

# Jarvis Dashboard User Guide

 Last Updated: September 2021

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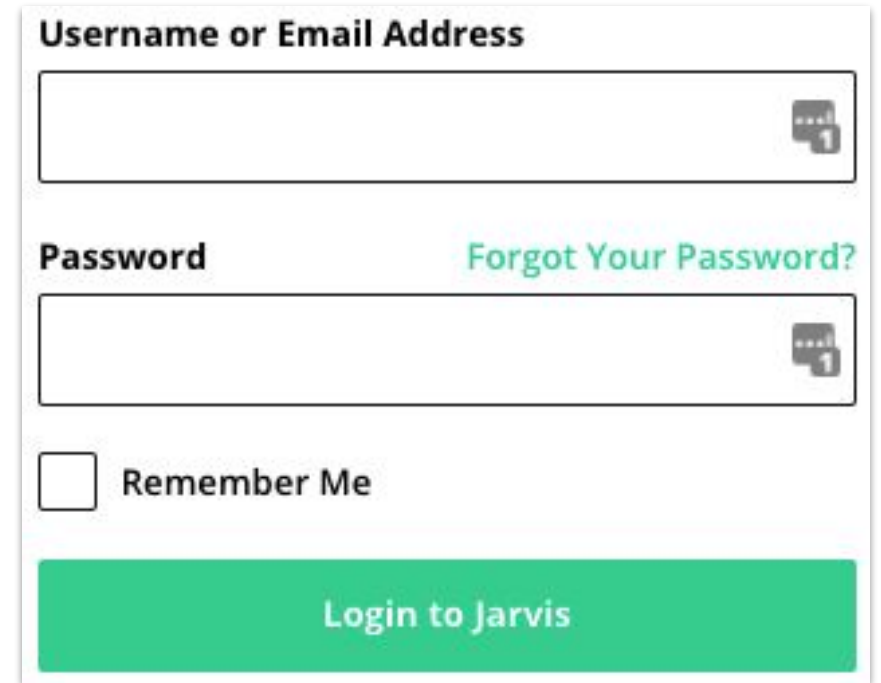
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# Getting Started - My Preferences

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

## Note:

- If you don't have an account yet, email [support@jarvisanalytics.com](mailto: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 **"Forgot your password?"** and a new password will be sent to your email.



The screenshot shows a login interface for Jarvis Analytics. It features two input fields: 'Username or Email Address' and 'Password'. The 'Password' field has a 'Forgot Your Password?' link to its right. Below the password field is a 'Remember Me' checkbox. At the bottom is a large green button labeled 'Login to Jarvis'.

Username or Email Address

Password [Forgot Your Password?](#)

☐ Remember Me

Login to Jarvis

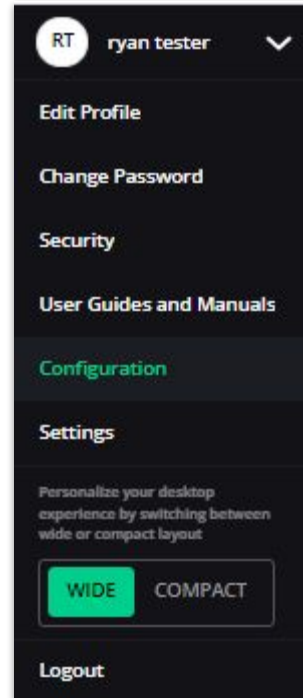
We recommend the use of Google Chrome as some features may not work properly in other browsers.

[Don't have Google Chrome yet? Download it here.](#)

# Changing Your Password

You can change your password at any time.

1. On the Right side of the screen, click on your user icon.
2. Your profile will populate. Here, you can edit your profile to change your password, or visit the Security View to enable 2-factor authentication.
3. Select **"Change Password"**
4. Enter **Current Password**, your desired password in **"Password"** and **"Confirm Password"**
5. Press **"Save Changes"** to save changes.



## Account

Profile **Password** Security

### Change Your Password

- Complex passwords are required where possible. Complex passwords have at least 8 characters, 1+ uppercase letter(s), 1+ lowercase letter(s), 1+ non-alphanumeric character(s)
- Passwords must have at least 8 characters
- Do not reuse previously used passwords or their variants
- Do not use commonly used passwords

Current Password

Password

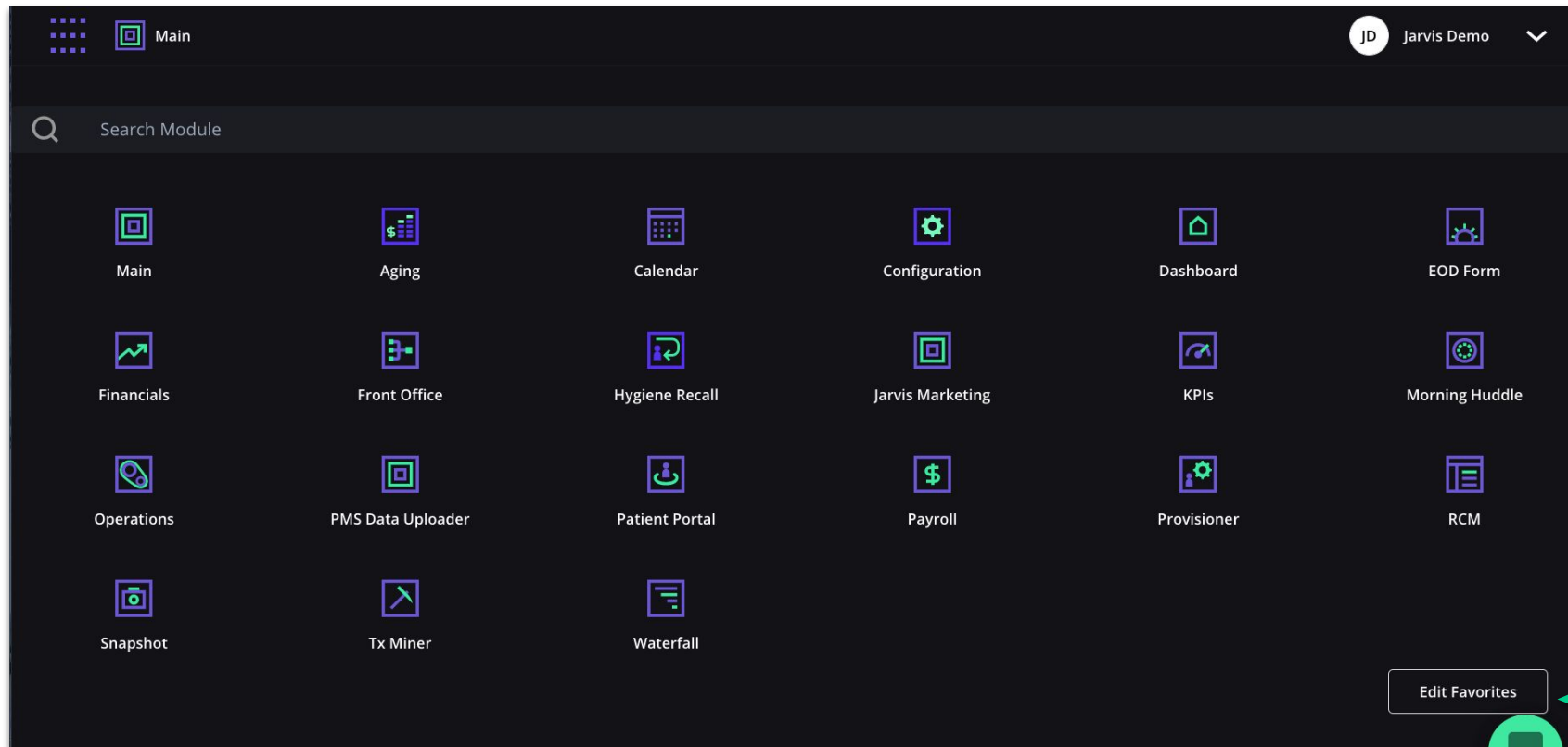
Confirm Password

Save Changes



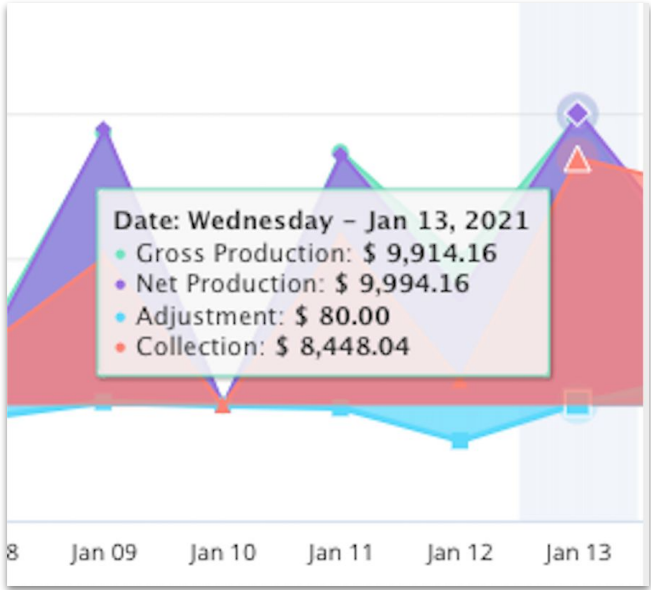
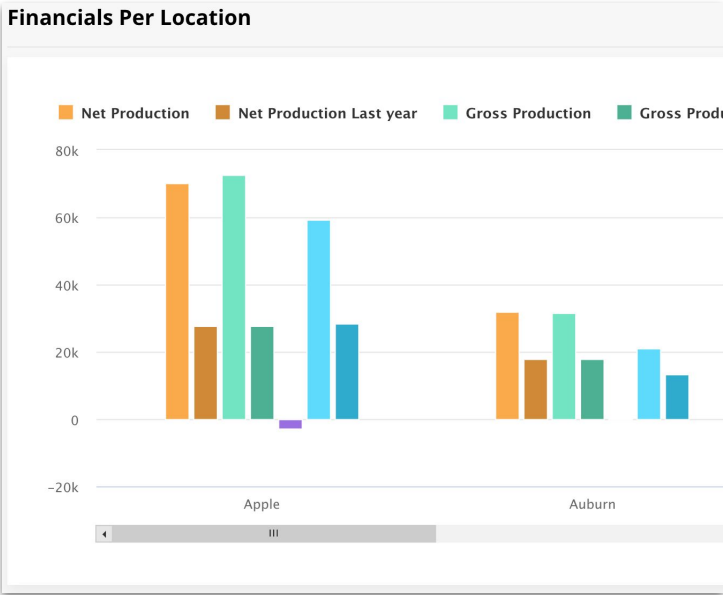
# Navigation

You can go to your desired module by clicking the module name in the dropdown on the top of the page



**Jarvis Tip!**  
Use the *edit favorites* to view set you favorite modules you would like to see at the top of the page

# Graphs

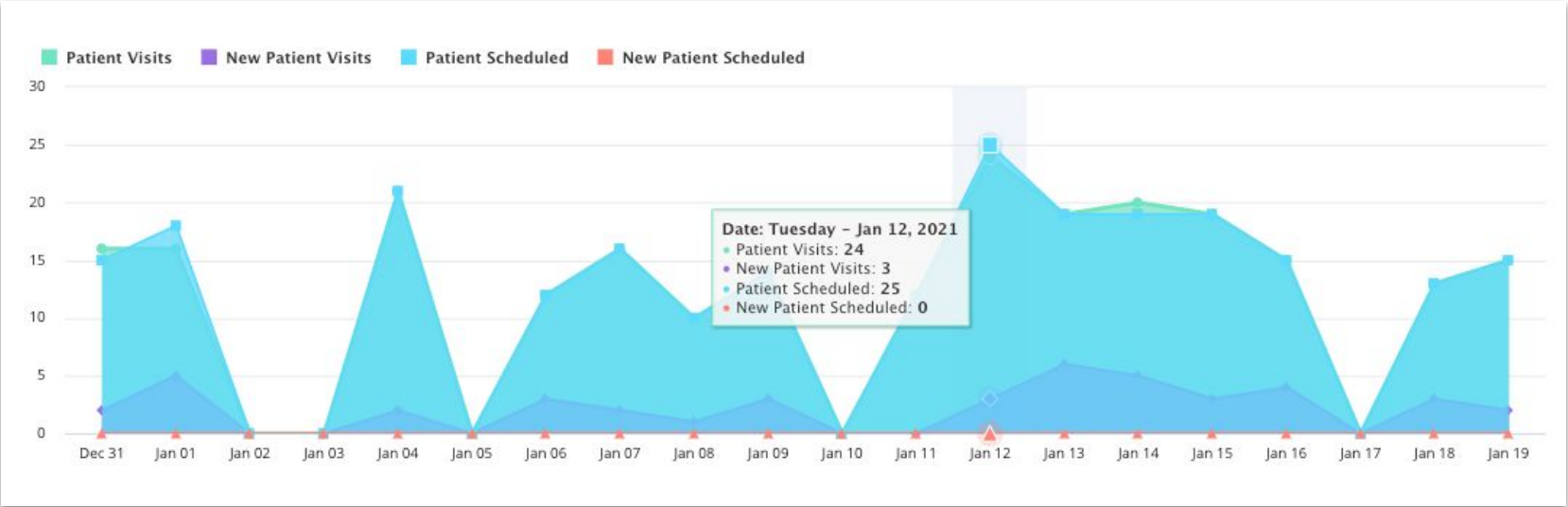


Hover over graphs to see detailed information.

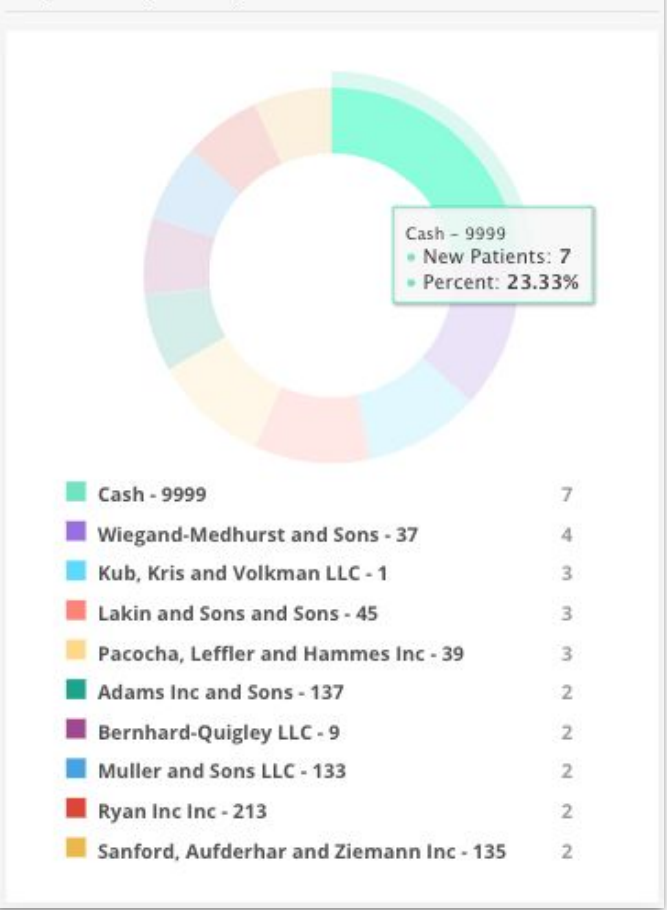


# Graphs

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




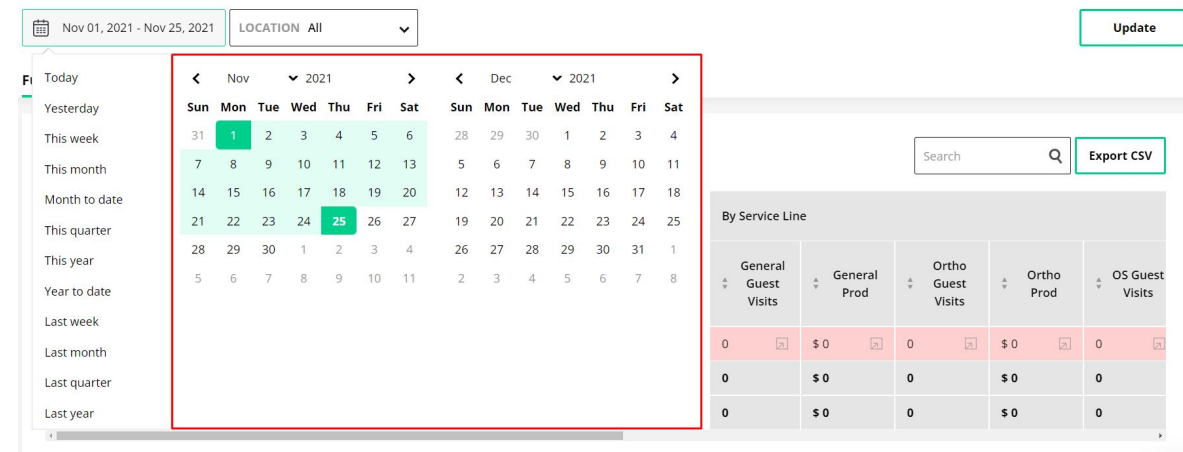
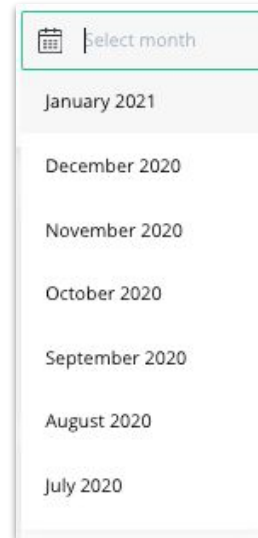
Top 10 Payors | New Patients




# Date Picker


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


1. Click on the Calendar Icon 
2. Choose the desired Date Range
3. The calendar will expand enabling you to choose from and to dates
4. Click on "**Update**" to generate the data



# Other basic functionalities

 See different views in modules by selecting by the various tabs located at the top of the module.

 Indicates an increase

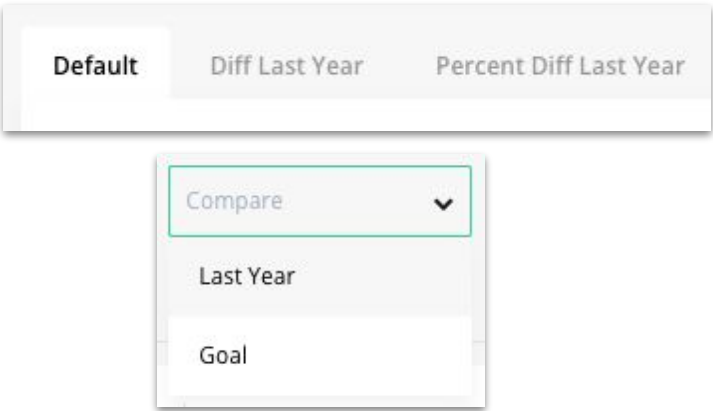
 Indicates a decrease



Export data into CSV by clicking this download button.

Use the compare tabs or compare drop downs to compare:

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

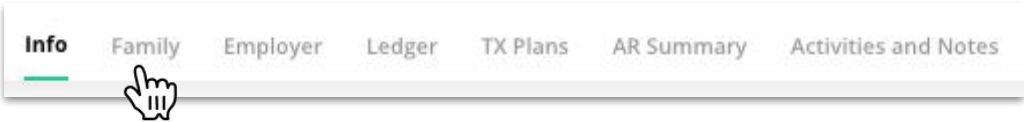


To search for data, enter any words that you think matches your desired result.

# Patient information card

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

To see detailed information, click on the tab. A new modal will appear.



Patient Information

AN Angelo Abbott

Add Reminder

InfoFamilyEmployerLedgerTX PlansAR SummaryActivities and Notes

Patient Information

Age44

GenderFemale

BirthdateAug 24, 1976


StatusActive

Mobile Phone609328

Work Phone4658007

Home Phone1506501

Email Addressbreanablock@l...



Address581 Lake Portland

CityLakesfurt

StateTX

Zip78660

Overview

Next Visit

N/A\$0

Last Visit

Jun 29, 2020\$31.50

Remaining Insurance

\$999,999.99

Treatment Plans

\$0\$204.50

Hygiene Due

Dec 29, 2020

Lifetime Value

\$846.00

Appointments

83.33%

Completed: 5

Scheduled: 0

Broken: 1

Patient Information

AB Abbott, Angelo

Add Reminder

InfoFamilyEmployerLedgerTX PlansAR SummaryActivities and Notes

Name	Status	Gender	Last Visit	Next Visit	Hygiene Due
Bradtko, Arlene	Active	Male	Aug 01, 2020	N/A	Feb 01, 2021
Will, Melisa	Active	Female	Aug 01, 2020	N/A	Feb 01, 2021

JARVIS  
ANALYTICS

PRIVATE & CONFIDENTIAL 10

# Reminders (Manual Reminders)

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

1. Click the icon next to a patient name from any module in Jarvis (Below we will be showing the Patient Portal)
2. Wait for the window to populate, and then select **"Add Reminder"**
3. Fill in the reminder type, date, and assignee.
4. Click the **"Add Reminder"** button.

**Patient Portal**

Apple [v] Refresh

Patients Reminders Performance

Additional Filters (0)

+ Add Filter Save

Reset Search Search Export CSV

	Patient Name	Patient ID	Age	Gender	Address	City	State	ZIP	Work Phone	Email	First Visit Date
<input type="checkbox"/>	Abbott, Sedrick	1002		Female	565 Port Ranchmouth	Throughwayton	TX	78660	462-876-3	taureankunze@kuvalis.org	N/A
<input type="checkbox"/>	Abbott, Virginia	073	57	Male	794 East Bypassmouth	Dividestad	TX	78660	1-848-512	chanelwindier@tromp.biz	Jun 22, 2018
<input type="checkbox"/>	Abbott, Angelo	1767	44	Female	581 Lake Portland	Lakesfurt	TX	78660	465-800-7	breaanablock@langworth.name	Dec 28, 2018
<input type="checkbox"/>	Abbott, Gudrun	2373	24	Female	724 New Portberg	Cornerberg	TX	78660	(282)132-	olivereichmann@harris.com	Jun 21, 2019
<input type="checkbox"/>	Abbott, Wilber	737		Female	268 Port Turnelland	Islebury	TX	78660	(824)160-	othomarks@vandervort.io	N/A
<input type="checkbox"/>	Abbott, Kaylah	766	17	Male	6620 East Loopfort	Prairieiland	TX	78664	668-802-3	almeoreilly@erluke.com	Apr 23, 2018
<input type="checkbox"/>	Abernathy, Emilio	1673	33	Female	8335 Lake Greendhaven	Keystad	TX	78660	1-921-177	chynahackets@reinger.net	Jan 26, 2019

**Patient Information** SE Sedrick Abbott

Info Family Employer Ledger TX Plans AR Summary Activities and Notes

**Add Reminder**

**Patient Information**

Age Gender Birthdate Status

1759225 Female N/A Active

Mobile Phone Work Phone Home Phone Email Address

4628763 115837 taureankunze...

**Overview**

Next Visit N/A \$0 Last Visit N/A \$0

Remaining Insurance \$0 Treatment Plans \$0 Scheduled \$4,500.00 Unshed

Hygiene Due N/A Lifetime Value \$0

**Add a Reminder**

Date Jan 27, 2021

Type Select option Estimate \$ \$0.00

Assignee Select option

Notes Say something about this reminder

**Add Reminder**

**Activity**

**Unscheduled Broken Appointment** Dec 28, 2020 04:55 PM  
Created by Jarvis Analytics

**Hygiene Recare** Nov 18, 2020 06:11 PM  
Created by devan

**Unscheduled Treatment** Aug 12, 2020 03:52 PM  
Created by Jarvis Analytics

**Unscheduled Treatment** Aug 26, 2020 05:29 PM  
Rescheduled by Jarvis Analytics

**Unscheduled Treatment** Aug 26, 2020 05:29 PM  
Reassigned by Jarvis Analytics

# Reminders (Bulk Reminders)

You can bulk add reminders in multiple modules, here is the example for Hygiene Recall:

1. Click the bulk check box
2. Select **"Create Reminders"**
3. Select the reminder type, the due date, and who you would like to assign them to (*the due date determines the date the Jarvis User will see this task in Jarvis*)
4. Then select **"Add"**

**Patient Portal**

Apple Refresh

Patients Reminders Performance

Additional Filters (0)

+ Add Filter Save

Reset Search Search Export CSV

<input type="checkbox"/>	Patient Name	Patient ID	Age	Gender	Address	City	State	ZIP	Work Phone	Email	First Visit Date
<input type="checkbox"/>	Abbott, Sedrick	1002		Female	565 Port Ranchmouth	Throughwayton	TX	78660	462-576-3	taureankunze@kuvalic.org	N/A
<input type="checkbox"/>	Abbott, Virginia	1073	57	Male	794 East Bypassmouth	Dividestad	TX	78660	1-848-512	chanelawindler@tromp.biz	Jun 22, 2018
<input type="checkbox"/>	Abbott, Angelo	1767	44	Female	581 Lake Portland	Lakefurt	TX	78660	465-800-7	brianablock@langworth.name	Dec 28, 2018
<input type="checkbox"/>	Abbott, Gudrun	2373	24	Female	724 New Portberg	Cornerberg	TX	78660	(282)132-	oliverichmann@harris.com	Jun 21, 2019
<input type="checkbox"/>	Abbott, Wilber	737		Female	268 Port Turnnelland	Islebury	TX	78660	(824)160-	othomarks@vandervort.io	N/A
<input type="checkbox"/>	Abbott, Kaylah	766	17	Male	6620 East Loopfort	Prairieand	TX	78664	668-802-3	almeoreilly@kerluke.com	Apr 23, 2018
<input type="checkbox"/>	Abermathy, Emilio	1873	33	Female	8335 Lake Greenhaven	Keystad	TX	78660	1-921-177	chynahackett@reinger.net	Jan 26, 2019

**Hygiene Recall**

Jun 01, 2021 - Jun 30, 2021 Apple Refresh

< Summary

Create Reminders (120) Search Export CSV

<input checked="" type="checkbox"/>	Patient Name	Patient ID	Age	Birthdate	Gender	Address	City	State	Zip
-------------------------------------	--------------	------------	-----	-----------	--------	---------	------	-------	-----

**Bulk Add Reminders** X

Select Reminder Type Select Due Date

Select a reminder type Select a due date

Assign to

Select a user

Cancel Add



# Landing page

## Welcome Demo,

You have access to **2 locations** and **8 modules**

### Locations

Search location

Flouride

Happy Tooth

### Modules

Search module



Calendar



EOD Form



Front Office



Morning  
Huddle



Patient Portal



Practice  
Potential



Solo



Tx Miner

### Announcements

#### Latest News

##### Jarvis Service Desk

Jarvis Service Desk Announcing the new Jarvis Service Desk and Knowledge Base. Watch this short video and Login at [help.jarvisanalytics.com](https://help.jarvisanalytics.com)

#### Unlock Your True Practice's Potential™

Know your numbers + Maximize Performance + Increase your ROI ↗

Your Practice Potential

## Locations

This shows the name of your location

## Dashboard Module List

Shows all modules that an individual user has access to

### Support

If you have questions or need support, visit us.

↔ [Jarvis Help Desk.](#)

Or contact us at

[support@jarvisanalytics.com](mailto:support@jarvisanalytics.com)

866-9-JARVIS (527-847)

### User Guide and Quick Links

#### Dashboard Manual PDF

Download the user manual document




#### Jarvis University


For trainings and useful articles related to Jarvis



# Aging

## Aging

 Jul 14, 2021

Apple 


Refresh

Responsible Party

By Office

By Patient


By Insurance


 Values display Guarantor balances. Individual Patient Aging values can be viewed by selecting the breakout button next to the Guarantor name.

Top 20%









Mid Tier

Bottom 20%

Include Credits 

Search 

Export CSV

Guarantor	Guarantor ID	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240
Abernathy, Ally 	2863	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0
Adams, Jalyn 	2118	\$ 107.00	\$ 0	\$ 0	\$ (28.20)	\$ 0	\$ 0	\$ 0
Altenwerth, Dallin 	2015	\$ 1.50	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jeffery 	2380	\$ 11.00	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jovan 	1881	\$ 3.00	\$ 0	\$ 0	\$ 1.50	\$ 0	\$ 0	\$ 0
Ankunding, Nayeli 	2023	\$ 0	\$ 0	\$ 0	\$ (11.00)	\$ 0	\$ 0	\$ 0
Ankunding, Sonia 	149	\$ 0	\$ 0	\$ 0	\$ (185.00)	\$ 0	\$ 0	\$ 0
Armstrong, Astrid 	3485	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

- The **Aging Module** has 4 Views
  - Responsible Party
  - By Office
  - By Patient
  - By Insurance
- Click the tiles to move between different Views

# Aging (By Responsible Party & By Office)

- The **Responsible Party View** shows all aging in each bucket by Responsible Party
- Note: This can be different than By Patient
- Note: This view is shown by guarantors

**Aging**

Jul 14, 2021 Apple Refresh

Responsible Party By Office By Patient By Insurance

Values display Guarantor balances. Individual Patient Aging values can be viewed by selecting the breakout button next to the Guarantor name.

Top 20% Mid Tier Bottom 20% Include Credits Search Export CSV

Guarantor	Guarantor ID	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240
Abernathy, Ally	2863	\$ 0	\$ 0	\$ 0	(\$ 13.20)	\$ 0	\$ 0	\$ 0
Adams, Jalyn	2118	\$ 107.00	\$ 0	\$ 0	(\$ 28.20)	\$ 0	\$ 0	\$ 0
Altenwerth, Dallin	2015	\$ 1.50	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jeffery	2380	\$ 11.00	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jovan	1881	\$ 3.00	\$ 0	\$ 0	\$ 1.50	\$ 0	\$ 0	\$ 0
Ankunding, Nayeli	2023	\$ 0	\$ 0	\$ 0	(\$ 11.00)	\$ 0	\$ 0	\$ 0
Ankunding, Sonia	149	\$ 0	\$ 0	\$ 0	(\$ 185.00)	\$ 0	\$ 0	\$ 0
Armstrong, Astrid	3485	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

Jul 14, 2021 LOCATION 4 Refresh

Responsible Party By Office By Patient By Insurance

Top 20% Mid Tier Bottom 20% Include Credits Search Export CSV

#	Location	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240	Over 365
1	Apple - Patient	\$ 139,295.72	\$ 3,119.99	\$ 3,673.67	(\$ 42,683.84)	\$ 0	\$ 0	\$ 0	\$ 0
	- Insurance	\$ 10,387.60	\$ 3,119.99	\$ 3,673.67	(\$ 42,683.84)	\$ 0	\$ 0	\$ 0	\$ 0
2	Auburn - Patient	\$ 56,346.42	\$ 973.67	\$ 376.28	(\$ 10,493.83)	\$ 0	\$ 0	\$ 0	\$ 0
	- Insurance	\$ 894.50	\$ 973.67	\$ 376.28	(\$ 10,493.83)	\$ 0	\$ 0	\$ 0	\$ 0
3	Bluetooth Dental - Patient	\$ 134,549.79	\$ 10,624.80	\$ 12,120.24	(\$ 34,636.80)	\$ 0	\$ 0	\$ 0	\$ 0
	- Insurance	\$ 9,511.66	\$ 10,624.80	\$ 12,120.24	(\$ 34,636.80)	\$ 0	\$ 0	\$ 0	\$ 0
4	Dental Floss - Patient	\$ 57,730.80	\$ 3,462.93	\$ 3,314.54	(\$ 1,314.18)	\$ 0	\$ 0	\$ 0	\$ 0
	- Insurance	\$ 61,103.98	\$ 3,462.93	\$ 3,314.54	(\$ 1,314.18)	\$ 0	\$ 0	\$ 0	\$ 0
Total:		\$ 387,922.73	\$ 18,181.39	\$ 19,484.73	(\$ 89,128.65)	\$ 0	\$ 0	\$ 0	\$ 0

- The **By Office View** shows all aging for each office sorted into various aging buckets
- Note: This is a grouped view, users will not be able to see individual patient aging, but aging for the office as a whole.

