iCoreConnect

# iCoreHuddle+

Revenue Analytics Dashboard | Technical and User Guide

# Table of Contents

# What is iCoreHuddle+?

## iCoreHuddle+ Overview:

iCoreHuddle+ acts as your mission control, with the main goal being to increase profitability and efficiency within your practice. iCoreHuddle+ combines active data from your practice management software with real-time insurance benefits data to give you the most up to date practice information.

- View a detailed dashboard that allows staff to have a quick view of meaningful analytics.
- Send Electronic Prescriptions and connect to the state's prescription drug monitoring program (PMP) all within the same platform.
- Save time by automatically obtaining insurance verification for all scheduled patients a full week in advance of their visit.
- Utilize the built-in task management system to ensure daily, weekly, and monthly staff responsibilities are completed as assigned.
- Set personalized targets and monitor progress toward daily, weekly, monthly, & annual goals for your practice.
- Monitor patients Recall status, A/R balance and identify unscheduled Treatment Plans without the need to run separate reports.

# iCoreHuddle+ Features

## Navigation Bar:

The navigation bar helps users access the various features of iCoreHuddle+.


## Navigation Bar Features:


### Search Bar (Top):

Use this search field to find any existing active patient in your Practice Management Software database.

### Username:

Clicking the account's username opens the user menu. Users will be presented with various options to manage their account.

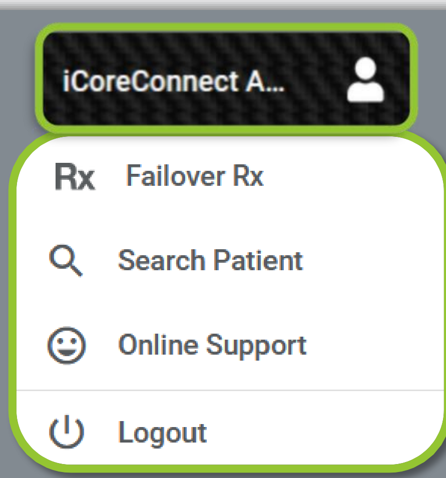
## User Menu:

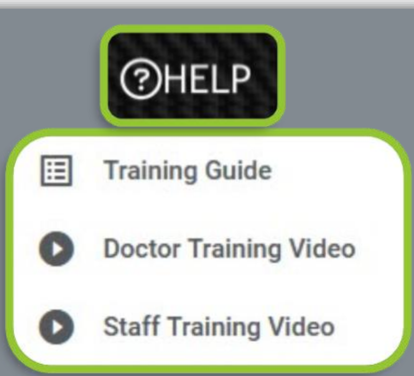
**Failover Rx:** The failover Rx feature is a fail-safe, valuable tool to use in emergencies, loss of connection to your practice management software, or when the server is down.

**Search Patient:** Search for a patient inside your Practice Management Software database. The result will pull up the patient's summary.

**Online Support:** Contact iCoreConnect Support.

**Logout:** Securely signs out the user.




## Help Menu:

Provides access to training materials.

## Practice:

Allows users with multiple locations to switch to other practices.

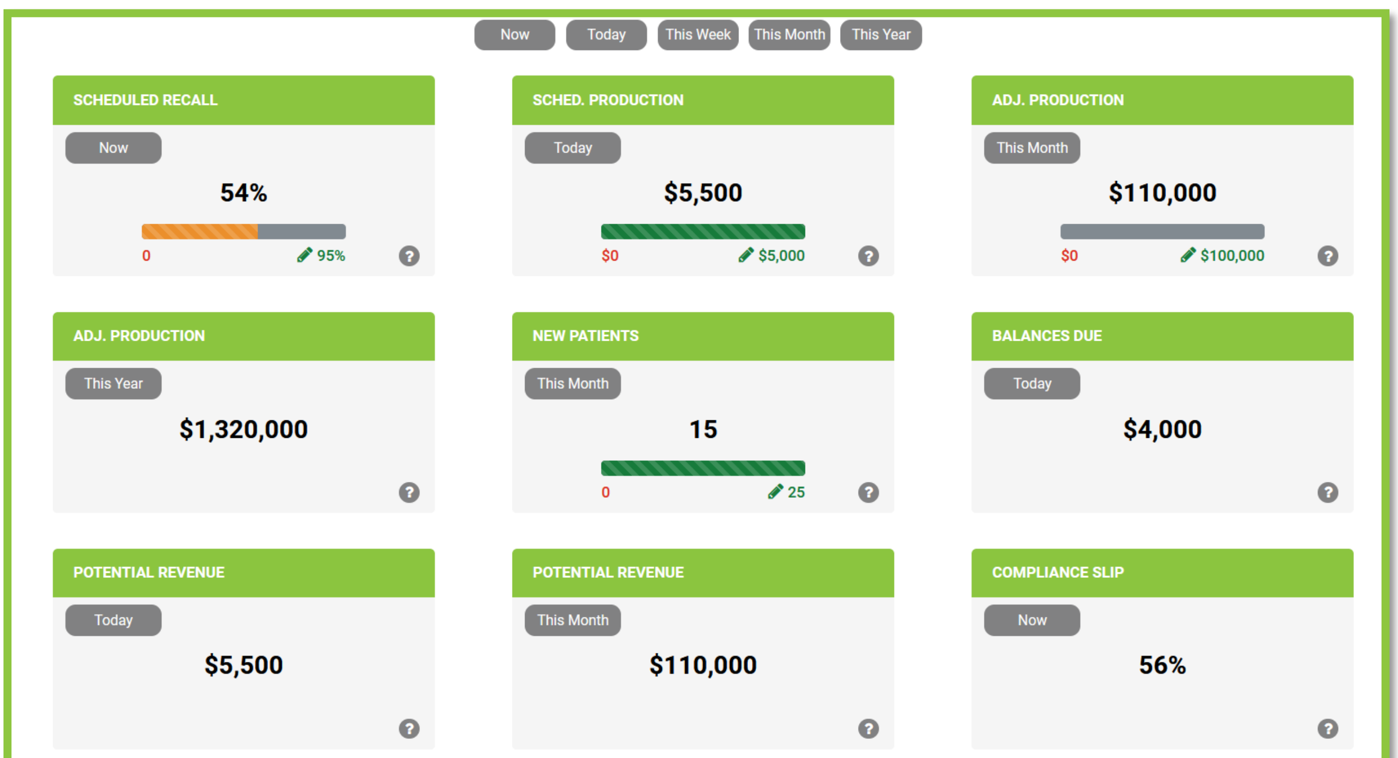



↑ | Click to Return to Top

# Dashboard Tab:

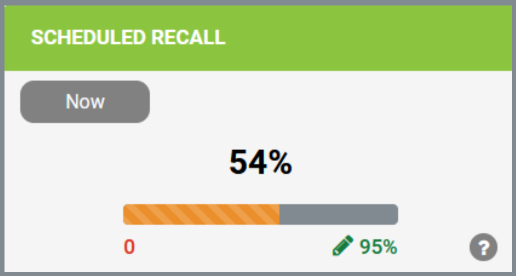
The dashboard tab displays your current practice metrics. On this screen, you will be presented with a snapshot of current key performance indicators to help you effectively manage your practice. Immediately identify key numbers to assess recall performance while keeping an eye on daily production and new patient volume. Maintain practice viability by determining patients with an existing balance or patients that have unscheduled treatment plans.

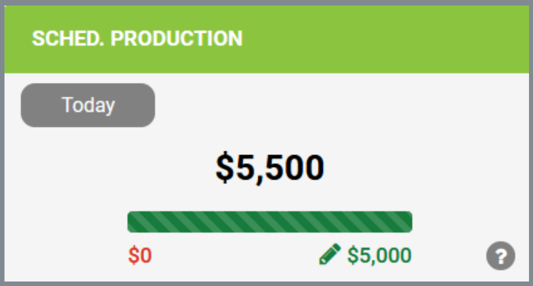
Click the green heading of each table in iCoreHuddle+ to see more detailed information.



## Scheduled Recall:

This is the percent of your current patient list eligible for hygiene appointments who are on your schedule. Most practices average between 60% - 70% recall. Since practice benchmarks suggest that 20% of exams result in the need for restorative treatment (averaging $500 per patient) it's best to aim high.



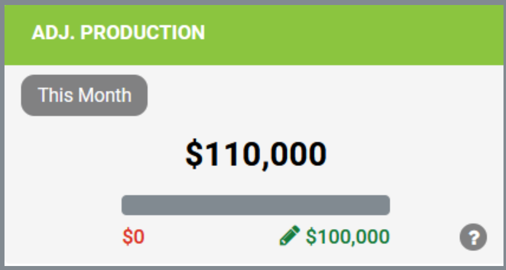



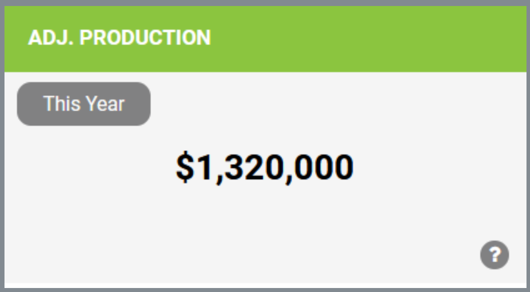

## Scheduled Production:

This is the total amount of hygiene and restorative work scheduled to be completed today. You can use Scheduled Production to see if you are meeting your practice's revenue goals. You can adjust your goals by updating the settings within the Targets tab.

