseguuntur quidem praesentium adipisci				X\$201.98 Herman - Kip		
10 <b>est</b>	debitis est explicabo et officiis. Ea quae qui velit fugiat explicabo				X120.297.7		
20 20	um suscipit voluptas rerum nam ex recusandae. Saepe est aut				Tosa lilo non oraesentium aperiam labore est voluptas dolorem		
30 gua	m consequatur quaerat dolor non neque non magnam eos. lure				dolorum perferendis minima. Sint Ipsum aut quod autem at eos		
40					recusandae voluptatem nobis architecto qui. Ut inventore nic nulla facere et voluptatem quis quaerat iste vel porro. Qui accusantium elus		
12 PM	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH		
10	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH		
20	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH		
30	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH		

The calendar displays all reservations within the day. Clicking on a name will provide a modal with the patient and provider information.

## 10 CALENDAR (Week)



The calendar displays your reservations for the selected week. Click on each event plotted to view more information.



The Calendar view provides different views for single Day, Week, and Month

Res	ervations	1				
LOCATI	ON		Vie	w Type		
Apple ~			1	✓ Jarvis ES Calendar - Day		
<	>	today	1	ES Calen ES Calen	dar - Week dar - Month	

By clicking on an entry in the DAY and WEEK view, the "*Reservation Details*" modal will populate. You can see patient and provider information.

RESERVATION DE	TAILS	5			×	
INFO PROVIDERS						
RSVN. INFORMATION						
Reservation Date			March 24,2	020 09:00:00 AM		
Operatory Title			HYGSP			
Provider Name			Parekh, Sej	al		
Home Phone						
Reservation Reason			Periodonta	l Maintenance		
Note			LM to r/s -	SS		
	RES	ERVATION	DETAILS			X
	INFO	PROVIDERS	5			
	#	NAME	ID	START	END	
	1	Parekh, Sejal	174	2020-03-24T09:00:00	2020-03-24T10:00:00	)

## 11 DASHBOARD

The Main Module summarizes data for all of your locations. The reports included in this module are:

- Total Production
- Total Collection
- Total New Guests Seen
- Financials per Location
- Payor Mix
- Average Production per Guest
- Utilization of Data



The data displayed doesn't include ORTHO data. If you want to include ORTO, just toggle the **ORT Disabled** switch.

Total Production	Total Adjustments	Total Collection
The total production of all locations you have access to.	The total adjustments of all locations you have access to.	The total collection of all locations you have access to.



As you see in the titles, the figures are compared from last year's data with a row indicator showing if it went up or down.

11 DASHBOARD





The **Financials per Location** bar graph above displays the adjustment, collection, and production for each location.



The **Payor Mix Doughnut Chart** above, displays the Cash PPO and Medicaid data. 11 DASHBOARD

Avg Prod/Gst.
---------------

#	LOCATION	PROD		
1	Humpries	•	\$212.11	
2	Nashville Family Dentistry		\$377.78	
3	Shabo	•	\$290.66	
4	Weissman	•	\$168.96	
5	Westen	•	\$207.34	

The **Avg Prod/Gst.** table above displays the average production per guest per location.

Prov	vider: Search Providers	Q	(÷
#	PROVIDER	PROD	Info
1	Aiken, Robert	\$45.00	1
2	BATES, M-JESSICA	\$12,155.26	Am
3	Bhatti, Lori	\$11,817.67	<u>ک</u>
4	CARROLL, THOMAS R.	\$15,562.00	1
5	Castro-Oldham, Antonia	\$5,328.20	1
6	Chakote, Karunesh	\$13,743.00	1
7	DeShazo, Darla Grace	-\$10.00	1
8	EMPLOYEE, PLL IN	\$748.00	1
9	Etheridge, Ronda	\$14,290.00	1
			-

The **Providers** table above lists all your provider with their average production with in the date range you selected.



When you click in the info icon, this window will appear with a more detailed report regarding the provider you selected.



You can hover over the graphs data for more specific information.





## **Utilization data** displays the top 20 providers and their production per

location.



You can hover over the graphs data for more specific information.

- Total Production
- Total Adjustments
- Total Payments / Collections
- Guest Visits
- New Guest Visits
- Guest Scheduled
- New Guest Scheduled
- Average Production per guest





Data displayed is based on the following:

- Single Office
- All Offices (Toggle All)
- Report Type
- Compare Data (vs | Last Yr, Goal, Company Avg.)
- Data Range

If you would like to see your **Financial Report** per location, toggle the "**ALL**" switch. Here, you can see the list of locations with their Ortho production, collection, adjustments, guests seen, new guests seen, guests scheduled, new guests scheduled and average production per guest.

LOC	CATION ALL REPORT Summary Aug 01 2019-Aug 28 2019												
то	P 2096 MID TIER BOT 2096						🕑 Sear	ch	Q				
#	LOCATION	PROD	COLL	ADJU	GST. SEEN	NGST. SEEN	GST. SCHED	NGST. SCHED	AVG PROD/GST				
1	Humpriss .	\$170,534	\$161,526	-\$953	804	75	1,140	37	\$212				
2	Nan-Ile Family Dentstry	\$192,667	\$127,724	-\$60,510	510	31	653	8	\$378				
3	Shato .	\$74,699	\$70,911	-\$6,232	257	18	307	3	\$291				
4	Tietaman .	\$80,592	\$81,853	-\$1,678	477	26	543	3	\$169				
5	Viesten	\$212,802	\$194,950	-\$49,253	1,020	37	961	3	\$209				
	TOTAL:	\$731,294	\$636,964	-\$118,626	3,068	187	3,604	54	\$1,258				



#### **Utilization data**

Shows the utilization data per provider and their location(s).

#### **Adjustment Percent**

Shows the top 5 adjustment types by percentage.

#### **Top Service**

Shows the top 10 services by percentage.

The Daily Financials line graph shows the daily financials data:

- adjustments
- collection
- production.





The guest seen graph shows new and returning guests for the specified date range.



Show daily, weekly and monthly data

## 13 HYGIENE RECALL

The **Hygiene Recall** module helps you track patients who missed their Hygiene appointment and / or patients that have been recalled.

48. <b>F</b>	lygiene Recall						ADV	
BR.A	ND REGION LOCATION	~					Tie Aug	01 2019-Aug 28 2019
							년 Search	٩
HYC	JENE RECALL							
=	PROVIDER	OFFICE	ID	PATIENTS MISSED	PATIENTS RECALLED	PATIENTS RECALLED S	PATIENT RECALL RATE %	
1	Humphries, Carl	Humpriss	1	<u>37</u>	377	\$50,457.20	91%	2 B
2	Grace, Sonya R	Humpriss	2	8	5	\$394.00	38%	din
3	Teylor, Alyshe	Humpriss	AS	<u>86</u>	26	\$1,857.60	2396	<u>\"</u>
4	EVPLOYEE, PLL N	Pumpriss	FI	<u>8</u>	1	\$75.00	1196	<u>2</u> , 2
5	Vance, Nicole	Humpries	NAV	<u>43</u>	113	\$9,941.25	72%	<u>8</u> 2
6	Kilett, Susan	Humpries	SK	118	21	\$1,337.10	1596	<u>2</u> • 2
7	LATHAM, STACY	Humpries	SL	<u>18</u>	۵	\$0.00	096	2
8	Norbut, Sheri	Humpries	SN	1	1	\$88.00	50%	2 2
						Average	38%	

In the right corner of the page, you can see two icons, red and green. **Red** corresponds to the **missed patients**. The **green** icon to the **recalled patients**. Each icon has its own drill down.

See the list of your providers with the office, provider id, number of patients missed, number of patients recalled, dollar recalled, and the provider's hygiene recall rate.

## **13** HYGIENE RECALL (Patients Recalled)

In the **Patients Recall** drilldown, you can see a list of patients with the Patient ID, Primary Remaining Benefits, Secondary Remaining Benefits, Age, Hygiene Production, Patient Recalled \$, Last Hygiene Visit, Next Visit, and Status.

ADVANCED FIL											
BRAND       REGION       LOCATION         AII       AII       AII       Aug 01 2019-Aug 28 2019											
PATIENT RECALLED 2019-08-01 to 2019-08-28 Back to Summary Se											
#	PATIENT NAME	ID	PRI. REM. BEN.	SEC. REM. BEN.	AGE	HYGIENE PRODUCTION	PATIENTS RECALLED \$	LAST HYGIENE VISIT	NEXT VISIT	<u>STATUS</u>	
1	Carter, Robert	1046	\$0.00	\$0.00	86	\$43.00	\$83.00	2019-08-07	2020-02-24	Active	
2	Haines, Gavin	12779	\$868.00	\$0.00	12	\$73.00	\$77.00	2019-08-08	2020-02-10	Active	
3	Ponce, Yarely	14339	\$9,114.00	\$0.00	9	\$61.00	\$49.00	2019-08-07	2019-08-08	Active	
4	Howell, Josh	1516	\$0.00	\$0.00	37	\$68.00	\$95.00	2019-08-14	2020-03-03	Active	
5	Hornsby, Pamela	517	\$1,145.00	\$0.00	63	\$54.00	\$90.00	2019-08-15	2020-02-19	Active	



See the list of your providers with the office, provider id, number of patients missed, number of patients recalled, dollar recalled, and the provider's hygiene recall rate.

## **13** HYGIENE RECALL (Patients Missed)

In the **Patients Missed** drilldown, you can see the list of patients with the Patient ID, Primary Remaining Benefits, Secondary Remaining Benefits, Age, Hygiene Production, Last Hygiene Visit, and Status.

🕮 Hygiene Recall						,	ADVANCED FILTER	
BRAND REGION LO	CATION					16	Aug 01 2019-Aug	28 2019
PATIENT MISSED	2019-08-01 to 2019-08-28			Ш Ва	ack to Sur	mmary Search		Q
	PATIENT NAME	ID	PRI. REM. BEN.	SEC. REM. BEN.	AGE	HYGIENE PRODUCTION	LAST HYGIENE VISIT	<u>STATUS</u>
Lackey, Prankie		10377	\$684.00	\$0.00	48	\$54.00	2019-08-22	Active
Ponce, Enrique		10782	\$7,499.00	\$0.00	18	\$74.00	2019-08-26	Active
Malone, Sonya		1396	\$263.80	\$0.00	45	\$12.00	2019-08-27	Active
Ponce, Yarely		14339	\$9,114.00	\$0.00	9	\$49.00	2019-08-08	Active
Gomes, Maikool		14785	\$727.20	\$0.00	39	\$65.00	2019-08-22	Active
Alidredge, Alek		14806	\$1,282.00	\$0.00	7	\$169.00	2019-08-01	Active

See the list of your providers with the office, provider id, number of patients missed, number of patients recalled, dollar recalled, and the provider's hygiene recall rate.

## 13 HYGIENE RECALL (Patients Missed Reminders)

In the "**Patients Missed**" drilldown, you can select patients and add a reminder for your staff so they can follow up with the patient.

Æ I	ADVANCED FILTER								ADD REMINDER (3)
BRA	ND REGION LOCATION						Aug 01 2019-Aug 2	28 2019	Reminder Date:
PA	TIENT MISSED 2019-08-01 to 2019-08-28		CREATE REMIND	ERS (2) 🕒 🖪	ick to Sui	mmary Search		Q	Aug 23 2019 Assianed To:
	PATIENT NAME	ID	PRI. RELIUN.	SEC. REM. BEN.	AGE	HYGIENE PRODUCTION	LAST HYGIENE VISIT	<u>STATUS</u>	Front Desk 🗸
	Ladiej, Parkie	10377	\$684.00	\$0.00	48	\$54.00	2019-08-22	Active	
	Ponos, Bringue	10782	\$7,499.00	\$0.00	18	\$74.00	2019-08-26	Active	Rodzainna Hamisain Steven
	Malone, Sonya	1396	\$263.80	\$0.00	45	\$12.00	2019-08-27	Active	
	Ponce, Varely	14339	\$9,114.00	\$0.00	9	\$49.00	2019-08-08	Active	Please select a personnel.
	Gomes, Maikool	14785	\$727.20	\$0.00	39	\$65.00	2019-08-22	Active	
	Aldredge, Alek	14806	\$1,282.00	\$0.00	7	\$169.00	2019-08-01	Active	
	Emth, annfar	15884	\$1,349.00	\$0.00	32	\$97.00	2019-08-01	Active	
	Gaurtt, Phylis	17005	\$0.00	\$0.00	66	\$52.00	2019-08-15	Active	
	Cash, Ittiliam	70	\$1,102.00	\$0.00	62	\$54.00	2019-08-19	Active	
						A stinets 1A/			



## 14 KPI (Main View)

		<pi's< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th>① Hello, Stever</th><th>Maroulis LEDGER 100.00% RESERVATION 100.00%</th></pi's<>							① Hello, Stever	Maroulis LEDGER 100.00% RESERVATION 100.00%		
③ KPI's												
BRAND All VIEW & Main	2	REGION Location							[2	Aug 01 2019-Aug 31 2019		
Hygiene				Doctor				Office				
00		Breakdown Perio to Pro	0.05 <sub>phy ©</sub>	1	Breakdown	7 • • • • Same	.53% • Day ②	Â	Breakdown	84.3% Patient Retention ⑦		
00		Breakdown \$2,4 Avg Production per	78.0 Day @	2	Breakdown Case Act	30 ceptance – Rolling 90	.11% days ③	Î	Breakdown Avg. # of Tx pla	0.16 ns presented New Patients ⑦		
00		Breakdown # of Flouride app. per	23 day @	3	Breakdown New Guests	\$1,C Receiving Treatment F	)46.9 Plans @	Â	Breakdown	80.3% Close Percent per day ⑦		
00		Breakdown	1.3	4	Breakdown	\$7	799.6	盦	Breakdown	70.0%		
	Avç	), # of Tx plans presented New Patie	nts - Brea	kdown 🙂						× corray collection ()		
oc		PATIENT ID			PATIENT NAME			<u>TX PF</u>	ESENTED	\$80,847.3		
	1	14/08	Murphree, I	keniee					NO	:heduled tx plans ⑦		
	2	15547	Steelman F	sa David					NO			
	4	16168	Arrington. 0	Tharles					NO			
	5	16298	Strangways	, Katy					NO			
	6	16310	Morgan, Ale	exis					YES			
	7	16349	Coker, Meli	sa					NO			
	8	16430	Fairbanks, K						NO			
	9	16507	Wilson, Jaso	n					NO			
	10	16614	Pternitis, M	argaret					NO			
	11	16637	Dugins, Bro	dy					NO			
	12	16702	Buchanan,	Vichelle					YES			
	13	16710	Vines, Mars	ha					NO			

The KPI Module shows your business key elements performance grouped by Hygiene, Doctors, and Office.

