

5.30 Release Features

CareStack 5.30 welcomes you to an impressive array of exciting new features, renovated workflows, and tiny changes with big impacts that stretch across the software. Whether you spend your time scheduling, chasing insurance payments, or researching fees, there is always a new feature for you.

We have implemented for you feature requests that will render a significant impact on your workflow efficiency be it while managing time clock entries or lab cases. To name a few the additional benefits offered to you would include the ability to effortlessly create recurring blocks, manage patients requests for online appointment booking via streamlined messages for its users, optimize your daily scheduling besides tapping into our all new Procedures Completed KPI.

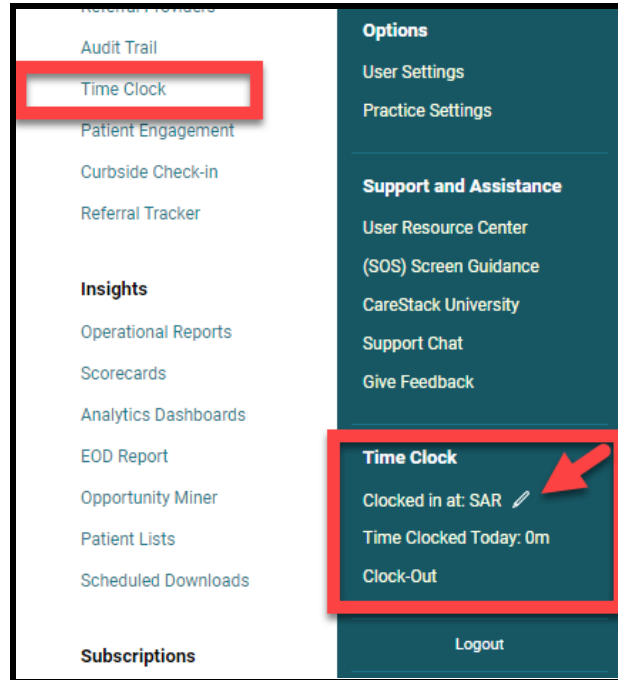
Front Desk

1) Time Clock Entries

- a) CareStack has made life easier for **Time Clock Entries**: Ability to Edit the Clock In location, delete a Clock In, and View Clock In details by Day, Week, or Custom Dates. You will have a location summary to show the amount of working hours completed.
 - i) Time Clock: Eases the amount of time that goes into making changes for provider Clock In error or miss.
 - ii) Tracking of hours and locations.

View Detail in Day, Week and Custom Format

Location	Clock-In	Clock-Out	Duration
Sartell	01:00 PM		0m
Sartell	06:15 AM	12:00 PM	5h 45m



2) Recurring Blocks

Carestack has updated the **Recurring Blocks** for you to enhance your schedule blocking experience and workflow.

- a) It allows you to create a single block or a recurring block. When you are creating a recurring block you have the ability to repeat this daily, weekly, or every month and select specific days of the week for the schedule.

The screenshot shows the 'Block Slot' form in CareStack. The form is titled 'Block Slot | MALL L | endo_test3 | January 23, 2023, Mon'. The fields are as follows:

- Time: 05:00 AM - 06:40 AM
- Duration: 1 hrs 40 mins
- Provider: [Empty]
- Operator: endo_test3
- Block Color: [Empty]
- Recurrence Mode: One Time, Daily, Weekly, Monthly (selected)
- Days of Week: S, M (checked), T, W, Th (checked), F, S
- Applicable on Every: 1, 2, 3, 4 (checked), 5 Week(s)
- Date: 01/23/2023 to 01/23/2023
- Block Note: [Empty]
- Download Error Log: [Checked]

At the bottom, there is a message: 'Blocking a recurring slot may take several minutes depending on the criteria specified'. The form has 'Cancel' and 'Block Slot' buttons.

- b) We like to create recurring blocks but then realize we may not need it for a specific date and time; no worries, you can unblock, add, and edit at your convenience.

