

Building a Chart

Overview

One hallmark of CareStack is flexibility. There are different ways to find or use the information in the patient record. You'll find too there are different ways to add information into the chart.

The Care Panel is a set of shortcuts for your frequently used chart elements -conditions, codes, and more. You can also access all the potential codes at once in a searchable slider. You may find a favorite way to use in every situation, or you may do different things under different circumstances.

There are different elements you'll need to enter in the chart depending on what you find in the patient's mouth. In the chart, you'll be entering:



- Conditions:** Circumstance that impacts the tooth but is not a treatment
- Existing Treatment:** Procedure that was performed before this initial charting, typically at another time and place.
- Planned Treatment:** Procedure that is recommended based on the diagnosis. Ultimately, these become the patient's treatment plan and can be structured into groups and phases.
- Completed Treatment:** Procedure that was performed by the provider during the appointment. Charges are posted to the ledger immediately upon completion.
- Care Notes:** Written documentation of the procedure or appointment, completed with prompts and responses.

The elements will display in the odontogram and in the chart details using colors set by your practice.



The screenshot displays the CareStack software interface. At the top, there's a navigation bar with options like Patient, Alert, Form, Presc, Memo, Lab, Recall, Message, and Print. Below this, the main area is divided into two sections. The left section shows a dental chart with 16 teeth, each with a corresponding icon and a color-coded status. The right section shows a 'Care Panel' with various treatment options categorized by type (Exam, X-Rays, Quick PA, Prophyl, etc.). Below the chart and care panel, there's a table 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. The table lists several treatment entries with their respective dates, descriptions, and financial details.

Date	Description (Show Details)	Tooth/Area	Surface	Provider	Location	Treatment Plan	Phase	Pat. Est	Ins. Est	Fee	Status	Notes	N/A	User Name
10/13/2020	D0220 - Intracanal - periapical first radiographic image	-		PEPPR	SOUTH			\$26.50	\$0.00	\$26.50	Recommended			Casper, Jennifer
10/13/2020	D0140 - Limited oral evaluation - problem focused	-		PEPPR	SOUTH			\$53.00	\$0.00	\$53.00	Recommended			Casper, Jennifer
08/13/2020	D7140 - Extraction, erupted tooth or exposed root (eie... 17	17		MCARS	SOUTH	New Treatment Plan	Phase 3	\$31.80	\$127.20	\$159.00	Accepted			Casper, Jennifer
08/13/2020	D7140 - Extraction, erupted tooth or exposed root (eie... 32	32		MCARS	SOUTH	New Treatment Plan	Phase 3	\$31.80	\$127.20	\$159.00	Accepted			Casper, Jennifer
10/27/2019	D7140(41, #16) MCARS: Carson, Marie Extraction Reviewed Medical History - no changes needed. Tooth or teeth numbers: 1,16&nbs													Casper, Jennifer
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (eie... 1	1		MCARS	SOUTH	New Treatment Plan	Phase 2	\$30.00	\$120.00	\$150.00	Completed			Casper, Jennifer
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (eie... 16	16		MCARS	SOUTH	New Treatment Plan	Phase 2	\$125.00	\$25.00	\$150.00	Completed			Casper, Jennifer
10/10/2019	D2750(43) MCARS: Carson, Marie Treatment Rational: Type of procedure - Type of procedure - Is this initial placement?													Casper, Jennifer
10/10/2019	D2750 - Crown - porcelain fused to high noble metal 3	3		MCARS	SOUTH	New Treatment Plan	Phase 1	\$143.70	\$861.30	\$1,007.00	Proposed			Casper, Jennifer
08/30/2019	[#6, #9] MCARS: Carson, Marie Reviewed Medical History - changes noted on medical history form. Teeth 8 and 9 were kn													Casper, Jennifer

Before You Start Your Chart





Your CareStack chart doesn't stand alone. It's deeply connected to the patient records, appointments, and billing.

