

June 17 - System Analytics and Monitoring Trends

This video covers recent software updates for Juvonno and demonstrates how to track clinic statistics using Excel to identify trends.

The speaker detailed several recent improvements to the platform:

- **Recurring Invoices:** A quarterly option (every 3 months) is now available, along with the ability to set an end date for temporary invoices.
- **Practitioner Reports:** Accounts receivable (AR) reports are now specific to the logged-in user, allowing practitioners to pull data only for themselves to improve accountability.

Feature Title: Recurring Invoices Expansion

Problem Solved

Previously, users lacking the subscription module could not automatically generate temporary or quarterly-interval recurring invoices, requiring manual tracking and processing.

Core Functionality

A new **Quarterly** billing interval option has been added to the core recurring invoices engine. Invoices are generated every three months based relative to the specific start date of the invoice (e.g., if initialized on June 29, the next invoice triggers in September), rather than defaulting to traditional calendar quarters. Additionally, an **End Date** constraint can now be configured to handle fixed-duration payment plans automatically.

Technical Implementation / Config

- **Prerequisites:** This feature is natively constrained to the standard recurring invoice module and does not currently sync with the Subscription module.
- **UI Path:** Create New Recurring Invoice -> Set Interval to Quarterly (Every 3 Months) -> Define End Date.

Feature Title: Role-Based Access Control (RBAC) & Provider-Scoped Reporting

Problem Solved

Clinics needed a method to allow practitioners to access critical performance metrics and Accounts Receivable (AR) details without exposing private clinic-wide or peer data.

Core Functionality

The platform enforces role-scoped data isolation across key reporting modules. When a practitioner logs in, the system automatically applies a `logged_in_user` restriction query. While UI dropdowns may display lists of other providers, executing queries for any user identity other than the active session will throw an authorization exception/rejection.

Technical Implementation / Config

The data restriction scope now explicitly includes:

- Payments by Practitioner
- Sales for Specific Practitioner
- Sales by Practitioner
- Practitioner-specific Accounts Receivable (AR) reports

Feature Title: Schedule UI Filters for Charting Status & Inactive Practitioners

Problem Solved

Schedulers and administrators required a rapid visual method to audit chart completion and seamlessly handle off-schedule/override booking requests for unmapped or former practitioners.

Core Functionality

Two new toggle states have been injected into the main calendar dashboard filter array:

- **Charting Status Audit:** Maps color-coded indicators directly to appointments:
 - *White:* No chart initiated.
 - **Green:** Chart initiated/in progress.
 - **Orange + Lock Icon:** Chart finalized and locked.

- **Inactive Practitioners Toggle:** Exposes unmapped or off-schedule provider lanes. This lets staff bypass calendar overrides to quickly book custom requests or manage slots for departed providers.

Feature Title: Invoice Metadata Origin Update for Programs

Problem Solved

Multi-location clinics running specialized programs faced cross-billing issues because program invoices pulled geographic metadata from global corporate details rather than site-specific locations.

Core Functionality

The system's invoice rendering pipeline has been rewritten for the program module. Document variables now query and inherit metadata contextually from **Clinic Location Details** instead of **Company Details**.

Feature Title: Schema Mapping Persistence for Chart Templates

Problem Solved

Historically, making minor structural or typographical edits to an active chart template broke the database mapping relationship, causing the "Copy from Last Chart" feature to fail and rendering data non-transferable.

Core Functionality

The application now supports dynamic schema reconciliation when executing the `Copy from Last Chart` function. Minor edits (such as text modifications, typo fixes, or element reordering) no longer invalidate historical data-carrying arrays.

Caveats & Limitations

This dynamic mapping persistence applies **only** to chart instances built using the platform's **New Chart Builder**. Legacy engine charts or system-base templates do not inherit this compatibility and will still fail if modified.

Missing Technical Detail

The speaker referenced a future update regarding Ontario HCAI (Health Claims for Auto Insurance) integration reporting workflow changes scheduled for release on June 29, but did not explain specific technical implementation steps or interface changes.

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