# Aging (By Patient & By Insurance)

- The **By Patient View** shows the aging per office by patient
- NOTE: This can differ from the Responsible Party View
- NOTE: these views show first the guarantor, to see the patient, they need to click the guarantor breakdown.

**Aging**

Jul 14, 2021 Apple Refresh

Responsible Party By Office **By Patient** By Insurance

Values display Guarantor balances. Individual Patient Aging values can be viewed by selecting the breakout button next to the Guarantor name.

Top 20% Mid Tier Bottom 20% Include Credits Search Export CSV

Guarantor	Guarantor ID	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240
Abernathy, Ally	2863	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0
Adams, Jalyn	2118	\$ 0	\$ 0	\$ 0	\$ (28.20)	\$ 0	\$ 0	\$ 0
Anderson, Jeffery	2380	\$ 11.00	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jovan	1881	\$ 0	\$ 0	\$ 0	\$ 1.50	\$ 0	\$ 0	\$ 0
Ankundung, Nayeli	2023	\$ 0	\$ 0	\$ 0	\$ (11.00)	\$ 0	\$ 0	\$ 0

**Aging**

Jul 14, 2021 Apple Refresh

Responsible Party By Office By Patient **By Insurance**

Values display Guarantor balances. Individual Patient Aging values can be viewed by selecting the breakout button next to the Guarantor name.


Top 20% Mid Tier Bottom 20% Select Insurance Company Get Report Search Export CSV

Guarantor	Guarantor ID	Insurance	Current	Over 30	Over 60	Over 90	Over 120
Adams, Jalyn	2118	Friesen-Crooks Group	\$ 107.00	\$ 0	\$ 0	\$ 0	\$ 0
Altenwerth, Dallin	2015	Muller and Sons LLC	\$ 1.50	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jovan	1881	Oberbrunner, Zieme and Sanford Inc	\$ 3.00	\$ 0	\$ 0	\$ 0	\$ 0
Auer, Adam	2200	Hodkiewicz, Ritchie and Walsh Group	\$ 234.00	\$ 0	\$ 0	\$ 0	\$ 0
Auer, Adella	1004	Boyer-Kohler LLC	\$ 10.00	\$ 0	\$ 0	\$ 0	\$ 0


- The **By Insurance View** shows the Insurance aging per patient.
- NOTE: This view is unavailable with Dentrix Core and Dentrix Ascend.
- NOTE: Eaglesoft locations will display all insurance balances as current

# Aging (Historical Aging & Credits Filter)

**Aging**

 Jul 14, 2021 Apple Refresh

**Responsible Party** By Office By Patient By Insurance

 Values display Guarantor balances. Individual Patient Aging values can be viewed by selecting the breakout button next to the Guarantor name.

Top 20% Mid Tier Bottom 20%

Include Credits  Export CSV

Guarantor	Guarantor ID	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240
Abernathy, Ally	2863	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0
Adams, Jalyn	2118	\$ 107.00	\$ 0	\$ 0	\$ (28.20)	\$ 0	\$ 0	\$ 0
Altenwerth, Dallin	2015	\$ 1.50	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jeffery	2380	\$ 11.00	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Anderson, Jovan	1881	\$ 3.00	\$ 0	\$ 0	\$ 1.50	\$ 0	\$ 0	\$ 0
Ankunding, Nayeli	2023	\$ 0	\$ 0	\$ 0	\$ (11.00)	\$ 0	\$ 0	\$ 0
Ankunding, Sonia	149	\$ 0	\$ 0	\$ 0	\$ (185.00)	\$ 0	\$ 0	\$ 0
Armstrong, Astrid	3485	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

- Use the **Date Picker** to select a day in the past to view that day's aging (Note: Dentrix Core and EagleSoft will reflect historical aging only from the date that Jarvis was installed and moving forward.)
- NOTE: This will only work for days that had the Jarvis Connector installed.
- Use the **Credits Filter** to choose to
  - **Include Credits**
  - **Exclude Credits**
  - Or see **Only Credits**

**Jarvis Tip!**  
Use the *credits toggle* to view your aging report however you would like

# Aging

Guarantor Information

AB

Abernathy, Ally

Age

39

Gender

Male

Address

261 Port Mountainsview , Fordborough, TX, 78660

Mobile Phone

7667937

Work Phone

573277

Home Phone

3185627

Email Address

ebonybogan@goldner.info

Snapshot AR Breakdown

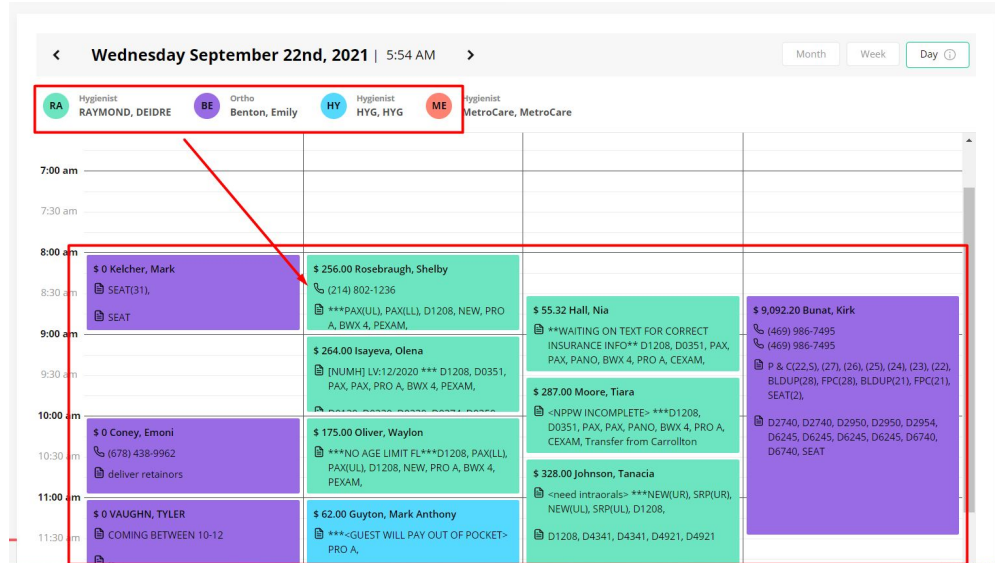
Include Credits ▼

Patient Name	Current	Over 30	Over 60	Over 90	Over 120	Over 180	Over 240	Over 365	Credit Balance	Con
Abernathy, Ally	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Insurance	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Patient Total	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Insurance Total	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Total	\$ 0	\$ 0	\$ 0	\$ (13.20)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

To view a patient's AR Summary select their name and the **Guarantor Information Card** will populate

- Select the patient name to view the patient modal card and create reminder
- Use this screen to view the balances this patient has and what aging bucket they are attributed to.

# Calendar



The **Calendar Module** allows users to view the appointment books for all their locations without having to log in to each locations individual Practice Management System. The providers are color coordinated with their appointments.

- The Appointments module has 3 View types:
  - Day
  - Week
  - Month

As a note: You can use the **Active Columns Only** toggle to show only operatories with appointments in them.

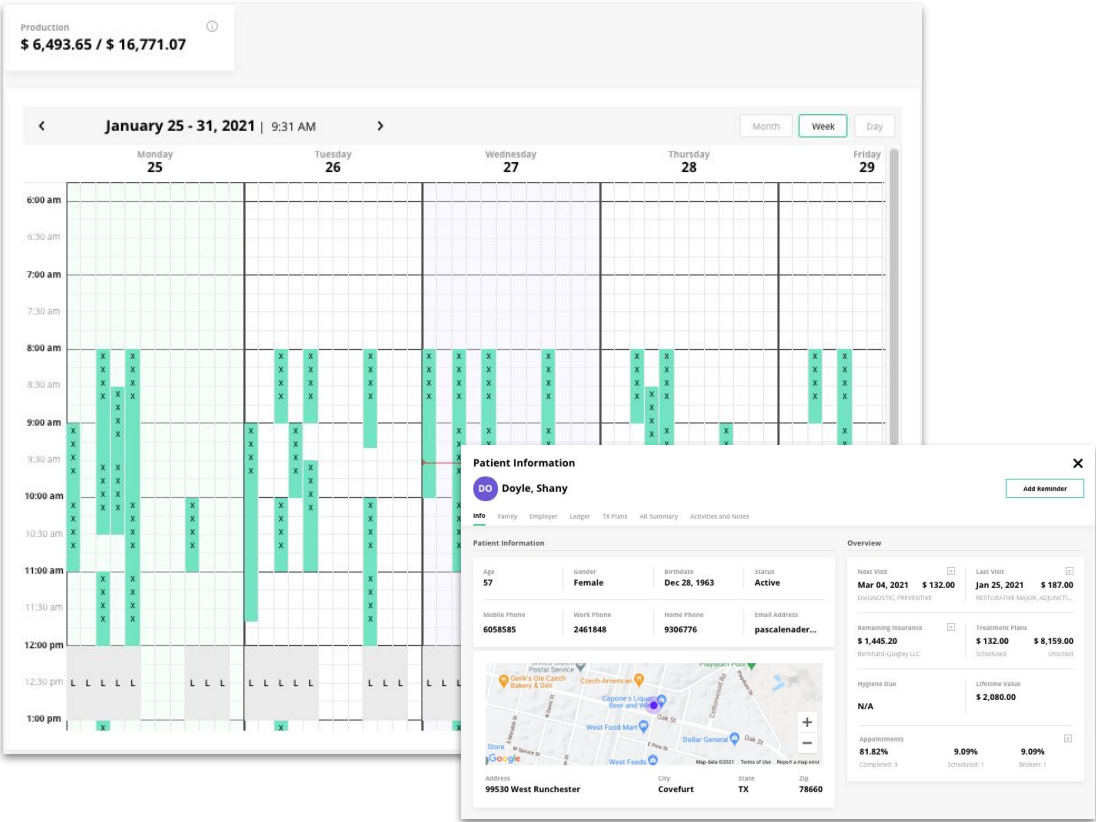
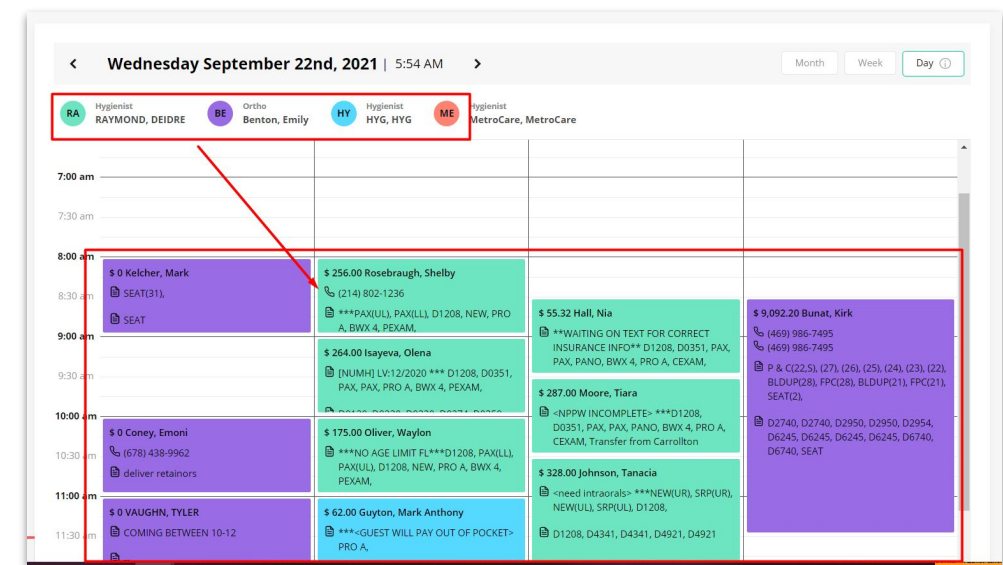
**Jarvis Tip!**  
Use this module as a way to coach your front office staff and see gaps in your schedule. Use the Scheduled Production amount to schedule to goal.



# Calendar (day and week)

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

At the top left of the calendar you will find there the Actual Production/ Scheduled Production.



The calendar displays your reservations for the selected week. Click on each event/ appointment to provide a patient information modal



# Calendar (month)

- The month view displays your monthly events and reservations.
- Sort the reservations by location using the "Location" dropdown above.
- Change to Month, Week or Day view by clicking the button at the top right of the calendar.

At the top of the Month view, you will see Monthly totals and Selected Range Totals. The view displays:

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

**Jarvis Tip!**  
The blue info bar helps provide clarifying statements to better understand the Calendar Module.

Monthly Totals		Selected Range Totals			
Scheduled Amount	Scheduled New Patients	Goal	Appointments	New Patients	Production
\$ 112,067.20	78	\$ 600,000.00	411	50	\$ 88,343.59

Info: Click and drag to select date range for selected range totals

September 2021   1:55 PM						
Month Week Day						
Su	Mo	Tu	We	Th	Fr	Sa
			1 Appointments 13 New Pts: 6 Sched: \$ 3,929.14 Goal: \$ 40,000.00 Prod: \$ 4,390.24	2 Appointments 18 New Pts: 2 Sched: \$ 4,923.50 Goal: \$ 40,000.00 Prod: \$ 584.00	3 Appointments 21 New Pts: 5 Sched: \$ 10,597.26 Goal: \$ 40,000.00 Prod: \$ 11,481.75	4 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 0 Prod: \$ 0
5 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 0 Prod: \$ 0	6 Appointments 23 New Pts: 2 Sched: \$ 3,152.76 Goal: \$ 0 Prod: \$ 3,289.84	7 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 30,000.00 Prod: \$ (2,275.14)	8 Appointments 12 New Pts: 3 Sched: \$ 491.50 Goal: \$ 30,000.00 Prod: \$ 803.80	9 Appointments 19 New Pts: 2 Sched: \$ 5,767.20 Goal: \$ 30,000.00 Prod: \$ 3,975.20	10 Appointments 10 New Pts: 1 Sched: \$ 2,307.00 Goal: \$ 30,000.00 Prod: \$ 1,884.20	11 Appointments 17 New Pts: 3 Sched: \$ 9,261.00 Goal: \$ 0 Prod: \$ 9,454.30
12 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 0 Prod: \$ 0	13 Appointments 13 New Pts: 0 Sched: \$ 8,517.82 Goal: \$ 24,000.00 Prod: \$ 8,570.08	14 Appointments 25 New Pts: 3 Sched: \$ 5,065.25 Goal: \$ 24,000.00 Prod: \$ 3,791.85	15 Appointments 22 New Pts: 6 Sched: \$ 9,734.52 Goal: \$ 24,000.00 Prod: \$ 9,994.16	16 Appointments 21 New Pts: 5 Sched: \$ 3,890.51 Goal: \$ 24,000.00 Prod: \$ 4,983.66	17 Appointments 22 New Pts: 3 Sched: \$ 10,337.00 Goal: \$ 24,000.00 Prod: \$ 10,296.00	18 Appointments 18 New Pts: 4 Sched: \$ 10,464.00 Goal: \$ 0 Prod: \$ 10,624.00
19 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 0 Prod: \$ 0	20 Appointments 14 New Pts: 3 Sched: \$ 2,560.66 Goal: \$ 24,000.00 Prod: \$ 2,665.42	21 Appointments 18 New Pts: 2 Sched: \$ 3,666.20 Goal: \$ 24,000.00 Prod: \$ 3,627.20	22 Appointments 18 New Pts: 0 Sched: \$ 3,019.21 Goal: \$ 24,000.00 Prod: \$ 2,01.03	23 Appointments 17 New Pts: 0 Sched: \$ 3,670.00 Goal: \$ 24,000.00 Prod: \$ 0	24 Appointments 13 New Pts: 0 Sched: \$ 3,459.00 Goal: \$ 24,000.00 Prod: \$ 0	25 Appointments 3 New Pts: 0 Sched: \$ 396.00 Goal: \$ 0 Prod: \$ 0
26 Appointments 0 New Pts: 0 Sched: \$ 0 Goal: \$ 0 Prod: \$ 0	27 Appointments 15 New Pts: 0 Sched: \$ 3,297.00 Goal: \$ 30,000.00 Prod: \$ 0	28 Appointments 29 New Pts: 0 Sched: \$ 95.00 Goal: \$ 30,000.00 Prod: \$ 0	29 Appointments 19 New Pts: 0 Sched: \$ 2,395.67 Goal: \$ 30,000.00 Prod: \$ 0	30 Appointments 11 New Pts: 0 Sched: \$ 1,070.00 Goal: \$ 30,000.00 Prod: \$ 0		

# Calendar (appointment details)

Calendar

Jul 01, 2021 - Jul 13, 2021 Apple Refresh

Appointments Calendar Scheduling **Appointment Details**

Provider(s) Select a Provider Procedure(s) Select a Procedure Patient(s) Select a Patient Appointment Status Select an Appointment Status

Top 20% Mid Tier Bottom 20% Search Export CSV

Location	Appointment Date	Appointment Time	Appointment Duration	Operator Name	Appointment Status	Patient Name	Patient Age	Patient
Apple	Jul 03, 2021	1:00 PM	60.00	RECALL/PM	Patient	Evalyn Ortiz	18	9366127
Apple	Jul 08, 2021	11:00 AM	60.00	RECALL/PM	Patient	Javier Harvey	27	5722107
Apple	Jul 03, 2021	2:00 PM	60.00	RECALL/PM	Patient	Domenick Bogisch	41	327117
Apple	Jul 01, 2021	9:00 AM	60.00	Neither	Neither	Alexandria Luetggen	16	1958103
Apple	Jul 01, 2021	10:00 AM	60.00	Failed	Failed	Hosea Turner	13	376649
Apple	Jul 04, 2021	2:30 PM	60.00	NP/SRP	Patient	Lee Hayes	14	1712911
Apple	Jul 04, 2021	3:10 PM	60.00	RECALL/PM	Patient	Dandre Crona	17	2666750
Apple	Jul 01, 2021	11:00 AM	60.00	RECALL/PM	Patient	Bruce Waters	14	7095245

Appointments Calendar Scheduling **Appointment Details**

Provider(s) Select a Provider Procedure(s) Select a Procedure Patient(s) Select a Patient Appointment Status Select an Appointment Status

You can use the advanced filters; Provider(s), Procedure(s), Patient(s), and Appointment status, at the top of the table to view specific data.

The **Appointment Details tab** shows the appointment details by appointment date. this includes broken appointments.

This tab displays the below details:

- Location
- Appointment date
- Appointment time
- Appointment duration
- Operator name
- Appointment status
- Patient name
- Patient age
- Patient phone
- Patient type
- Appointment Notes
- Confirmation status
- Provider Name
- Procedure codes
- Production
- Primary Insurance Carrier
- Secondary Insurance Carrier
- Referral Source
- Unsched Tx \$
- Last Visit Date

# Configurations

The **Configuration Module** allows customizations to be made to your platform. These include Provider Types, Goals, Calendar Settings and KPIs. You can also create groups like Brands, Regions and Vintages in order to group Locations and apply Advanced Filters. Typically only a few designated Users have access to Configuration.

## Configuration

Users Locations Modules Email Settings Providers Goals Reminders Calendar Code Mapping KPIs RCM User Mapping EOD Settings Huddle Settings Snapshot Settings

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

All Users beta

Add UsersExport CSV

All LocationsAll ModulesAll RolesSearchReset Filters

<input type="checkbox"/>	Name	Location Access	Location Access Group	Module Access	Module Access Group	Email	Role	IP Address	First Login	Last Login
<input type="checkbox"/>	Aaron Bugarske	Apple, Auburn +10	Group 1	EOD Form, KPIs +19	Executives	aaronb@jettyunited.com	Subscriber	--	--	--
<input type="checkbox"/>	adaley	Apple, Auburn +10	--	Dashboard, Financials +19	--	Amber.Daley@henryscheinone.com	Subscriber	50.205.195.88	Jun 08, 2021	Sep 08, 2021
<input type="checkbox"/>	Adrienne Bova	Happy Tooth, Jarvis +1	--	Dashboard, Financials +17	--	growthremedy@gmail.com	Subscriber	--	--	--
<input type="checkbox"/>	AIT	Apple, Auburn +11	--	Dashboard, Financials +20	--	ai@tester.com	Subscriber	3.140.92.215	Oct 11, 2021	Oct 11, 2021
<input type="checkbox"/>	Alen Hasanbegovic	Apple, Auburn +10	--	Dashboard, Financials +13	--	alen@familydentistrygroupa.com	Subscriber	--	--	--
<input type="checkbox"/>	Alex	Apple, Auburn +10	--	Dashboard, Financials +16	--	officemanager@usadental.com	Subscriber	73.173.94.6	Sep 15, 2021	Sep 15, 2021
<input type="checkbox"/>	amabry	Apple, Auburn +10	--	Dashboard, Financials	--	aaron@tridentgeneraldentistry.com	Subscriber	--	--	--

# Configurations (Basic Settings)

Toggle the filters you want to enable across all modules “**ON**”.

## Configuration

**Basic** Users Locations Modules Email Settings Providers Goals Reminders Calendar Code Mapping KPIs RCM User Mapping EOD Settings Huddle Settings Snapshot Settings Advanced

**Info:** If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

### Basic Settings

#### Display Production Type

Filter	Enabled
Gross Production	<input checked="" type="checkbox"/>
Net Production	<input checked="" type="checkbox"/>
Adjustment	<input checked="" type="checkbox"/>

#### Dashboard Visits Display

Filter	Enabled
Total New Patient Tile	<input checked="" type="checkbox"/>
New Patient Visits Figures Graph	<input checked="" type="checkbox"/>
Patient Visits Figures Graph	<input checked="" type="checkbox"/>

# Configurations (Users)

Users tab allows the Manager role users to manage, delete and create other user accounts.

## Configuration

[Users](#) [Locations](#) [Modules](#) [Email Settings](#) [Providers](#) [Goals](#) [Reminders](#) [Calendar](#) [Code Mapping](#) [KPIs](#) [RCM User Mapping](#) [EOD Settings](#) [Huddle Settings](#) [Snapshot Settings](#)

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

### All Users beta

All Locations

All Modules

All Roles

Search

Reset Filters

Add Users

Export CSV

Name	ss Group	Email	Role	IP Address	First Login	Last Login	Created By	Created At	Updated At	Actions
Aaron Bugarske		aaronb@jettyunited.com	Subscriber	--	--	--	--	Jan 27, 2022	Jan 27, 2022	...
adaley		Amber.Daley@henryscheinone.com	Subscriber	50.205.195.88	Jun 08, 2021	Sep 08, 2021	--	Jun 07, 2021	--	...
Adrienne Bova		growthremedy@gmail.com	Subscriber	--	--	--	--	Oct 27, 2021	Oct 27, 2021	...
AIT		ai@tester.com	Subscriber	3.140.92.215	Oct 11, 2021	Oct 11, 2021	--	Oct 11, 2021	Oct 11, 2021	...
Alen Hasanbegovic		alen@familydentistrygroupa.com	Subscriber	--	--	--	--	Oct 08, 2021	Oct 08, 2021	...
Alex		officemanager@usadental.com	Subscriber	73.173.94.6	Sep 15, 2021	Sep 15, 2021	--	Sep 15, 2021	Sep 15, 2021	...
amabry		aaron@tridentgeneraldentistry.com	Subscriber	--	--	--	--	Jul 08, 2021	--	...

-  Edit User
-  Assign Locations
-  Assign Modules
-  Impersonate User
-  Delete User
-  Send Login Link
-  Activity Log

# Configurations (Users)

User can create or add new user/s via upload csv file for bulk creation, or using the Add Single User functionality by clicking the **"Add Users"** button.

Add Users

Export CSV

Created AtUpdated AtActions

< Add Users

Add Single User

Download example .csv

Drag and Drop files here to upload

Browse Computer

Supported document files:  
.csv

users-example

login	name	display_name	email	password	role	job_title
john.doe	John Doe	John	john.doe@email.com	Secret123!	subscriber	front office
jane.doe	Jane Doe	Jane Doe	jane.doe7@email.com	Secret123!	subscriber	other
max.doe	Max Doe	Maximus	max.doe7@email.com	Secret123!	manager	other

< Add User

Username / Login

Name

Display Name

Email

Job Title

Role

Security

Password

Confirm Password

Generate Password

Cancel

Save User

# Configurations (Users)

To provision location/s to a user/s, select the user from the left side then click “**Assign Location**”.

All Users beta

Assign Locations

Assign Modules

Delete Users

Add Users

Export CSV

All Locations

All Modules

All Roles

Search

Reset Filters

<input type="checkbox"/>	Name	Location Access	Location Access Group	Module Access	Module Access Group	Email	Role	IP Address
<input checked="" type="checkbox"/>	Aaron Bugarske	Apple, Auburn +10	Group 1	EOD Form, KPIs +19	Executives	aaronb@jettyunited.com	Subscriber	--
<input type="checkbox"/>	adaley	Apple, Auburn +10	--	Dashboard, Financials +19	--	Amber.Daley@henryscheinone.com	Subscriber	50.205.195.88
<input type="checkbox"/>	Adrienne Bova	Happy Tooth, Jarvis +1	--	Dashboard, Financials +17	--	growthremedy@gmail.com	Subscriber	--

Assign Locations

Cancel

Assign Locations

Aaron Bugarske

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

Select location access group

Group 1

All Locations

Search

<input checked="" type="checkbox"/>	Name	Id	Db Name	Software Type	Software Version	Created At
<input type="checkbox"/>	Unsupported PMS 1	20	unsupportedpms	unsupported-pms	--	Jan 11, 2021
<input checked="" type="checkbox"/>	Washington	16	anoncedarpark_new	eaglesoft	19	May 19, 2020
<input checked="" type="checkbox"/>	Jarvis	15	anonsouthlamar	eaglesoft	19	May 19, 2020
<input checked="" type="checkbox"/>	Happy Tooth	14	anonroundrock	eaglesoft	19	May 19, 2020

Select the location/s you want to provision for that user then click “**Assign Location**”.

You can use the group access dropdown if you already have created a group access.

# Configurations (Users)

To provision location/s to a user/s, select the user from the left side then click **"Assign Location"**.

All Users beta

Assign Locations

☒ Assign Modules

Delete Users

Add Users

Export CSV

All Locations

All Modules

All Roles

Search

Reset Filters

<input type="checkbox"/>	Name	Location Access	Location Access Group	Module Access	Module Access Group	Email	Role	IP Address
<input checked="" type="checkbox"/>	Aaron Bugarske	Apple, Auburn +10	Group 1	EOD Form, KPIs +19	Executives	aaronb@jettyunited.com	Subscriber	--
<input type="checkbox"/>	adaley	Apple, Auburn +10	--	Dashboard, Financials +19	--	Amber.Daley@henryscheinone.com	Subscriber	50.205.195.88
<input type="checkbox"/>	Adrienne Bova	Happy Tooth, Jarvis +1	--	Dashboard, Financials +17	--	growthremedy@gmail.com	Subscriber	--

Assign Modules

Cancel

Assign Modules

Aaron Bugarske

Dashboard

Financials

Operations

EOD Form

KPIs

Tx Miner

Hygiene Recall

Waterfall

Morning Huddle

Aging

Front Office

Snapshot

RCM

Deposit Slip

Practice Potential

Procedures

Account Receivables

Jarvis Payroll

Locations and Users

Marketing Analytics

Jarvis Ascend Financial Reports

Executives

All Modules

☐

Title

ID

☒

Dashboard

dashboard

☒

Financials

financial

☒

Calendar

appointments

Select the module/s you want to provision for that user then click **"Assign Location"**.

You can use the group access dropdown if you already have created a group access.



# Configurations (Locations)

In Locations view there are three sub views: **All Locations**, **Filters**, and **Access Groups**.

## Configuration

Users**Locations**ModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot Settings

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

All LocationsFiltersAccess Groups

All Locations beta

Add Locations

<input type="checkbox"/>	Name		Id	Brand	Region	Vintage	Director	Regional Manager	Crm Id	Db Name	Software Type	Software Version
<input type="checkbox"/>	Ascend DXA		28	Select brand	Select region	Select vintage	Select director	Select regional m	28	--	dentrix_ascend	--
<input type="checkbox"/>	Unsupported PMS 1		20	Select brand	Select region	Select vintage	Select director	Select regional m	20	unsupportedpms	unsupported-pms	--
<input type="checkbox"/>	Washington		16	Dental Haven	North East	2020	Paul McCartney	Select regional m	ID1057	anoncedarpark_new	eaglesoft	19
<input type="checkbox"/>	Jarvis		15	Smiley	North East	2019	Paul McCartney	Select regional m	ID1052	anonsouthlamar	eaglesoft	19
<input type="checkbox"/>	Happy Tooth		14	Smiley	North East	2015	Paul McCartney	Select regional m	CSH02	anonroundrock	eaglesoft	19

# Configurations (Locations)

- Under **All locations view**, here the user can manage/update/add new locations to Jarvis.
- To edit/delete a location, you can use the action menu that can be found in the right most of the table.

**Configuration**

Users **Locations** Modules Email Settings Providers Goals Reminders Calendar Code Mapping KPIs RCM User Mapping EOD Settings Huddle Settings Snapshot Settings




*Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.*

All Locations Filters Access Groups

**All Locations** beta Add Locations

Search

<input type="checkbox"/>	Name	ID	Brand	Region	Vintage	Director	Regional Manager	Crm Id	Db Name	Software Type	Software Version
<input type="checkbox"/>	Ascend DXA	28	Select brand	Select region	Select vintage	Select director	Select regional m	28	--	dentrix_ascend	--
<input type="checkbox"/>	Unsupported PMS 1	20	Select brand	Select region	Select vintage	Select director	Select regional m	20	unsupportedpms	unsupported-pms	--
<input type="checkbox"/>	Washington	16	Dental Haven	North East	2020	Paul McCartney	Select regional m	ID1057	anoncedarpark_new	eaglesoft	19
<input type="checkbox"/>	Jarvis	15	Smiley	North East	2019	Paul McCartney	Select regional m	ID1052	anonsouthlamar	eaglesoft	19
<input type="checkbox"/>	Happy Tooth	14	Smiley	North East	2015	Paul McCartney	Select regional m	CSH02	anonroundrock	eaglesoft	19

Updated At	Actions
Jan 12, 2021	
May 18, 2021	 Edit Location
May 18, 2021	 Delete Location

# Configurations (Locations)

- Under **Filters view**, here the user can enable and manage the advanced filters: Brands, Regions, Vintage, Directors, Regional Managers, and Board Doctors.

The screenshot displays the Jarvis Analytics interface for the 'Locations' configuration. The top navigation bar includes tabs for Users, Locations (selected), Modules, Email Settings, Providers, Goals, Reminders, Calendar, Code Mapping, KPIs, RCM User Mapping, EOD Settings, Huddle Settings, and Snapshot Settings. Below the navigation bar, a blue info banner states: 'Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.'