You can also toggle the ALL switch for the overview of the KPIs on all offices.

BRAI All VIEV	D       REGION       Location         V       All       V         Location       V         All       V         Location       V         Locati												
DOC	Cortor - KPI's     E     Search     Q												
#	LOCATION	<u>1. CASE</u> ACCEPT. – SAME DAY	<u>2. CASE</u> <u>ACCEPT. –</u> <u>ROLL. 90</u> <u>DAYS</u>	<u>3. NGST.</u> <u>RECEIVING</u> <u>TX PL.</u>	4. EXI. GST RECEIVING TX PL.	5. AVG. <u>TIME/DOC.</u> <u>APPT.</u> (minutes)	<u>6. AVG.</u> DOC. PROD/HR	<u>7. AVG.</u> <u>DOC.</u> <u>PROD/APPT.</u>	<u>8. SAME</u> DAY TX/NG	9. MOLAR ENDO PROC.	<u>10.</u> INVISALIGN PROC.	<u>11.</u> ENDODONTICS.	
	TOTALS:		-	-			-	-		0	0	12	
	AVG:	3.7%	32.1%	\$1,758.2	\$1,205.0	35	\$594.8	\$258.1	\$270.4	0.0	0.0	4.0	
1	- Marine Balleton	7.53%	<u>30.11%</u>	<u>\$1,046.9</u>	<u>\$799.6</u>	<u>62</u>	<u>\$1,119.0</u>	<u>\$317.03</u>	<u>\$242.49</u>	<u>0</u>	<u>0</u>	<u>8</u>	
2	•	0.00%	<u>44.44%</u>	<u>\$0.0</u>	<u>\$1,242.8</u>	<u>43</u>	<u>\$419.1</u>	<u>\$143.71</u>	<u>\$390.37</u>	Q	Q	<u>0</u>	
3	•	<u>0.96%</u>	<u>31.73%</u>	<u>\$2,282.4</u>	<u>\$1,512.3</u>	<u>9</u>	<u>\$472.3</u>	<u>\$270.25</u>	<u>\$239.60</u>	<u>0</u>	<u>0</u>	<u>4</u>	
	TOTALS:							-		0	0	12	
	AVG:	3.7%	32.1%	\$1,758.2	\$1,205.0	35	\$594.8	\$258.1	\$270.4	0.0	0.0	4.0	



When you click the Break Down button, a modal will appear with a more detailed information about that specific KPI.

14 KPI (Providers)

The **Provider KPI** displays the list of providers with their KPI metrics. You can also toggle the "**ALL**" switch to view all providers across all locations.

	KPI's	KPI's											R 100.00% VATION 100.00%
® ŀ	(PI's												
BF VIEV	BRAND REGION Location   All All     IEW     ALL     Image: All and a state of the state o												
KPI'	(PI'S BY PROVIDER Search Q												
#	PROVIDER	ID	LOCATION	<u>1. CASE</u> <u>ACCEPT. –</u> <u>SAME</u> <u>DAY</u>	<u>2. CASE</u> <u>ACCEPT. –</u> <u>ROLL. 90</u> <u>DAYS</u>	<u>3. NGST.</u> <u>RECEIVING</u> <u>TX PL.</u>	<u>4. EXI. GST</u> <u>RECEIVING</u> <u>TX PL.</u>	<u>5. AVG.</u> <u>TIME/DOC</u> <u>APPT.</u> <u>(min)</u>	<u>6. AVG.</u> Doc. Prod/hr	<u>7. AVG.</u> DOC. PROD/APPT.	<u>8. SAME</u> DAY TX/NG	<u>9. MOLAR</u> ENDO PROC.	<u>11.</u> ENDODONTICS
	TOTALS:									0	8		
			AVERAGE:	7.53%	30.11%	\$1,046.9	\$799.6	59	\$440.3	\$277.19	\$237.3	0.0	2.0
1	R	2		0.00%	0.00%	<u>\$0.0</u>	<u>\$0.0</u>	<u>33</u>	<u>\$11.7</u>	<u>\$63.50</u>	<u>\$89.00</u>	<u>0</u>	<u>0</u>
2	arl	1		7.53%	<u>30.11%</u>	<u>\$1,046.9</u>	<u>\$799.6</u>	<u>62</u>	<u>\$1,119.0</u>	<u>\$317.03</u>	\$242.49	<u>0</u>	<u>8</u>
3		5		0.00%	0.00%	<u>\$0.0</u>	<u>\$0.0</u>	<u>0</u>	<u>\$3.8</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>0</u>	<u>0</u>
4	10,101,711,25110	AS	наприса	<u>0.00%</u>	0.00%	<u>\$0.0</u>	<u>\$0.0</u>	<u>48</u>	<u>\$95.6</u>	<u>\$84.19</u>	<u>\$199.57</u>	<u>0</u>	<u>0</u>
			TOTALS:									0	8
			AVERAGE:	7.53%	30.11%	\$1,046.9	\$799.6	59	\$440.3	\$277.19	\$237.3	0.0	2.0

14 KPI (Specialty)



The **Specialty View** displays key metrics for Oral Surgery, Perio, Endo, and Ortho.

uction per Day - Breakc <sup>Humpries</sup> Marquee	lown 🖻	
#	DATE	PRODUCTION
1	2019-08-01	\$10,627.00
2	2019-08-05	\$8,706.19
3	2019-08-06	\$8,726.00
4	2019-08-07	\$8,232.00
5	2019-08-08	\$9,015.00
6	2019-08-12	\$9,011.98
7	2019-08-13	\$5,755.00
8	2019-08-14	\$8,924.00
9	2019-08-15	\$10,750.00
10	2019-08-19	\$9,859.00
11	2019-08-20	\$8,542.00
12	2019-08-21	\$8,808.00
13	2019-08-22	\$9,572.00
14	2019-08-26	\$8,415.09
15	2019-08-27	\$7,969.25
16	2019-08-28	\$8,730.00
	TOTAL:	\$141,642.51
	AVG:	\$8,852.66



When you click the Break Down button, a modal will appear with more detailed information about that specific KPI.

## 14 KPI (Specialty)

Under **Specialty View**, when you toggle the "**ALL**" switch, all office locations will display, you can choose the specialty in the **Metric** dropdown. In the picture below, you are seeing Ortho view.

	KPI's						① He	ello, MesasixAdn	nin LEDGER RESERVA	100.00% TION 100.00%
® KPI	's								ADVANCED	FILTER
BRAN	ID     REGION     Location       V     All     V								Aug 01 201	9-Aug 31 2019
VIEW <sup>®</sup> M OS - KP	ALL METRIC							5 Sear	rch	Q
#	LOCATION	<u>TOTAL</u> <u>PROD.</u>	<u>AVG. PRO.</u> <u>PER DAY</u>	<u>TOTAL</u> <u>CONSULTS</u>	<u>CONSULTS</u> <u>PER DAY</u>	<u>TX PLAN /</u> <u>EXAM</u>	IMPLANT PLACEMENT <u>#</u>	IMPLANT PLACEMENT S	SEDATION PROD.	EXTRACTION PROD.
	ΤΟΤΑ	S: \$140,720.5		0			0.0	\$0.0	\$1,880.0	\$15,156.0
1 H	umpries	<u>\$140,720.5</u>	<u>\$8,795</u>	<u>0</u>	<u>0</u>	<u>\$0</u>	<u>0</u>	<u>\$0</u>	<u>\$1,880</u>	<u>\$15,156</u>
	ΤΟΤΑ	S: \$140,720.5		0			0.0	\$0.0	\$1,880.0	\$15,156.0

### **14** KPI (Specialty Providers)

Under **Specialty Providers View**, when you toggle the "**ALL**" switch, all office locations will display. You can choose the specialty provider in the **Metric** dropdown. In the picture below, you are seeing the Ortho.

		KPI's								① Hello, Mes	asix LEDGER RESERVA	100.00% TION 99.83%
®	KPI's										ADVANCED	FILTER
BRAND REGION Location   All All   VEW     Image: Non-All and												019-Jul 27 2019
ORTHO - KPI'S BY PROVIDER Search											Q	
#	PROVIDER	TOTAL PRODUCTION	PRODUCTION PER DAY	<u>TOTAL</u> CONSULTS	<u>CONSULTS PER</u> <u>DAY</u>	TOTAL ACTIVE GUEST <u>SEEN</u>	ACTIVE GUEST SEEN / DAY	APPLIANCES	<u>PHASE</u> <u>1</u>	<u>COMPREHENSIVE</u> <u>STARTS</u>	DEBONDS	CONVERSION
1		<u>\$2,500.0</u>	<u>\$2,500.0</u>	<u>1</u>	1	<u>2</u>	<u>2</u>	<u>0</u>	<u>0</u>	1	<u>0</u>	<u>1.00</u>

## **15** OPERATIONS (Overview)

The **Operations** Module has 13 available reports. Each of these reports will be further explained in the succeeding slides.

VIEW BRAND Offices All TOP 20% MID TIER BOT 20%		D Claims Compliance Marketing Offices Offices w/ I Payors Performand Providers Services	a No Retention Se	Diff Last Yr. % Diff Last Yr. Diff Vs. Goals											)19 Q
		Score Card	s	BY OFFICE					PER WORKING DAY			+	PER GUEST VISITS		
#	LOCATIO	DN Trends Spe	cialty	<u>COLL</u>	<u>GST.</u> <u>VISITS</u>	<u>NGST.</u> <u>VISITS</u>	ACT_GST W/RSVN	RETENTION	<u>GST.</u> <u>VISITS</u>	<u>NGST.</u> <u>VISITS</u>	Dow	Download CSV		<u>COLL</u>	<u>PR</u>
1	Humphries	٠	<u>\$180,514</u>	<u>\$169,706</u>	<u>901</u>	<u>39</u>	<u>87%</u>	77%	56	2	Dow	Download PDF Download PNG		\$188	
2		•	<u>\$95,938</u>	<u>\$92,514</u>	<u>484</u>	<u>24</u>	<u>90%</u>	84%	25	1	Dow			\$191	
3		•	<u>\$203,891</u>	<u>\$227,107</u>	<u>1,174</u>	<u>30</u>	<u>92%</u>	85%	42	1	Dow			\$193	
		AVERAGE:	\$160,114	\$163,109	853	31			41	1	\$7,624	\$7,767	\$188	\$191	
		TOTAL:	\$480,343	\$489,327	2,559	93			123	4	\$23,613	\$23,587	\$572	\$572	

PROD – Production
COLL – Collection
GST. VISITS – Guest Visits
NGST. VISITS – New Guests
Visits
ACT GST W/RSV – Active
Guests with Reservations
PROC - Procedure

**Diff Last Yr.** – Shows the difference between the values vs. last years.

**% Diff Last Yr.** – Compares the values from the values 1 year prior in percentages.

**Diff Vs. Goals** – Compares the value vs. the goal set in the same period.
# 15 OPERATIONS (Offices)

The **Offices Report** gives you the list of all the locations assigned to you with data grouped by office, per working day, per guest, and per procedure. And more specific data such as:

- Production,
- Collection,
- Guest visits,
- New guest visits, and
- Active guest with reservation.
- Procedure per reservation visits

PROD – Production
COLL – Collection
GST. VISITS – guest Visits
NGST. VISITS – New Guests Visits
ACT GST W/RSV – Active Guests with
Reservation
PROC - Procedure