- c) We have created a Schedule Log to track slots that could not be booked as part of the recurring block to reflect and allow you to make actionable changes where needed. Each row of the log represents one set of recurring blocks. Click **Download** to see the blocks that were unable to be placed because of conflicts. Hierarchy will always be appointments and the first block created.
- d) Recurring blocks are permission based for add/edit and delete.

Scheduler Reports						
Report	Location	Scheduled by	Scheduled At	Status	Actioned by	Action
	41 Selected			2 Selected	Select	
Recurring blocks conflict log	SAR	Yogerst, Jac		Pending		Mark as Done Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jac		Pending		Mark as Done Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jac		Done	Yogerst, Jackie	Mark as Pending Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jac		Done	Yogerst, Jackie	Mark as Pending Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jac		Pending		Mark as Done Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jackie	9:48 AM, 01/23/2023	Pending		Mark as Done Download Delete
Recurring blocks conflict log	SAR	Yogerst, Jackie	9:48 AM, 01/23/2023	Pending		Mark as Done Download Delete

3) Scheduler Settings

- a) There is an i icon helper text to understand what eligibility check period does. You will find it inside the **Practice settings > Scheduler > Scheduler Settings > Eligibility**.
 - i) Set the requirement for when a patient's eligibility for a plan should be checked. Appointment blocks are colored **red** when a check is needed and **green** when the check has been performed within the required time.
- b) When selecting **Eligibility Check Period** as **Custom Period**, you will see the subsequent field text **Reworded** from: 'Last Eligibility Date Older than' to 'Require Eligibility Check After' in which you can select your custom date.
- c) The new customization for **Checking Insurance Eligibility** within **Scheduler Settings** will allow you to select the **Eligibility Check Period** for a Custom Period, Monthly, Calendar Year, or Fiscal Year.

Scheduler Settings

General Settings

Default Slot Duration (in mins)
Enable Cancelling Reason
When booking appointments, use
When blocking appointment slots, show

Eligibility Settings

Eligibility Check Period ⓘ
Require Eligibility Check After *

Customization of Scheduler Views

Patient HIPAA Eligibility Claim Custom

Appointment Block Color Settings

Appointment Slot Color : Insurance Eligibility Status
Appointment Left Margin Color : Production Type
Appointment Border Color : Appointment Status Group

Drag an Element to the preview to customize the Scheduler block

Eligibility Settings

Eligibility Check Period ⓘ
Require Eligibility Check After



- d) When you are selecting a **Custom Period** you will be prompted to **select the amount of days** for the **Require Eligibility Check After** field: There will be an **i icon** to hover over in the Eligibility Check Period which will offer detailed information regarding the reflection of its setting on the schedule.

4) No Show/Cancellation Module

- a) Newly added feature inside the **No Show/Cancellation module** offers the ability to add a code with an editable fee and complete the **Cancel/No Show** all in one swift action. When a patient calls and I need to Cancel/No Show the appointment, I can select a code from a dropdown menu in the cancellation module to add a No Show/Cancellation fee where I can adjust the fee manually. When I have completed, cancel/save the appointment details, it will complete the code and push the charges to the patient's ledger.
- i) I am able to reschedule a No Show/ Canceled Appointment from the **Patient > Appointments** page.
 - ii) I am able to set a **No Show Fee** in **Practice Settings**.
 - iii) I am able to see the number of previous Cancellations and No Shows of a patient.
 - iv) I am able to change the Provider and Fee for Cancellation Codes from the cancellation grid.
 - v) I am able to delete the Cancellation Code from the cancellation grid.