The main content area is titled 'Location Filters beta' and features three tabs: 'All Locations', 'Filters' (selected and highlighted with a red box), and 'Access Groups'. Below the tabs, there is a 'Brands' dropdown menu, a 'Search names' input field with a magnifying glass icon, and a 'Disabled' toggle switch. A green arrow points from the 'Brands' dropdown in the main interface to a separate dropdown menu on the left, which lists the following options: Brands, Regions, Vintages, Directors, Regional Managers, and Board Doctors.

To the right of the search and toggle controls is a green 'New Brand' button. Below these controls is a table with the following columns: ID, Name, Profile ID, and Actions. The table contains five rows of data:

ID	Name	Profile ID	Actions
1	Flossy	1	...
19	Smiley	Test	...
23	Dental Haven		...
26	Eagle Mountain		...
29	Ashmore		...

A green arrow points from the 'Actions' column of the first row (Flossy) to a callout box on the right. This callout box contains two options: 'Update brand' (with a pencil icon) and 'Delete brand' (with a trash can icon).

# Configurations (Locations)

- Under **Access Groups view**, here the user create and manage Location Access groups.

Users

Locations

Modules

Email Settings

Providers

Goals

Reminders

Calendar

Code Mapping

KPIs

RCM User Mapping

EOD Settings

Huddle Settings

Snapshot Settings

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

All Locations

Filters

Access Groups

Access Groups

Access Groups enables you to only allow specific IP addresses access to select modules. Any user's IP address that is not in the access group list is prevented from accessing the selected module. Each group can be applied to one or more modules.

Search

Q

ID	Name	# of IP Address	Attached Items	Date Created	Date Updated	Actions
35	Peace	0	2	2022-02-25 18:20:35	2022-02-25 18:20:35	...
32	Group 1	0	13	2022-01-12 19:16:56	2022-01-12 19:16:56	...

Add Access Group

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

< Add Access Group

Cancel

Submit

Access Group Name

Sample Group 1

Description

Apple

Assign locations

<input type="checkbox"/>	Name	ID	Db Name	Software Type	Software Version
<input checked="" type="checkbox"/>	Apple	3	anonplugervillenew	eaglesoft	19
<input type="checkbox"/>	Auburn	5	anonbelterraneew	eaglesoft	19
<input type="checkbox"/>	Bluetooth Dental	6	anoncedarpark	eaglesoft	19
<input type="checkbox"/>	Dental Floss	8	anoncentralaustin	eaglesoft	19
<input type="checkbox"/>	Dental Haven	9	anonbutte	eaglesoft	19

Edit Access Group

Delete Access Group

# Configurations (Modules)

- Under **Access Groups view**, here the user create and manage Module Access groups. User can also enable to only allow specific IP addresses access to selected modules.

Users

Locations

Modules

Email Settings

Providers

Goals

Reminders

Calendar

Code Mapping

KPIs

RCM User Mapping

EOD Settings

Huddle Settings

Snapshot Settings

Info

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Access Groups

## Access Groups

Add Access Group

**Access Groups** enables you to only allow specific IP addresses access to select modules. Any user's IP address that is not in the access group list is prevented from accessing the selected module. Each group can be applied to one or more modules.

Search

Q

ID	Name	# of IP Address	Attached Items	Date Created	Date Updated	Actions
36	Sandbox	0	17	2022-03-01 02:39:45	2022-03-01 02:39:45	...
34	Executives	0	3	2022-01-13 20:53:00	2022-02-10 12:48:59	...
33	Office Managers	0	7	2022-01-13 16:10:25	2022-01-13 16:10:25	...

### Add Access Group

[Cancel](#) [Submit](#)

Access Group Name



Description

Enter IP Address  
 [Add IP Address](#)

---

Assign modules

<input type="checkbox"/>	Title	ID	Cap	Class	Type
<input checked="" type="checkbox"/>	Dashboard	dashboard	dashboard_cap	geo-to-frame	web
<input checked="" type="checkbox"/>	Financial	financial	financial_cap	geo-to-scaner	web
<input checked="" type="checkbox"/>	Calendar	appointments	appointment_cap	geo-to-date	web
<input type="checkbox"/>	Operations	operations	operation_cap	geo-to-point-to-line	web
<input type="checkbox"/>	Provider Portal	provider_portal	provider_portal_cap	geo-to-point-to-line	web
<input type="checkbox"/>	EOD Item	eod	eod_cap	geo-to-switch	web
<input type="checkbox"/>	VNA	kits	vna_cap	geo-to-users	web
<input type="checkbox"/>	TV Server	tv_server	tvserver_cap	geo-to-map	web
<input type="checkbox"/>	Patient Portal	patient_portal	patient_portal_cap	geo-to-users	web
<input type="checkbox"/>	Hygiene Recall	hygiene_recall	hygiene_recall_cap	geo-to-users	web
<input type="checkbox"/>	Waterfall	waterfall	waterfall_cap	geo-to-server	web
<input type="checkbox"/>	Monitoring Module	monitoring_module	monitoring_module_cap	geo-to-date	web
<input type="checkbox"/>	APNG	apng	apng_cap	geo-to-date	web
<input type="checkbox"/>	Front Office	front_office	front_office_cap	geo-to-users	web
<input type="checkbox"/>	Configuration	configuration	configuration_cap	geo-to-web	web
<input type="checkbox"/>	Snapshot	snapshot	snapshot_cap	geo-to-server	web
<input type="checkbox"/>	CRM	crm	crm_cap	geo-to-server	web
<input type="checkbox"/>	Depend Link	depend_link	depend_link_cap	geo-to-date	web
<input type="checkbox"/>	My Metric Dashboard	my_metric_dashboard	my_metric_cap	geo-to-date	web
<input type="checkbox"/>	EOD User	eod_user	eod_user_cap	geo-to-switch	web
<input type="checkbox"/>	Practice Feedback	practice_feedback	practice_feedback_cap	geo-to-server	web
<input type="checkbox"/>	Procedures	procedures	procedures_cap	geo-to-point-to-line	web

-  Edit Access Group
-  Delete Access Group

# Configurations (Email Settings)

- **Emails Settings** allows you to set your End of Day and Morning Huddle Emails to send to specific addresses. This allows users to not have to fill in the email recipients every time they send an email.
- User can use bulk Add Recipient functionality by selecting multiple office then click "**Bulk Add Recipients**".

## Configuration

UsersLocationsModules**Email Settings**ProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot Settings

**Info:** If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

**Info:** Due to the latency of pulling data, emails may not be sent exactly on the selected sending time. We are ensuring that the data we are pulling is as real-time and current as possible. EOD and Morning Huddle will also be sent at the same time selected.

Search Locations

(2) Bulk Add Recipients

Respond to sender Email: email@mail.com

Save

<input type="checkbox"/>	ID	Location	Recipients		Automate		Email Sending Time (CST)	Action
			Email To	Email Cc	EOD	Morning Huddle		
<input checked="" type="checkbox"/>	3	Apple	melissa@jarvisanalytics.c...	melissa@jarvisanalytics.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00 PM	...
<input checked="" type="checkbox"/>	5	Auburn	melissa@jarvisanalytics.c...	--	<input type="checkbox"/>	<input type="checkbox"/>	08:30 PM	...
<input type="checkbox"/>	6	Bluetooth Dental	melissa@jarvisanalytics.c...	--	<input type="checkbox"/>	<input type="checkbox"/>	10:00 PM	...
<input type="checkbox"/>	8	Dental Floor			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00 PM	...

Edit Details

### Update Recipients

**Info:** Set the default email addresses in TO/CC fields for all emails per location.

**Emails To:**

email@mail.com

Add

demo@gmail.com

**Emails CC:**

email@mail.com

Add

cc@demo.com

**Email Sending Time (CST)**

06:00 PM

Cancel

Save

# Configurations (Provider Settings)

- Provider Settings** allows you to view your doctors, hygienist, and specialties. You can also view 3 year production totals, their location as well as their provider IDs. Here, you are able to toggle a provider to add or remove a specific line of business.

## Apply Default Settings

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

## Clear Settings

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

Providers can only be assigned to one Line of Business.

This will assign the provider to that line of business appearing Filters, KPI Module and the End of Day.

New Providers must be manually assigned.

MainOperationsFinancialsConfigurationDashboardCalendarRCMPatient PortalAdmin

Configuration

UsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot Settings

Info: If you have other jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

LocationStatusVisibility

AppleAllAllSearch

Clear SettingsApply Default SettingsExport CSV

Enable	Provider	Location	Provider ID	Last Active	3yr Production	General	Hygiene	Oral Surgery	Clear Aligners	Perio	Pedo	Endo	Ortho	Prosthe	Other
<input checked="" type="checkbox"/>	Bartell, Dovie	Apple	GM	2021-11-29	\$80,785	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Berge, Octavia	Apple	TH	2021-08-29	\$28	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Block, Donny	Apple	SP		\$0	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Boehm, Gisselle	Apple	OSP		\$0	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cassin, Cortez	Apple	OO	2022-02-20	\$210,681	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cassin, Vicenta	Apple	AAD	2021-09-15	\$716	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Damore, Enos	Apple	DRJ		\$0	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Fadel, Garth	Apple	KK	2019-05-12	\$12,086	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Goodwin, Jacquelyn	Apple	SC	2021-12-14	\$4,582	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Greenfelder, Garland	Apple	OOS	2022-01-09	\$2,700	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

Items per page101-10 of 40 items

1 of 4 pages

# Configurations (Goals)

- In **General Goals** view, you can set each office goals: Production, Collection, PTS Visits, NPT Visits.
- You can select which goal setting you prefer "**Daily** or **monthly**" in under Goal Type dropdown.

### Configuration

UsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot Settings

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

GoalsSpecialty

LocationAll Locations

MonthMarch 2022

Goal TypeMonthly

EditImport

	ID	Office Name	Gross Production	Net Production	Collection	Pts Visits	Npt Visits	Ini Bonding	Hyg Visits	Saved
<input checked="" type="checkbox"/>	3	Apple	\$ 200,000.00	\$ 150,000.00	\$ 100,000.00	250	100	0	0	✓
<input type="checkbox"/>	5	Auburn	\$ 0.00	\$ 0.00	\$ 0.00	0	0	0	0	✓
<input type="checkbox"/>	6	Bluetooth Dental	\$ 0.00	\$ 0.00	\$ 0.00	0	0	0	0	✓
<input type="checkbox"/>	8	Dental Floss	\$ 0.00	\$ 0.00	\$ 0.00	0	0	0	0	✓
<input type="checkbox"/>	9	Dental Haven	\$ 0.00	\$ 0.00	\$ 0.00	0	0	0	0	✓

### Update Goals

Production\$ 0.00

Collection\$ 0.00

Patient Visits0

New Patient Visits0

Ini Bonding0

Hygiene Visits0

CancelConfirm



# Configurations (Goals)

- You can bulk upload goals using csv file by clicking the “**Import**” button. Download the sample template to easily input multiple office goals.

**Info:** If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Goals Specialty

Location: All Locations | Month: March 2022 | Goal Type: Monthly

**Import**

<input type="checkbox"/>	ID	Office Name	Gross Production	Net Production	Collection	Pts Visits	Npt Visits	Ini B
<input type="checkbox"/>	3	Apple	\$ 200,000.00	\$ 150,000.00	\$ 100,000.00	250	100	
<input type="checkbox"/>	5	Auburn	\$ 0.00	\$ 0.00	\$ 0.00	0	0	

**Import Goals** March 2022 Cancel

**Download example .csv**

Drag and Drop files here to upload

OR

**Browse Computer**

Supported document files: .csv

AutoSave Off | goals-example (1).csv | Search

	A	B	C	D	E	F	G	H	I
1	id	office	gross_production	net_production	collection	pts_visits	npt_visits	ini_bonding	hyg_visits
2	3	Happy Smiles	1	2	3	4	5	6	7
3									
4									

# Configurations (Goals)

- You can bulk upload goals using csv file by clicking the “**Import**” button. Download the sample template to easily input multiple office goals.

**Info:** If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Goals Specialty

Location: All Locations Month: March 2022 Goal Type: Monthly

**Import**

<input type="checkbox"/>	ID	Office Name	Gross Production	Net Production	Collection	Pts Visits	Npt Visits	Ini B
<input type="checkbox"/>	3	Apple	\$ 200,000.00	\$ 150,000.00	\$ 100,000.00	250	100	
<input type="checkbox"/>	5	Auburn	\$ 0.00	\$ 0.00	\$ 0.00	0	0	

**Import Goals** March 2022 Cancel

**Download example .csv**

Drag and Drop files here to upload

OR

**Browse Computer**

Supported document files: .csv

AutoSave Off goals-example (1).csv Search

	A	B	C	D	E	F	G	H	I
1	id	office	gross_production	net_production	collection	pts_visits	npt_visits	ini_bonding	hyg_visits
2	3	Happy Smiles	1	2	3	4	5	6	7
3									
4									

# Configurations (Basic Settings)

Toggle the production type you would like to see across all modules “**ON**”. This will affect the production type that is displayed across the platform where applicable.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Basic Settings

Display Production Type

Filter	Enabled
Gross Production	<div></div>
Net Production	<div></div>
Adjustment	<div></div>

For management systems that support this feature, you can turn on the PMS Writeback so Jarvis can transpose the notes back into your management system. This is located in the **Locations** tab.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

All LocationsFiltersAccess Groups

All Locationsbeta

Add Locations

Search

Name	Db Name	Software Type	Software Version	Pms Notes Writeback	Ip Address	Created At	Updated At	Actions
Unsupported PMS 1	unsupportedpms	unsupported-pms	--	<div></div>	--	Jan 11, 2021	Jan 12, 2021	...
Washington	anoncedarpark_new	eaglesoft	19	<div></div>	--	May 19, 2020	May 18, 2021	...

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# Configurations (email settings)

**Emails Settings** allows you to set your End of Day and Morning Huddle Emails to send to specific addresses. This allows users to not have to fill in the email recipients every time they send an email.

BasicUsersLocationsModules**Email Settings**ProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Info: Due to the latency of pulling data, emails may not be sent exactly on the selected sending time. We are ensuring that the data we are pulling is as real-time and current as possible. EOD and Morning Huddle will also be sent at the same time selected.

Search Locations

Respond to sender Email:

email@mail.com

Clear

Save

<input type="checkbox"/>	ID	Location	Recipients		Automate		Email Sending Time (CST)	Action
			Email To	Email Cc	EOD	Morning Huddle		
<input type="checkbox"/>	3	Apple	melissa@jarvisanalytics.com,mike.m...	melissa@jarvisanalytics.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00 PM	...
<input type="checkbox"/>	5	Auburn	melissa@jarvisanalytics.com	--	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:30 PM	...
<input type="checkbox"/>	6	Bluetooth Dental	melissa@jarvisanalytics.com	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10:00 PM	...
<input type="checkbox"/>	8	Dental Floss	--	--	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00 PM	...
<input type="checkbox"/>	9	Dental Haven	--	--	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00 PM	...

## Automation

This tab allows users to set these as automated emails. Use the toggles to set EOD and Morning Huddle to automatically send and using the “Email Sending Start Time” To choose when you would like this email to be sent.

**NOTE: For automated emails to work correctly, the Daily Schedule in Calendar Settings must be set-up. This is also not supported for DxAscend and Denticon**

## Respond To Email

Use this field to set an email you would like these emails to come from. This could be a reporting email, or your Jarvis Champions email.

# Configurations (provider settings)

**Provider Settings** allows you to view your doctors, hygienist, and specialties. You can also view 3 years production, their location as well as their provider ids. Here, you are able to toggle a provider to add or remove a specific line of business.

## Apply Default Rules

We will automatically set the Doc, Hyg, and Ortho toggles 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.

## Visible view

Lists all your active providers in your PMS. These providers can be toggled to different lines of business. They are also providers. that have not been hidden by users

## Hidden View

All other providers that are not listed in the Main tab that have been hidden by users. Hiding providers will exclude them from views like KPIs

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Location		Status	Visibility										
Apple		All	All		Search		Clear SettingsApply Default SettingsExport CSV						
Enable	Provider	Location	Provider ID	Last Active	3yr Production	General	Hygiene	Oral Surgery	Clear Aligners	Perio	Pedo	Endo	
<div></div>	Bartell, Dovie	Apple	GM	2022-01-24	\$80,785	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	
<div></div>	Berge, Octavia	Apple	TH	2021-10-24	\$28	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	
<div></div>	Block, Donny	Apple	SP		\$0	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	
<div></div>	Boehm, Gisselle	Apple	OSP		\$0	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	
<div></div>	Cassin, Cortez	Apple	OO	2022-04-17	\$210,681	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	
<div></div>	Cassin, Vicenta	Apple	AAD	2021-11-10	\$716	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	

# Configurations (office goals)

In **General Goals** view, you can set each office goals: Production, Collection, PTS Visits, NPT Visits.

You can toggle which goal setting you prefer “**Daily** or **monthly**”.

The Action button can be clicked to manually enter goal amounts, or you can click **UPLOAD CSV** for a template that can be completed for Bulk Upload. Be sure to change the Location to ALL to enter goals for multiple locations at once.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

GoalsSpecialty

LocationMonthGoal Type

All Locations

April 2022

Monthly

Download CSV

Upload CSV

Office Name	Gross Production	Net Production	Collection	Pts Visits	Npt Visits	Ini Bonding	Hyg Visits	Saved
Apple	\$ 100,000.00	\$ 75,000.00	\$ 75,000.00	300	40	1	150	

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# Configurations (office goals)

In **Specialty Goals** view, you can set each office goals: OS, INV, PER, PED, END, and ORT.

You can toggle which goal setting you prefer “**Daily** or **Monthly**”. This should match the goal value you are entering.  
The Action button can be clicked to manually enter goal amounts, or you can click UPLOAD CSV for a template that can be completed for Bulk Upload. Be sure to change the Location to ALL to enter goals for multiple locations at once.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

GoalsSpecialty

LocationMonthGoal Type

All Locations

▼

Calendar

April 2022

Monthly

▼

Download CSV

Upload CSV

<input type="checkbox"/>	ID	Office Name	Oral Surgery	Clear Aligners	Perio	Pedo	Endo	Ortho	Prosth
<input type="checkbox"/>	3	Apple <div></div>	\$ 10,000.00	\$ 0.00	\$ 5,000.00	\$ 0.00	\$ 3,000.00	\$ 0.00	\$ 0.00

# Configurations (calendar settings)

In **Calendar Settings** tab, you can set the **Daily Schedule**, **Worked Hours** and **Closed Days**.

Calendar settings are important, as they contribute to calculating Daily Goals and dictate which days you receive the Automated Emails on.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Daily ScheduleWork HoursClosed Days

April 2022All Locations

<input type="checkbox"/>	ID	Location	Schedule	
			Day	1st Half2nd Half
	3	Apple	Monday	08:00 - 12:0014:00 - 17:00
			Tuesday	08:00 - 12:0014:00 - 17:00
<input type="checkbox"/>			Wednesday	08:00 - 12:0014:00 - 17:00
			Thursday	08:00 - 12:0014:00 - 17:00
			Friday	08:00 - 12:0014:00 - 17:00
				Make Default

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# Configurations (calendar settings)

In **Daily Schedule** tab, you can set the days open and the start time and end time of the day. You can use this module to set a default schedule

Basic

Users

Locations

Modules

Email Settings

Providers

Goals

Reminders

Calendar

Code Mapping

KPIs

RCM User Mapping

EOD Settings

Huddle Settings

Snapshot Settings

Advanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Daily Schedule

Work Hours

Closed Days

April 2022

All Locations

<input type="checkbox"/>	ID	Location	Schedule			Make Default
			Day	1st Half	2nd Half	
<input type="checkbox"/>	3	Apple	Monday	08:00 <input type="text"/> - 12:00 <input type="text"/>	14:00 <input type="text"/> - 17:00 <input type="text"/>	<input checked="" type="checkbox"/>
			Tuesday	08:00 <input type="text"/> - 12:00 <input type="text"/>	14:00 <input type="text"/> - 17:00 <input type="text"/>	
			Wednesday	08:00 <input type="text"/> - 12:00 <input type="text"/>	14:00 <input type="text"/> - 17:00 <input type="text"/>	
			Thursday	08:00 <input type="text"/> - 12:00 <input type="text"/>	14:00 <input type="text"/> - 17:00 <input type="text"/>	
			Friday	08:00 <input type="text"/> - 12:00 <input type="text"/>	14:00 <input type="text"/> - 17:00 <input type="text"/>	

# Configurations (calendar settings)

In **Worked Hours** tab, the table will auto populate with the providers that has LOB is being set at PMS Settings tab. Here you can input the total worked hours of each providers per working day. When hours are entered here, these values will be used to calculate the Production Per Hour KPI.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Daily ScheduleWork HoursClosed Days

April 2022

Apple

Search Providers

				Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu
				01	02	03	04	05	06	07	08	09	10	11	12
AAD	Cassin, Vicenta	Apple	99.5	1	2	3	23	23	23.5	24					

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# Configurations (calendar settings)

In **Closed Days** tab, users can manually close days that are normally toggled open in the daily schedule tab. For example, if the office is usually opened on a Friday, but one Friday is a Holiday, this will allow Jarvis to view this day as closed, and

Basic Users Locations Modules Email Settings Providers Goals Reminders **Calendar** Code Mapping KPIs RCM User Mapping EOD Settings Huddle Settings Snapshot Settings Advanced

**Info:** If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Daily Schedule Work Hours **Closed Days**

April 2022 Apple Search closed day + Add Closed Day

Name	Office	Description	Date	
Closed Day	Apple		2022-04-04	...

To use this function:

- Select *Add Closed Day*
- Fill out the closed day information
- Select *Save*
- Now the Closed day has been added!

As a note, this is for each month on the calendar

# Configurations (Code Mapping)

**Code Mapping** allows users to map together duplicate Service, Payor, Provider and Referrer Codes.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

ServicesPayorsReferrersProvidersPayment Types

Search

Upload CSV

Add Item

<input type="checkbox"/>	ID	Base Code	Type	Service	Code	Action
<input type="checkbox"/>	1	01110	Cleaning	Prophy	1110	...
<input type="checkbox"/>	2	5894	PROSTHODONTICS, REMOVABLE	Wax Rim Try In	5894	...
<input type="checkbox"/>	3	5894	PROSTHODONTICS, REMOVABLE	Wax Rim Try In	WAX	...
<input type="checkbox"/>	4	All on 4	Al on 4	All on 4	D0603	...
<input type="checkbox"/>	5	All on 4	Al on 4	All on 4	D9110	...
<input type="checkbox"/>	6	All on 4	Al on 4	All on 4	D9120	...
<input type="checkbox"/>	7	All on 4	Al on 4	All on 4	D9210	...

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# Configurations (Code Mapping)

In **Services** view, you can merge similar services.

Merging Services will combine the values associated with that Service code.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

ServicesPayorsReferrersProvidersPayment Types

Search

Upload CSVAdd Item

<input type="checkbox"/>	ID	Base Code	Type	Service	Code	Action
<input type="checkbox"/>	1	01110	Cleaning	Prophy	1110	...
<input type="checkbox"/>	2	5894	PROSTHODONTICS, REMOVABLE	Wax Rim Try In	5894	...
<input type="checkbox"/>	3	5894	PROSTHODONTICS, REMOVABLE	Wax Rim Try In	WAX	...
<input type="checkbox"/>	4	All on 4	AI on 4	All on 4	D0603	...
<input type="checkbox"/>	5	All on 4	AI on 4	All on 4	D9110	...
<input type="checkbox"/>	6	All on 4	AI on 4	All on 4	D9120	...
<input type="checkbox"/>	7	All on 4	AI on 4	All on 4	D9210	...

# Configurations (Code Mapping)

In **Payors** view, you can merge similar payors and set their Uniform name.

On this view, you can also bulk select items to add or delete them to a uniform name.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Customize and control Google Chrome. Update is available.

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

ServicesPayorsReferrersProvidersPayment Types

Search

Upload CSVAdd Item

<input type="checkbox"/>	ID	Payor Name	Uniform Name	Action
<input type="checkbox"/>	4	Blick, Shields and Becker and Sons - 67	Blick Insurance	...
<input type="checkbox"/>	5	Blick-Kuhic Group - 33	Blick Insurance	...
<input type="checkbox"/>	6	Brown, Kilback and Mueller Group - 5	metlife	...
<input type="checkbox"/>	7	Buckridge, Kuhlman and Ferry Group - 9	metlife	...
<input type="checkbox"/>	8	Champlin-Stanton Inc - 72	metlife	...
<input type="checkbox"/>	9	Pouros Inc LLC - 83		...
<input type="checkbox"/>	10	Abshire Group Group - 83	Abshire Group	...

# Configurations (Code Mapping)

In **Providers** view, you can merge similar providers and set their Uniform name. This allows Providers with Multiple Provider IDs in the same location to have consolidated Metrics.

On this view, you can also bulk select items to add or delete them to a uniform name.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

ServicesPayorsReferrersProvidersPayment Types

Search

Upload CSV

Add Item

<input type="checkbox"/>	Provider ID	Provider Name	Location	Uniform Name	Action
<input type="checkbox"/>	JBN	Zboncak, Abigayle	Apple	Novella Zboncak	...
<input type="checkbox"/>	RDA	Zboncak, Novella	Apple	Novella Zboncak	...
<input type="checkbox"/>	JBN	Zboncak, Abigayle	Apple	Novella Zboncak	...

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# Configurations (Code Mapping)

In **Referrers** view, you can merge similar Referral Sources and set their Uniform name.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

ServicesPayorsReferrersProvidersPayment Types

Search

Upload CSVAdd Item

<input type="checkbox"/>	ID	Referrer Name	Uniform Name	Action
<input type="checkbox"/>	1	PPO INSURANCE	Insurance	<div></div>
<input type="checkbox"/>	2	-		<div></div>
<input type="checkbox"/>	3	Brody Baumbach - 56		<div></div>
<input type="checkbox"/>	4	Keshawn Cassin - 119		<div></div>



# Configurations (reminders)

In the **Reminders** tab, you can create Automated Reminders for your front office team.

These Reminders can be assigned to one or more individuals, and will populate based on the parameters you set here.

Use the Toggles to activate the types of Reminders you would like to create.

Username that you enter for each Reminder type will only receive Reminders related to Locations that they are provisioned with.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

Enable	Reminder Type	Assign To	Interval	Action
<input checked="" type="checkbox"/>	Appointment Confirmation	melissa, david, skuehn, awalker	10	...
<input checked="" type="checkbox"/>	Unscheduled Broken Appointment	chester, maroulis, david, melissa, corey	10	...
<input checked="" type="checkbox"/>	Unscheduled Treatment		5	...
<input checked="" type="checkbox"/>	Hygiene Recare	melissa	5	...
<input type="checkbox"/>	Past Due Account	david, vicjarvis, melissa		...
<input checked="" type="checkbox"/>	Past Due Claims	maroulis, vicjarvis, mesasixAdmin	25	...

# Configurations (KPI goals)

In the **KPI Goals** tab, users can program the goals for the KPIs in the Front Office Module.

Type into the Goal field to update the Goal for each KPI for each Location.

Use the drop down menus to change the location and the KPI type.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

MainProvidersSpecialtySpecialty Providers

AppleHygieneSearch KPIs

Kpi		Description	Goal	Actions
Perio %	Enabled	The number of perio appointments (D4341, D4342, D4910, D4346, D4355) divided by the sum of all hygiene appointments (D1110, D1120, D4341, D4342, D4910, D4346, D4355) multiplied by 100.	65	...
# of Fluoride app. per day	Enabled	The sum of unique patients that received a Fluoride application (1206, 1208) divided by the number of Hygiene Working Days.	5	...
		The total production filtered by Hygienist and divided by the number of working days (any day with production within the	1000	...
		nd divided by the number of working days by provider (days with > \$0 in Gross excludes adjustments and deleted entries).	1500	...
		er divided by the total number of Hygiene Patient Visits.	500	...
		rnish Applications per day divided by the number of production days filtered by	2	...

# Configurations (EOD settings)

**EOD Settings** allows users to configure your End of Day module to suit an organization's needs.

Use the **Enabled** toggle to enable and disable metrics

Use the **Locked** metric to lock these metrics such that they cannot be edited in the EOD module

The screenshot shows the Jarvis Analytics interface with the 'EOD Settings' tab selected. A navigation bar at the top includes tabs for Basic, Users, Locations, Modules, Email Settings, Providers, Goals, Reminders, Calendar, Code Mapping, KPIs, RCM User Mapping, EOD Settings (active), Huddle Settings, Snapshot Settings, and Advanced. Below the navigation bar, a blue banner contains a message: 'Customize and control Google Chrome. Update is available.' and 'When browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.' The main content area is titled 'Basics' and includes sub-tabs for Provider List, Month-To-Date, Office Goals, and Booked Production. A table lists various metrics with 'Enabled' and 'Locked' toggle switches.

Filter	Enabled	Locked
Number of unscheduled treatment calls made today	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Booked production	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case acceptance (%)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Daily collections	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do all patients have recall reservation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Endo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Configurations (huddle settings)

**Huddle Settings** allows users to configure their Morning Huddle Module to suit the needs of their organization.

Use the **Enabled** toggles to enable and disable the metrics you would like to display in the Morning Huddle Module.

You will need to configure each column (Yesterday, Today, Tomorrow) with the Metrics you would like to see on your huddle.

BasicUsersLocationsModulesEmail SettingsProvidersGoalsRemindersCalendarCode MappingKPIsRCM User MappingEOD SettingsHuddle SettingsSnapshot SettingsAdvanced

Info: If you have other Jarvis browser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

YesterdayTodayTomorrow

Filter	Enabled
Yesterday's Production (gross)	<div></div>
Goal	<div></div>
Yesterday's Production (net)	<div></div>
Yesterday's Collection	<div></div>
Patient Co-pay Collection (%)	<div></div>
Production Per Patient	<div></div>

JARVIS  
ANALYTICS

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# Configurations (Snapshot settings)

**Snapshot Settings** allows users to configure the Snapshot module and create a daily operations report that has an organization's most important metrics.

Use the **Enabled** toggles to enable and disable the metrics you would like to display in the Snapshot Module.

Keep in mind the loading performance of the Module is directly related to how many Metrics are enabled.