VIEV	BRAND	REGION												
Of	fices ~ All ~	All								Compare	15	Jul 01 2	019-Jul 27 20	19
TOF	20% MID TIER BOT 20%										Search	n		Q
						BY OF	FICE					PER WO	RKING DAY	
#	LOCATION	PROD	COLL	<u>GST.</u> <u>VISITS</u>	<u>NGST.</u> <u>VISITS</u>	<u>MKTG</u> NGST.	<u>NGST.</u> LEADS	NGST. UNFILTERED	ACT_GST W/RSVN	RETENTION	<u>GST.</u> <u>VISITS</u>	NGST. VISITS	PROD	<u>c(</u>
1	Apple .	<u>\$87,948</u>	<u>\$57,910</u>	271	<u>61</u>	Q	<u>0</u>	<u>70</u>	<u>72%</u>	44%	17	4	\$5,497	\$:
2	Aubum 🛛	<u>\$101,722</u>	<u>\$107,696</u>	<u>428</u>	<u>63</u>	<u>0</u>	<u>0</u>	<u>83</u>	77%	<u>47%</u>	21	3	\$5,086	\$!
3	Burtooth Cental	<u>\$95,741</u>	<u>\$75,482</u>	<u>378</u>	<u>76</u>	Q	<u>0</u>	<u>79</u>	<u>73%</u>	<u>54%</u>	20	4	\$5,039	\$:
4	Dental Floss	\$52,522	\$44,364	246	<u>42</u>	<u>0</u>	<u>0</u>	<u>46</u>	77%	44%	13	2	\$2,764	\$:
5	Dental Haven	\$46,384	\$26,857	142	<u>29</u>	Q	Q	<u>31</u>	74%	36%	11	2	\$3,568	\$:
6	eliseth	<u>\$75,782</u>	<u>\$66,504</u>	<u>297</u>	<u>53</u>	<u>0</u>	<u>0</u>	<u>57</u>	<u>78%</u>	<u>60%</u>	17	3	\$4,458	\$3
7	Founde	<u>\$101,070</u>	\$79,789	<u>351</u>	<u>54</u>	<u>0</u>	<u>0</u>	<u>68</u>	<u>77%</u>	<u>57%</u>	18	3	\$5,053	\$3
8	Freshillwath 0	<u>\$49,375</u>	<u>\$37,703</u>	<u>165</u>	<u>56</u>	<u>0</u>	<u>0</u>	<u>57</u>	<u>63%</u>	<u>20%</u>	10	3	\$2,904	\$2
9	Good Year 0	<u>\$59,585</u>	<u>\$44,239</u>	243	<u>70</u>	Q	<u>0</u>	<u>74</u>	<u>65%</u>	22%	13	4	\$3,136	\$:
10	Happy Tooth	<u>\$84,541</u>	<u>\$75,614</u>	263	<u>53</u>	<u>0</u>	<u>0</u>	<u>63</u>	72%	38%	15	3	\$4,973	\$4
11	Janvis	\$46,431	<u>\$44,071</u>	<u>198</u>	<u>72</u>	<u>0</u>	<u>0</u>	<u>74</u>	57%	<u>10%</u>	12	4	\$2,731	\$2
12	Washington	<u>\$58,391</u>	<u>\$52,579</u>	236	<u>67</u>	<u>0</u>	<u>0</u>	<u>73</u>	<u>63%</u>	<u>16%</u>	14	4	\$3,435	\$:
	AVERAGE:	\$71,624	\$59,401	268	58	0	0	65			15	3	\$4,073	\$3
	TOTAL:	\$859,492	\$712,810	3,218	696	0	0	775			181	39	\$48,645	\$39

# 15 OPERATIONS (Trends)

VIEW BRAND REGION Column		
Trends ~ All ~ BYO Production   BYO - By Office	BYO Production     BYO Collection     BYO Gst Visits     BYO Nsgt Visits     BYO Active Gst	∐ Aug ∨ 2019 ∨
<ul> <li>The Trends Report displays the <u>trailing 12 months</u> reports:</li> <li>BYO Production - Production of each of the locations</li> </ul>	PWD Production PWD Collection PWD Gst Visits PWD Nsgt Visits PPV Production PPV Collection	
<ul> <li>BYO Collection – Collection of each of the locations.</li> <li>BYO Gst Visits – Guest visits of each of the locations.</li> <li>BYO Nest Visits – New guest visits of each of the locations.</li> </ul>	PPV Procedures PP Production PP Collection	<b>PROD</b> – Production <b>COLL</b> – Collection
<ul> <li>BYO Active Gst – Active guests of each of the locations.</li> <li>PWD Production – Per working day production of each of the locations.</li> <li>PWD Collection – Per working day collection of each of the locations.</li> </ul>		<b>NGST. VISITS</b> – Guest Visits <b>ACT GST W/APT</b> – Active guests with Reservation
<ul> <li>PWD Conection – Per working day conection of each of the locations.</li> <li>PWD Gst Visits – Per working day guest visits of each of the locations.</li> <li>PWD Nsgt Visits – Per working day new guests visits of each of the locations.</li> </ul>		<b>PROC</b> - Procedure <b>BYO:</b> By Office Location <b>PWD:</b> Per Working Day
<ul> <li>PPV Production – Per guest visits production of each of the locations.</li> <li>PPV Procedures – Per guest visits procedures of each of the locations.</li> <li>PP Production – Per procedure production of each of the locations.</li> </ul>		Gst: Guest NGst: New Guest PPV: Per Patient Visit PP: Per Patient
• <b>PP Collection</b> – Per procedure collection of each of the locations.		

# 15 OPERATIONS (Providers)

VIE	V BRAND REG	ION LC	DCATION All		~						Compare	15	Aug 01 2019-Au	g 31 2019
то	P 20% MID TIER BOT 20%											Search		Q
			BY PRO	OVIDER			PER WORK	ING DAY		PE	R GUEST VISIT	s	PER PROC	EDURE
#	PROVIDER	PROD	COLL	GST. VISITS	NGST. VISITS	GST. VISITS	NGST. VISITS	PROD	COLL	PROD	COLL	PROC	PROD	COLL
1	BATES, M-JESSICA - MID	<u>\$12.117</u>	<u>\$14,674</u>	129	1	6	0	\$551	\$667	\$94	\$114	2	\$52	\$64
2	Shatti, Lori - L8	<u>\$13,051</u>	<u>\$11,045</u>	<u>131</u>	4	8	0	\$768	\$650	\$100	\$84	2	\$41	\$35
3	BORDERS, ABIGAL - AGB	<u>-\$324</u>	<u>\$21</u>	<u>0</u>	<u>0</u>	0	0	\$0	\$0	\$0	\$0	0	\$0	\$0
4	Carroll, D.M.D, Thomas F TFC	<u>-\$7</u>	<u>50</u>	Q	<u>0</u>	0	0	\$0	\$0	\$0	\$0	0	\$0	\$0
5	CARROLL, THOMAS F MTC	<u>\$13,465</u>	<u>\$19,027</u>	<u>88</u>	2	7	0	\$1,036	\$1,464	\$153	\$216	1	\$106	\$150

1. **BY Provider Production** – Production of providers on the selected office and date range.

- 2. BY Provider Collection Collection of providers on the selected office and date range.
- **3. BY Provider Gst Visits** Guest visits of providers on the selected office and date range.
- 4. **BY Provider NGST Visits** New guest visits of providers on the selected office and date range.
- 5. BY Provider Active Gst Monthly active guests of each of the locations.
- 6. **PWD Gst Visits** Provider's per working day guest visits on the selected office and date range.
- 7. **PWD NGST Visits** Provider's per working day new guest visits on the selected office and date range.
- 8. **PWD Production** Provider's per working day production on the selected office and date range.
- 9. **PWD Collection** Provider's per working day collection on the selected office and date range.
- **10. PPV Production** Provider's per guest visit production on the selected office and date range.
- **11. PPV Collection** Provider's per guest visit collection on the selected office and date range.
- **12. PPV Procedures** Provider's per guest visit procedures on the selected office and date range.
- **13. PP Production** Provider's per procedure production on the selected office and date range.
- **14. PP Collection** Provider's per procedure collection on the selected office and date range.

## The Providers Report

displays production, collection, guests visits, new guest visits, and guest procedures grouped by provider, working day, guest visits and procedure.

PROD – Production
COLL – Collection
GST. VISITS – Guest Visits
NGST. VISITS – New guest Visits
ACT GST W/APT – Active guests
with Reservation
PROC - Procedure
BYO: By Office Location
PWD: Per Working Day
Gst: Guest
NGst: New Guest
PPV: Per Patient Visit
PP: Per Patient

# 15 OPERATIONS (Compliance)

VIE	V BRAND ompliance V All	REGION V All V	All	~							Compare	16	Jul 01 2019-	Jul 31 2019
ТО	P 20% MID TIER BOT 20%										Ċ.	Search		Q
					PER WORK	KING DAY			PE	R GUEST VISIT	s			PER PROC
#	PROVIDER	LOCATION	PROD	GST. VISITS	PROD	PROC	PROD	PROC	FILLINGS	CROWNS	EXT	PO	ROOT CANALS	PROD
1	BATES, M-JESSICA - MSD	Western	\$14,502	<u>137</u>	\$580	10	\$106	2	0.000	0.000	0.000	0.000	0.000	\$56
2	Bhatti, Lovi - LB	Weissman	<u>\$8,597</u>	<u>116</u>	\$409	13	\$74	2	0.000	0.000	0.000	0.000	0.000	\$32
3	Carroll, D.M.D, Thomas F TFC	Wester	<u>-\$45</u>	<u>0</u>	-\$9	3	\$0	0	0.000	0.000	0.000	0.000	0.000	-\$3
4	CARROLL, THOMAS F MTC	Western	\$28,005	<u>137</u>	\$1,400	11	\$204	2	0.241	0.000	0.080	0.000	0.000	\$131
5	Castro-Oldham, Antonia - ACD	Welsoman	<u>\$7,401</u>	<u>107</u>	\$411	11	\$69	2	0.000	0.000	0.000	0.000	0.000	\$36

## 1. **Production** - Production of providers on the selected office and date range.

- 2. **GST Visits** Provider's overall guests seen during a selected date span.
- **3. PWD Production** Provider's per working day production on the selected office and date range.
- 4. **PWD Procedure** Provider's per working day procedures on the selected office and date range.
- 5. **PPV Production** Provider's per guest visit production on the selected office and date range.
- 6. **PPV Procedure** Provider's per guest visit procedure on the selected office and date range.
- 7. **PPV Fillings** Provider's per guest visit fillings on the selected office and date range.
- 8. **PPV Crowns** Provider's per guest visit crowns on the selected office and date range.
- 9. **PPV Extractions** -Provider's per guest visit extractions on the selected office and date range.
- **10. PPV Pulpotomies** Provider's per guest visit pulpotomies on the selected office and date range.
- **11. PPV Root Canals** Provider's per guest visit root canals on the selected office and date range.
- **12. PP Production** Provider's production per procedure on the selected office and date range.

## The Compliance Report

shows production, guests visits and complex operations of the providers.

PROD – Production
COLL – Collection
GST. VISITS – Guest Visits
NGST. VISITS – New guest Visits
ACT GST W/APT – Active guests
with Reservation
PROC - Procedure
BYO: By Office Location
PWD: Per Working Day
Gst: Guest
NGst: New Guest
PPV: Per Patient Visit
PP: Per Patient

# 15 OPERATIONS (Payors)

VIEV	yors V BRAND REC	SION LO	All Y							Compare	15	Jul 01 2019-	Jul 31 2019
TOP	20% MID TIER BOT 20%									Ŀ	Search		Q
				BY PAYOR				PE	R WORKING DA	Y	PER GUES	T VISITS	PER PROC
#	PAYOR	PAYOR ID	LOCATION	PROD	% OF TTL	GST. VISITS	NGST. VISITS	GST. VISITS	NGST. VISITS	PROD	PROD	PROC	PROD
1	1st Franklin Fin Corp	868	Humphries	\$103	0%	1	0	1	0	\$103	\$103	4	\$26
2	AARP	395	Weissman	\$1,062	0%	7	0	7	0	\$1,062	\$1,062	14	\$531
3	AAIP Medicare Complete	892	Hamphries	\$497	0%	2	2	1	1	\$249	\$249	4	\$71
4	AASI	89	Humphries	\$2,571	0%	4	0	1	0	\$643	\$643	3	\$198

- 1. **Production** Production of dental insurances on the selected office and date range.
- 2. % of TTL Percent of each production value with the total table calculation.
- **3. GST Visits** Guest visits of dental insurances on the selected office and date range.
- 4. **NGST Visits** New guest visits of dental insurances on the selected office and date range.
- 5. **PWD GST Visits** Per working day guest visits of dental insurances on the selected office and date range.
- 6. **PWD NGST Visits** Per working day new guest visits of dental insurances on the selected office and date range.
- **7. PWD Production** Per working day production of dental insurances on the selected office and date range.
- 8. **PPV Production** Per guest visit production of dental insurances on the selected office and date range.
- 9. **PPV Procedure** Per guest visit procedures of dental insurances on the selected office and date range.
- **10. PP Production** Per procedure production of dental insurances on the selected office and date range.

The **Payors Report** shows your production, collection, and new and existing guests visits grouped by payor, per working day, per guest visits, and procedure.

