



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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1 GETTING STARTED

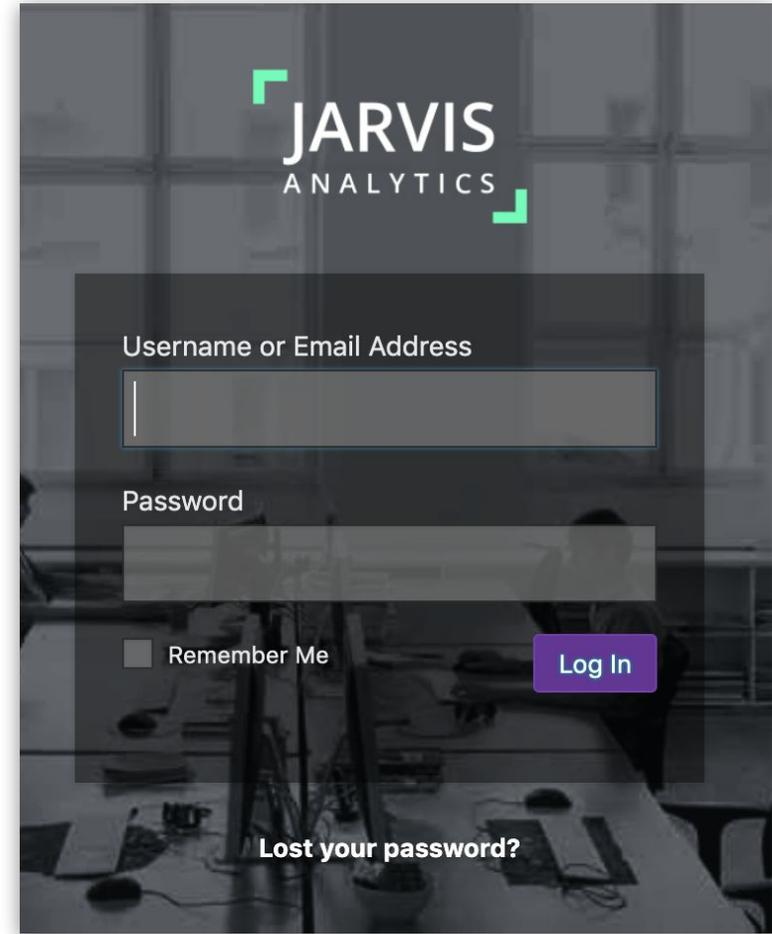
1. Visit <https://jarvisanalytics.mesasix.com/> - You will see the screen to the right.
2. Enter your username/email and password.
3. Click the "**Login**" button and you will be redirected to your dashboard.

Note:

- If you don't have an account yet, email support@jarvisanalytics.com 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.

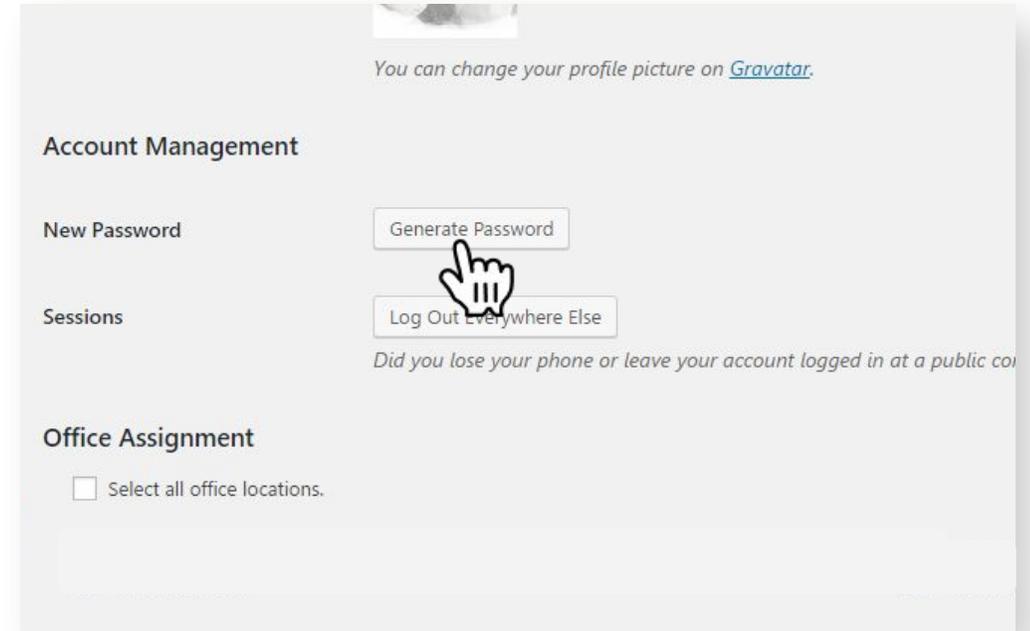
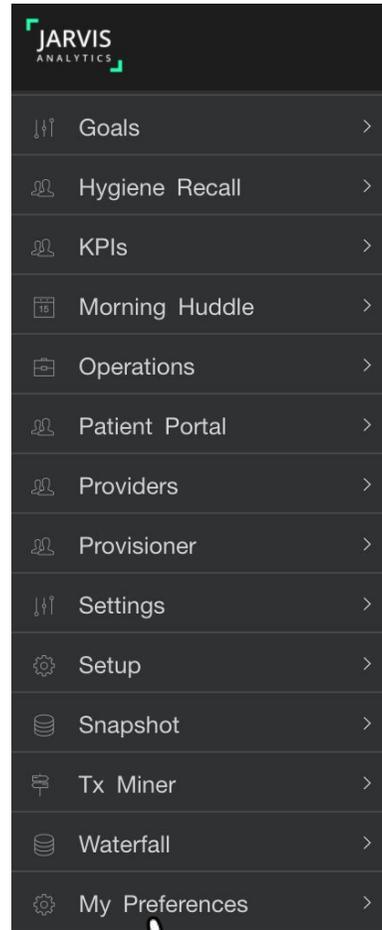
Don't have Google Chrome yet? Download it here.



2 CHANGING YOUR PASSWORD

You can change your password at any time.

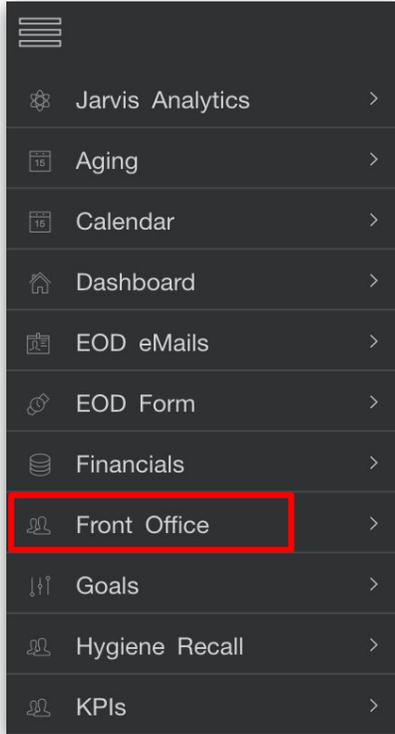
1. On the left side of the screen, click on "**My Preferences**". If you don't see My Preference, click on the  icon.
2. Your profile will populate. Here, you can update your account information including you password.
3. Change your Password by clicking the "**Generate Password**" button.
4. Press "**Enter**"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



3 NAVIGATION

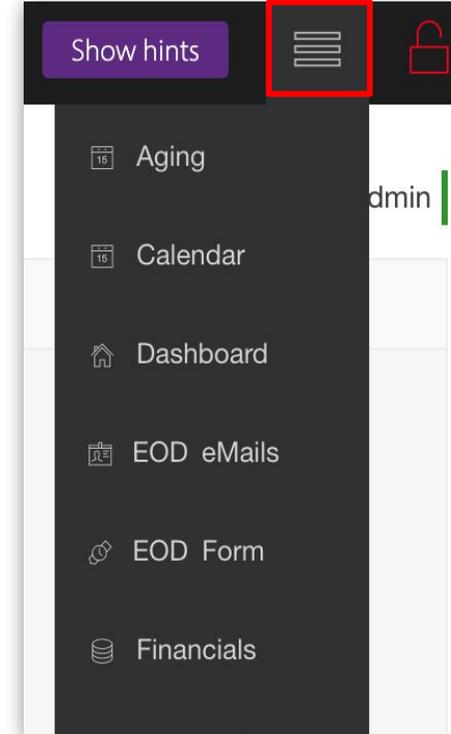
3.1

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



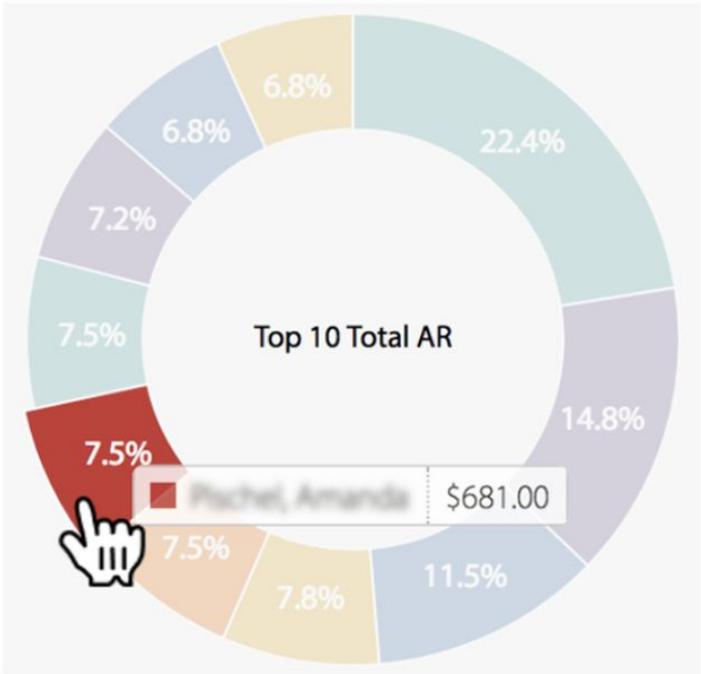
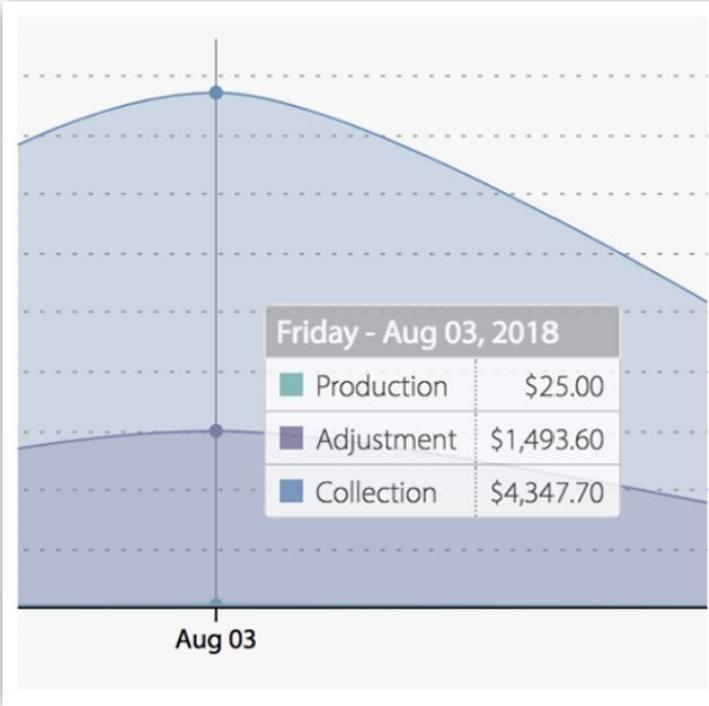
3.2

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



4

GRAPHS

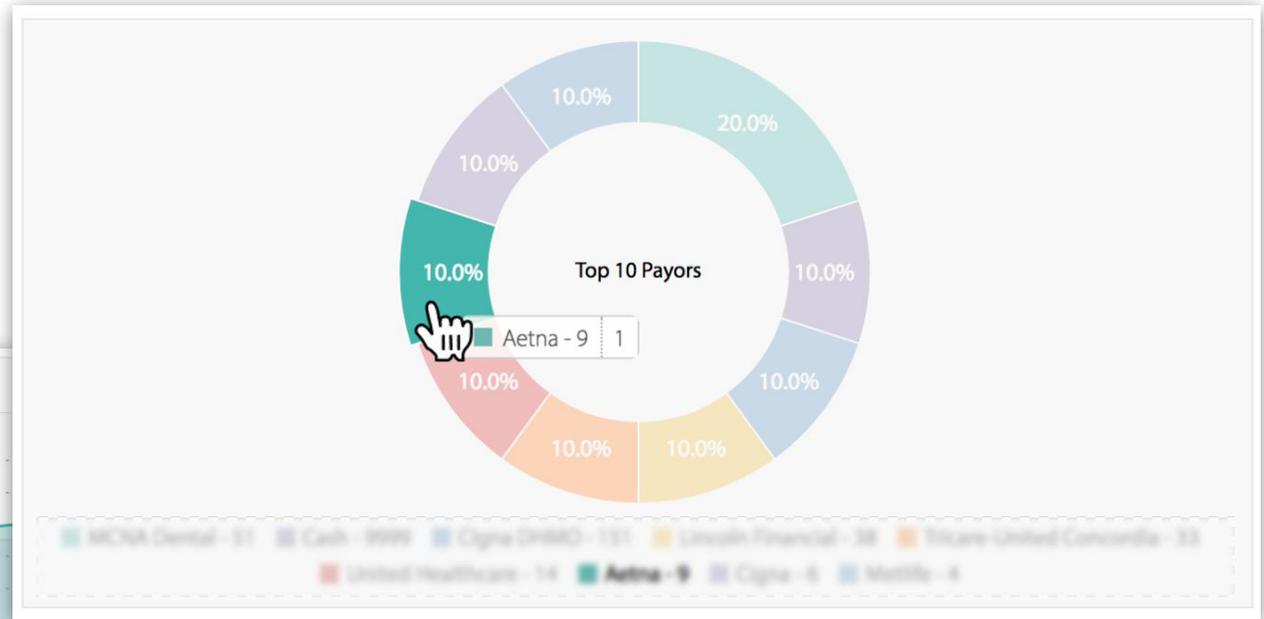
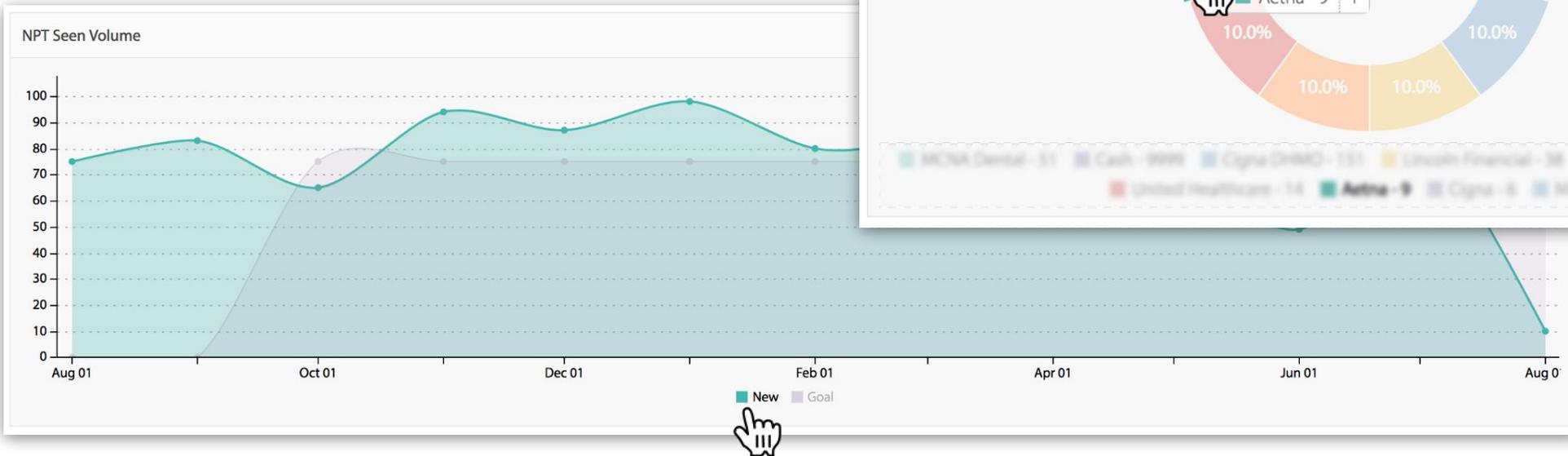


Hover over graphs to see detailed information.

