JARVIS
ANALYTICS

Jarvis Dashboard
User Guide

Last Updated: September 2021
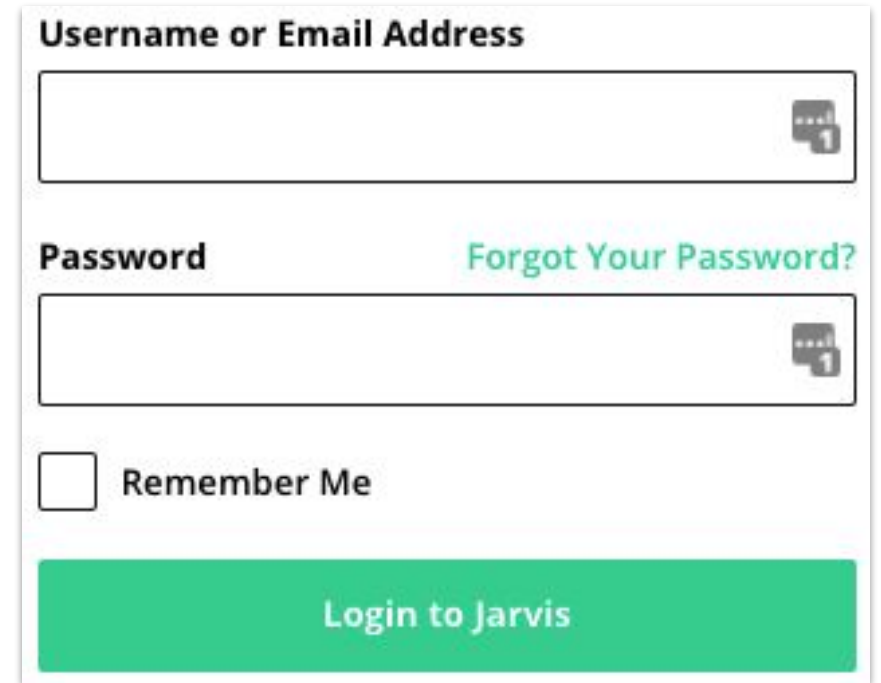
Table of Contents

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**, or call **866-9-JARVIS** (866-952-7847).
     We will create your account and send you your credentials.

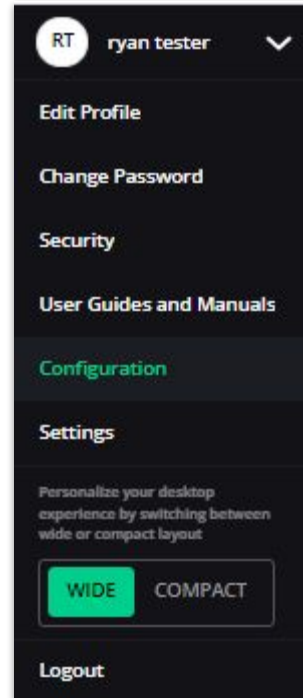   - If you forgot your password, click "***Forgot your password***?" and a new password will be sent to your email.

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.

Username or Email Address

Password   Forgot Your Password?

☐ Remember Me

Login to Jarvis

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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.
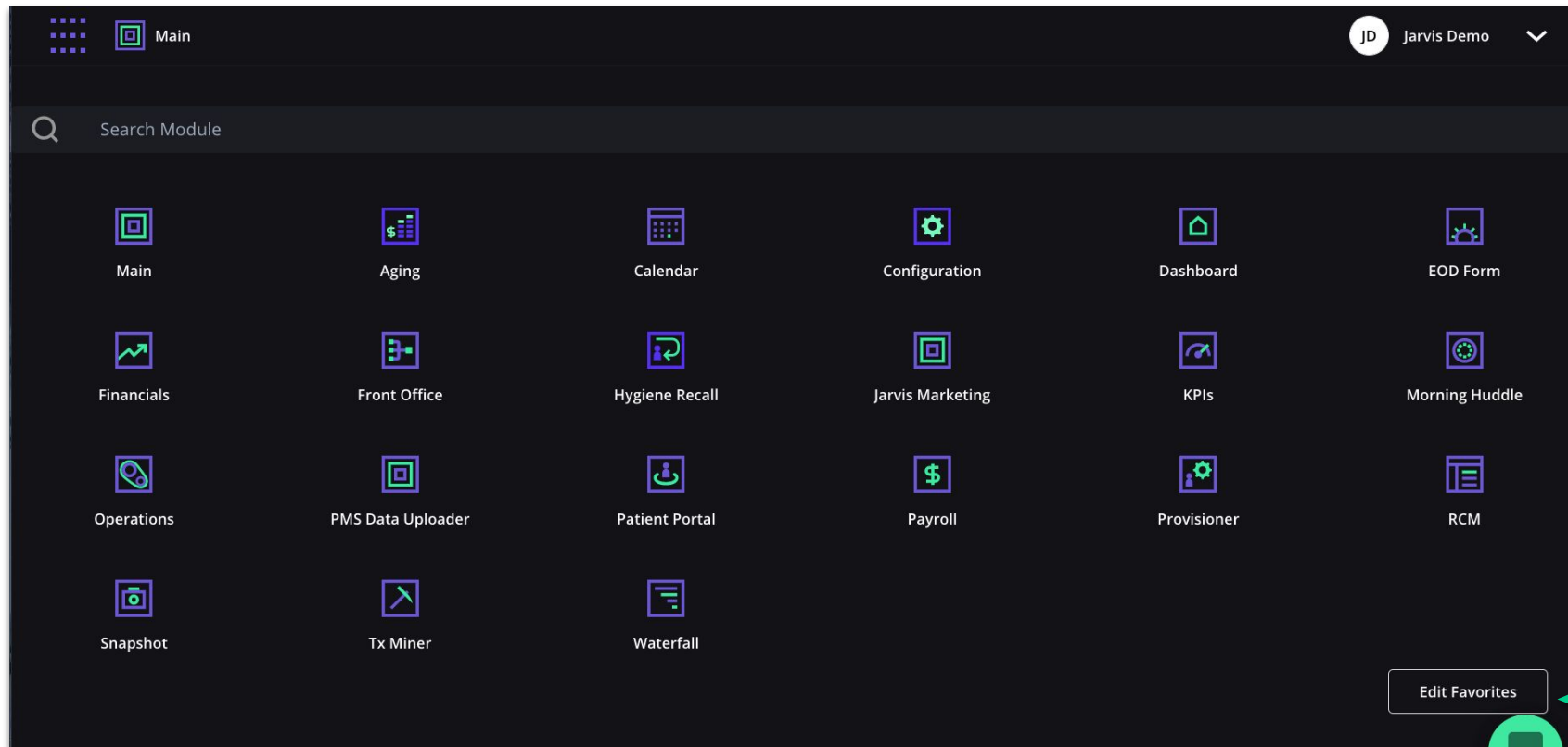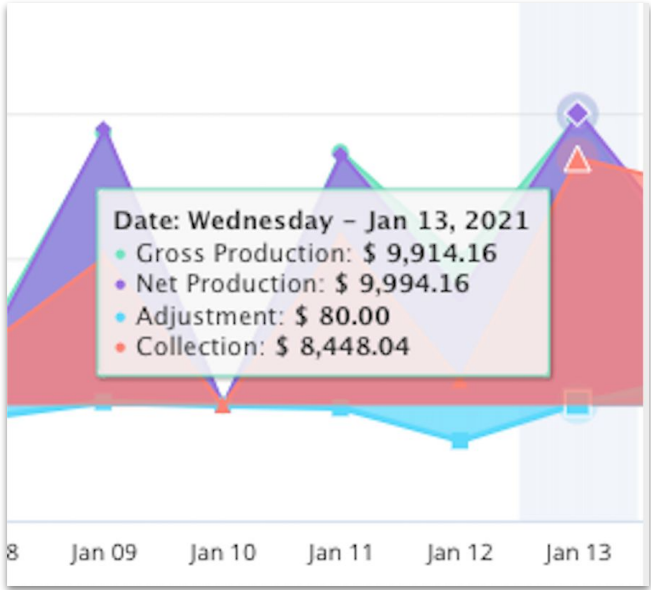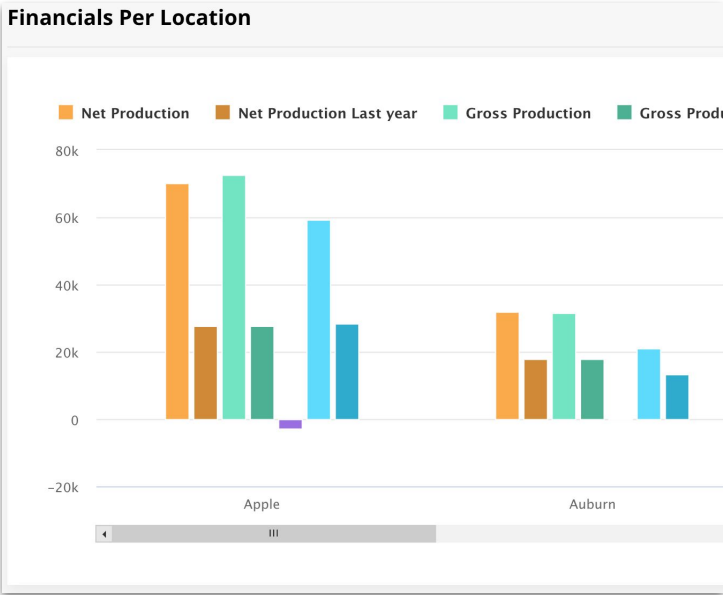
Navigation