PROD – Production
COLL – Collection
GST. VISITS – Guest Visits
NGST. VISITS – New guest Visits
ACT GST W/APT – Active guests
with Reservation
PROC - Procedure
BYO: By Office Location
PWD: Per Working Day
Gst: Guest
NGst: New Guest
PPV: Per Patient Visit
PP: Per Patient

# 15 OPERATIONS (Services)

VIEW BRAND REGION LOCATION Services ~		Compare 🕁 📅	Aug 01 2019-A	Nug 31 2019
Services	New Guest Seen vs Goal	Age Brackets		
		AGES	# OF ACTIVE	% OF TTL
6.9%	N/A MONTH TO DATEIN/A YEAR TO DATE	0-9	20	1.1%
7.5%	New Visits 0 New Visits 1,728	10-19	85	4.5%
		20-29	436	21.2%
7.8% Top 10 Services 50.9%	Goal 0 Goal 0	30-39	438	19.6%
8.5%		40-49	405	16.8%
		50-59	416	16.4%
13.3%		60-69	460	17.3%
		> 70	386	20.9%
Credit Account On Closing of claim EPORODIC ORAL EVALUATION		Unknown	13	0.5%
PROPHYLAXES-ADULT II TOPICAL APPLICATION OF FLUORDE Periodic oral evaluation II Prophylaxis adult III PERIODIC ORAL EXAMPLETION				

## Services

Displays the top 10 services rendered on the selected office and date range (based on their production values)

## **NGST Seen vs Goal**

Displays if the New guest Visits reached the set Goal or not. The report also shows the Month to Date and Year to Date new guest visits data.

## Age Brackets

Displays the guest age brackets and how many guests belong in a specific bracket.

# **15** OPERATIONS (Services)

Displays the list of services with its count, total fee, and % of TTL on the selected office and date range and location. You can also use the Search Bar to search for the service name, code, type, count, total fee or % of TTL.

ТО	P 20% MID TIER BOT 20%			Search	Im	Q
#	<u>SERVICES</u>	CODE	TYPE	<u>COUNT</u>	TOTAL FEE	<u>% OF TTL</u>
1		9999	Unidentified	166	-\$1,045	-1%
2		9999	Unidentified	202	-\$5,464	-6%
3	03320 ROOT CANAL-BICUSPID (EX. FINAL REST.)	3320	ENDODONTICS	7	\$2,694	1%
4	06080 IMPLANT MAIN. PROCEDURES	6080	IMPLANT SERVICES	4	\$0	0%
5	3 surface,posterior /resin-based composi	D2393	BASIC	10	\$1,729	2%
6	5 Year Warranty	0	Undefined	20	\$4,640	5%
7	ABUT. SUPP. PORC. FUSED TO METAL CRN	D6059	IMPLANT SERVICES	1	\$1,076	1%
8	Abutment supported porc/cer crn	D6058	Implant Serv	6	\$8,871	4%
9	ABUTMENT SUPPORTED PORC/CERAMIC CROWN	D6058	CROWNS	7	\$7,532	4%
10	ADD CLASP TO EXISTING PARTIAL DENTURE	5660	PROSTHODONTICS, REMOVABLE	1	\$191	0%
11	ADD TOOTH TO EXISTING PARTIAL DENTURE	5650	PROSTHODONTICS, REMOVABLE	2	\$330	0%
12	Adjust Bite	AB	MISCELLANEOUS	2	\$0	0%
13	Adjust complete denture-mand	D5411	Prosth, remov	1	\$0	0%
14	Adjust complete denture-maxil	D5410	Prosth, remov	1	\$0	0%

# **15** OPERATIONS (Services)

The **Performance Report** displays production, collection, guests seen, new guests visits; and incoming production and scheduled by day for the selected month.



ACT – Actual
COLL – Collection
PROD – Production
GST VISITS – guest Visits
NGST VISITS – New guest Visits
NEW GST – New guests
ACT + PROD – Sum of the Actual
Production and Scheduled
Production.

The **Marketing Report** has two sub reports: (1) Default and (2) guest Analysis. This report is also available in the Marketing Module.



The 3 Charts above displays the top 10 referrals, payors and employees. Please note that you can hover into the graph legend to highlight it.

		oksville	7917	1	K	Min -				E T R	Тор	10 Zip Codes		Aug 1 2019 - Au	ig 31 2019
Map	Harts	Somervil	lle	Jnion Hill						<b>F</b> vffe	#		ZIP CODE		<u>NGST.</u> <u>VISITS</u>
Danville			Florette	18.			1 1	Gr	ove Oak		1	35016			42
Darivine	1 AM				Union Gro	ove			: \./		2	35976			6
	F	Falkville				Guntersv	ville	Asbury	Coroldino		3	35019			5
Andrews Chapel	V7-		Eva	E	gypt	1. 1. 125	5 N		Geraldine	$\Delta L$	4	35031			5
	72			Jopp	Arab		5	1	D	e 🗛	5	35087			4
				Baileyton	T		Albert	ville	Crossville	Coll	6	35175			4
	West Poi	nt South	Fairview				$\sim$			1	7	35055			3
Jones Ch	apel	H			Summit	Horton		Boaz		+	8	35083			3
		Cullman		Holly Pond	Y.Y	Douglas		Sardis City	Yancy	_	9	35621			2
Googl	Eogan		4		Brooksville	Map data ©2019 Google	10 km 드	Mountainboro Ter	rms of Use Report a	a map error	10	35962			1
ò	3	6	9	12	15	18	21	24	27	30					
Ŷ	5	U U	-	12	15	10	21	21	27	50				TOTAL:	75

## Heatmap

Displays a map with varying temperatures that will help you determine where your guests mostly come from.

## Top 10 Zip Codes

Lists the top zip codes where your guests are from.

**Referral Source** - New guests – displays all the referral sources of your new guests and their respective production, guest visits, production per guest data and % of TTL.

**Payor Source** - New guests – displays all the payor source of your new guests with their production, guest visits, production per guests and % of TTL.

Ref	erral Source - New Guests				Ŀ	Aug 1 2019 -	Aug 31 2019	Pay	or Source - New Guests				t I	Aug 1 2019 -	Aug 31 2019
#	REFERRAL	PROD	<u>NGST.</u> <u>VISITS</u>	PROD/GST	<u>AVG</u> Lifetime <u>Visits</u>	<u>AVG</u> Lifetime Production	<u>% OF TTL</u>	#	PAYOR	PROD	<u>NGST.</u> <u>VISITS</u>	PROD/GST	<u>AVG</u> Lifetime <u>Visits</u>	<u>AVG</u> <u>Lifetime</u> Production	<u>% OF TTL</u>
1	No source listed.	\$6,951	<u>39</u>	\$178	2	\$396	100%	1	ALABAMA MEDICALD (EDS)	\$762	2	\$85	1	\$305	23%
								2	All Kids - BC/85 of Alabama	\$447	<u>4</u>	\$112	2	\$164	10%
								3	Ameritas	\$515	3	\$172	2	\$181	8%
								4	BC/85 of AL	\$335	1	\$335	1	\$335	3%
								5	Bue Cross Bue Shield	\$135	2	\$68	1	\$68	5%
								6	Blue Cross Blue Shield of AL	\$135	1	\$135	1	\$135	3%
								7	Cash	\$1,964	<u>11</u>	\$179	2	\$503	28%
								8	OGNA	\$436	3	\$145	3	\$983	8%
								9	Delta Dental	\$1,401	1	\$1,401	1	\$1,401	3%
								10	Dentaquest Cigna Healthoping	\$650	2	\$325	2	\$428	5%
	TOTAL:	\$6,951	39				100%	11	MetLife	\$123	1	\$123	1	\$123	3%
								12	United Concordia	\$48	1	\$48	1	\$47	3%
									TOTAL:	\$6,951	39				100%

**Referral Source** - Returning guests – displays all the referral sources of your existing guests and their respective production, guest visits, production per guest data and % of TTL.

**Payor Source** - Returning guests – displays all the payor source of your existing guests with their production, guest visits, production per guests and % of TTL.

Refer	ral Source - Returning Guests				طا ا	Dec 22 2019 -	Jan 20 2020
#	REFERRAL	PROD	<u>GST. VISITS</u>	PROD/GST	<u>AVG</u> Lifetime <u>Visits</u>	<u>AVG</u> Lifetime Production	<u>% OF TTL</u>
1		\$191.53	<u>5</u>	\$38.31	4	\$406.40	0.52%
2		\$0.00	1	\$0.00	10	\$0.00	0.10%
3		\$0.00	1	\$0.00	3	\$903.00	0.10%
4		\$0.00	2	\$0.00	10	\$1,069.93	0.21%
5		\$1,477.69	<u>15</u>	\$98.51	7	\$1,198.18	1.56%
6		\$1,354.92	<u>16</u>	\$84.68	10	\$1,875.75	1.67%
7		\$449.59	<u>8</u>	\$56.20	8	\$617.93	0.83%
8		\$1,994.51	<u>23</u>	\$86.72	10	\$1,700.55	2.40%
9		\$2,536.20	<u>20</u>	\$126.81	12	\$1,545.45	2.09%
10		\$1,391.25	<u>11</u>	\$126.48	3	\$455.20	1.15%
11		\$306.72	2	\$153.36	7	\$1,720.36	0.21%
12		\$214.19	1	\$214.19	5	\$364.60	0.10%

Referral	Source - Returning Guests				ाम	Dec 22 2019 -	lan 20	350	New Guest via: No So	urce Listed						×
					AVG	AVG		#	GUEST	PRODUCTION	% OF TTL	LIFETIME VISITS	LTV \$	FIRST VISIT DATE	GENDER	AGE
#	REFERRAL	PROD	GST. VISITS	PROD/GST	Lifetime	Lifetime	<u>% C</u>	1	Martinez, Isabella	\$142.07	0.36%	2	\$	2018-07-10	Female	2
		6101.53	-	620.2	VISIUS	Production		2	Rodriguez, Brian	\$0	0%	1	\$	2016-10-13	Male	9
		\$191.53	2	\$38.31	4	\$406.40		3	<u>Guel, Brandon</u>	\$80.3	0.2%	1	\$	2017-07-28	Male	4
2 1		\$0.00	1	\$0.00	10	\$0.00		4	Mendoza, Miranda	\$138.980	0.35%	2	\$	2016-08-02	Female	12
3 1		\$0.00	1	\$0.00	3	\$903.00		-5-	ABREGO, ADRIANNA	\$0	0%	1	\$	2019-03-21	Female	17
4 (		\$0.00	2	\$0.00	10	\$1,069.93		6	<u>Rico, Alexis</u>	\$220.89	0.56%	2	\$	2016-11-01	Female	15
5 1		\$1,477.69	<u>15</u>	\$98.51	7	\$1,198.18		7	GARZA, KATELIN	\$0	0%	1	\$	2020-01-14	Female	13
6 I		\$1,354.92	<u>16</u>	\$84.68	10	\$1,875.75		8	Guerrero, Jose	\$0	0%	2	\$	2017-02-28	Male	11
7 1		\$449.59	<u>8</u>	\$56.20	8	\$617.93		9	Lara Elizabeth	\$155.99	0.39%	1	\$	2017-10-16	Female	9
8 1		\$1,994.51	<u>23</u>	\$86.72	10	\$1,700.55		10	Ramirez Christofer	\$331.15	0.83%	2	¢	2016-08-19	Male	11
9 1		\$2,536.20	20	\$126.81	12	\$1,545.45		11		03	0.65%	2	ې د	2010-00-13	Male	17
10 I		\$1,391.25	11	\$126.48	3	\$455.20		12		30	070	1	ې د	2019-09-27	Mat Casa:Faul	17
11		\$306.72	2	\$153.36	7	\$1,720,36		12	MALDONADO, MELISSA	\$0	0%	1	\$	2020-01-14	Not Specified	9
12 /		\$714.10	- 1	\$214.10	5	\$364.60		13	Juarez, Yandel	\$0	0%	2	\$	2017-03-24	Male	10
12 1		JZ14.19	1	\$214.19	C	J304.00		14	<u>Cruz, Julian</u>	\$260.160	0.66%	3	\$	2016-09-08	Male	7
								15	Castillo, Erika	\$0	0%	1	\$	2019-06-24	Female	37

Click on the GST. VISITS count to view all the guests from the source selected.

The breakdown lists the guests, their production, % of TTL, Lifetime Visits, Lifetime Visits Production, First Visit Date, Gender, and Age.