4

GRAPHS

Click on the graph legend to highlight the data that corresponds to it.



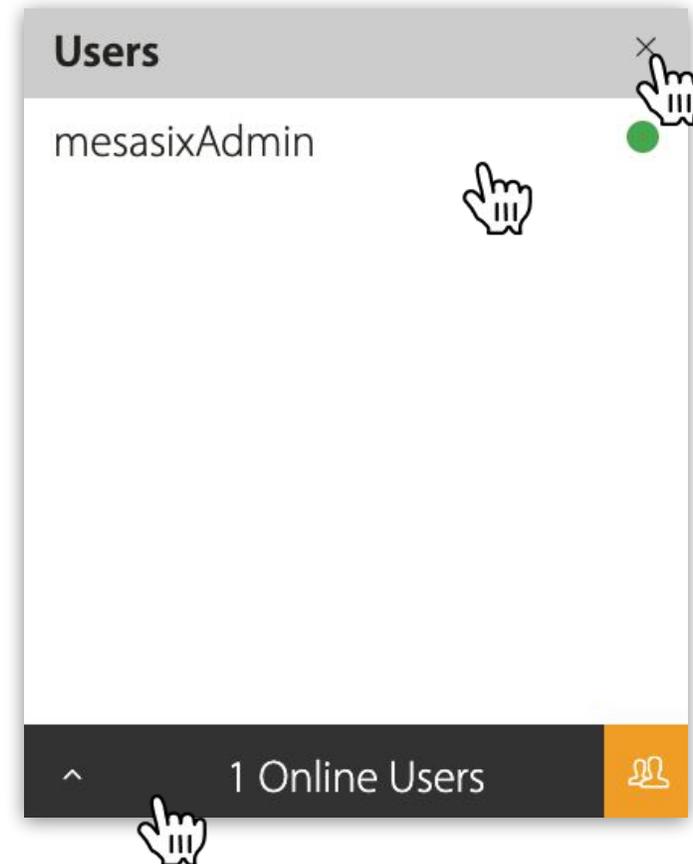
5 ONLINE USERS



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.



6 CONNECTOR STATUS



Click "**Search**" to see all connectors

- Connector is online and data is syncing
- Connector is offline and data is not syncing

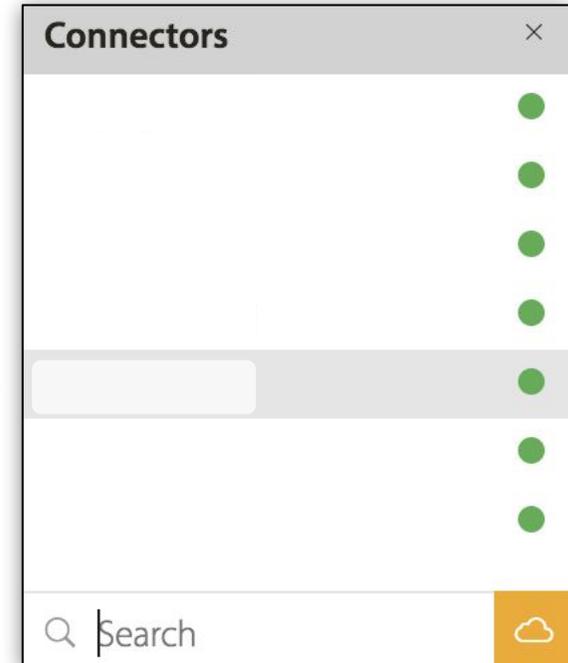
If a Connector is offline:

1. *Check network connection*
2. *Check that connector is running*

The Connector will disconnect if:

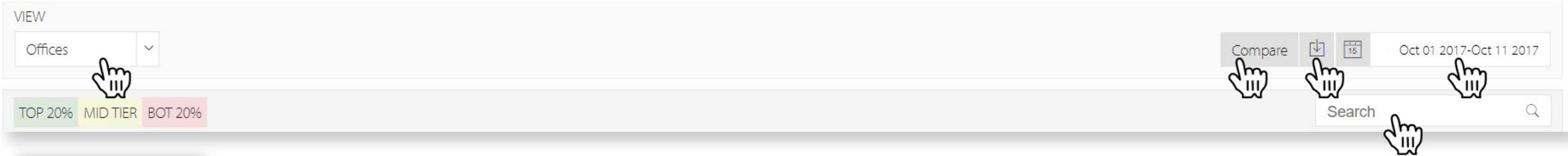
1. *PMS upgrade has taken place*
2. *I.P. address has changed*

Please contact support@jarvisanalytics.com call 866-9-JARVIS (866-952-7847) to request help with re-starting or re-configuring the connector.



8

OTHER BASIC FUNCTIONALITIES



- Cancellations
- Claims
- Compliance
- Marketing
- ✓ Offices
- Payors
- Performance
- Providers
- Services
- Score Cards
- Trends

View operations by Cancellations, Claims, Compliance, Marketing, Offices, Payors, Performance, Providers, Services, ,Score Cards, or Trends.

-  Indicates an increase
-  Indicates a decrease



Export the data into CSV by clicking this green download button.

- Diff Last Yr.
- % Diff Last Yr.
- Diff Vs. Goals

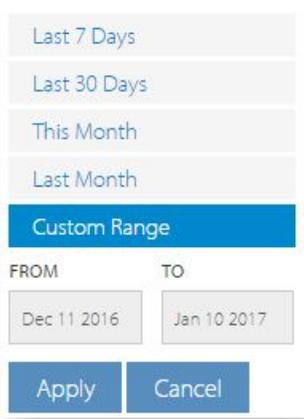
Compare the data from the previous year.

- Diff Last Year
- % Diff Last Yr.
- Diff vs. Goals

- Download CSV
- Download PDF
- Download PNG

You are able to download the report in the following formats:

1. CSV
2. PDF
3. PNG



Sort data displayed by date.

To search for data, enter any words that you think matches your desired result.

9

MODULE LIST

Dashboard Module List

All locations you have access to

DEMO Dental Dashboard

✂ My Modules

- Accounts
- Call Leads
- Dashboard
- EOD eMails
- EOD Form
- EOD Form V2
- EOM Form
- Financials
- Form Leads
- Front Office
- Goals
- Hygiene Recall
- KPIs new
- Leads Report V2
- Morning Huddle
- Operations Demo
- Patient Man

📖 My Locations (12)

- Apple
- Auburn
- Bluetooth Dental
- Dental Floss
- Dental Haven
- eTeeth
- Flouride
- FreshBreath
- Good Year
- Happy Tooth
- Jarvis
- Washington

📘 User Guides and Manuals

- Dashboard Manual PDF
- Definitions PDF

Available user guides, manuals and contact information.

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.

The screenshot shows the Jarvis Reservations interface. At the top, there's a header with 'Hello, Charlene', 'LEDGER', and 'RESERVATION'. Below that, there are filters for 'LOCATION' (Apple) and 'View Type' (Jarvis). The main area is a calendar for March 2020, showing events plotted on a grid. To the right, a 'Reservations Today' table lists events for the current day, including details like ID, Title, and Start time.

#	TITLE	START
1	Guigowski, Jairo	08:00 am
2	Hartmann, Tracy	08:00 am
3	Doyle, Shary	08:00 am
4	Sawayn, Carol	09:00 am
5	Lowe, Teagan	09:00 am
6	Herman, Kip	09:30 am
7	Rice, Gordon	10:00 am
8	Herman, Kip	10:00 am
9	Herman, Kip	11:00 am
10	Brekke, Jariya	01:00 pm
11	Spes, Mara	01:30 pm
12	Hagenes, Brody	02:00 pm
13	Harris, Dayton	02:00 pm
14	Glover, Rebekah	02:30 pm
15	Glover, Rebekah	02:30 pm
16	Sauer, Waylon	03:00 pm
17	Orn, Jean	03:00 pm
18	Quigley, Broderick	04:30 pm

 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.

DEMO Reservations

Hello, Charlene | LEEDGER 100.00%
RESERVATION 100.01%
Last data sync: 2020-03-11 09:56 AM

Reservations

LOCATION: Apple | View type: ES Calendar - Month

March 2020 03:08 pm

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
	1	2	3	4	5	6	7	
Closed		21 Appts New Patients: 4 Sched: \$5,365.93 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$5,326.02 %Prod: % (Pending)	6 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	23 Appts New Patients: 3 Sched: \$8,385.04 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$8,385.04 %Prod: % (Pending)	31 Appts New Patients: 0 Sched: \$5,836.9 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$5,549.6 %Prod: % (Pending)	19 Appts New Patients: 6 Sched: \$3,929.14 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$3,929.14 %Prod: % (Pending)	
	8	9	10	11	12	13	14	
Closed		29 Appts New Patients: 1 Sched: \$10,597.26 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,636.75 %Prod: % (Pending)	6 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	23 Appts New Patients: 2 Sched: \$3,152.76 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,985.76 %Prod: % (Pending)	6 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	12 Appts New Patients: 3 Sched: \$491.5 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$521 %Prod: % (Pending)	
	15	16	17	18	19	20	21	
Closed		10 Appts New Patients: 1 Sched: \$2,307 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,288 %Prod: % (Pending)	17 Appts New Patients: 3 Sched: \$9,261 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$9,332 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	18 Appts New Patients: 0 Sched: \$8,517.82 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$8,656.08 %Prod: % (Pending)	35 Appts New Patients: 2 Sched: \$5,063.25 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$4,996.25 %Prod: % (Pending)	32 Appts New Patients: 1 Sched: \$9,734.52 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$9,914.16 %Prod: % (Pending)	
	22	23	24	25	26	27	28	
Closed		27 Appts New Patients: 2 Sched: \$10,337 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,798 %Prod: % (Pending)	20 Appts New Patients: 4 Sched: \$10,464 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,624 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	17 Appts New Patients: 3 Sched: \$2,950.66 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,533.44 %Prod: % (Pending)	19 Appts New Patients: 2 Sched: \$3,666.2 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$3,666.2 %Prod: % (Pending)	20 Appts New Patients: 0 Sched: \$3,019.21 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$201.03 %Prod: % (Pending)	
	29	30	31	1	2	3	4	
Closed		15 Appts New Patients: 0 Sched: \$3,459 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	9 Appts New Patients: 0 Sched: \$396 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	0 Appts New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	Closed	
Monthly Totals for - March 2020				Selected Range Totals				
Scheduled Amount: \$130,823.4 Month Goal: Pending % of Goal: Pending				New Patients: 46 Reservations: 521 *Production: \$120,585.39		Scheduled Amount: \$ Selected Goal: Pending % of Goal: Pending		New Patients: select one Reservations: select one *Production: \$

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

Reservations

LOCATION: Apple View Type: ES Calendar - Month

March 2020 03:08 pm

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	21 Appts	6 Appts	0 Appts	27 Appts	31 Appts	19 Appts
Closed	New Patients: 4 Sched: \$5,365.93 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$5,326.02 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 3 Sched: \$8,385.04 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$8,385.04 %Prod: % (Pending)	New Patients: 0 Sched: \$5,836.9 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$5,549.6 %Prod: % (Pending)	New Patients: 6 Sched: \$3,029.14 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$3,029.14 %Prod: % (Pending)
8	29 Appts	6 Appts	0 Appts	23 Appts	6 Appts	12 Appts
Closed	New Patients: 1 Sched: \$10,597.26 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,636.75 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 2 Sched: \$3,152.76 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,985.76 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 3 Sched: \$491.5 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$521 %Prod: % (Pending)
15	10 Appts	17 Appts	0 Appts	18 Appts	35 Appts	32 Appts
Closed	New Patients: 1 Sched: \$2,307 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,288 %Prod: % (Pending)	New Patients: 3 Sched: \$9,261 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$9,332 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$8,517.82 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$8,656.08 %Prod: % (Pending)	New Patients: 2 Sched: \$5,063.25 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$4,996.25 %Prod: % (Pending)	New Patients: 1 Sched: \$9,734.52 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$9,914.16 %Prod: % (Pending)
22	27 Appts	20 Appts	0 Appts	17 Appts	19 Appts	20 Appts
Closed	New Patients: 2 Sched: \$10,337 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,798 %Prod: % (Pending)	New Patients: 4 Sched: \$10,464 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$10,624 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 3 Sched: \$2,950.66 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,533.44 %Prod: % (Pending)	New Patients: 2 Sched: \$3,666.2 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$3,666.2 %Prod: % (Pending)	New Patients: 0 Sched: \$3,019.21 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$2,013 %Prod: % (Pending)
29	15 Appts	9 Appts	0 Appts	0 Appts	0 Appts	Closed
Closed	New Patients: 0 Sched: \$3,459 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$396 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	New Patients: 0 Sched: \$0 Goal: \$ (Pending) %Goal: % (Pending) Prod: \$0 %Prod: % (Pending)	Closed

Monthly Totals for - March 2020		Selected Range Totals	
Scheduled Amount: \$130,823.4	New Patients: 46	Scheduled Amount: \$	New Patients: select one
Month Goal: Pending	Reservations: 521	Selected Goal: Pending	Reservations: select one
% of Goal: Pending	*Production: \$120,585.39	% of Goal: Pending	*Production: \$

10

CALENDAR (Day)

DEMO Reservations

Reservations

LOCATION: Apple | View Type: ES Calendar - Day

Schedule for Friday, March 27, 2020 04:03 pm [Total: \$3,666.2 / \$3,666.2]

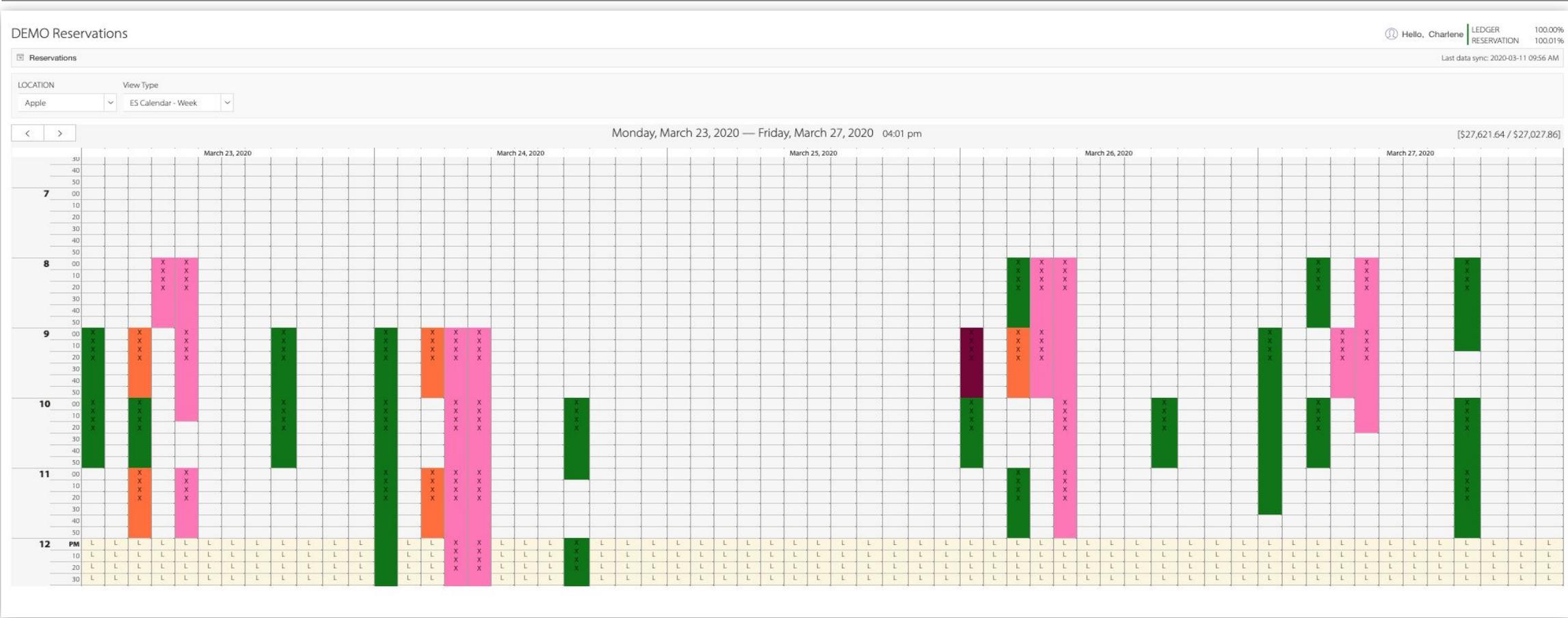
PRODUCTION/TA	NON PRODUCTION	NP/SRP	RECALL/PM	Prod/TA/Prov1
7:00				
8:00	X3000 Herlmann - Tracy		X5132.00 Gulgowski - Jairo	X5187.00 Doyle - Shary
9:00	X5108.00 Sawayn - Carol	X519.00 Lowe - Teagan	X120.297.7	X336-615-2
10:00	X3000 Rice - Gordon		X556-615-2	X530.00 Herman - Kip
11:00				X356-615-2
12:00	LUNCH	LUNCH	LUNCH	LUNCH