## Adj. Production this month:

The month’s production revenue after adjustments and write offs. Monitor this to ensure you can meet your monthly goals.



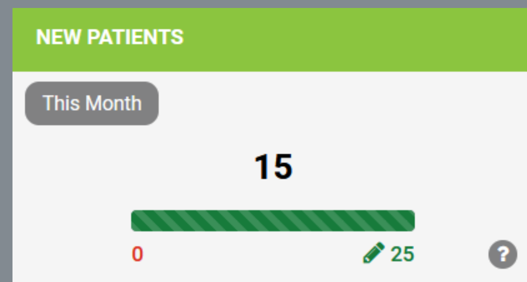



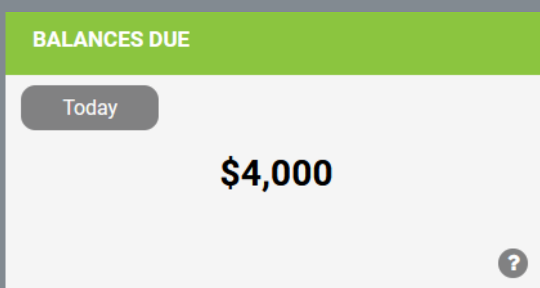

## Adj. Production this year:

The year’s production revenue after adjustments and write offs. Monitor this to ensure you can meet your annual goals.

## New Patients:

This will show patients whose first-ever appointment occurred this month. Studies show an individual dentist requires 25 or more new patients per month to achieve consistent growth.



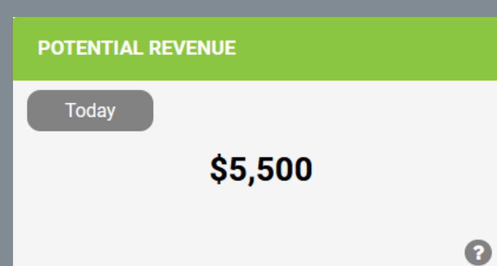




## Balances Due:

Displays total A/R for patients on today's schedule to aid with collection efforts.

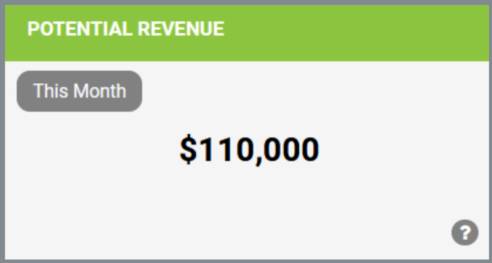
## Potential Revenue TODAY:

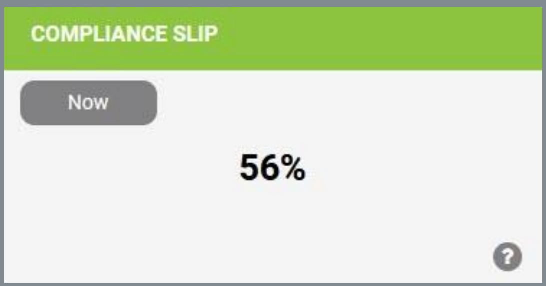
Potential Revenue indicates total revenue for unscheduled treatment plans for today's patients. Easily identify these patients to increase your case acceptance rates.



## Potential Revenue THIS MONTH:

Potential Revenue indicates total revenue for unscheduled treatment plans for this month's patients. Easily identify these patients to increase your case acceptance rates.




## Compliance Slip:

This is an indicator of patients that may be slipping through the cracks. This is the percent of current patients who have not scheduled recommended restorative work. The higher the number is, means that more patients are slipping through and not scheduling.

# Scheduled Patients Tab:

Today's scheduled patients tab allows users, at a glance, to view real time updates regarding patient information. This page is your go to source to ensure you are having meaningful interactions with your patients while they are in office. Easily see who needs to schedule a treatment plan, schedule their next recall, or who has an unpaid balance. You can also instantly connect to the state's PMP report and send electronic prescriptions from this screen.

Click on any patient's name to navigate to their patient summary page.

| Time | Last Name | First Name | Primary Provider | Secondary Provider | Treatment Plan | Recall | Insurance | Balance Alert | Benefits Check | PMP Report | Send Rx |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 7:00 AM | Hennings | Cynthia | Elgar, N. | NA | Off Plan | To Be Scheduled | | | INS | PMP | Rx |
| 8:00 AM | Tuohy | Alexis | Elgar, N. | Ripley, M. | No Plan | Overdue | | | INS | PMP | Rx |
| 8:15 AM | England | Lila | Elgar, N. | NA | No Plan | To Be Scheduled | | | INS | PMP | Rx |
| 9:00 AM | Palmieri | Alexis | Elgar, N. | NA | No Plan | To Be Scheduled | | | INS | PMP | Rx |
| 9:45 AM | Reggiani | Jesse | Elgar, N. | NA | Off Plan | Scheduled | | | INS | PMP | Rx |
| 10:00 AM | Yelman | Cynthia | Michael, B. | NA | No Plan | Overdue | Aflac. | | INS | PMP | Rx |
| 12:00 PM | Quirrel | Ricky | Elgar, N. | Ripley, M. | Off Plan | Scheduled | | DUE | INS | PMP | Rx |
| 12:00 PM | Kasper | Kelly | Elgar, N. | NA | No Plan | Way Overdue | | DUE | INS | PMP | Rx |
| 1:00 PM | Zoldak | Jesse | , . | Ripley, M. | No Plan | Scheduled | COSTCO INSURANCE AGENCY, INC. | DUE | INS | PMP | Rx |
| 1:00 PM | Quirrel | Ricky | Elgar, N. | NA | Off Plan | Scheduled | | DUE | INS | PMP | Rx |

Search

1 2

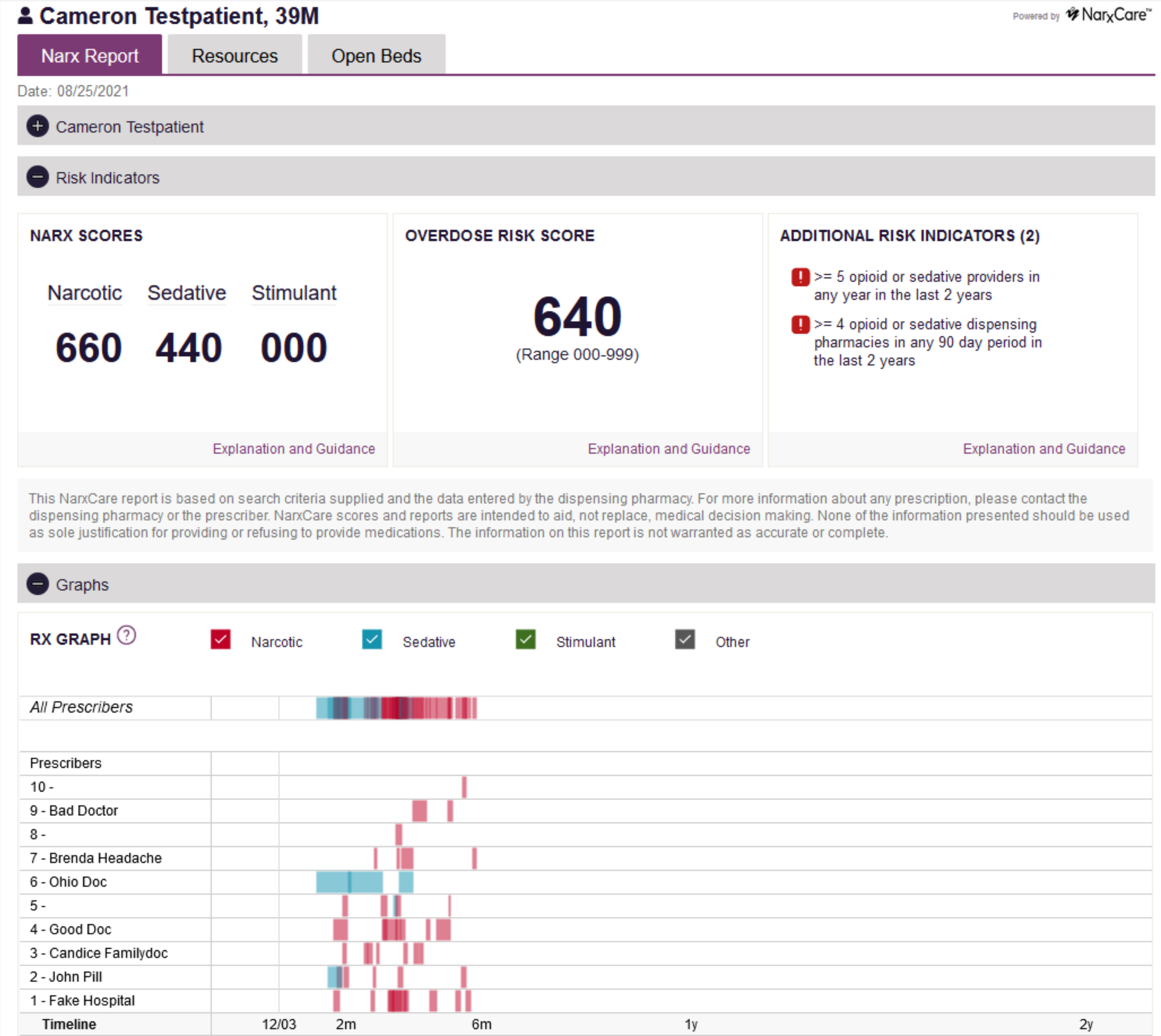
# Patients Tab Explained:

| | |
|---|---|
| **Treatment Plan Column** | See which patients are on, or off, of a treatment plan. |
| **Recall Column** | See if the patient is scheduled for their next appointment. |
| **Insurance Column** | See which insurance provider, if any, the patient currently has. |
| **Balance Alert Column** | See if the patient has an outstanding balance with your practice. |
| **Benefits Check Column** | See real time benefit information such as the Payer, Coverage Type, Coverage Dates, Deductible and Maximum for all networks, and Coverage information. |
| **PMP Column** | See real time PMP information directly from your state's controlled substance monitoring database. |
| **Send Rx Column** | Quickly access the e-Prescribing site in order to write prescriptions for your patients. For more information on e-Prescribing click **HERE.** |