You can click on the guest Name to see detailed guest information. (Please see next slide)

## 15

# **OPERATIONS** (Marketing)

GUEST DAT	A	×
INFORMATION	NOTES TX PLANS LEDGER	
PERSONAL INFO	ORMATION	
NAME	Createring 10%	
GENDER		
AGE		
RESP PARTY	Sum has	
WORK PHONE		
CELL PHONE		
HOME PHONE	(NUCLEAR AND A STATE OF A STATE O	
EMAIL		
INSURANCE INF	ORMATION	
POLICY HOLDER	Complex high	
RELATIONSHIP	147	
REMAINING BEN	EFITS	
DEDUCTIBLE	1	
EMPLOYER	AND NUMPER OF	
GROUP #	1000 C	
GROUP NAME	AND TRANSPORTED	
FEE SCHEDULE		
INSURANCE NAM	ME	
CONTACT INFO	allow) The second	

### GUEST DATA

INFORMATION	NOTES TX PLANS	LEDGER				( th
DATE	PROVIDER	STATUS	CODE	DESC	AMOUNT	BALANCE
2011-05-12	Humpton, Call	Scheduled	30002	Suture Removal	\$0	\$0
2011-09-28	manghing, Carl	Unscheduled	D1204	Fluoride w/o prophylaxis-adult	\$16	\$0
2012-04-04	Normal, Trees	Scheduled	D0120	Periodic oral evaluation	\$22	\$0
2012-04-04	Noticet, Start	Scheduled	D1110	Prophylaxis-adult	\$48	\$0
2018-10-03	Notice, Trees	Scheduled	D1110	Prophylaxis-adult	\$48	\$0
				TOTAL	6124	50

DESC	DATE	NOTE
	2019- 08-22	Credit CardVISA XXXXXXXXXXXXXXXXXX5228 from 8/5/2019 was redistributed
	2019- 08-21	Prim Insurance Claim from August 5, 2019 was closed.
	2019- 08-21	Service D2393 was Modified Aging Date of Service was changed from 8/5/2019 to 8/21/2019
	2019- 08-21	Service D2392 was Modified Aging Date of Service was changed from 8/5/2019 to 8/21/2019

IN ONMATIO	INDIES INTE	ins Leboln					
DATE	PROVIDER	DESC	INSURANCE	SURFACE	BALANCE	тоотн	AMOUNT
2011-05-12	Humphries, Carl	Extraction-impacted/part bony	Aetna		0	17	\$203
2011-05-12	Humphries, Carl	Extraction-impacted/part bony	Aetna		0	32	\$203
2011-05-12	Humphries, Carl	Non-intravenous Conscious Sedation	Aetna		0		\$250
2011-05-12	Humphries, Carl	Analgesia	Aetna		0		\$22
2011-05-12	Humphries, Call	Extraction-surgical/erupt tooth	Aetna		0	1	\$104
2011-05-12	Humphries, Carl	Extraction-surgical/erupt tooth	Aetna		0	16	\$104
2017-05-04	Hamphries, Carl	Resin-based comp 3 surf pos	Aetna	MBD	0	28	\$137
2018-10-03	Humphries, Call	Periodic oral evaluation	Aetna		0		\$22
2018-10-24	Humphries, Carl	Resin-based comp 3 surf pos	Aetna	MDB	0	19	\$137
2018-10-24	Humphries, Carl	Resin-based comp 3 surf pos	Aetna	MDB	0	21	\$137
2018-10-24	Humphries, Carl	Resin-3 surf. adult-anterior	Aetna	MDF	0	22	\$108

×

# 15 OPERATIONS (Marketing | Guest Analysis)

## You can view this report when you click on the **GST. Analysis Report Type**.



NGST Seen vs Goal – Bar graph that displays your new guests seen vs your goal.
Age Brackets – Displays the number of active guests that belongs to a specific age group.
Guest Gender – The Doughnut chart displays the percentage of Male and Female guests.

## **OPERATIONS (Marketing | Guest Analysis)** 15

The **New Guest Seen Volume** graph displays the number of new guests seen vs. the goal you set. You can also view your Daily, Weekly, or Monthly graph data.



Show daily, weekly and monthly data

# 15 OPERATIONS (Claims)

The **Claims Report** shows any claims submitted that day.

The columns 1, 2, 3 .. 31 represent each day of the month.

- **Y** means there was a **claim**
- N means there was no claim

Operations																												Hello,	Mes	asixAc	lmin
A Operations																											AD'	VANCEI	) FILTE	R	
VIEW BRAND Claims ~ All TOP 20% MID TIER BOT 20%	RI	EGION All	~																						↓ 	15 Search	Aug	~	201	19	~ Q
# LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
1 H · · ·	Y	Ν	Ν	Ν	Υ	Υ	Υ	Y	Ν	Ν	Ν	Y	Υ	Υ	Y	Ν	Ν	Ν	Y	Υ	Υ	Y	Ν	Ν	Ν	Y	Y	Y	Y	Ν	Ν
2 W	Y	Ν	Ν	Ν	Y	Υ	Υ	Y	Ν	Ν	Ν	Y	Y	Y	Y	Ν	Ν	Ν	Y	Υ	Υ	Y	Ν	Ν	Ν	Y	Y	Y	Y	Ν	Ν
3 W	Y	Y	Ν	Ν	Y	Y	Y	Y	Y	Ν	Ν	Y	Y	Y	Y	Y	Ν	Ν	Y	Y	Y	Y	Y	Ν	Ν	Y	Y	Y	Y	Y	Ν

# **16** PATIENT PORTAL (Patient List)

The **Patient Portal** module displays the list of all your patients per office location. The patient reminder is also found in this dashboard.

The **Patients tab** displays all patients for that office. You can add filters to granularize the data displayed. In this example, the table is filtered by patients aged between 20 to 30 years old.

Patient P	ortal					① Hello, M	MesasixAdmin
<sup>20</sup> Patient P	ortal						
BRAND	LOCATION	VIEW  VIEW  VIEW  Reminders	SETUP & Auto Re	minder			
FILTERS Add Filters	∽ SAVE						
TOTAL RESUL	TS: 17,037			년 🖒 Display Column (2	) ~ Search	Q SEA	RCH PATIENTS
			NAME			AGE	BIRTH DATE
***	e					56	1962-11-12
***	У.					37	1981-09-26
***	ĺ0					0	
***	as					66	1952-12-07
***	<u>dy</u>					53	1965-10-11
***	ifer					40	1978-09-28
***						9	2009-09-14
***	shua					35	1983-11-28

# 16 PATIENT PORTAL (Filters)

cm These are the available patient **filters**. Patient Portal **GENDER FILTER** × AGE FILTER <sup>20</sup> Patient Portal GREATER THAN LESS THAN CONDITION EQUAL CONDITION ✓ BETWEEN BRAND LOCATION 20 TO 30 VALUE(S) VALUE(S) (m) MALE V FEMALE LAST SEEN FILTER BALANCES FILTER X  $\times$ FILTERS ✓ Add Filters SAVE CONDITION ✓ EQUAL CONDITION V EQUAL **GREATER THAN** GREATER THAN Age LESS THAN VALUE LESS THAN VALUE(S) IN DAYS Gender BETWEEN D37 Balances Last Seen

Click the Save button to save the filters you added. When you visit the Patient List page again, it will automatically filter the patients.



FILTERS										
Add Filters ~ SAVE	AGE between 20 to 30 🛞	GENDER = female $\otimes$	BALAI	NCES > 100 🛞						
C)	2112					_				
TOTAL RESULTS: 2						උ Di	splay Column	(9)	~ Search	
	NAME		AGE	BIRTH DATE	GENDER	AD	DRESS	<u>CITY</u>	STATE	PHONE
<u>C</u>			24	1994-09-05	FEMALE	147.	Ave	-	OK	(ç
G			30	1989-03-10	FEMALE				OK	(ç

## Jarvis Analytics | 12377 Merit Dr, Ste 225, Dallas, TX 75251 | 866-9-JARVIS (527-847) | support@jarvisanalytics.com

# 16 PATIENT PORTAL (Patient List)



To create a reminder for multiple patients, click on the checkbox beside the patient name and then click on the "*Create Reminder*" button.

## Click log button to refresh the data.



In the "**Display Column**" dropdown, you can filter the columns you want to see by clicking the checkbox corresponding to the column name.

To search for a patient, enter the patient name in the search bar and click the "*Search Patient*" button.

FILTERS								
Add Filters V SAVE								
TOTAL RESULTS: 978 CREATE REMINDER				J.	Display Column (9)	Search	Q S	
	AGE	BIRTH DATE	GENDER	ADDRESS VIII	BIRTH DATE	PHONE	EMAIL	
	2019	0001-01-01	NA		GENDER			0001-01-01
	2019	0001-01-01	NA		FIRST VISIT			0001-01-01
E E	13	2006-02-14	NA		AGE			2019-03-21
E E	15	2003-12-14	FEMALE		ADDRESS			2019-02-11
<u>k</u>	10	2008-05-07	Male					2019-02-11
E E	32	1986-05-26	FEMALE					0001-01-01
E E	13	2005-07-10	Male			ŝ		2019-02-28
L E	2	2016-04-28	NA					2019-02-21
<b>₽</b>	2019	0001-01-01	Male		EMAIL		א אנט פרע הינגע לא אינטיינקא אינטי 🗁 אינט פרע אינע אינע אינע אינע אינע אינע אינע אינ	0001-01-01

# 16 PATIENT PORTAL (Manual Reminder Setup)

You are able to manually add a reminder for a single patient or multiple patients. To do so, follow these steps:

- 1. Select patient(s) in the Patient List.
- 2. Click the "*Create Reminder*" button.
- 3. Wait for this window to populate, and then select the reminder type.
- 4. The reminder form will appear below the reminder type list.
- 5. Fill in the reminder date, and assignee.
- 6. Click the "*Add Reminder*" button.



ADD	REMINDER FOR
	Appointment Confirmation
	🔟 Unscheduled Broken Appointment
	Inscheduled Treatment
	😇 Hygiene Recare
	Past Due Account
	😇 Past Due Claims
	围 Post-Op
	Unscheduled Non-hygiene
	Reminder Date: Apr 24 2019 Assigned To:
	Front Desk ~
	mesasixAdmin Steven Maroulis Debby Cummings
	Catherine Maglasang Georgina Felo

# 16 PATIENT PORTAL (Automatic Reminder Setup)

# The **Auto Reminder Setup** allows you automate adding reminders so you do not have to add reminders manually.

AUTO REMINDER SETUP		×
Appt. Confirmation		٢
ENABLE		
DAYS BEFORE UNCONFIRMED APPT.	60	
AUTO ASSIGNED TO:	Catherine Maglasang	
ASSIGN TO:	Front Desk	~
mesasixAdmin Steven Maroulis Debby Cummings	Catherine Maglasang Georgina Felo	
Unscheduled Broken Appt.		٢
⊘ EI	NABLED	
E Unscheduled Treatment		Ø
	NABLED	
15 Hygiene Recare		ø
⊘ EI	NABLED	
Past Due Accounts		ø
⊘ EI	NABLED	
🕫 Past Due Claims		\$
⊘ EI	NABLED	
	DONE AN	ID SAVE

# Patient Portal BRAND LOCATION VIEW SETUP Marquee Humphries Patients Reminders Performance Image: Click the Auto Reminder button for this window to appear.

## To enable Auto Reminder, follow these steps:

- 1. Click the Cog Icon 🙆 for each reminder type.
- 2. Toggle the "*Enable Switch*".
- 3. Set the number of days that applies to each reminder type.
- 4. Select the default assignee.
- 5. Finally, click the "**Done and Save**" button.

The window below displays Patient information like the next visit, last visit, remaining insurance, treatment plans, appointments, hygiene due, patient recall, ltv, reminder activity. Click on the **Family, Activity, Employer, Ledger, TX Plan, and AR Summary** to learn more.

PATIENT INFORMATION		ADD REMINDER ADD NOTES	×
Age: 42 Gender: Male			
© □ ☆	e M		

INFO FAMILY ACTIVITY EMPLOYER LEDGER TX PLAN AR SUMMARY

NEXT VISIT ① NA \$0.00 NA	LAST VISIT ① 2018-02-23 \$632.00 RESTORATIVE BASIC,ADJUNCTIVE GE	REMAINING INSURANCE () \$0.00	Scheduled     Unscheduled
HYGIENE DUE ① NA scheduled: 0	LIFETIME VALUE \$1,492.40	APPOINTMENTS         ①           75%         25%         0%           Completed: 3         Sched: 1         Broken: 0	
inscreduted redentific			DATE DUE: 2019-12-05

If you click on the tiles with the green info button, more detailed information about that metric will show.



Click here to go back to the Patient Info Screen Click this button to add notes, which will be displayed in the Activity tab.