#	TITLE	START
1	Gulgowski, Jairo	08:00 am
2	Herlmann, Tracy	08:00 am
3	Doyle, Shary	08:00 am
4	Sawayn, Carol	09:00 am
5	Lowe, Teagan	09:00 am
6	Herman, Kip	09:30 am
7	Rice, Gordon	10:00 am
8	Herman, Kip	10:00 am
9	Herman, Kip	11:00 am
10	Brekke, Janiya	01:00 pm
11	Sipes, Mara	01:30 pm
12	Hagenes, Brody	02:00 pm
13	Harris, Dayton	02:00 pm
14	Glover, Rebekah	02:30 pm
15	Glover, Rebekah	02:30 pm
16	Sauer, Waylon	03:00 pm
17	Orn, Jean	03:00 pm
18	Quigley, Broderick	04:30 pm

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

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CALENDAR (Week)



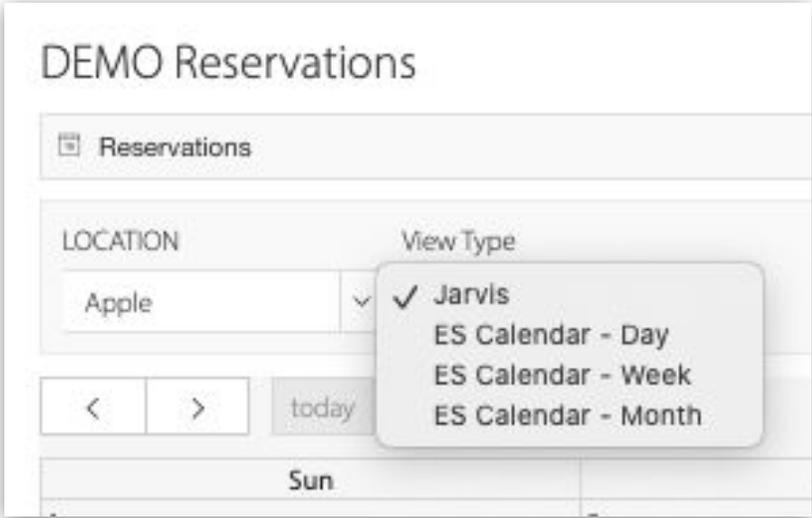
 The calendar displays your reservations for the selected week. Click on each event plotted to view more information.

10

CALENDAR

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

INFO PROVIDERS

RSVN. INFORMATION

Reservation Date	March 24,2020 09:00:00 AM
Operatory Title	HYGSP
Provider Name	Parekh, Sejal
Home Phone	
Reservation Reason	Periodontal Maintenance
Note	LM to r/s - SS

RESERVATION DETAILS

INFO PROVIDERS

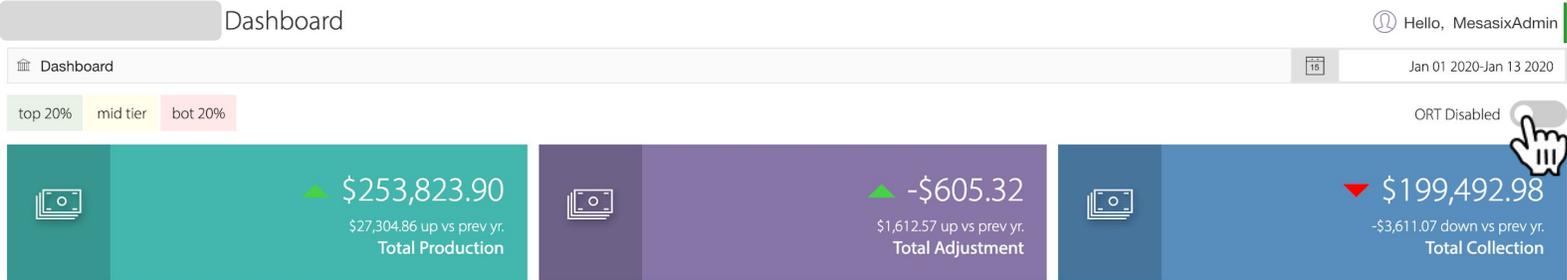
#	NAME	ID	START	END
1	Parekh, Sejal	174	2020-03-24T09:00:00	2020-03-24T10:00:00

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

The total production of all locations you have access to.

Total Adjustments

The total adjustments of all locations you have access to.

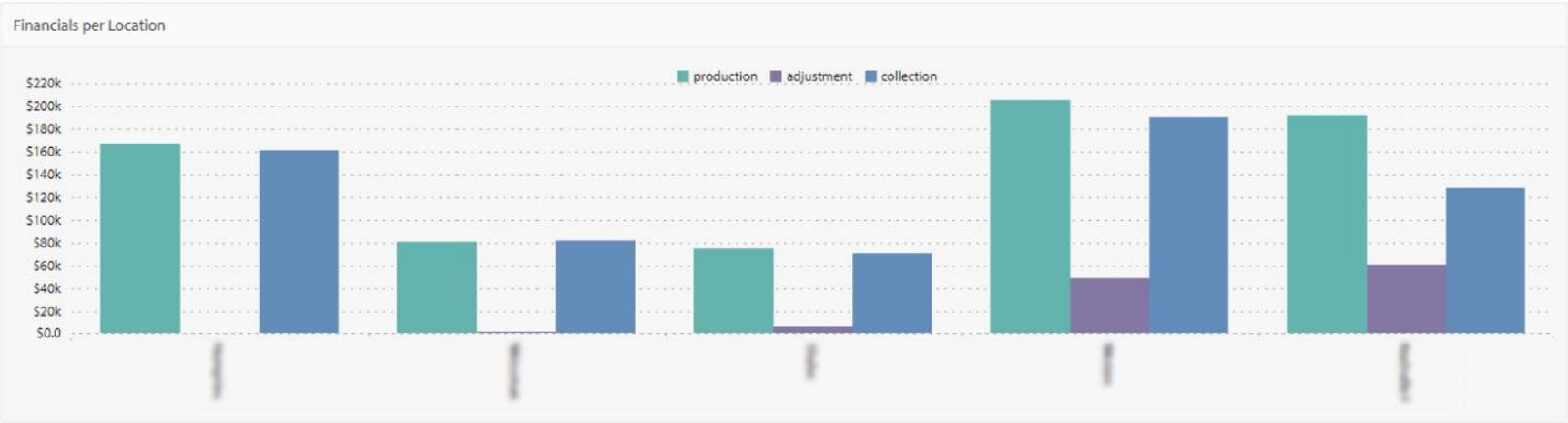
Total Collection

The total collection of all locations you have access to.

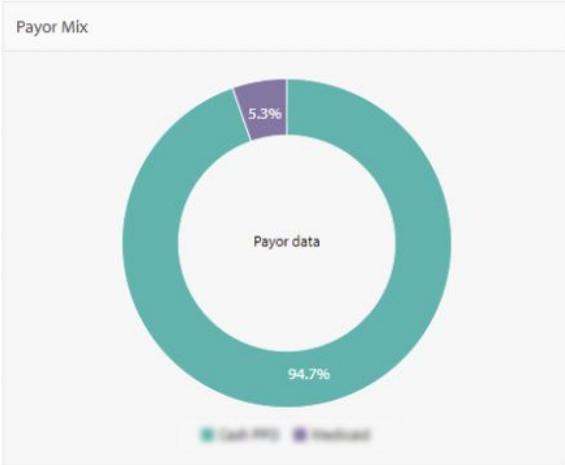
As you see in the titles, the figures are compared from last year's data with a row indicator showing if it went up or down.

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

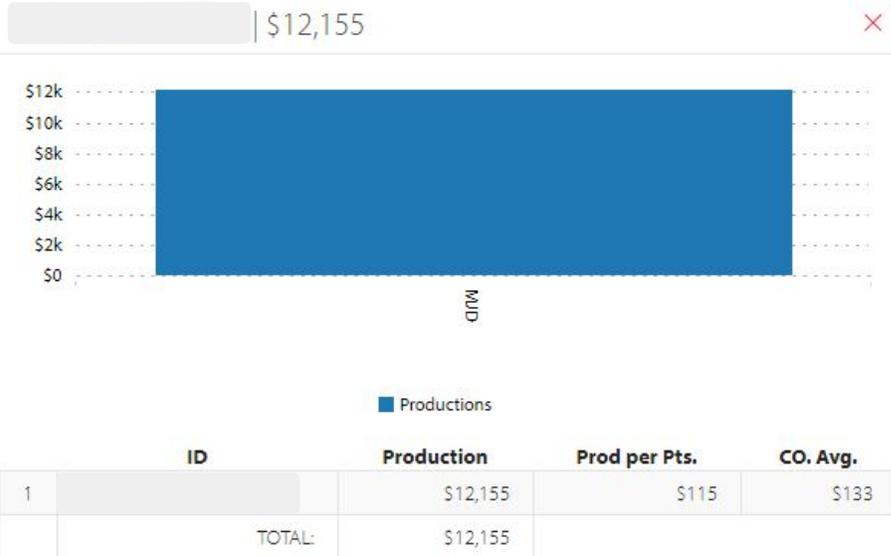
DASHBOARD

Avg Prod/Gst.		
#	LOCATION	PROD
1	Humphries	\$212.11
2	Nashville Family Dentistry	\$377.78
3	Shabo	\$290.66
4	Weissman	\$168.96
5	Vester	\$207.34

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

Provider: Search Providers			
#	PROVIDER	PROD	Info
1	Aiken, Robert	\$45.00	ⓘ
2	BATES, M-JESSICA	\$12,155.26	ⓘ
3	Bhatti, Lori	\$11,817.67	ⓘ
4	CARROLL, THOMAS R	\$15,562.00	ⓘ
5	Gastro-Oldham, Antonia	\$5,328.20	ⓘ
6	Chakote, Karunesh	\$13,743.00	ⓘ
7	DeShazo, Carla Grace	-\$10.00	ⓘ
8	EMPLOYEE, FILL IN	\$748.00	ⓘ
9	Etheridge, Ronda	\$14,290.00	ⓘ

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

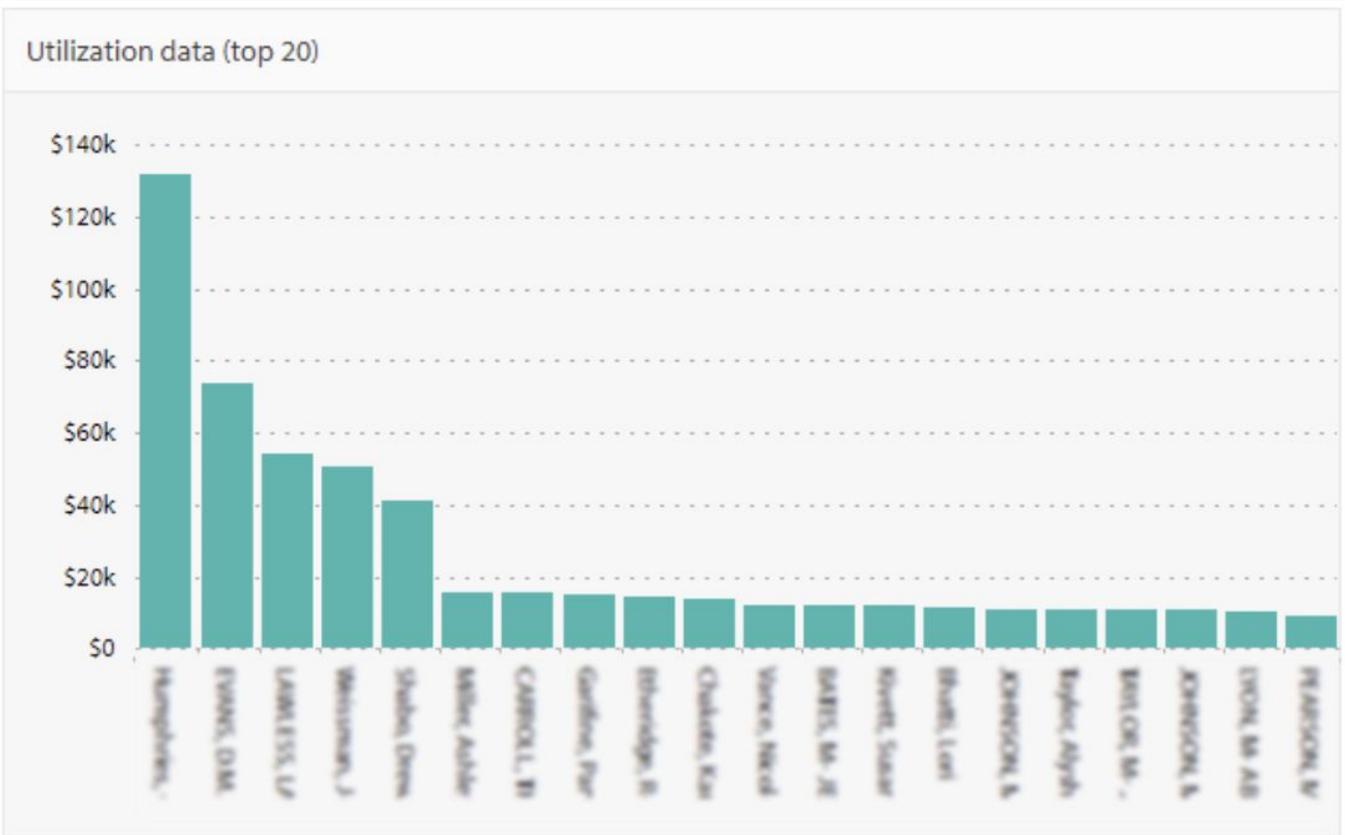


When you click in the info icon, this window will appear with a more detailed report regarding the provider you selected.

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

11

DASHBOARD



Utilization data displays the top 20 providers and their production per location.



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

12 FINANCIALS

- 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

▲ Indicates an increase
▼ Indicates a decrease

12

FINANCIALS



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.

