

CARESTACK

**Enterprise software for
dental practice management**



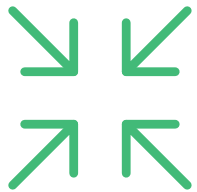
Built for large DSO operations and growing group practices.

CareStack™ is purpose built for large DSO operations and growing dental group practices to increase practice efficiency, minimize operational costs, grow patient base and improve dental care.



Purpose built to maximize efficiency

Maximize efficiency by **centralizing control, streamlining operations and automating tasks**



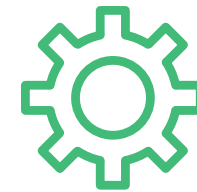
Centralize control

Monitor and manage all the operations across sites through a central console.



Streamline operations

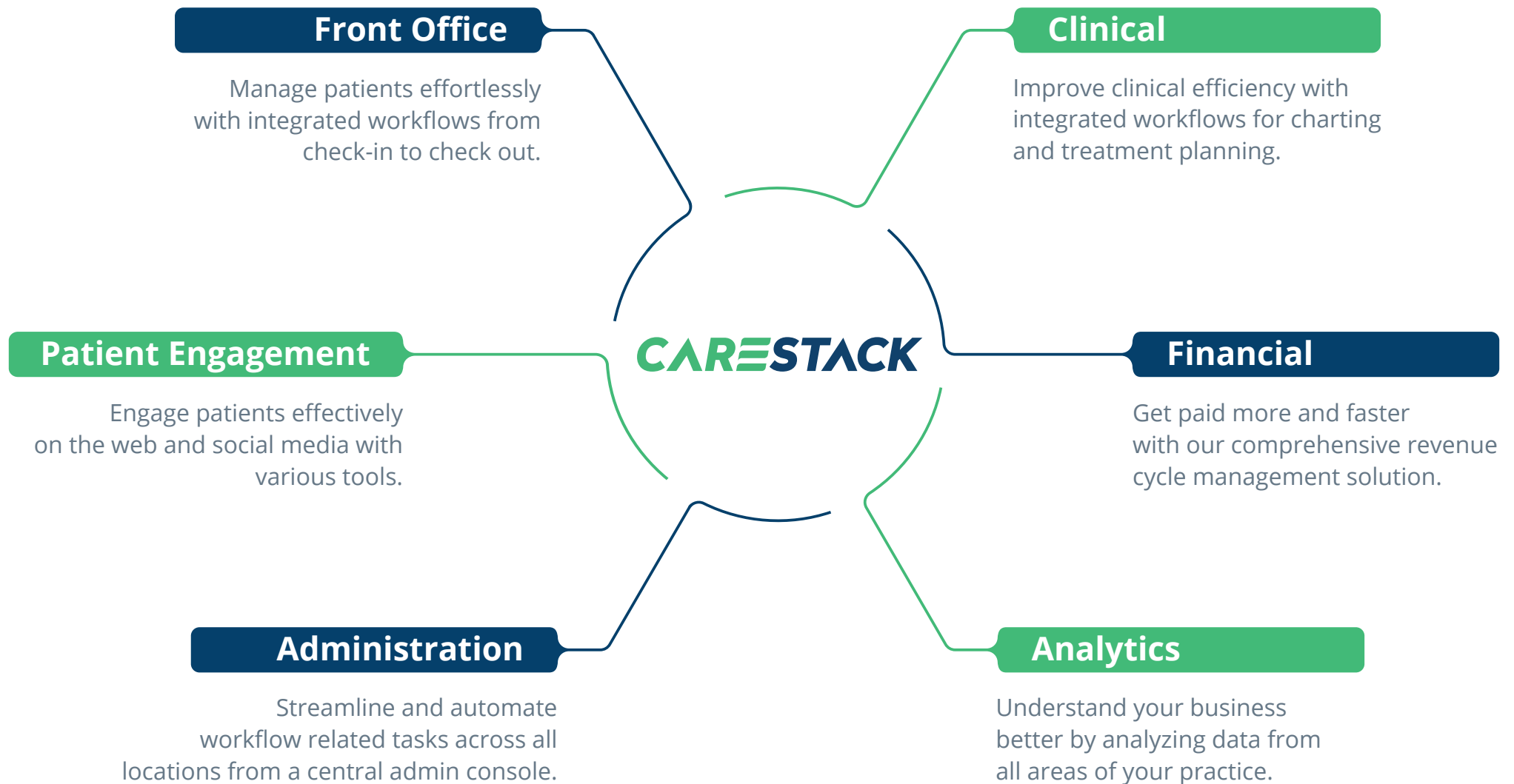
Standardize administrative, clinical and financial workflows across locations.