## Last Visit

BACK	TO PATIENT INFORMATION			ADD REMINDER	ADD NOTES
APPOIN	TMENT DETAILS		APP 20	'OINTMENT DATE 18-02-23	status Completed
TYPE RESTORA	TIVE BASIC, ADJUNCTIVE GENERAL	PROV	IDERS COM	NFIRMATON	PRODUCTION \$632.00
RESTORA	TIVE BASIC, ADJUNCTIVE GENERAL	SERVICES	IDERS COM	VFIRMATON	PRODUCTION \$632.00
CODE	TYPE	DETAILS		AMOUNT	PROVIDER
D2393	RESTORATIVE BASIC	RESIN-BASED COMPOSITE-THREE S	URF., POST.	\$632.00	

## Next Visit

€ ВАСК ТО	PATIENT INFORM	ATION		ADD REMINDER ADD NOTES	×
				STATUS	
AFFOINTINE	ENT DETAILS		APPOINTMENT DATE	NA	
TYPE	PROVIDERS		CONFIRMATON	PRODUCTION	
SCHEDULED	PROCEDURES				
CODE	TYPE	DETAILS	AMOUNT	PROVIDER	

## Hygiene Due

⊖ BACK TO	PATIENT INFORM	IATION		ADD REMINDER ADD NOTES
APPOINTM	ENT DETAILS		APPOINTMENT DATE	STATUS
TYPE	PROVIDERS		CONFIRMATION	PRODUCTION
HYGIENE D	UE			

## **Remaining Insurance**

☺ BACK TO PATIENT INFORMATION	ADD REMINDER ADD NOTES

## REMAINING INSURANCE

\$0.00

Deductible

\$0.00

Total

NA NA

PRIMARY INSURA	NCE		INSURANCE CLAIMS		
AL.			Carrier	Est. \$	Date
NA .			Carter-Collier LLC	\$379	2017-11-09
<b>\$0.00</b> Deductible	<b>\$841.00</b> Total	<b>\$0.00</b> Remaining	Carter-Collier LLC	\$555	2017-11-07
SECONDARY INSU	IRANCE				

\$0.00

Remaining

## **Appointment History**

×

) BACK TO PATIENT INFO	RMATION		ADD REM	IINDER AD	D NOTES
APPOINTMENT HISTORY					
PROCEDURES	DESC	PROVIDER	STATUS	AMOUNT	DATE
D0120,D0274,D1110,DELIB	PERIODIC ORAL EVALUATION		Scheduled	\$276	2019-03-05
D2393,FW4L	RESIN-BASED COMPOSITE-THREE SURF., POST.,FREE WHITENING FOR LIFE		Completed	\$632	2018-02-23

## FAMILY

PATIENT INFOR	RMATION					ADD REMINDER	ADD NOTES	×
INFO FAMILY A	CTIVITY EMPLOYER	LEDGER	TX PLAN	AR SUMMARY				
					LAST VISIT	NEXT VISIT	HYGIENE DUE	=
	Active				2019-10-22	2020-06-06	2020-12-06	5
	Active				2019-12-12	2020-06-15	2020-12-15	5

## ACTIVITY

PATIENT INFORMATION	ADD REMINDER	ADD NOTES	×
INFO FAMILY ACTIVITY IMPLOYER LEDGER TX PLAN AR SUMMARY 2020-01-20 16:33:59 by Charlene Naidu Test, Test			
2020-01-20 16:33:50 by Charlene Naidu Note			

EMP	LOYER								LEDGER						
PATIENT	INFORMATION					ADD	REMINDER A	ADD NOTES X	PATIENT INFORMATION				ADD REMINDER	ADD NOTES	×
a.															
INFO FAN	MILY ACTIVITY EMPLOYER LEDG	GER TX F	PLAN AR SU	JMMARY			DATE	DATE	INFO FAMILY ACTIVITY EMPLOYER <b>LEDGER</b> TX PLAN AR	SUMMARY					
CODE	DESC	TOOTH	SURFACE	AMOUNT	PROVIDER	STATUS	PLANNED	SCHEDULED	CODE DESC	тоотн	SURFACE	AMOUNT	PROVIDER	DATE	
D0603	caries risk assessment and documentation, with a finding of high risk	**		\$0		Unscheduled	2019-01-23 00:00:00		D0140 limited oral evaluation - problem focused			\$19		2019-01-23	ļ
D9248	non-intravenous conscious sedation			\$0		Unscheduled	2019-01-23 00:00:00		D0230 intraoral - periapical each additional radiographic image	К		\$12		2019-01-23	J

**TREATMENT PLANS** 

## ACCOUNTS RECEIVABLE SUMMARY

PATIENT	INFORMATION					ADD	REMINDER A	DD NOTES	×	PATIENT INFORMAT	ION			ADD REMINDER	ADD NOTES	×
INFO FAN	MILY ACTIVITY EMPLOYER LEE	GER <b>TX</b>	PLAN AR:	SUMMARY			DATE	DATE		INFO FAMILY ACTIVITY ACCOUNTS RECEIV TOTAL: \$0.00	EMPLOYER LEI	Y INSURANCE CLAIMS:	\$0.00	ESTIMATED PATIENTS: \$0.00		
CODE		TOOTH	SURFACE	AMOUNT	PROVIDER	STATUS	PLANNED	SCHEDULED		CURRENT <b>\$0.00</b>		30+ DAYS <b>\$0.00</b>	60+ DAYS <b>\$0.00</b>	90+ I \$0.	DAYS <b>00</b>	
03330	MOLAR (EX. FINAL RESTORATION)	20	2	000,1¢		Unscheduled	2017-05-10			CODE PATIENT PAYMENTS	<b>DESC</b> 2502		AMOUNT -\$483	<b>PROVIDER</b> Anonymous, Provider	DATE 2017-05-10	D
D6740	CROWN - PORCELAIN/CERAMIC	21		\$772		Unscheduled	2017-05-10			D0330	PANORAMIC FILI	м	\$0	Anonymous, Provider	2017-05-10	С

The **Reminders** tab, lists all automatic and manually added reminders.

The 8 tiles displays the number of reminders from each type.

Below, you'll see two tabs called **Reminders** and **My Reminders**.

**All Reminders tab** – you can see all of the reminders here as well as "take" reminders so – it'll be assigned to you.

**My Reminders tab** – only shows reminders – assigned to you.

You can filter by type, assigned personnel, show – only past due reminders, or search for a specific patient.



The **My Reminders** tab lists all reminders assigned to you.

Here, you can either complete or update a reminder.

✓ ASSIGNED TO: All

Appt. Confirmation

Appt. Confirmation

Unscheduled Broken Appt.

Unscheduled Treatment

**Unscheduled Treatment** 

**Unscheduled Treatment** 

Unscheduled Treatment

MY REMINDERS

REMINDERS

TYPE: All

1 Ahl

2 <u>Ale</u>

3

4 5 Ma

6 Ma

7 Pin

Bal

Bis

To complete a reminder, click on the check icon in the right side o the table corresponding to the patient name.

Complete Rer	ninder						×
Are yo	ou sure you want to	complete r	eminders for /	Ahlem	eier, M	adalynn?	
		Yes Com	plete <mark>i</mark> t!				
	TOTAL RESULTS: 7	Search			Q		
	ATTEMPTS	<u>EST</u>	DUE				
	0	\$0	2019-04-24	$\odot$	15		
	0	\$78	2019-02-11	$\oslash$	15		
	0	\$248	2019-04-24	$\bigcirc$	15		
	1	\$1,316	2019-02-11	$\bigcirc$	15		
	3	\$882	2019-04-23	$\bigcirc$	15		
	0	\$2,727	2019-02-11	$\bigcirc$	15		
	0	\$308	2019-02-11	$\bigcirc$	15		

✓ PAST DUE ONLY:

NAME

To update a reminder, click on the calendar icon and this window to right will appear.

If you attempted to contact the patient, click on the "*Attempt*" button to record your attempt.



KEI	MINDERS MY REMIND	RS					
ΤY	PE: All	TOTAL RESULTS: 7	Search			Q	
#		NAME	ATTEMPTS	<u>EST</u>	DUE		Y
1	Ahle	Appt. Confirmation	0	\$0	2019-04-24	$\odot$	15
2	Alex	Unscheduled Broken Appt.	0	\$78	2019-02-11	$\odot$	15
3	Balc	Appt. Confirmation	0	\$248	2019-04-24	$\bigcirc$	15
4	Bish	Unscheduled Treatment	1	\$1,316	2019-02-11	$\bigcirc$	15
5	Mas	Unscheduled Treatment	3,	\$882	2019-04-23	$\bigcirc$	16
6	Mas	Unscheduled Treatment	0	\$2,727	2019-02-11	$\odot$	15
7	Pins	Unscheduled Treatment	0	\$308	2019-02-11	$\oslash$	15

You can also reschedule a reminder or log if there's no decision made. To do so, just click on the "**Reschedule Reminder**" or "**No decision made**" button; whichever applies. Fill in the date, type, personnel, notes, and finally click the "**Update Reminder**" button to save your changes.

UPDATE REMINDER STATUS		Х	UPDATE REMINDER STATUS	×			
📧 Reschedule Rer	minder	団 No decision made	國 Reschedule Reminder	🔟 No decision made			
April 2019         P           Su         Mo         Tu         We         Th         Fr         Sa           1         2         3         4         5         6           7         8         9         10         11         12         13           14         15         16         17         18         19         20           21         22         23         24         25         26         27           28         29         30  <	Appt. Confirmation Select Personel Add notes		Mo         Tu         We         Th         Fr         Sa           1         2         3         4         5         6           7         8         9         10         11         12         13           14         15         16         17         18         19         20           21         22         23         24         25         26         27           28         29         30	<ul> <li>✓</li> <li>✓</li> <li>✓</li> </ul>			
AhleJynn appt_confirmation 2019-04-23 18:56:39 by Rodzainna Har Patient Reminder Taken	nisain	☐ Attempt Due: 2019-04-24	Ahl      ynn_appt_confirmation         2019-04-23 18:56:39 by Rodzainna Hamisain         Patient Reminder Taken	C Attempt Due: 2019-04-24			

Below is an example of what the reminder logs will look like under the patient's name.

UPDATE REMINDER STATUS										
📧 Reschedule Reminder	TE No decision made									
unscneaulea_treatment	<b>⇔ Attempt Due:</b> 2019-04-23									
2019-04-22 14:29:56 by Rodzainna Hamisain Due date changes: 2019-02-11 to 2019-04-23, User assigned from Rodza This is a test.	ainna Hamisain to mesasixAdmin									
2019-04-22 14:12:34 by Rodzainna Hamisain Patient contact attempted										
2019-04-22 14:11:16 by Rodzainna Hamisain Patient contact attempted										

# 16 PATIENT PORTAL (Performance)

The "View All" tab displays all reminders types. Here, you are also able to download selected reports into CSV files.

## Patient Portal

BRAND	LOC	CATION		VIEW		S	ETUP	
Atlas	~ A	pple	~	A Patien	ts & Reminders	Performance	🕅 Auto Reminder	
View ALL	Appt. Confirr	mation	Unschedule B	roken Appt.	Unschedule Treatments	Hygiene Recare	Past Due Account	Past
	NT CONFIRMA	TION						
<u>_</u> #						NAME		

On this page, you are able to see:

- Total reminders (assigned to individual)
- Attempts made
- Contact made
- % of reminders vs.contacted
- Completed appointments
- Scheduled productions \$\$\$
- % of completed production vs. reminders

							(±1
To download the report to CSV, click	TTL REMINDERS	ATTEMPTS	CONTACTED	<u>%</u>	Completed	Scheduled \$	<u>%</u>
	2	4	2	100%	2	\$4,170	100%

# 16 PATIENT PORTAL (Performance)

The performance tab displays the report for each reminder for your specific reminder types. In this example, we are looking at the **Unscheduled Treatments** performance report.

**Taken Reminders Graph** – displays the percentage of reminders assigned vs. not assigned

**Scheduled Reminders Graph** – displays the percent of the scheduled reminders with respect to the total reminders added for that specific reminder type.

The table at the bottom lists all your agents with their individual performance, the columns include:

- TTL reminders taken
- Number of attempts made
- contacted
- % contacted
- Number of completed reminder
- Amount scheduled
- % scheduled



# 17 PROVIDER (Main)

In the **Providers** module, you can see if a provider is a doctor, hygienist, oral surgeon, Invisalign, periodontist, endodontist, and/or orthodontist.

Providers										) Hello, Me	sasixAdmin				
🕮 Pro	恩 Providers														
Use fi	Use filter to select providers with ID type not set.														
BRAN	BRAND       LOCATION       ALL       VIEW         I       Image: Comparison of the state of th														
Provie	Provider list Search Q											Q			
#	PROVIDER NAME	TYPE	<u>3YRS PROD</u>	LAST ACTIVE	LOCATION	HIDE	PROVIDER ID	DOCTOR	HYGIENE	ORAL SURGERY	INVISALIGN	PERIO	PEDO	ENDO	ORT
1	rl	Dentist	\$4,409,863.0	2019-08-29	Humphries		1								
2		Hygienist	\$153,021.5	2019-08-29	Humphries		2								
3		Hygienist	\$1,674.0	2018-04-12	Humphries		3								
4		Office Staff	\$581.0	2018-07-17	Humphries		4								
5		Dental Assistant	\$15,986.5	2019-08-29	Humphries		5								

## **Apply Default Rules**

We will automatically set the Doc, Hyg, and Ortho based from the data in the database.

## **Clear Rules Set**

Resets the Doc, Hyg, and Ort. This means that all providers <u>will not</u> be assigned.

## Main Tab

Lists all your providers that have production for the past 2 years.

## Hidden Tab

All other providers that are not listed in the Main tab.

A provider can be set into multiple categories. You just have to toggle the switch.
# 17 PROVIDER (Hidden)

The "*Hidden Tab*" displays providers that you do not want to show on Jarvis.

	Providers								① Hello, Mes	sasixAdmin
A Providers										
Use filter to se	elect providers with ID typ	e not set.								
BRAND	LOCATION 25	ALL	VIEW Main Hidden	KPI Doctor Provider	KPI Hidden	APPLY DEFAULT RULES	CLEAR RULES SET			
Hidden Prov	ider list		6					🖾 Sea	rch	Q
#			PROVIDER NAME				LOCATION		PROVIDER ID	SHOW

17 PROVIDER (All)

The "**All**" toggle lists all of the providers across all locations you have access to. This is helpful if you want to update multiple providers.