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
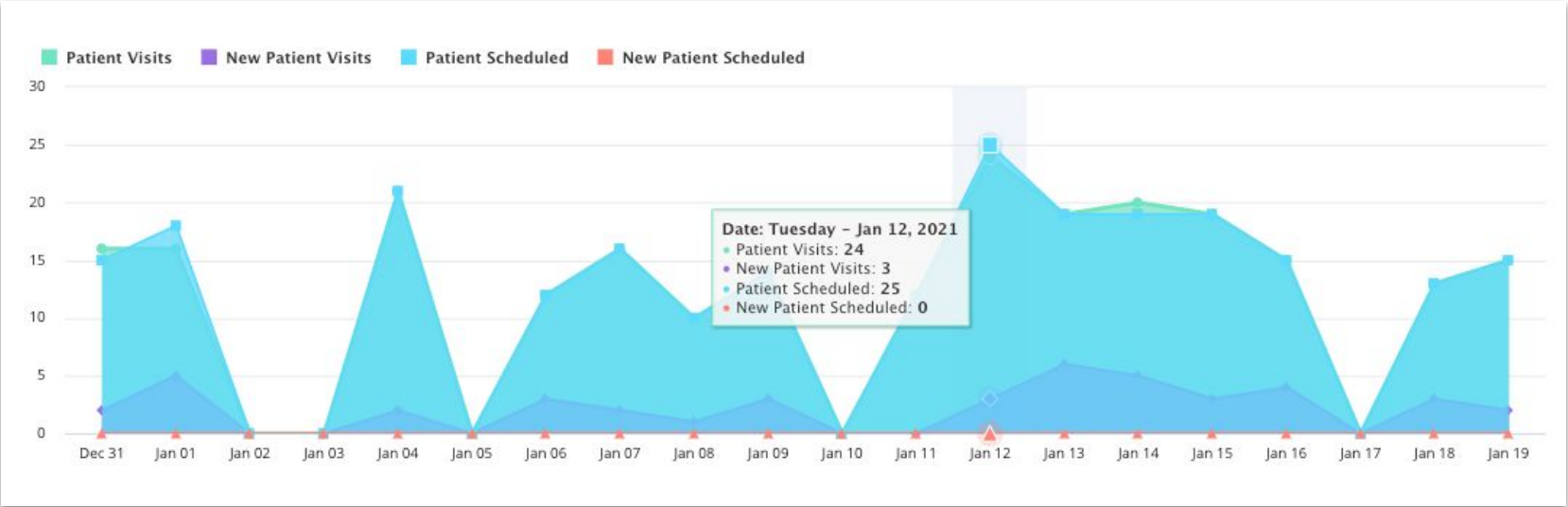
Graphs

Financials Per Location

Legend: Net Production | Net Production Last year | Gross Production | Gross Prod...

(Bar chart showing values for Apple and Auburn locations, y-axis from -20k to 80k)

Hover over graphs to see detailed information.

Date: Wednesday – Jan 13, 2021
- Gross Production: $ 9,914.16
- Net Production: $ 9,994.16
- Adjustment: $ 80.00
- Collection: $ 8,448.04

(Area chart with dates Jan 09, Jan 10, Jan 11, Jan 12, Jan 13)

Production
Actual	$ 152,852.60
Goal	$ 253,529.00

Collection
Actual	$ 158,367.95
Goal	$ 241,456.00

Patient Visits
Actual	465
Goal	0

New Patient Visits
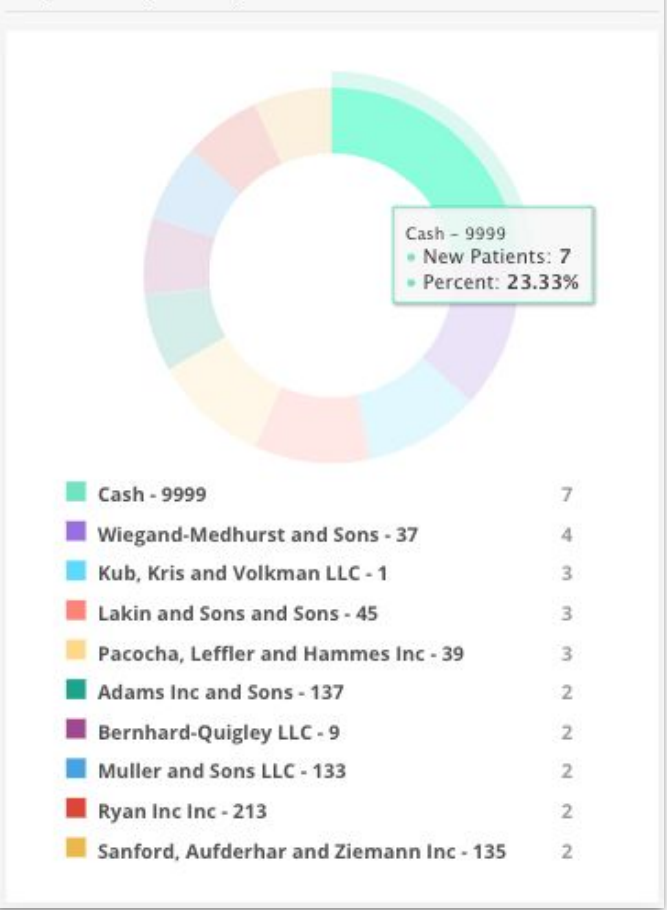|	
Actual	46
Goal	180

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Graphs

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

Date Picker

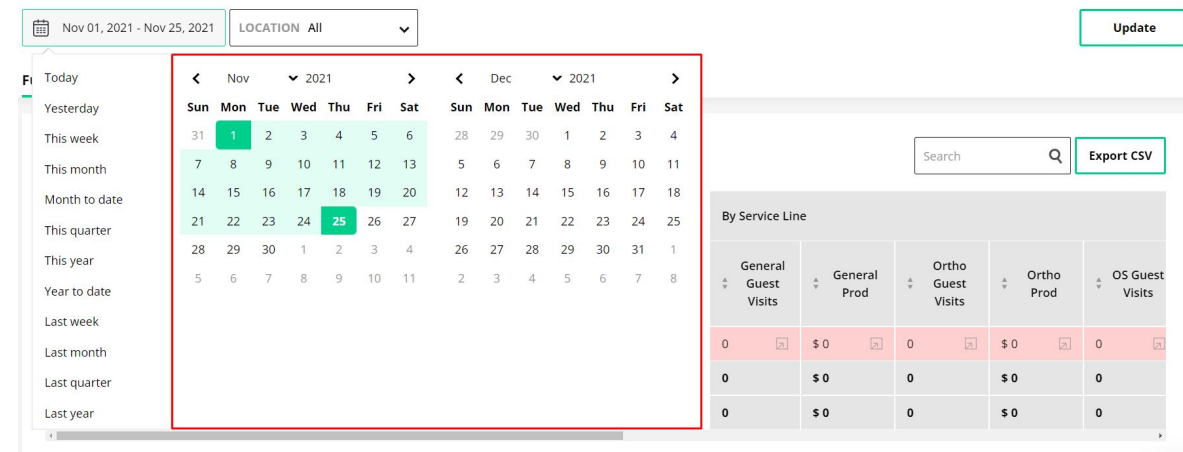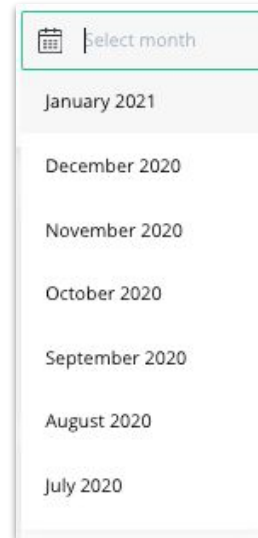You are able to filter data displayed in your dashboard by date. Follow these steps to sort your data by date:

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

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

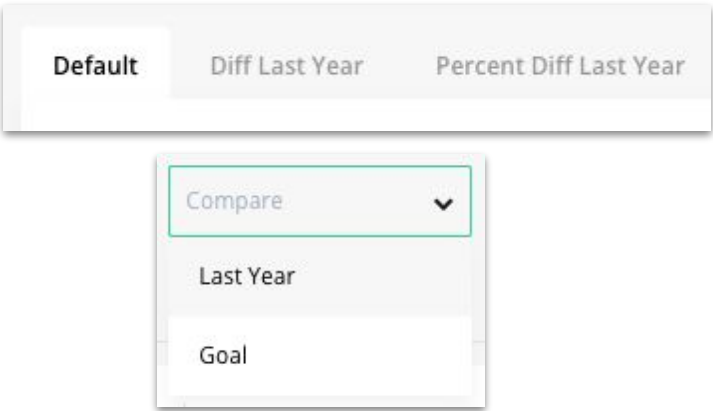See different views in modules by selecting by the various tabs located at the top of the module.

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:

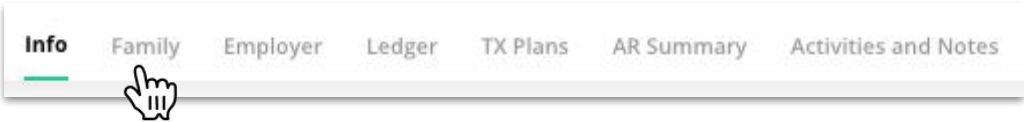- Diff Last Year
- % Diff Last Yr.
- Diff vs. Goals

| Default | Diff Last Year | Percent Diff Last Year |

Compare ⌄

Last Year

Goal

Export CSV

Search 🔍

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

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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.

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.

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**"

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

Unlock Your True Practice's Potential™

Know your numbers + Maximize Performance + Increase your ROI ↗

Your Practice Potential

On the bottom of the page, we have Announcements, User guide and support links, and Quick Links

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
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 →

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Aging

- 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

- 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.

- 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

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Aging (Historical Aging & Credits Filter)

- 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 chose 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	Cont
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.