Before you jump in and start charting, there are two important things to do:

-  Review the appointment settings
-  Confirm the dentition

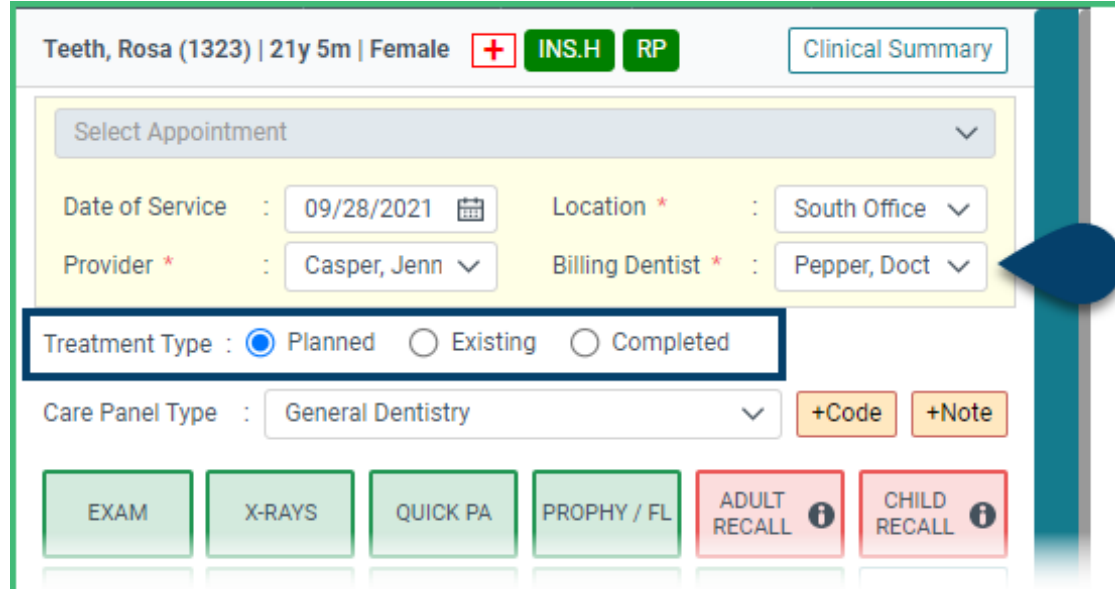
Appointment Details

The appointment settings are in the upper right corner of the chart and emphasized in yellow. The box lists several important elements about the current appointment:

-  Date, time, and status
-  Location
-  Provider
-  Billing Dentist

The billing dentist is a very important element. In fact, CareStack won't let you make any entries without one. Selecting the billing dentist helps CareStack associate claims with the correct provider, reducing rejections and delays in getting paid.

Select your **Billing Dentist** from the dropdown list.



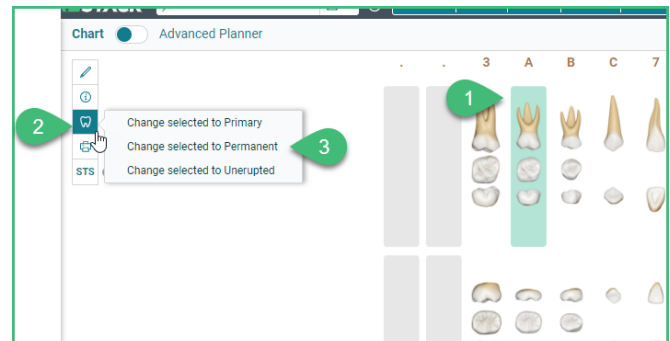
Just below the appointment details, you'll find the treatment type selector. This is where you will tell CareStack if the treatment is **planned**, **existing**, or **completed**.

By default, CareStack has **planned** selected for you. Easily change the type with the radio button. Once you do, that type will remain until you change it to something else.

Dentition

When a patient's chart is opened for the first time, the dentition is based on the patient's age range. If that doesn't match, change a tooth or teeth to unerupted, primary, or permanent within the odontogram.