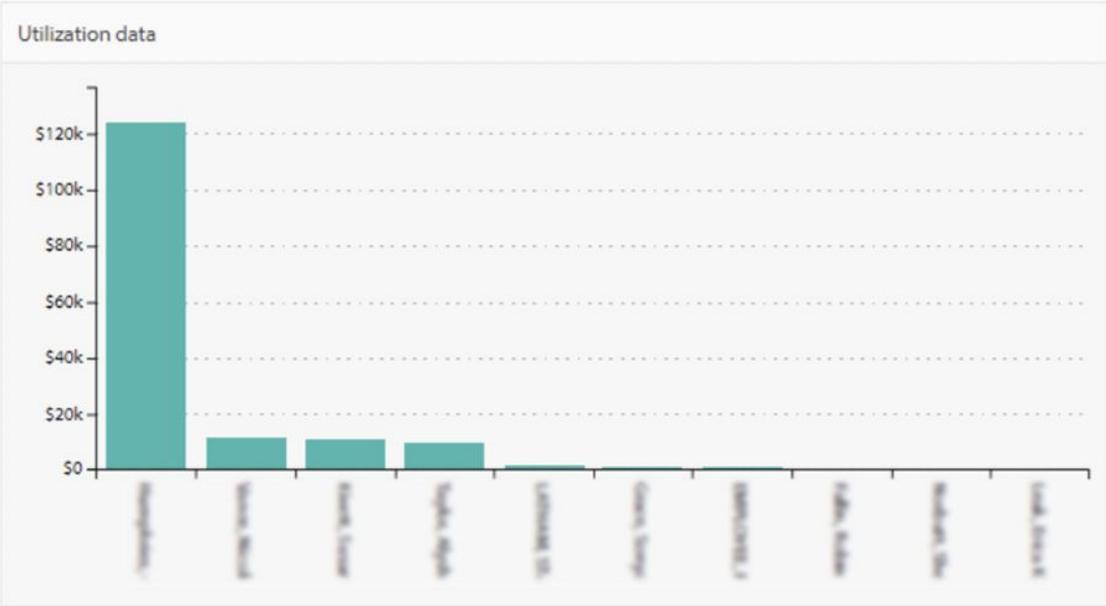
LOCATION: Mumpres ALL REPORT: Summary Aug 01 2019-Aug 28 2019

TOP 20% MID TIER BOT 20% Search

#	LOCATION	PROD	COLL	ADJU	GST. SEEN	NGST. SEEN	GST. SCHED	NGST. SCHED	AVG PROD/GST
1	Mumpres	\$170,534	\$161,526	-\$953	804	75	1,140	37	\$212
2	Traskville Family Dentistry	\$192,667	\$127,724	-\$60,510	510	31	653	8	\$378
3	Shelco	\$74,699	\$70,911	-\$6,232	257	18	307	3	\$291
4	Wesman	\$80,592	\$81,853	-\$1,678	477	26	543	3	\$169
5	Weslan	\$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

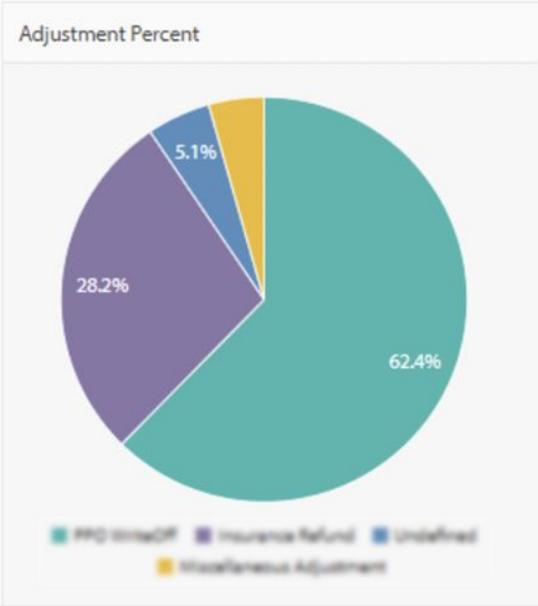
12

FINANCIALS



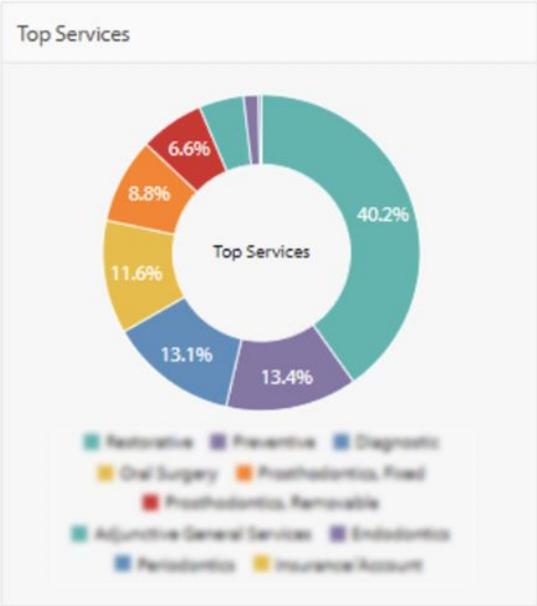
Utilization data

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



Adjustment Percent

Shows the top 5 adjustment types by percentage.



Top Service

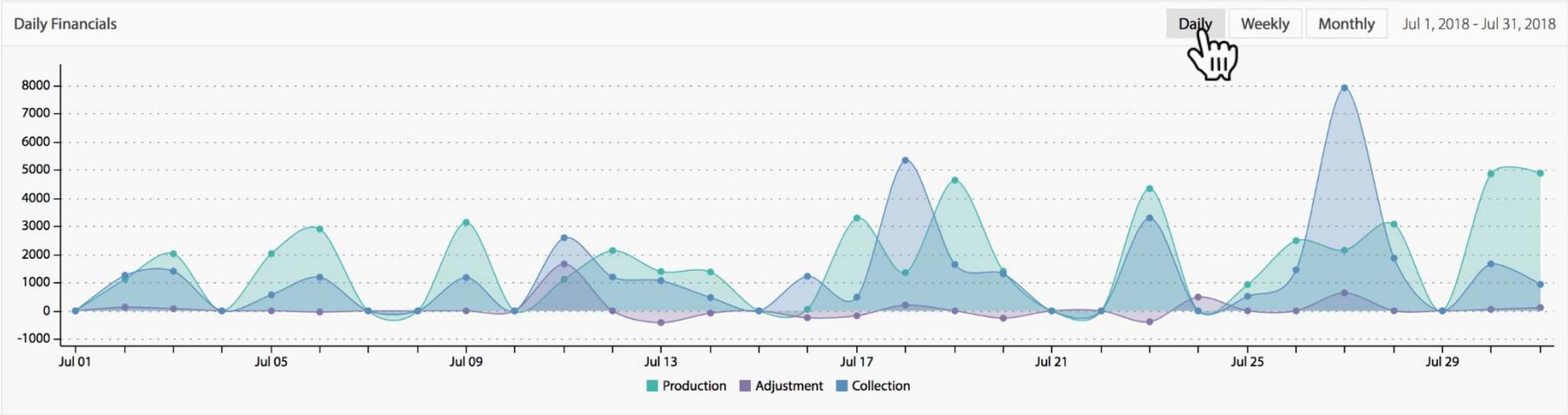
Shows the top 10 services by percentage.

12

FINANCIALS

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.

Hygiene Recall ADVANCED FILTER

BRAND: All | REGION: All | LOCATION: Humpres

Aug 01 2019-Aug 28 2019

Search

#	PROVIDER	OFFICE	ID	PATIENTS MISSED	PATIENTS RECALLED	PATIENTS RECALLED \$	PATIENT RECALL RATE %	
1	Humphres, Carl	Humpres	1	37	327	\$50,457.20	91%	 
2	Grass, Sonya R	Humpres	2	8	5	\$394.00	38%	 
3	Taylor, Alyssa	Humpres	AS	86	26	\$1,857.60	23%	 
4	EMERSON, ALLI N	Humpres	FI	8	1	\$75.00	11%	 
5	Yarock, Nicole	Humpres	NAV	43	113	\$9,941.25	72%	 
6	Kivett, Susan	Humpres	SK	118	21	\$1,337.10	15%	 
7	LATHAM, STACY	Humpres	SL	18	0	\$0.00	0%	 
8	Harbutt, Sheri	Humpres	SN	1	1	\$88.00	50%	 
						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.

Hygiene Recall ADVANCED FILTER

BRAND: All | REGION: All | LOCATION: Humpries | Date: Aug 01 2019-Aug 28 2019

PATIENT RECALLED: Gracia, Sonya R. | Humpries | 2019-08-01 to 2019-08-28 [Back to Summary](#) Search

#	PATIENT NAME	ID	PRI. REM. BEN.	SEC. REM. BEN.	AGE	HYGIENE PRODUCTION	PATIENTS RECALLED \$	LAST HYGIENE VISIT	NEXT VISIT	STATUS
1	Carter, Robert	1046	\$0.00	\$0.00	86	\$43.00	\$83.00	2019-08-07	2020-02-24	Active
2	Hanes, 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	Hornady, 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: All | REGION: All | LOCATION: Humpries | Date: Aug 01 2019-Aug 28 2019

PATIENT MISSED | Grace, Sonya R. | Humpries | 2019-08-01 to 2019-08-28 | [Back to Summary](#) | Search

<input type="checkbox"/>	<u>PATIENT NAME</u>	<u>ID</u>	<u>PRI. REM. BEN.</u>	<u>SEC. REM. BEN.</u>	<u>AGE</u>	<u>HYGIENE PRODUCTION</u>	<u>LAST HYGIENE VISIT</u>	<u>STATUS</u>
<input type="checkbox"/>	Lackey, Parise	10377	\$684.00	\$0.00	48	\$54.00	2019-08-22	Active
<input type="checkbox"/>	Ponce, Enrique	10782	\$7,499.00	\$0.00	18	\$74.00	2019-08-26	Active
<input type="checkbox"/>	Malone, Sonya	1396	\$263.80	\$0.00	45	\$12.00	2019-08-27	Active
<input type="checkbox"/>	Ponce, Yarely	14339	\$9,114.00	\$0.00	9	\$49.00	2019-08-08	Active
<input type="checkbox"/>	Gomes, Makool	14785	\$727.20	\$0.00	39	\$65.00	2019-08-22	Active
<input type="checkbox"/>	Aldredge, Aali	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.

Hygiene Recall ADVANCED FILTER

BRAND: All | REGION: All | LOCATION: Humpries | Date: Aug 01 2019-Aug 28 2019

PATIENT MISSED Grace, Sonya R Humpries 2019-08-01 to 2019-08-28 CREATE REMINDERS (2) Back to Summary

	PATIENT NAME	ID	PRI. RECALL	SEC. REM. BEN.	AGE	HYGIENE PRODUCTION	LAST HYGIENE VISIT	STATUS
<input checked="" type="checkbox"/>	Lackey, Franke	10377	\$684.00	\$0.00	48	\$54.00	2019-08-22	Active
<input type="checkbox"/>	Ponce, Enrique	10782	\$7,499.00	\$0.00	18	\$74.00	2019-08-26	Active
<input checked="" type="checkbox"/>	Makone, Sonya	1396	\$263.80	\$0.00	45	\$12.00	2019-08-27	Active
<input type="checkbox"/>	Ponce, Yarely	14339	\$9,114.00	\$0.00	9	\$49.00	2019-08-08	Active
<input type="checkbox"/>	Gomes, Makool	14785	\$727.20	\$0.00	39	\$65.00	2019-08-22	Active
<input type="checkbox"/>	Kilbridge, Neil	14806	\$1,282.00	\$0.00	7	\$169.00	2019-08-01	Active
<input type="checkbox"/>	Smith, Jennifer	15884	\$1,349.00	\$0.00	32	\$97.00	2019-08-01	Active
<input type="checkbox"/>	Gaunt, Phyllis	17005	\$0.00	\$0.00	66	\$52.00	2019-08-15	Active
<input type="checkbox"/>	Cash, William	70	\$1,102.00	\$0.00	62	\$54.00	2019-08-19	Active

ADD REMINDER (3) ✕

Reminder Date:

Assigned To:

Rodzainna Hamisain Steven

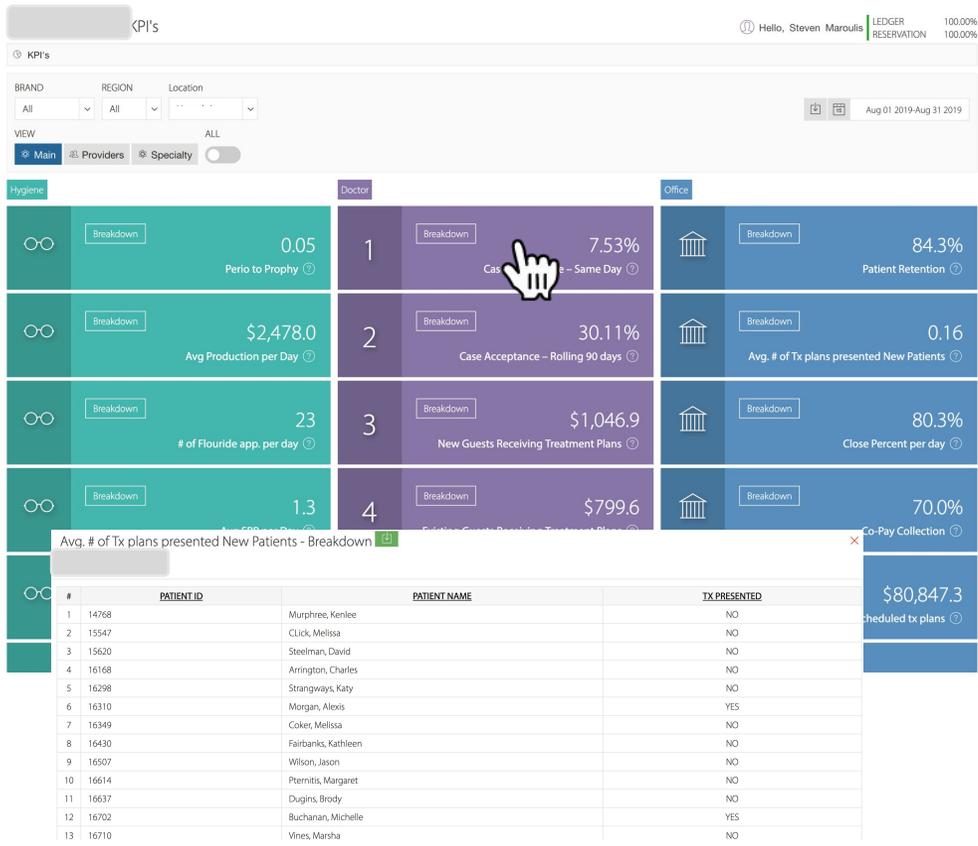
Please select a personnel.



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.

14

KPI (Main View)



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.

DOCTOR - KPI'S

#	LOCATION	1. CASE ACCEPT - SAME DAY	2. CASE ACCEPT - ROLL 90 DAYS	3. NGST. RECEIVING TX PL.	4. EXL GST RECEIVING TX PL.	5. AVG. TIME/DOC. APPT (minutes)	6. AVG. DOC. PROD/HR	7. AVG. DOC. PROD/APPT.	8. SAME DAY TX/NG	9. MOLAR ENDO PROC.	10. INVISALIGN PROC.	11. 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		7.53%	30.11%	\$1,046.9	\$799.6	62	\$1,119.0	\$317.03	\$242.49	0	0	8
2		0.00%	44.44%	\$0.0	\$1,242.8	43	\$419.1	\$143.71	\$390.37	0	0	0
3		0.96%	31.73%	\$2,282.4	\$1,512.3	9	\$472.3	\$270.25	\$239.60	0	0	4
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 Hello, MesasixAdmin | LEDGER 100.00%
RESERVATION 100.00%

BRAND: All | REGION: All | Location: [dropdown] | Date: Aug 01 2019-Aug 31 2019

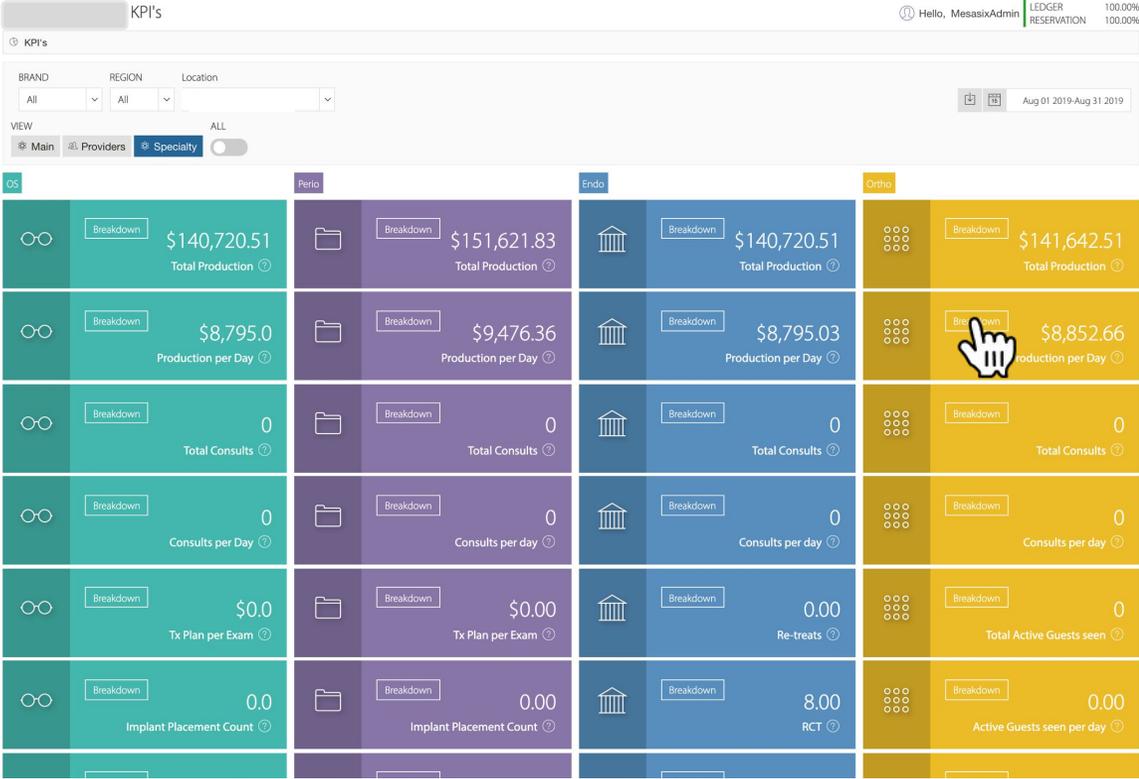
VIEW: Main | **Providers** | Specialty | ALL

KPI'S BY PROVIDER Search [input]

#	PROVIDER	ID	LOCATION	1. CASE ACCEPT. - SAME DAY	2. CASE ACCEPT. - ROLL 90 DAYS	3. NGST. RECEIVING TX PL.	4. EXI. GST RECEIVING TX PL.	5. AVG. TIME/DOC APPT. (min)	6. AVG. DOC. PROD/HR	7. AVG. DOC. PROD/APPT.	8. SAME DAY TX/NG	9. MOLAR ENDO PROC.	11. 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%	\$0.0	\$0.0	33	\$11.7	\$63.50	\$89.00	0	0
2	arl	1		7.53%	30.11%	\$1,046.9	\$799.6	62	\$1,119.0	\$317.03	\$242.49	0	8
3		5		0.00%	0.00%	\$0.0	\$0.0	0	\$3.8	\$0.00	\$0.00	0	0
4		AS		0.00%	0.00%	\$0.0	\$0.0	48	\$95.6	\$84.19	\$199.57	0	0
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.