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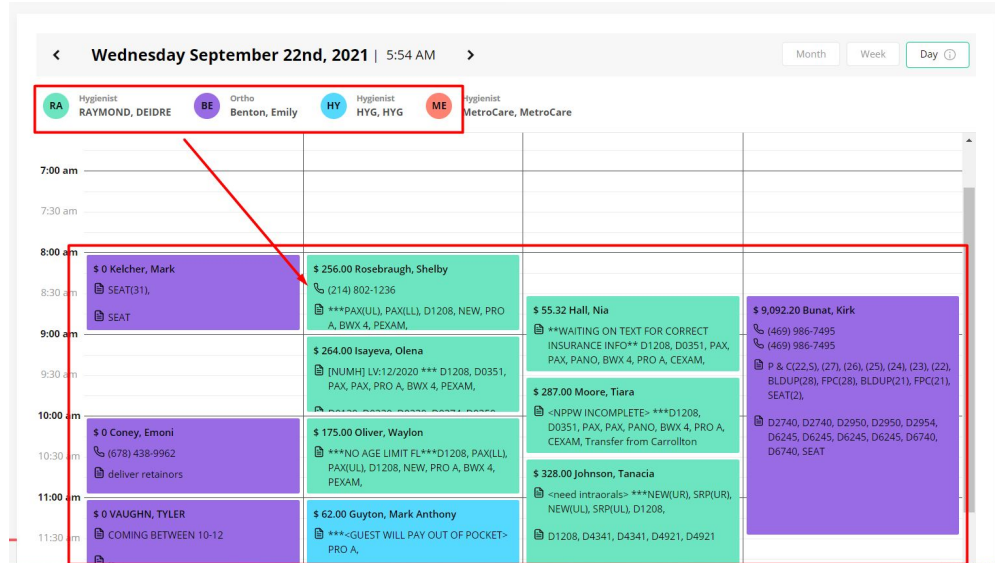
Calendar

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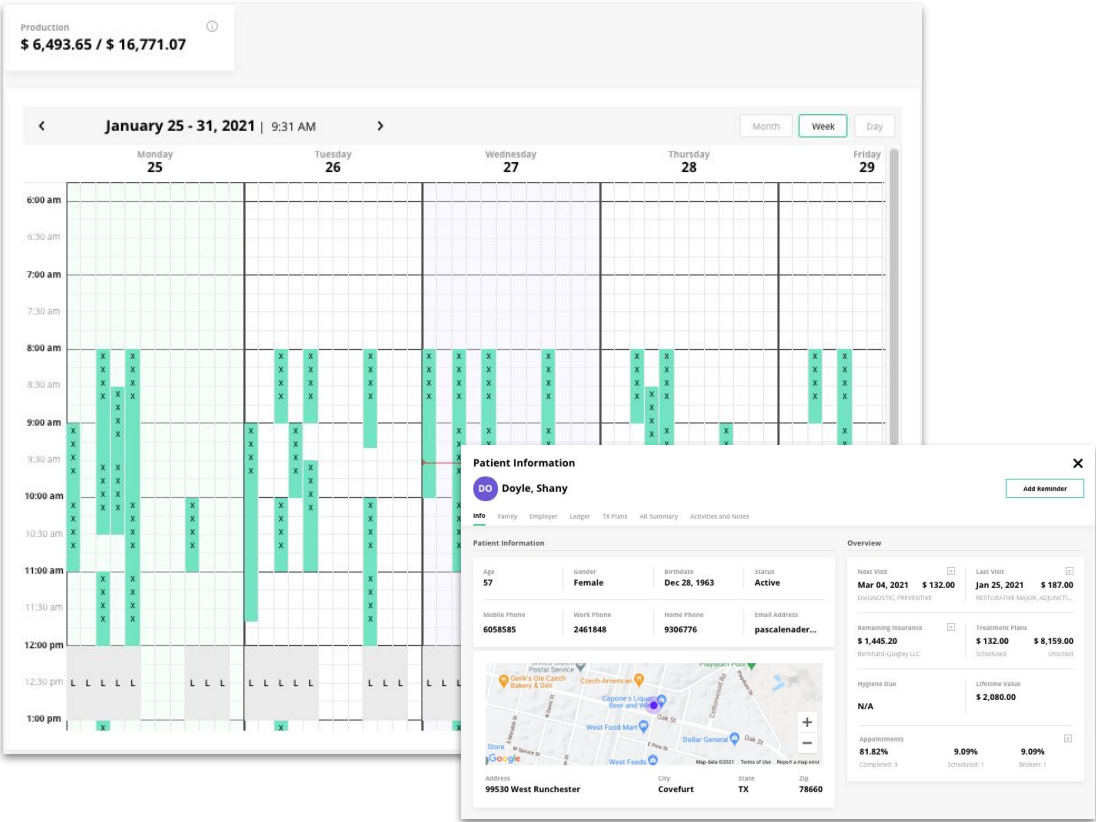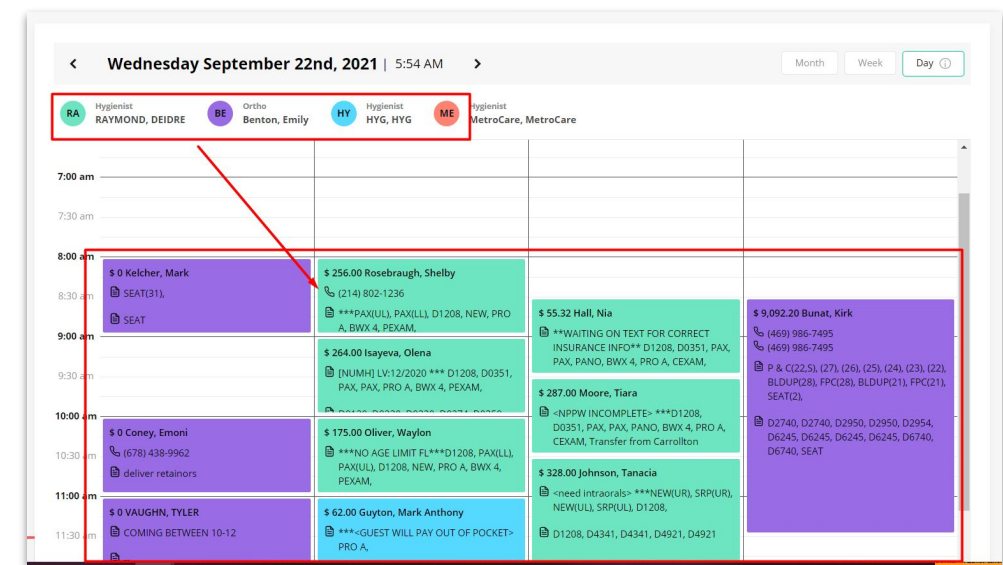
The calendar displays your reservations for the selected week. Click on each event/ appointment to provide a patient information modal

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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.

Calendar (appointment details)

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
- Operatory 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

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.

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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.

Configurations (Basic Settings)

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

Configurations (Users)

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

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.

Configurations (Users)

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

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.

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Configurations (Users)

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

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**.

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.

Configurations (Locations)

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

Configurations (Locations)

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

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.

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**".

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.

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.

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.

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.

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.

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.

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.

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

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.

Location: Apple
Status: All
Visibility: All
Search

Clear Settings | Apply Default Settings | Export CSV

Enable	Provider	Location	Provider ID	Last Active	3yr Production	General	Hygiene	Oral Surgery	Clear Aligners	Perio	Pedo	Endo
✔	Bartell, Dovie	Apple	GM	2022-01-24	$80,785	✔						
✔	Berge, Octavia	Apple	TH	2021-10-24	$28	✔						
✔	Block, Donny	Apple	SP		$0	✔						
✔	Boehm, Gisselle	Apple	OSP		$0	✔						
✔	Cassin, Cortez	Apple	OO	2022-04-17	$210,681	✔						
✔	Cassin, Vicenta	Apple	AAD	2021-11-10	$716	✔						

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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.

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.

Goals   Specialty

| Location | Month | Goal 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.

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

(i) **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 | Month | Goal Type |
| All Locations ⌄ | 📅 April 2022 | Monthly ⌄ |

📄 **Download CSV**   ⬆ **Upload CSV**

☐	ID	Office Name	Oral Surgery	Clear Aligners	Perio	Pedo	Endo	Ortho	Prosth...
☐	3	Apple ⚠	$ 10,000.00	$ 0.00	$ 5,000.00	$ 0.00	$ 3,000.00	$ 0.00	$ 0.00

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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.

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

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.

				Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu
⇅ Prov. ID	⇅ Provider Name	Office Name	⇅ Total Hrs.	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					

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

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.

Configurations (Code Mapping)

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

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

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.

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.

Configurations (Code Mapping)

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

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.

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

ⓘ **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
✓	Appointment Confirmation	melissa, david, skuehn, awalker	10	•••
✓	Unscheduled Broken Appointment	chester, maroulis, david, melissa, corey	10	•••
✓	Unscheduled Treatment		5	•••
✓	Hygiene Recare	melissa	5	•••
	Past Due Account	david, vicjarvis, melissa		•••
✓	Past Due Claims	maroulis, vicjarvis, mesasixAdmin	25	•••

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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.

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

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

Customize and control Google Chrome. Update is available.

...owser windows open, please use your browser's refresh functionality to ensure settings load properly after making any changes in the Configuration module.

| Basics | Provider List | Month-To-Date | Office Goals | Booked Production |

Filter	Enabled	Locked
Number of unscheduled treatment calls made today	✓	✓
Booked production	✓	✓
Case acceptance (%)	✓	✓
Daily collections	✓	⚪
Do all patients have recall reservation	✓	
Endo	✓	✓

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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 ot 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.

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.

Yesterday   Today   Tomorrow

Filter	Enabled
Yesterday's Production (gross)	✓
Goal	✓
Yesterday's Production (net)	✓
Yesterday's Collection	✓
Patient Co-pay Collection (%)	✓
Production Per Patient	✓

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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 ot 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.

ⓘ **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.

| Setup | Definition |

Basic ▼   Save

Filter	Enabled
Actual + Scheduled Production	✅
Booked less Net Prod	⬜
Booked less Goal	⬜
Adjustments	✅
General Production	⬜
Gross Production	✅
Insurance Collections	✅
Invisalign Production	⬜

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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

Dashboard

| 📅 May 01, 2021 - May 24, 2021 | LOCATION All ⌄ | LINE OF BUSINESS All ⌄ | VIEW BY Location ⌄ | | Refresh |

Revenue   Previous Year ⌄

Gross Production
$ 741,549.07 ↗
$ 205,076.01 up vs previous year

Net Production
$ 707,867.23 ↗
$ 197,836.82 up vs previous year

Total Adjustment
$ (33,681.84) ↙
$ (7,239.19) down vs previous year

Total Collection
$ 754,826.79 ↗
$ 305,867.78 up vs previous year

Total New Patients
613 ↗
111 up vs previous year

Total Existing Patients
2,598 ↗
960 up vs previous year

Total Gross Production	**Total Net Production**	**Total Adjustments**	**Total Collection**	**Total New Patients**	**Total Existing Patients**
The total gross production for all locations you have access to.	The total net production for all locations you have access to.	The total adjustments for all locations you have access to.	The total collection for all locations you have access to.	The total new patients for all locations you have access to.	The total existing patients for all locations you have access to.