Automate tasks

Perform tasks automatically based on the settings for workflow automation.

Integrated modules



Front office management

The screenshot displays the CARESTACK interface for searching appointment slots. The top navigation bar includes the CARESTACK logo, a search bar, a user profile icon, and a menu. The main content area is titled "Search appointment slots for a patient account" and is divided into several sections:

- Selected Account Info:** Lists account members (BENET, DANNETTE; POWELL, TRENT) and upcoming appointments (BENET, DANNETTE; MALL / HIF95D / D-NP Exam Priv... on 10 August 2017, Thu at 10:00 AM (1h)).
- Set Appointment Criteria:** Includes Appointment Type (Single, Concurrent, Consecutive), Appointment Duration (00h, 10m), and Time of Day (All Day, Morning, Afternoon).
- Select Filter Criteria:** Features Favorites and Filters tabs, a search bar, and a list of locations and providers with checkboxes for selection.
- Set Date Range:** Offers Presets (Earliest, Next Week, After 2 Weeks, After 3 Weeks, Next Month, After 3 Months, After 6 Months) and a Day of Week selector (All Working Days, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday).
- Summary:** Displays search parameters such as Search Type (Single), Locations (All), Providers (All), Production Type (All), Date Range (Earliest), Days of Week (All Working Days), Duration (00h 10m), Time of Day (All Day), and Selected Dates (04 Aug 2017, 06 Aug 2017).

At the bottom of the interface, a calendar grid shows appointment slots for various providers and locations, with some slots marked as "Blocked" (MAM12H) or "Rescheduled" (Resch.).

Multi-site scheduling

View and schedule for all providers and locations from a central site

Find open time slots

Search for open time slots using a variety of criteria and preset rules

Call lists and reschedule queue

Maintain call lists for ASAP patients, unscheduled treatments and recalls

“With fast and easy scheduling, our staff productivity has increased and we have more time for our patients.”

- Melissa, Practice Administrator

Clinical management

The screenshot displays the CARESTACK interface for patient HULME, DAWSON. The main area shows a dental chart with 32 teeth, each with a corresponding icon indicating its status (e.g., decay, restoration). A sidebar on the left contains navigation options like 'Chart', 'Treatment Planning', and 'Perio Chart'. Below the chart, a table lists treatment plans, including 'Ortho Plan' and 'Deleted Treatment Plan'. The table columns include Date, Description, Tooth / AOC, Surface, Provider, Fee, and Status.

Date	Description	Tooth / AOC	Surface	Provider	Fee	Status
	Ortho Plan					
	Deleted Treatment Plan					
	D2150 Amalgam Iwo Surface	17	MI			Existin
	D2160 Amalgam Three Surf	7	MID			Existin
04/04/2012	D8070 Comprehensive Trans Dentition	-		MAH57D	\$201.00	Compl
04/04/2012	D8070 Comprehensive Trans Dentition	-		MAH57D	\$450.00	Compl
	Comprehensive					

Advanced care notes

Easily capture clinical notes using pre-defined templates mapped to procedure codes

Integrated treatment planner

Create chair-side charts, treatment plans and access clinical images from a single interface

Advanced periodontal charting

Perform a full periodontal exam and engage patients with easy to interpret visualizations

“Treatment planning is well integrated and simple, making my patient engagement very productive.”

