iCoreConnect

iCoreHuddle

Revenue Analytics Dashboard |Technical and User Guide

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What is iCoreHuddle?

iCoreHuddle Overview:

iCoreHuddle acts as your mission control, with the main goal being to increase profitability and efficiency within your practice.

➢ View a detailed dashboard to view real-time KPI performance metrics.

➢ Send Electronic Prescriptions and connect to the state's Prescription Drug Monitoring Program (PDMP) directly at the point of care.

➢ Save time by automating Eligibility and Benefit responses for all scheduled patients a full week in advance of their visit.

➢ Monitor patients Recall status, A/R balance and identify unscheduled Treatment Plans without the need to run a report.

➢ Set personalized targets and monitor progress toward daily, weekly, monthly, & annual goals for your practice.

➢ Utilize the built-in task management system to ensure daily, weekly, and monthly staff responsibilities are completed as assigned.

iCoreHuddle Features

Navigation Bar:

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

Navigation Bar Features:

Search Bar (Top):

Search to find any existing active patient in your Practice Management Software (PMS) 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 (PMS) database. The result will pull up the patient's summary.

Online Support: Contact iCoreConnect Support.

Logout: Securely signs out the user.

iCoreConnect A...

Rx Failover Rx

🔍 Search Patient

⏻ Logout

⑦HELP

📋 Training Guide

😊 Online Support

Help Menu:

Provides access to training materials.
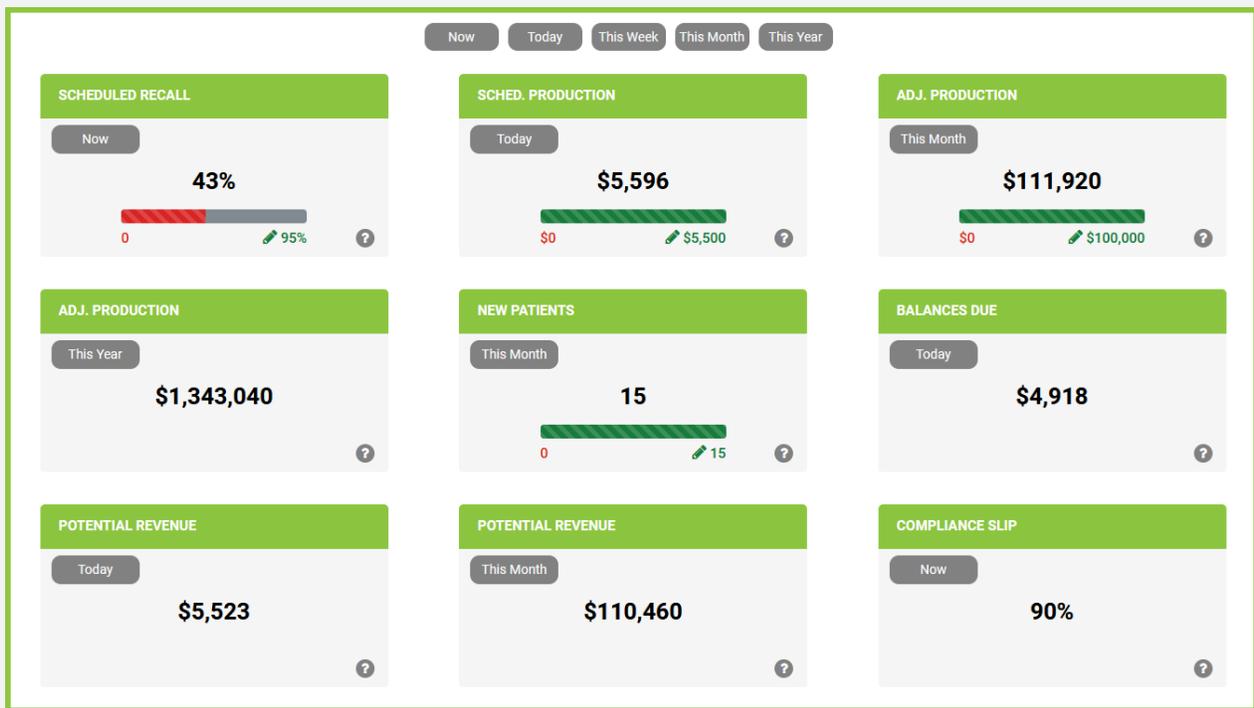
Practice:

Allows users with multiple locations to switch to other practices.