# PMP button explained:

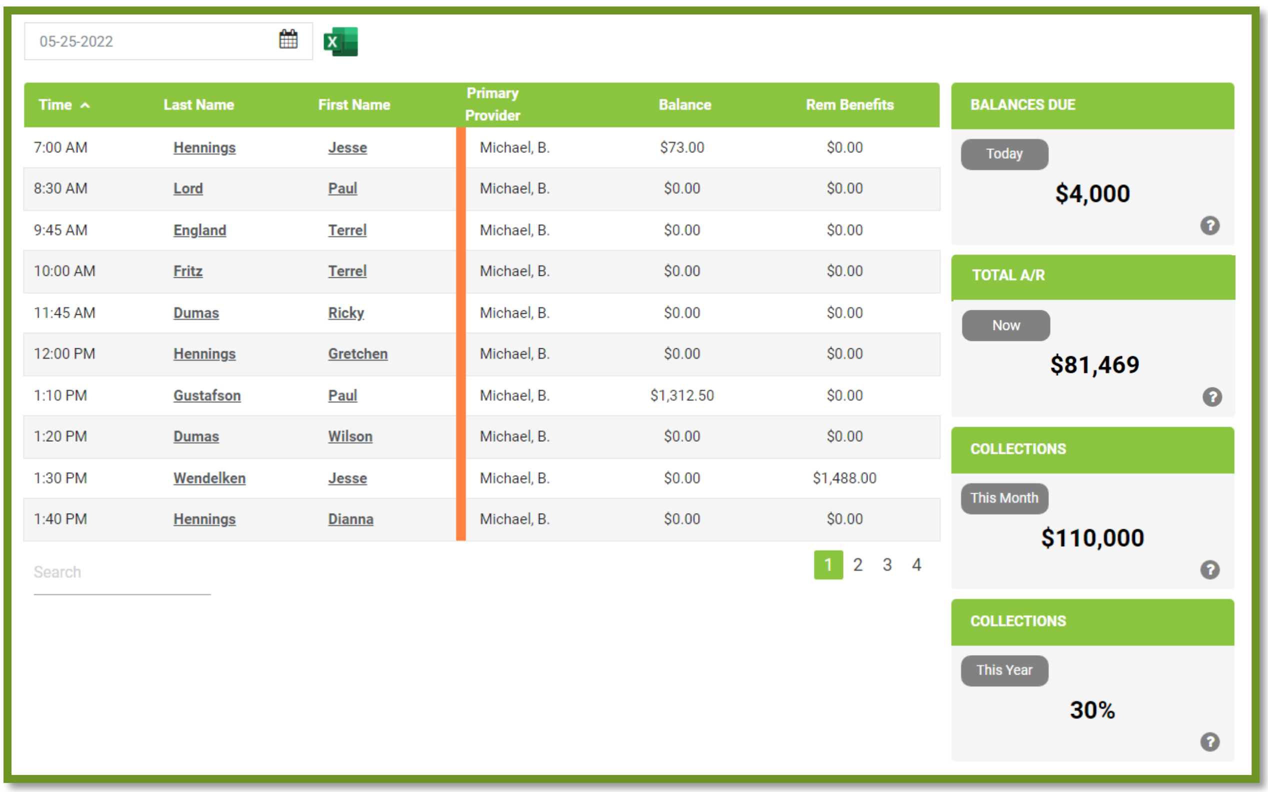
Prescription Monitoring Programs (PMP) are state run databases that tracks a patient's controlled substance activity. This feature will save the doctor 5 minutes per query by integrating it into the Huddle platform.

For more info on how to read a PMP report click HERE.



# Accounts Receivable Tab:

This page will allow you to measure your current, uncollected production and help prevent delays in payment. Actively monitor balances due from patients on your schedule today. See the total amount owed to the practice at this moment, from all sources. View collections received for the current month as well as the percent of revenue collected this year.



05-25-2022

| Time | Last Name | First Name | Primary Provider | Balance | Rem Benefits |
|---|---|---|---|---|---|
| 7:00 AM | Hennings | Jesse | Michael, B. | $73.00 | $0.00 |
| 8:30 AM | Lord | Paul | Michael, B. | $0.00 | $0.00 |
| 9:45 AM | England | Terrel | Michael, B. | $0.00 | $0.00 |
| 10:00 AM | Fritz | Terrel | Michael, B. | $0.00 | $0.00 |
| 11:45 AM | Dumas | Ricky | Michael, B. | $0.00 | $0.00 |
| 12:00 PM | Hennings | Gretchen | Michael, B. | $0.00 | $0.00 |
| 1:10 PM | Gustafson | Paul | Michael, B. | $1,312.50 | $0.00 |
| 1:20 PM | Dumas | Wilson | Michael, B. | $0.00 | $0.00 |
| 1:30 PM | Wendelken | Jesse | Michael, B. | $0.00 | $1,488.00 |
| 1:40 PM | Hennings | Dianna | Michael, B. | $0.00 | $0.00 |

Search

1 2 3 4

BALANCES DUE
Today
$4,000

TOTAL A/R
Now
$81,469

COLLECTIONS
This Month
$110,000

COLLECTIONS
This Year
30%

# iCoreVerify Tab:

iCoreVerify runs automated insurance verification reports for every patient on your schedule a full week in advance. Your administrative staff can free up many hours per day otherwise spent on the telephone and on websites requesting the verification reports. Having automatic insurance verification reports means more accurate estimates, higher case acceptance and a lot less time spent adjusting and/or otherwise chasing down payments.

Use the icons under Benefits Check to view the report. See next page for more info.

SCHEDULED REVENUE 03-01-2022

| Time | Last Name | First Name | Primary Provider | Secondary Provider | Remaining Benefits | Insurance | Benefits Check |
|---|---|---|---|---|---|---|---|
| 9:00 AM | Wendelken | Alexis | Michael, B. | Ripley, M. | $0.00 | DELTA DENTAL | |
| 9:00 AM | Zoldak | Yvette | Michael, B. | NA | $0.00 | aetna | |
| 9:00 AM | Gustafson | Jesse | Michael, B. | NA | $0.00 | UnitedHealthcare | |
| 9:45 AM | England | Lila | Michael, B. | NA | $0.00 | ASSURANT | |
| 10:00 AM | Bunyan | Marcus | Michael, B. | NA | $0.00 | BlueCross BlueShield | |
| 10:00 AM | Dumas | Alexis | Michael, B. | NA | $0.00 | Cigna | |
| 10:00 AM | Szporluk | Ricky | Michael, B. | NA | $0.00 | Cigna | |
| 10:00 AM | Jarret | Ricky | Michael, B. | Ripley, M. | $0.00 | COSTCO INSURANCE AGENCY, INC. | |
| 10:45 AM | Szporluk | Ricky | Michael, B. | NA | $0.00 | Guardian | |
| 11:00 AM | Jarret | Irene | Michael, B. | Callie, W. | $0.00 | Humana | |

Search 1 2 3

# iCoreVerify - Benefits Check

## Icon Color Meanings:

These icons list the status of the information required to perform a Real-Time Benefit Check (RTBC). Looking at the icon’s color indicates whether the report was successfully generated or if a correction needs to be made inside the patient's chart.

## What Does Each Color Mean?

### Green:

- Green icons indicate the report was retrieved successfully and the patient/insurance info provided is valid.

### Yellow

- Yellow icons indicate that there is missing or invalid information from the patient and/or insurance.

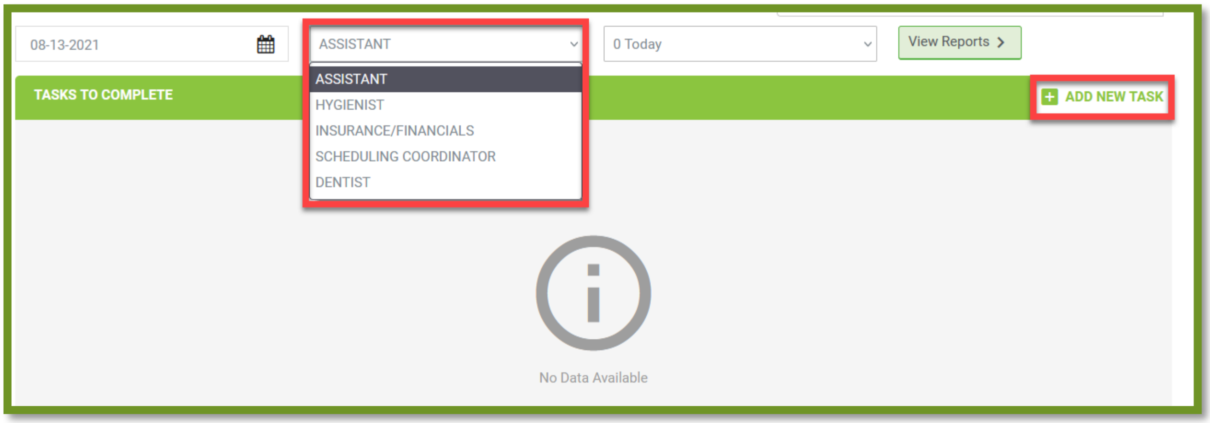
### Blue:

- Blue icons indicate that the real time benefit check failed.