Production per Day - Breakdown

Office: Humpries
Brand: Marquee

#	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 Hello, MesasixAdmin | LEDGER 100.00%
RESERVATION 100.00%

KPI's ADVANCED FILTER

BRAND: All | REGION: All | Location: [dropdown]

VIEW: Main | Providers | **Specialty** ALL | METRIC: **OS** (dropdown)

OS - KPI'S Search [input]

#	LOCATION	TOTAL PROD.	AVG. PRO. PER DAY	TOTAL CONSULTS	CONSULTS PER DAY	TX PLAN / EXAM	IMPLANT PLACEMENT #	IMPLANT PLACEMENT \$	SEDATION PROD.	EXTRACTION PROD.
TOTALS:		\$140,720.5		0			0.0	\$0.0	\$1,880.0	\$15,156.0
1	Humpries	\$140,720.5	\$8,795	0	0	\$0	0	\$0	\$1,880	\$15,156
TOTALS:		\$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
Hello, Mesasix

LEDGER 100.00%
 RESERVATION 99.83%

KPI's
ADVANCED FILTER

BRAND
All

REGION
All

Location

Jul 01 2019-Jul 27 2019

VIEW
 Main Providers Specialty **Specialty Providers**

ALL

OS
 Perio
 Endo
 ✓ Ortho ✓

ORTHO - KPI'S BY PROVIDER

#	PROVIDER	TOTAL PRODUCTION	PRODUCTION PER DAY	TOTAL CONSULTS	CONSULTS PER DAY	TOTAL ACTIVE GUEST SEEN	ACTIVE GUEST SEEN / DAY	APPLIANCES	PHASE 1	COMPREHENSIVE STARTS	DEBONDS	CONVERSION
1		\$2,500.0	\$2,500.0	1	1	2	2	0	0	1	0	1.00

15

OPERATIONS (Overview)

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

#	LOCATION	BY OFFICE					PER WORKING DAY		PER GUEST VISITS		
		COLL	GST. VISITS	NGST. VISITS	ACT. GST W/RSVN	RETENTION	GST. VISITS	NGST. VISITS	COLL	PR	
1	Humphries	\$180,514	\$169,706	901	39	87%	77%	56	2		
2		\$95,938	\$92,514	484	24	90%	84%	25	1		
3		\$203,891	\$227,107	1,174	30	92%	85%	42	1		
AVERAGE:		\$160,114	\$163,109	853	31			41	1	\$7,624	\$7,767
TOTAL:		\$480,343	\$489,327	2,559	93			123	4	\$23,613	\$23,587

- 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

		VIEW	BRAND	REGION											
		Offices	All	All	Compare [Download] [Calendar] Jul 01 2019-Jul 27 2019										
		TOP 20% MID TIER BOT 20%			Search [Magnifying Glass]										
#	LOCATION	BY OFFICE										PER WORKING DAY			
		PROD	COLL	GST. VISITS	NGST. VISITS	MKTG NGST.	NGST. LEADS	NGST. UNFILTERED	ACT GST W/RSVN	RETENTION	GST. VISITS	NGST. VISITS	PROD	COLL	
1	Apple	\$87,948	\$57,910	271	61	0	0	70	72%	44%	17	4	\$5,497	\$3,458	
2	Auburn	\$101,722	\$107,696	428	63	0	0	83	77%	47%	21	3	\$5,086	\$3,458	
3	Burnsville Dental	\$95,741	\$75,482	378	76	0	0	79	73%	54%	20	4	\$5,039	\$3,458	
4	Dental First	\$52,522	\$44,364	246	42	0	0	46	77%	44%	13	2	\$2,764	\$3,458	
5	Dental Haven	\$46,384	\$26,857	142	29	0	0	31	74%	36%	11	2	\$3,568	\$3,458	
6	Elmhurst	\$75,782	\$66,504	297	53	0	0	57	78%	60%	17	3	\$4,458	\$3,458	
7	Flourde	\$101,070	\$79,789	351	54	0	0	68	77%	57%	18	3	\$5,053	\$3,458	
8	First Street	\$49,375	\$37,703	165	56	0	0	57	63%	20%	10	3	\$2,904	\$3,458	
9	Good Year	\$59,585	\$44,239	243	70	0	0	74	65%	22%	13	4	\$3,136	\$3,458	
10	Happy Tooth	\$84,541	\$75,614	263	53	0	0	63	72%	38%	15	3	\$4,973	\$3,458	
11	Jarvis	\$46,431	\$44,071	198	72	0	0	74	57%	10%	12	4	\$2,731	\$3,458	
12	Washington	\$58,391	\$52,579	236	67	0	0	73	63%	16%	14	4	\$3,435	\$3,458	
AVERAGE:		\$71,624	\$59,401	268	58	0	0	65			15	3	\$4,073	\$3,458	
TOTAL:		\$859,492	\$712,810	3,218	696	0	0	775			181	39	\$48,645	\$3,458	

15

OPERATIONS (Trends)

VIEW: Trends | BRAND: All | REGION: All | Column: BYO Production

BYO - By Office

Aug 2019

- ✓ BYO Production
- BYO Collection
- BYO Gst Visits
- BYO Nsgt Visits
- BYO Active Gst
- PWD Production
- PWD Collection
- PWD Gst Visits
- PWD Nsgt Visits
- PPV Production
- PPV Collection
- PPV Procedures
- PP Production
- PP Collection

The **Trends Report** displays the trailing 12 months reports:

- **BYO Production** - Production of each of the locations
- **BYO Collection** - Collection of each of the locations.
- **BYO Gst Visits** - Guest visits of each of the locations.
- **BYO Nsgt Visits** - New guest visits of each of the locations.
- **BYO Active Gst** - Active guests of each of the locations.
- **PWD Production** - Per working day production of each of the locations.
- **PWD Collection** - Per working day collection of each of the locations.
- **PWD Gst Visits** - Per working day guest visits of each of the locations.
- **PWD Nsgt Visits** - Per working day new guests visits of each of the locations.
- **PPV Production** - Per guest visits production of each of the locations.
- **PPV Collection** - Per guest visits collection of each of the locations.
- **PPV Procedures** - Per guest visits procedures of each of the locations.
- **PP Production** - Per procedure production of each of the locations.
- **PP Collection** - Per procedure collection of each of the locations.

- 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 (Providers)

VIEW		BRAND		REGION		LOCATION								
Providers		All		All		All		Compare		Aug 01 2019-Aug 31 2019				
		BY PROVIDER				PER WORKING DAY				PER GUEST VISITS			PER PROCEDURE	
#	PROVIDER	PROD	COLL	GST. VISITS	NGST. VISITS	GST. VISITS	NGST. VISITS	PROD	COLL	PROD	COLL	PROC	PROD	COLL
1	BATES, M - JESSICA - MID	\$12,117	\$14,674	129	1	6	0	\$551	\$667	\$94	\$114	2	\$52	\$64
2	Blair, Lori - LB	\$13,051	\$11,045	131	4	8	0	\$768	\$650	\$100	\$84	2	\$41	\$35
3	BOWEN, LARGAL - AGB	-\$324	\$21	0	0	0	0	\$0	\$0	\$0	\$0	0	\$0	\$0
4	Carroll, Thomas F - TTC	-\$52	\$0	0	0	0	0	\$0	\$0	\$0	\$0	0	\$0	\$0
5	CARROLL, THOMAS F - TTC	\$13,465	\$19,027	88	2	7	0	\$1,036	\$1,464	\$153	\$216	1	\$106	\$150

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

- BY Provider Production** – Production of providers on the selected office and date range.
- BY Provider Collection** – Collection of providers on the selected office and date range.
- BY Provider Gst Visits** – Guest visits of providers on the selected office and date range.
- BY Provider NGST Visits** – New guest visits of providers on the selected office and date range.
- BY Provider Active Gst** – Monthly active guests of each of the locations.
- PWD Gst Visits** – Provider's per working day guest visits on the selected office and date range.
- PWD NGST Visits** – Provider's per working day new guest visits on the selected office and date range.
- PWD Production** – Provider's per working day production on the selected office and date range.
- PWD Collection** – Provider's per working day collection on the selected office and date range.
- PPV Production** – Provider's per guest visit production on the selected office and date range.
- PPV Collection** – Provider's per guest visit collection on the selected office and date range.
- PPV Procedures** – Provider's per guest visit procedures on the selected office and date range.
- PP Production** – Provider's per procedure production on the selected office and date range.
- PP Collection** – Provider's per procedure collection on the selected office and date range.

- 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)

VIEW		BRAND		REGION		LOCATION									
Compliance		All		All		All		Compare [Share] [Calendar] Jul 01 2019-Jul 31 2019							
		TOP 20%		MID TIER		BOT 20%		Search							
#	PROVIDER	LOCATION			PER WORKING DAY		PER GUEST VISITS						PER PROC		
			PROD	GST. VISITS	PROD	PROC	PROD	PROC	FILLINGS	CROWNS	EXT	PO	ROOT CANALS	PROD	
1	BARRELL, M- JESSICA - MID	Weslaco	\$14,502	137	\$580	10	\$106	2	0.000	0.000	0.000	0.000	0.000	0.000	\$56
2	Whitt, Lori - LB	Weslaco	\$8,597	116	\$409	13	\$74	2	0.000	0.000	0.000	0.000	0.000	0.000	\$32
3	Carroll, DMD, Thomas F - TTC	Weslaco	-\$45	0	-\$9	3	\$0	0	0.000	0.000	0.000	0.000	0.000	0.000	-\$3
4	CARROLL, THOMAS F - TTC	Weslaco	\$28,005	137	\$1,400	11	\$204	2	0.241	0.000	0.080	0.000	0.000	0.000	\$131
5	Castro-Ortiz, Antonio - ACD	Weslaco	\$7,401	107	\$411	11	\$69	2	0.000	0.000	0.000	0.000	0.000	0.000	\$36

The **Compliance Report** shows production, guests visits and complex operations of the providers.

- 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.

- 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)

VIEW		BRAND		REGION		LOCATION		Compare		Date Range			
Payors		All		All		All		[Compare]		Jul 01 2019-Jul 31 2019			
#	PAYOR	BY PAYOR						PER WORKING DAY			PER GUEST VISITS		PER PROC
		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	Wesloman	\$1,062	0%	7	0	7	0	\$1,062	\$1,062	14	\$531
3	AARP Medicare Complete	892	Humphries	\$497	0%	2	2	1	1	\$249	\$249	4	\$71
4	AAI	89	Humphries	\$2,571	0%	4	0	1	0	\$643	\$643	3	\$198

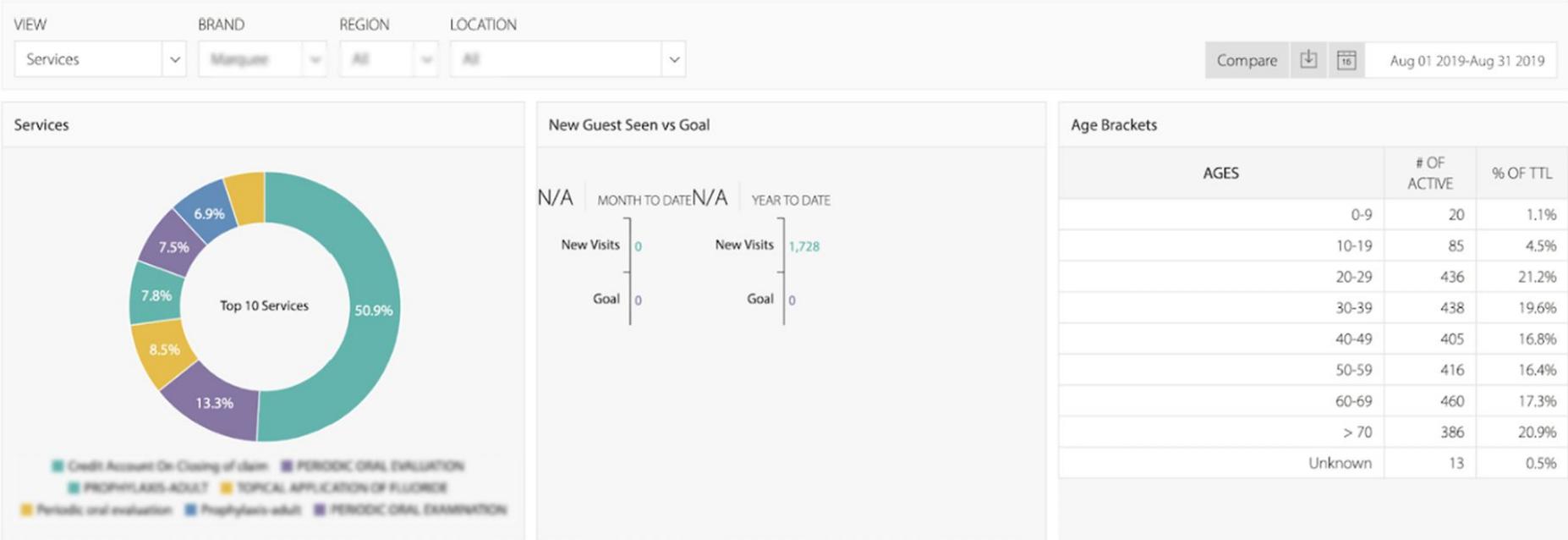
The **Payors Report** shows your production, collection, and new and existing guests visits grouped by payor, per working day, per guest visits, and procedure.

- 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.

- 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)



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)

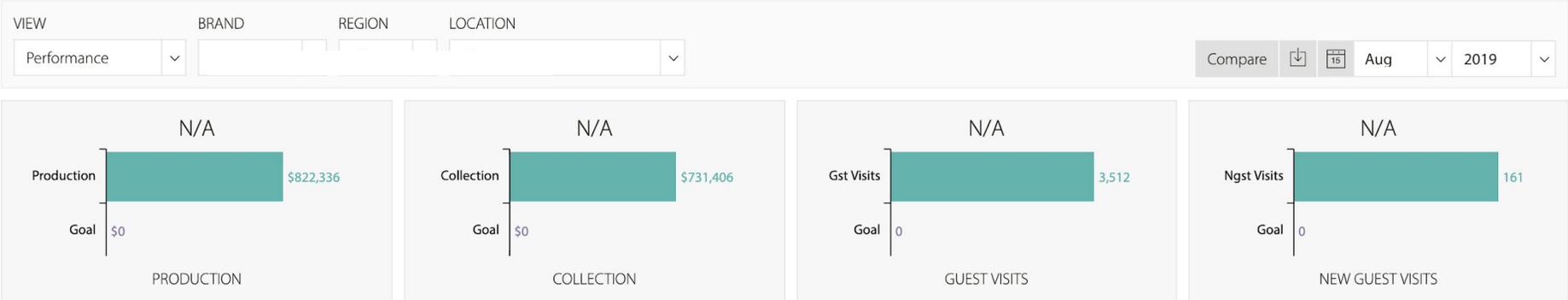
Displays the list of services with its count, total fee, and % of TTL on the selected office and date range and location. You can also use the Search Bar to search for the service name, code, type, count, total fee or % of TTL.

TOP 20% MID TIER BOT 20%			Search 			
#	SERVICES	CODE	TYPE	COUNT	TOTAL FEE	% OF TTL
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.