Practice : Select Practice

Dashboard Tab:

Upon login, you will be taken to the Dashboard. 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:

Click on Scheduled Recall. This will display the percentage of current patients eligible for hygiene appointments who are scheduled.

Most practices average between 60% - 70% recall. According to practice benchmarks, 20% of exams result in the need for restorative treatment (average $500 per patient), so it's a good idea to aim high.

SCHEDULED RECALL

Now

54%

0   95%
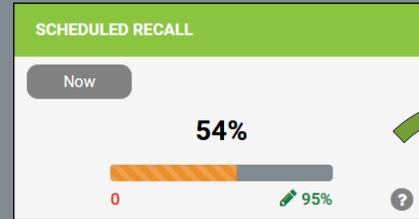
SCHEDULED RECALL	
Name	**Actual**
Scheduled Patients(Sch)	263
To Be Scheduled Patients(TBS)	226
Scheduled Recall([Sch * 100]/[Sch + TBS])	53%

Scheduled Production:

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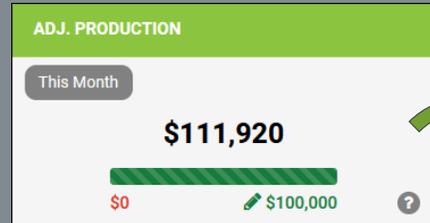
You can use Scheduled Production to see if you are meeting your practice's revenue goals. You can adjust your goals by updating the settings within the Targets tab.

SCHED. PRODUCTION

Today

$5,500

$0 $5,000

SCHEDULED PRODUCTION TODAY	
Name	**Actual**
Michael Bant	$15,154
Callie Whitmal	$0

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 Month

$111,920

$0 $100,000

MONTH TO DATE ADJUSTED PRODUCTION	✕

Name	Actual
Production	$0
Adjustment	$0
Write Off	$0
Adjusted Production(Production + Adjust - Write Offs)	$0

ADJ. PRODUCTION

This Year

$1,320,000

YEAR TO DATE ADJUSTED PRODUCTION	✕

Name	Actual
Production	$0
Adjustment	$0
Write Off	$0
Adjusted Production(Production + Adjust - Write Offs)	$0

## 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.

Also includes first-time patients that have a treatment plan and if they have scheduled their next Recall.

Studies show an individual dentist requires 25 or more new patients per month to achieve consistent growth.

NEW PATIENTS

This Month

15

0   ✏ 15   ❓

PATIENTS
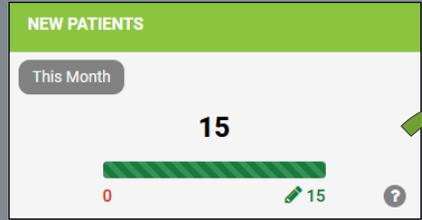
Last Name	First Name	Primary Provider	Secondary Provider	Treatment Plan	Recall ▼
Allen	Alexis	Michael, B.	NA	No Plan	Way Overdue
Allen	Marcus	Michael, B.	Elgar, N.	No Plan	Way Overdue
Allen	Terrel	Michael, B.	NA	Off Plan	Scheduled
Bunyan	Alexis	Michael, B.	NA	No Plan	Way Overdue
Bunyan	Brandom	Michael, B.	Ripley, M.	Off Plan	Overdue

Search   « ‹ **1** 2 3 4 › »

On Plan

No Plan

Off Plan

Treatment Plan:

- Displays if a patient is on a plan, off a plan, or does not have a plan in place.