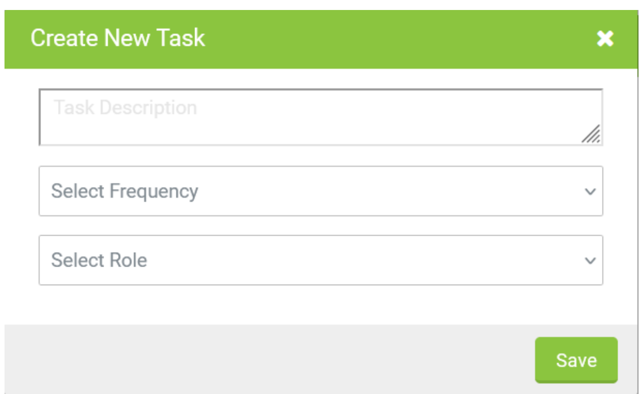
For more information on how to utilize the benefits check, click **HERE**

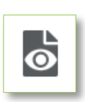
# To Do Tab:

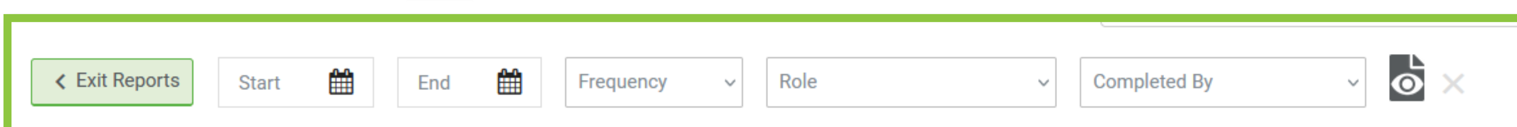
Practice managers can set up daily, weekly, and monthly tasks by role that they want their staff to perform. Establish accountability and a visual sense of accomplishment when staff can check what needs to be done each day and mark it as complete when finished.




When Add a New Task is clicked on in the top right corner, it will display the option to create a new task, choose how often that task will be completed and choose who will be completing that task.

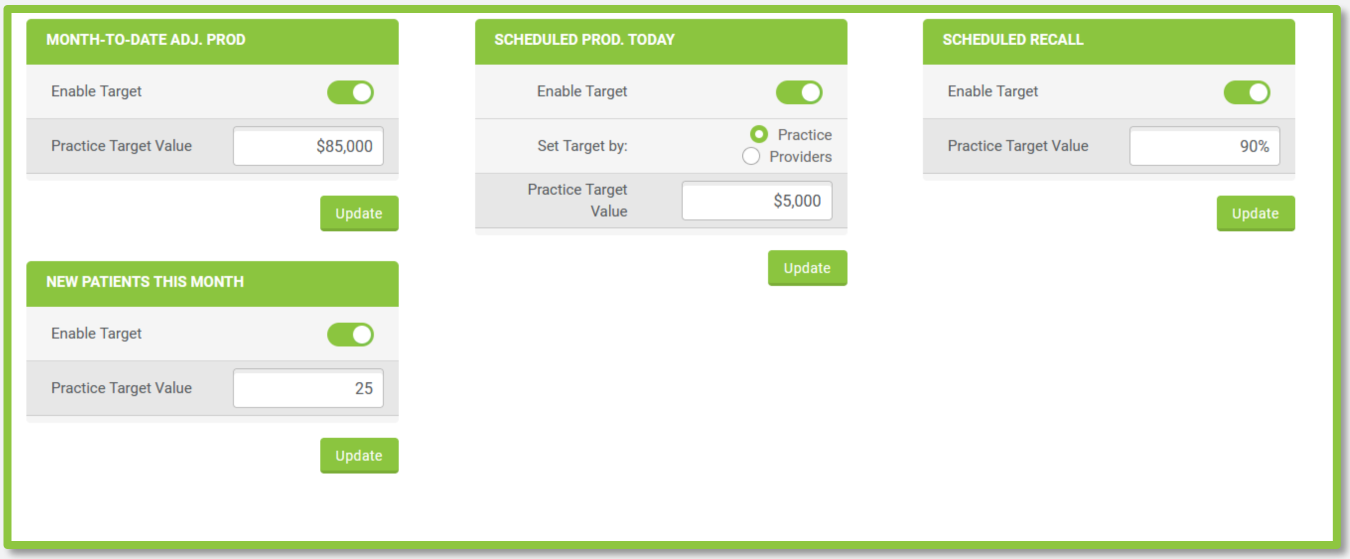



When **'View Report'** is clicked on, it will present search criteria for the report you wish to view. Click on the icon  to view the report.



# Targets Tab:

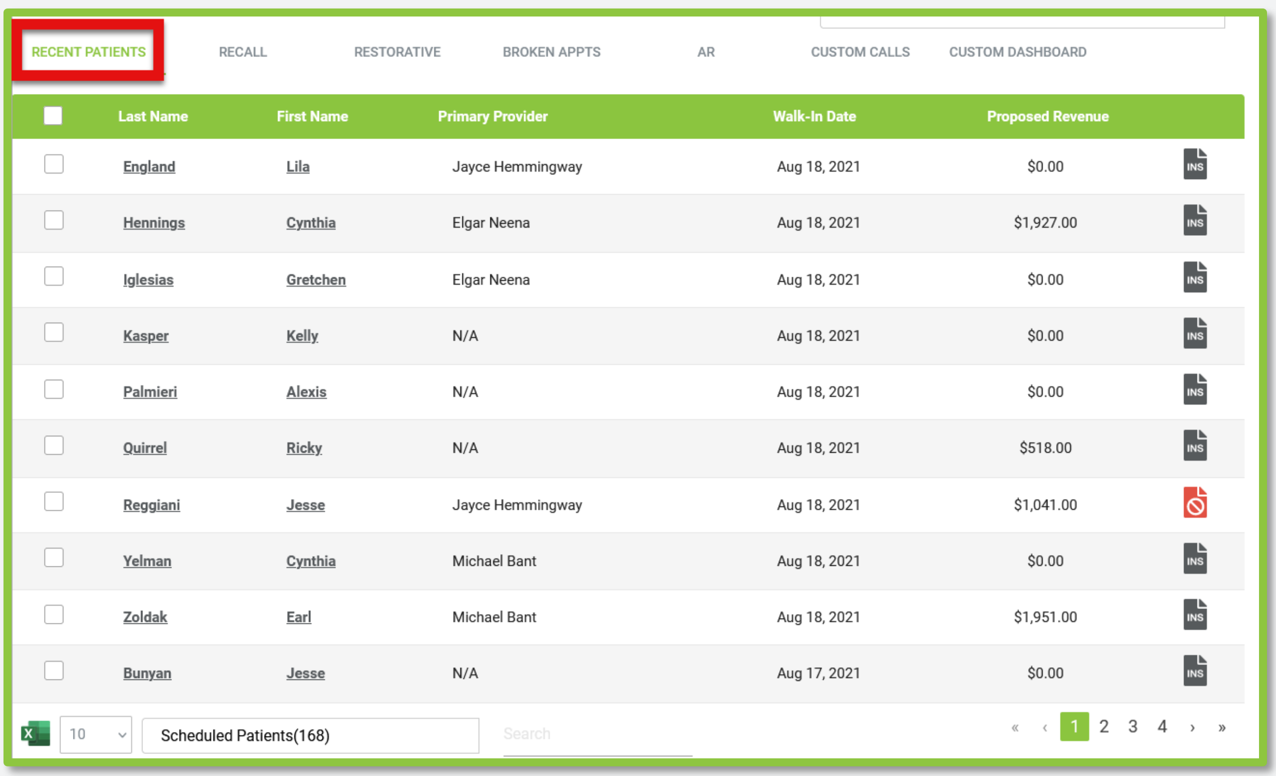
Keep track of the practice's goals, seen on the dashboard tab, by setting targets. Set specific goals for the practice to achieve and update accordingly as metrics change. Simply change the practice's goals by typing in the Target Value and Clicking the 'Update' button.