1. Select the tooth or teeth by clicking on them.
2. Click the **dentition icon**.
3. Select the desired option.



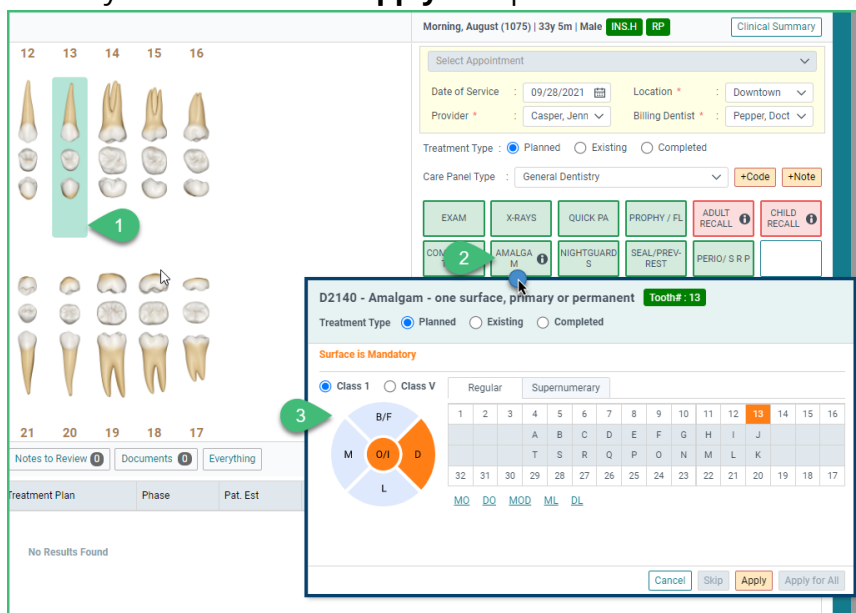
With the correct dentition set, you are ready to begin adding conditions and treatments.

Video Reference: <https://vimeo.com/619568314>

Adding Elements With the Care Panel

Now you are ready to start adding elements to the chart. Fundamentally, it is a simple process, no matter the element:

1. Pick your **tooth** or teeth.
2. Pick your element from the **Care Panel**.
3. Add any **details** and click **apply** if required.



I say, "if required" because many codes don't require extra details and there won't be anything else to chart beyond the tooth and the code.

Video Reference: <https://vimeo.com/619568208>

Adding Elements Without the Care Panel

You can tell the Care Panel is a very useful tool. With a thoughtful design, it can handle your most common elements, so you add a condition or treatment with as few as two clicks.

What happens if you need an element that isn't on the Care Panel, or you just don't like it? Not to worry. CareStack can help you with that too using the code slider.

1. Click **+Code**.

The screenshot shows the top section of the Care Panel. It includes fields for 'Provider' (Casper, Jenn) and 'Billing Dentist' (Pepper, Doct). Below these are radio buttons for 'Treatment Type' (Planned, Existing, Completed) and a dropdown for 'Care Panel Type' (General Dentistry). To the right of the dropdown are two buttons: '+Code' and '+Note'. A green circle with the number 1 is placed over the '+Code' button. Below these are several buttons for different treatments: EXAM, X-RAYS, QUICK PA, PROPHY / FL, ADULT RECALL, CHILD RECALL, COMPOSI, AMALGA, NIGHTGUARD, SEAL/PREV, and PERIO / S D P.

CareStack will open the **Add Treatment** slider. From there:

2. Find your element.
3. Add any **details** if required. CareStack will let you know by emphasizing the row in red. Click anywhere in the row to open the details window.
4. Post to the chart.

The screenshot shows the 'Add Treatment - JCASP - DNTN' window. It has a 'Treatment Type' section (Planned, Existing, Completed) and a 'Conditions' section. The 'Treatments' section is active, showing a list of treatments. The row 'D2330 - Resin-based composite - one surface, anterior' is highlighted in red. A green circle with the number 3 is placed over this row. To the right of the list is a table with columns 'Description', 'Tooth/Area', 'Surface', 'ICD', and 'Status'. The row 'D2330 - Resin-based composite - one surface, anterior' is highlighted in red. A green circle with the number 4 is placed over the 'Status' column of this row. A details window is open for this treatment, showing a 'Tooth/Area' dropdown and a 'Surface' dropdown. The 'Surface' dropdown is set to 'Regular'. A green circle with the number 4 is placed over the 'Surface' dropdown. The details window also shows a 'Class' section (Class 1, Class V) and a 'Tooth' section (M, O/I, D, L). The 'Tooth' section is set to 'M'. The details window has buttons for 'Cancel', 'Skip', 'Apply', and 'Apply for All'.

