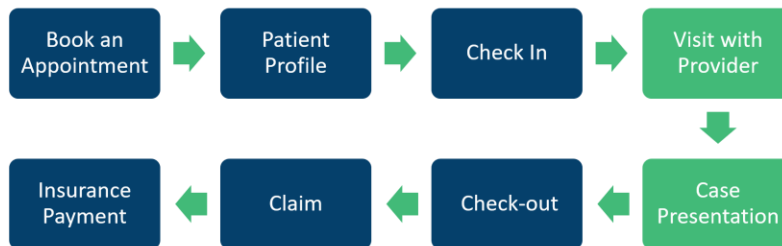


# Your CareStack Chart

## Overview

There is a lot to the CareStack software from appointments to records. In the context of a typical workflow, your clinical work lands smack in the middle.



At this point, you can expect that the profile and check-in steps are complete. If the patient has insurance, those details are connected to the profile, so any estimates for the cost of treatment will be as accurate as possible.

Those billing steps are yet to come. Your work in the chart is part of that effort as you complete treatments for the patient.

## Explore the Chart

### Getting There

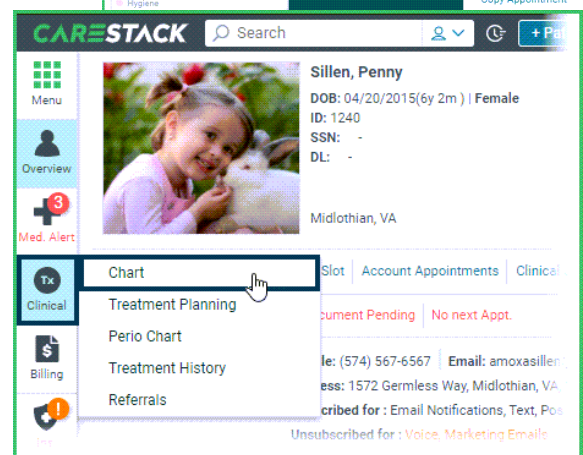
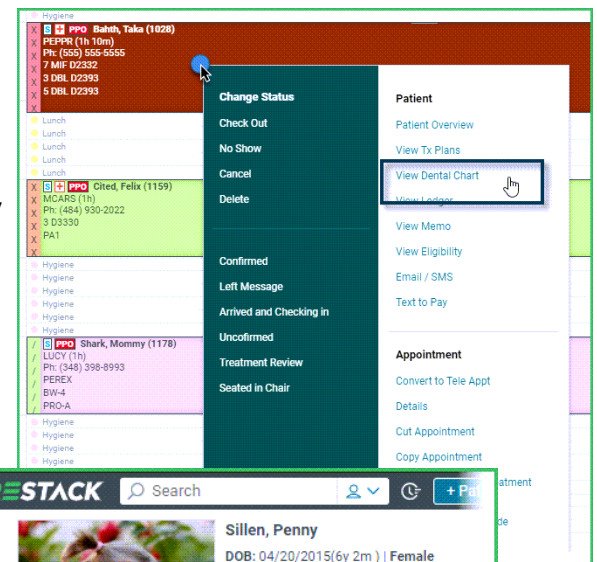
CareStack records are deeply integrated so you can open the chart from anywhere in the patient's profile, or from the Scheduler -whichever you prefer.

Since we are so focused on time and appointments, many people like to start from the **Scheduler**.

1. Right-click on the patient's appointment to open the menu.
2. Select **View Dental Chart**.

Other people find themselves reviewing the Ledger or Overview before jumping into the chart. In that case, select **Chart** from the **Clinical** icon on the patient navigation bar.

**HINT:** Simply clicking the clinical icon will take you directly to the chart without the slider.



## Exploring

Once there, you have the entire clinical world at your fingertips.

The screenshot displays the CARESTACK software interface. At the top, there's a navigation bar with tabs like Patient, Alert, Form, Presc, Memo, Lab, Recall, and Message. Below this, a sidebar on the left contains icons for Overview, Med Alert, Clinical, Billing, and Appointments. The main area is divided into several sections:

- A. Clinical Summary:** A pop-up window showing patient details, including name, date of birth, and a list of treatments with dates and costs.
- B. Odontogram:** A color-coded representation of the patient's mouth, showing teeth and their status.
- C. Clinical Software:** A grid of icons for various clinical procedures like X-Rays, Quick PA, Prophylaxis, etc.
- D. Care Panel:** A section for adding elements to the chart record, including X-Rays, Quick PA, Prophylaxis, etc.
- E. Chart Details:** A table showing a list of treatments with columns for Date, Description, Tooth/Area, Surface, Provider, Location, Treatment Plan, Phase, Pat. Est, Ins. Est, Fee, Status, Notes, N/A, and User Name.
- F. Filters:** A set of buttons for filtering the chart details, such as All, Conditions, Existing, Planned, Today, Completed, Notes, Notes to Complete, Notes to Review, Documents, and Everything.
- G. Chart to Advanced Planner Switch:** A toggle switch at the top left of the main area.