# Huddle Plus Tab Features:

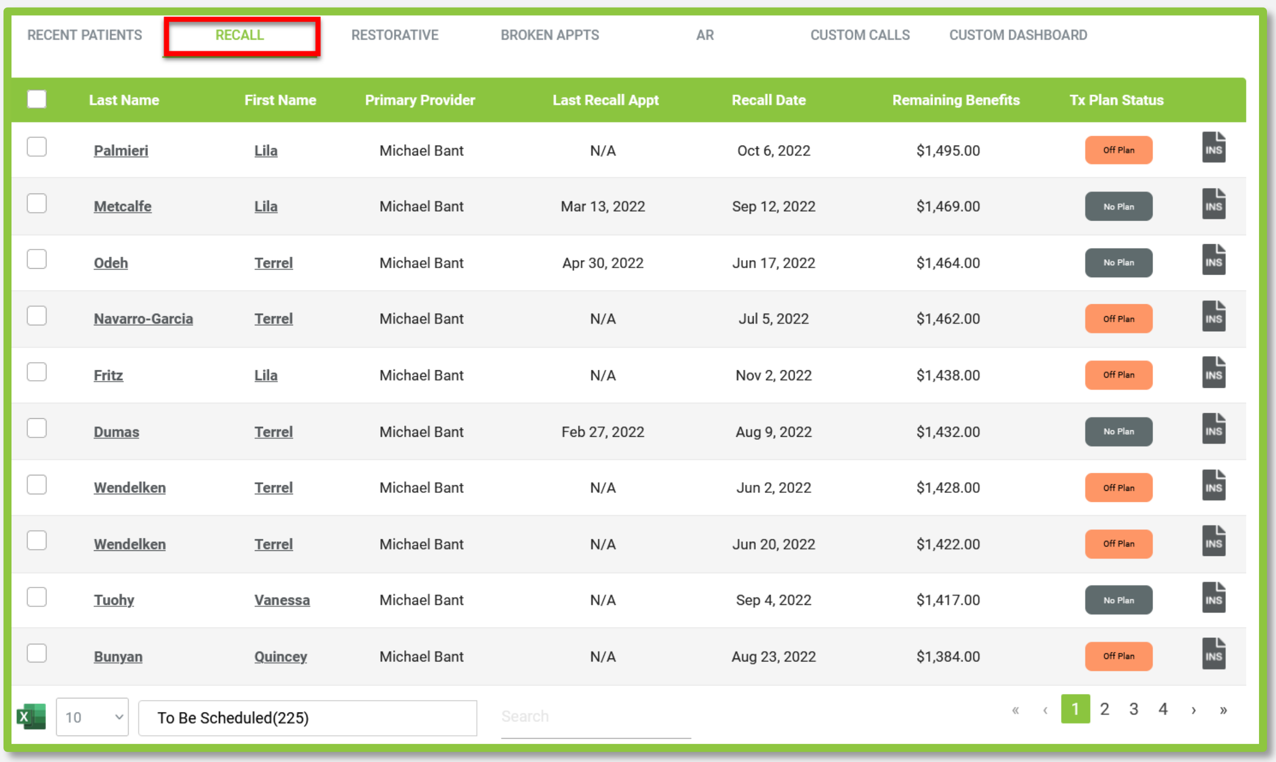
## Recent Patients:

Recent Patients will display the date the patient was seen, how much proposed revenue they would bring the practice, and their insurance information. Click on any of the list items to view the patient summary page for more details. Click on the INS icon to view patient insurance information. To export specific patients from this screen as a CSV file, select the box next to the patient(s) and then click on the excel icon in the bottom left corner.



# Recall:

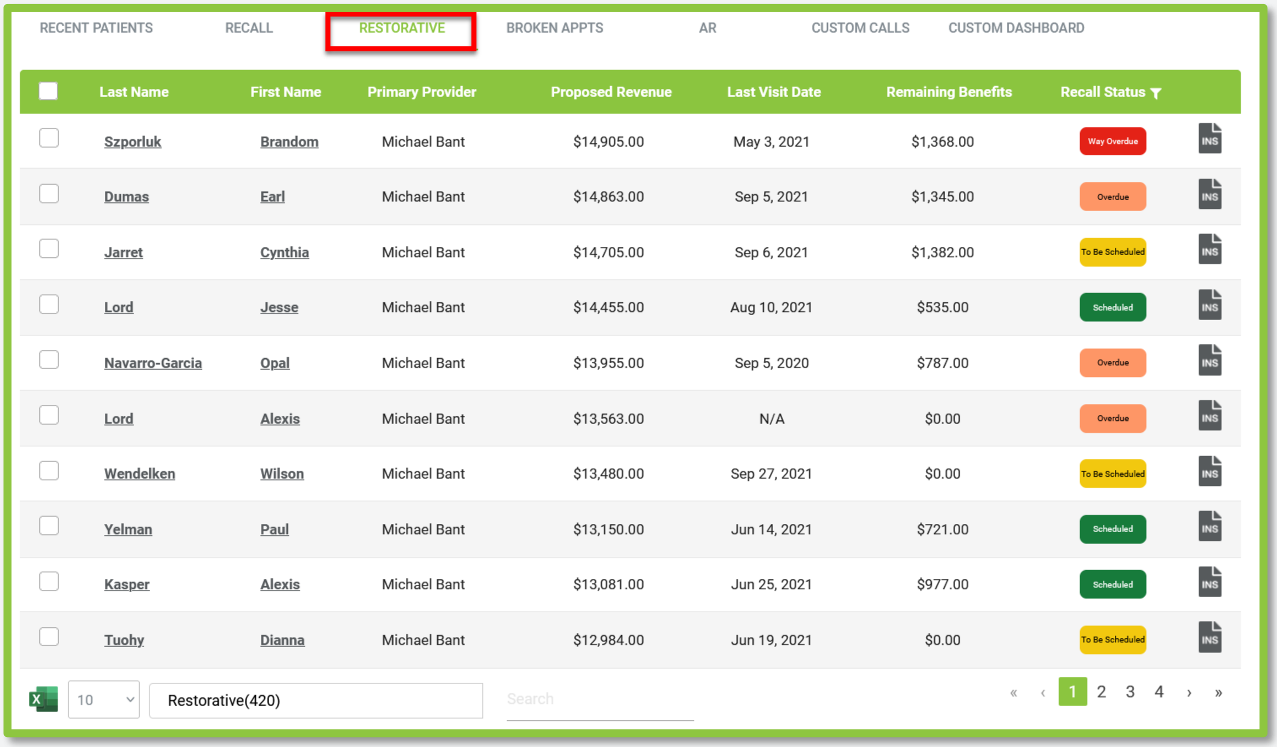
Recall will display the patients needing to schedule their next appointment. This page will display the patient's last recall appointment, recall date, remaining benefits, the status of their treatment plan, and access to their insurance information. Click on any of the list items to view the patient summary page for more details. Click on the INS icon to view the patient's most recent RTBC report and/or request a new one.




| Last Name | First Name | Primary Provider | Last Recall Appt | Recall Date | Remaining Benefits | Tx Plan Status | |
|---|---|---|---|---|---|---|---|
| Palmieri | Lila | Michael Bant | N/A | Oct 6, 2022 | $1,495.00 | Off Plan | INS |
| Metcalfe | Lila | Michael Bant | Mar 13, 2022 | Sep 12, 2022 | $1,469.00 | No Plan | INS |
| Odeh | Terrel | Michael Bant | Apr 30, 2022 | Jun 17, 2022 | $1,464.00 | No Plan | INS |
| Navarro-Garcia | Terrel | Michael Bant | N/A | Jul 5, 2022 | $1,462.00 | Off Plan | INS |
| Fritz | Lila | Michael Bant | N/A | Nov 2, 2022 | $1,438.00 | Off Plan | INS |
| Dumas | Terrel | Michael Bant | Feb 27, 2022 | Aug 9, 2022 | $1,432.00 | No Plan | INS |
| Wendelken | Terrel | Michael Bant | N/A | Jun 2, 2022 | $1,428.00 | Off Plan | INS |
| Wendelken | Terrel | Michael Bant | N/A | Jun 20, 2022 | $1,422.00 | Off Plan | INS |
| Tuohy | Vanessa | Michael Bant | N/A | Sep 4, 2022 | $1,417.00 | No Plan | INS |
| Bunyan | Quincey | Michael Bant | N/A | Aug 23, 2022 | $1,384.00 | Off Plan | INS |