That seems like more clicks. It technically is, but you also saw there is some great flexibility to enter multiple elements in one fell swoop instead entering up and down in different windows.

Video Reference: <https://vimeo.com/619568142> and <https://vimeo.com/619568059>

Exploring the Entries

Entries are now in the chart. Let's see what details are there.

In the odontogram, most treatments and conditions will be displayed in your practice's chosen color. If a material is involved, a specific pattern is used so you can distinguish them at a glance.

The screenshot shows the CARESTACK Advanced Planner interface. At the top, there's a search bar and navigation tabs: Patient, Alert, Form, Presc., Memo, Lab, Recall, Message, and Print. Below this is a menu on the left with options like Overview, Med. Alert, STS, Clinical, and Billing. The main area displays an odontogram with 16 teeth numbered 1 to 16. Teeth 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, and 16 are shown with various patterns and colors indicating treatments. Below the odontogram is a table of entries:

Date	Description	MCARS	Location	Treatment Plan	Phase	Fee	Status	Provider			
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (ele...	1	MCARS	SOUTH	New Treatment Plan	Phase 2	\$30.00	\$120.00	\$150.00	Completed	Casper, Jennifer
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (ele...	15	MCARS	SOUTH	New Treatment Plan	Phase 2	\$125.00	\$25.00	\$150.00	Completed	Casper, Jennifer
10/10/2019	D2750(43) MCARS: Carson, Marie Treatment Rational Type of procedure -> Type of procedure -> Is this initial placement? ->										Casper, Jennifer
10/10/2019	D2750 - Crown - porcelain fused to high noble metal	3	MCARS	SOUTH	New Treatment Plan	Phase 1	\$145.70	\$861.30	\$1,007.00	Proposed	Casper, Jennifer
08/30/2019	[#8,#9] MCARS: Carson, Marie Reviewed Medical History - changes noted on medical history form - Teeth 8 and 9 were kn										Casper, Jennifer

At the bottom of the screen, you will see your entries listed out.

Remember that you can use the filter tabs to focus on a specific type of entry and the column headers to sort them.

Most importantly, the entry itself is a link to the **Code Snapshot**, an amazing summary of everything you would want to know about the code, from its entry details to its fee. It's here that you'll be able to make edits or see code level billing.

The screenshot shows the Code Snapshot for D2752 - Crown - porcelain fused to noble metal. It includes sections for Code Details, Clinical Information, Fee Calculation, and Billing.

Code Details:

- Status: Proposed
- Location: SOUTH : South Office
- Tx. Provider*: PEPPR: Pepper, Doctor
- Billing Dentist: PEPPR: Pepper, Doctor
- Date Of Service
- Treatment Plan: Select Plan
- Phase: Select Plan
- Notes
- Not applicable as of

Clinical Information:

- Tooth: 3
- Area: Select Area
- Surfaces: Select Surfaces
- Material: Porcelain Fused to High Noble Metal
- ICD Version: ICD 10
- ICD Code: Select ICD Codes up to 4

Fee Calculation:

- Primary Fee Schedule: PPO General
- Secondary Fee Schedule: N/A
- Billing Order*: D
- Pat. Estimate: 181.2
- Ins. Estimate: 724.8
- Fee: \$906.00
- Alter Total Fees: ☒

Billing:

Description	Receipt #	Date	Am
No R			

The bottom section shows a detailed breakdown of treatments for tooth 3:

Date	Description	Surf.	Prov.
07/19/2021	ZD2000-Deliver Crown		JCASP
07/19/2021	D2752-Crown - porcelain fused to no...		PEPPR
07/19/2021	D2950-Core buildup, including any pi...		JCASP
Existing			
01/01/2011	D2161-Amalgam - four or more surfa...	MODL	Prov.
Completed			
09/30/2021	D3330-Endodontic therapy, molar (ex...		PEPPR

You might also have noticed that you can hover over a tooth for a breakdown of the treatments associated with that tooth.