Scheduled

Way Overdue

Overdue

Recall:

- Displays if a patient is Overdue, Way Overdue, Scheduled, or Needs to be Scheduled for their next appointment.

Recall ▼

☐ Overdue
☐ Scheduled
☐ To Be Scheduled
☐ Way Overdue
☐ Not in Recall

- Users can filter Recall types by clicking the filter icon next to Recall in the header.

↑ | Click to Return to Top

Balances Due:

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

Treatment Plan and Recall status is displayed here as well.

BALANCES DUE

Today

$4,000

Last Name	First Name	Due	Primary Provider	Secondary Provider	Treatment Plan	Recall ▼
Bunyan	Vanessa	$5.00	Michael, B.	NA	Off Plan	Scheduled
Fritz	Alexis	$388.00	Michael, B.	Callie, W.	Off Plan	To Be Scheduled
Gustafson	Paul	$1,312.50	Michael, B.	NA	Off Plan	Scheduled
Hennings	Jesse	$73.00	Michael, B.	NA	Off Plan	To Be Scheduled
Kasper	Vanessa	-$449.00	Michael, B.	Callie, W.	Off Plan	Scheduled

Search   **1** 2 3

POTENTIAL REVENUE

Today

$5,500

Potential Revenue:

Today

Potential Revenue 'Today' indicates total revenue for unscheduled treatment plans for today's patients.

Easily identify these patients to increase your case acceptance rates.

Treatment Plan and Recall status is displayed here as well.

Last Name	First Name	Revenue	Primary Provider	Secondary Provider	Treatment Plan	Recall ▼
Allen	Marcus	$0.00	Michael, B.	Elgar, N.	No Plan	Way Overdue
Bunyan	Vanessa	$4,323.00	Michael, B.	NA	Off Plan	Scheduled
Crowler	Flora	$12,480.00	Michael, B.	NA	Off Plan	Scheduled
Crowler	Jesse	$1,777.00	Michael, B.	NA	Off Plan	Way Overdue
Crowler	Simon	$0.00	Michael, B.	NA	No Plan	Overdue

Search   « ‹ **1** 2 3 4 › »

Potential Revenue:

This Month

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

POTENTIAL REVENUE

This Month

$110,000

OFF PLAN REVENUE FOR MONTH	✕
Name	**Actual**
Michael Bant	$2,002,570
Callie Whitmal	$60,924
	$111,299
Diana Riggles	$172,484
Ripley Meta	$311,488
Elgar Neena	$2,571,920
Jayce Hemmingway	$49,015

COMPLIANCE SLIP

Now

56%

SLIP	✕
Name	**Actual**
Overdue Patients*(OD)*	437
Way Overdue Patients*(WOD)*	214
Scheduled Patients*(Sch)*	263
To Be Scheduled Patients *(TBS)*	226
Slip*([(OD + WOD) * 100]/[OD + WOD + Sch + TBS])*	57%

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.

Scheduled Patients Tab:

On this tab, see a list of today's scheduled patients and view real time updates regarding patient information. 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 PDMP report and send electronic prescriptions from this screen.

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

NOTE: Our optional PDMP integration provides instant access to your State's Prescription Drug Monitoring Program. Ask your Account Manager for more information.

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

↑ | Click to Return to Top

Patients Tab Explained:

Treatment Plan:

- Indicates if the Patient is scheduled for their active Treatment Plan.
- Click on the icon to view the Patient Summary page.
- Charges to the status of their Treatment Plan are made in the PMS.

On Plan
Off Plan
No Plan
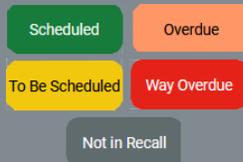
Recall:

- Indicates if the patient is scheduled for their next recall appointment.
- Click on this icon to go to the Patient Summary page.
- Changes to the status of their Recall are made in the PMS.

Scheduled **Overdue**
To Be Scheduled **Way Overdue**
Not in Recall

Insurance:

- Displays the logo of the Patients' Insurance Carrier.

Balance Alert:

- Indicates if the Patient has an outstanding balance.
- Click on the icon to view the Patient Summary page.