		Prov	riders											Q	) Hello, Me	sasixAdmin
₽º F	Providers															
Use	filter to seled	ct provi	ders with ID type	not set.												
BRA	BRAND LOCATION ALL VIEW															
Prov	Provider list Search Q															
#	PROVID	<u>DER</u> E	<u>TYPE</u>	<u>3YRS PROD</u>	LAST ACTIVE	LOCATION	HIDE	PROVIDER ID	DOCTOR	HYGIENE	ORAL SURGERY	INVISALIGN	PERIO	PEDO	ENDO	ORT
1	۷ ا		Dentist	\$2,282,244.8	2019-08-29	Weissman		1								
2	C F	эm,	Hygienist	\$228,861.1	2019-08-29	Weissman		ACO								
3	٢	28	Dentist	\$374,247.0	2019-08-28	Weissman		AN								
4	C J	≥s, oke	Hygienist	\$187,584.0	2019-08-05	Weissman		BGH								
5	[ (	rla	Dental Assistant	\$191.0	2019-08-12	Weissman		DGD								



	Dashboard	Settings	D He	ello, Mesasix	<admin< th=""></admin<>
l∮Î S	ettings				
Whe	n there is no goal set on a par	icular date, the default Goal will be used automatically.			
GOA Pro	L oduction		16 Sep	~ 2019	~
	Collection	Se	earch	E.	m <sup>ر</sup>
#	Pts Visits	LOCATION	TYPE	<u>GOAL</u>	ACTION
1	<sup>H</sup> Npt Visits		Production	\$0	[∳ Î
2	<sup>W</sup> Ini. Bonding		Production	\$0	¦∳¦
3	Westen		Production	\$0	ļļî

- 1. Select Goals to show
- 2. Load goal from csv file
- 3. Search for office, type, etc.



The **SETTINGS** Module supports 4 types of Goals, you can see them when you click on the dropdown.



When there is no goal set on a particular date, the default Goal will be used automatically.

### **18** SETTINGS (Upload Production Goals)



Click to Upload Production Goals



Download this template, with instructions on how to enter data.

### Upload Production Goals

×

Please note that this uploader will only set monthly goals and will be automatically used by the system. Please follow the steps listed below for the process to be succesful.

#### Download the system generated <u>template</u>

Note: The template is pre-populate with column header values such as month of goal. For sample purposes, we only populate a single month, but you can freely add a column to suit your needs with no corresponding order needed. Just follow the date format and you're good to go.

- Fill the corresponding goals per month in each office. (Please do not edit 'location' and 'id' column as it will used for mapping)
- Upload the modified CSV and submit.



Click to Upload file

### 18 SETTINGS (Set Goals)

How to add a goal?

- 1. Click on a specific date. The date will turn **green** when selected.
- 2. Enter the amount (goal) in the text field.
- Default daily production goal if no goal is set then default goal will be used. It is calculated by number of working days for the month.
- 4. Click this to use the **Monthly Goal**.
- 5. Fill this up to set **Monthly Goal**
- 6. Click the **Update** button when you're done.

Location								A	15 Son	× 201
Goal				25000	_				Зер	201
Use Monthly	/ Goal			21	Ŋ.				Search	
Default daily	Production C	Goal \$:	d	m.					TYPE	GOAL
			<b>د</b>		0				Production	\$55,0
			A		1m				Production	
<	>		Augus	st 2018	2.22	today			Production	
Sun	Mon	Tue	Wed	Thu	Fri	Sat			Production	
29	30	31	50	2	3	4			Production	
				ψŪ	ţ.				Production	
5	6	7	8	9	10	11			Production	
	\$0	\$0	\$0	\$0	\$0				Production	
12	13	14	15	16	17	18			Production	\$65,
	\$0	\$0	\$0	\$0	\$0					
19	20	21	22	23	24	25	0			
	\$0	\$0	\$0	<b>0</b> <sup>\$0</sup>	\$0		2	Click on the Edit	i label, a	nd a
26	27	28	29	3°C	31	1		modal will appe	ar whicł	ו allo
	\$0	\$0	\$0	\$0	\$0			you to enter you	ur produ	uctio
2	3	4	5	6	7	8		goal for that spe	ecific da	У



8 1							1	<b>I</b>	00.02.01.00.01
Ψ Ι.	x winer						Last o	ata sync: 2018-	J8-03 01:08 Pi
VIEV	N BRAND LOCATION NET TX PLAN								
Tr	eatment Statistics v Brush 32 v						15 Au	iq ~ 2	.018 ~
PRO	V/IDER(S) PROCEDURE(S) PATIENT(S)								
A	I providers 🗴 Add a provider 🛛 All procedures 🗴 Add a procedure 🔹 All patients 🛠 Add a patient GE	T REPORT							
Tre	patment Statistics						Treat	meant Stat	~ 🕑
#	MONTH	TOT TX PL	<u>\$</u> <u>PENDING</u> <u>SCH</u>	<u>\$</u> <u>PENDING</u> <u>USC</u>	ACT PROD	<u>%</u> <u>CLOSED</u>	<u># TX. PL.</u> <u>PRESENTED</u>	<u>AVG \$/TX</u> <u>PL.</u>	<u>% PTS.</u> w/TR. PL
1	2018-02	\$113,181	\$7,487	\$76,502	\$29,192	26%	32	\$3,537	92%
2	2018-03	\$226,117	\$7,666	\$178,231	\$40,220	18%	56	\$4,038	73%
3	2018-04	\$152,134	\$4,447	\$110,307	\$37,381	25%	42	\$3,622	73%
4	2018-05	\$131,333	\$8,266	\$94,332	\$28,736	22%	46	\$2,855	78%
5	2018-06	\$266,634	\$24,985	\$197,040	\$44,609	17%	66	\$4,040	71%
6	2018-07	\$218,225	\$30,434	\$153,748	\$34,043	16%	82	\$2,661	78%
7	2018-08	\$23,254	\$2,843	\$20,386	\$25	0%	9	\$2,584	83%
	TOTAL	\$1,130,878	\$86,126	\$830,546	\$214,206	19%	333		

The **TX Miner** Module displays treatment plan information:

- Total treatment plan \$
- Treatment plans pending schedule
- Treatment plans pending unscheduled
- Actual Production
- Closed percent
- # of treatment plans presented
- AVG \$ per treatment plan
- % of new patients with treatment plan



### The **NET TX PLAN** switch toggles between the exclusion/inclusion of rejected treatment plans on tx miner.

VIEV	BRAND LOCATION NET TX PLAN								
Tre	eatment Statistics v Brush 32 v V v						15 Au	a ~ 20	018 ~
PRO	VIDER(S) PROCEDURE(S) PATIENT(S)								
AI	providers 🗙 Add a provider 🛛 All procedures 🗙 Add a procedure 🔹 Add a procedure 🔹 Add a patient State of the state of	REPORT							
Tre	atment Statistics						Treatr	neant Stat	~
			\$	Ś					
#	MONTH	TOT TX PL	PENDING SCH	PENDING USC	ACT PROD	<u>%</u> CLOSED	<u># TX. PL.</u> PRESENTED	<u>AVG \$/TX</u> <u>PL.</u>	<u>% PTS.</u> <u>w/TR. PL.</u>
1	2018-02	\$113,181	\$7,487	\$76,502	\$29,192	26%	32	\$3,537	84%
2	2018-03	\$226,117	\$7,666	\$178,231	\$40,220	18%	56	\$4,038	86%
3	2018-04	\$152,134	\$4,447	\$110,307	\$37,381	25%	42	\$3,622	88%
4	2018-05	\$131,333	\$8,266	\$94,332	\$28,736	22%	46	\$2,855	89%
5	2018-06	\$266,634	\$24,985	\$197,040	\$44,609	17%	66	\$4,040	92%
6	2018-07	\$218,141	\$30,434	\$153,664	\$34,043	16%	82	\$2,660	90%
7	2018-08	\$23,254	\$2,843	\$20,386	\$25	0%	9	\$2,584	100%
	TOTAL:	\$1,130,794	\$86,126	\$830,462	\$214,206	19%	333		



The Provider(s), Procedure(s), and Patient(s) filters allows you to type in the name or code of the provider(s), procedure(s), and/or patient(s) to view TX miner data specific to them.

								• · · · ·	
₽ T	Miner						Last da	ata sync: 2018-0	8-03 01:08 PM
VIEV	BRAND     LOCATION     NET TX PLAN       watment Statistics     V     Brush 32     V     Image: Statistic statist						15 Au	q ~ 20	018 ~
PRC	/IDER(S) PROCEDURE(S) PATIENT(S)								
AI	providers 🛪 Add a provider All procedures 🛪 Add a procedure All patients 🛪 Add a patient GET R	EPORT							
Tre	atment Statistics						Treatr	neant Stat	~ 🗹
#	MONTH	TOT TX PL	<u>\$</u> <u>PENDING</u> <u>SCH</u>	<u>\$</u> <u>PENDING</u> <u>USC</u>	ACT PROD	<u>%</u> CLOSED	<u># TX. PL.</u> PRESENTED	<u>AVG \$/TX</u> <u>PL.</u>	<u>% PTS.</u> <u>w/TR. PL.</u>
1	2018-02	\$113,181	\$7,487	\$76,502	\$29,192	26%	32	\$3,537	92%
2	2018-03	\$226,117	\$7,666	\$178,231	\$40,220	18%	56	\$4,038	73%
3	2018-04	\$152,134	\$4,447	\$110,307	\$37,381	25%	42	\$3,622	73%
4	2018-05	\$131,333	\$8,266	\$94,332	\$28,736	22%	46	\$2,855	78%
5	2018-06	\$266,634	\$24,985	\$197,040	\$44,609	17%	66	\$4,040	71%
6	2018-07	\$218,225	\$30,434	\$153,748	\$34,043	16%	82	\$2,661	78%
7	2018-08	\$23,254	\$2,843	\$20,386	\$25	0%	9	\$2,584	83%
	TOTAL:	\$1,130,878	\$86,126	\$830,546	\$214,206	19%	333		



When you click on the Treatment Statistics Month, you will be directed to the Patient List Table. Here you can see the amount of Pending Scheduled and Unscheduled Treatment for each patient and other information.

Moreover, you can click on the Patient Name to see more information about the patient.

See Tx Miner												Last da	ata sync: 2020-0	1-20 04:01 PM
VIEW Treatment Statistics ~	BRAND	~	LOCATION Calton	NET TX PLAN								🕁 📅 Jar	n v 21	020 ~
PROVIDER(S)	PRO	CEDURE(S)		GUEST(S)										
All providers 🗶 Add a provider	All	procedures 🗙 A	dd a procedure	All guests 🗙 Add a g	uest	GET REPORT								
Treatment Statistics												Treatm	meant Stat	~ 🛃
#				MONTH			TOT TX PL	<u>\$</u> PENDING SCH	<u>\$</u> PENDING USC	ACT PROD	<u>%</u> CLOSED	<u># TX. PL.</u> PRESENTED	<u>AVG \$/TX</u> <u>PL.</u>	<u>% GST.</u> <u>w/TR. PL.</u>
1 2019-02							\$360,587	\$25,921	\$163,592	\$171,073	47%	188	\$1,918	69%
2 200 m							\$378,967	\$34,140	\$140,458	\$204,370	54%	428	\$885	58%
3 2019							\$327,273	\$40,249	\$114,011	\$173,013	53%	245	\$1,336	52%
4 2019-05							\$327,687	\$55,886	\$115,464	\$156,337	48%	256	\$1,280	60%
5 2019-06							\$351,271	\$72,828	\$96,196	\$182,247	52%	228	\$1,541	62%
6 2019-07							\$345,840	\$61,531	\$109,986	\$174,322	50%	212	\$1,631	67%
7 2010 09							¢211.021	677 200	567665	C145 049	E 204	101	¢1 400	4004



By clicking on the month, you will be able to view all patients with pending treatment..

Tx Mir	ner										① Hello, Stev	ven Maroulis LEDGER 100.00% RESERVATION 99.84%
₽ Tx Miner												Last data sync: 2019-10-08 03:16 AM
VIEW Treatment Statistics PROVIDER(S) All providers X Add a provide	BRAND     LOCATION       Image: state stat	GUEST(S)	ld a guest	GET R	EPORT						C	Jan v 2020 v
Treatment Statistics 2019-0	02									Tr	eatmeant Stat 🗸 🗸	Search Q
	GUEST NAME		CHART #	TYPE	<u>PEND. TX</u> <u>\$ SCH</u>	<u>PEND. TX</u> <u>\$ USC</u>	ACT PROD	REFERRED TO	<u>REM.</u> <u>BENEFITS</u>	<u>STATUS</u>	PREF. PROV.	INSURANCE
				Existing	\$179	\$0	\$0		\$0	1	DL	
				New	\$143	\$6,276	\$208		\$2,000	А	DL	Hamill LLC and Sons
				New	\$0	\$1,308	\$115		\$1,000,000	А	DL	Olson, Jacobs and Kling Group
				Existing	\$208	\$0	\$0		\$2,000	A	DL	Wilkinson, Pfannerstill and Mertz and S
				0	\$0	\$0	\$0		\$0	1	JC	Bogan and Sons LLC

# 19 TX MINER

When you click on the Patient Name, this Patient Data window will appear where you can see the Patient's Information, Insurance Information, Notes, and Ledger Data.