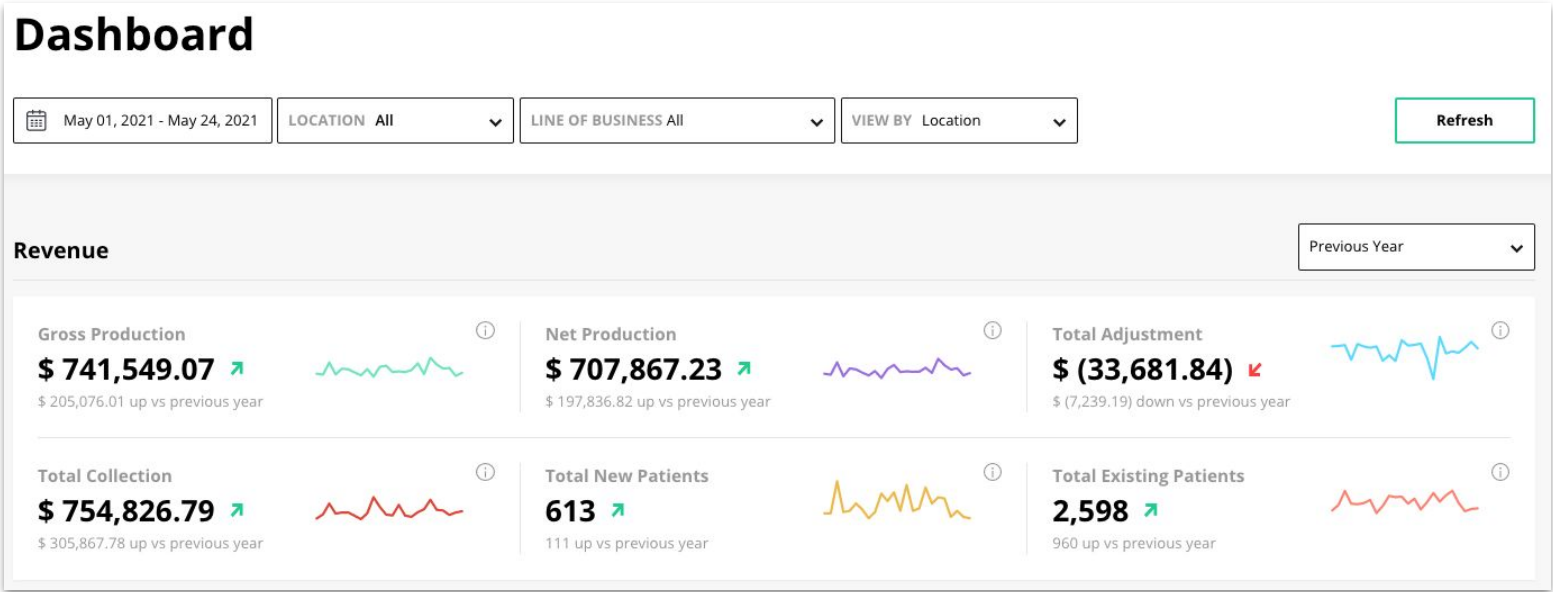
We recommend selecting your Top 10 Metrics to display for best performance.

Filter	Enabled
Actual + Scheduled Production	<input checked="" type="checkbox"/>
Booked less Net Prod	<input type="checkbox"/>
Booked less Goal	<input type="checkbox"/>
Adjustments	<input checked="" type="checkbox"/>
General Production	<input type="checkbox"/>
Gross Production	<input checked="" type="checkbox"/>
Insurance Collections	<input checked="" type="checkbox"/>
Invisalign Production	<input type="checkbox"/>

# Dashboard

The **Dashboard Module** summarizes data for all of your locations. This module has various views and ways you can filter your data including

- By date
- By location
- By Line of Business
- and By Brand or Region
  - This view allows you to compare brands and regions against each other



## Total Gross Production

The total gross production for all locations you have access to.

## Total Net Production

The total net production for all locations you have access to.

## Total Adjustments

The total adjustments for all locations you have access to.

## Total Collection

The total collection for all locations you have access to.

## Total New Patients

The total new patients for all locations you have access to.

## Total Existing Patients

The total existing patients for all locations you have access to.

# Dashboard (financial per location)



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

As you hover over the bar graph, the figures for the date range and location is displayed.

Organizations with multiple locations can use the scroll bar on the bottom of the graph to scroll between locations.

# Dashboard

The **New Patient Visit Figures and Patient Visit Figures** graph displays the adjustment, collection, gross, and net production for each location.

As you hover over the bar graph, the figures for the date range and location is displayed.





# Dashboard

Average Production Per Patient

Export CSV

#	Location	Net Production
1	eTeeth	\$ 468.38
2	Apple	\$ 341.44
3	Flouride	\$ 334.21
4	Bluetooth Dental	\$ 301.26
5	Good Year	\$ 256.19
6	Dental Haven	\$ 255.14
7	Auburn	\$ 249.30
8	FreshBreath	\$ 249.30
9	Jarvis	\$ 248.05

The **Average Production Per Patient** table above displays the average production per patient per location.

Provider Performance By Location

Export CSV

Search

Sort

Location

Search

Select sort

All

Total Gross Production

Total Net Production

Total Collection

Total Adjustment

\$ 564,065.87

\$ 534,574.76

\$ 581,481.86

\$ (29,491.11)

1

RO

Doctor

Robel, Aracely

Total Gross Production

Total Net Production

Total Collection

Total Adjustment

\$ 49,037.66

\$ 45,823.70

\$ 44,943.53

\$ (3,213.96)

2

LA

Hygiene

Larkin, Shakira

Total Gross Production

Total Net Production

Total Collection

Total Adjustment

\$ 8,580.81

\$ 8,077.70

\$ 7,544.88

\$ (503.11)

3

TR

Doctor

Tremblay, Macie

Total Gross Production

Total Net Production

Total Collection

Total Adjustment

\$ 6,025.38

\$ 5,970.58

\$ 7,130.68

\$ (54.80)

The **Providers** table lists all your providers with their actual production within the date range selected. You can also search for a specific provider by typing their name in the search bar.

Jarvis Tip!  
Use this breakdown icon to see the Provider Modal Card and individual provider statistics

# Dashboard (provider modal card)

Provider Information

RO

Robel, Aracely

Info

Production

Visits

TX Accepted

Provider Information

Age

N/A

Gender

Female

Specialty

Doctor

Email Address

N/A

Address

--

City

--

State

--

Zip

--

Overview

Production

\$ 65,147.59

Avg. Production / Day

\$ 3,619.31

Production / Patient Visit

\$ 288.26

Accepted TX Plan

6.23%

Patient Visits

226

New Patient Visits

39



When you click on the provider name, this modal will populate. It will provide more detailed report regarding the provider you selected.



You can navigate through the tabs in the modal



The Overview tab will give key provider metrics

# Dashboard (Location Utilization)



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

Hover over the graphs data for more specific information.

Click the graph and the provider information modal will pop up for more information

# EOD module

The **EOD Module** allows users to generate and End of Day Report. Though this has the ability to be automated, it can also be sent manually. As a reminder, this module can be configured in *EOD Settings* in **Configurations**

## EOD Form

Sep 22, 2021

Apple

Refresh

Before generating and sending a report, please check sync percentages first to ensure figures are correct.

Export CSV

End of Day Form

Location

Apple

Date

September 22, 2021

Was the office open today?

☒ Yes

☐ No

Overall

Booked Production

\$102,726.26

Daily Net Production

\$201.03

Daily Gross Production

\$201.03

Office Scheduled VS Goal (monthly)

17.12%

Ortho Production

\$0.00

Oral Surgery Production

\$136.24

Adjustments

\$0.00

Daily Collection

\$0.00

Number of Providers

2

Office Adjusted Daily Production (ADP)

\$201.03

No Show

0

Same Day Treatment

\$0.00

Booked Production

This Week

\$16,771.07

Next Week

\$16,653.52

Next Month

\$40,164.87

Month To Date

Office MTD Adjust Production VS Goal

0.00%

Office MTD Collections VS Goal

14.81%

Gross Production

Sync Percentage

Apple

Status:

Last Sync: 8 months ago

Version History

No Data Available

## Hygienists

Hygienist 1

Larkin, Shakira - SH

Production

\$505.76

+

Add Hygienist

# of Unsched Treatment Calls Made Today

0

Required

Do All Patients Have Recall Appointments?

☒ Yes

☐ No

## Comments

This data is generated straight from our DB records

Preview

Submit

At the bottom of the module, selecting the preview button will show a preview of the EOD Email.

The Submit button will allow users to submit this report via email

JARVIS  
ANALYTICS

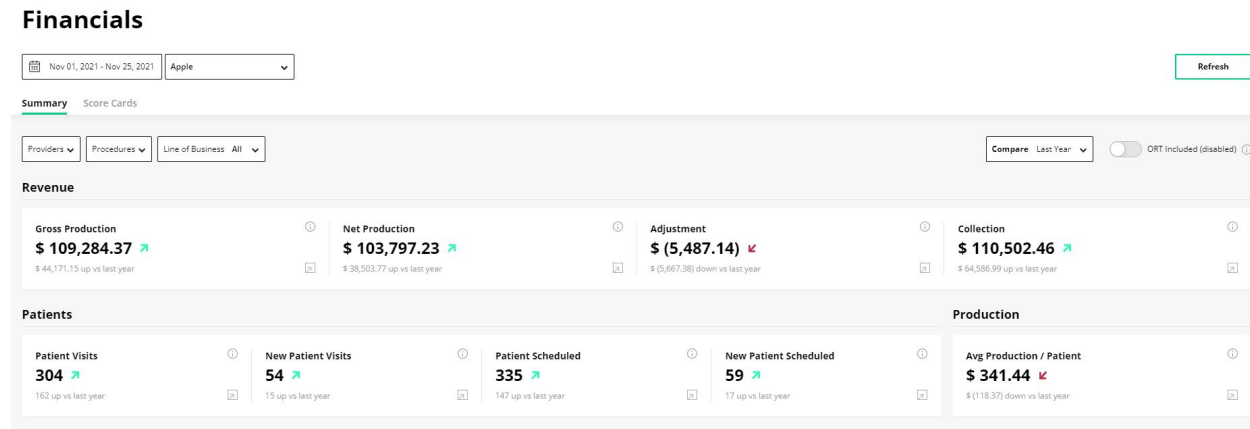
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# Financials Module

The **Financials Module** shows detailed data points on a single office level. The metrics displayed on this module are metrics like:

- Total Gross Production
- Total Net Production
- Total Adjustments
- Total Payments / Collections
- Patient Visits
- New Patient Visits
- Patient Scheduled
- New Patient Scheduled
- Average Production per patient



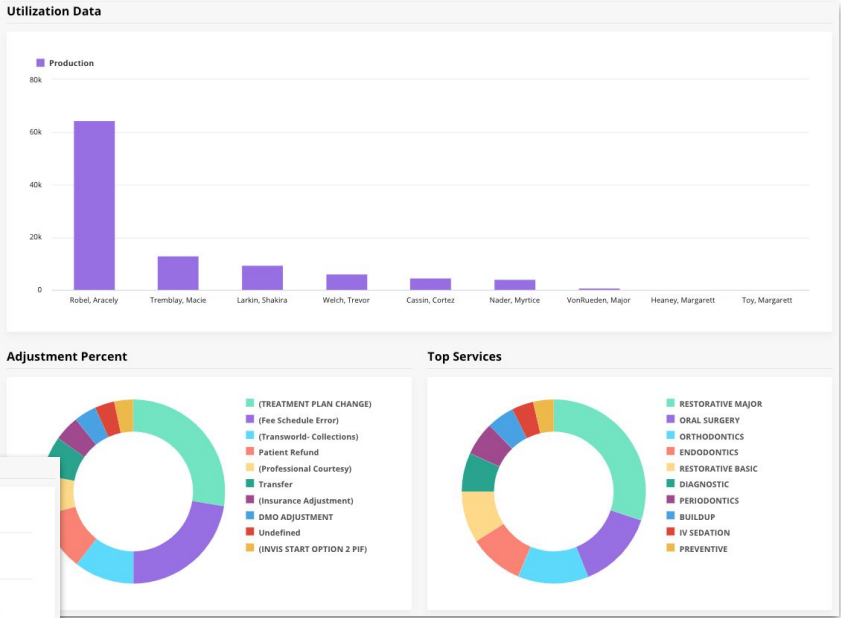
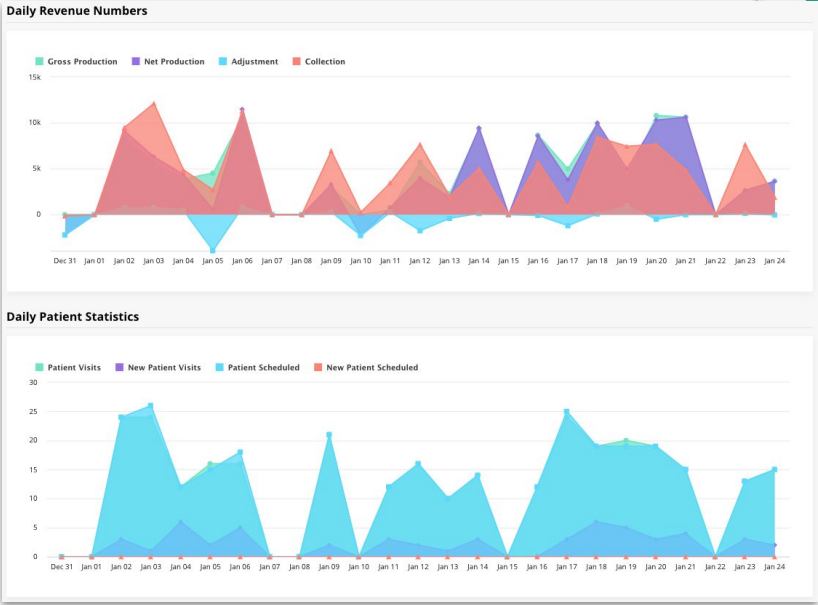
This module also has the same “Trend Arrows” that are seen in other modules. In this module, they allow users to see how they are trending compared to last year.

# Financials Module

The **Utilization data** table shows the utilization data per provider and their associated location(s). Hover over the graph for more details.

The **Adjustment Percent** table shows the top adjustment types by percentage.

The **Top Services** table shows the top services by percentage.



The **Daily Revenue Numbers** graph shows the daily financials data for: Adjustments, Collection, Production, and Gross production

The **Daily Patients Statistics** graph shows New and Returning patients for the specified date range.

# Financials Module

If you would like to see your **Financial Report for your whole organization** per location,select “**ALL**” in the location dropdown. Here, you can see the list of locations with their Ortho production, collection, adjustments, patients seen, new patients seen, patients scheduled, new patients scheduled and, average production per patient.

Financials

Jan 01, 2021 - Jan 25, 2021Apple

Refresh

SummaryScore Cards

ProvidersProcedures

BrandAll

RegionAll

All Locations (1)

All Clear

ORT Disabled

Revenue

Gross Production

\$ 109,083.34

\$ 34,615.10 up vs last year

Patients

Patient Visits

302

151 up vs last year

Jan 01, 2021 - Jan 25, 2021LOCATION: All

Refresh

SummaryScore Cards

Top 20%Mid TierBottom 20%

SearchExport CSV

Location	Gross Production	Net Production	Adjustment	Collection	Patient Visits	New Patient Visits	Patient Scheduled	New Patient Scheduled	Avg Production / Patient
Good Year	\$ 65,975.65	\$ 62,854.40	\$ (3,121.25)	\$ 64,793.22	239	61	250	0	\$ 262.99
Apple	\$ 109,083.34	\$ 101,385.79	\$ (7,697.55)	\$ 110,361.66	302	54	305	0	\$ 355.71
FreshBreath	\$ 55,151.19	\$ 52,375.88	\$ (2,775.31)	\$ 64,266.16	215	48	212	1	\$ 260.61
Happy Tooth	\$ 76,480.05	\$ 68,411.04	\$ (8,069.01)	\$ 86,258.54	230	51	233	0	\$ 302.66
Auburn	\$ 55,151.19	\$ 52,375.88	\$ (2,775.31)	\$ 64,368.16	215	48	212	1	\$ 240.61
Jarvis	\$ 43,084.08	\$ 47,074.84	\$ 3,990.76	\$ 64,367.17	167	71	177	0	\$ 251.34
Dental Haven	\$ 42,216.30	\$ 38,727.16	\$ (3,489.14)	\$ 49,841.81	153	42	142	0	\$ 253.12
Florida	\$ 43,189.38	\$ 38,568.36	\$ (4,621.02)	\$ 65,143.28	124	35	127	0	\$ 311.04
Dental Floss	\$ 38,207.08	\$ 37,024.44	\$ (1,182.64)	\$ 61,103.52	220	42	230	1	\$ 172.38
Bluetooth Dental	\$ 114,409.38	\$ 114,201.32	\$ (208.06)	\$ 102,777.32	388	76	388	0	\$ 294.33
Washington	\$ 52,183.95	\$ 49,452.18	\$ (2,731.77)	\$ 73,327.98	372	74	374	0	\$ 240.46
of eath	\$ 62,188.40	\$ 62,180.89	\$ (7.51)	\$ 61,944.11	138	55	137	0	\$ 450.59
Avg:	\$ 65,944.13	\$ 63,127.68	\$ (2,816.45)	\$ 65,056.84	232	55	232	0	\$ 276.85
Total:	\$ 795,328.59	\$ 767,532.18	\$ (27,796.41)	\$ 828,482.13	2,763	487	2,767	3	\$ 3,302.23

Items per page12 of 12 items

## Financials

Sep 01, 2021 - Sep 22, 2021Apple

Refresh

SummaryScore Cards

ProvidersProceduresLine of BusinessAll

CompareLast Year

ORT Included (disabled)

To remove Ortho provider data from the view, toggle the **ORT Disabled** to **ORT Enabled**.

ProvidersProceduresLine of BusinessAll

Revenue

Gross Production

\$ 201.03

\$ (390.97) down vs last year

Net Production

\$ 201.03

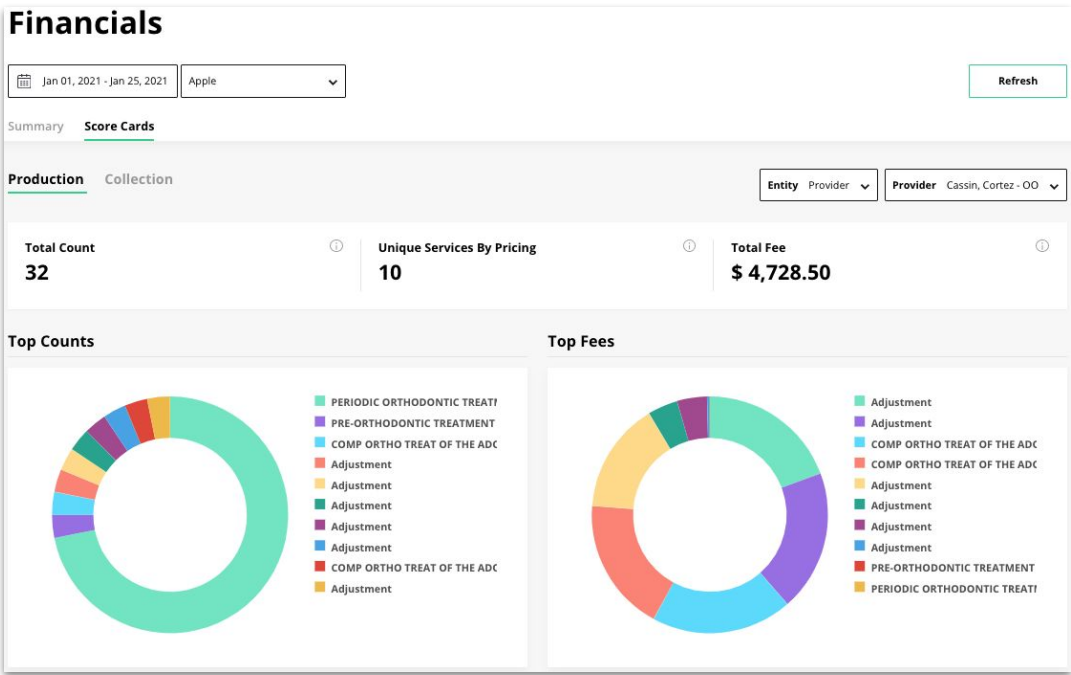
\$ (440.97)

Hovering over the (i) icon will show the definition of the metric being displayed

Clicking on the breakout button will show a breakdown of that metric.

# Financials Module

You can click **Scorecards** tab to reveal detailed information regarding Services, Production and Collection by Provider. This includes your Top 10 Services by Count and Fee for each Provider within the date range chosen.



Top 20% Mid Tier Bottom 20% Financials KPI - Score Cards

Search

Export CSV

Provider	Service	Service Code	Count	Service Fee	Total Production
Larkin, Shakira	PROPHYLAXIS-ADULT	D1110	4	\$ 1.50	\$ 6.00
Robel, Aracely	CROWN-PORCELAIN/CERAMIC SUBSTRATE	D2740	1	\$ 1,001.00	\$ 1,001.00
Robel, Aracely	PERIODIC ORAL EVALUATION	D0120	4	\$ 28.85	\$ 115.40
Robel, Aracely	PROPHYLAXIS-CHILD	D1120	6	\$ 40.00	\$ 240.00
Robel, Aracely	SURGICAL REMOVAL OF ERUPTED TOOTH	D7210	2	\$ 82.00	\$ 164.00
Robel, Aracely	CORE BUILDUP, INCLUDING ANY PINS	D2950	3	\$ 133.00	\$ 399.00
Robel, Aracely	RESIN-BASED COMPOSITE-TWO SURFACE, POST.	D3392	1	\$ 150.00	\$ 150.00
Robel, Aracely	Delive Denture	DEL	1	\$ 0	\$ 0
Robel, Aracely	BICUSPID (EX. FINAL RESTORATION)	D3320	1	\$ 734.00	\$ 734.00
Robel, Aracely	SEAT CROWN	SEAT	31	\$ 0	\$ 0
Avg:			2		\$ 207.59
Totals:			1,247		\$ 103,797.23

Items per page 20

1-20 of 500 items

1 of 25 pages

Use the services table to see each of the procedures performed by this provider in the given date range

Jarvis Tip!  
Use this to audit your schedule and make sure the right codes are being charged to the right provider!



# Front office

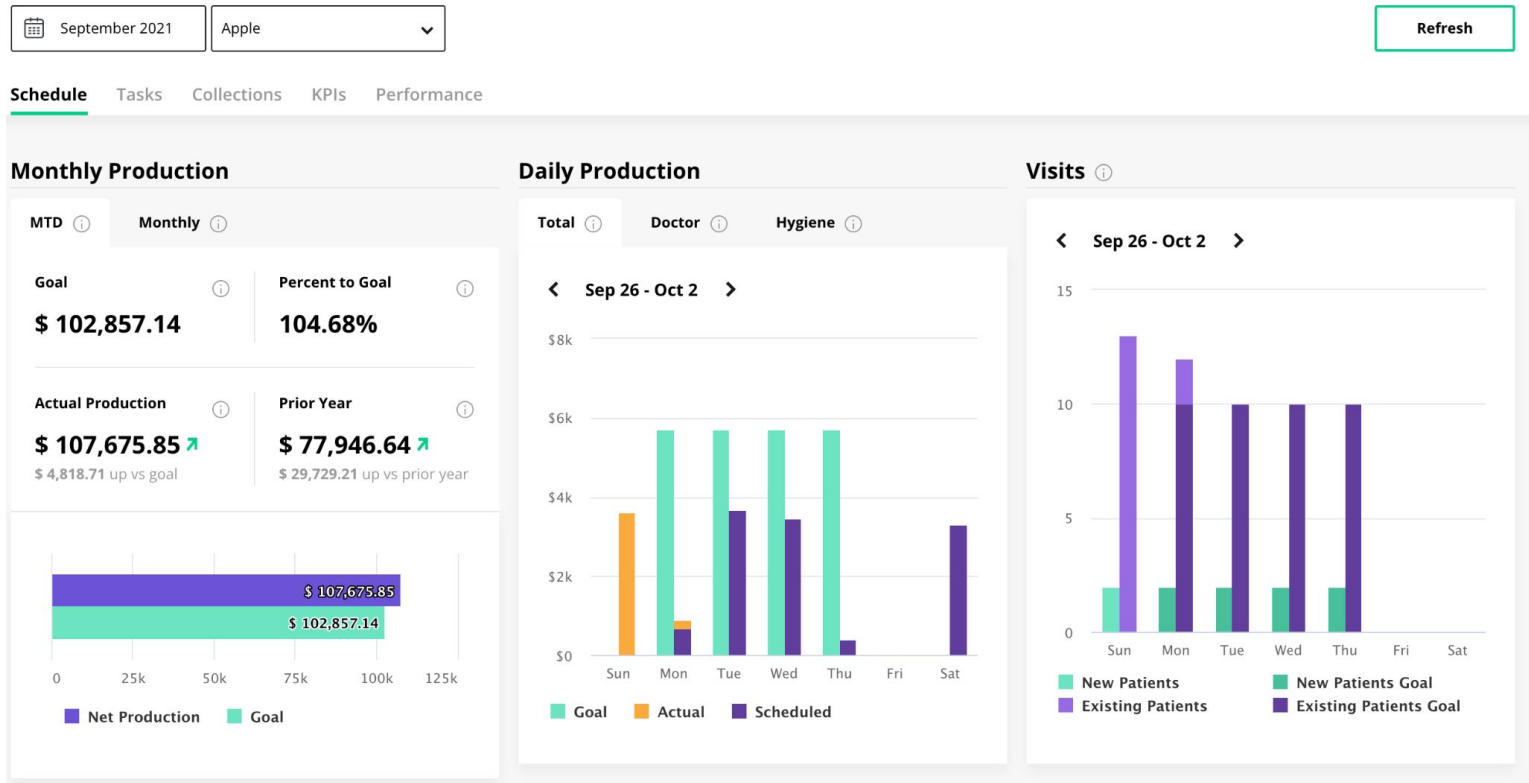
The **Front Office Module** empowers front office users to maximize their day.

Use this module to:

- Streamline front office operations
- Track goals
- Create more efficient workflows

Use the date picker to view the module by month, and use the location drop down to switch between locations assigned to you.

## Front Office



# Front office (schedule)

The **Schedule View** allows users to view Monthly Production, Daily Production, and Visits Graph data.

Hovering over each of these bar graphs will provide a breakdown into the metric.

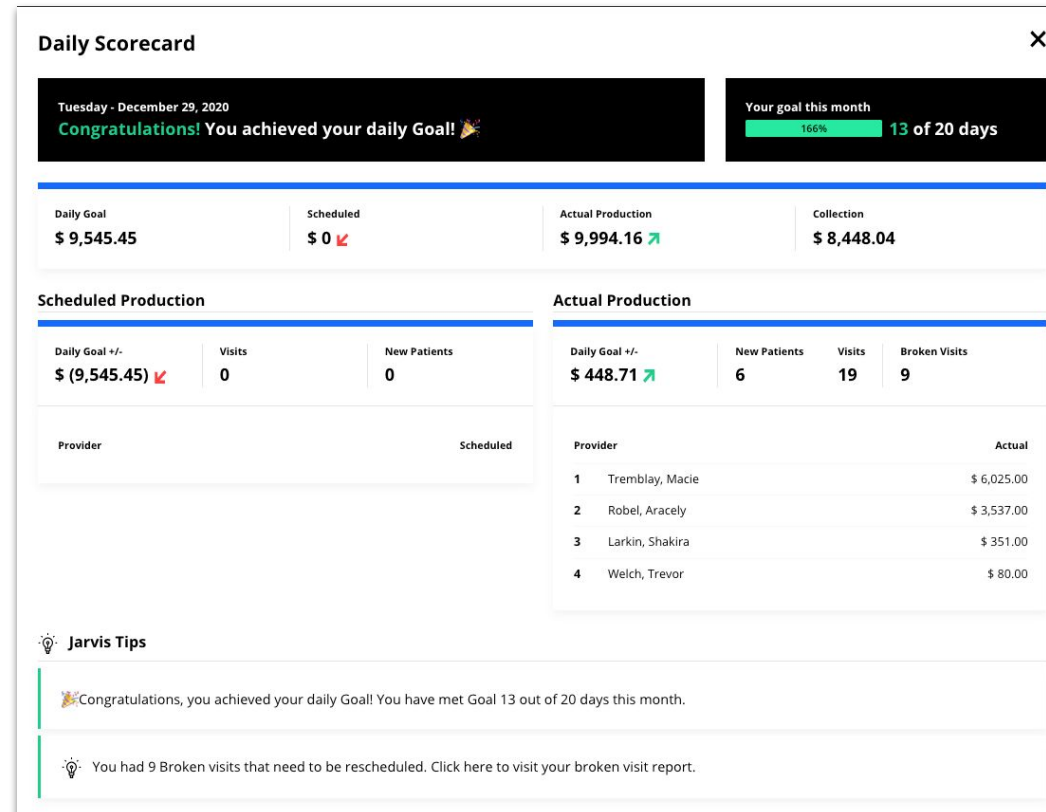
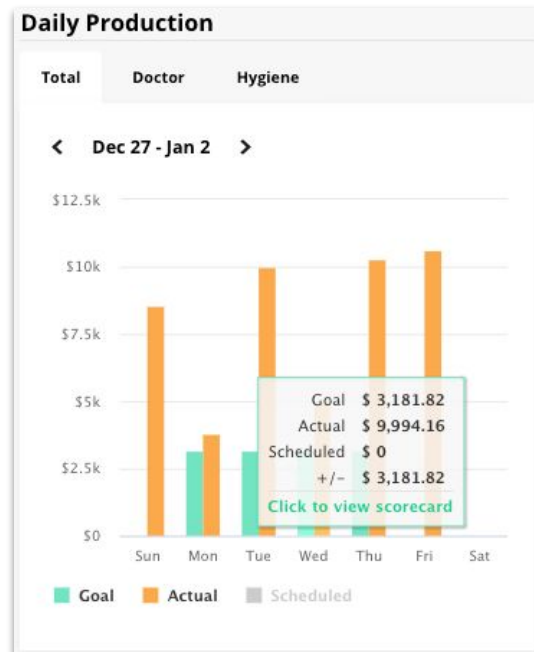
The Monthly Production table shows the Month to Date Production and Goal as well as Monthly production versus goal

The Daily Production and Visits Tables shows data for the week. (Sunday-Saturday).



# Front office (schedule scorecard)

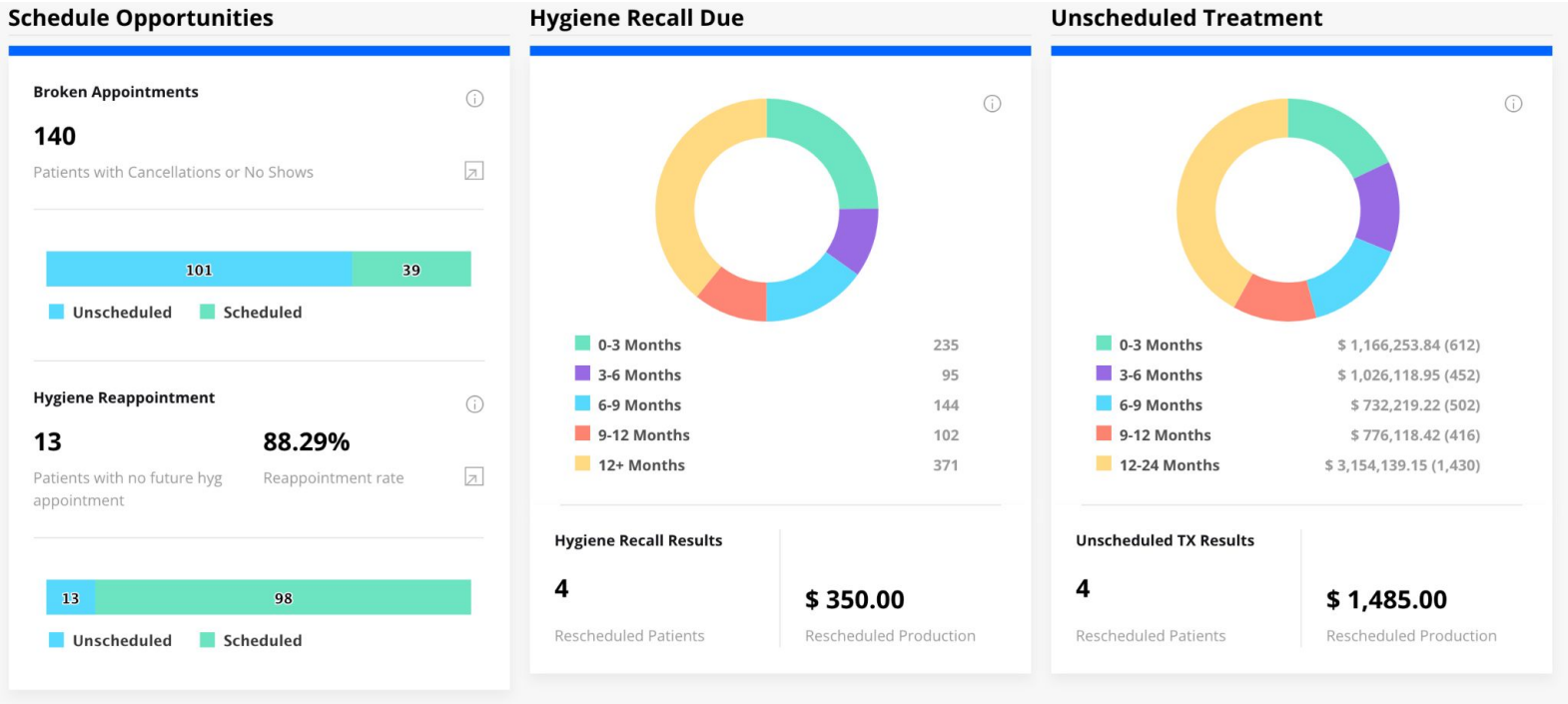
Click on any of the days in the Daily Production Table to show the Daily Scorecard. This is full of all sorts of ways to measure how a location is doing that day and offers tips for how to increase productivity.