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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** 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.

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: [Search] Sort: [Select sort] Location: [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**

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Dashboard (provider modal card)

Provider Information

RO Robel, Aracely

Info   Production   Visits   TX Accepted

Provider Information

Age	Gender	Specialty	Email Address
N/A	Female	Doctor	N/A

Address	City	State	Zip
--	--	--	--

Overview

Production	Avg. Production / Day
$ 65,147.59	$ 3,619.31

Production / Patient Visit	Accepted TX Plan
$ 288.26	6.23%

Patient Visits	New Patient Visits
226	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

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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**

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

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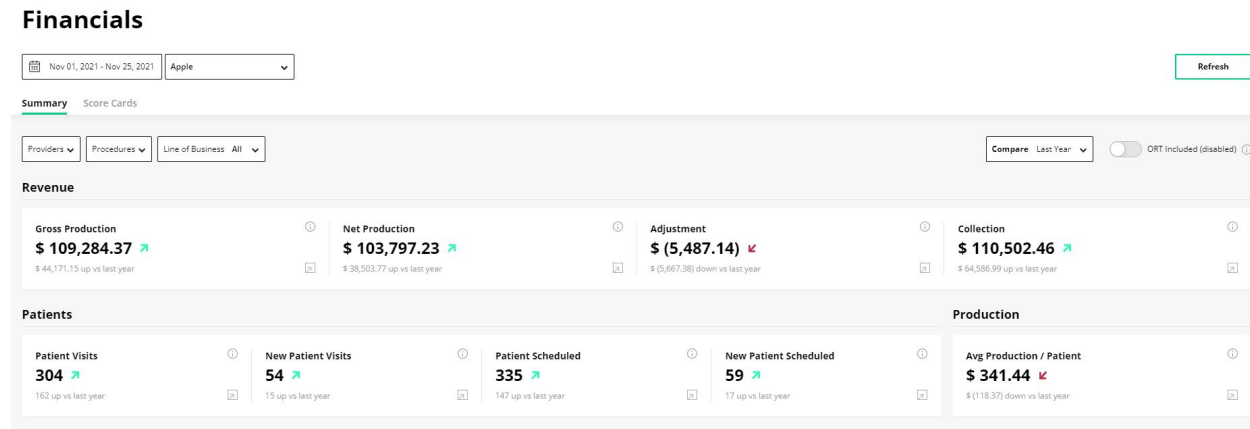
This module also has the same "Trend Arrows" that are seen in other modules. In this module, they allow users to see how they are trending compared to last year.

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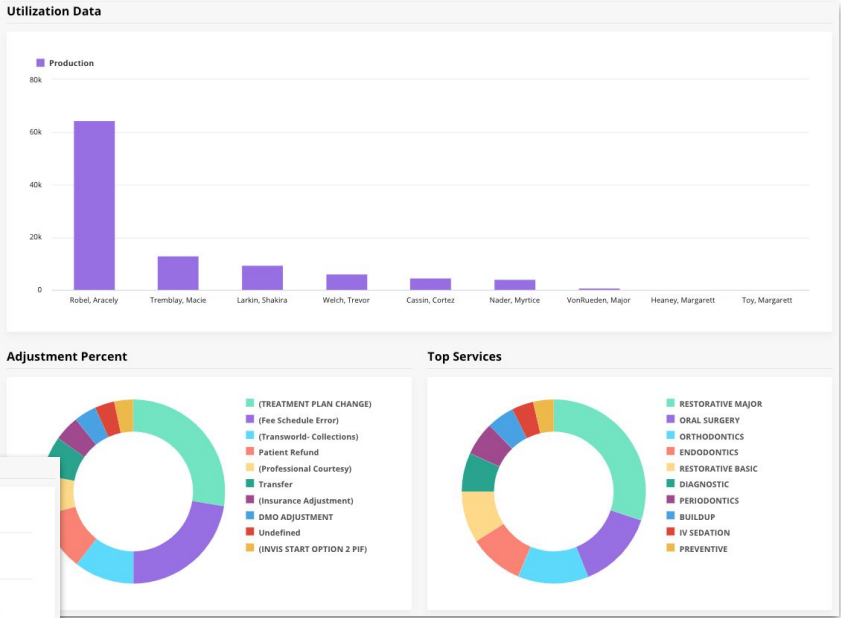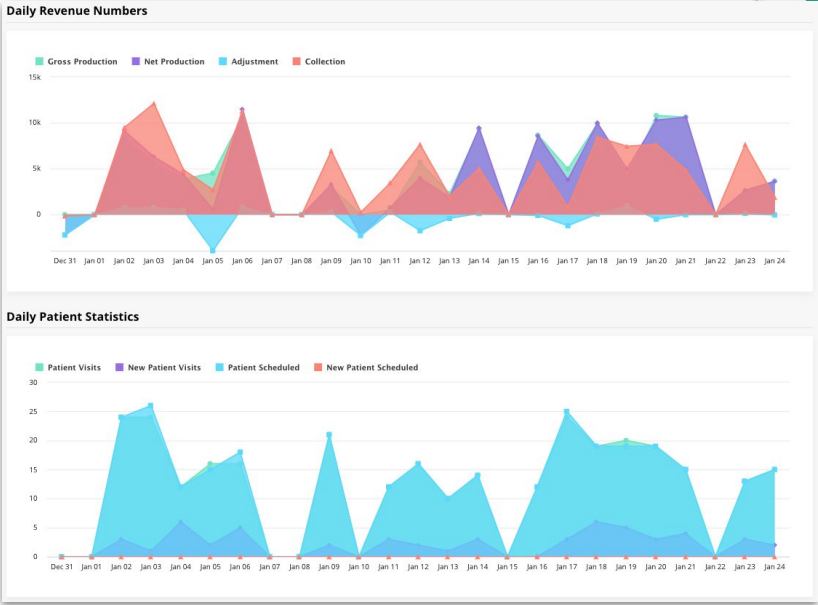
The **Daily Revenue Numbers** graph shows the daily financials data for: Adjustments, Collection, Production, and Gross production

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

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

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.

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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.

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.
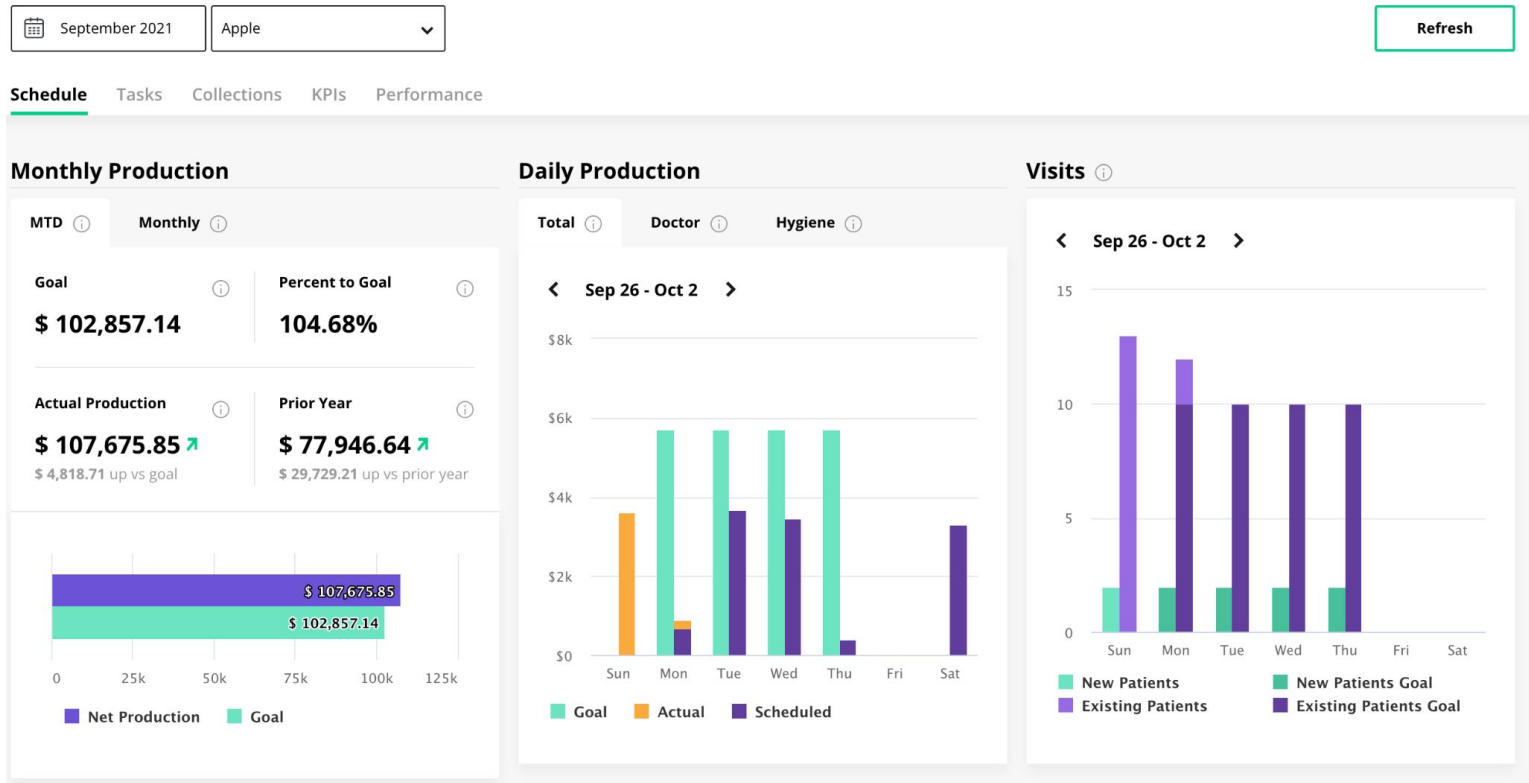
Front office (schedule)