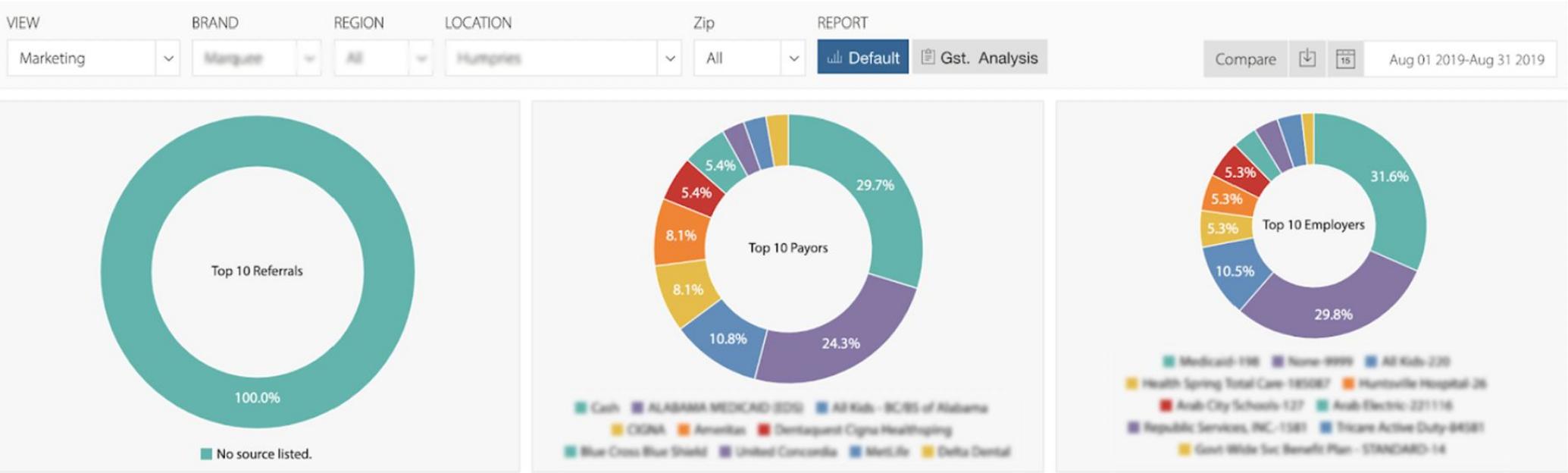
ACT – Actual
COLL – Collection
PROD – Production
GST VISITS – guest Visits
NGST VISITS – New guest Visits
NEW GST – New guests
ACT + PROD – Sum of the Actual Production and Scheduled Production.

#	DATE	ACTUAL				SCHED		ACT + PROD
		PROD	COLL	GST. VISITS	NGST. VISITS	PROD	NEW GST.	PROD
		1	Thu, 2019-06-27	\$1,548	\$0	4	0	\$0
2	Fri, 2019-06-28	\$3,322	\$0	4	0	\$0	0	\$3,322
3	Mon, 2019-07-01	\$4,848	\$0	12	0	\$0	0	\$4,848

15

OPERATIONS (Marketing)

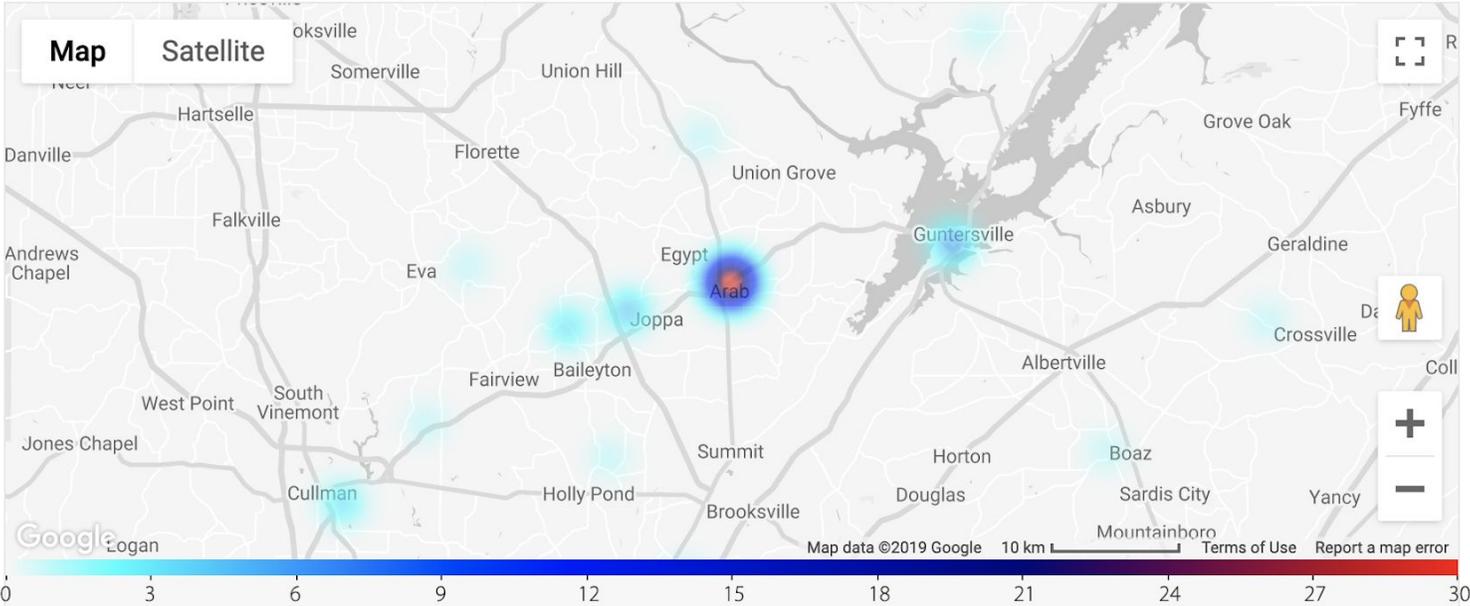
The **Marketing Report** has two sub reports: (1) Default and (2) guest Analysis. This report is also available in the Marketing Module.



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.

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OPERATIONS (Marketing)



Top 10 Zip Codes		Aug 1 2019 - Aug 31 2019
#	ZIP CODE	NGST. VISITS
1	35016	42
2	35976	6
3	35019	5
4	35031	5
5	35087	4
6	35175	4
7	35055	3
8	35083	3
9	35621	2
10	35962	1
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.

15

OPERATIONS (Marketing)

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.

Referral Source - New Guests							
Aug 1 2019 - Aug 31 2019							
#	REFERRAL	PROD	NGST. VISITS	PROD/GST	AVG Lifetime Visits	AVG Lifetime Production	% OF TTL
1	No source listed.	\$6,951	39	\$178	2	\$396	100%
TOTAL:		\$6,951	39				100%

Payor Source - New Guests							
Aug 1 2019 - Aug 31 2019							
#	PAYOR	PROD	NGST. VISITS	PROD/GST	AVG Lifetime Visits	AVG Lifetime Production	% OF TTL
1	ALABAMA MEDICAID (BOS)	\$762	9	\$85	1	\$305	23%
2	All Kids - BC/BS of Alabama	\$447	4	\$112	2	\$164	10%
3	Ameritas	\$515	3	\$172	2	\$181	8%
4	BC/BS of AL	\$335	1	\$335	1	\$335	3%
5	Blue Cross Blue Shield	\$135	2	\$68	1	\$68	5%
6	Blue Cross Blue Shield of AL	\$135	1	\$135	1	\$135	3%
7	Cash	\$1,964	11	\$179	2	\$503	28%
8	CEENA	\$436	3	\$145	3	\$983	8%
9	Delta Dental	\$1,401	1	\$1,401	1	\$1,401	3%
10	Dentaquest Cigna Healthspring	\$650	2	\$325	2	\$428	5%
11	MetLife	\$123	1	\$123	1	\$123	3%
12	United Concordia	\$48	1	\$48	1	\$47	3%
TOTAL:		\$6,951	39				100%

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OPERATIONS (Marketing)

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.

Referral Source - Returning Guests		Dec 22 2019 - Jan 20 2020						
#	REFERRAL	PROD	GST. VISITS	PROD/GST	AVG Lifetime Visits	AVG Lifetime Production	% OF TTL	
1		\$191.53	5	\$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	15	\$98.51	7	\$1,198.18	1.56%	
6		\$1,354.92	16	\$84.68	10	\$1,875.75	1.67%	
7		\$449.59	8	\$56.20	8	\$617.93	0.83%	
8		\$1,994.51	23	\$86.72	10	\$1,700.55	2.40%	
9		\$2,536.20	20	\$126.81	12	\$1,545.45	2.09%	
10		\$1,391.25	11	\$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%	

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OPERATIONS (Marketing)

Referral Source - Returning Guests								350 New Guest via: No Source Listed								
#	REFERRAL	PROD	GST. VISITS	PROD/GST	AVG Lifetime Visits	AVG Lifetime Production	% C	#	GUEST	PRODUCTION	% OF TTL	LIFETIME VISITS	LTV \$	FIRST VISIT DATE	GENDER	AGE
1		\$191.53	5	\$38.31	4	\$406.40		1	Martinez, Isabella	\$142.07	0.36%	2	\$	2018-07-10	Female	2
2		\$0.00	1	\$0.00	10	\$0.00		2	Rodriguez, Brian	\$0	0%	1	\$	2016-10-13	Male	9
3		\$0.00	1	\$0.00	3	\$903.00		3	Guel, Brandon	\$80.3	0.2%	1	\$	2017-07-28	Male	4
4		\$0.00	2	\$0.00	10	\$1,069.93		4	Mendoza, Miranda	\$138.980	0.35%	2	\$	2016-08-02	Female	12
5		\$1,477.69	15	\$98.51	7	\$1,198.18		5	ABREGO, ADRIANNA	\$0	0%	1	\$	2019-03-21	Female	17
6		\$1,354.92	16	\$84.68	10	\$1,875.75		6	Rico, Alexis	\$220.89	0.56%	2	\$	2016-11-01	Female	15
7		\$449.59	8	\$56.20	8	\$617.93		7	GARZA, KATELIN	\$0	0%	1	\$	2020-01-14	Female	13
8		\$1,994.51	23	\$86.72	10	\$1,700.55		8	Guerrero, Jose	\$0	0%	2	\$	2017-02-28	Male	11
9		\$2,536.20	20	\$126.81	12	\$1,545.45		9	Lara, Elizabeth	\$155.99	0.39%	1	\$	2017-10-16	Female	9
10		\$1,391.25	11	\$126.48	3	\$455.20		10	Ramirez, Christofer	\$331.15	0.83%	2	\$	2016-08-19	Male	11
11		\$306.72	2	\$153.36	7	\$1,720.36		11	BARRERA, JORGE	\$0	0%	1	\$	2019-09-27	Male	17
12		\$214.19	1	\$214.19	5	\$364.60		12	MALDONADO, MELISSA	\$0	0%	1	\$	2020-01-14	Not Specified	9
								13	Juarez, Yandel	\$0	0%	2	\$	2017-03-24	Male	10
								14	Cruz, Julian	\$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)

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OPERATIONS (Marketing)

GUEST DATA

INFORMATION	NOTES	TX PLANS	LEDGER
PERSONAL INFORMATION			
NAME	XXXXXXXXXX		
GENDER	M		
AGE	32		
RESP PARTY	XXXXXXXXXX		
WORK PHONE			
CELL PHONE			
HOME PHONE			
EMAIL			
INSURANCE INFORMATION			
POLICY HOLDER	XXXXXXXXXX		
RELATIONSHIP	Self		
REMAINING BENEFITS	XXXXXX		
DEDUCTIBLE	0		
EMPLOYER	XXXXXXXXXX		
GROUP #	XXXXXX		
GROUP NAME	XXXXXXXXXX		
FEE SCHEDULE			
INSURANCE NAME	XXXXXX		
CONTACT INFO	XXXXXXXXXX		

GUEST DATA

INFORMATION	NOTES	TX PLANS	LEDGER			
DATE	PROVIDER	STATUS	CODE	DESC	AMOUNT	BALANCE
2011-05-12	Humphries, Carl	Scheduled	30002	Suture Removal	\$0	\$0
2011-09-28	Humphries, Carl	Unscheduled	D1204	Fluoride w/o prophylaxis-adult	\$16	\$0
2012-04-04	Humphries, Carl	Scheduled	D0120	Periodic oral evaluation	\$22	\$0
2012-04-04	Humphries, Carl	Scheduled	D1110	Prophylaxis-adult	\$48	\$0
2018-10-03	Humphries, Carl	Scheduled	D1110	Prophylaxis-adult	\$48	\$0
TOTAL:					\$134	\$0

INFORMATION NOTES TX PLANS LEDGER

DESC	DATE	NOTE
	2019-08-22	Credit Card VISA XXXXXXXXXXXX5228 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

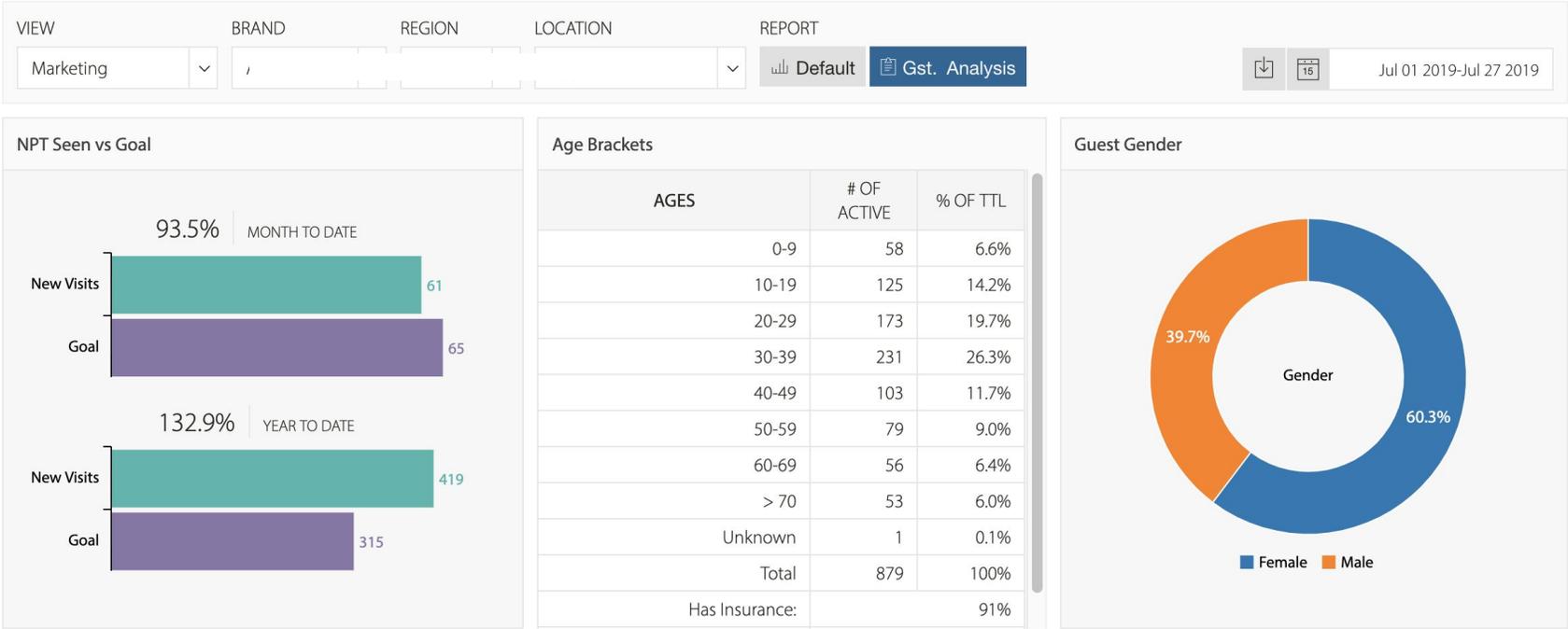
INFORMATION NOTES TX PLANS LEDGER

DATE	PROVIDER	DESC	INSURANCE	SURFACE	BALANCE	TOOTH	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, Carl	Extraction-surgical/erupt tooth	Aetna		0	1	\$104
2011-05-12	Humphries, Carl	Extraction-surgical/erupt tooth	Aetna		0	16	\$104
2017-05-04	Humphries, Carl	Resin-based comp 3 surf pos	Aetna	MBD	0	28	\$137
2018-10-03	Humphries, Carl	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.

15

OPERATIONS (Marketing | Guest Analysis)

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, MesasixAdmin

Operations ADVANCED FILTER

VIEW: Claims | BRAND: All | REGION: All Aug 2019

TOP 20% MID TIER BOT 20% Search

#	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	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N
2	W	●	Y	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	N	N
3	W	●	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	N	

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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 Portal Hello, MesasixAdmin

Patient Portal

BRAND LOCATION VIEW SETUP

Patients Reminders Performance Auto Reminder

FILTERS

Add Filters SAVE

TOTAL RESULTS: 17,037

Display Column (2) Search SEARCH PATIENTS

	NAME	AGE	BIRTH DATE
<input type="checkbox"/>	*** e	56	1962-11-12
<input type="checkbox"/>	*** y	37	1981-09-26
<input type="checkbox"/>	*** .	0	
<input type="checkbox"/>	*** as	66	1952-12-07
<input type="checkbox"/>	*** dy	53	1965-10-11
<input type="checkbox"/>	*** iifer	40	1978-09-28
<input type="checkbox"/>	***	9	2009-09-14
<input type="checkbox"/>	*** shua	35	1983-11-28

16

PATIENT PORTAL (Filters)

These are the available patient **filters**.