The different elements serve important purposes as you work with the patient.

- A. Clinical Summary:** Confirm your patient's identity and/or go deeper to show the patient's conditions and allergies from the medical history, a count of treatments, and financial details.
- B. Odontogram:** Color and pattern coded representation of the patient's mouth.
  - Click the *i* icon to peek at your practice's settings for color and pattern.
  - Hover over a tooth to show a pop-up of its associated treatments.
- C. Clinical Software:** Access any integrated clinical software. Your specific steps and configuration will depend on the software your practice uses like x-ray or probing software.
- D. Care Panel:** Customizable tools for quickly adding elements to the chart record.
- E. Chart Details:** Descriptive details about all of the chart elements.
- F. Filters:** Standard filters to easily focus on key information within the Chart Details. Your practice can build special filters for your use, or you can customize one on the fly.
- G. Chart to Advanced Planner Switch:** Toggle back and forth from the chart and the planner. These options have different focuses and available tools.

**Video Reference:** <https://vimeo.com/569046217>

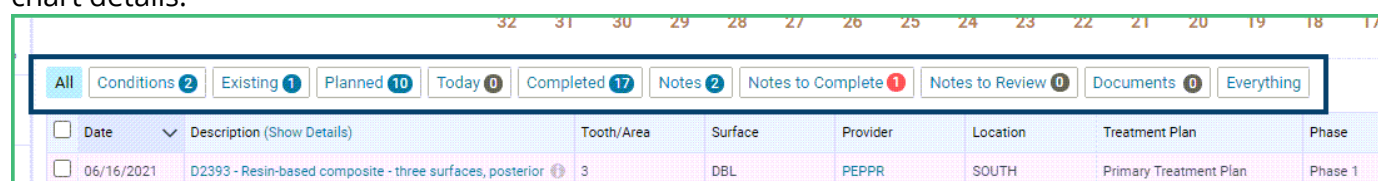
## Customizing Your Chart Details

The detail section of the CareStack chart is yours to personalize so it suits the way that you work. Depending on what you need, you can:

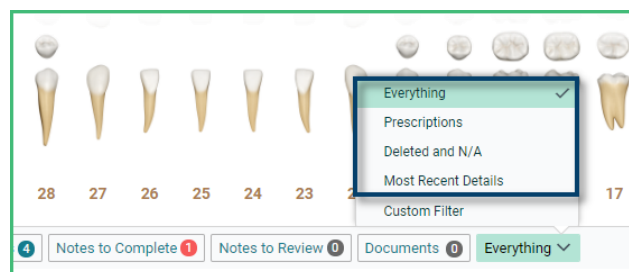
- Filter the view to see only certain types of entries
- Color those entries by CDT category or status
- Sort entries by key characteristics

### Filters

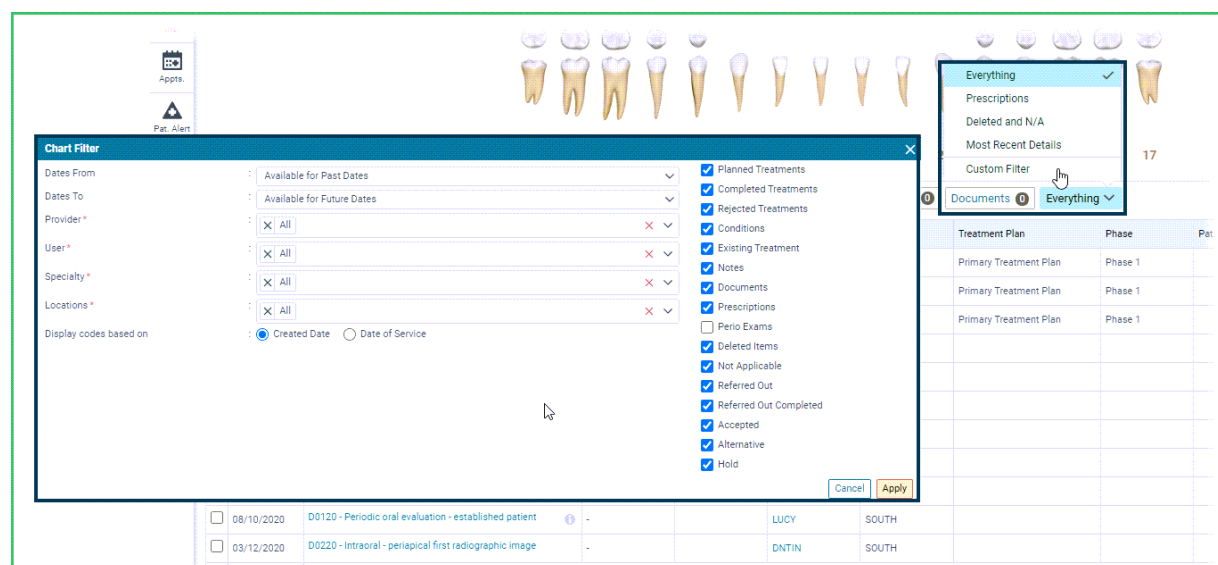
You've already learned that you can choose filter tabs for the elements you want to see in the chart details. CareStack built the ones you are most likely to need and laid them out as tabs just above the chart details.