Dr. Payne SAR | January 23 2023, Mon

23 Jan 2023 | 08:00 AM-09:30 AM (1h 30m)
SAR | PAYNE
I Crown

McGuire Sparky (10033621)
11/26/2000 (22Y, M)
INS.H PAT RP
M: (320) 493-9654 E: jyogerst@carestack.com

Previous Cancellations by Patient: 0
Previous Cancellations by Practice: 0
Previous No Shows: 0

Linked Procedures ☒ Retain the selected codes in appointment

Code	Th/Area	Surface	Provider	Fee	Status
☒ D2750 - Crown Por...	31		PAYNE	\$804.00	Recommended

Cancellation Details [+ Add Code](#)

Code	B.O	Provider	Fee	Actions
Select a Code D9987 - Cancelled Appointment D9986 - Missed Appointment D9987.1 - NO SHOW fee		Select Provider		Remove Save

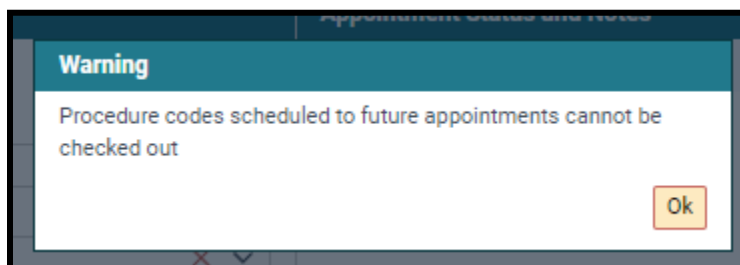
Cancellation Details [+ Add Code](#)

Code	B.O	Provider	Fee	Actions
D9987 - Cancelled Appointment	N	FIGUER	\$25.00	Delete

5) Schedule Updates

- a) We are bringing in the function to **print your schedule** in the Order of the Operatory replicating the view in the Scheduler of columns to help with visual continuity.

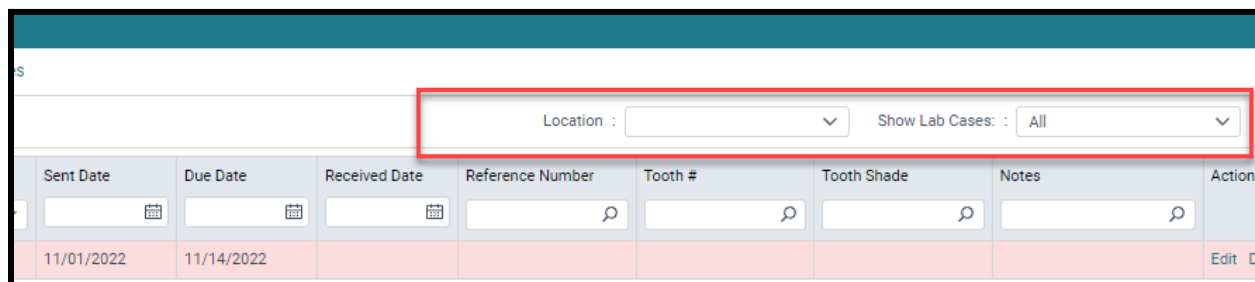
- b) We have enhanced the creation of a **block in an operatory** to default to the operatory provider. This will save you time selecting the provider.
Note: You will no longer have the option to check out a future appointment.
- c) Update for **Future Appointments check out**: If a patient is scheduled for a future date, Carestack will not allow you to check out the patient until the appointment date.



Clinical

1) Lab Cases

- a) Exciting updates for the **Lab Cases**: As a user creating a lab case, it can be selected for a future date. For example, if you complete a case on Monday but the lab comes on Thursday, you can select the Sent Date as Thursday. The update for the Lab Case Location filter has changed and will not be pre-populated in the slideout when navigating from the Patient Overview.
 - i) Ability to Choose **Sent Date** As a Future Date In Lab Cases
 - ii) Lab Cases '**Location filter shall not be pre-populated in the lab case slideout when navigated from Patient Overview**'.



Patient Engagement/Patient Services

1) Medical Alerts

- a) Ability to add Medical alerts manually from the Med Alerts tab. This feature prevents the need to create a new Med Hx form to make changes to the Allergies and Conditions.