Benefits Check:

- Displays Real Time Benefit information such as Payor, Coverage Type, Coverage Dates, Deductible and Maximum for all Networks, and Coverage information.
- Click on the icon to view this information.

PMP Report:

- This feature is optional.
- Provides a direct link to your State's Prescription Drug Monitoring Program.
- Click on the icon to retrieve the Patients report without the need to log onto a separate website.
- If you are interested in this feature, please contact your Account Manager or email sales@icoreconnect.com

Send Rx:

- Click on the icon to write and transmit electronic prescriptions.
- Select the down arrow allows you to write the prescription in the same window or open in a new window.
- If you do not have this icon, please contact your Account Manager or email sales@icoreconnect.com

PMP button explained:

Prescription Monitoring Programs (PMP) track controlled substance activities among patients. Most states will provide a "Narx Score", to aid in the clinical decision-making process, and a list of all controlled substances prescribed by all providers.

Training on this feature and the PMP report are provided as part of the onboarding process.

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 percentage of revenue collected this year.

Click the header to sort the data or click on boxes on the right for more information.

iCoreVerify Tab:

iCoreVerify is our Automated Insurance Verification solution. Get benefits and eligibility verification for every patient on your schedule a full seven days in advance of their visit.

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.

Additionally, issues with the patient record such as an incorrect policy # are identified allowing the Practice to fix them well before the day of service.

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

iCoreVerify - Benefits Check

The icons inform the user if the system successfully generated real-time benefits check or if additional information is required.

What Does Each Color Mean?

Report Icon:
- Indicates Real Time Benefits Check was completed and coverage is valid.

Report Icon:
- Indicates verification was unable to match PayorID or PayorID is invalid.

IDCard:
- Represents the Patient's demographic information.

Insurance Card:
- Represents the Patient's Insurance information.

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

Using the Benefits Check Column:

It is recommended that a user log in daily to check the next seven days' schedule.

If the icons are all Green, the report was successfully retrieved. Click the Green icon to see the report.

If all icons are Blue, it indicates the PayorID is not recognized or invalid. Click on the Blue icon to manually select the PayorID.

Yellow means the data in your practice management software does not match what the insurance company has on file or there is missing information.

If icons are all yellow, that means there is missing or invalid patient/subscriber/payors info.

If the are Black, this indicates there may be technical issues or this is a cash paying patient.

Review the patient information in your practice management software to identify the error, make the correction and re-run the real-time benefits check.

Additional Icon colors and meanings:

Automated insurance verification check was successful and coverage is valid.

Automated insurance verification check was successful, but unable to determine insurance status.

Automated Insurance verification check was sucessful. However, you will need review to determine the status

Automated Insurance verification check was sucessful. However, coverage will expire before visit date.

Automated Insurance verification check was sucessful. However, coverage has expired.

Automated Insurance verification check was sucessful. However, coverage has expired and/or insurance has been set to invalid by Payor.

Automated Insurance verification check was sucessful. Unable to match PayorID or PayorID is invalid. Click the icon to manually pick the PayorID.