Patient Portal

Patient Portal

BRAND LOCATION

FILTERS

- ✓ Add Filters
- Age
- Gender
- Balances
- Last Seen

SAVE

AGE FILTER

CONDITION

VALUE(S)

20 TO 30

ADD

EQUAL
GREATER THAN
LESS THAN
✓ BETWEEN

GENDER FILTER

CONDITION

VALUE(S)

EQUAL

MALE
FEMALE

LAST SEEN FILTER

CONDITION

VALUE(S) IN DAYS

EQUAL
GREATER THAN
LESS THAN

ADD

BALANCES FILTER

CONDITION

VALUE

EQUAL
GREATER THAN
LESS THAN
BETWEEN

ADD

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

Click the X icon to remove filters.

FILTERS

Add Filters SAVE AGE between 20 to 30 GENDER = female BALANCES > 100

TOTAL RESULTS: 2

	NAME	AGE	BIRTH_DATE	GENDER	ADDRESS	CITY	STATE	PHONE
<input type="checkbox"/>		24	1994-09-05	FEMALE	147. Ave		OK	(5
<input type="checkbox"/>		30	1989-03-10	FEMALE			OK	(5

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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.

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

Click  button to refresh the data.

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

FILTERS

Add Filters

TOTAL RESULTS: 978

	NAME	AGE	BIRTH DATE	GENDER	ADDRESS	PHONE	EMAIL	FIRST VISIT
<input type="checkbox"/>		2019	0001-01-01	NA				0001-01-01
<input type="checkbox"/>		2019	0001-01-01	NA				0001-01-01
<input type="checkbox"/>		13	2006-02-14	NA				2019-03-21
<input type="checkbox"/>		15	2003-12-14	FEMALE				2019-02-11
<input type="checkbox"/>		10	2008-05-07	Male				2019-02-11
<input type="checkbox"/>		32	1986-05-26	FEMALE				0001-01-01
<input type="checkbox"/>		13	2005-07-10	Male				2019-02-28
<input type="checkbox"/>		2	2016-04-28	NA				2019-02-21
<input type="checkbox"/>		2019	0001-01-01	Male				0001-01-01

Display Column (9)

- BIRTH DATE
- GENDER
- FIRST VISIT
- AGE
- ADDRESS
- CITY
- STATE
- PHONE
- EMAIL

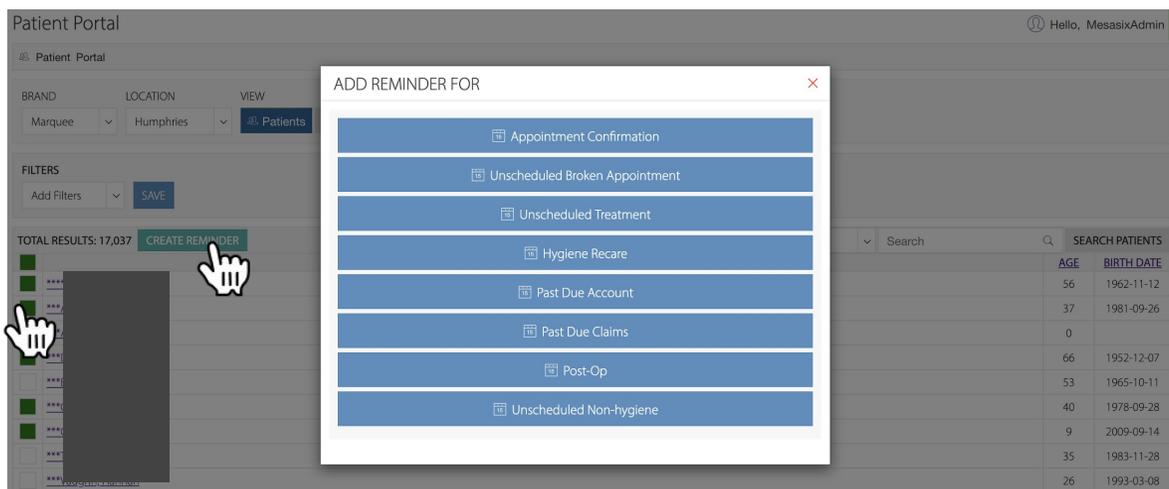
Search

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

📅 Unscheduled Treatment

📅 Hygiene Recare

📅 Past Due Account

📅 Past Due Claims

📅 Post-Op

📅 Unscheduled Non-hygiene

Reminder Date:

📅

Assigned To:

mesasixAdmin

Steven Maroulis

Debby Cummings

Catherine Maglasang

Georgina

Felo

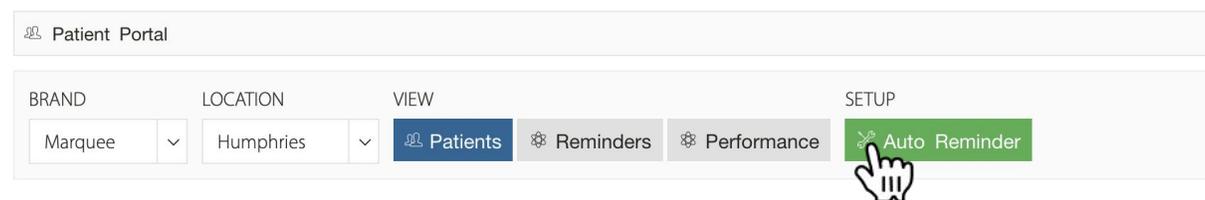
ADD REMINDERS

16

PATIENT PORTAL (Automatic Reminder Setup)

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

Patient Portal



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.

AUTO REMINDER SETUP ✕

Appt. Confirmation ⚙️

ENABLE

DAYS BEFORE UNCONFIRMED APPT.

AUTO ASSIGNED TO: Catherine Maglasang

ASSIGN TO:

mesasixAdmin
 Steven Maroullis
 Debby Cummings
 Catherine Maglasang
 Georgina
 Felo

Unscheduled Broken Appt. ⚙️

Ⓞ ENABLED

Unscheduled Treatment ⚙️

Ⓞ ENABLED

Hygiene Recare ⚙️

Ⓞ ENABLED

Past Due Accounts ⚙️

Ⓞ ENABLED

Past Due Claims ⚙️

Ⓞ ENABLED

DONE AND SAVE

16

PATIENT PORTAL (Patient Info)

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

INFO FAMILY ACTIVITY EMPLOYER LEDGER TX PLAN AR SUMMARY

NEXT VISIT NA \$0.00	LAST VISIT 2018-02-23 \$632.00 RESTORATIVE BASIC,ADJUNCTIVE GE...	REMAINING INSURANCE NA \$0.00	TREATMENT PLANS \$276.00 \$0.00 Scheduled Unscheduled
HYGIENE DUE NA scheduled: 0	LIFETIME VALUE \$1,492.40	APPOINTMENTS 75% 25% 0% Completed: 3 Sched: 1 Broken: 0	

ACTIVITY

Unscheduled Treatment DATE DUE: 2019-12-05

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

APPOINTMENTS i

50%

Completed: 1 Broken: 0

Click here to go back to the Patient Info Screen

Click this button to add notes, which will be displayed in the Activity tab.

← BACK TO PATIENT INFORMATION ADD REMINDER ADD NOTES ×

APPOINTMENT DETAILS

TYPE	PROVIDERS	APPOINTMENT DATE	STATUS NA
SCHEDULED PROCEDURES		CONFIRMATION	PRODUCTION
CODE	TYPE	DETAILS	AMOUNT PROVIDER

Add notes here CANCEL SAVE

16

PATIENT PORTAL (Patient Info)

Last Visit

← BACK TO PATIENT INFORMATION ADD REMINDER ADD NOTES ✕

APPOINTMENT DETAILS		APPOINTMENT DATE	STATUS
RESTORATIVE BASIC,ADJUNCTIVE GENERAL SERVICES		2018-02-23	Completed
TYPE	PROVIDERS	CONFIRMATION	PRODUCTION
RESTORATIVE BASIC,ADJUNCTIVE GENERAL SERVICES		NA	\$632.00

SCHEDULED PROCEDURES				
CODE	TYPE	DETAILS	AMOUNT	PROVIDER
D2393	RESTORATIVE BASIC	RESIN-BASED COMPOSITE-THREE SURF., POST.	\$632.00	
FW4L	ADJUNCTIVE GENERAL SERVICES	FREE WHITENING FOR LIFE	\$0.00	

Next Visit

← BACK TO PATIENT INFORMATION ADD REMINDER ADD NOTES ✕

APPOINTMENT DETAILS		APPOINTMENT DATE	STATUS
			NA
TYPE	PROVIDERS	CONFIRMATION	PRODUCTION

SCHEDULED PROCEDURES				
CODE	TYPE	DETAILS	AMOUNT	PROVIDER

Hygiene Due

← BACK TO PATIENT INFORMATION ADD REMINDER ADD NOTES ✕

APPOINTMENT DETAILS		APPOINTMENT DATE	STATUS
TYPE	PROVIDERS	CONFIRMATION	PRODUCTION

HYGIENE DUE				
CODE	TYPE	DETAILS	AMOUNT	PROVIDER

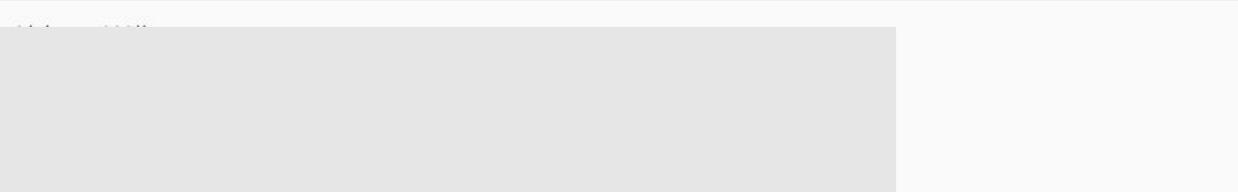
16

PATIENT PORTAL (Patient Info)

Remaining Insurance

← BACK TO PATIENT INFORMATION

ADD REMINDER ADD NOTES ✕



REMAINING INSURANCE

PRIMARY INSURANCE

NA
NA

\$0.00 Deductible	\$841.00 Total	\$0.00 Remaining
-----------------------------	--------------------------	----------------------------

INSURANCE CLAIMS

Carrier	Est. \$	Date
● Carter-Collier LLC	\$379	2017-11-09
● Carter-Collier LLC	\$555	2017-11-07

SECONDARY INSURANCE

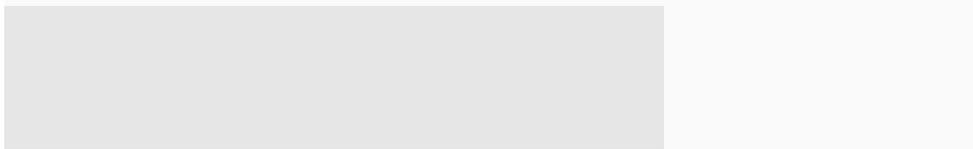
NA
NA

\$0.00 Deductible	\$0.00 Total	\$0.00 Remaining
-----------------------------	------------------------	----------------------------

Appointment History

← BACK TO PATIENT INFORMATION

ADD REMINDER ADD 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
	COMPRFHNSIVE ORAL EVALUATION Varnich				

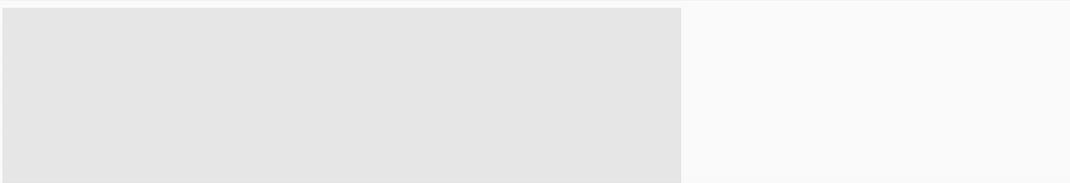
16

PATIENT PORTAL (Patient Info)

FAMILY

PATIENT INFORMATION

ADD REMINDER ADD NOTES X



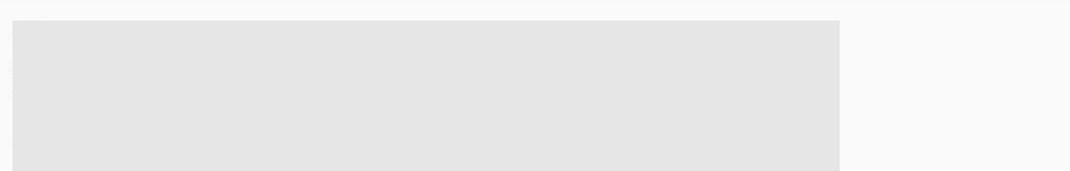
INFO **FAMILY** ACTIVITY EMPLOYER LEDGER TX PLAN AR SUMMARY

		LAST VISIT	NEXT VISIT	HYGIENE DUE
	Active	2019-10-22	2020-06-06	2020-12-06
	Active	2019-12-12	2020-06-15	2020-12-15

ACTIVITY

PATIENT INFORMATION

ADD REMINDER ADD NOTES X



INFO FAMILY **ACTIVITY** EMPLOYER 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

16

PATIENT PORTAL (Patient Info)

EMPLOYER

PATIENT INFORMATION

ADD REMINDER ADD NOTES X



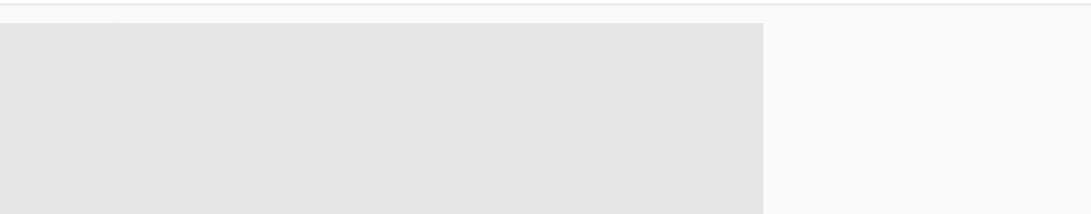
INFO FAMILY ACTIVITY EMPLOYER LEDGER TX PLAN AR SUMMARY

CODE	DESC	TOOTH	SURFACE	AMOUNT	PROVIDER	STATUS	DATE PLANNED	DATE SCHEDULED
D0603	caries risk assessment and documentation, with a finding of high risk	--	--	\$0		Unscheduled	2019-01-23 00:00:00	
D9248	non-intravenous conscious sedation	--	--	\$0		Unscheduled	2019-01-23 00:00:00	

LEDGER

PATIENT INFORMATION

ADD REMINDER ADD NOTES X



INFO FAMILY ACTIVITY EMPLOYER LEDGER TX PLAN AR SUMMARY

CODE	DESC	TOOTH	SURFACE	AMOUNT	PROVIDER	DATE
D0140	limited oral evaluation - problem focused	--	--	\$19		2019-01-23
D0230	intraoral - periapical each additional radiographic image	K	--	\$12		2019-01-23

16

PATIENT PORTAL (Patient Info)

TREATMENT PLANS

PATIENT INFORMATION ADD REMINDER ADD NOTES ×

INFO FAMILY ACTIVITY EMPLOYER LEDGER **TX PLAN** AR SUMMARY

CODE	DESC	TOOTH	SURFACE	AMOUNT	PROVIDER	STATUS	DATE PLANNED	DATE SCHEDULED
D3330	MOLAR (EX. FINAL RESTORATION)	20	S	\$1,366		Unscheduled	2017-05-10	
D6740	CROWN - PORCELAIN/CERAMIC	21	--	\$772		Unscheduled	2017-05-10	

ACCOUNTS RECEIVABLE SUMMARY

PATIENT INFORMATION ADD REMINDER ADD NOTES ×

INFO FAMILY ACTIVITY EMPLOYER LEDGER TX PLAN **AR SUMMARY**

ACCOUNTS RECEIVABLE SUMMARY

TOTAL: **\$0.00** INSURANCE CLAIMS: **\$0.00** ESTIMATED PATIENTS: **\$0.00**

CURRENT	30+ DAYS	60+ DAYS	90+ DAYS
\$0.00	\$0.00	\$0.00	\$0.00

CODE	DESC	AMOUNT	PROVIDER	DATE
PATIENT PAYMENTS	2502	-\$483	Anonymous, Provider	2017-05-10
D0330	PANORAMIC FILM	\$0	Anonymous, Provider	2017-05-10

16

PATIENT PORTAL (Reminders)

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 screenshot displays the 'Patient Portal' interface. At the top right, it says 'Hello, MesasixAdmin'. The main navigation bar includes 'Patient Portal', 'Patients', 'Reminders' (selected), 'Performance', and 'Auto Reminder'. Below this is a grid of 8 reminder tiles, each with a calendar icon, a count of 0, and a title: Appointment Confirmation, Unscheduled Broken Appointment, Unscheduled Treatments, Hygiene Recare, Past Due Account, Past Due Claims, Post-Op, and Unscheduled Non-hygiene. At the bottom, there are two tabs: 'ALL REMINDERS' and 'MY REMINDERS'. Below the tabs is a filter section with 'TYPE: All', a 'PAST DUE ONLY' checkbox, and a search bar with 'TOTAL RESULTS: 0'. A table header is visible with columns: NAME, ATTEMPTS, EST, DUE.