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.
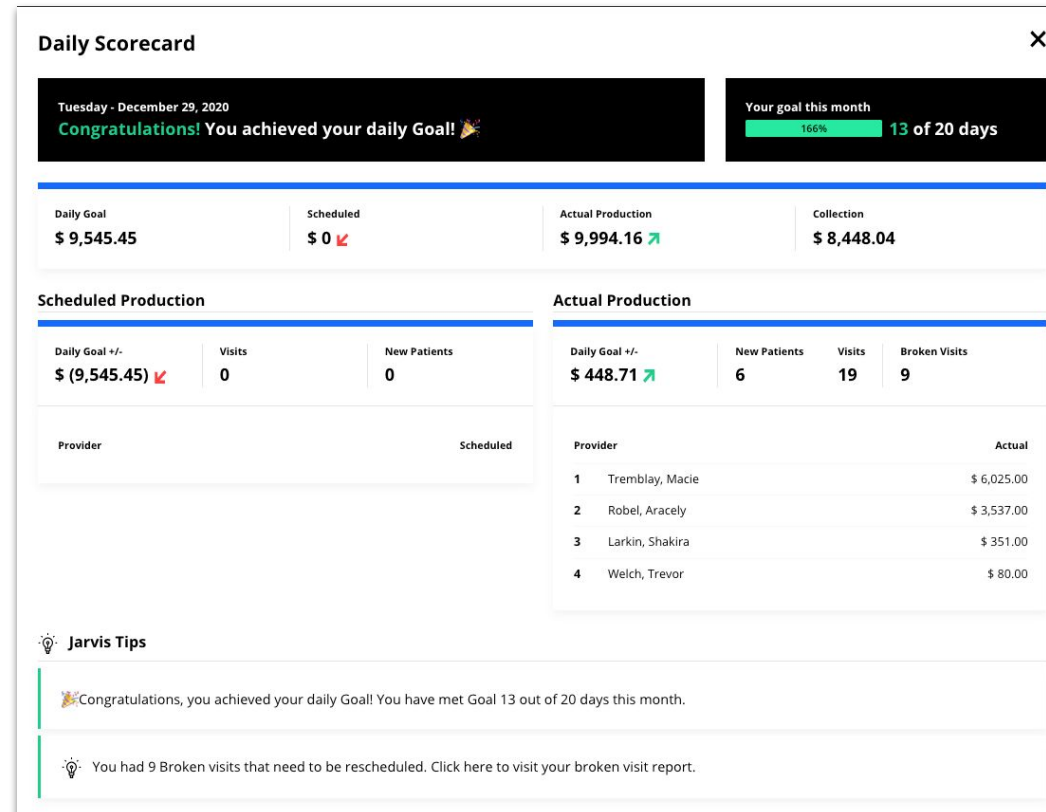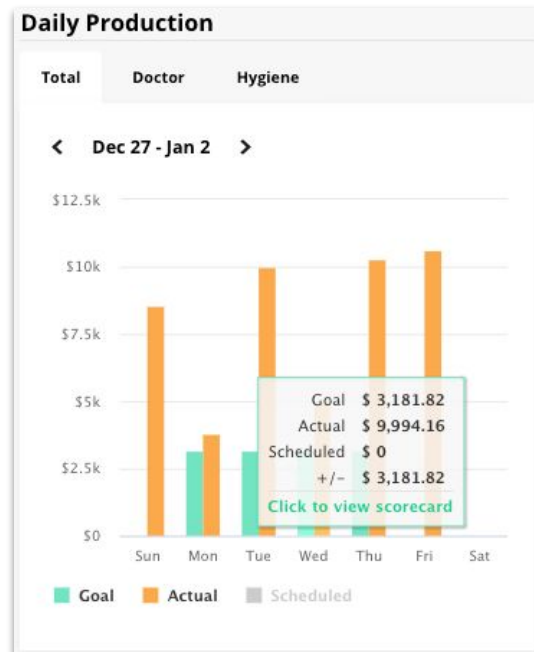
Front office (schedule)

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.

Schedule Opportunities

Broken Appointments

140

Patients with Cancellations or No Shows

101	39

■ Unscheduled ■ Scheduled

Hygiene Reappointment

13   **88.29%**

Patients with no future hyg appointment   Reappointment rate

13	98

■ Unscheduled ■ Scheduled

Hygiene Recall Due

■ 0-3 Months	235
■ 3-6 Months	95
■ 6-9 Months	144
■ 9-12 Months	102
■ 12+ Months	371

Hygiene Recall Results

4   **$ 350.00**

Rescheduled Patients   Rescheduled Production

Unscheduled Treatment

■ 0-3 Months	$ 1,166,253.84 (612)
■ 3-6 Months	$ 1,026,118.95 (452)
■ 6-9 Months	$ 732,219.22 (502)
■ 9-12 Months	$ 776,118.42 (416)
■ 12-24 Months	$ 3,154,139.15 (1,430)

Unscheduled TX Results

4   **$ 1,485.00**

Rescheduled Patients   Rescheduled Production

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Front office (schedule)

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.

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

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**

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

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Front office (tasks)

The tasks table shows how many tasks are generated for the predetermined date ranges.
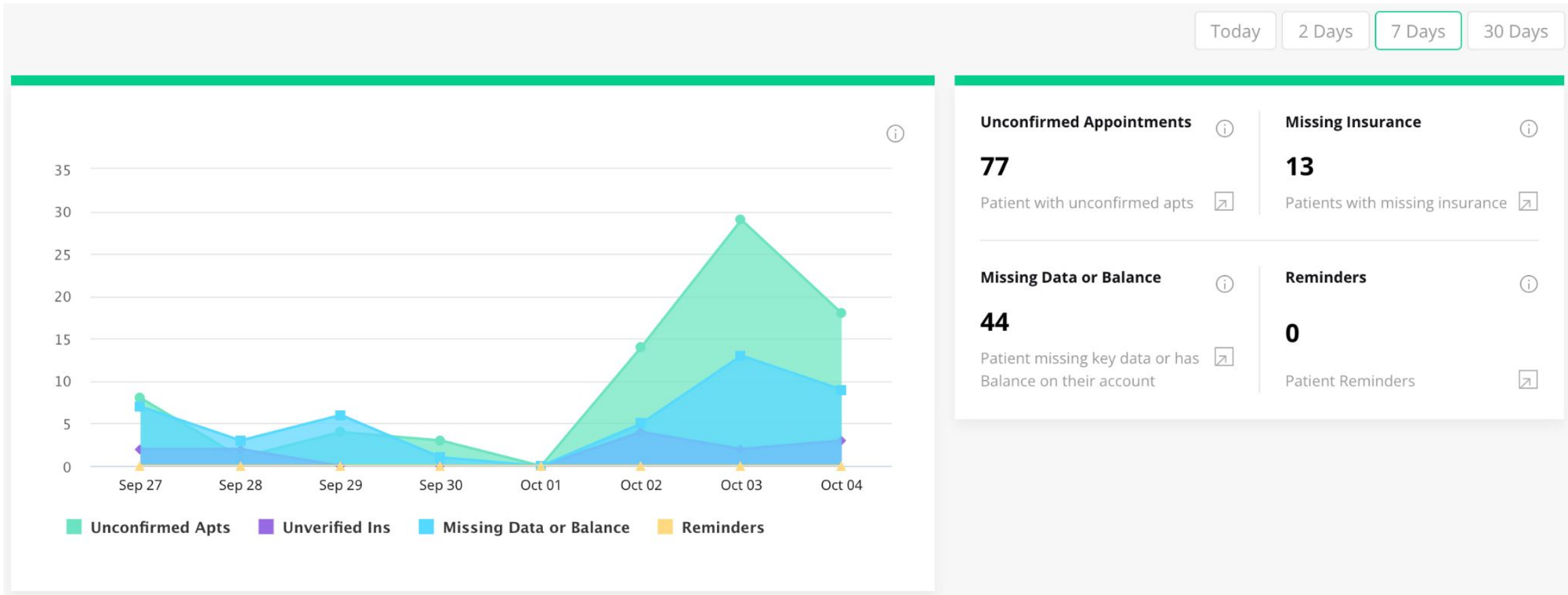
Front office (tasks)

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*.

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.
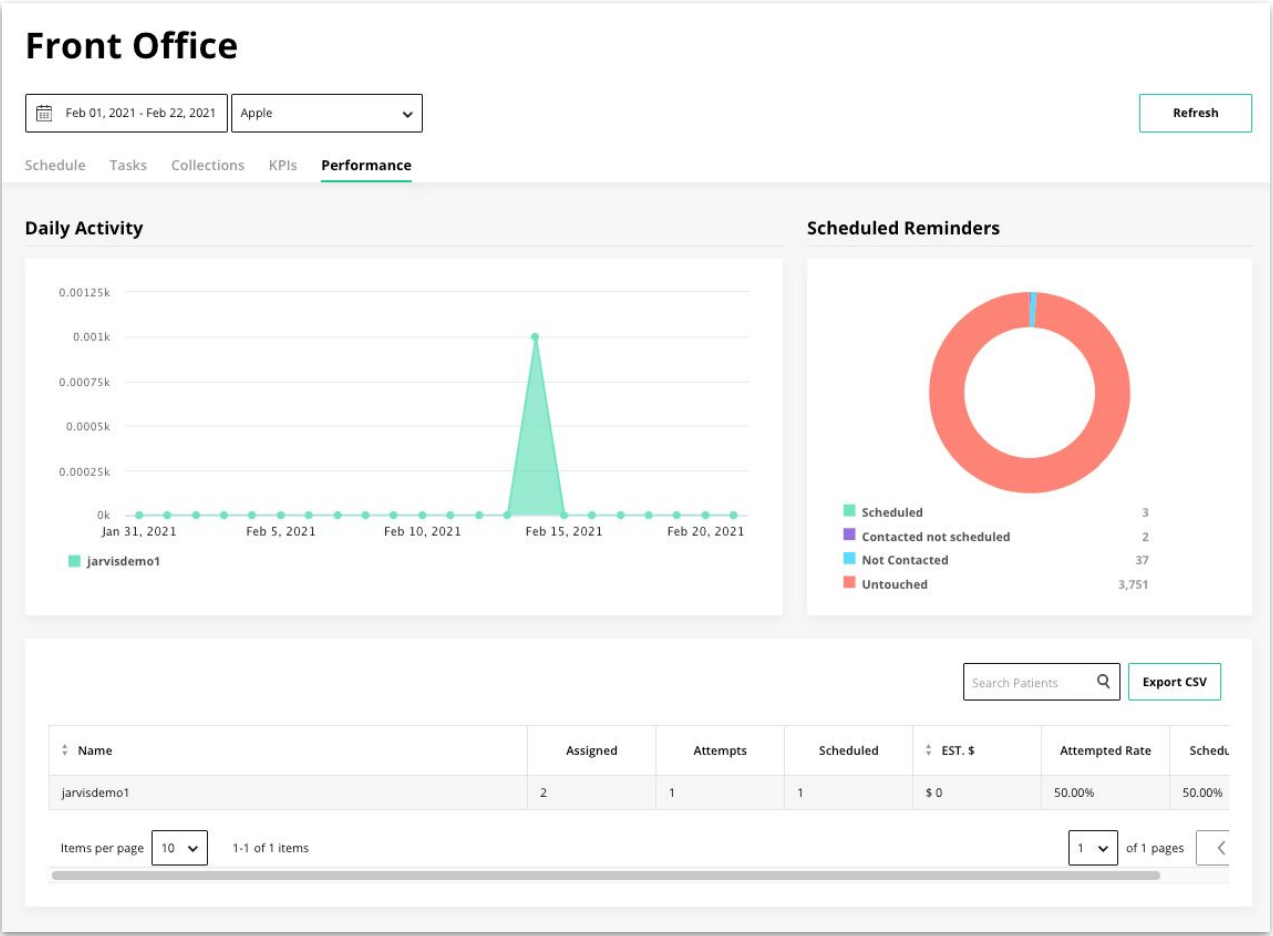
Front office (collections)