Edit Conditions & Allergies

Conditions

+ abc

+ ABC TEST

+ Add Alert 9

+ Arthritis

+ Asthma

+ Back Pain

+ Bad Temper

+ Bisphosphonates

+ Bronchitis

+ Chest Pain Upon E...

+ Cold

+ Covid

+ Covid 22

+ Diabetes

+ Dialysis

+ Does this work?

+ eeee

+ Emphysema

+ Eng_asthma

+ Fainting Spells

+ Fear of blood

+ fever

+ Fever 20

+ Fever1

+ Heart Issues

+ High Blood Pressure

+ Hives / Skin Rash

+ Insomnia

+ JMJ

+ Low Blood Pressure

+ Medications

+ Meningitis

+ Persistent Diarrhea

+ phobia

+ Pre-Med

+ Premedicate

+ Rinus

+ Sexually Transmitt...

+ Shortness of Breath

+ Sinus Trouble

+ skin test

+ Sleeplessness

+ substance abuse

+ SWELLING

+ Test Alert

+ Test Condition - Di...

+ Thyroid Problems

+ Tuberculosis

+ Twisted Tongue1

+ Unusual Weight Lo...

Allergies

+ 123

+ abc1

+ Abcd

+ Add Alert 0

+ Alert Alert

+ Allergies 6

+ Allergy Just for test

+ Allergy to Aspirin

+ Allergy to Barbitur...

+ Allergy to Codeine...

+ allergy to dust

+ Allergy to Erythro...

+ Allergy to Iodine

+ Allergy to Latex/R...

+ Allergy to Local An...

+ Allergy to Metals

+ Allergy to NSAID

+ Allergy to Penicillin

+ Allergy to Sulfa

+ Another Alert

+ asd

+ Blue

+ dsfd

+ Dust

+ Dusts

+ em

+ emglsh

+ eng1

+ english

+ English1

+ english1111

+ english23

+ english4

+ Environmental Alle...

+ Epinephrine Adver...

+ err

+ Fevrrr

+ hhhhhhhhhh kkkkk...

+ HOla

+ jhgf

+ Medical Alert

+ Medical Condition

+ New alert

+ New allergy 21

+ New allergy 22

+ Nidhin test

+ note

+ Penicillin

+ Projector Allergy

+ random

+ rinu

+ roaches

+ smyaaaa

+ soap

+ spanish

+ Spanish test

+ Test Allergy

+ Test New

+ Test New Form 123

+ TESTTTTT

+ Tomato

+ uuu

+ west

+ xyz

Active Conditions (0)

No Conditions Added

Active Allergies (3)

Allergy to Aspirin

Allergy to Local An...

Allergy to Sulfa

2) Global Search

- When searching for a patient using the Global Search, the 'Include Inactive Patient' checkbox will remain unchecked by default.
- Users can now search patients by their email address.

+ Patient

+ Alert

+ Form

+ Presc.

+ Memo

+ Lab

+ Recall

+ Message

+ Print

Showing Search Results for jorge

Patient Details	Contact Details	Location	Flags
	DBA-Cross Creek Dental, 1199 Old Lorena Rd Lorena, TX 76655-3176, Newton Falls, AK, 44444-4444, Mob: Email: jorge@carestack.com	Celebration Dental - Mallory Circle L	PAT
Add Appt. Overview Payment Claims Forms Documents Chart Tx Plan Perio Ledger Appointments Insurance			
	DBA-Cross Creek Dental, 1199 Old Lorena Rd Lorena, TX 76655-3176, Newton Falls, AK, 44444-4444, Mob: (Email: jorge@carestack.com	Cent 2 dental	PAT
Add Appt. Overview Payment Claims Forms Documents Chart Tx Plan Perio Ledger Appointments Insurance			
McGuire, Sparky (10033621) DOB: 11/26/2000		Sartell	PAT, INS.H, RP
	Email: jorge@carestack.com		

☐ Include inactive patients

- Users can view a patient's SSN (last 4 digits) in search results.

d) Minor UI Changes to the Global Search dropdown

3) Patient Connect

a) The dropdown for provider, referral provider, appointment and witness signatures inside Patient Connect (office mode) would have a 'Search' tab. These dropdowns would also list the items in alphabetical order.