# Front office (schedule)

The next set of tables helps identify opportunities within the schedule.

- Schedule Opportunities identifies broken appointments and hygiene reappointment statistics
- Hygiene Recall Due shows by date ranges the percent patients with hygiene recall due.
- The Unscheduled Treatment table shows by date ranges the percent patients with hygiene recall due.



# Front office (schedule)

Jarvis Tip!  
Use the Resync button to prompt a sync cycle to get the most up-to-date info.

The patient lists associated with the upper 4 graphs are Broken Appointments, Hygiene Recall Dues, Unscheduled Treatment, and Hygiene Reappoint table. They are located right under the graphs.

This table can be downloaded into a workable list in CSV form. This table can also be refreshed so appointment that are changed in your practice management system can be automatically removed from the list

Use the select box to assign an action to these tasks, either "Contacted - Did not Schedule" or "Unable to Reach" if you were unable to schedule.

Broken Appointments   Hygiene Recall Due   Unscheduled Treatment   Hygiene Reappoint

Status: Finished   Last Sync: about 12 hours ago   Resync

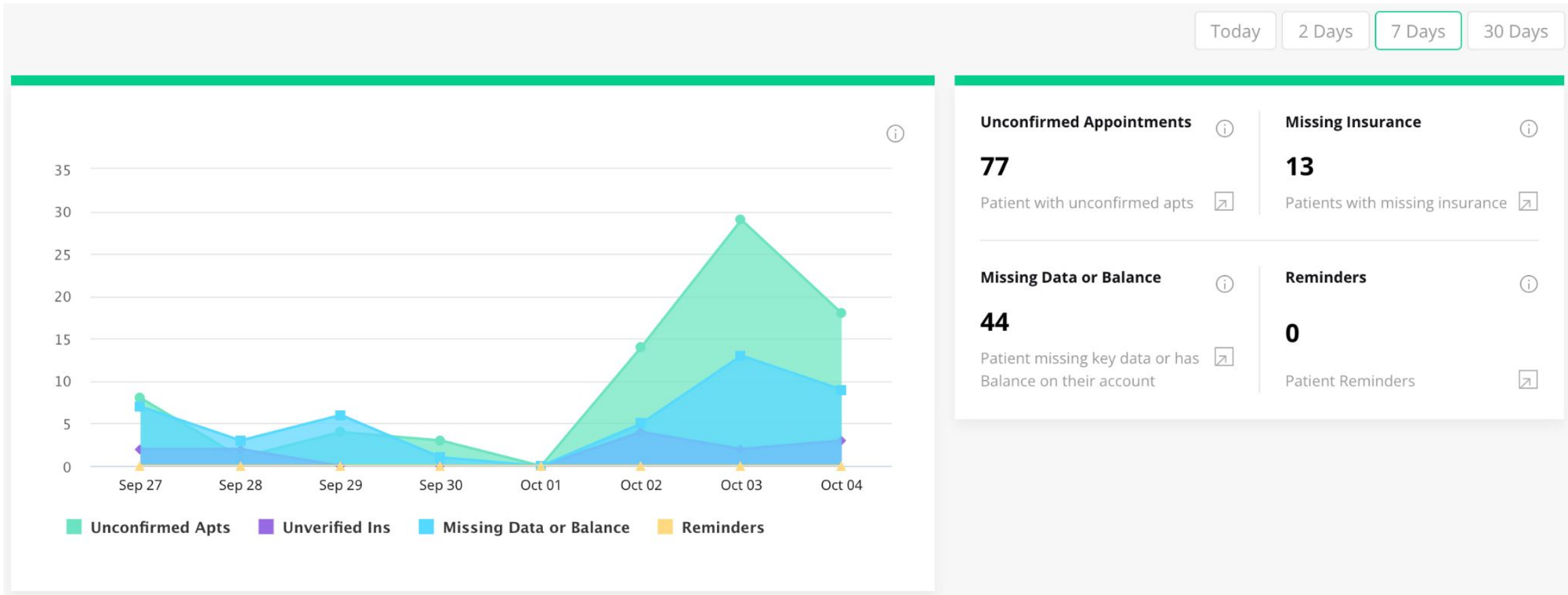
Top 20%   Mid Tier   Bottom 20%

☐ Completed   All Time   Search   Export CSV

<input type="checkbox"/> Patient	Age	Phone	Work Phone	Mobile Phone	Email	Provider	Next Visit Date
<input type="checkbox"/> Howell, Euna	16	165917	6585101	1028499	rockycollier@nolan.net	Rosario Orn	-
<input type="checkbox"/> Williamson, Sammy	44	2043007	9922591	976130	brodyrowe@cole.info	Dovie Bartell	-
<input type="checkbox"/> Streich, Saige	25	412977	1876586	7369778	lydatorp@berge.io	Dovie Bartell	-
<input type="checkbox"/> Kessler, Alia	42	4079142	1973958	459521	adamkemmer@zulauf.name	Dovie Bartell	-
<input type="checkbox"/> Monahan, Kira	58	6222231	3269975	610739	monicaswift@dach.org	Rosario Orn	-
<input type="checkbox"/> Dooley, Mikel	36	9207038	7341997	083864	abigaylemacejkovic@cummings.name	Rosario Orn	-
<input type="checkbox"/> Roob, Hanna	9	1947213	9822517	1124650	sadyegusikowski@lynch.net	Aracely Robel	-
<input type="checkbox"/> West, Name	12	336931	9573947	809039	dalekuphal@gleichner.com	Aracely Robel	-
<input type="checkbox"/> Mills, Georgette	32	064408	3970054	3519440	mallorydonnelly@runte.org	Rosario Orn	-
<input type="checkbox"/> Sipes, Noe	55	372535	1160474	598341	adahkub@barton.io	Rosario Orn	-
<input type="checkbox"/> Davis, Elvera	50	089466	3897890	926941	jacedooley@welch.biz	Rosario Orn	-

# Front office (tasks)

The tasks table shows how many tasks are generated for the predetermined date ranges.



# Front office (tasks)

The Table on the lower half of the screen shows all the tasks for each type that have been generated.

NOTE: Users can take action on these opportunities and document tasks, but they are not tied to specific users or due dates like *reminders*.

Unconfirmed AppointmentsUnverified InsuranceMissing Data Or BalanceReminders

Completed

Search

Export CSV

<input type="checkbox"/>	Patient	Age	Phone	Work Phone	Mobile Phone	Email	Appt Date	Appt Time	Appt Description
<input type="checkbox"/>	Glover, Rolando	38	9653893	8074008	962995	ofellavon@schmeler.org	Dec 02, 2021	01:00 pm	Ut quas minima perspiciatis optio unde dolores in quod dolorem laudantium excepturi. Aspernatur et
<input type="checkbox"/>	Jacobson, Marie	33	7429596	2337572	4051701	hanslockman@nikolaus.com	Dec 02, 2021	02:50 pm	Impedit rerum adipisci at dolore quae consequatur non aspernatur dolor sit blanditiis. Et eius enim iu
<input type="checkbox"/>	Pouros, Turner	48	9133127	1396235	5512285	lorinesenger@wisozk.name	Dec 02, 2021	01:00 pm	Cum occaecati rerum non aut laboriosam ut in reprehenderit ab maiores cupiditate. Quia nesciunt nis
<input type="checkbox"/>	Hauck, Otto	37	1462821	5133956	673649	rosemaryreichel@roob.net	Dec 02, 2021	10:00 am	Aperiam assumenda nostrum alias iure saepe dolor praesentium atque placeat at sit. Error ut cumqu
<input type="checkbox"/>	Deckow, Katrina	53	1959494	757849	1629042	jillianshanahan@west.info	Dec 02, 2021	04:00 pm	Consequatur sit minus doloreque dolores dolorem dignissimos voluptas consectetur odio modi hic,
<input type="checkbox"/>	Hahn, Donald	20	201755	1007358	1226605	brainweissnat@hermiston.biz	Dec 02, 2021	02:00 pm	Voluptatem et quod debitis ut et voluptates earum soluta doloribus vitae laboriosam. Beatae delectus
<input type="checkbox"/>	DuBuque, Pedro	57	5742849	7409504	433903	brycenemmerich@kuvalis.biz	Dec 02, 2021	10:00 am	Qui vitae illo cum voluptate in autem iusto est iure omnis quidem. Debitis rerum quia doloribus magn
<input type="checkbox"/>	Weber, Rozella	66	222020	1695340	557816	rebekahsenger@kozey.info	Dec 02, 2021	09:00 am	Et labore ut excepturi repellendus occaecati tenetur officis ut sit recusandae illum. Qui et accusamus
<input type="checkbox"/>	Graham, Joshua	44	1496743	7531930	8475410	jaredmcdermott@batz.name	Dec 02, 2021	11:00 am	Laboriosam distinctio consequatur aperiam et exercitationem dolor quia qui non eos alias. Possimus t
<input type="checkbox"/>	Cummerata, Kristoffer	31	374057	635471	294333	lucioushomenick@zieme.com	Dec 02, 2021	08:00 am	Sapiente unde quia animi repellat sapiente aliquid quia repellat quia aut eorum. Autem quo blanditiis

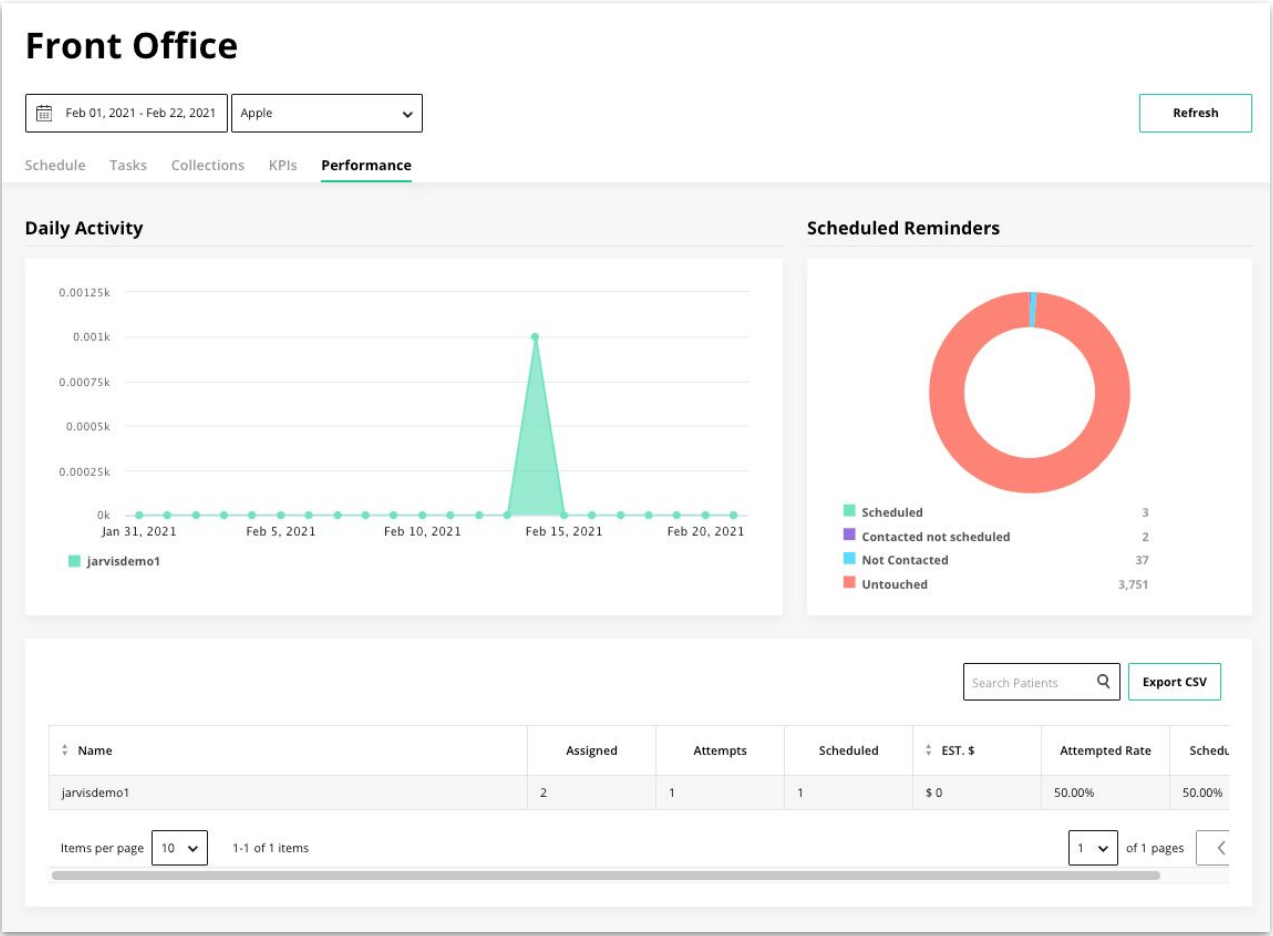
Items per page201-20 of 79 items

1 of 4 pages

# Front office (performance)

The Performance Tab shows the performance of each user who has completed a reminder in the date range selected.

This allows users to fully gauge how they are doing compared to other users. Managers can see how the organization is doing overall and provide feedback and coaching based on their findings.





# Front office (collections)

The Collections tab assists offices in meeting Collection goals and streamlining the collections process.

The Patient Balances Table shows a breakdown of Patient Balances in the following categories:

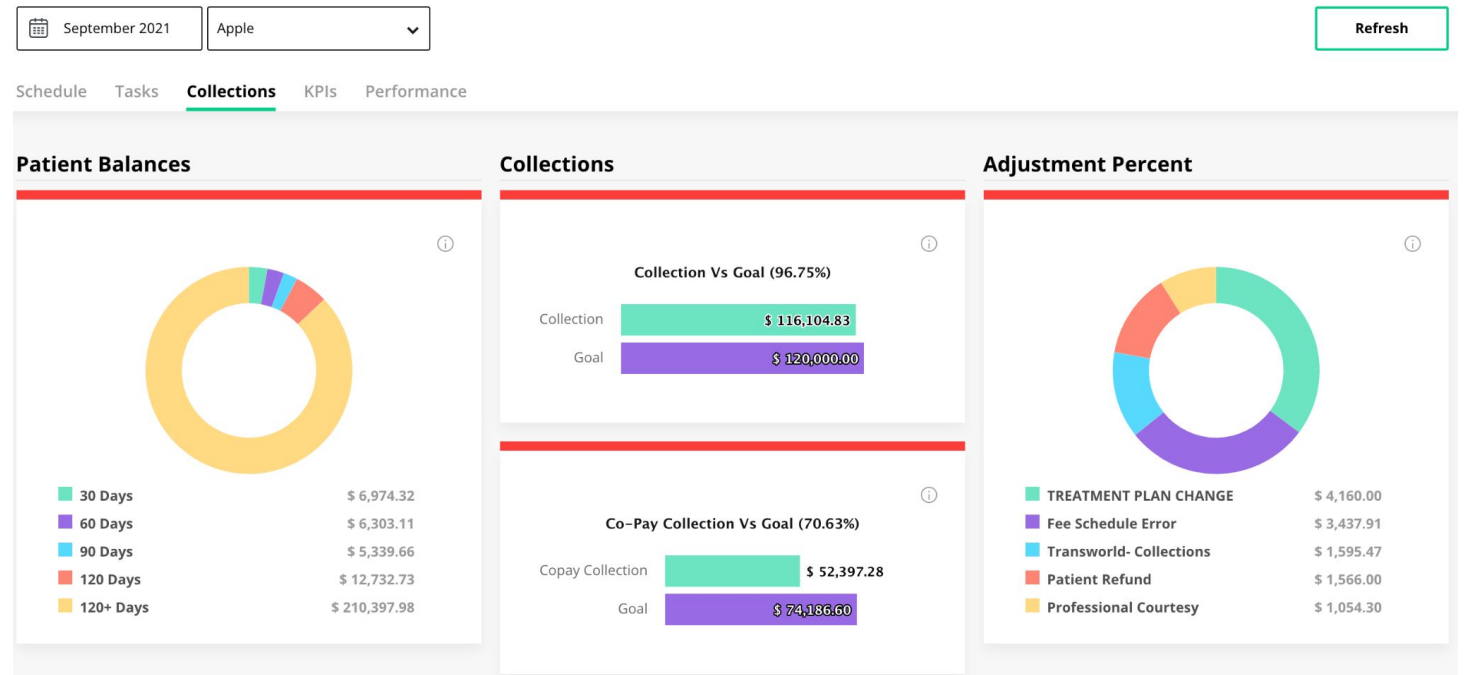
- Under 30
- Under 60
- Under 90
- Under 120
- Over 120

*Note: These buckets are based off your PMS type*

The Collections tables shows the Collection percent and Co-Pay collections % to goal.

The Adjustment Percent shows the value and percent of each adjustment type in the date range

## Front Office



# Front office (collections)

The Collections table shows the breakdown of all the statistics that are being shown in the 4 graphs above.

Patient Balances 30/60/90

CoPay Collections

Adjustments

Collections

Top 20%

Mid Tier

Bottom 20%

Search

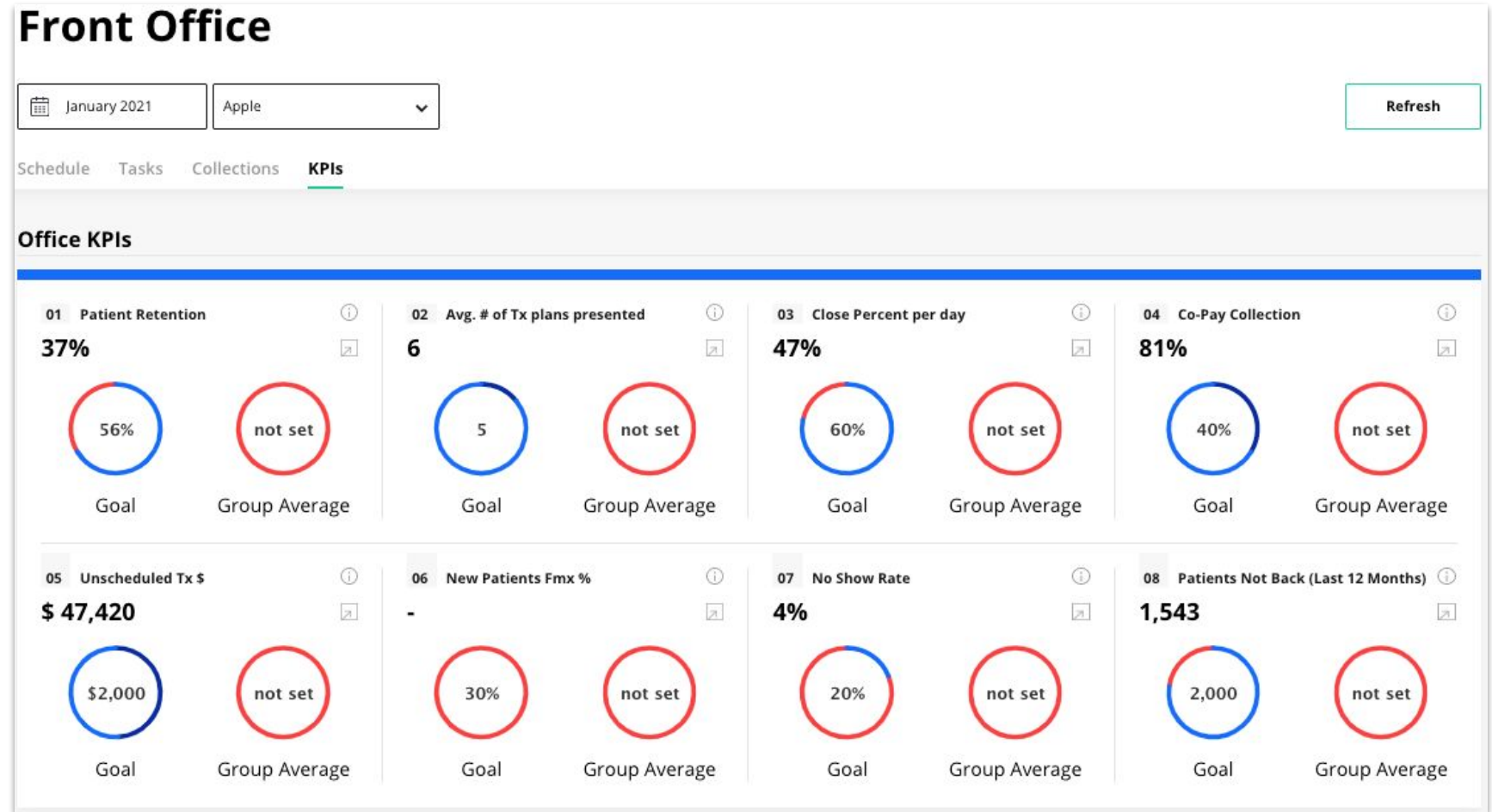
Export CSV

Patient	Current	Over 30	Over 60	Over 90	Over 120	Total
White, Jaida	\$ 128.00	\$ 0	\$ 0	\$ 772.00	\$ 6,183.00	\$ 7,083.00
Donnelly, Elmo	\$ 0	\$ 0	\$ 0	\$ 0	\$ 3,900.00	\$ 3,900.00
Davis, Jessika	\$ (183.33)	\$ (183.33)	\$ (183.33)	\$ (183.33)	\$ 4,476.68	\$ 3,743.36
Padberg, Marcel	\$ (81.50)	\$ (360.86)	\$ (81.50)	\$ (263.00)	\$ 4,383.32	\$ 3,596.46
Johns, Gonzalo	\$ (161.50)	\$ 0	\$ 0	\$ (174.00)	\$ 3,639.83	\$ 3,304.33
Reichert, Daisha	\$ (106.82)	\$ (106.82)	\$ 0	\$ 0	\$ 3,500.00	\$ 3,286.36
Bergstrom, Gisselle	\$ 3,200.00	\$ 0	\$ 0	\$ 0	\$ 0	\$ 3,200.00
Quitzon, Taylor	\$ (104.35)	\$ (104.35)	\$ (286.78)	\$ (104.35)	\$ 3,795.14	\$ 3,195.31
Stiedemann, Shakira	\$ (204.33)	\$ (111.33)	\$ (204.33)	\$ (5,143.33)	\$ 8,808.00	\$ 3,144.68
Huels, Madisyn	\$ (263.50)	\$ (123.50)	\$ (593.50)	\$ (123.50)	\$ 4,223.00	\$ 3,119.00
Brakus, Verona	\$ (283.33)	\$ 0	\$ 0	\$ 3,400.00	\$ 0	\$ 3,116.67
Ruecker, Daron	\$ (100.00)	\$ (100.00)	\$ 0	\$ 0	\$ 3,300.00	\$ 3,100.00
Tromp, Ransom	\$ (104.17)	\$ (104.17)	\$ (104.00)	\$ (4,104.17)	\$ 7,500.00	\$ 3,083.49

# Front office KPI's

The KPIs tab shows users an organization's Key Performance Indicators, as well as allows for organizations to set goals for these KPIs.

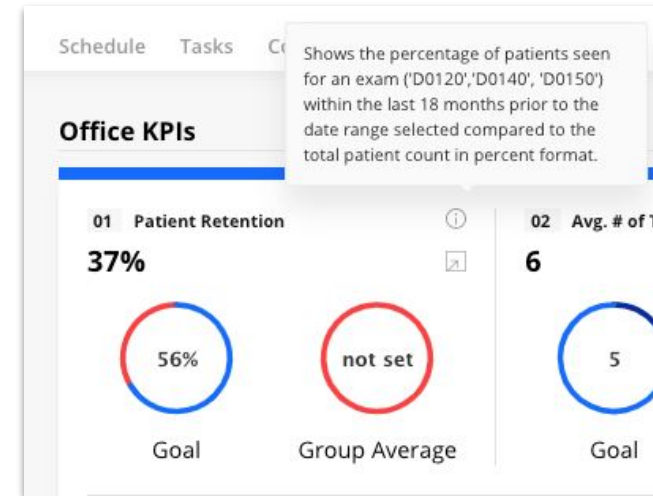
Goals can be set in the KPI goals section in the **Configuration Module.**



# Front office KPI's

A few things to note about the KPIs:

- Hovering over the tooltip or (i) icon will show the definition for that KPI
- The blue status shows how much of the goal is achieved and the red area shows how much of the goal remains to be achieved compared to the goal determined by your organization
- The breakout button will show a breakdown of the statistics being shown in the KPI. This can be downloaded into a CSV from this screen



**Office #5 - Unscheduled Tx \$ - Breakdown** [Export CSV](#) ✕

Apple

#	Provider Id	Provider	Dollars
1	DL	Orn, Rosario	\$1,378.44
2	HYG	Toy, Margaret	\$3,232.00
3	TJD	Robel, Aracely	\$42,809.31
Avg	-	-	\$15,806.58
Total	-	-	\$47,419.75

# Hygiene Recall

The **Hygiene Recall** module helps you track patients who are not scheduled for a future Hygiene appointment and / or patients that have been successfully recalled (appointed).

Hygiene Recall

Aug 01, 2021 - Aug 31, 2021

Apple

Refresh

Summary

Display Columns

Search

Export CSV

Provider	Provider ID	Office	Missed Recall	Patient Recalled	# of Future Appointments	Patients Recalled \$	Patient Recall Rate %
Larkin, Shakira	SH	Apple	21	99	0	\$ 12,058.11	82.50%
Robel, Aracely	TJD	Apple	0	5	139	\$ 676.21	100.00%
VonRueden, Major	PC	Apple	0	4	0	\$ 722.00	100.00%
Cassin, Cortez	OO	Apple	0	0	4	\$ 0	0.00%
Schulist, Katheryn	MET	Apple	0	0	11	\$ 0	0.00%
Nader, Myrtice	INV	Apple	0	0	14	\$ 0	0.00%
Toy, Margaret	HYG	Apple	0	1	597	\$ 71.00	100.00%
Schuppe, Eveline	DMO	Apple	0	0	38	\$ 0	0.00%
Orn, Rosario	DL	Apple	0	0	3	\$ 0	0.00%
Heaney, Margaret	DD	Apple	0	0	9	\$ 0	0.00%
Labadie, Jazmyne	BB	Apple	0	0	6	\$ 0	0.00%
Welch, Trevor	B32	Apple	0	0	38	\$ 0	0.00%

Items per page

20

1-12 of 12 items

1

of 1 pages

<

>

Summary

Search

Export CSV

Patient Name	Patient ID	Age	Birthdate	Gender	Address	City	State	Zip
Aufderhar, Frederick	1003	16	Jun 17, 2005	Female	9106 South Roadtown	Extensionmouth	TX	
Koelpin, Eldred	1055	28	Oct 12, 1993	Female	47723 East Forgesmouth	Greenview	TX	
Grant, Mellie	1060	63	Apr 10, 1958	Male	859 North Courseburgh	Mountainschester	TX	
Gulgowski, Jairo	1068	42	Jul 14, 1979	Male	103 New Cliffsshire	Underpassstad	TX	
Ortiz, Deontae	1164	41	Feb 07, 1980	Female	9814 Port Shoalville	Prairiefort	TX	

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. You are also able to click on provider to see additional information.

Clicking on the number of patients missed will bring up a list of the patients

# Hygiene Recall (Patients Missed Reminders)

In the “**Patients Missed**” drilldown, you can select patients and add a reminder for yourself or another Jarvis User so they can follow up with the patient.

Summary

Search

Export CSV

<input type="checkbox"/>	Patient Name	Patient ID	Age	Birthdate	Gender	Address	City
<input type="checkbox"/>	Christiansen, Angelita	3221	29	1992-10-27	Female		
<input type="checkbox"/>	Crona, Dandre	350	18	2003-12-17	Male		
<input type="checkbox"/>	Hayes, Lee	351	15	2006-11-04	Female		
<input type="checkbox"/>	Marks, Sigrid	4794	32	1989-06-28	Female		

Items per page 10 1-4 of 4 items

Summary

Create Reminders (4)

Search

Export CSV

<input checked="" type="checkbox"/>	Patient Name	Patient ID	Age	Birthdate	Gender	Address	City
<input checked="" type="checkbox"/>	Christiansen, Angelita	3221	29	1992-10-27	Female	6137 East Brookside	Lodgetown
<input checked="" type="checkbox"/>	Crona, Dandre	350	18	2003-12-17	Male	76447 Port Turnipiketown	Roadfort
<input checked="" type="checkbox"/>	Hayes, Lee	351	15	2006-11-04	Female	8430 Lake Shoalsborough	Mountainland
<input checked="" type="checkbox"/>	Marks, Sigrid	4794	32	1989-06-28	Female	6242 West Lightside	Ranchstad

Items per page 10 1-4 of 4 items

1 of 1 pages

Bulk Add Reminders

Select Reminder Type

Select a reminder type

Select Due Date

Assign to

Select a user

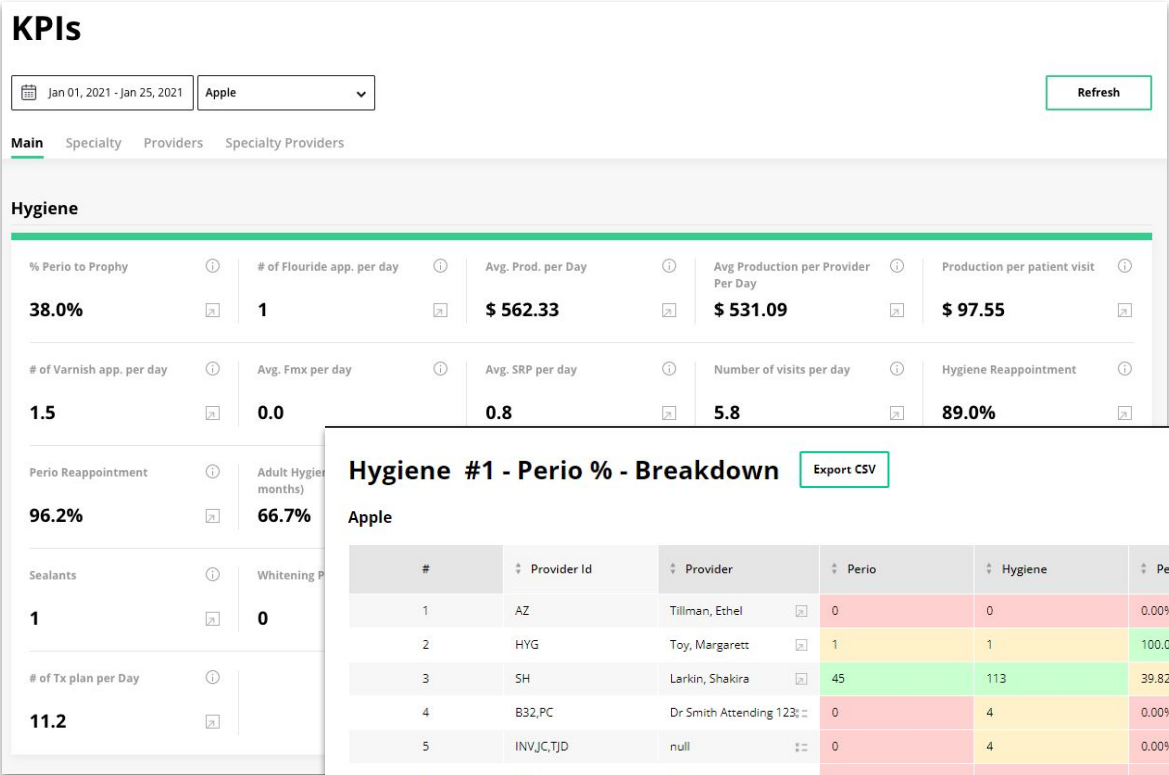
Cancel

Add



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.