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.
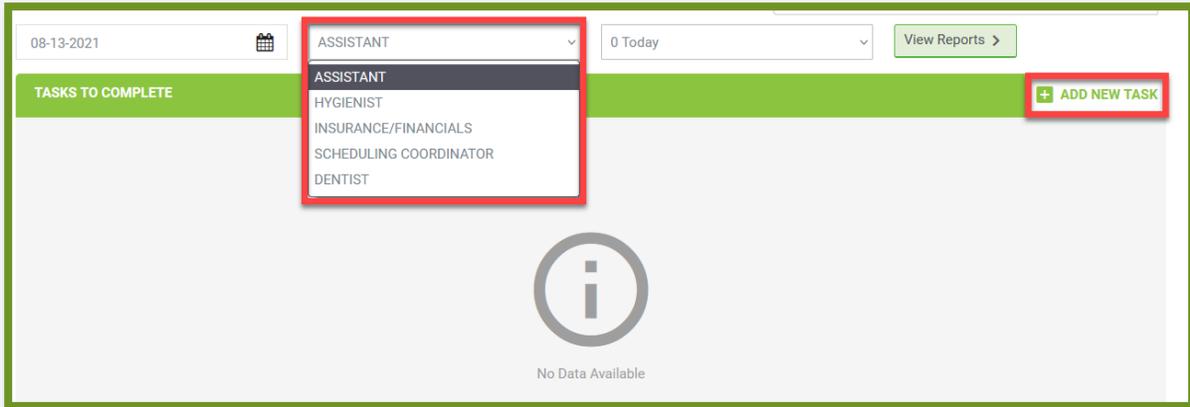
When Add a New Task is clicked on in the top right corner, it will display the option to create a new task, choose how often that task will be completed and choose who will be completing that task.
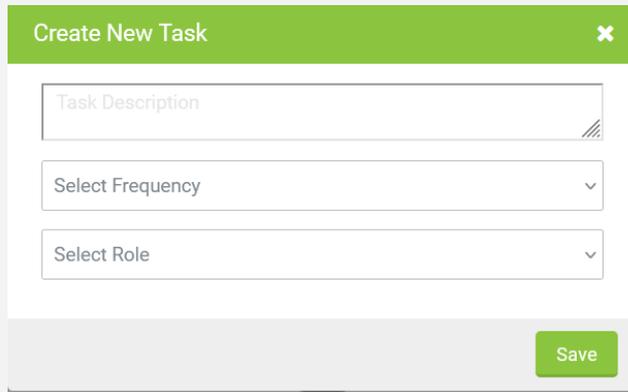
When 'View Report' is clicked on, it will present search criteria for the report you wish to view.

Click on [icon] the icon to view the report.
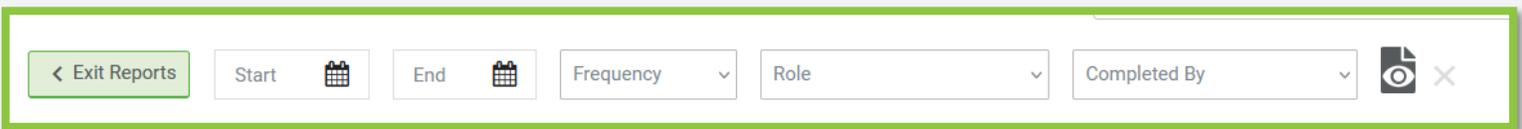
Targets Tab:

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.

MONTH-TO-DATE ADJ. PROD	
Enable Target	⬤
Practice Target Value	$85,000
	Update

SCHEDULED PROD. TODAY	
Enable Target	⬤
Set Target by:	⦿ Practice ◯ Providers
Practice Target Value	$5,000
	Update

SCHEDULED RECALL	
Enable Target	⬤
Practice Target Value	90%
	Update

NEW PATIENTS THIS MONTH	
Enable Target	⬤
Practice Target Value	25
	Update

Huddle Plus Tab Features:

Recent Patients:

Recent Patients will display the date the patient was seen, how much proposed revenue they would bring to 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.

	Last Name	First Name	Primary Provider	Walk-In Date	Proposed Revenue	
RECENT PATIENTS	RECALL	RESTORATIVE	BROKEN APPTS	AR	CUSTOM CALLS	CUSTOM DASHBOARD
☐	England	Lila	Jayce Hemmingway	Aug 18, 2021	$0.00	INS
☐	Hennings	Cynthia	Elgar Neena	Aug 18, 2021	$1,927.00	INS
☐	Iglesias	Gretchen	Elgar Neena	Aug 18, 2021	$0.00	INS
☐	Kasper	Kelly	N/A	Aug 18, 2021	$0.00	INS
☐	Palmieri	Alexis	N/A	Aug 18, 2021	$0.00	INS
☐	Quirrel	Ricky	N/A	Aug 18, 2021	$518.00	INS
☐	Reggiani	Jesse	Jayce Hemmingway	Aug 18, 2021	$1,041.00	🚫
☐	Yelman	Cynthia	Michael Bant	Aug 18, 2021	$0.00	INS
☐	Zoldak	Earl	Michael Bant	Aug 18, 2021	$1,951.00	INS
☐	Bunyan	Jesse	N/A	Aug 17, 2021	$0.00	INS

X | 10 ∨ | Scheduled Patients(168) | Search | « ‹ 1 2 3 4 › »

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.