16

PATIENT PORTAL (Reminders)

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

Here, you can either complete or update a reminder.

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

Complete Reminder ✕

Are you sure you want to complete reminders for Ahlemeier, Madalynn?

Yes Complete it!

REMINDERS		MY REMINDERS			
#	NAME	ATTEMPTS	EST	DUE	
1	Ahl Appt. Confirmation	0	\$0	2019-04-24	<input checked="" type="checkbox"/>
2	Ale Unscheduled Broken Appt.	0	\$78	2019-02-11	<input type="checkbox"/>
3	Bal Appt. Confirmation	0	\$248	2019-04-24	<input type="checkbox"/>
4	Bisl Unscheduled Treatment	1	\$1,316	2019-02-11	<input type="checkbox"/>
5	Ma Unscheduled Treatment	3	\$882	2019-04-23	<input type="checkbox"/>
6	Ma Unscheduled Treatment	0	\$2,727	2019-02-11	<input type="checkbox"/>
7	Pin Unscheduled Treatment	0	\$308	2019-02-11	<input type="checkbox"/>

16

PATIENT PORTAL (Reminders)

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.

UPDATE REMINDER STATUS

Reschedule Reminder | No decision made

Attempt Due: 2019-04-24

2019-04-23 18:56:39 by Rodzainna Hamisain
Patient Reminder Taken

REMINDERS MY REMINDERS

TYPE: All ASSIGNED TO: All PAST DUE ONLY: TOTAL RESULTS: 7 Search

#	NAME	ATTEMPTS	EST	DUE		
1	Ahle Appt. Confirmation	0	\$0	2019-04-24	✓	📅
2	Aley Unscheduled Broken Appt.	0	\$78	2019-02-11	✓	📅
3	Balc Appt. Confirmation	0	\$248	2019-04-24	✓	📅
4	Bish Unscheduled Treatment	1	\$1,316	2019-02-11	✓	📅
5	Mas Unscheduled Treatment	3	\$882	2019-04-23	✓	📅
6	Mas Unscheduled Treatment	0	\$2,727	2019-02-11	✓	📅
7	Pins Unscheduled Treatment	0	\$308	2019-02-11	✓	📅

16

PATIENT PORTAL (Reminders)

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 ✕

📅 Reschedule Reminder
📅 No decision made

April 2019

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

Ahl..... ynn appt_confirmation 🔄 Attempt Due: 2019-04-24

2019-04-23 18:56:39 by Rodzainna Hamisain
Patient Reminder Taken

UPDATE REMINDER

UPDATE REMINDER STATUS ✕

📅 Reschedule Reminder
📅 No decision made

April 2019

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

Ahl..... ynn appt_confirmation 🔄 Attempt Due: 2019-04-24

2019-04-23 18:56:39 by Rodzainna Hamisain
Patient Reminder Taken

UPDATE REMINDER

16

PATIENT PORTAL (Reminders)

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

UPDATE REMINDER STATUS



Reschedule Reminder
 No decision made

unscneueia_treatment
 Attempt **Due: 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 Rodzainna Hamisain to mesasixAdmin
 This is a test.

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

The screenshot shows the Patient Portal interface. At the top, there are filters for BRAND (Atlas), LOCATION (Apple), and VIEW (Performance). Below these are several tabs: Patients, Reminders, Performance (selected), and Auto Reminder. A red box highlights the 'View ALL' button. Below the tabs, there is a section for 'APPOINTMENT CONFIRMATION' with a table header showing '#', 'NAME', and 'No data available.' A hand cursor is pointing at the 'View ALL' button.

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

To download the report to CSV, click



The screenshot shows a data table with the following columns: TTL REMINDERS, ATTEMPTS, CONTACTED, %, Completed, Scheduled \$, and %. A hand cursor is pointing at a green download icon in the top right corner of the table.

TTL REMINDERS	ATTEMPTS	CONTACTED	%	Completed	Scheduled \$	%
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

The screenshot shows the 'Patient Portal' interface. At the top right, it says 'Hello, Mesasix'. Below the header, there are filters for 'BRAND' and 'LOCATION', and a 'VIEW' section with tabs for 'Patients', 'Reminders', 'Performance' (highlighted with a red arrow), and 'Auto Reminder'. A date range 'Jul 01 2019-Jul 30 2019' is also visible. Below the navigation tabs, there are two pie charts: 'TAKEN REMINDERS' showing 142.9% for 'Steven Maroulis' and 'Not taken', and 'SCHEDULED REMINDERS' showing 42.9% for 'All Reminders' and 57.1% for 'Scheduled'. At the bottom, a table lists agent performance for Steven Maroulis.

#	NAME	TTL REMINDERS TAKEN	ATTEMPTS	CONTACTED	%	Completed	Scheduled \$	%
1	Steven Maroulis	10	8	11	110%	4	\$76,917	40%

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, MesasixAdmin

Providers

Use filter to select providers with ID type not set.

BRAND LOCATION ALL VIEW

Main
Hidden
KPI Doctor Provider
KPI Hidden
APPLY DEFAULT RULES
CLEAR RULES SET

Provider list Search

#	PROVIDER NAME	TYPE	3YRS PROD	LAST ACTIVE	LOCATION	HIDE	PROVIDER ID	DOCTOR	HYGIENE	ORAL SURGERY	INVISALIGN	PERIO	PEDO	ENDO	ORT
1	ri	Dentist	\$4,409,863.0	2019-08-29	Humphries	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		Hygienist	\$153,021.5	2019-08-29	Humphries	<input type="checkbox"/>	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
3		Hygienist	\$1,674.0	2018-04-12	Humphries	<input type="checkbox"/>	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
4		Office Staff	\$581.0	2018-07-17	Humphries	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5		Dental Assistant	\$15,986.5	2019-08-29	Humphries	<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 will not 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 Hello, MesasixAdmin

Providers

Use filter to select providers with ID type not set.

BRAND LOCATION ALL VIEW

Main
Hidden
KPI Doctor Provider
KPI Hidden
APPLY DEFAULT RULES
CLEAR RULES SET

Hidden Provider list Search

#	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.

Providers Hello, MesasixAdmin

Providers

Use filter to select providers with ID type not set.

BRAND LOCATION ALL VIEW

Main Hidden KPI Doctor Provider KPI Hidden

Provider list Search

#	PROVIDER NAME	TYPE	3YRS PROD	LAST ACTIVE	LOCATION	HIDE	PROVIDER ID	DOCTOR	HYGIENE	ORAL SURGERY	INVISALIGN	PERIO	PEDO	ENDO	ORT
1	V J	Dentist	\$2,282,244.8	2019-08-29	Weissman	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	C /	Hygienist	\$228,861.1	2019-08-29	Weissman	<input type="checkbox"/>	ACO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
3	M	Dentist	\$374,247.0	2019-08-28	Weissman	<input type="checkbox"/>	AN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	C J	Hygienist	\$187,584.0	2019-08-05	Weissman	<input type="checkbox"/>	BGH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
5	E C	Dental Assistant	\$191.0	2019-08-12	Weissman	<input type="checkbox"/>	DGD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18

SETTINGS

Dashboard Settings

Hello, MesasixAdmin

Settings

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

GOAL

Production

15 Sep 2019

Search

#	LOCATION	TYPE	GOAL	ACTION
1	H	Production	\$0	⬇️⬆️⬇️
2	W	Production	\$0	⬇️⬆️⬇️
3	Westen	Production	\$0	⬇️⬆️⬇️

- ✓ Production
- Collection
- Pts Visits
- Npt Visits
- Ini. Bonding

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 successful.

- Download the system generated [template](#).

Note: The template is pre-populated 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 be used for mapping)
- Upload the modified CSV and submit.

 No file chosen

 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.
3. 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.

Update Goal ✕

Location

Goal

Use Monthly Goal

Default daily Production Goal \$:

Goal

< > August 2018 today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 \$0	2 \$0	3 \$0	4
5	6 \$0	7 \$0	8 \$0	9 \$0	10 \$0	11
12	13 \$0	14 \$0	15 \$0	16 \$0	17 \$0	18
19	20 \$0	21 \$0	22 \$0	23 \$0	24 \$0	25
26	27 \$0	28 \$0	29 \$0	30 \$0	31 \$0	1
2	3	4	5	6	7	8

Clear Update

Cloud 15 Sep 2017

Search

	TYPE	GOAL	ACTION
	Production	\$55,000	Edit
	Production	\$0	↓↑
	Production	\$65,000	↓↑

 Click on the Edit label, and a modal will appear which allows you to enter your production goal for that specific day

19

TX MINER

Tx Miner Last data sync: 2018-08-03 01:08 PM

VIEW: Treatment Statistics | BRAND: Brush 32 | LOCATION: [dropdown] | NET TX PLAN: [toggle]

PROVIDER(S): All providers x Add a provider | PROCEDURE(S): All procedures x Add a procedure | PATIENT(S): All patients x Add a patient | GET REPORT

Calendar: Aug 2018

Treatment Statistics | Treatment Stat [dropdown] [download]

#	MONTH	TOT TX PL	\$ PENDING SCH	\$ PENDING USC	ACT PROD	% CLOSED	# TX. PL. PRESENTED	AVG \$/TX PL.	% PTS. 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

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TX MINER

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

VIEW: Treatment Statistics | BRAND: Brush 32 | LOCATION: [] | NET TX PLAN: | Date: Aug 2018

PROVIDER(S): All providers x Add a provider | PROCEDURE(S): All procedures x Add a procedure | PATIENT(S): All patients x Add a patient | GET REPORT

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TOTAL:		\$1,130,794	\$86,126	\$830,462	\$214,206	19%	333		

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TX MINER

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.

Tx Miner Last data sync: 2018-08-03 01:08 PM

VIEW: Treatment Statistics | BRAND: Brush 32 | LOCATION: [] | NET TX PLAN:

PROVIDER(S): All providers x Add a provider |
 PROCEDURE(S): All procedures x Add a procedure |
 PATIENT(S): All patients x Add a patient

GET REPORT

Treatment Statistics Treatment Stat []

#	MONTH	TOT TX PL	\$ PENDING SCH	\$ PENDING USC	ACT PROD	% CLOSED	# TX. PL. PRESENTED	AVG \$/TX PL.	% PTS. w/TR. PL.
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TX MINER

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.

Tx Miner Last data sync: 2020-01-20 04:01 PM

VIEW: Treatment Statistics | BRAND: All | LOCATION: Calton | NET TX PLAN:

PROVIDER(S): All providers | PROCEDURE(S): All procedures | GUEST(S): All guests | [GET REPORT](#)

Calendar: Jan 2020

Treatment Statistics Treatment Stat

#	MONTH	TOT TX PL	\$ PENDING SCH	\$ PENDING USC	ACT PROD	% CLOSED	# TX. PL. PRESENTED	AVG \$/TX PL.	% GST. w/TR. PL.
1	2019-02	\$360,587	\$25,921	\$163,592	\$171,073	47%	188	\$1,918	69%
2	2019-03	\$378,967	\$34,140	\$140,458	\$204,370	54%	428	\$885	58%
3	2019-04	\$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	2019-08	\$311,031	\$77,208	\$67,665	\$165,058	53%	101	\$1,629	42%

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TX MINER

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

Tx Miner

VIEW: Treatment Statistics | BRAND: All | LOCATION: App | NET TX PLAN:

PROVIDER(S): All providers | PROCEDURE(S): All procedures | GUEST(S): All guests | GET REPORT

LEDGER RESERVATION: 100.00% / 99.84% | Hello, Steven Maroulis | Last data sync: 2019-10-08 03:16 AM

Treatment Statistics 2019-02 | Treatment Stat | Search

	GUEST NAME	CHART #	TYPE	PEND. TX \$ SCH	PEND. TX \$ USC	ACT PROD	REFERRED TO	REM. BENEFITS	STATUS	PREF. PROV.	INSURANCE
<input type="checkbox"/>			Existing	\$179	\$0	\$0	--	\$0	I	DL	
<input type="checkbox"/>			New	\$143	\$6,276	\$208	--	\$2,000	A	DL	Hamill LLC and Sons
<input type="checkbox"/>			New	\$0	\$1,308	\$115	--	\$1,000,000	A	DL	Olson, Jacobs and Kling Group
<input type="checkbox"/>			Existing	\$208	\$0	\$0	--	\$2,000	A	DL	Wilkinson, Pfannerstill and Mertz and S
<input type="checkbox"/>			0	\$0	\$0	\$0	--	\$0	1	JC	Bogan and Sons LLC

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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.

PATIENT DATA ✕

INFORMATION NOTES TX PLANS LEDGER

PERSONAL INFORMATION

NAME	George Brunner - 107
GENDER	M
AGE	78
RESP PARTY	George Brunner
WORK PHONE	
CELL PHONE	
HOME PHONE	
EMAIL	

INSURANCE INFORMATION

POLICY HOLDER	
RELATIONSHIP	
REMAINING BENEFITS	
DEDUCTABLE	
EMPLOYER	
GROUP #	
GROUP NAME	
FEE SCHEDULE	
INSURANCE NAME	
CONTACT INFO	

PATIENT DATA ✕

INFORMATION NOTES TX PLANS LEDGER

DESCRIPTION	DATE	NOTE
Account note for patient 107	2018-08-01	*****Pt is still not ready to schedule tx due to medical Bills***JSP
	2018-06-13	Statement Processed With No Message Included.
	2018-06-08	Prim Insurance Claim from April 4, 2018 was closed.
	2018-06-08	Service D0274 was Modified Aging Date of Service was changed from 4/4/2018 to 6/8/2018
	2018-06-08	Service D0150 was Modified Aging Date of Service was changed from 4/4/2018 to 6/8/2018
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

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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

Waterfall Report Hello, MesasixAdmin

Waterfall Report ADVANCED FILTER

BRAND: All REGION: All LOCATION: Humphries Sep 2019

#	MONTH	GR. PROD	PAYMENTS												TOTAL PAYMENTS	% PAYMENT OF GR. PROD		
			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	
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%

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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 separate 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

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BASE DEFINITIONS

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 \$

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BASE DEFINITIONS

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 \$

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BASE DEFINITIONS

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 \$



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DOCTOR KPIS

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

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HYGIENE KPIS

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

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OFFICE KPIS

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?

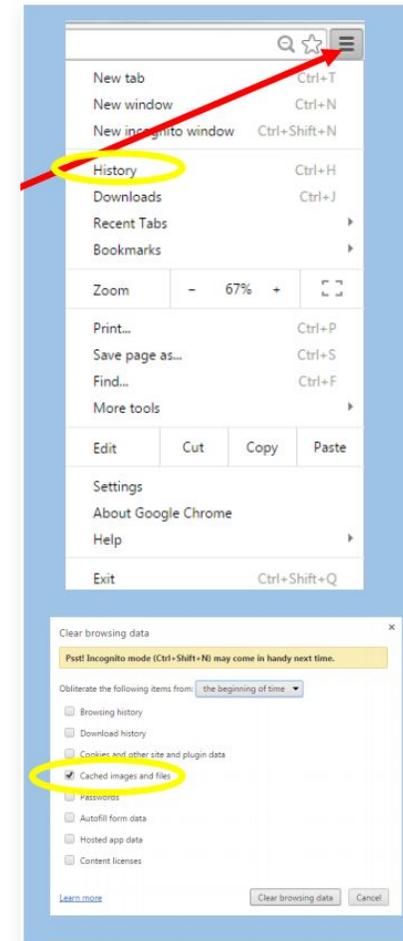
- Before you contact support, try clearing your cache. Go to your Google settings and click on History. Click clear browsing history. Then uncheck all of the boxes except for Cached images and file. Click Clear browsing data.

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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