# Restorative:

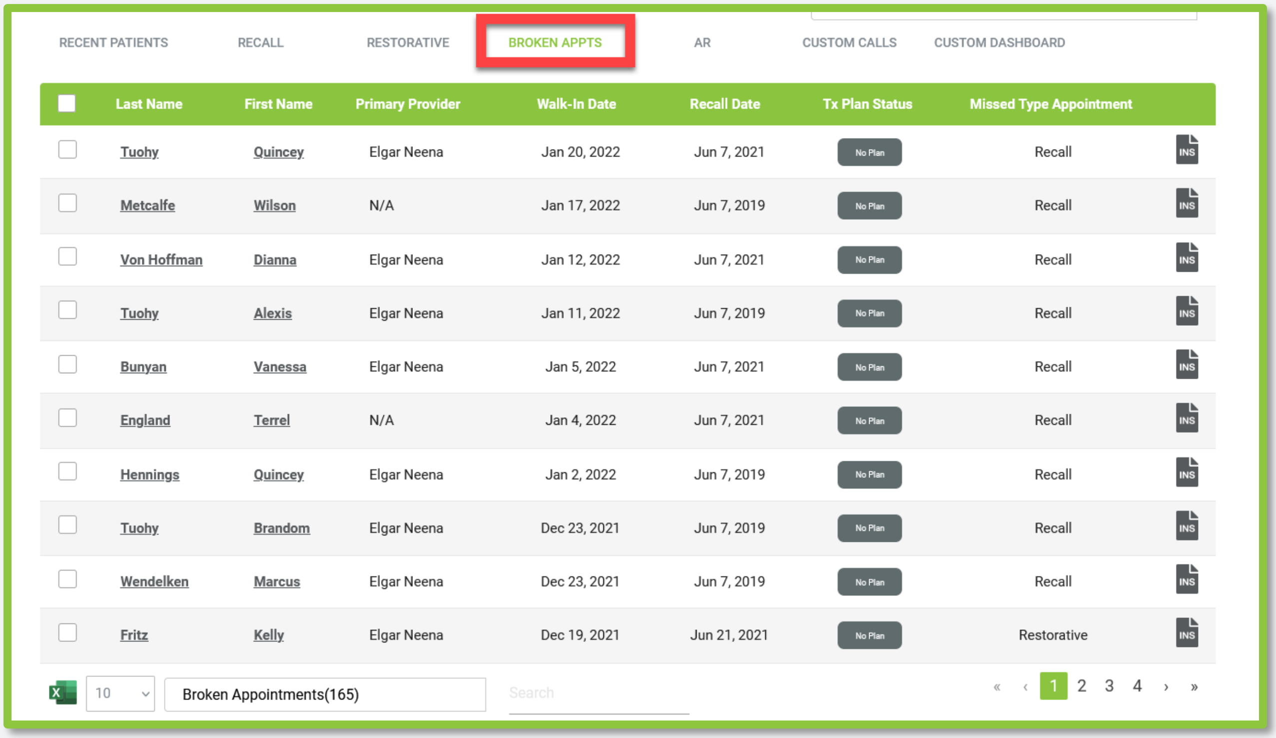
The Restorative tab will show you which patients need to be scheduled for a restorative procedure. This screen will also display the proposed revenue from that appointment, their last visit date, remaining benefits, recall status and their insurance information. Click on any of the list items to view the patient summary page for more details. Click on the INS icon to view the patient's most recent RTBC and/or request a new one.




| Last Name | First Name | Primary Provider | Proposed Revenue | Last Visit Date | Remaining Benefits | Recall Status | |
|---|---|---|---|---|---|---|---|
| Szporluk | Brandom | Michael Bant | $14,905.00 | May 3, 2021 | $1,368.00 | Way Overdue | INS |
| Dumas | Earl | Michael Bant | $14,863.00 | Sep 5, 2021 | $1,345.00 | Overdue | INS |
| Jarret | Cynthia | Michael Bant | $14,705.00 | Sep 6, 2021 | $1,382.00 | To Be Scheduled | INS |
| Lord | Jesse | Michael Bant | $14,455.00 | Aug 10, 2021 | $535.00 | Scheduled | INS |
| Navarro-Garcia | Opal | Michael Bant | $13,955.00 | Sep 5, 2020 | $787.00 | Overdue | INS |
| Lord | Alexis | Michael Bant | $13,563.00 | N/A | $0.00 | Overdue | INS |
| Wendelken | Wilson | Michael Bant | $13,480.00 | Sep 27, 2021 | $0.00 | To Be Scheduled | INS |
| Yelman | Paul | Michael Bant | $13,150.00 | Jun 14, 2021 | $721.00 | Scheduled | INS |
| Kasper | Alexis | Michael Bant | $13,081.00 | Jun 25, 2021 | $977.00 | Scheduled | INS |
| Tuohy | Dianna | Michael Bant | $12,984.00 | Jun 19, 2021 | $0.00 | To Be Scheduled | INS |

# Broken Appts:

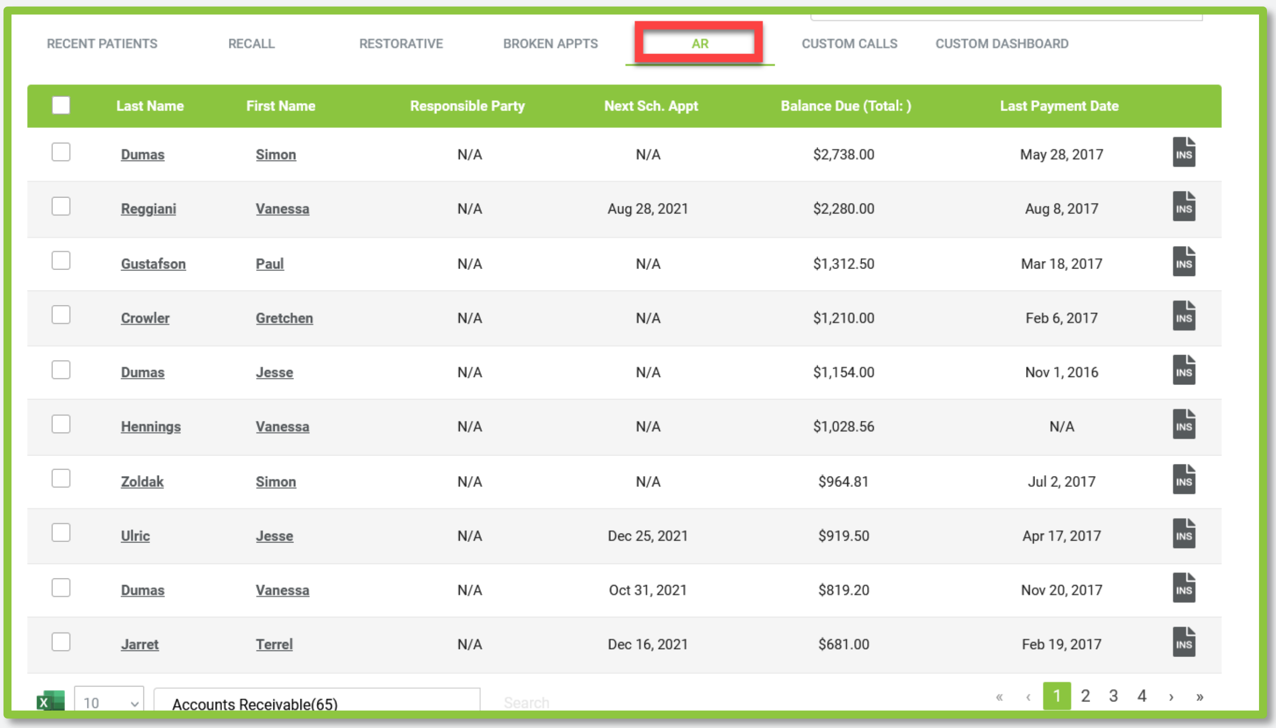
Broken Appts (Appointments) will display all patients with missed appointments. Use this screen to help get patients back into the office quickly. It will list the date they were last seen, their recall date, if they are on a treatment plan, the missed appointment type, and their insurance information. Click on any of the list items to view the patient summary page for more details. Click on the INS icon to view the patient's most recent RTBC report and/or request a new one.




| Last Name | First Name | Primary Provider | Walk-In Date | Recall Date | Tx Plan Status | Missed Type Appointment | |
|---|---|---|---|---|---|---|---|
| Tuohy | Quincey | Elgar Neena | Jan 20, 2022 | Jun 7, 2021 | No Plan | Recall | INS |
| Metcalfe | Wilson | N/A | Jan 17, 2022 | Jun 7, 2019 | No Plan | Recall | INS |
| Von Hoffman | Dianna | Elgar Neena | Jan 12, 2022 | Jun 7, 2021 | No Plan | Recall | INS |
| Tuohy | Alexis | Elgar Neena | Jan 11, 2022 | Jun 7, 2019 | No Plan | Recall | INS |
| Bunyan | Vanessa | Elgar Neena | Jan 5, 2022 | Jun 7, 2021 | No Plan | Recall | INS |
| England | Terrel | N/A | Jan 4, 2022 | Jun 7, 2021 | No Plan | Recall | INS |
| Hennings | Quincey | Elgar Neena | Jan 2, 2022 | Jun 7, 2019 | No Plan | Recall | INS |
| Tuohy | Brandom | Elgar Neena | Dec 23, 2021 | Jun 7, 2019 | No Plan | Recall | INS |
| Wendelken | Marcus | Elgar Neena | Dec 23, 2021 | Jun 7, 2019 | No Plan | Recall | INS |
| Fritz | Kelly | Elgar Neena | Dec 19, 2021 | Jun 21, 2021 | No Plan | Restorative | INS |