# KPI (Main View)



**Hygiene #1 - Perio % - Breakdown** Export CSV

Apple

#	Provider Id	Provider	Perio	Hygiene	Percent
1	AZ	Tillman, Ethel	0	0	0.00%
2	HYG	Toy, Margaret	1	1	100.00%
3	SH	Larkin, Shakira	45	113	39.82%
4	B32,PC	Dr Smith Attending 123	0	4	0.00%
5	INVJC,TJD	null	0	4	0.00%
6	OO	charlene	0	0	0.00%
Avg	-	-	-	-	37.70%
Total	-	-	46	122	139.82%

The **KPI Module** shows your businesses Key Performance Indicators grouped by Hygiene, Doctors, and Office.

Clicking on the Breakdown Button will show a breakdown of the information that is going into the metric

You can choose to view data for a desired date range by clicking on the date picker.

You have the ability to download data by clicking on the Export CSV button.

Choosing **“ALL”** in the location dropdown will take you to an aggregate view of all offices data.

# KPI (Specialty)

KPIs

Jan 01, 2021 - Jan 25, 2021

Apple

Refresh

Main

Specialty

Providers

Specialty Providers

Endo

Total Production	Production per Day	Total Consults	Consults per day	Re-treats Count
\$ 19,207.35	\$ 1,067.08	12	6	0
RCT Count	Obstruction Count	Biopure Count	Patients Visits	
0	0	0	123	

Perio

Total Production	Production per Day	Total Consults	Consults per day	Treatment plan per Exam
\$ 19,207.35	\$ 1,067.08	12	6	\$ 24,566.70
Implant Placement Count	Implant Placement \$	Sedations \$	Patients Visits	Perio Codes \$
0	\$ 0	\$ 38.00	123	\$ 11.00

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

Endo #1 - Total Production - Breakdown

Export CSV

Apple

#	Date	Production
1	2021-11-01	\$1,156.61
2	2021-11-02	\$1,090.80
3	2021-11-03	\$643.60
4	2021-11-04	\$-536.00
5	2021-11-05	\$7,952.35
6	2021-11-08	\$398.30
7	2021-11-09	\$-196.57
8	2021-11-10	\$269.80
9	2021-11-11	\$243.76
10	2021-11-12	\$111.00
11	2021-11-13	\$331.60
12	2021-11-15	\$158.22
13	2021-11-16	\$105.00
14	2021-11-17	\$6,105.38
15	2021-11-18	\$1,134.51
16	2021-11-19	\$153.20
17	2021-11-20	\$504.00
18	2021-11-22	\$429.94
19	2021-11-23	\$245.61
Avg	-	\$1,068.48
Total	-	\$20,301.11

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



# KPI (Providers & Specialty Providers)

The **Providers KPI** tab will allow you a view of all offices you have access to. Here, you will be able to drill down on the data by clicking on the data. You can go through the Doctor and Hygiene Tabs.

KPIs

Jan 01, 2021 - Jan 25, 2021

Apple

Refresh

Main

Specialty

Providers

Specialty Providers

Doctor

Hygiene

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Location	Provider	1. Case Acceptance - Same Day	2. Case Acceptance - Rolling 90 Days	3. \$ New Patients Receiving Treatment Plans	4. \$ Existing Patients Receiving Treatment Plans	5. Average Time per Doctor Appointment (minutes)	6. Pn
Apple	Robel, Aracely - TJD	11.6%	31.9%	\$ 5,666.71	\$ 960.92	74.42	\$ 698
Apple	VonRueden, Major - PC	0.0%	0.0%	\$ 4,932.00	\$ 0	95.36	\$ 103
Apple	Boehm, Gisselle - OSP	0.0%	0.0%	\$ 1,326.00	\$ 0	37.70	\$ 0
Apple	Tremblay, Macie - JC	0.0%	0.0%	\$ 2,757.00	\$ 5,152.35	74.03	\$ 586
Apple	Nader, Myrtice - INV	0.0%	0.0%	\$ 0	\$ 0	31.13	\$ 512
Apple	Schuppe, Eveline - DMO	100.0%	100.0%	\$ 0	\$ 2.50	72.03	\$ 0
Apple	Heaney, Margaret - DD	0.0%	0.0%	\$ 0	\$ 0	34.65	\$ 0
Apple	Labadie, Jazmyne - BB	0.0%	0.0%	\$ 0	\$ 0	54.10	\$ 0
Apple	Welch, Trevor - B32	55.6%	55.6%	\$ 0	\$ 0	73.80	\$ 73.6

KPIs

Jan 01, 2021 - Jan 25, 2021

Apple

Refresh

Main

Specialty

Providers

Specialty Providers

Endo

Perio

Ortho

Os

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Location	Provider	1. Total Production	2. Production per Day	3. Total Consults	4. Consults per day	5. Re-treats Count	6. R
Apple	Tremblay, Macie - JC	\$ 13,117.71	\$ 6,558.86	12	0	0	0
Apple	Welch, Trevor - B32	\$ 6,089.64	\$ 358.21	0	0	0	0
Avg:		\$ 9,603.67	\$ 3,458.53	6	0	0	0
Total:		\$ 19,207.35	\$ 6,917.07	12	0	0	0

By choosing **“ALL”** on the location dropdown in **Specialty View**, all office you have access to will display. You can choose the specialty you would like to view by selecting it from the Metric tabs. You can select Endo, Perio, Ortho, and OS

# Morning huddle

The **Morning Huddle Module** displays information in three parts (Yesterday, Today, and Tomorrow). This module can be configured in *Huddle Settings* in the **Configuration Module**

Jarvis Tip!  
Easily view daily  
scorecards here!

## Morning Huddle

Sep 27, 2021Apple

Refresh

Yesterday Sunday - Sep 26, 2021	View Scorecard	Today Monday - Sep 27, 2021	View Scorecard	Tomorrow Tuesday - Sep 28, 2021	View Scorecard
Yesterday's Production (gross)	\$3,666.20	Today's Scheduled Production	\$3,019.21	Tomorrow's Scheduled Production	\$3,670.00
Goal	\$0.00	Goal	\$5,714.29	Goal	\$5,714.29
Yesterday's Production (net)	\$3,627.20	New Patients (Actual)	0	New Patients (Scheduled)	3
Yesterday's Collection	\$1,886.23	New Patients (Scheduled)	2	Hygiene Production (Scheduled)	\$1,702.00
Patient Co-pay Collection (%)	82.76	Hygiene Production (Scheduled)	\$916.97	Unscheduled Treatment	\$0.00
Production Per Patient	\$241.81	Hygiene Production (Actual)	\$64.79	Unscheduled Family Members	0
New Patients (Actual)	2	Unscheduled Treatment	\$0.00	Unscheduled Hygiene	6
Treatment acceptance (%)	30.24	Unscheduled Family Members	4	Past Due AR	\$369.52
Presented	\$22,682.35	Unscheduled Hygiene	3	Due for BWX	3
Completed	\$3,666.20	Patient Birthdays	0	Due for FMX	0
		Past Due AR	\$-754.15		

On the left most part, you will see **Yesterday's** data, which displays the information a day before the date picked on the date picker.

In the middle of the module, you will see **Today's** data which displays the information of the date picked on the date picker.

In the right part, you will see **Tomorrow's** data part which displays the information the day after the date picked on the date picker.

Selecting the **Breakout** icon reveals the detail of the corresponding field.

New Patients (Scheduled)

3

# Operations (Offices)

The **Operations** Module has multiple views available to you.

The first view in **Operations** is the **Offices View**: This view gives the most common metrics by office

Operations

Aug 01, 2021 - Aug 25, 2021

LOCATION All

Refresh

Offices

Production DetailsPayorsPerformanceProvidersServicesTrendsCancellationsClaimsComplianceMarketingMonthly Practice Scorecards

DefaultLast YearDiff Last YearPercent Diff Last Year

Top 20%Mid TierBottom 20%

SearchExport CSV

Location	Gross Prod	Adjustment	Adjustment % of Prod	Net Prod	Collection	Collection %	Pts Visit	Npt Visit
Apple	\$ 109,284.37	\$ (5,487.14)	-5.02%	\$ 103,797.23	\$ 110,502.46	106.46%	304	54
Auburn	\$ 53,986.19	\$ (2,418.31)	-4.48%	\$ 51,567.88	\$ 43,757.36	84.85%	210	48
Bluetooth Dental	\$ 114,409.38	\$ (208.06)	-0.18%	\$ 114,201.32	\$ 102,777.32	90.00%	388	76
Dental Floss	\$ 36,378.08	\$ (522.76)	-1.44%	\$ 35,855.32	\$ 45,149.92	125.92%	207	39
Dental Haven	\$ 42,216.30	\$ (3,489.14)	-8.26%	\$ 38,727.16	\$ 49,841.01	128.70%	153	42
Flouride	\$ 43,189.38	\$ (4,621.02)	-10.70%	\$ 38,568.36	\$ 65,143.28	168.90%	124	35
FreshBreath	\$ 53,986.19	\$ (2,418.31)	-4.48%	\$ 51,567.88	\$ 43,757.36	84.85%	210	48
Good Year	\$ 61,321.65	\$ (2,842.35)	-4.64%	\$ 58,479.30	\$ 57,071.47	97.59%	222	56
Happy Tooth	\$ 70,489.65	\$ (10,078.61)	-14.30%	\$ 60,411.04	\$ 86,298.54	142.85%	230	51
Jarvis	\$ 39,879.58	\$ 2,460.72	6.17%	\$ 42,340.30	\$ 52,681.91	124.42%	172	67
Unreported BMC 1	\$ 0	\$ 0	0.00%	\$ 0	\$ 0	0.00%	0	0

DefaultLast YearDiff Last YearPercent Diff Last Year

Top 20%Mid TierBottom 20%

SearchExport CSV

Location	Gross Prod	Adjustment	Adjustment % of Prod	Net Prod	Collection	Collection %	Pts Visit	Npt Visit
Apple	\$ 109,284.37	\$ (5,487.14)	-5.02%	\$ 103,797.23	\$ 110,502.46	106.46%	304	54
Auburn	\$ 53,986.19	\$ (2,418.31)	-4.48%	\$ 51,567.88	\$ 43,757.36	84.85%	210	48
Bluetooth Dental	\$ 114,409.38	\$ (208.06)	-0.18%	\$ 114,201.32	\$ 102,777.32	90.00%	388	76
Dental Floss	\$ 36,378.08	\$ (522.76)	-1.44%	\$ 35,855.32	\$ 45,149.92	125.92%	207	39
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Good Year	\$ 61,321.65	\$ (2,842.35)	-4.64%	\$ 58,479.30	\$ 57,071.47	97.59%	222	56
Happy Tooth	\$ 70,489.65	\$ (10,078.61)	-14.30%	\$ 60,411.04	\$ 86,298.54	142.85%	230	51
Jarvis	\$ 39,879.58	\$ 2,460.72	6.17%	\$ 42,340.30	\$ 52,681.91	124.42%	172	67
Unreported BMC 1	\$ 0	\$ 0	0.00%	\$ 0	\$ 0	0.00%	0	0

You can click through the different views to see either the difference between the same days this year and last year or the % difference between this year and last year

# Operations (Production Details)

The **Production Details** report gives you the list of all the locations assigned to you with data grouped by office, per working day, per patient, and per procedure. This can be filtered by Line of Business.

This report is different as the toggles can be used to break down the metrics by day and by provider

Offices **Production Details** Payors Performance Providers Services Trends Cancellations Claims Compliance Marketing Monthly Practice Scorecards

Top 20% Mid Tier Bottom 20%

Line of Business All Date Provider

Search Export CSV

Location	By Office				Per Working Day			
	Net Prod	Collection	Pts Visits	New Pts Visit	Net Prod	Collection	Pts Visit	Npt Visit
Apple	\$ 103,797.23	\$ 110,502.46	304	54	\$ 5,463.01	\$ 5,815.92	16	3
Auburn	\$ 51,567.88	\$ 43,757.36	210	48	\$ 2,864.88	\$ 2,430.96	12	3
Bluetooth Dental	\$ 114,201.32	\$ 102,777.32	388	76	\$ 5,438.16	\$ 4,894.16	18	4
Dental Floss	\$ 35,855.32	\$ 45,149.92	207	39	\$ 2,109.14	\$ 2,655.88	12	2
Dental Haven	\$ 38,727.16	\$ 49,841.01	153	42	\$ 2,278.07	\$ 2,931.82	9	2
Flouride	\$ 38,568.36	\$ 65,143.28	124	35	\$ 2,754.88	\$ 4,653.09	9	2
FreshBreath	\$ 51,567.88	\$ 43,757.36	210	48	\$ 2,864.88	\$ 2,430.96	12	3
Good Year	\$ 58,479.30	\$ 57,071.47	222	56	\$ 3,439.96	\$ 3,357.15	13	3
Happy Tooth	\$ 60,411.04	\$ 86,298.54	230	51	\$ 3,553.59	\$ 5,076.38	14	3
Jarvis	\$ 42,340.30	\$ 52,681.91	172	67	\$ 2,822.69	\$ 3,512.13	11	4
Unsupported PMS 1	\$ 0	\$ 0	0	0	\$ 0	\$ 0	0	0

Top 20% Mid Tier Bottom 20%

Line of Business All Date Provider Apple

Search Export CSV

Location	By Office				Per Working Day			
	Net Prod	Collection	Pts Visits	New Pts Visit	Net Prod	Collection	Pts Visit	Npt Visit
Apple	\$ 103,797.23	\$ 110,502.46	304	54	\$ 5,463.01	\$ 5,815.92	16	3
Cassin, Cortez	\$ 4,650.00	\$ 4,254.23	25	2	\$ 7,800.00	\$ 1,544.50	24	2
Mon - Aug, 02	\$ 0	\$ 1,571.81	0	0	\$ 0	\$ 0	0	0
Tue - Aug, 03	\$ 3,800.00	\$ 744.50	11	1	\$ 3,800.00	\$ 744.50	11	1
Wed - Aug, 04	\$ 0	\$ (465.50)	0	0	\$ 0	\$ 0	0	0
Thu - Aug, 05	\$ (3,150.00)	\$ 72.92	0	0	\$ 0	\$ 0	0	0
Fri - Aug, 06	\$ 0	\$ 267.34	0	0	\$ 0	\$ 0	0	0
Mon - Aug, 09	\$ 0	\$ 72.92	0	0	\$ 0	\$ 0	0	0
Tue - Aug, 10	\$ 0	\$ 70.00	0	0	\$ 0	\$ 0	0	0
Wed - Aug, 11	\$ 0	\$ 775.00	0	0	\$ 0	\$ 0	0	0
Thu - Aug, 12	\$ 0	\$ 0	1	0	\$ 0	\$ 0	0	0

# Operations (Payors)

The **Payors Report** shows gross production, net production, collection, and new and existing patients visits grouped by payor, per working day, per patient visits, and by procedure.

- 1. **Gross Production** - Gross Production of dental insurances on the selected office and date range.
- 2. **Net Production** - Net Production of dental insurances on the selected office and date range.
- 3. **% of TTL** - Percent of each production value with the total table calculation.
- 4. **Collection** - Collection of dental insurances on the selected office and date range.
- 5. **Patient Visits** - Patient visits of dental insurances on the selected office and date range.
- 6. **NPTS Visits** - New Patient visits of dental insurances on the selected office and date range.
- 7. **PWD PTS Visits** - Per working day Patient visits of dental insurances on the selected office and date range.
- 8. **PWD NPTS Visits** - Per working day new patient visits of dental insurances on the selected office and date range.
- 9. **PWD Production** - Per working day production of dental insurances on the selected office and date range.
- 10. **PPV Production** - Per patient visit production of dental insurances on the selected office and date range.
- 11. **PPV Procedure** - Per patient visit procedures of dental insurances on the selected office and date range.
- 12. **PP Production** - Per procedure production of dental insurances on the selected office and date range.

Jarvis Tip!  
This is a module  
where *Code Mapping* can really  
come in handy!

Operations

Jan 01, 2021 - Jan 28, 2021 LOCATION: All Refresh

Offices Production Details Payors Performance Providers Services Trends Cancellations Claims Compliance Marketing

Top 20% Mid Tier Bottom 20% Search Export CSV

Payor	Location	By Payor					Per Working Day		
		Production	% of TTL	Collection	Pts Visits	Npts Visits	Production	Pts Visits	Npts Visits
Kub, Kris and Volkman LLC - 1	Apple	\$ 7,550.10	9.01%	\$ 8,948.10	22	3	\$ 1,258.35	3.67	0.50
Braun, Damore and Sauer LLC - 2	Apple	\$ 1,276.60	1.52%	\$ 2,076.25	6	1	\$ 638.30	3.00	0.50
Yost-Hill Inc - 3	Apple	\$ 96.00	0.11%	\$ 711.93	0	0	\$ 0	0.00	0.00
Boyer-Kohler LLC - 5	Apple	\$ 913.00	1.09%	\$ 1,235.00	7	0	\$ 456.50	3.50	0.00
Hayes-Lehner and Sons - 6	Apple	\$ 858.40	1.02%	\$ 546.90	3	1	\$ 429.20	1.50	0.50
Quigley-Roberts and Sons - 7	Apple	\$ (110.40)	-0.13%	\$ 0	0	0	\$ 0	0.00	0.00
Lesch-Bogan Inc - 8	Apple	\$ 366.00	0.44%	\$ 805.95	1	0	\$ 366.00	1.00	0.00
Bernhard-Quigley LLC - 9	Apple	\$ 12,054.00	14.39%	\$ 13,028.02	30	2	\$ 1,095.82	2.73	0.18
Flatley, Kling and Bosco LLC - 12	Apple	\$ 1,711.00	2.04%	\$ 2,134.52	4	0	\$ 855.50	2.00	0.00
Schmitt and Sons Group - 13	Apple	\$ 76.00	0.09%	\$ 0	3	1	\$ 76.00	3.00	1.00
Wisoky-Wilderman Inc - 15	Apple	\$ (106.40)	-0.13%	\$ 0	0	0	\$ 0	0.00	0.00
Siemens, Schultz and Streich Group - 16	Apple	\$ 1,151.00	1.37%	\$ 671.00	1	1	\$ 1,151.00	1.00	1.00

# Operations (Performance)

The **Performance Tab** breaks down Production (Actual and Scheduled), collection, patient visits, and new patient visits

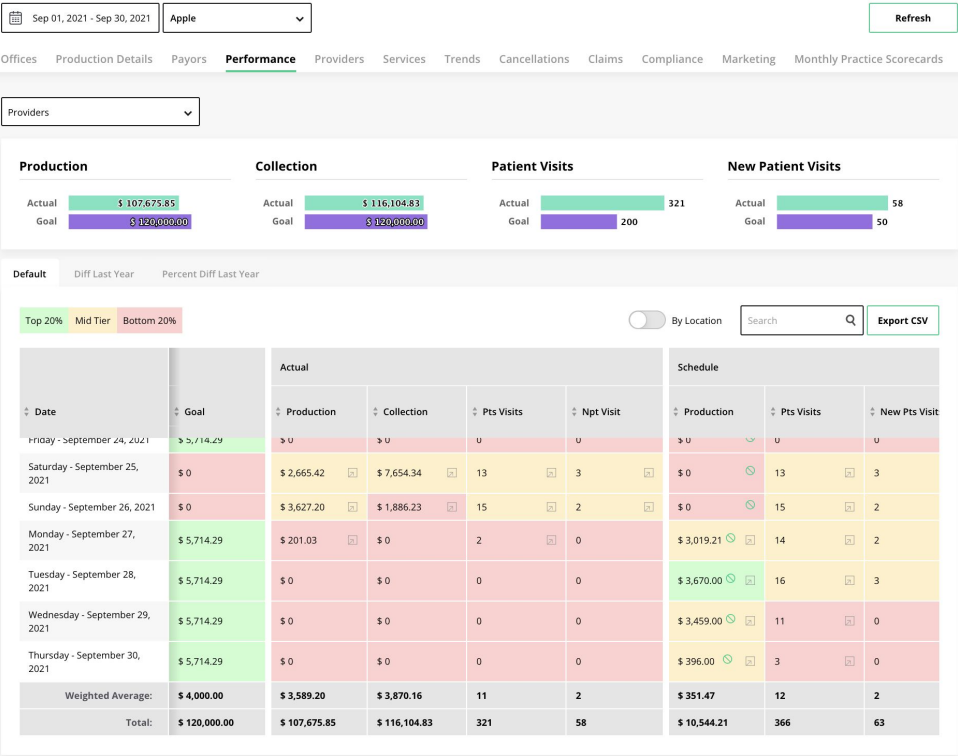
The Different Column headers show these metrics for “Actual”, or days that have passed, and “Scheduled”, or days that have yet to occur. The third header compared these metrics to the “Goal”.

The “By Location” toggle allows users to view the summary of multiple locations at the same time.

The Goal Table shows how each location is doing MTD compared to their Monthly Goal



## Operations



# Operations (Providers)

The **Providers Tab** breaks down Gross Production, Net Production, collection, patient visits, new patient visits, and working days by providers.

This is then further broken down

- Per Working Day
- Per Patient Visit
- Per Procedure

Use the Line of Business Filters to see the different provider types grouped together.

Operations

Oct 01, 2021 - Oct 01, 2021

Dental Haven

Refresh

OfficesProduction DetailsPayorsPerformanceProvidersServicesTrendsCancellationsClaimsComplianceMarketingMonthly Practice Scorecards

DefaultDiff Last YearPercent Diff Last Year

Top 20%Mid TierBottom 20%

Line of Business AllSearchExport CSV

Location	Provider	Provider ID	By Provider				
			Net Production	Gross Production	Collection	Pts Visits	Npt Visits
Dental Haven	hygienist Hane, Raphael	B32	\$ 406.81	\$ 246.00	\$ 567.21	8	4
Dental Haven	hygienist Beahan, Domenica	HYG	\$ (15.00)	\$ 0	\$ 0	0	0
Dental Haven	doctor Nicolas, Dewayne	INV	\$ 0	\$ 0	\$ 0	1	0
Dental Haven	doctor Emmerich, Sophia	JMA	\$ 0	\$ 0	\$ 1,587.40	0	0
Dental Haven	doctor Veum, Elody	TVE	\$ 2,929.20	\$ 2,979.00	\$ 1,788.40	15	4
Weighted Average:			\$ 664.20	\$ 645.00	\$ 788.60	5	2
Total:			\$ 3,321.01	\$ 3,225.00	\$ 3,943.01	24	8

Items per page10

1-5 of 5 items

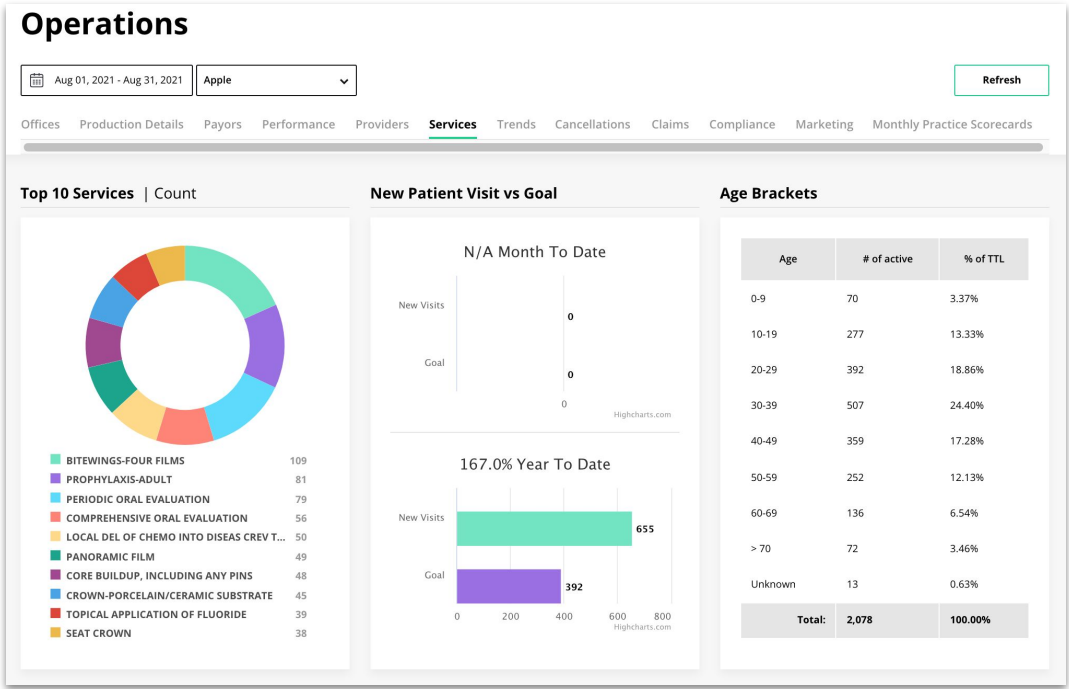
1 of 1 pages



# Operations (Services)

The **Services tab** allows users to see procedure counts in a date range in the datepicker

The top 3 tables display the top services by count, New Patient Visits versus the goals for Month and Year to Date and the Age Brackets



Top 20% Mid Tier Bottom 20%			Line of Business All		Search		Export CSV
Service	Location	Provider	Code	Type	Count	Total Fee	
CO-PAY FOR DMO	Flouride	Alfonso Fritsch	COPAY	Undefined	1	\$ 5.00	
POST OP	Flouride	Alfonso Fritsch	D0000	Undefined	1	\$ 0	
PERIODIC ORAL EVALUATION	Flouride	Alfonso Fritsch	D0120	Diagnostic	27	\$ 684.00	
LIMITED ORAL EVALUATION-PROBLEM FOCUSED	Flouride	Alfonso Fritsch	D0140	Diagnostic	4	\$ 78.00	
COMPREHENSIVE ORAL EVALUATION	Flouride	Alfonso Fritsch	D0150	Diagnostic	30	\$ 1,004.64	
BITEWINGS-FOUR FILMS	Flouride	Alfonso Fritsch	D0274	Diagnostic	1	\$ 38.00	
PANORAMIC FILM	Flouride	Alfonso Fritsch	D0330	Diagnostic	1	\$ 68.00	
PROPHYLAXIS-ADULT	Flouride	Alfonso Fritsch	D1110	Preventive	42	\$ 2,247.76	
PROPHYLAXIS-CHILD	Flouride	Alfonso Fritsch	D1120	Preventive	7	\$ 126.00	
TOPICAL APPLICATION OF FLUORIDE	Flouride	Alfonso Fritsch	D1208	Preventive	8	\$ 97.00	
SEALANT-PER TOOTH	Flouride	Alfonso Fritsch	D1351	Preventive	4	\$ 140.00	
RESIN-THREE SURFACES, ANTERIOR	Flouride	Alfonso Fritsch	D2332	Restorative	1	\$ 158.00	
RESIN-BASED COMPOSITE-ONE SURFACE, POST.	Flouride	Alfonso Fritsch	D2391	Restorative	6	\$ 490.72	
RESIN-BASED COMPOSITE-TWO SURFACE, POST.	Flouride	Alfonso Fritsch	D2392	Restorative	7	\$ 821.00	
RESIN-BASED COMPOSITE-THREE SURF., POST.	Flouride	Alfonso Fritsch	D2393	Restorative	34	\$ 6,375.28	
D2740 CROWN-PORCELAIN/CERAMIC SUBSTRATE	Flouride	Alfonso Fritsch	D2740	Crowns	9	\$ 4,851.00	

The tab 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 a service name, code, or type to see the count, total fee, or % of TTL

Use the Line of Business Filter to filter the results.

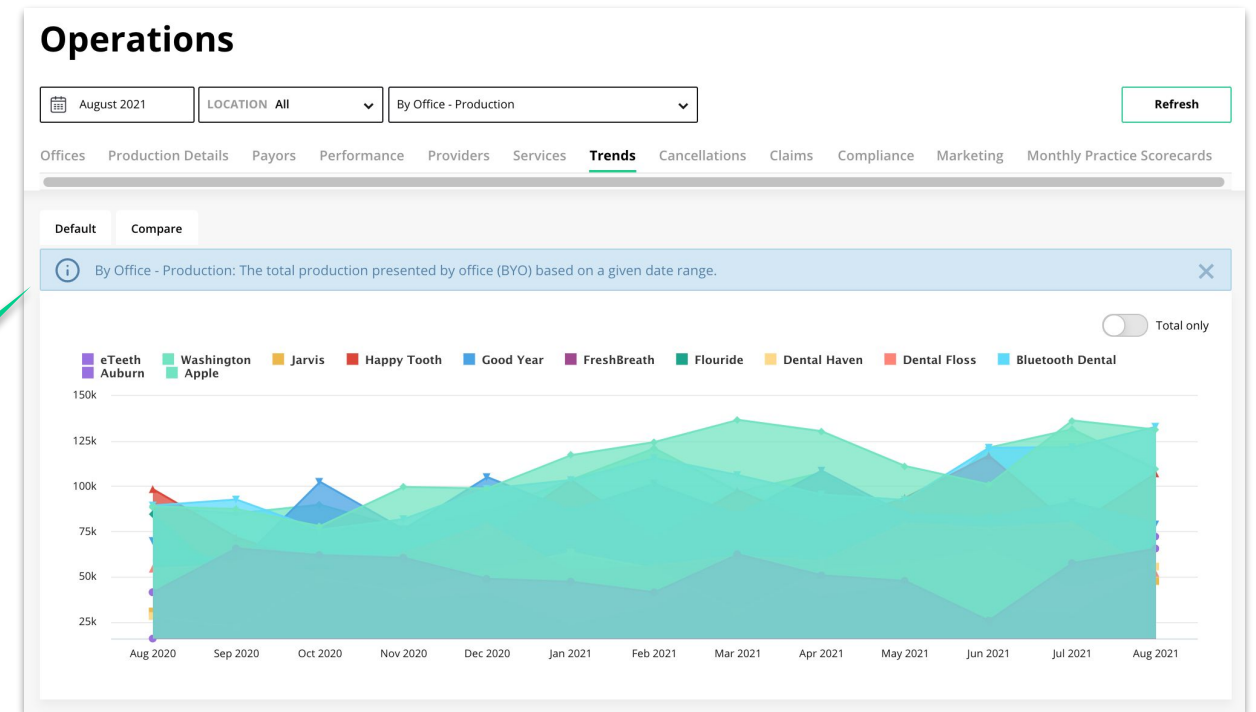


# Operations (Trends)

The **Trends Tab** displays the trailing 12 months reports with numerous views.