- Jackie, Treatment coordinator

Finance management

Insurance Payments		Electronic Remittance Advice	Capitation
07/24/2017 Total no. of Patients : 2	Pending Posting	Carrier : SECURITY LIFE INSURAN... Carrier ICN : CDCA1 Carrier ID : CDCA1 Date : 07/24/2017	ERA Amount : \$624.00 Payment Type : CHK Account # : Routing # :
07/24/2017 Total no. of Patients : 1	Pending Posting	CLAIM #133629 / DACUS, DEBORAH (9056800) / Amount : \$108.00	Status : Automated Posting
FEDERAL SERVICES 07/24/2017 Total no. of Patients : 6	Pending Posting	CLAIM #133629 / DACUS, DEBORAH (9056800) / Amount : \$108.00	Status : Automated Posting
AETNA 07/28/2017 Total no. of Patients : 1	Pending Posting	CLAIM #129852 / WALKER, ELIZABETH (3103661) / Amount : \$156.00	Status : Manual Posting
DENTAL BENEFIT PROVIDERS INC 07/25/2017 Total no. of Patients : 3	Pending Posting	CLAIM #133613 / KILMER, SUSAN (10013275) / Amount : \$148.00	Status : Automated Posting
UNITED HEALTHCARE SERVICES INC 07/25/2017 Total no. of Patients : 1	Pending Posting	CLAIM #133613 / KILMER, SUSAN (10013275) / Amount : \$148.00	Status : Automated Posting
UNITEDHEALTHCARE INSURANCE CO 07/25/2017 Total no. of Patients : 7	Pending Posting	CLAIM #133613 / KILMER, SUSAN (10013275) / Amount : \$148.00	Status : Automated Posting
		CLAIM #130921 / WALKER, ELIZABETH (3103661) / Amount : \$312.00	Status : Automated Posting
		CLAIM #130921 / WALKER, ELIZABETH (3103661) / Amount : \$312.00	Status : Automated Posting
		CLAIM # / STOLTZ STOLTZ / Amount : \$208.00	Status : Automated Posting
		CLAIM # / STOLTZ STOLTZ / Amount : \$208.00	Status : Automated Posting

Code	Description
PR3	Copayment amount.
PR3	Copayment amount.

Centralize billing and accounting

Centralize control and streamline financial operations across all locations

Automated ERA posting

Set up posting rules and auto-post ERAs with minimal manual intervention for exceptions