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

📅 September 2021   Apple ⌄   **Refresh**

Schedule   Tasks   **Collections**   KPIs   Performance

Patient Balances ⓘ

🟩 30 Days	$ 6,974.32
🟪 60 Days	$ 6,303.11
🟦 90 Days	$ 5,339.66
🟥 120 Days	$ 12,732.73
🟨 120+ Days	$ 210,397.98

Collections ⓘ

Collection Vs Goal (96.75%)

Collection	$ 116,104.83
Goal	$ 120,000.00

Co-Pay Collection Vs Goal (70.63%) ⓘ

Copay Collection	$ 52,397.28
Goal	$ 74,186.60

Adjustment Percent ⓘ

🟩 TREATMENT PLAN CHANGE	$ 4,160.00
🟪 Fee Schedule Error	$ 3,437.91
🟦 Transworld- Collections	$ 1,595.47
🟥 Patient Refund	$ 1,566.00
🟨 Professional Courtesy	$ 1,054.30

JARVIS ANALYTICS

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%

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

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ANALYTICS

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.**
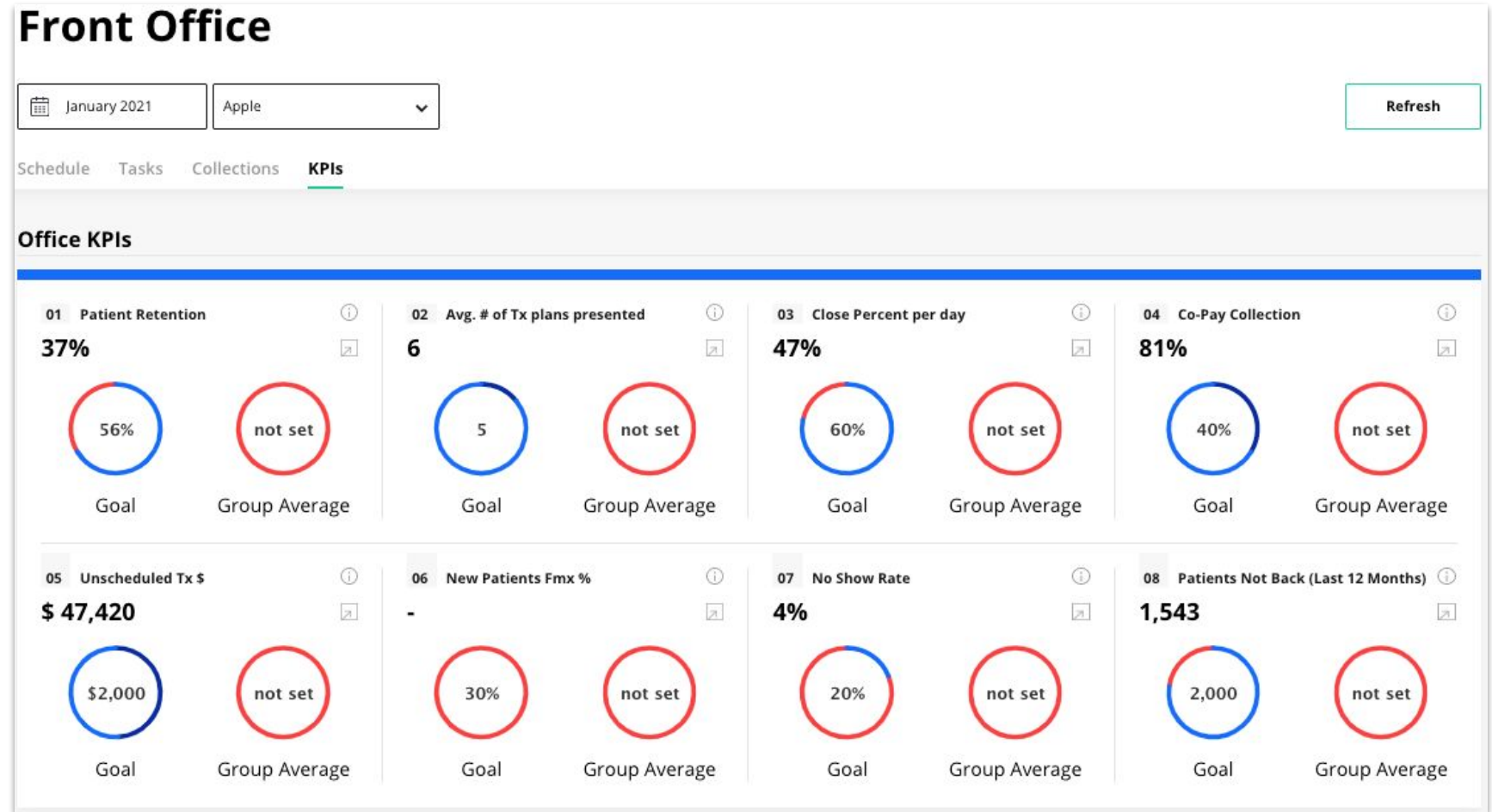
Front office KPI's

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
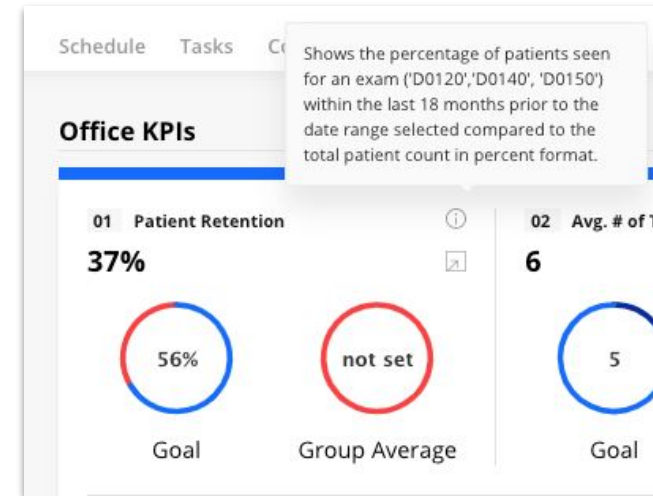
Hygiene Recall

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).

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.

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)

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)

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

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.

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**

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.

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

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

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 (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
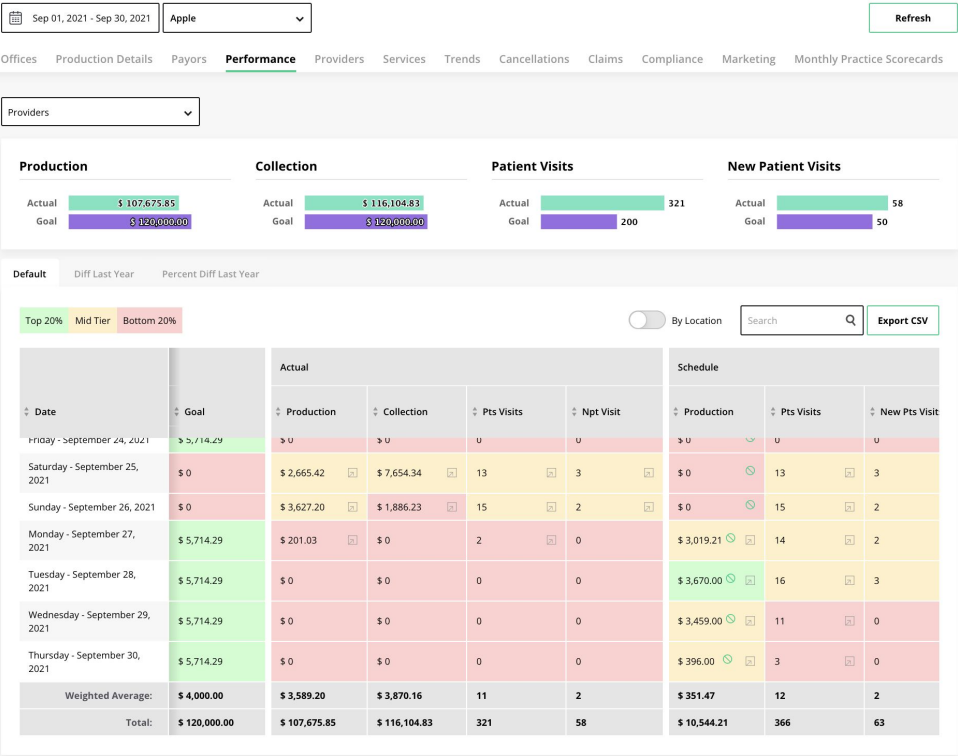
Operations (Providers)