- Hover over the graph to see the data points for different months in time.
- Use the datepicker to select different 12 month ranges.
- Use the column headers too fort the offices in ascending or descending order for each month

**Jarvis Tip!**  
We provide the  
definition for each  
of our trends above  
the graph



# Operations (Cancellations)

The **Cancellations Tab** displays all appointment cancellations by office in the date range selected.

Users can drill down into the Cancellations to see the breakdown of cancelled patients

This view will show metrics like:

- Number of Cancellations
- Cancellation Dollar Amount
- Amount of Cancelled appointments that were rescheduled
- The Dollar amount associated with the rescheduled appointments
- The Cancellation and Rescheduled %

Location	Cancellation	Cancellation \$	Cancellation Rescheduled	Cancellation Rescheduled \$	% Cancellation	% Rescheduled	Total Appointments Count
110 Dental and Orthodontics	17	\$ 9,068.48	5	\$ 1,381.00	6.75%	29.41%	252
Weighted Average:	17	\$ 9,068.48	5	\$ 1,381.00	6.75%	29.41%	252
Total:	17	\$ 9,068.48	5	\$ 1,381.00	-	-	252

# Operations (Claims & Compliance)

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

January 2021

LOCATION 8

Refresh

OfficesProduction DetailsPayorsPerformanceProvidersServicesTrendsCancellations**Claims**ComplianceMarketing

Top 20%Mid TierBottom 20%

SearchExport CSV

Location	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Apple	Y	Y	N	N	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y
Flouride	Y	Y	N	N	N	Y	N	Y	N	Y	Y	N	Y	N	Y	Y	Y	Y	N	Y
Auburn	Y	Y	N	N	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	Y	Y
Washington	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y
Bluetooth Dental	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y
Happy Tooth	Y	N	Y	Y	N	Y	Y	Y	Y	Y	N	N	Y	N	Y	Y	Y	Y	N	Y
Good Year	Y	Y	Y	N	N	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	Y
Jarvis	Y	N	Y	N	N	Y	N	Y	N	Y	Y	N	Y	Y	Y	N	Y	N	N	Y

Operations

Jan 01, 2021 - Jan 21, 2021

LOCATION 8

Refresh

OfficesProduction DetailsPayorsPerformanceProvidersServicesTrendsCancellations**Compliance**Marketing

Top 20%Mid TierBottom 20%

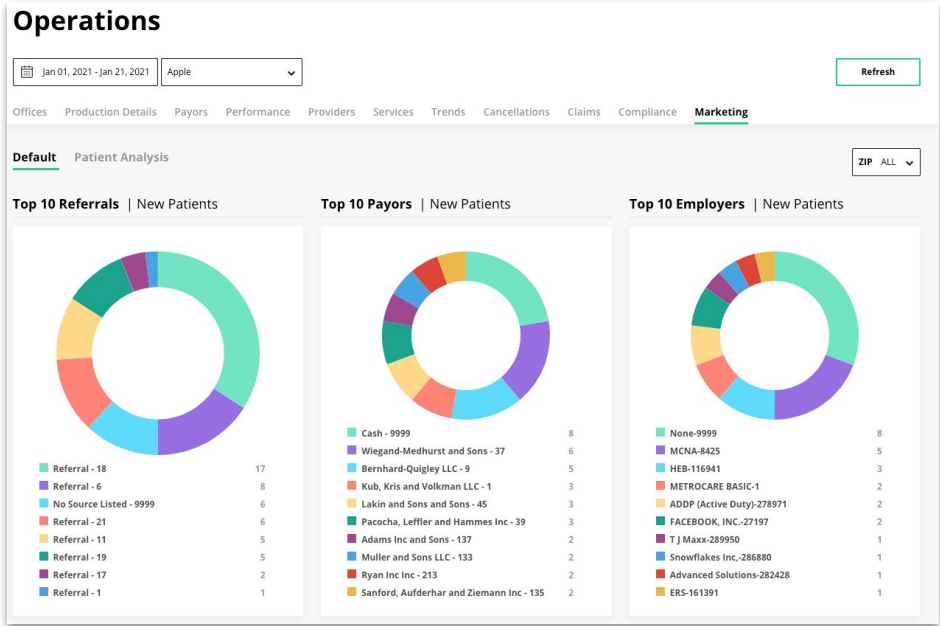
SearchExport CSV

Location	Provider	Provider		Per Working Day		Per Patient Visit			
		Production	Patients Visits	Production	Procedures	Production	Procedures	Fillings	Crowns
Jarvis	Conn, Mack	\$ 5,271.03	81	\$ 479.18	14.55	\$ 65.07	1.98	0.00	0.00
Jarvis	Heidenreich, Florida	\$ 1,179.01	8	\$ 1,179.01	19.00	\$ 147.38	2.38	0.00	0.00
Jarvis	Reichert, Dahlia	\$ 1,523.56	0	\$ 0	0.00	\$ 0	0.00	0.00	0.00
Jarvis	Volkman, Abigail	\$ (6,400.04)	6	\$ 0	0.00	\$ (1,066.67)	1.17	0.00	0.00
Jarvis	Schoen, Mariano	\$ (2,133.22)	3	\$ 0	0.00	\$ (711.07)	2.67	0.00	0.33
Jarvis	Daniel, Jesus	\$ 37,168.31	132	\$ 3,097.36	35.92	\$ 281.58	3.27	0.70	0.08
Jarvis	Damore, Quinten	\$ (74.00)	2	\$ 0	0.00	\$ (37.00)	1.00	0.00	0.00
Jarvis	Ryan, Rodrigo	\$ 90.90	0	\$ 0	0.00	\$ 0	0.00	0.00	0.00
Flouride	Klocko, Benny	\$ (562.23)	0	\$ 0	0.00	\$ 0	0.00	0.00	0.00
Flouride	Fritsch, Aurelio	\$ 0	1	\$ 0	0.00	\$ 0	1.00	0.00	0.00
Flouride	Purdy, Crystal	\$ (2,428.40)	0	\$ 0	0.00	\$ 0	0.00	0.00	0.00
Flouride	Lockman, Martin	\$ 0	1	\$ 0	0.00	\$ 0	1.00	0.00	0.00

The **Compliance Report** shows production, patient visits and provider level data, like the ratio of procedures per patient visit.

# Operations (Marketing)

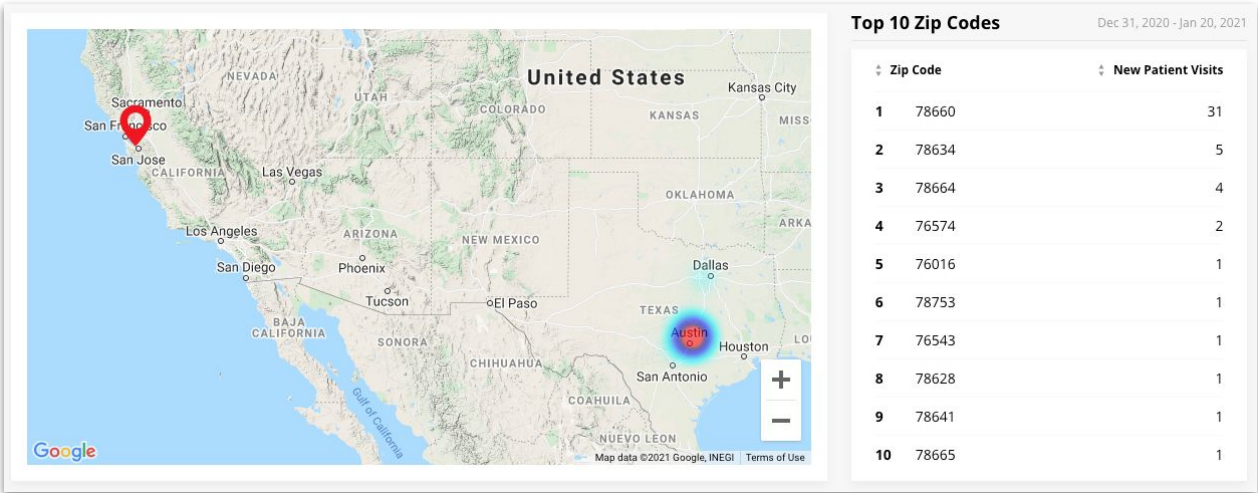
The **Marketing Report** has two sub reports: (1) Default and (2) guest Analysis. This report is also available in the Marketing Module.



The charts display the top 10 referrals, payors, and employees for New patients within the date range.

## Heatmap

Displays a map with varying temperatures that will help you determine where your new patients originate from.



## Top 10 Zip Codes

Lists the top zip codes where your new patients reside.

# Operations (Marketing)

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

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

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

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

Payors - New Patients

Payors - Existing

Referrals - New Patients

Referrals - Existing

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Payor	Production	Npts Visits	Production per Patient	AVG Lifetime Visits	AVG Lifetime Production	% of TTL
Adams Inc and Sons - 137	\$ 211.00	2	\$ 105.50	2	\$ 655.00	4.00%
Adams-Wintheiser Inc - 166	\$ 46.00	1	\$ 46.00	1	\$ 46.00	2.00%
Bauch Group and Sons - 143	\$ 762.00	1	\$ 762.00	1	\$ 762.00	2.00%
Bernhard-Quigley LLC - 9	\$ 6,939.00	5	\$ 1,387.80	1	\$ 1,287.80	10.00%
Braun, Damore and Sauer LLC - 2	\$ 186.00	1	\$ 186.00	1	\$ 186.00	2.00%
Braun-Hahn LLC - 152	\$ 201.00	1	\$ 201.00	1	\$ 201.00	2.00%
Cash - 9999	\$ 589.00	8	\$ 73.63	1	\$ 73.63	16.00%
Donnelly Group Group - 214	\$ 4,000.00	1	\$ 4,000.00	1	\$ 4,000.00	2.00%
Donnelly-Champlin Inc - 121	\$ 269.00	1	\$ 269.00	1	\$ 269.00	2.00%
Emmerich-Goldner and Sons - 61	\$ 2,404.00	1	\$ 2,404.00	1	\$ 2,404.00	2.00%
Hayes-Lehner and Sons - 6	\$ 161.00	1	\$ 161.00	1	\$ 161.00	2.00%
Kub, Kris and Volkman LLC - 1	\$ 5,157.10	3	\$ 1,719.03	1	\$ 1,719.03	6.00%
Lakin and Sons and Sons - 45	\$ 560.31	3	\$ 186.77	1	\$ 253.78	6.00%
Muller and Sons LLC - 133	\$ 1,065.90	2	\$ 532.95	1	\$ 532.95	4.00%
Pacocha, Leffler and Hammes Inc - 39	\$ 1,893.00	3	\$ 631.00	1	\$ 631.00	6.00%
Robel LLC LLC - 24	\$ 1,112.88	1	\$ 1,112.88	1	\$ 1,112.88	2.00%
Runofsdottir Inc and Sons - 128	\$ 140.00	1	\$ 140.00	1	\$ 140.00	2.00%
Ryan Inc Inc - 213	\$ 355.00	2	\$ 177.50	2	\$ 2,280.00	4.00%
Sanford, Aufderhar and Ziemann Inc - 135	\$ 1,184.00	2	\$ 592.00	1	\$ 632.00	4.00%
Schmeler, Hahn and Romaguera Group - 109	\$ 981.00	1	\$ 981.00	1	\$ 981.00	2.00%
Total:	\$ 32,990.06	50		26	\$ 21,548.20	100.00%

Items per page201-20 of 24 items

1of 2 pages<>

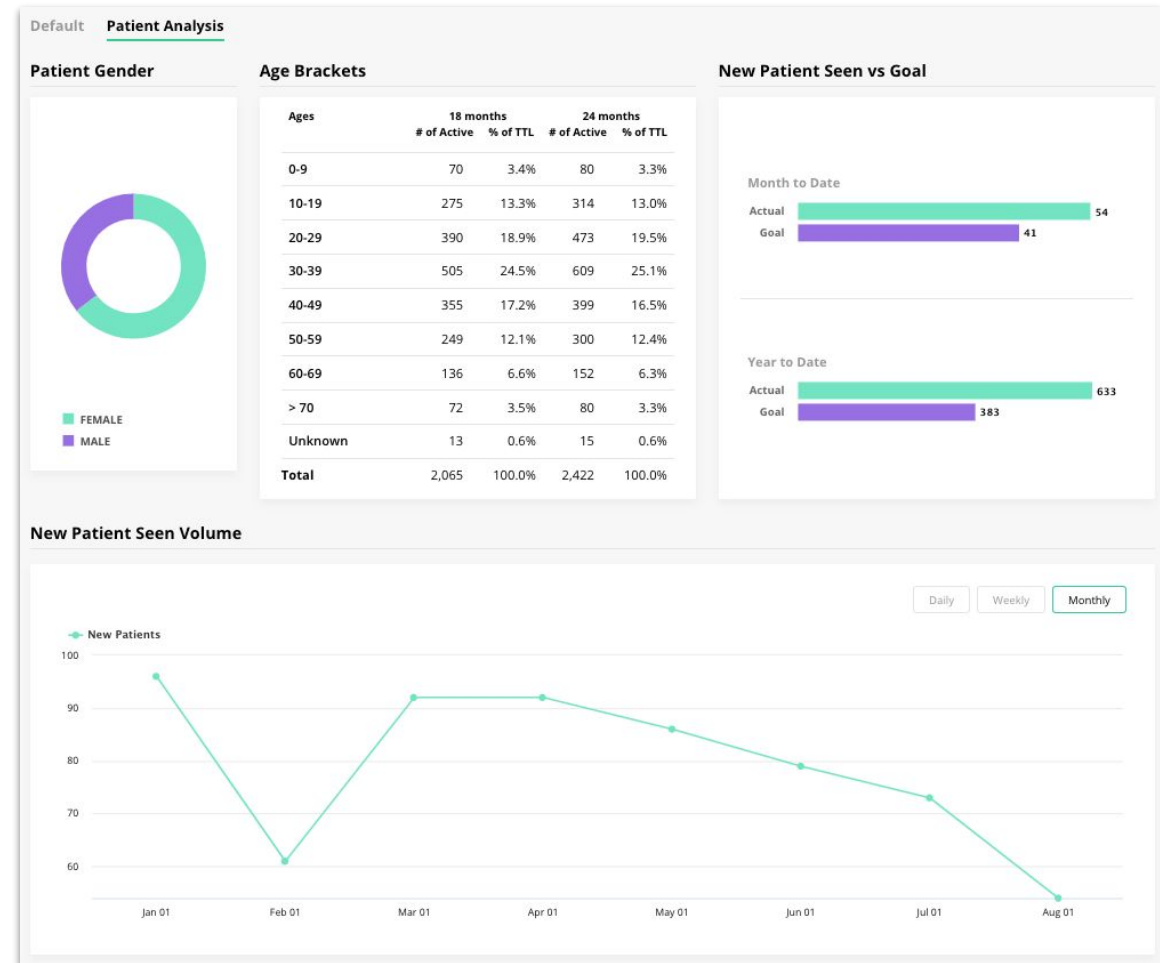
# Operations (Marketing | Patient Analysis)

**Patient Analysis** tab provides analytics on patient data for each location.

These metrics include

- *Patient Gender*
- *Age Brackets*
- *New Patients seen vs. Goal*

The **New Patient Seen Volume** graph displays the number of new patients seen by a daily, weekly, or monthly view.





# Operations (Monthly Practice Scorecards)

The **Monthly Practice Scorecard** shows month over month, the below metrics

- BYO Doctor Production
- BYO Hygienist Production
- BYO NPT Visits
- Doc Production per Exam
- HYG Avg. SRP per Day
- HYG Appointments
- HYG Pts Visits
- HYG Perio Appointments
- HYG Retention Past 12mo Adult
- Production per Exam
- HYG Retention Past 12mo Kids
- PWD Production

## Operations

February 2021

Apple

Refresh

Offices

Production Details

Payors

Performance

Providers

Services

Trends

Cancellations

Claims

Compliance

Marketing

Monthly Practice Scorecards

Default

Diff Last Year

Percent Diff Last Year

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Entities	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	
BYO Doctor Production	\$ 85,818.92	\$ 67,317.86	\$ 75,929.73	\$ 85,493.40	\$ 87,855.16	\$ 115,030.89	\$ 78,019.53	\$ 119,709.05	\$ 100,461.01	\$ 74,333.72	\$ 1
BYO Hygienist Production	\$ 4,935.47	\$ 3,637.85	\$ 28.60	\$ (30.60)	\$ 0	\$ 11,778.96	\$ 10,147.54	\$ 10,858.22	\$ 13,299.08	\$ 12,731.38	\$
BYO NPT Visits	62	97	78	86	75	100	68	86	91	86	
Doc Production per Exam	\$ 1,505.60	\$ 679.98	\$ 671.94	\$ 667.92	\$ 645.99	\$ 635.53	\$ 655.63	\$ 965.40	\$ 660.93	\$ 571.80	
HYG Reappointments	0	80	70	61	66	73	72	86	92	80	
HYG Avg. SRP per Day	0.69	0.88	0.00	0.00	0.00	1.05	1.77	1.38	2.23	2.47	
HYG Perio Reappointments	-	94.29%	86.67%	80.77%	80.00%	82.50%	93.33%	89.09%	85.11%	84.91%	
HYG Pts Visits	76	112	104	112	116	158	109	124	127	125	
HYG Retention Past 12mo Adult	-	39.53%	48.00%	43.75%	59.49%	52.25%	57.75%	49.38%	63.53%	39.02%	
HYG Retention Past 12mo Kids	-	37.50%	63.64%	50.00%	23.53%	21.74%	71.43%	25.00%	18.18%	42.86%	
Production per Exam	\$ 509.86	\$ 263.78	\$ 324.61	\$ 314.20	\$ 327.82	\$ 354.22	\$ 331.46	\$ 476.52	\$ 362.29	\$ 304.42	
PWD Production	\$ 1,592.18	\$ 1,267.07	\$ 1,687.96	\$ 1,987.51	\$ 2,311.98	\$ 1,457.58	\$ 1,277.78	\$ 1,740.90	\$ 1,625.14	\$ 1,339.46	

# Patient Portal

Patient Portal

Apple

Refresh

Patients

Reminders

Performance

Additional Filters (0)

+ Add Filter

Save

Reset

Search

Search

Export CSV

<input type="checkbox"/>	Patient Name	Patient ID	Age	Gender	Address	City	State	ZIP	Work Phone	Email	First Visit Date
<input type="checkbox"/>	Abbott, Sedrick	1002				Throughwayton	TX	78660	462-876-3	taureankunze@kuvalis.org	N/A
<input type="checkbox"/>	Abbott, Virginia	1073	56			Dividestad	TX	78660	1-848-512	chanelwindler@tromp.biz	Jun 16, 2018
<input type="checkbox"/>	Abbott, Angelo	1767	44			Lakesfurt	TX	78660	465-800-7	breanablock@langworth.name	Dec 22, 2018
<input type="checkbox"/>	Abbott, Gudrun	2373	24			Cornerberg	TX	78660	(282)132-	olivereichmann@harris.com	Jun 15, 2019
<input type="checkbox"/>	Abbott, Wilber	737				Islebury	TX	78660	(824)160-	othomarks@vandervort.io	N/A
<input type="checkbox"/>	Abbott, Kaylah	766	17			Prairieland	TX	78664	668-802-3	aimeeoreilly@kerluke.com	Apr 17, 2018

The **Patient Portal** module displays the list of all patients per office location. 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.

To create a *filter* follow the steps below!

1. Select desired *Filter* From Drop Down
2. Select the Condition and the Value

+ Add Filter

Save

Search

Q

AGE

BALANCE

BROKEN VISITS

COMPLETED PROCEDURE

FIRST SEEN

FUTURE VISIT

FUTURE HYG VISIT

GENDER

HYGIENE DUE

LAST SEEN

Age Filter

X

Condition

Select A Condition

Age

Cancel

Add

3. Congratulations, you have created a filter!

+ Add Filter

Save

AGE Greater 20

X



# Patient portal (reminders)

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

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

Patient Portal

Jan 01, 2021 - Jan 20, 2021

Apple

Refresh

Patients

Reminders

Performance

Reminder Types

Assigned To

Past Due Only

Search Patients

Export CSV

Patient Name	Type	Status	Notes	Assigned User	Real Attempts	Est
Hartmann, Tracy	Hygiene Recare	Contacted and scheduled	Scheduled for 6/26	Jarvis Analytics	6	\$ 165
Friesen, Jakayla	Hygiene Recare	Untouched	Reminder add from hygiene-recall module.	chester	0	\$ 0
Schmidt, Vella	Hygiene Recare	Untouched	Reminder add from hygiene-recall module.	Jarvis Analytics	0	\$ 0
Keebler, Herminia	Hygiene Recare	Untouched	Reminder add from hygiene-recall module.		0	\$ 0
Lesch, Madie	Hygiene Recare	Untouched	Reminder add from hygiene-recall module.	Jarvis Analytics	0	\$ 0
Ankunding, Lilly	Past Due Account	Untouched	did not collect balance at TOS	melissa	0	\$ 3.0k
Jacobson, Destin	Unscheduled Treatment	Untouched	Vic please contact	vicjarvis	0	\$ 2.0k
Doyle, Shany	Past Due Account	Untouched	Plase contact to collect	vicjarvis	0	\$ 132

Each reminder has a corresponding actions: **update due**, **assign reminder**, **update reminder**, and **complete reminder**.

Patient Portal

Apple

Refresh

Patients

Reminders

Performance

Reminder Types

skuehn

Past Due Only

Search Patients

Export CSV

Patient Name	Actions	Type	Status	Notes	Assigned User	Real Attempts	Es
Aufderhar, Burnice	...	Unscheduled Treatment	Untouched	Added reminder from RCM claim submissions	Sarah	0	\$ 0
, Claudia Alvarez	Update Reminder	Unscheduled Broken Appointment	Untouched		Sarah	0	\$ 0
, Jeffery Love	Update Due	Unscheduled Broken Appointment	Untouched		Sarah	0	\$ 0
Raynor, Kayley	Assign Reminder	Unscheduled Treatment	Untouched		Sarah	0	\$ 1k
Green, Dayna	Delete Reminder	Unscheduled Broken Appointment	Untouched		Sarah	0	\$ 1k

Items per page

10

1-5 of 5 items

1

of 1 pages

<

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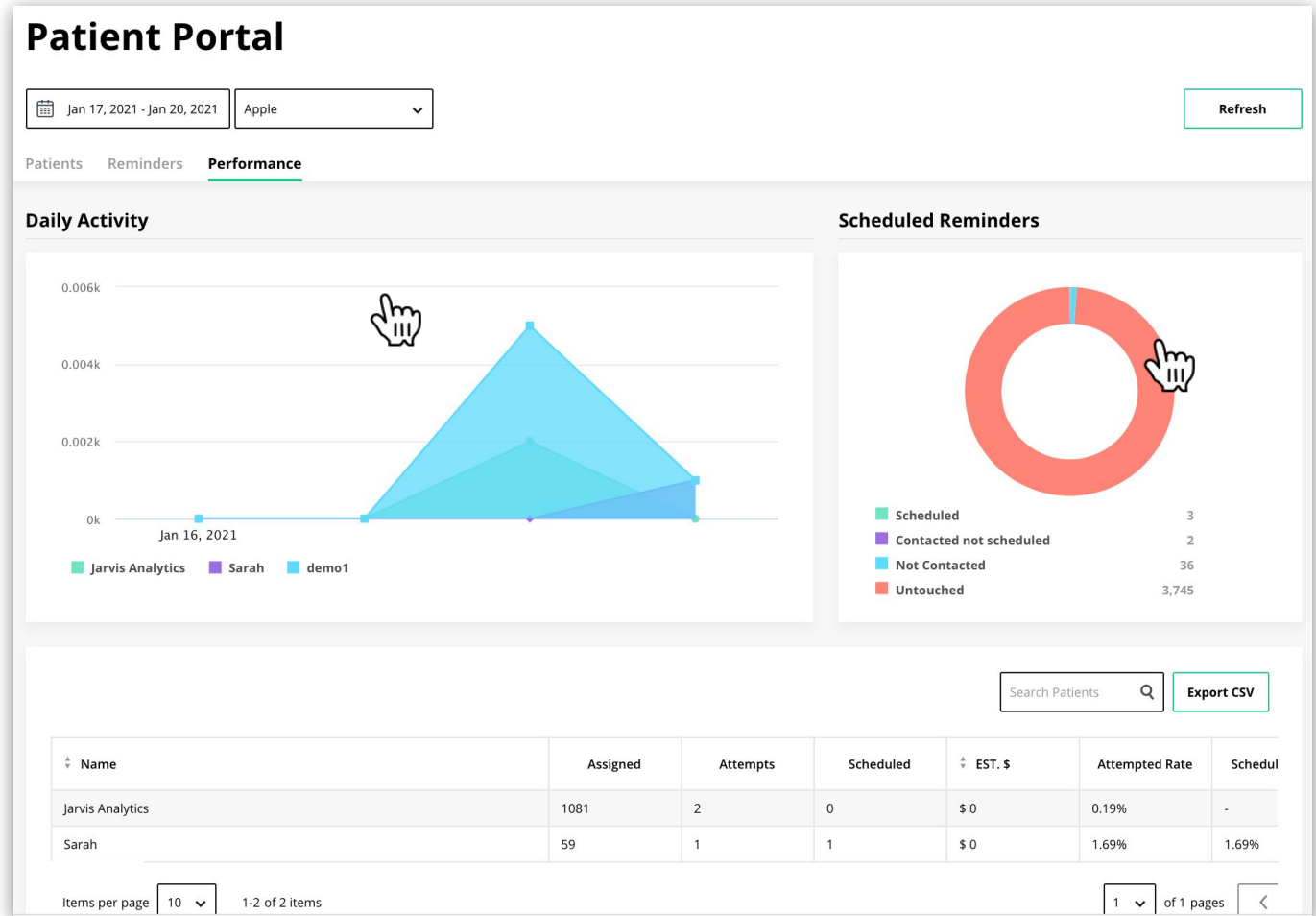
# Patient portal (performance)

The **Performance tab** displays the graph for activity within the date range selected.

- The pie chart displays the percentage of scheduled, contacted not scheduled, not contacted and untouched reminders.
- The Daily Activity Graph shows the number of reminders completed by a user over the course of the date range
- The table provides a list of all users and their performance.

## Jarvis Tip!

Use the performance view to see who is completing the most reminders



# RCM - Revenue Cycle Management

In this module contains Seven tabs: **Claim Submission, Payment Arrangement, Patients Statements, Point of Service Collection, Adjustments, Dashboard, and Collection Refund**

You can select which month you want to display by using the **Date picker**.

You have the ability to download data by clicking on the **Export CSV** button.

To search for data, enter any words that you think matches your desired result in the search bar

Click on the **column headers** to sort the data on the table.