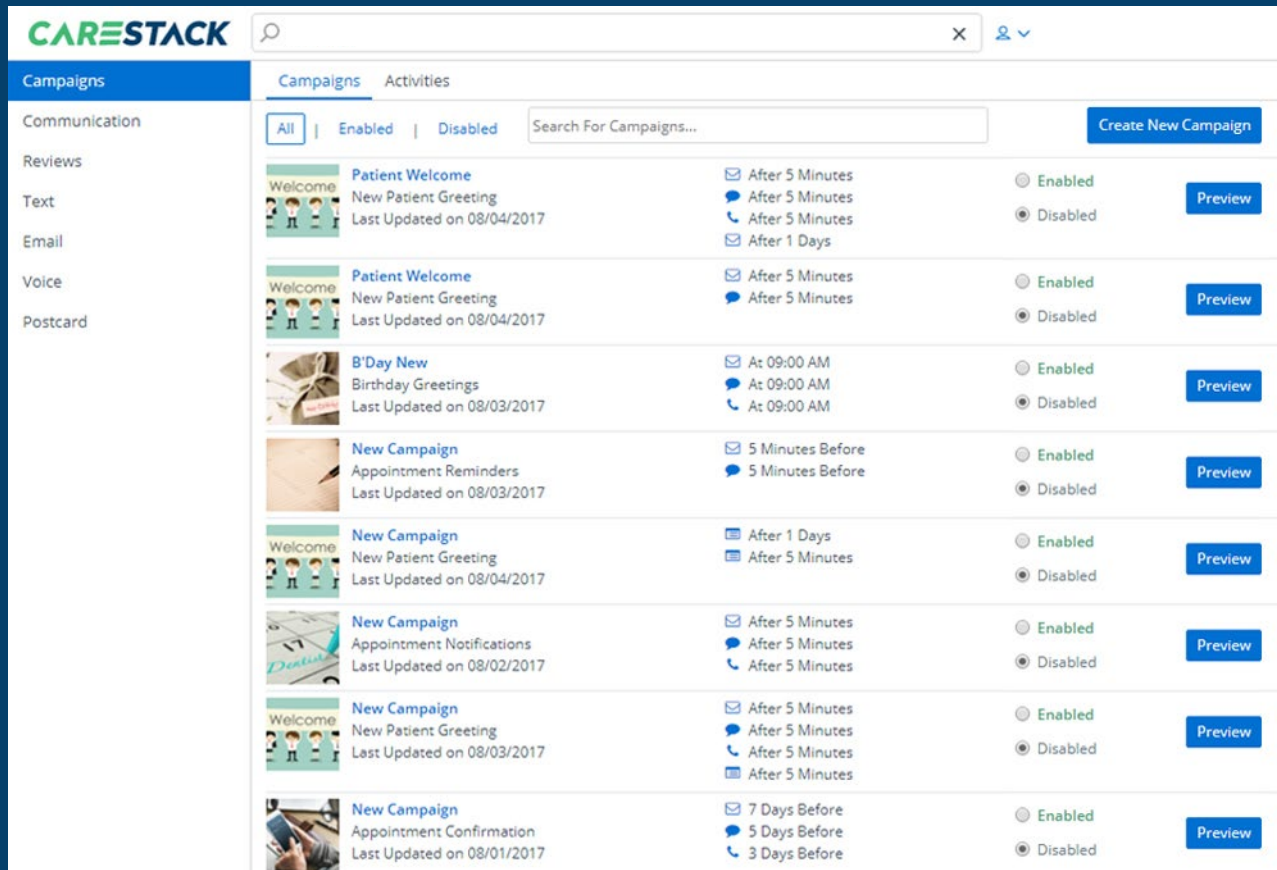
Centralize financial reporting

Aggregate financial data from multiple locations and generate custom reports

“My cashflows have increased due to faster insurance processing and better predictability.”

- Gloria Fernandez, CFO

Patient relationship management



Automated digital campaigns

Run campaigns that drive better patient engagement to increase new patients

Patient communications

Automatically engage patients using two way communication via email, text and voice