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 (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

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 <u>trailing 12 months</u> 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**
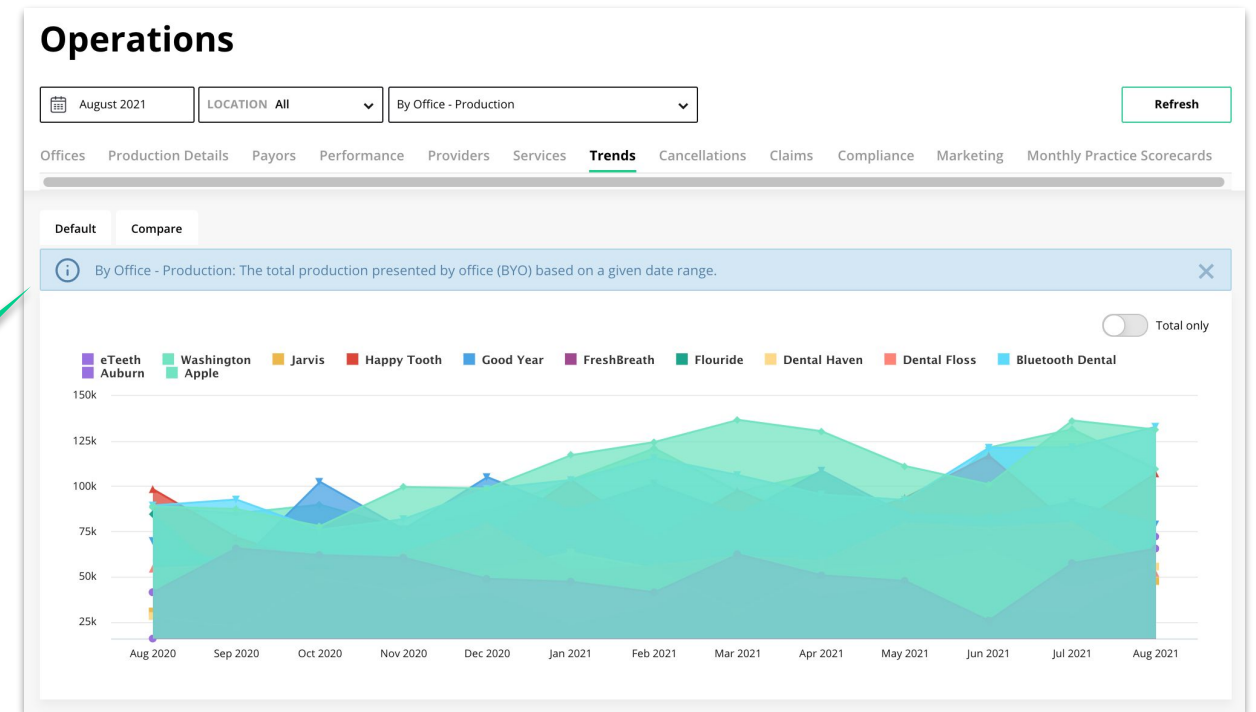
Operations (Cancellations)

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 %

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**

The **Compliance Report** shows production, patient visits and provider level data, ike 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.
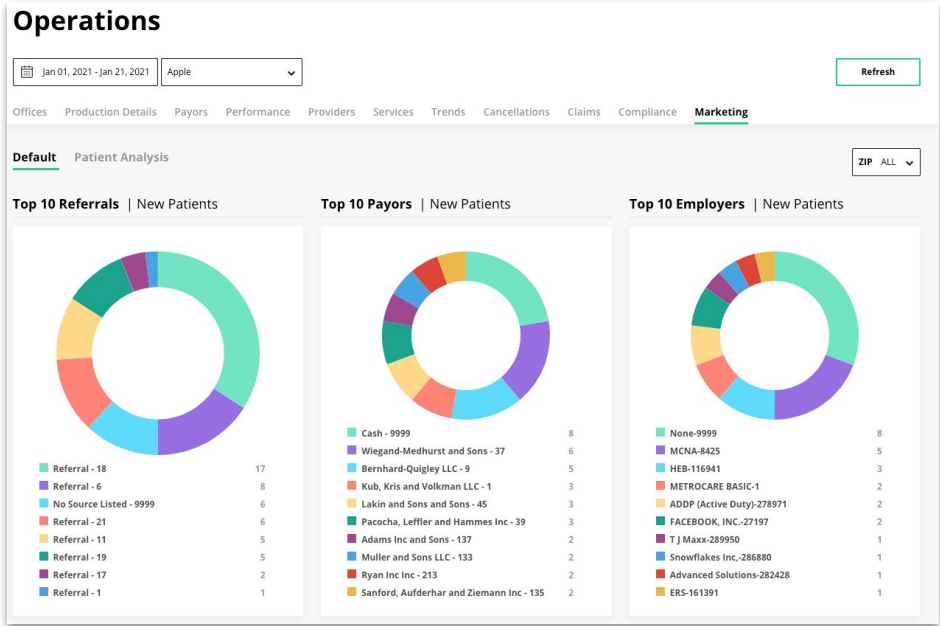
The charts display the top 10 referrals, payors, and employees for New patients within the date range.

Heatmap

Displays a map with varying temperatures that will help you determine where your new patients originate from.
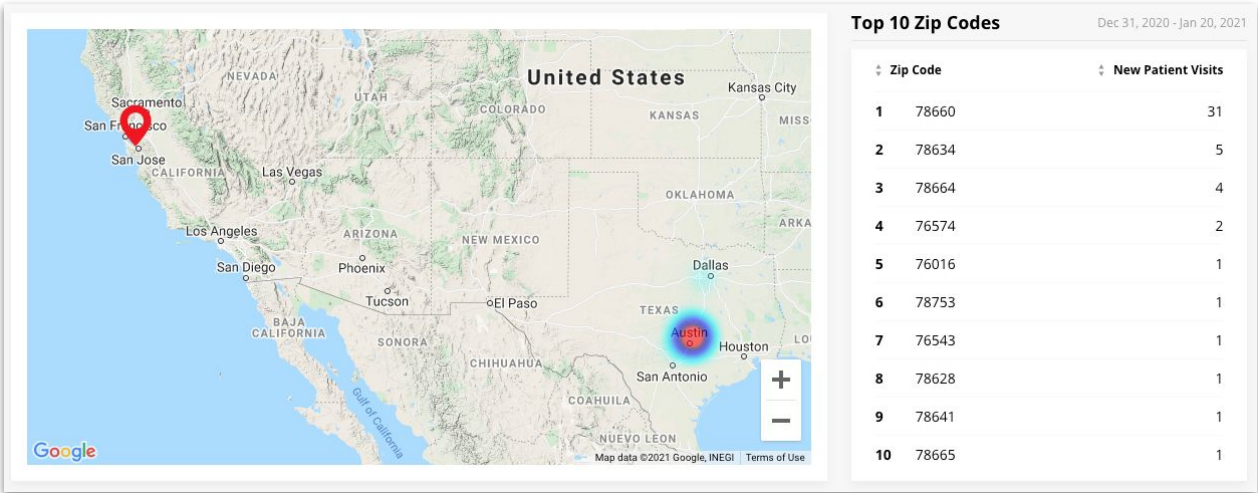
Top 10 Zip Codes

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%
Runolfsdottir 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 page 20 ▾   1-20 of 24 items   1 ▾ of 2 pages ‹ ›

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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.

Default   **Patient Analysis**

Patient Gender

Age Brackets

Ages	18 months		24 months	
	# of Active	% of TTL	# of Active	% of TTL
0-9	70	3.4%	80	3.3%
10-19	275	13.3%	314	13.0%
20-29	390	18.9%	473	19.5%
30-39	505	24.5%	609	25.1%
40-49	355	17.2%	399	16.5%
50-59	249	12.1%	300	12.4%
60-69	136	6.6%	152	6.3%
> 70	72	3.5%	80	3.3%
Unknown	13	0.6%	15	0.6%
Total	2,065	100.0%	2,422	100.0%

■ FEMALE
■ MALE

New Patient Seen vs Goal

Month to Date

Actual — 54
Goal — 41

Year to Date

Actual — 633
Goal — 383

New Patient Seen Volume

Daily   Weekly   Monthly

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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
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

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ANALYTICS

Patient Portal

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

3. Congratulations, you have created a filter!

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.

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

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

Patient Portal

Jan 17, 2021 - Jan 20, 2021	Apple ▼

Refresh

Patients   Reminders   **Performance**

Daily Activity

0.006k
0.004k
0.002k
0k
Jan 16, 2021

■ Jarvis Analytics   ■ Sarah   ■ demo1

Scheduled Reminders

■ Scheduled	3
■ Contacted not scheduled	2
■ Not Contacted	36
■ Untouched	3,745

Search Patients   Export CSV

Name	Assigned	Attempts	Scheduled	EST. $	Attempted Rate	Schedul
Jarvis Analytics	1081	2	0	$ 0	0.19%	-
Sarah	59	1	1	$ 0	1.69%	1.69%