With the last filter tab, you have even more flexibility. Your practice administrator may have created special filters just for you.



If you need something else, you can build a custom filter on the fly by clicking Custom Filter and selecting your desired options. Once set, the chart details will display only the items you've selected. It's a great way to audit entries or track patterns.

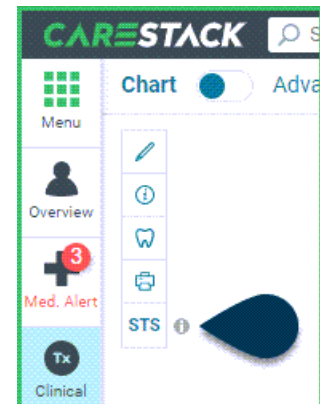


## Color-Coding

Even within a tab, you may want to distinguish the line items. You can color-code them using this bottom icon within the odontogram. It's a rotating toggle.

You have three options:

- CDT Category - CDT:** Color-code the chart detail lines using the *CDT code category* -preventative, restorative, etc.
- Status - STS:** Color-code the chart detail lines by their status -planned, accepted, completed, etc.
- Normal - NOR:** Leave the chart detail lines without color.



This chart is color coded as STS, shading the full entry line with the color of the treatment's status.

Date	Description (Show Details)	Tooth/Area	Surface	Provider	Location	Treatment Plan	Phase	Pat. Est.	Ins. Est.	Fee	Status
06/16/2021	D2393 - Resin-based composite - three surfaces, posterior	3	DBL	PEPPR	SOUTH	Primary Treatment Plan	Phase 1	\$122.40	\$89.60	\$212.00	Proposed
06/16/2021	D2393 - Resin-based composite - three surfaces, posterior	5	DBL	PEPPR	SOUTH	Primary Treatment Plan	Phase 1	\$42.40	\$169.60	\$212.00	Proposed
06/16/2021	D2332 - Resin-based composite - three surfaces, anterior	7	MIF	PEPPR	SOUTH	Primary Treatment Plan	Phase 1	\$61.20	\$244.80	\$306.00	Proposed
03/15/2021	Caries	19	MOD	JCASP							Condition
03/15/2021	JCASP: Casper, Jennifer   Type of Prophy - Adult Prophy Reviewed Medical History - changes noted on medical history form										
03/15/2021	D1206 - Topical application of fluoride varnish	-		JCASP	SOUTH			\$35.00	\$0.00	\$35.00	Completed
11/25/2020	D2751 - Crown - porcelain fused to predominantly base metal	1									Existing
08/10/2020	D1110 - Prophylaxis - adult	-		LUCY	SOUTH			\$0.00	\$78.00	\$78.00	Completed

## Sort

You can also change the order of the items in the chart details list by sorting by one of the characteristics. Entries start organized by date, newest to oldest, but you can change it to start with the oldest using the column headers just like in Excel and Google sheets.

<input type="checkbox"/>	Date	Description (Show Details)	Tooth/Area	Surface	Provider
<input type="checkbox"/>	12/03/2018	D0120 - Periodic oral evaluation - established patient	-		JCASP
<input type="checkbox"/>	12/03/2018	D1110 - Prophylaxis - adult	-		JCASP
<input type="checkbox"/>	12/03/2018	D0274 - Bitewings - four radiographic images	-		MOLR

Filter the chart details by a single tooth by clicking the tooth in the odontogram.

Date	Description (Show Details)	Tooth/Area	Surface	Provider	Location	Treatment Plan	Phase	Pat. Est.	Ins. Est.	Fee	Status	Notes	N/A	User Name
06/28/2021	Watch #19   JCASP: Casper, Jennifer   Watch Tooth For	19		JCASP							Condition			Casper, Jennifer
06/28/2021	Watch	19		JCASP							Condition			Casper, Jennifer
03/15/2021	Caries	19	MOD	JCASP	SOUTH	Primary Treatment Plan	Phase 2	\$40.28	\$181.12	\$201.40	Proposed			Casper, Jennifer

**Video Reference:** <https://vimeo.com/569058053>