# AR (Accounts Receivables):

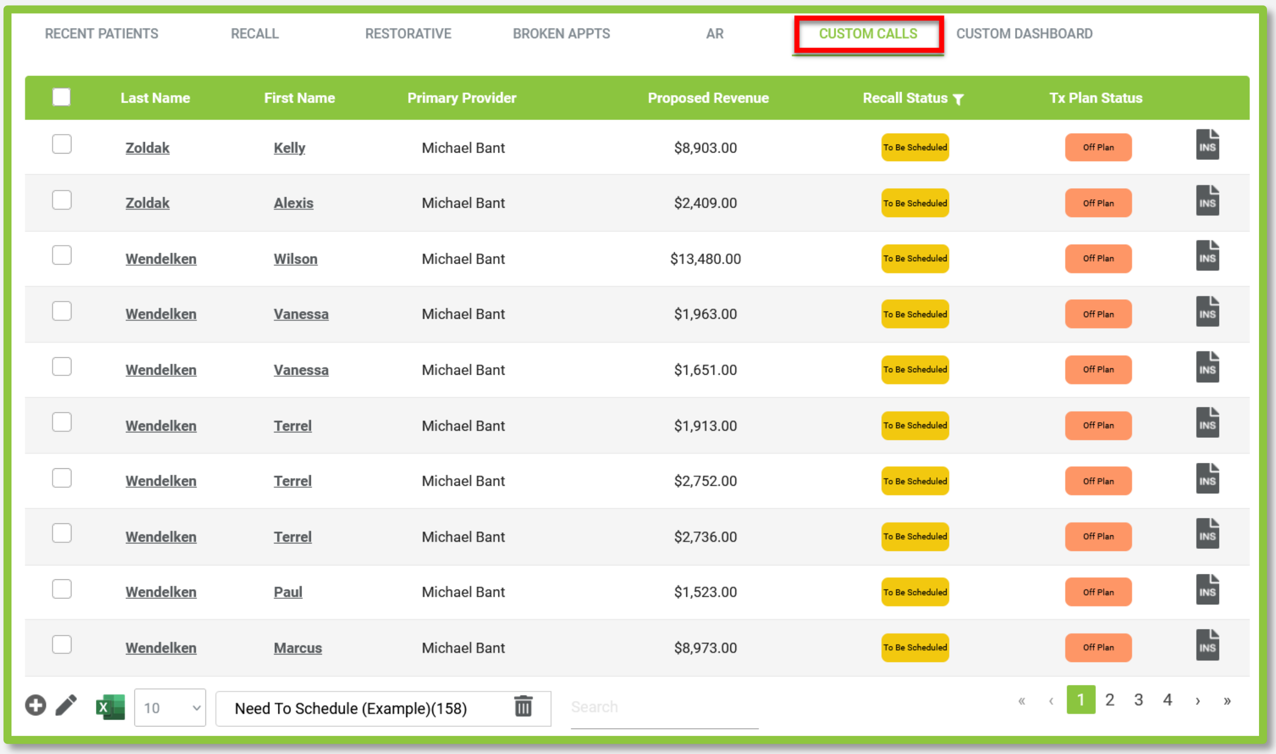
The AR tab will display all patients with outstanding balances. This screen will assist with monitoring current uncollected production and help prevent delays in payment. This screen will list the patient's next scheduled appointment, total balance due, their last payment date, and their insurance information. Click on any of the list items to view the patient summary page for more details. Click on the INS icon to view the patient’s most recent RTBC report and/or request a new one.




| | Last Name | First Name | Responsible Party | Next Sch. Appt | Balance Due (Total: ) | Last Payment Date | |
|---|---|---|---|---|---|---|---|
| | Dumas | Simon | N/A | N/A | $2,738.00 | May 28, 2017 | INS |
| | Reggiani | Vanessa | N/A | Aug 28, 2021 | $2,280.00 | Aug 8, 2017 | INS |
| | Gustafson | Paul | N/A | N/A | $1,312.50 | Mar 18, 2017 | INS |
| | Crowler | Gretchen | N/A | N/A | $1,210.00 | Feb 6, 2017 | INS |
| | Dumas | Jesse | N/A | N/A | $1,154.00 | Nov 1, 2016 | INS |
| | Hennings | Vanessa | N/A | N/A | $1,028.56 | N/A | INS |
| | Zoldak | Simon | N/A | N/A | $964.81 | Jul 2, 2017 | INS |
| | Ulric | Jesse | N/A | Dec 25, 2021 | $919.50 | Apr 17, 2017 | INS |
| | Dumas | Vanessa | N/A | Oct 31, 2021 | $819.20 | Nov 20, 2017 | INS |
| | Jarret | Terrel | N/A | Dec 16, 2021 | $681.00 | Feb 19, 2017 | INS |

# Custom Calls:

Custom Calls will display a list of patients needing to schedule an appointment that are not on a treatment plan. The call back list includes the patient's proposed revenue, recall status, treatment plan status, and insurance information. Utilize this information to aid your patient interactions and increase case acceptance. You can sort by recall status by clicking on the funnel icon.



RECENT PATIENTS | RECALL | RESTORATIVE | BROKEN APPTS | AR | CUSTOM CALLS | CUSTOM DASHBOARD

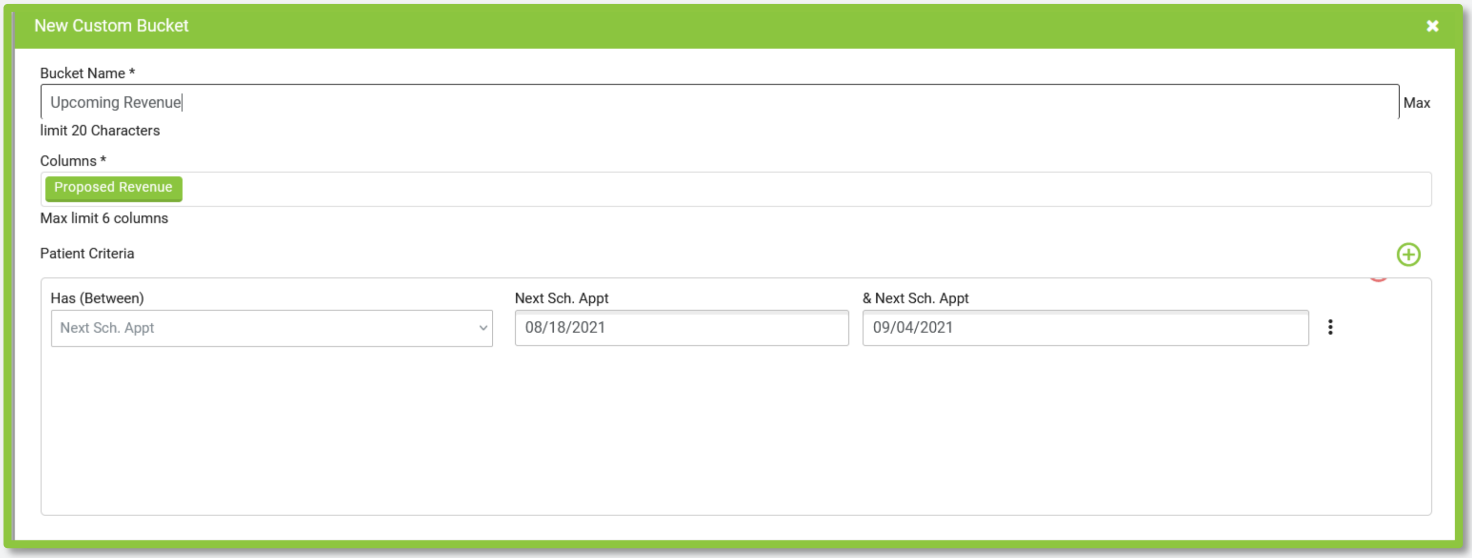
| | Last Name | First Name | Primary Provider | Proposed Revenue | Recall Status | Tx Plan Status | |
|---|---|---|---|---|---|---|---|
| | Zoldak | Kelly | Michael Bant | $8,903.00 | To Be Scheduled | Off Plan | INS |
| | Zoldak | Alexis | Michael Bant | $2,409.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Wilson | Michael Bant | $13,480.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Vanessa | Michael Bant | $1,963.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Vanessa | Michael Bant | $1,651.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Terrel | Michael Bant | $1,913.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Terrel | Michael Bant | $2,752.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Terrel | Michael Bant | $2,736.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Paul | Michael Bant | $1,523.00 | To Be Scheduled | Off Plan | INS |
| | Wendelken | Marcus | Michael Bant | $8,973.00 | To Be Scheduled | Off Plan | INS |

10 | Need To Schedule (Example)(158) | Search | « ‹ 1 2 3 4 › »