4) Online Appointments

a) A more clear text in the follow-up steps for patients to complete appointment requests and direct booking (applies to both new and existing patients).

Appointment Confirmed!

You have successfully booked your appointment. Please check your email for more details. For virtual appointments, you will receive a separate email with the meeting details.

APPOINTMENT DETAILS:

APPOINTMENT & LOCATION	PROVIDER	PATIENT NAME	REASON
Thursday, 09 Feb 2023, 09:00 AM - 09:15 AM (EST) Celebration Dental - Mallory Circle L	Pantzoulas, DMD, Spiro J. (DMD)		Checkup

You will receive a confirmation email with the following details:

- ✓ Access to our comprehensive [Patient Portal](#) where you can find all your appointments and treatment details.
- ✓ For virtual appointments, an email with a video conference link to consult your doctor.
- ✓ To reduce appointment delays and paperwork hassles, please complete your onboarding documents through our Patient Portal.

[COMPLETE FORM](#)

- b) The confirmation email for the appointment booked online will reflect a summary list of all the appointments booked.

Appointment Confirmed!

Hi ,

You have successfully booked your appointment with
Celebration Dental B - Celebration Dental - Mallory Circle L.

Appointment Details:

Appointment

Patient Name :

Date & Time : Thursday, 09 February 2023;
09:00 AM - 09:15 AM

Reason : Checkup

Provider :

Address : Celebration Dental - Mallory Circle

To reduce appointment delays and paperwork hassles,
please complete your onboarding documents through our
[Patient Portal](#).

Best Regards,

- c) Obtain customizable color for top banner upon request via support (for online booking).

5) Auto Inactivate Patients

- a. CareStack now allows you to automatically inactivate a patient based on when their last treatment Date of Service was or based on when their last appointment was. Patients can be excluded based on the patient's flag.

Change Patient to Inactive

Automatically change patient to inactive : ☒ Yes ☐ No

Change patient status to inactive if it has been longer than since the patient's last

☒ Tx. Date of Service
☒ Completed Appt.

Exclude patients with labels : ☒ COL

Revenue Cycle Management

1) Ledger

a) Insurance Payment Split

- i) A single insurance payment receipt will be entered on the ledger as one receipt, rather than separate receipts for a multiple treating provider claim.
- ii) If a provider or location is changed/updated on a completed procedure code, system transactions will state a reversal of that code, followed by a new code

completion, that would result in 3 entries. This change is to facilitate a better audit trail when changes on location or provider occur.

01/20/2023	D1110	PROC-D	Completed ProphylaxisA with DOS 01/19/2023	Old	\$0.00	\$63.00	\$0.00	\$2,978.30
01/20/2023	D1110	PROC-D	Completed ProphylaxisA with DOS 01/19/2023	New	\$0.00	\$63.00	\$0.00	\$3,041.30
01/20/2023	D1110	MANREV	REVERSED : Completed ProphylaxisA with DOS 01/19/2023	Reversal of Old	\$0.00	-\$63.00	\$0.00	\$2,978.30

2) Insurance warnings

- Avoid a situation where there is an outstanding insurance balance and no open or future claim to be billed/batched, with the addition of guided workflows and prompts. When an insurance receipt is deleted, reversed, or an additional 'insurance adjustment ON' is made against a code, with a closed claim or no future pending claim, there is a prompt to reopen the claim to avoid this potential mismatch.