Data. Patient data	×	Account note for patient 107	2018- 08-01	******Pt is still not ready to schedule tx due to medical Bills***JSP
PERSONAL INFORMATIC	5 TX PLANS LEDGER		2018- 06-13	Statement Processed With No Message Included.
GENDER AGE	George Brunner - 107 M 78		2018- 06-08	Prim Insurance Claim from April 4, 2018 was closed.
RESP PARTY WORK PHONE CELL PHONE HOME PHONE	George Brunner		2018- 06-08	Service D0274 was Modified Aging Date of Service was changed from 4/4/2018 to 6/8/2018
EMAIL INSURANCE INFORMATI POLICY HOLDER	ION		2018- 06-08	Service D0150 was Modified Aging Date of Service was changed from 4/4/2018 to 6/8/2018
RELATIONSHIP REMAINING BENEFITS DEDUCTABLE EMPLOYER GROUP #		Account note for patient 107	2018- 06-08	Spoke to Mike (also Ref Info). He said there was no supplemental payments- closed the claim JH
GROUP NAME FEE SCHEDULE INSURANCE NAME CONTACT INFO				

PATIENT DATA

INFORMATION NOTES TX PLANS LEDGER

X

19 TX MINER

PATIENT D	ATA						×					
	N NOTES TX PLANS LEDGE	R										
DR.W∕	PROVIDER	STATUS	CODE		DESC	AMOUNT	BALANCE					
2018-04-02	DMO, DMO	Scheduled	D1110	PROPHYLAXIS-AD	ULT	\$0	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7210	SURGICAL REMOV	AL OF ERUPTED TOOTH	\$50	\$0					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7310	ALVEOLOPLASTY	PATIENT DATA							
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D7310	ALVEOLOPLASTY			-					
2018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D9230	ANALGESIA	INTORMATION NOTE	S TX PLANS	LEDGER					
018-04-04	ORAL SURGERY, ORAL SURGERY	Unscheduled	D9310	CONSULTATION	PROVI	DER	DESC	INSURANCE	SURFACE	BALANCE	тоотн	ŀ
					2018-04- 04	COL	MPREHENSIVE C	RAL ASSURANT EMPLOYEE BENEFITS		0		
					2018-04- 04	BITE	EWINGS-FOUR F	ILMS ASSURANT EMPLOYEE BENEFITS		0		
					2018-04- 04	PAN	NORAMIC FILM	ASSURANT EMPLOYEE BENEFITS		0		
											TOTAL:	



# 20 WATERFALL

The **Waterfall** module helps you see your total gross production, monthly gross production, total payments, monthly total payments and % of payment of gross production over the last 12 months.

(This report is not available for Dentrix)



Filter by Brand, Region and Location

Click to download CSV

Wa	aterfa	ll Report														Hello, Mesasi	xAdmin
Æ	Waterfal	I Report													AD	VANCED FILTER	
BF	and	REGIOI		CATION umphries	~	]			DAYMENTS						Sep	~ 2019	~
#	MONTH	<u>GR. PROD</u>	2018-09	2018-10	2018-11	2018-12	2019-01	2019-02	2019-03	2019-04	2019-05	2019-06	2019-07	2019-08	2019- 09	TOTAL PAYMENTS	% PAYMENT OF GR. PROD
1	2018- 09	\$163,179.25	\$95,744.48	\$43,457.02	\$4,266.65	\$2,028.65	\$2,558.33	\$851.08	\$416.12	\$962.90	\$1,033.65	\$548.30	\$309.80	\$933.50	\$0.00	\$153,110.48	94%
2	2018- 10	\$220,244.75		\$141,311.20	\$43,479.07	\$6,221.28	\$7,831.25	\$2,472.90	\$2,330.85	\$1,085.65	\$1,075.00	\$418.90	\$978.60	\$806.00	\$0.00	\$208,010.70	94%
3	2018- 11	\$177,408.75			\$98,463.79	\$43,296.17	\$10,630.81	\$2,705.90	\$4,372.61	\$1,681.15	\$393.78	\$2,969.04	\$73.80	\$914.10	\$0.00	\$165,501.15	93%
4	2018- 12	\$136,083.75				\$80,242.32	\$25,723.74	\$9,250.31	\$6,760.70	\$2,105.97	\$2,669.64	\$2,068.55	\$2,426.40	\$515.55	\$0.00	\$131,763.18	97%
5	2019- 01	\$209,312.95					\$97,970.29	\$63,143.00	\$14,950.05	\$11,920.65	\$6,090.70	\$1,988.25	\$1,620.21	\$485.43	\$0.00	\$198,168.58	95%
6	2019- 02	\$193,538.00						\$103,200.86	\$54,146.50	\$19,024.01	\$3,961.60	\$1,959.90	\$723.45	\$1,084.65	\$0.00	\$184,100.97	95%
7	2019- 03	\$141,234.75							\$80,671.49	\$32,198.80	\$9,248.98	\$3,320.30	\$2,126.00	\$1,232.43	\$0.00	\$128,798.00	91%
8	2019- 04	\$209,992.25								\$106,248.95	\$66,258.16	\$11,625.22	\$6,460.14	\$1,264.70	\$0.00	\$191,857.17	91%
9	2019- 05	\$201,321.75									\$117,107.66	\$56,791.80	\$6,491.87	\$5,166.60	\$0.00	\$185,557.93	92%
10	2019- 06	\$189,298.25										\$107,805.62	\$53,851.75	\$4,275.05	\$0.00	\$165,932.42	88%
11	2019- 07	\$175,766.20											\$87,577.30	\$59,712.38	\$0.00	\$147,289.68	84%
12	2019- 08	\$181,559.00												\$90,218.94	\$0.00	\$90,218.94	50%
	TOTAL:	\$2,198,939.65	\$95,744.48	\$184,768.22	\$146,209.51	\$131,788.42	\$144,714.42	\$181,624.05	\$163,648.32	\$175,228.08	\$207,839.17	\$189,495.88	\$162,639.32	\$166,609.33	\$0.00	\$1,950,309.20	89%

### **20 BASE DEFINITIONS**

Active PTS #	The number of patients seen in the selected or current date range, whom were seen 12 months prior
Active PTS %	The number of patients seen in the selected or current date range, whom were seen 12 months prior against total number number of patients in %
Adjustment %	The breakdown of the amount of adjustment types divided by total adjustments in %
Adjustment \$	The breakdown of the amount of adjustment types in \$
Collection \$	The total payment collected in \$
Collection Goal %	The percentage of collection against collection goals in %
Hygiene Appointments	Any appointment that was scheduled to a Hygiene provider
Hygiene Reappoint	Any patient walked out to a Hygiene provider within the date range that has a seperate Pre-booked Hygiene Appointment

Hygiene Apt #	The total number of patients having Hygiene Appointments within the date range
Lifetime Production \$	The total amount of production associated with a patient since the start of the patient record in \$
Lifetime Visits #	The number of unique days a patient has been in the office having an actual procedure
New Patient	Any patient with a first time walkout that includes an exam code on the same day
New Patient Visits	The total number of New Patient Visits within the designated date range
NPT Visits Goal %	The percentage of new patient visits against new patient visits goals in %
Procedure / PT #	The ratio of the number of procedures done in total divided by the number of patients seen
Procedures #	The number of procedures done

Production	Shows the amount of production from the ledger in \$
Worked Days	Any single day with production attached
Production / Day \$	The total production of all patients seen divided by the number of days worked in \$
Production / Provider \$	The ratio of total production divided by the number of providers in \$
Production / PT \$	The ratio of total production divided by the total number of patients seen in \$
Production Goal %	The percentage of production against production goals in %
Production per Procedure \$	The total production of all patients seen divided by the number of procedures completed in \$
Pt Visits #	The number of patients with an associated procedure

PT Visits Goal %	The percentage of total patient visits divided by patient visits goals
Hygiene Procedure Codes	Codes that are defined as Hygiene line of business by Type
Hygiene Patients	Any patient walked out to any of the identified Hygiene Procedure Codes
Hygiene Retention Rate	Percentage of Hygiene Patients that completed a return visit at any point within 18 months of their last appointment
Same Day Treatment \$	Any New Guest Prod plus any production over and above what's booked on the schedule
Scheduled NPTS #	The count of new patients who have an appointment
Scheduled Production \$	The amount of production attached to appointments (appointment production) in \$

PTS with Tx Plan %	Percentage of patients that were seen in the current month that were presented a Tx plan
Treatment Acceptance	Any completed or scheduled procedure in a Tx plan
Tx Plan per NPT #	Total Tx plan count (scheduled + unscheduled + completed) divided by the number of new patients seen in the month
Tx Plan per NPT \$	Total Tx plan dollar amount (scheduled + unscheduled + completed) divided by the number of new patients seen in the month in \$
Tx Plan per PT #	Total Tx plan count (scheduled + unscheduled + completed) divided by the number of patients seen in the month
Tx Plan per PT \$	Total Tx plan dollar amount (scheduled + unscheduled + completed) divided by the number of patients seen in the month in \$

Tx Plans Presented #	Number of Tx plans presented (total scheduled + total unscheduled + completed)
Tx Plans Presented \$	Total Tx Plans (total scheduled + total unscheduled + completed) in \$
Tx Plans Presented %	Percentage of patients who had an actual walkout that were presented with a Tx Plan in %
Tx Plans Closed %	Dollar amount of Tx plans that are accepted (scheduled + completed) divided by the total treatment plans presented (scheduled + unscheduled + completed)
Tx Plans Pending Scheduled \$	Dollar amount of Tx plans which are tied to an appointment in \$
Tx Plans Pending Unscheduled \$	Dollar amount of Tx plans which are not scheduled in \$

Tx Plans Rejected	The number of patients who have a scheduled appointment
Tx Plans Rejected #	Percentage of patients that were seen in the current month that were presented a Tx plan
Tx Plans Rejected %	Any completed or scheduled procedure in a Tx plan
Tx Plans Rejected \$	Total Tx plan count (scheduled + unscheduled + completed) divided by the number of new patients seen in the month
Provider Worked Days	Total Tx plan dollar amount (scheduled + unscheduled + completed) divided by the number of new patients seen in the month in \$

Case Acceptance - Same Day	All guests that have production added that day or have scheduled production that day divided by all guests that got a Tx plan that day
Case Acceptance - Rolling 90 Days	All guests that had production added or scheduled within 90 days from the day it was presented divided by all guests that got a Tx plan that day
New Guests Receiving Treatment Plans	The number of new patients seen within the date range that received a treatment plan against the total number of new patients seen
Existing Guests Receiving Treatment Plans	The number of existing patients seen within the date range that received a treatment plan divided by the total number of existing patients seen

Average Time per Doctor Appointment (minutes)	The average time (in minutes) for a restorative reservation based on check in and check out. Filtered by Doctors.
Average Doctor Production per Hour	The sum of total production per Doctor divided by the sum of total working hours per Doctor Assumptions: Monday - Friday 8 hours and Saturday 6 hours
Average Production per Doctor Appointment	The average production \$ amount for every restorative appointment Filtered by Doctors



Perio to Prophy	The number of perio appointments divided by the number of prophy appointments
Avg. Prod. per Procedure	The total production filtered by Hygiene and divided by the number of procedures done (excludes adjustments and deleted entries)
Avg. Prod. Per Day	The total production filtered by Hygienist and divided by the number of working days by provider (days with 100\$ more production are considered working days, excludes adjustments and deleted entries)
# of Varnish app. per day	Sum of total count divided by the number of production days filtered by service code D1206 and filtered by Hygiene provider
Hygiene Appointment	Total number of hygiene visits in the selected timeframe divided by the number of the patients with a Pre-booked HYG Appointment in %

Avg. Prod. per Prov. Per Day	The total production dollars filtered by Doctors and divided by the number of working days by provider (days with 100\$ more production are considered working days, excludes adjustments and deleted entries)
Avg. SRP per day	Sum of total unique patient count who received SRP Procedures divided by the total number of production days
Avg. Fmx per day	Sum of total count divided by the number of production days filtered by service code D0210 and filtered by Hygiene provider



Patient Retention	Shows the percentage of patients seen in the current date range who were also seen for an exam within the last 18 months
Avg. # of Tx plans presented	The number of treatment plans presented on new patients divided by the number of new patients for the current date range
Close Percent per day	The number of treatment plans per day presented divided by the number of treatment plans accepted (Procedures completed or scheduled)
Co-Pay Collection	The total amount of money expected to be collected as a co-pay based on attached insurance plan vs. what was actually collected
\$ in rejected tx plans	How much in dollars of presented treatment plans that patients did not accept

## 21 Q&A

#### 1. Why are the no numbers populating on my dashboard?

• Before you contact support, try clearing your cache. Go to your Google settings and click on History. Click clear browsing history. Then uncheck all of the boxes except for Cached images and file. Click Clear browsing data.

#### 2. How often is the data updated?

• The data displayed in the dashboard is in real-time. Please reload the page if you think the data is not updated. Data updates in sync cycles, depending on the size of the office, there may be a slight delay of up to 15 minutes.

# 3. There is no calendar to change the dates, so how do I know what dates the data is for?

• If there is no calendar, then the data showing is for the previous month. If there is a calendar then it will show whichever date range or month you have chosen.



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# **CONTACT & SUPPORT**

### For technical help:

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- P: 866 9-JARVIS866-952-7847