## Create Custom Bucket Items for Calls:

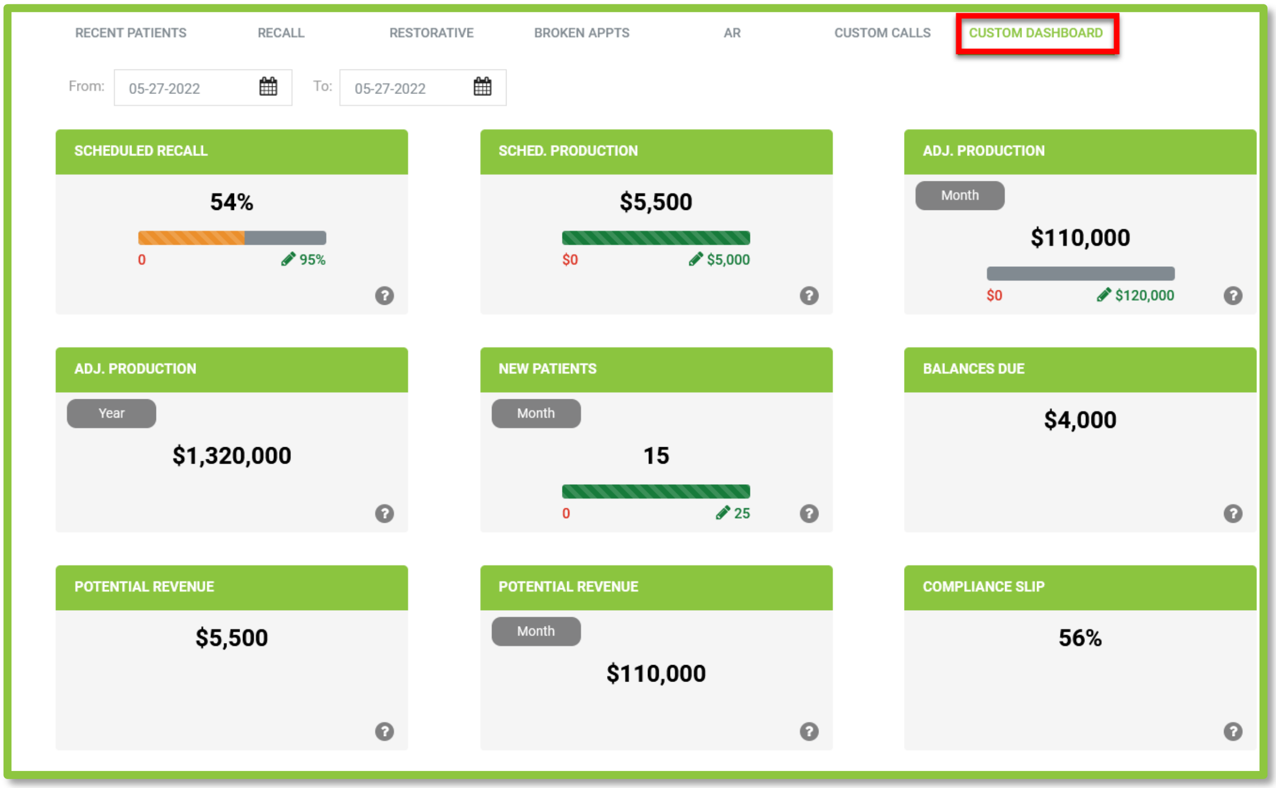
Create a new custom bucket for call by clicking on the Plus sign (+) in the bottom left corner. This will allow the practice to reach specific patients and help narrow down the calls the practice would like to make.


- Type a name for the call list, select which columns you wish to view, and select any criteria you would like to include in your search.
- The search supports most common filter options such as and/or. This allows you to build a specific call bucket.



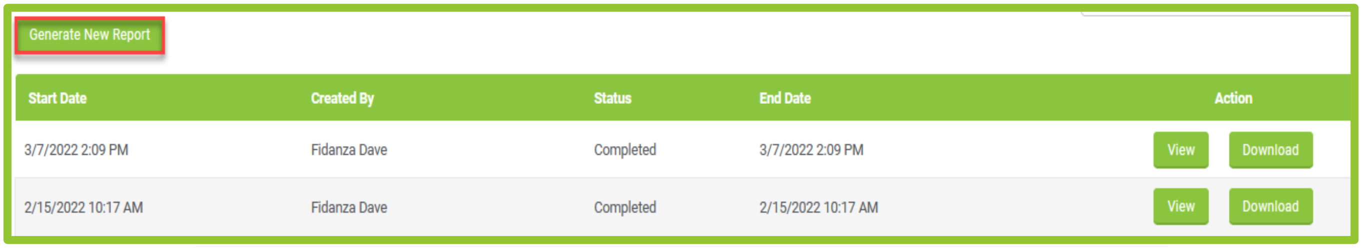
# Custom Dashboard:

The Custom Dashboard tab provides the same data seen on the Main Dashboard tab with the added capability to view data for any day or range of dates. Simply enter the “From” and “To” dates to see the metrics for that day or range of dates.

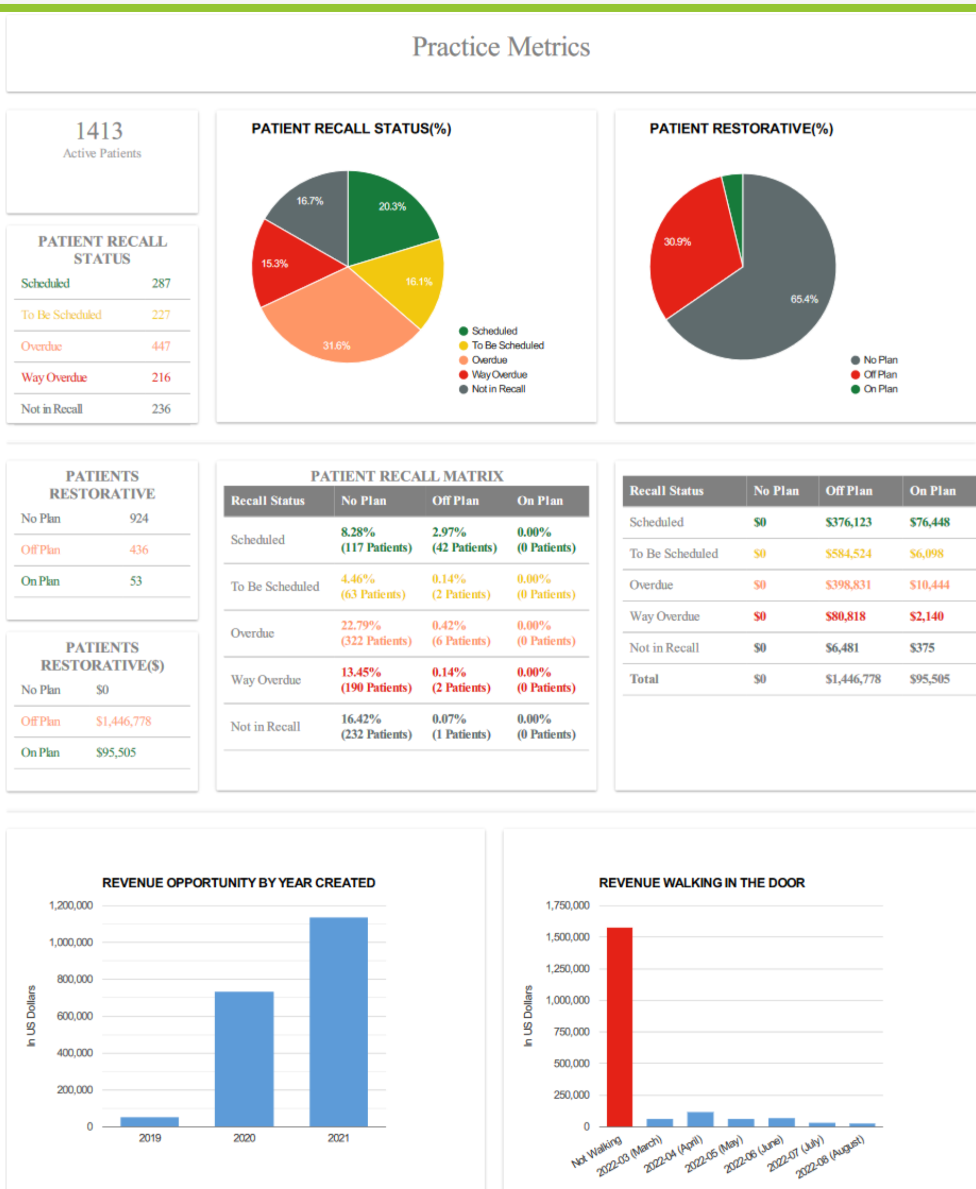


# Practice Metrics:

View a full report of your current practice metrics. Get a current, in depth look at your practice's data points to determine where the practice's health is and what numbers can actively be improved. Click the button Generate New Report to generate a report on the screen.




| Start Date | Created By | Status | End Date | Action |
|---|---|---|---|---|
| 3/7/2022 2:09 PM | Fidanza Dave | Completed | 3/7/2022 2:09 PM | View Download |
| 2/15/2022 10:17 AM | Fidanza Dave | Completed | 2/15/2022 10:17 AM | View Download |




PATIENT RECALL STATUS

| | |
|---|---|
| Scheduled | 287 |
| To Be Scheduled | 227 |
| Overdue | 447 |
| Way Overdue | 216 |
| Not in Recall | 236 |

PATIENTS RESTORATIVE

| | |
|---|---|
| No Plan | 924 |
| Off Plan | 436 |
| On Plan | 53 |

PATIENTS RESTORATIVE($)

| | |
|---|---|
| No Plan | $0 |
| Off Plan | $1,446,778 |
| On Plan | $95,505 |

PATIENT RECALL MATRIX

| Recall Status | No Plan | Off Plan | On Plan |
|---|---|---|---|
| Scheduled | 8.28% (117 Patients) | 2.97% (42 Patients) | 0.00% (0 Patients) |
| To Be Scheduled | 4.46% (63 Patients) | 0.14% (2 Patients) | 0.00% (0 Patients) |
| Overdue | 22.79% (322 Patients) | 0.42% (6 Patients) | 0.00% (0 Patients) |
| Way Overdue | 13.45% (190 Patients) | 0.14% (2 Patients) | 0.00% (0 Patients) |
| Not in Recall | 16.42% (232 Patients) | 0.07% (1 Patients) | 0.00% (0 Patients) |

| Recall Status | No Plan | Off Plan | On Plan |
|---|---|---|---|
| Scheduled | $0 | $376,123 | $76,448 |
| To Be Scheduled | $0 | $584,524 | $6,098 |
| Overdue | $0 | $398,831 | $10,444 |
| Way Overdue | $0 | $80,818 | $2,140 |
| Not in Recall | $0 | $6,481 | $375 |
| Total | $0 | $1,446,778 | $95,505 |

iCoreConnect

# Thank you for reading.

If you require further assistance, feel free to call 888.810.7706. Our U.S.-based support team is here to help you 9am-10pm Eastern time Monday through Friday.