Delete Insurance Receipt

Deleting an insurance receipt would do the following

1. All insurance payments posted using the receipt will be reversed.
2. All refunds made using the receipt will be reversed.
3. All patient payments posted using the transferred receipt will be reversed.
4. All adjustments made using the receipt will be reversed.
5. All refunds and adjust-offs made using the transferred receipt will be reversed.
6. All transferred receipts will be deleted.
7. All provider adjustments will be reversed.

Insurance Payments (6) Adjustments (1)

Closed Claim(s):
The following closed claim(s) have to be Re-opened. Enter reason to proceed with the claim(s) reopen and receipt deletion.

Patient	DOS	Claim#	Claim Order	Carrier Name
Gerrard, Alisha (10032465)	05/29/2022	188645	Primary	CIGNA
Reason for Re-open * : Copy to All				
Test79, Test79 (10032508)	06/08/2022	188688	Secondary	ACCEPTANCE INSURANCE
Reason for Re-open * : Copy to All				
Test79, Test79 (10032508)	06/08/2022	188689	Primary	New PPO
Reason for Re-open * : Copy to All				
Test79, Test79 (10032508)	06/08/2022	188690	Secondary	ACCEPTANCE INSURANCE

Reason for Deleting Receipt * :

Cancel
Re-open Claim & Delete

3) Claim warnings

- If you try to create a claim from the appointment or chart modal with a completed procedure code that is already in another claim, or has a billing order of N, you will now get a pop up that states clearly which procedure code cannot be included in the claim

creation and why. If you click proceed, it will create the claim with the codes that can be included.

Warning

Please review the following before proceeding.

1. One or more of the selected codes are already part of another claim.

- Claim #190367: D2330, D2330

Higher order claims should include the same codes as the corresponding lower order claims.

2. Claims(s) for the following codes(s) could not be created due to the mentioned reason(s)

DOS	Code - Description	Reason
12/02/2022	D2330 - Resin Composite One Surface Anterior	Billing order is set as N
12/02/2022	D2330 - Resin Composite One Surface Anterior	Primary Claim already exist

Do you want to proceed creating claim for rest of the code(s)?

Cancel
Proceed

4) Patient Payments

a) Payment Plan updates

i) The number of payments have to be greater than what has already been processed. If editing an existing payment plan, and the number of payments is less than what has already been processed, there will be an orange error alert, and a new payment plan agreement will NOT be generated.

Payment Plan : Payment Plan #1

Payment Plan Overview

Periodic Payment Amount must be greater than \$0.00
Number of Payments should be greater than already processed schedules

Plan Name : Payment Plan #1
Patient Name : Gerrard, Alisha (10032465)
Location : MALL L : Celebration Dental - Mallory Circle L
Plan Type : General
Status : Active
Total Amount : \$ 1000.00
No Treatment Procedure are contracted under this plan

Down Payment Details
Down Payment Amount : \$100.00
Receipt Details : Receipt Deleted

Financial Details
Financed Amount : \$900.00
APR (%) : 0
Contracted Amount : \$900.00
Number of Payments : 3
Periodic Payment Amount : \$ Enter Amount
Payment Frequency : Monthly
First Periodic Payment Date : 11/10/2022

Additional Details
Payment Posting Preference : Post against patient balance first, then post it
Order of Posting : Oldest First Order Newest First Order
Notes :

Payment Details
Payment Type : CREDIT/DEBIT CARD - American Express
Auto-Debit : Disabled

Agreement Details
Payment Plan #1 - Consent Form Most Recent

Created Date	Signed Date	Status	Actions
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ii) When a payment plan has been terminated or completed, the COF flag will be removed from the patient labels/flags for that particular patient, automatically. The COF flag only applies to an auto debit payment plan.



iii) When entering an income reduction payment against a patient balance, the verbiage has been enhanced for more clarity on the impacts of that payment type.

Payment Amount * : \$ 1809.08 Location * : OHIO : Ohio State Payment Date * : 01/23/2023

Payment Type * : INCOME REDUCTION - Provider Pa Provider * : Select Provider

The income reduction receipt(s) will be listed (by transaction date) on the 'Income Allocation Report' against respective provider(s) to manage any resulting payroll changes.