**RCM**

February 2021 | Apple | Refresh

Claim Submissions | Payment Arrangement | Patients Statements | Point Of Service Collection | Adjustment | Dashboard | Collection Refund

Top 20% | Mid Tier | Bottom 20%

Search | Export CSV

<input type="checkbox"/>	Patient	Patient ID	Office	Date Created	Date Submitted	Last Visit Date	Date of Service	Claim Lag Days	Tat Days	Days Outstanding	Ch Lag
<input type="checkbox"/>	Adams, Amaya	4738	Apple	2020-02-19	2020-02-28	2021-02-04	2021-02-04	351	0	363	342
<input type="checkbox"/>	Armstrong, Devante	1389	Apple	2020-02-21	2020-02-26	2021-02-20	2021-02-06	351	0	365	346
<input type="checkbox"/>	Aufderhar, Frederick	1003	Apple	2020-03-07	2020-03-09	2021-02-21	2021-02-21	351	0	353	349
<input type="checkbox"/>	Aufderhar, Jailyn	1977	Apple	2020-02-03	2020-02-28	2021-02-17	2021-02-03	366	0	363	341
<input type="checkbox"/>	Aufderhar, Jailyn	1977	Apple	2020-01-27	2020-03-03	2021-02-17	2021-02-03	373	0	359	337
<input type="checkbox"/>	Bartell, Jay	4318	Apple	2020-03-09		2021-02-23	2021-02-23	351	0	0	0
<input type="checkbox"/>	Bartell, Jay	4318	Apple	2020-03-09		2021-02-23	2021-02-23	351	0	0	0
<input type="checkbox"/>	Barton, Kiana	4742	Apple	2020-02-24	2020-02-26	2021-02-09	2021-02-09	351	0	365	349
<input type="checkbox"/>	Barton, Onie	4745	Apple	2020-03-07	2020-03-09	2021-02-21	2021-02-21	351	0	353	349
<input type="checkbox"/>	Barton, Onie	4745	Apple	2020-03-07	2020-03-09	2021-02-21	2021-02-21	351	0	353	349
<input type="checkbox"/>	Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-02-14	2021-02-14	351	0	359	348
<input type="checkbox"/>	Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-02-14	2021-02-14	351	0	359	348
<input type="checkbox"/>	Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-02-14	2021-02-14	351	0	359	348

# RCM - Revenue Cycle Management

**Claim Submissions:** Displays claim details for the chosen Month and Year.

**RCM**

January 2021 Apple Refresh

Claim Submissions Payment Arrangement Patients Statements Point Of Service Collection Adjustment Dashboard

Top 20% Mid Tier Bottom 20% Search Export CSV

Patient	Patient ID	Office	Date Created	Date Submitted	Last Visit Date	Date of Service	Claim Lag Days	Tat Days	Days Outstanding	Charge Lag Days
Armstrong, Devante	1389	Apple	2020-02-21	2020-02-26	2021-01-16	2021-01-02	316	0	329	311
Aufderhar, Frederick	1003	Apple	2020-03-07	2020-03-09	2021-01-17	2021-01-17	316	0	317	314
Bartell, Jay	4318	Apple	2020-03-09		2021-01-19	2021-01-19	316	317	0	0
Bartell, Jay	4318	Apple	2020-03-09		2021-01-19	2021-01-19	316	317	0	0
Barton, Kiana	4742	Apple	2020-02-24	2020-02-26	2021-01-05	2021-01-05	316	0	329	314
Barton, Onie	4745	Apple	2020-03-07	2020-03-09	2021-01-17	2021-01-17	316	0	317	314
Barton, Onie	4745	Apple	2020-03-07	2020-03-09	2021-01-17	2021-01-17	316	0	317	314
Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-01-10	2021-01-10	316	0	323	313
Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-01-10	2021-01-10	316	0	323	313
Baumbach, Annabell	4703	Apple	2020-02-29	2020-03-03	2021-01-10	2021-01-10	316	0	323	313
Baumbach, Rodolfo	4018	Apple	2020-02-20	2020-02-26	2021-01-16	2021-01-01	316	0	329	310
Bayer, Waylon	4786	Apple	2020-03-04	2020-03-09	2021-01-14	2021-01-14	316	0	317	311

**Payment Arrangement:** Reflects payments arrangements that have been created within the Practice Management System.

**RCM**

January 2021 Apple Refresh

Claim Submissions **Payment Arrangement** Patients Statements Point Of Service Collection Adjustment Dashboard

Top 20% Mid Tier Bottom 20% Search Export CSV

Patient	Patient ID	Office	Line of Business	Start Date	Creation Date	Last Pay Date	Loan Amount	Payment Frequency	Number of Payments	Installment Amount
Collins, Penelope	1734	Apple	General	2020-02-15	2019-12-14		\$ 596.40	12	1	\$ 596.40
Lind, Brandyn	2611	Apple	General	2019-05-15	2019-04-29	2019-10-16	\$ 736.70	12	6	\$ 122.78
Hane, Carlotta	2917	Apple	Not Set	2019-04-15	2019-03-19	2020-01-15	\$ 3,120.00	12	14	\$ 222.86
Christiansen, Coleman	3095	Apple	General	2020-04-01	2020-03-02		\$ 358.00	12	1	\$ 358.00
Dickens, Alberta	3108	Apple	General	2020-04-01	2020-03-02		\$ 1,727.25	12	10	\$ 172.72
Stanton, Shaun	3197	Apple	General	2019-07-15	2019-07-05	2020-01-31	\$ 2,083.33	12	15	\$ 138.89
Funk, Karli	3481	Apple	General	2019-10-15	2019-10-07	2020-01-15	\$ 1,280.42	12	15	\$ 85.36
Armstrong, Astrid	3485	Apple	General	2020-01-15	2019-12-31		\$ 333.60	12	4	\$ 83.40
DuBuque, Pedro	3966	Apple	General	2020-03-05	2020-03-06		\$ 434.50	12	1	\$ 434.50
Baumbach, Rodolfo	4018	Apple	General	2020-03-16	2020-02-17		\$ 211.50	12	1	\$ 211.50
Kunde, Rusty	4099	Apple	General	2020-04-01	2020-03-06		\$ 300.80	12	1	\$ 300.80
Jerde, Nadia	4196	Apple	General	2019-11-15	2019-11-09		\$ 36.20	12	1	\$ 36.20
Schoen, Lela	4213	Apple	General	2019-11-15	2019-11-11		\$ 350.00	12	1	\$ 350.00
Fisher, Remington	4296	Apple	General	2020-03-15	2020-02-25		\$ 119.30	12	1	\$ 119.30
Huels, Madisyn	4321	Apple	Not Set	2019-12-01	2019-11-04	2020-03-02	\$ 2,223.00	12	18	\$ 123.50

# RCM - Revenue Cycle Management

**Patients Statements:** Shows any statements generated in your PMS  
*Not available for Dentrix and Denticon PMS locations.*

RCM

January 2021

Apple

Refresh

Claim Submissions

Payment Arrangement

Patients Statements

Point Of Service Collection

Adjustment

Dashboard

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Patient	Patient ID	Office	Line of Business	Statement Date	Balance Due Now	Due Date
No Data						

**Point of Service Collection**  
Shows if payments are being collected at the time of service or what % of payments

RCM

January 2021

Apple

Refresh

Claim Submissions

Payment Arrangement

Patients Statements

Point Of Service Collection

Adjustment

Dashboard

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Patient	Patient ID	Office	Claim ID	Date of Service	Provider ID	Provider	Line of Business	Service Code
Baumbach, Rodolfo	4018	Apple	12390	2021-01-01	B32	Trevor Welch	General	D0330
Champlin, Darrell	4500	Apple	12397	2021-01-01	TJD	Aracely Robel	General	FRCTS
Cole, Hiram	4568	Apple	12389	2021-01-01	TJD	Aracely Robel	General	D2393, D2391
Fahey, Jimmie	3786	Apple	0	2021-01-01	INV	Myrtice Nader	General	DELIN
Feil, Molly	4525	Apple	0	2021-01-01	SH	Shakira Larkin	General	POSTO
Hagenes, Lisette	3571	Apple	0	2021-01-01	TJD	Aracely Robel	General	SEAT
Harris, Estrella	3749	Apple	12398	2021-01-01	TJD	Aracely Robel	General	D2392
Harris, Estrella	3749	Apple	12399	2021-01-01	B32, SH, TJD	Trevor Welch   Shakira Larkin   Aracely Robel	General	D0274, D1110, D0120
Harris, Estrella	3749	Apple	12400	2021-01-01	TJD	Aracely Robel	General	SMILE
Heller, Jayde	4760	Apple	12395	2021-01-01	B32, TJD	Trevor Welch   Aracely Robel	General	D0274, D0150
Heller, Jayde	4760	Apple	12396	2021-01-01	B32	Trevor Welch	General	D0330
Hills, Garth	3942	Apple	12402	2021-01-01	SH, TJD, B32	Shakira Larkin   Aracely Robel   Trevor Welch	General	D1120, D0120, D1208,
Ledner, Cortez	4746	Apple	0	2021-01-01	TJD	Aracely Robel	General	D3999

# RCM - Revenue Cycle Management

**Adjustments:** Shows all adjustments that occurred during the month selected in the date picker. These includes the adjustment type and any notes

RCM

January 2021

Apple

Refresh

Claim Submissions

Payment Arrangement

Patients Statements

Point Of Service Collection

Adjustment

Dashboard

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

⚡ Patient	⚡ Patient ID	⚡ Office	⚡ Date	⚡ Provider ID	⚡ Provider	⚡ Adjustment Type	⚡ Amount	⚡ Note
Huel, Makenna	1927	Apple	2021-01-01	TJD	Robel, Aracely	Fee Schedule Error	\$ 64.00	
Huel, Makenna	1927	Apple	2021-01-01	TJD	Robel, Aracely	Undefined	\$ (64.00)	
Huel, Makenna	1927	Apple	2021-01-01	JC,TJD	Tremblay, Macie,Robel, Aracely	Fee Schedule Error	\$ (64.00)	
Schoen, Coty	4323	Apple	2021-01-01	B32,OO	Welch, Trevor,Cassin, Cortez	TREATMENT PLAN CHANGE	\$ (4,000.00)	
Auer, Adolph	235	Apple	2021-01-01	B32	Welch, Trevor	Patient Refund	\$ 117.00	
Auer, Adolph	235	Apple	2021-01-01	B32	Welch, Trevor	Undefined	\$ (117.00)	
Auer, Adolph	235	Apple	2021-01-01	B32	Welch, Trevor	Patient Refund	\$ 133.00	
Jacobi, Morris	2777	Apple	2021-01-02	B32	Welch, Trevor	medicaid Adjustment	\$ 5.00	
Jacobi, Morris	2777	Apple	2021-01-02	B32	Welch, Trevor	Undefined	\$ (5.00)	
Jacobi, Morris	2777	Apple	2021-01-02	TJD	Robel, Aracely	medicaid Adjustment	\$ (5.00)	
Schoen, Coty	4323	Apple	2021-01-02	B32	Welch, Trevor	Patient Refund	\$ 850.00	
Paucek, Dewitt	9	Apple	2021-01-05	B32	Welch, Trevor	Fee Schedule Error	\$ 44.00	
Paucek, Dewitt	9	Apple	2021-01-05	TJD	Robel, Aracely	Fee Schedule Error	\$ 19.00	
Bosco, Adriana	4625	Apple	2021-01-05	TJD	Robel, Aracely	Fee Schedule Error	\$ 2.00	
Flatley, Royal	4724	Apple	2021-01-05	B32	Welch, Trevor	Fee Schedule Error	\$ 2.00	

## Jarvis Tip!

Use this module view to audit your locations and making sure all adjustments are properly accounted for

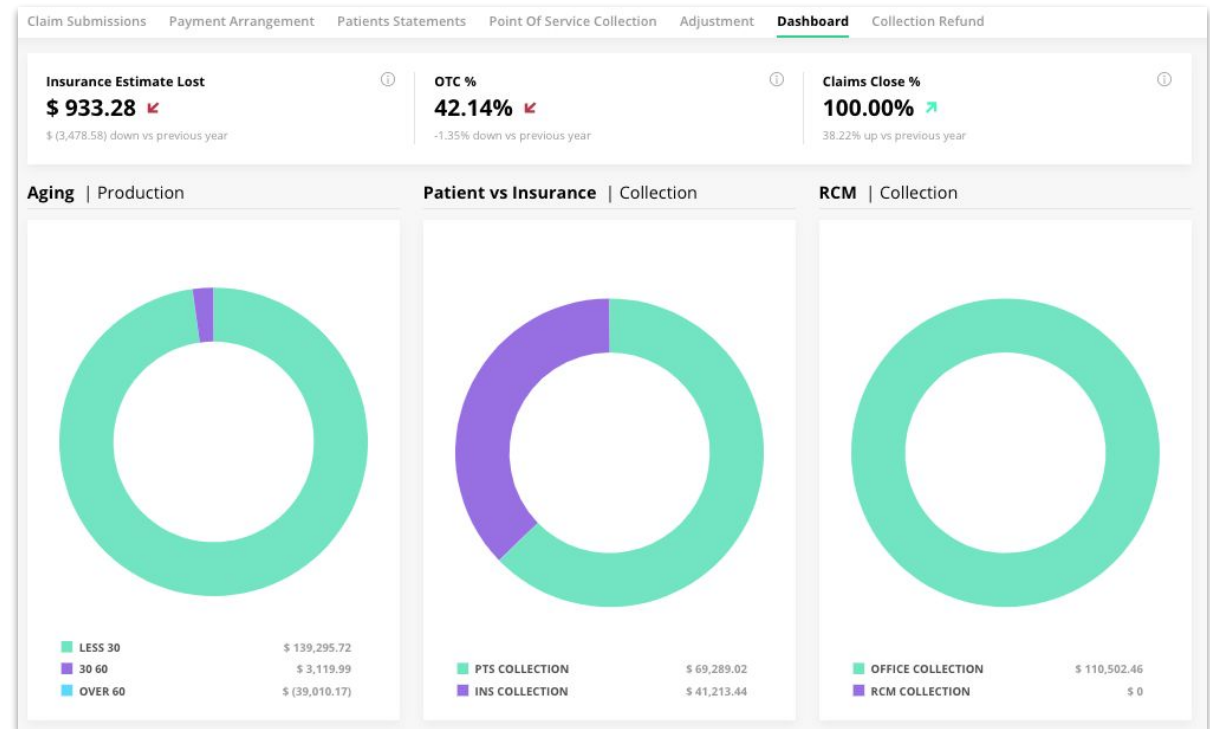
# RCM - Revenue Cycle Management

**Dashboard:** Shows general RCM Data to track how your RCM team is performing. This page has items like

- Insurance Estimate Lost
- Over the Counter / OTC %
- Claims Close %
- Claims Count - Per RCM User
- Claims Performance - Per RCM User
- Claims Outstanding

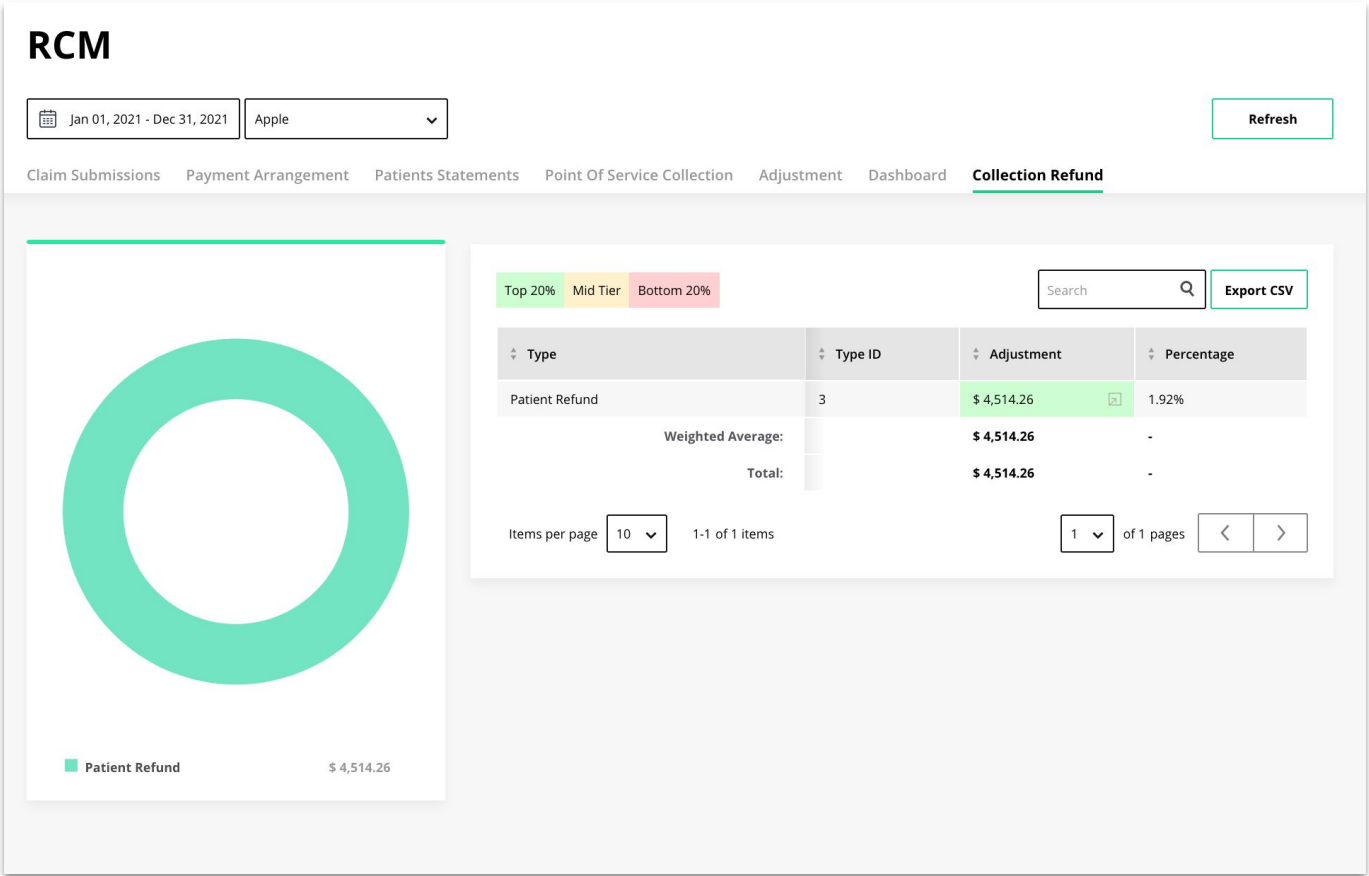
This view also has tables that show

- Adjustment Amounts by Category
- Claims Close by Service Code
  - Sent - Claims that were sent but are not closed
  - Closed - Claims that were sent and closed
  - Denied - Claims that were sent and denied



# RCM - Revenue Cycle Management

**Collection Refund:** Shows all collection refunds and the codes associated with them in the time frame selected in the date picker.





# Snapshot

The **Snapshot Module** displays each location assigned to you and includes Production and Collections data compared to Goals for various Lines of Business.

You can also sort and view these results by Location, by Region and by Brand.

This Module can be configured in the **Configuration Module** to suit each organization's needs

**Jarvis Tip!**  
This is a great daily resource to keep on the pulse of your organization!

## Snapshot

Aug 01, 2021 - Aug 25, 2021 LOCATION All Location

Refresh

Top 20% Mid Tier Bottom 20%

Search Export CSV

Location	Basic							
	Gross Production	Net Production	Collection Rate	Actual + Scheduled Production	Booked less Net Prod	Retention Rate	General Patients per Day	Collection Day
Apple	\$ 109,284.37	\$ 103,797.23	0.00%	\$ 120,302.87	\$ 16,505.64	52.48%	2	\$ 5,815.92
Dental Haven	\$ 42,216.30	\$ 38,727.16	0.00%	\$ 53,710.49	\$ 14,983.33	60.06%	9	\$ 3,115.06
Auburn	\$ 53,986.19	\$ 51,567.88	0.00%	\$ 69,949.67	\$ 18,381.79	77.37%	11	\$ 2,573.96
FreshBreath	\$ 53,986.19	\$ 51,567.88	0.00%	\$ 69,949.67	\$ 18,381.79	77.37%	11	\$ 2,573.96
Dental Floss	\$ 36,378.08	\$ 35,855.32	0.00%	\$ 48,046.08	\$ 12,190.76	66.14%	12	\$ 3,009.99
Flouride	\$ 43,189.38	\$ 38,568.36	0.00%	\$ 50,660.04	\$ 12,091.68	51.27%	9	\$ 4,653.09
Unsupported PMS 1	\$ 0	\$ 0	0.00%	\$ 0	\$ 0	0.00%	0	\$ 0
Good Year	\$ 61,321.65	\$ 58,479.30	0.00%	\$ 76,164.75	\$ 17,685.45	82.91%	13	\$ 3,357.15
Jarvis	\$ 39,879.58	\$ 42,340.30	0.00%	\$ 63,026.58	\$ 20,686.28	75.08%	11	\$ 4,052.45
Happy Teeth	\$ 70,499.65	\$ 60,411.04	0.00%	\$ 81,177.51	\$ 20,766.47	48.73%	12	\$ 5,202.66

# TX Miner

## Treatment Miner

September 2021

Apple

☐ Exclude Rejected TX plans ⓘ

Refresh

Provider(s)

Select a Provider

Procedure(s)

Select a Procedure

Patient(s)

Select a Patient

Line Of Business(es)

Line of Business: All

Top 20%

Mid Tier

Bottom 20%

Export CSV

Month	Total TX Plan	Pending Scheduled	Pending Unscheduled	Active Production	Percent Closed	# TX Plan Presented	Avg \$/TX Plan	% Pts w/TX Plan
September 2020	\$ 573,197.71	\$ 4,085.63	\$ 477,460.59	\$ 91,651.49	18.26%	223	\$ 2,570.39	85.5
October 2020	\$ 272,376.29	\$ 20,200.18	\$ 170,023.21	\$ 82,152.90	37.86%	131	\$ 2,079.21	76.8
November 2020	\$ 224,696.71	\$ 6,507.48	\$ 135,201.32	\$ 82,987.91	40.34%	90	\$ 2,496.63	73.5
December 2020	\$ 370,839.63	\$ 7,286.89	\$ 256,159.35	\$ 107,393.39	31.39%	143	\$ 2,593.28	84.7
January 2021	\$ 316,968.43	\$ 5,918.60	\$ 216,532.60	\$ 94,517.23	32.69%	149	\$ 2,127.30	86.6
February 2021	\$ 367,473.83	\$ 6,050.40	\$ 256,760.22	\$ 104,663.21	31.45%	162	\$ 2,268.36	84.7
March 2021	\$ 691,658.79	\$ 4,749.12	\$ 553,274.24	\$ 133,635.43	21.02%	166	\$ 4,166.62	87.5
April 2021	\$ 403,894.63	\$ 10,596.64	\$ 259,255.93	\$ 134,042.06	37.41%	140	\$ 2,884.96	88.8
May 2021	\$ 428,039.50	\$ 9,173.62	\$ 291,875.50	\$ 126,990.38	33.50%	150	\$ 2,853.60	88.7
June 2021	\$ 388,918.38	\$ 11,971.54	\$ 264,981.52	\$ 111,965.32	34.45%	162	\$ 2,400.73	84.3
July 2021	\$ 368,487.45	\$ 13,168.12	\$ 241,365.04	\$ 113,954.29	36.02%	135	\$ 2,729.54	95.4
August 2021	\$ 455,349.35	\$ 15,161.22	\$ 309,696.15	\$ 130,491.98	34.20%	161	\$ 2,828.26	84.4
September 2021	\$ 446,364.01	\$ 18,727.05	\$ 303,035.67	\$ 114,610.20	27.13%	134	\$ 3,500.71	90.0

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

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

The Provider(s), Procedure(s), and Patient(s) filters at the top of the module allow 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. There is an additional filter if you would like to exclude rejected treatment plans as well.

# 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.

Treatment Miner

January 2021

Apple

Refresh

Provider(s)

Procedure(s)

Patient(s)

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Month	Total TX Plan	Pending Scheduled	Pending Unscheduled	Active Production	Percent Closed	# TX Plan Presented	Avg \$/TX Plan	% Pts w/TX Plan
December 2019	\$ 248,797.78	\$ 10,246.34	\$ 253,715.41	\$ 94,784.83	26.42%	189	\$ 1,898.13	78.57%
January 2020	\$ 194,348.37	\$ 13,594.07	\$ 162,090.36	\$ 73,113.35	29.39%	103	\$ 2,415.51	77.29%
February 2020	\$ 422,249.25	\$ 6,294.06	\$ 110,798.97	\$ 77,255.34	39.75%	83	\$ 2,341.55	73.27%
March 2020	\$ 287,979.22	\$ 7,077.11	\$ 296,188.55	\$ 118,983.59	28.18%	160	\$ 2,639.06	85.31%
April 2020	\$ 737,280.03	\$ 6,548.00	\$ 190,262.13	\$ 91,169.09	31.66%	154	\$ 1,869.99	85.88%
May 2020	\$ 314,756.05	\$ 6,145.44	\$ 609,474.51	\$ 121,660.08	16.50%	179	\$ 4,118.88	86.20%
June 2020	\$ 450,392.51	\$ 4,534.26	\$ 196,112.99	\$ 114,108.80	36.25%	134	\$ 2,348.93	86.21%
July 2020	\$ 456,557.06	\$ 12,448.28	\$ 291,744.36	\$ 146,199.87	32.46%	159	\$ 2,832.66	89.55%
August 2020	\$ 348,334.39	\$ 9,706.90	\$ 306,778.30	\$ 140,071.86	30.68%	158	\$ 2,889.60	86.29%
September 2020	\$ 425,294.50	\$ 9,941.54	\$ 238,668.68	\$ 99,724.17	28.63%	153	\$ 2,276.70	85.71%
October 2020	\$ 432,049.67	\$ 12,934.33	\$ 287,982.58	\$ 124,377.59	29.25%	146	\$ 2,912.98	97.14%
November 2020	\$ 357,420.64	\$ 19,179.97	\$ 291,069.66	\$ 121,800.04	28.19%	153	\$ 2,823.85	81.76%
December 2020	\$ 387,246.62	\$ 23,501.49	\$ 242,498.56	\$ 91,420.59	25.58%	93	\$ 3,843.23	90.05%
Avg:	\$ 387,246.62	\$ 10,934.75	\$ 267,491.16	\$ 108,820.71		143		
Total:	\$ 5,034,206.05	\$ 142,151.79	\$ 3,477,385.06	\$ 1,414,669.20		1,864		

Treatment Miner Breakdown

Top 20%

Mid Tier

Bottom 20%

Search

Export CSV

Patient	Chart #	Type	Pending TX \$ Sch	Pending TX \$ USC	Next Visit Date	Referred To	Remaining Benefits	Status	Preferred Provider	Insurance
Anderson, Mavis		Existing	\$ 147.00	\$ 0	N/A	Referral	\$ 999,999.99	Active	Rosario Orn	Stehr-Hermann Group
Armstrong, Wade		Existing	\$ 0	\$ 158.00	N/A		\$ 1,500.00	Active	Rosario Orn	Bauch Group and Sons
Aufderhar, Vicky		Existing	\$ 0	\$ 0	N/A		\$ 999,999.00	Active	Rosario Orn	Hill, Wiza and Dooley Group
Balistreri, Oswaldo	2384	Existing	\$ 0	\$ 128.00	N/A		\$ 2,000.00	Active	Rosario Orn	Labadie, Cassin and Lebsack and Sons
Baumbach, Carlee		Existing	\$ 0	\$ 0	Jan 27, 2021		\$ 0	Active	Dell Macejkovic	
Beatty, Dawn		New	\$ 0	\$ 1,206.00	N/A		\$ 2,000.00	Active	Rosario Orn	Schmitt and Sons Group
Beer, Jodie		Existing	\$ 0	\$ 113.00	N/A		\$ 2,000.00	Active	Rosario Orn	Bernhard-Quigley LLC
Bergnaum, Rodrick		Existing	\$ 0	\$ 0	N/A		\$ 2,000.00	Active	Rosario Orn	Braun, Damore and Sauer LLC
Bernier, Freda		Existing	\$ 0	\$ 0	N/A	Referral	\$ 1,500.00	Active	Rosario Orn	Jenkins-Howell Inc
Blick, Brian		Existing	\$ 0	\$ 1.50	Jul 26, 2021		\$ 999,998.49	Active	Rosario Orn	Muller and Sons LLC
Boehm, Trevion		Existing	\$ 0	\$ 0	N/A		\$ 1,000.00	Active	Rosario Orn	Hammes and Sons and Sons
Bogan, Autumn		Existing	\$ 0	\$ 128.00	Jul 23, 2021		\$ 3,872.00	Active	Rosario Orn	Bernhard-Quigley LLC
Bosco, Kenneth		Existing	\$ 0	\$ 0	N/A		\$ 1,500.00	Active	Rosario Orn	Mitchell Inc Group
Boyer, Arely		New	\$ 154.00	\$ 235.00	N/A		\$ 1,000.00	Active	Rosario Orn	Pacocha, Leffler and Hammes Inc
Bradtko, Estell		Existing	\$ 0	\$ 194.00	N/A		\$ 999,999.99	Active	Rosario Orn	Kub, Kris and Volkman LLC
Braun, Filiberto		New	\$ 0	\$ 718.00	N/A	Referral	\$ 999,999.99	Active	Rosario Orn	Kub, Kris and Volkman LLC
Buckridge, Jeromy		New	\$ 176.00	\$ 2,426.00	N/A		\$ 1,500.00	Active	Rosario Orn	Pacocha, Leffler and Hammes Inc

Upon clicking on the month, you will be able to view patients with pending treatment including the chart #, type, Pend. TX \$ SCH, Pend. TX \$ USC, Next Visit Date, Referred to, rRem. Benefits, Status, Provider id, Pref. Prov., and Insurance.

Clicking the breakout button next to the patient name will pop up the patient information modal.

# Waterfall

The **Waterfall Module** compares your Production with your Collections over a 13 month timeframe in order to provide a view of trailing collections and monitor variances month to month.

- You can select what daterange you want to display by using the Datepicker.
- You have the ability to download data by clicking on the download button.
- You can use the horizontal scrollbar to scroll the table and see more data
- You can use the breakout buttons on the bottom of the Table to view more information regarding collections that don't quite fit into the Table categories.

Waterfall

January 2021

Apple

Refresh

Download

MONTH	NET PERIOD	2019-01	2019-02	2019-03	2019-04	2019-05	2019-06	2019-07	2019-08	2019-09	2019-10	2019-11	2019-12	TOTAL PAYMENTS	% PAYMENT OF NET PROD
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Waterfall

August 2021

Apple

Refresh

Download

MONTH	NET PROD	2019-08	2019-09	2019-10	2019-11	2019-12	2020-01	2020-02	TOTAL PAYMENTS	% PAYMENT OF NET PROD
2019-08	\$96,402	\$44,321	\$17,910	\$11,943	\$3,650	\$2,114	\$889	\$203	1 \$87,651	91%
2019-09	\$67,561		\$33,937	\$16,647	\$4,935	\$2,374	\$1,972	\$725	1 \$65,349	97%
2019-10	\$114,747			\$68,042	\$15,958	\$8,861	\$3,004	\$2,309	1 \$107,128	93%
2019-11	\$65,917				\$35,330	\$18,521	\$4,659	\$1,711	1 \$62,849	95%
2019-12	\$78,224					\$35,782	\$21,815	\$6,696	1 \$73,282	94%
2020-01	\$88,405						\$38,203	\$25,423	1 \$79,195	90%
2020-02	\$76,310							\$38,043	1 \$73,700	97%
2020-03	\$117,312								1 \$101,245	86%
2020-04	\$86,109								\$87,310	101%
2020-05	\$94,158								\$81,394	86%
2020-06	\$78,321								\$65,236	83%
2020-07	\$97,400								\$96,848	99%
2020-08	\$86,131								\$72,400	84%
2020-09	\$80,806								\$72,527	90%
2020-10	\$77,413								\$71,110	92%
2020-11	\$107,608								\$91,468	85%
2020-12	\$99,849								\$88,727	89%
2021-01	\$125,384								\$105,853	84%
2021-02	\$109,368								\$84,673	77%
2021-03	\$138,218								\$105,850	77%
2021-04	\$137,180								\$98,809	72%
2021-05	\$99,362								\$98,730	99%
2021-06	\$111,542								\$98,061	88%
2021-07	\$125,280								\$96,939	77%
2021-08	\$103,797								\$54,346	52%
UNAPPLIED		\$4,559	\$3,960	\$1,127	\$2,495	\$7,867	\$6,649	\$6,253	1 \$128,434	
Pre-payment		\$1,375	\$3,749	\$2,156	\$2,272	\$4,069	\$2,357	\$1,445	1 \$41,326	
Payment Outside Range		\$41,151	\$16,387	\$7,858	\$5,275	\$5,388	\$2,854	\$3,205	1 \$95,125	
TOTAL	\$2,463,304	\$91,404	\$75,043	\$111,773	\$64,914	\$84,915	\$82,400	\$81,012	1 \$2,385,553	97%

NOTE: This module is not available for *Dentrix Core*

# Q&A

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

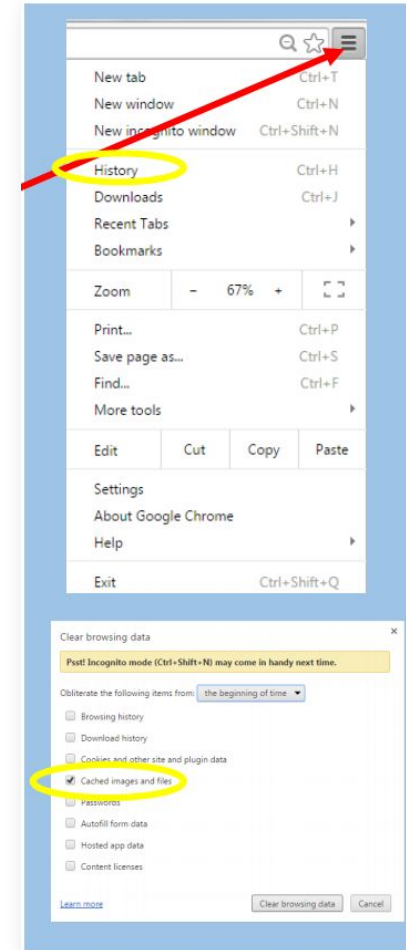
- Before you contact support, try clearing your cache. Go to your Google settings and click on History. Click clear browsing history. Then uncheck all of the boxes except for Cached images and file. Click Clear browsing data.

## 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.



# Q&A

## 4. How does Jarvis Classify it's Codes?

- 'D0120'-'D0999' : 'Diagnostic',
- 'D1110'-'D1550' : 'Preventive',
- 'D2110'-'D2999' : 'Restorative',
- 'D3110'-'D3999' : 'Endodontics',
- 'D1410'-'D4999' : 'Periodontics',
- 'D5110'-'D5899' : 'Prosth, remov',
- 'D5911'-'D5999' : 'Maxillo Prosth',
- 'D6010'-'D6199' : 'Implant Serv',
- 'D6210'-'D6999' : 'Prosth, fixed',
- 'D7110'-'D7999' : 'Oral Surgery',
- 'D8010'-'D8999' : 'Orthodontics',
- 'D9110'-'D9999' : 'Adjunct Serv',
- '15000'-'15115' : 'Conditions',
- '20999'-'209999' : 'Other'

# Disclaimer

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# Thank you



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