Items per page 10 ▼   1-2 of 2 items   1 ▼ of 1 pages ‹

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ANALYTICS

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

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

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ANALYTICS

RCM - Revenue Cycle Management

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

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

RCM - Revenue Cycle Management

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

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

RCM

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

RCM

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

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
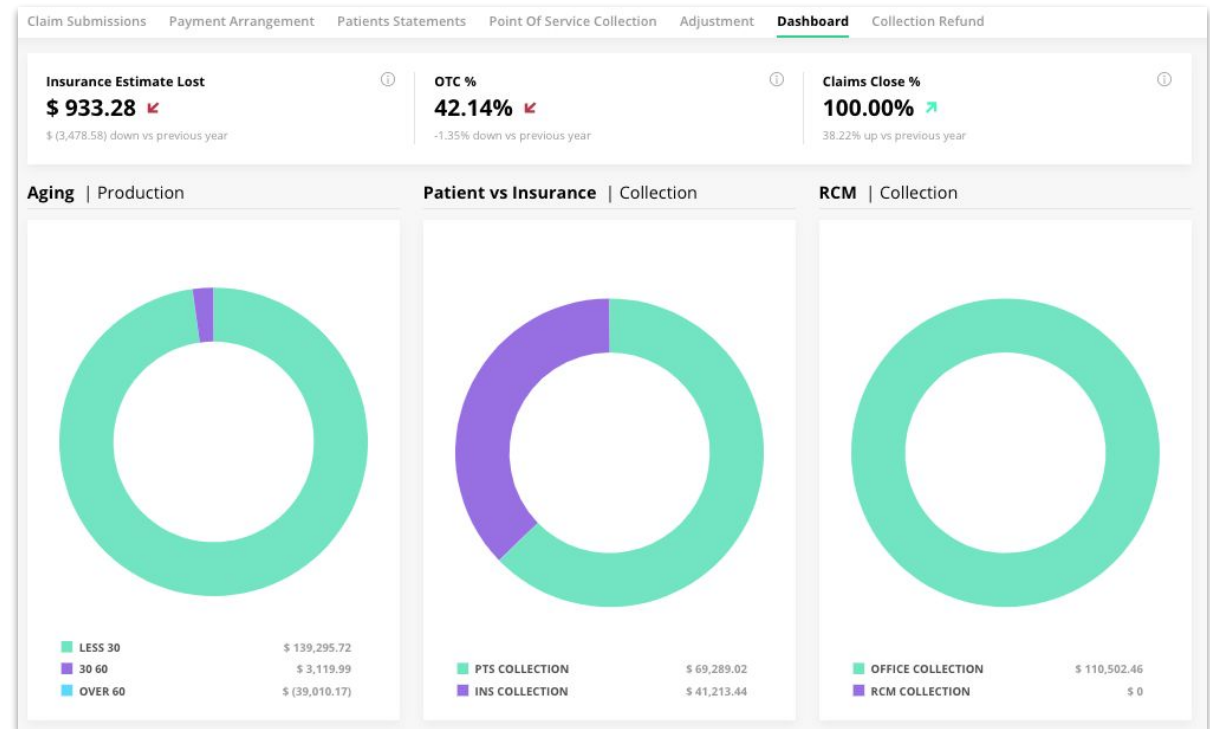
RCM - Revenue Cycle Management

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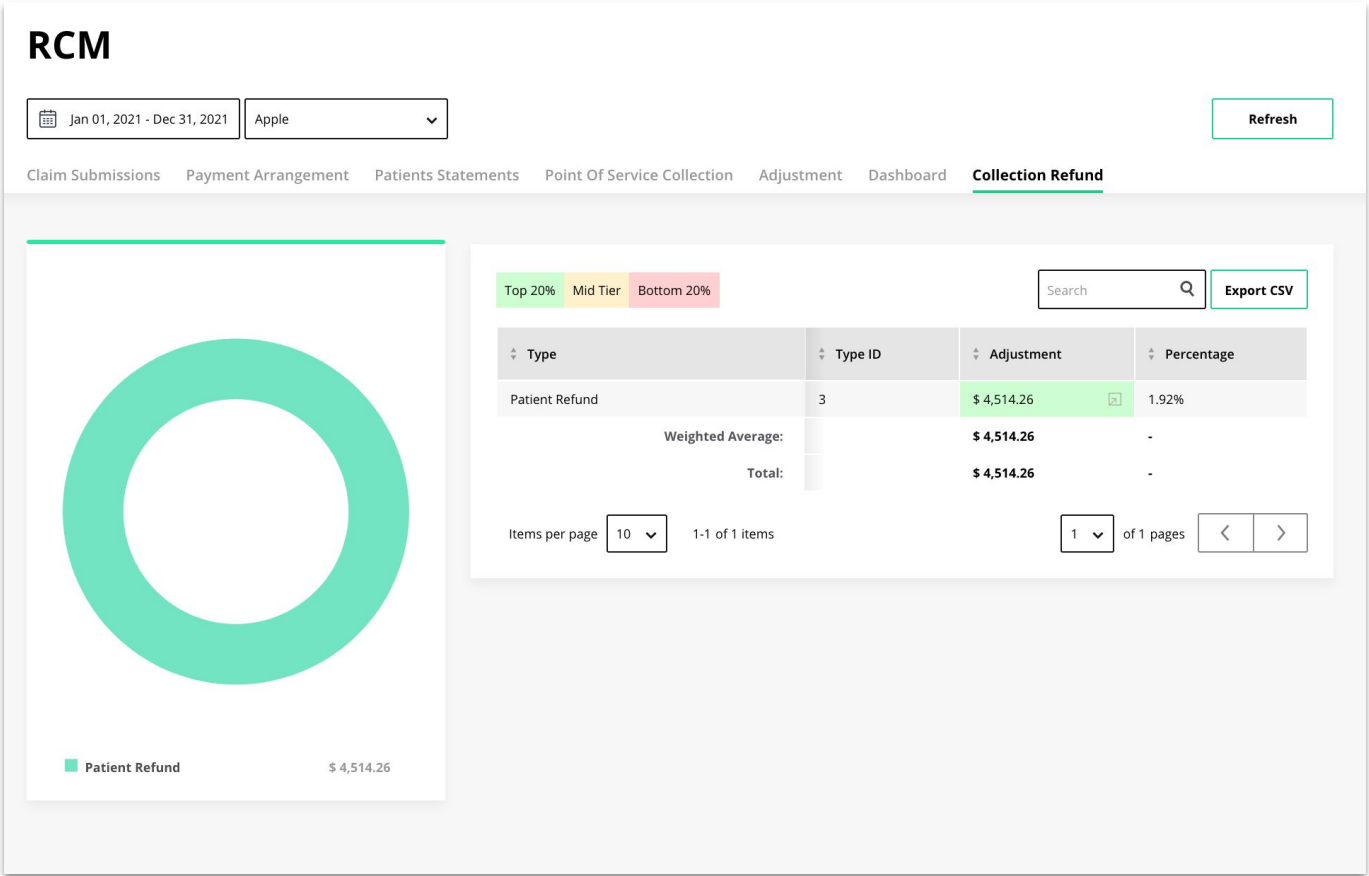
Snapshot

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

| | Basic | | | | | | | |
Location	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 Tooth	$ 70,489.65	$ 60,411.04	0.00%	$ 81,177.51	$ 20,766.47	48.72%	13	$ 5,393.66

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TX Miner

Treatment Miner

📅 September 2021 | Apple ▼ | ⬤ Exclude Rejected TX plans ⓘ | **Refresh**

Provider(s) | **Procedure(s)** | **Patient(s)** | **Line Of Business(es)**
Select a Provider ▼ | Select a Procedure ▼ | Select a Patient ▼ | 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.
October 2020	$ 272,376.29	$ 20,200.18	$ 170,023.21	$ 82,152.90	37.86%	131	$ 2,079.21	76.
November 2020	$ 224,696.71	$ 6,507.48	$ 135,201.32	$ 82,987.91	40.34%	90	$ 2,496.63	73.
December 2020	$ 370,839.63	$ 7,286.89	$ 256,159.35	$ 107,393.39	31.39%	143	$ 2,593.28	84.
January 2021	$ 316,968.43	$ 5,918.60	$ 216,532.60	$ 94,517.23	32.69%	149	$ 2,127.30	86.
February 2021	$ 367,473.83	$ 6,050.40	$ 256,760.22	$ 104,663.21	31.45%	162	$ 2,268.36	84.
March 2021	$ 691,658.79	$ 4,749.12	$ 553,274.24	$ 133,635.43	21.02%	166	$ 4,166.62	87.
April 2021	$ 403,894.63	$ 10,596.64	$ 259,255.93	$ 134,042.06	37.41%	140	$ 2,884.96	88.
May 2021	$ 428,039.50	$ 9,173.62	$ 291,875.50	$ 126,990.38	33.50%	150	$ 2,853.60	88.
June 2021	$ 388,918.38	$ 11,971.54	$ 264,981.52	$ 111,965.32	34.45%	162	$ 2,400.73	84.
July 2021	$ 368,487.45	$ 13,168.12	$ 241,365.04	$ 113,954.29	36.02%	135	$ 2,729.54	95.
August 2021	$ 455,349.35	$ 15,161.22	$ 309,696.15	$ 130,491.98	34.20%	161	$ 2,828.26	84.
September 2021	$ 446,364.01	$ 28,727.95	$ 303,025.67	$ 114,610.39	32.13%	124	$ 3,599.71	88.

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.

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.

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.
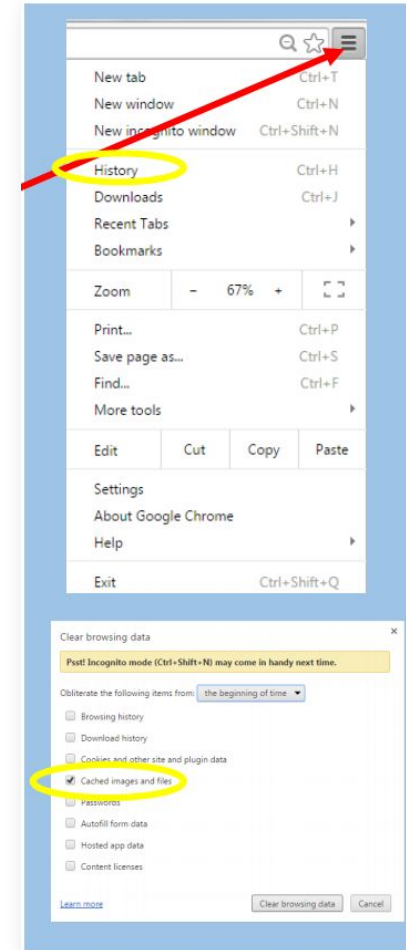
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Q&A

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' : 'Prostho, fixed',

- 'D7110'-'D7999' : 'Oral Surgery',

- 'D8010'-'D8999' : 'Orthodontics',

- 'D9110'-'D9999' : 'Adjunct Serv',

- '15000'-'15115' : 'Conditions',

- '20999'-'209999' : 'Other'

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Thank you

✉ support@jarvisanalytics.com

📞 866 9-JARVIS | 866-952-7847

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