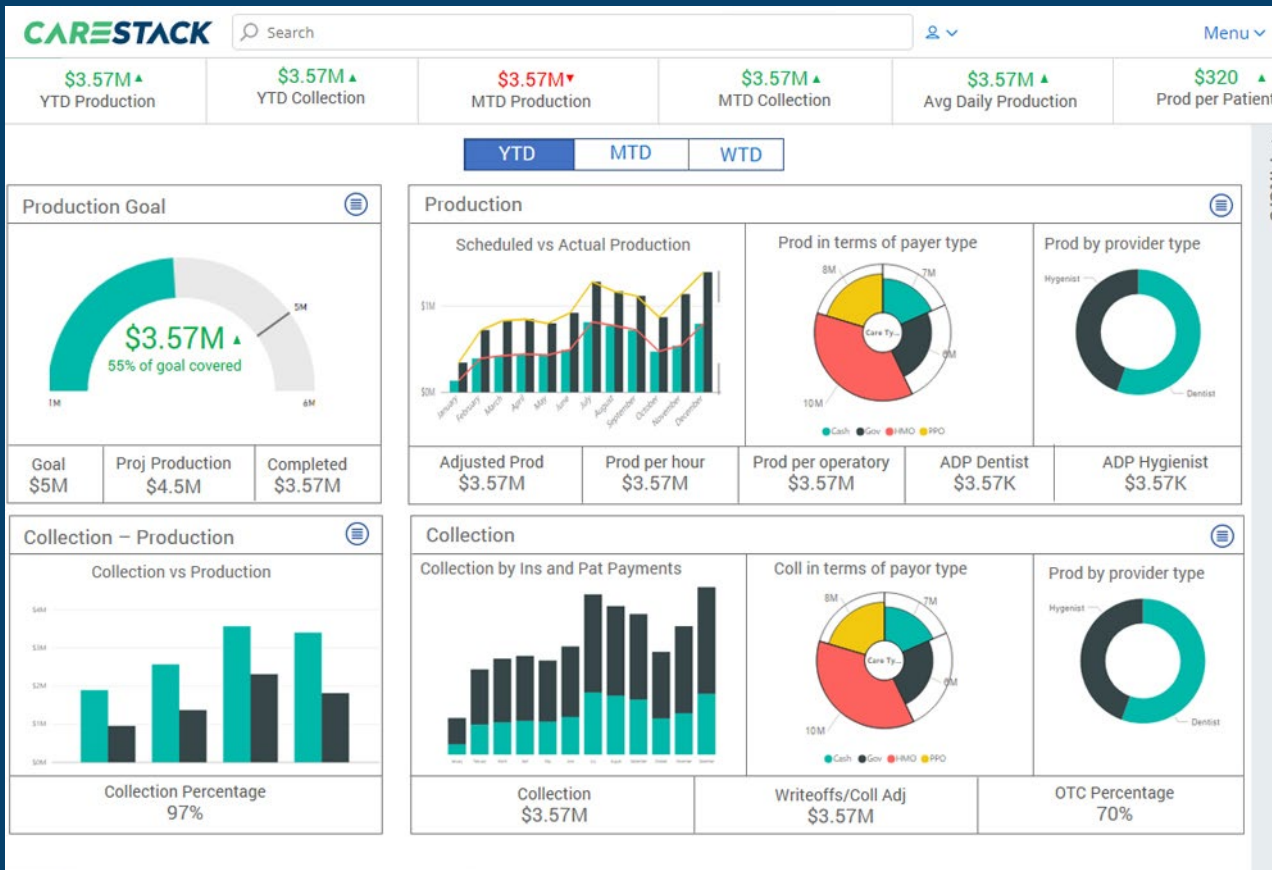
Reputation management

Build a great online reputation by tracking patient reviews across web and social media

“Automated promotional campaigns have resulted in better patient reactivation.”

- Martha, Practice administrator

Analytics and business intelligence



Role based dashboards

Customize role based dashboards to allow data driven decision making at all levels

Active business intelligence

Quickly identify areas of business opportunities within the practice using rules and KPIs

Profitability and fee analysis

Assess procedural profitability and adjust fees accordingly to drive profits

“Finally I have real-time insights on all areas of my practice. No one does it like CareStack.”

- Mark D Huzyak, Practice owner

Administration

The screenshot displays the CareStack Administration interface for 'Celebration Dental Group (10001)'. The main view shows a table of locations with columns for 'Short Name' and 'Name'. An 'Update Location' modal window is open, showing details for a location with Short Name 'WELL' and Name 'Celebration Dental-Wellness Center'. The modal includes sections for 'Location Details' and 'Contact Details'.

Short Name	Name
WELL	Celebration Dental-Wellness Center
SN_2	Florida Hospital South
SN_2	Florida Hospital South

Location Details	
Short Name	: WELL
Name	: Celebration Dental-Wellness Center
Assigned Users	: King, April;Perez, Bea;Acosta, Carol;Ansley, Claire;Brigode, Carolyn;De Lorenzo, Connie more

Contact Details	
Address	: 2940 Mallory Cir Ste 101 Celebration, FL - 34747-0000
Time Zone	: Eastern Standard Time
Phone 1	: (407) 566-2222
Phone 2	: (407) 566-2224
Fax	:
Email	:

Multi location management

Add, remove, manage or deactivate locations, users and providers from a central console

Data security and access controls

Add users, edit their permissions and audit their activity from the admin console

Task automation

Automate tasks related to clinical, financial, patient engagement and business management

“Shifting to CareStack allowed me to have better control and reporting on all our locations.”

- Scott Hughes, Operations manager

Features by modules

Administration

- Multi location
- Multi specialty
- Access controls & audits
- Business management
- Rule manager
- Workflow manager

Front desk

- Multi location scheduling
- Customizable calendars
- Patient onboarding
- Insurance eligibility
- Document management
- E-signatures

Clinical

- Customizable palettes
- Restorative & perio charting
- Care notes with decision support
- Treatment planning
- E-prescriptions
- Custom mobile app

Financial

- Central insurance management
- Central billing & accounting
- Automated ERA posting
- Patient payments
- Billing rule engine
- Financial reporting

Patient engagement

- Online check-in
- Patient portal
- Referral management
- 2-way patient communication
- Recalls and reactivation
- Patient education

Reporting & Analytics

- Centralized reporting
- Auto report generation
- Custom reporting
- Personalized dashboards
- KPI's and drill downs
- Leaderboards

Marketing automation

- Rule-based digital campaigns
- Online scheduling
- Reputation management
- Newsletters
- Integrated social media
- Patient reviews

Integrations

- Digital imaging
- Online scheduling portals
- Payers & clearing houses
- Patient marketing softwares
- Collection agency systems
- Accounting softwares

For more queries reach out to us at

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