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

10 ⌄	To Be Scheduled(225)	Search	« ‹ 1 2 3 4 › »

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

Restorative(420)   Search   « ‹ 1 2 3 4 › »

↑ | Click to Return to Top

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.

	RECENT PATIENTS	RECALL	RESTORATIVE	BROKEN APPTS	AR	CUSTOM CALLS	CUSTOM DASHBOARD	
	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

10 ⌄   Broken Appointments(165)   Search   « ‹ **1** 2 3 4 › »

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Rev07182023

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

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

X | 10 ⌄ | Accounts Receivable(65) | Search | « ‹ **1** 2 3 4 › »

↑ | Click to Return to Top

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 › » |

Rev07182023

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.

New Custom Bucket   ✖

Bucket Name *

Upcoming Revenue   Max

limit 20 Characters

Columns *

Proposed Revenue

Max limit 6 columns

Patient Criteria   ⊕

| Has (Between)	Next Sch. Appt	& Next Sch. Appt	
Next Sch. Appt	08/18/2021	09/04/2021	⋮

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.
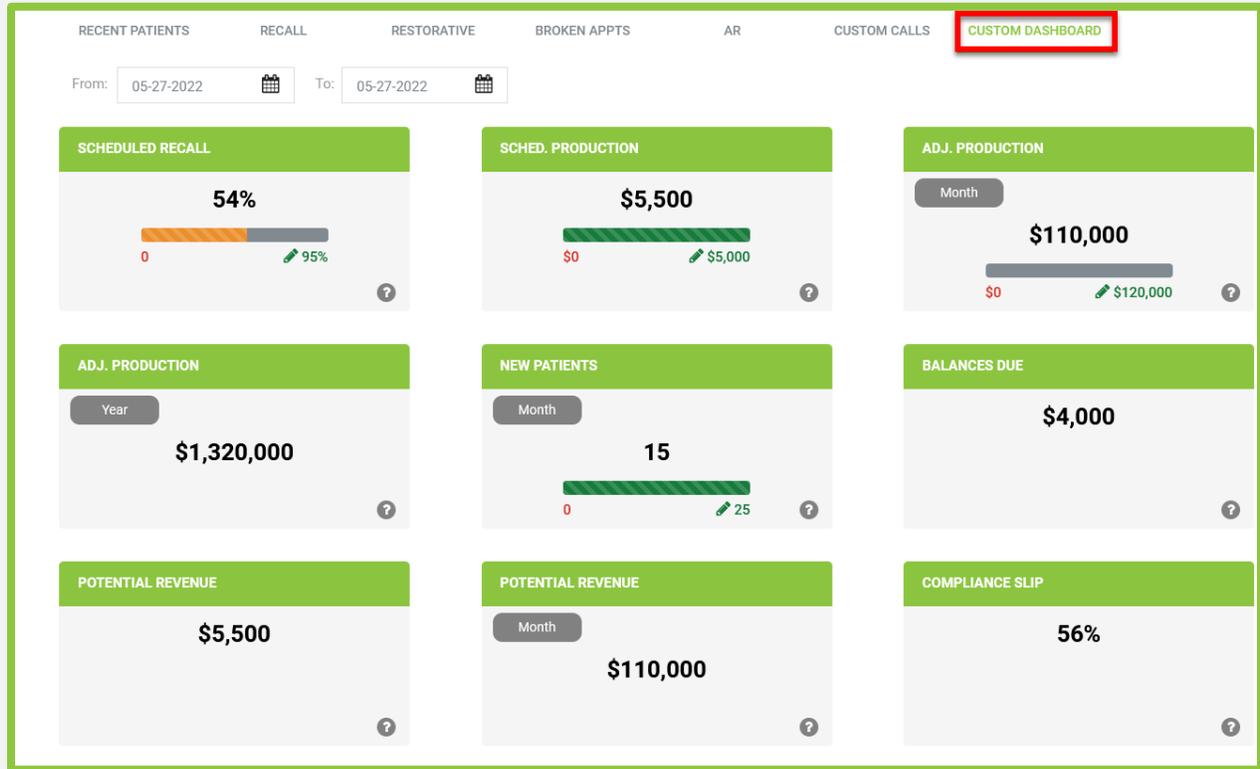
Practice Metrics:

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.

Generate New Report

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

↑ | Click to Return to Top
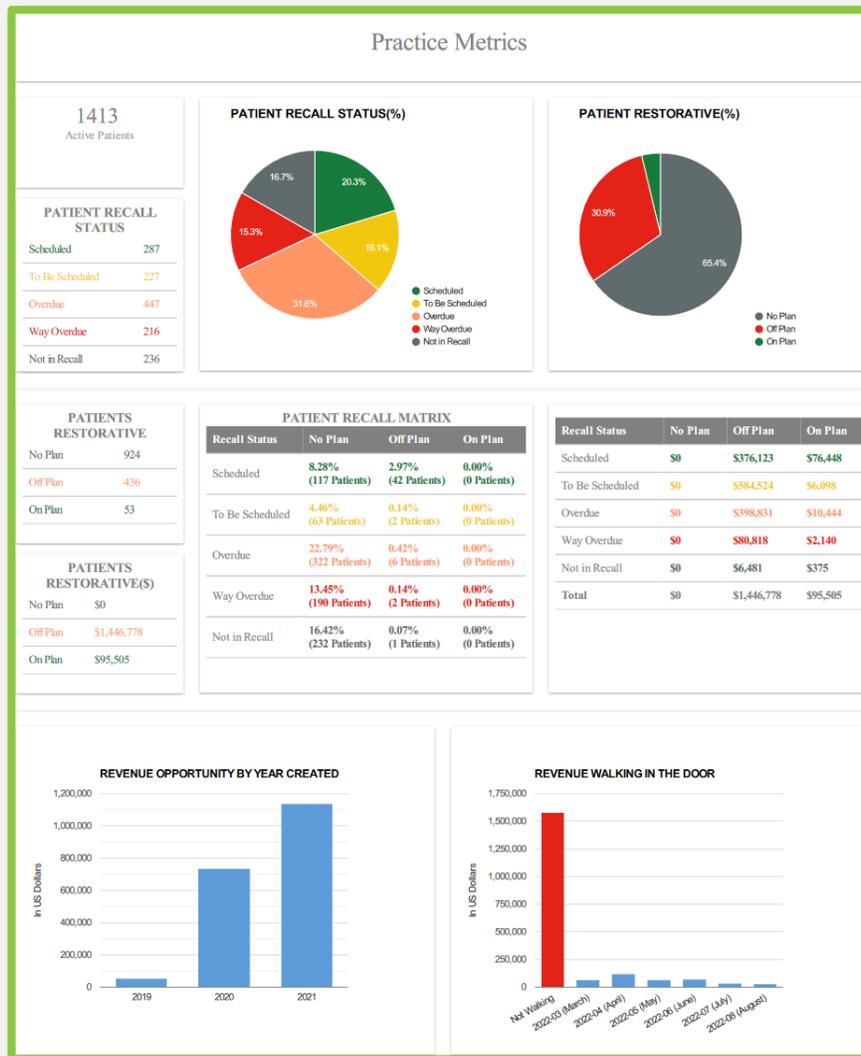
Thank you for reading.

If you require further assistance, feel free to call 888.810.7706. Our U.S.-based support team is here to help you 8am-9pm Eastern time Monday through Friday.