Adj. Code : Select Adj. Code

5) Payment Service Transactions

- There is an addition of location dropdown within the grid as its own column, rather than a location dropdown at the top and within the grid, while searching Bluepay or CS Pay transactions per merchant account. This ensures that you can select multiple locations at a time, rather than being restricted to just one at a time.

Payment Service Transactions

Service : CS Pay Merchant ID : 10000000038 Select Period : ☒ Today ☐ Last 7 days ☐ Last 30 days

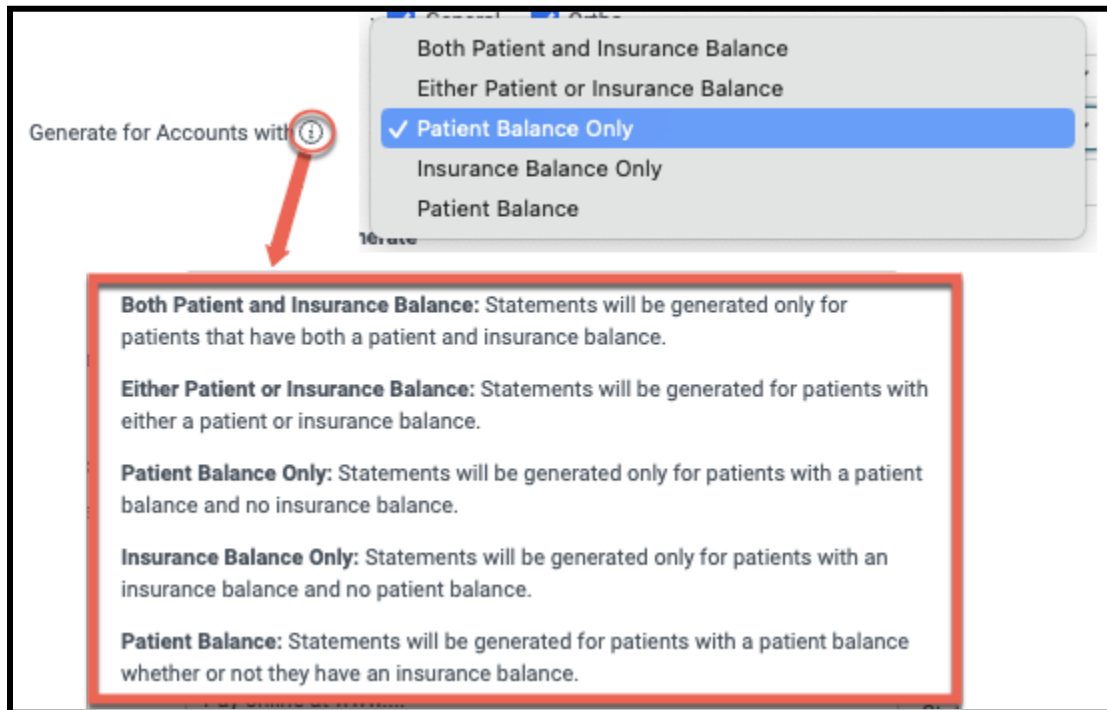
Payment Date	Receipt #	Location	Transaction #	Method	Paying Entity Name	Amount
Select a date		Select		Select		
01/23/2023	253845	Ohio State	100000000742	Payment Plan	Gerrard, Alisha (10032465)	\$2
01/24/2023	253844	Celebration Dental - Front Street	100000000741	Payment Plan	Mr. Dan, Lin (10031012)	
01/23/2023	253843	Celebration Dental - Front Street	100000000740	Regular	Mstr. Momota, Kenta (10031019)	

< 1 to 3 >

6) Statements

a) E-statements

- i) We have replaced 'patient due' with 'patient amount due' in the e-statement email notification.
- ii) In the statement generation criteria, we updated the wording for each **'generate for accounts with'** to include the descriptions for each option.



Reporting and Analytics

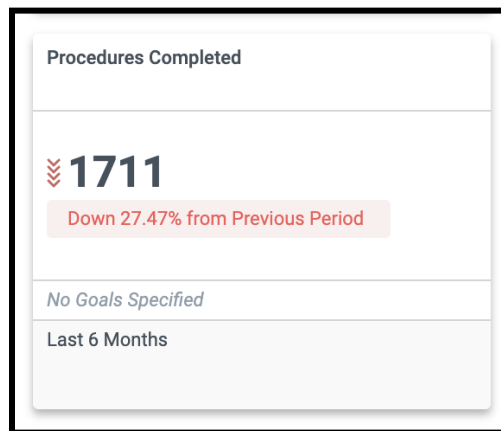
1) KPI's

a) New KPI: Procedures Completed

- i) We will be adding a new KPI called **Procedures Completed** that tracks the total number of procedures completed based on the transaction date. To view the Procedures Completed KPI, navigate to your **System Menu > Operational Reports > Scorecards/Analytics Dashboard**.
- ii) The Procedures Completed KPI is available both within the **Scorecards** as well as the **Analytics Dashboards**. Within the Scorecards, users have the option to view the number of codes completed by **CDT Category, CDT Code, Location, Provider, Provider Type, Service Type** and **Specialty**. Whereas on the Analytics Dashboard, users have the unique ability to view the Procedures Completed Trend by period or previous year.

The screenshot shows the CARESTACK Analytics Dashboard. The 'Analytics Dashboards' tab is selected. A table displays CDT Categories and the number of Procedures Completed. The table has columns for CDT Category and Procedures Completed. The data is as follows:

CDT Category	Procedures Completed
Diagnostic	15
Endodontics	1
Maxillofacial Prosthetics	1
Oral and Maxillofacial Surgery	5
Orthodontics	9
Periodontics	1
Preventive	1
Restorative	7
Total	43



2) End of Day Report

- UI enhancements have been added to improve the overall usability of the End of Day report.
 - The Opening AR and Closing AR within the Performance Summary have been renamed **Opening Balance & Closing Balance** for improved readability and understanding.
 - Displays an **i icon** to emphasize the core idea of MTD, YTD values to the user.
 - Introduced **Total** section for receipts.
 - Ability to view **Adjustments**.

End of Day Report - 09/20/2022 for Location: OHIO

Performance Summary

KPI	Value for 09/20/2022
Opening Balance	\$39,096.10
Closing Balance	\$40,064.50
Net Production (TXN)	\$1,223.12
Net Collection (TXN)	\$365.59
OTC Rate	98.50 %
Patient Collection Rate	89.40 %
Insurance Collection Rate	16.14 %
Patients Seen	2
New Patients Seen	0
Average Gross Prod/Visit	\$611.56

Provider Summary

MTD, YTD values refers to the start of month, year to the date selected

Provider	Patients Seen	Avg Gross Prod/Visit	Sched Prod	Gross Prod (TXN)	Net Prod (TXN)	Prod Adj	Net Applied	Coll Adj
SHAJ	2	\$575.27	\$0.00	\$1,150.53	\$1,150.53	\$0.00	\$187.34	\$0.00
MTD			\$0.00	\$1,150.53	\$1,150.53	\$0.00	\$187.34	\$0.00
YTD			\$0.00	\$5,322.53	\$5,322.53	\$0.00	(\$228.66)	(\$416.00)
SRIKAN	1	\$72.59	\$0.00	\$72.59	\$72.59	\$0.00	\$67.38	\$0.00
MTD			\$0.00	\$72.59	\$72.59	\$0.00	\$67.38	\$0.00
YTD			\$0.00	\$72.59	\$72.59	\$0.00	\$67.38	\$0.00