



Charta

Intelligent Revenue Capture with AI Chart Review



The Problem

100% of US healthcare providers review medical charts for revenue and clinical opportunities, costing at least \$85 billion every year.

Yet, **less than 2%** of charts are actually reviewed.



The Opportunity

If it's so valuable, why aren't more charts reviewed?

1

It's too expensive. A single chart costs as much as \$275 to review, with an average cost of \$80. Charts are typically reviewed by a degreed doctor or nurse for clinical quality, or an experienced certified medical coder for missed revenue opportunities and billing mistakes.

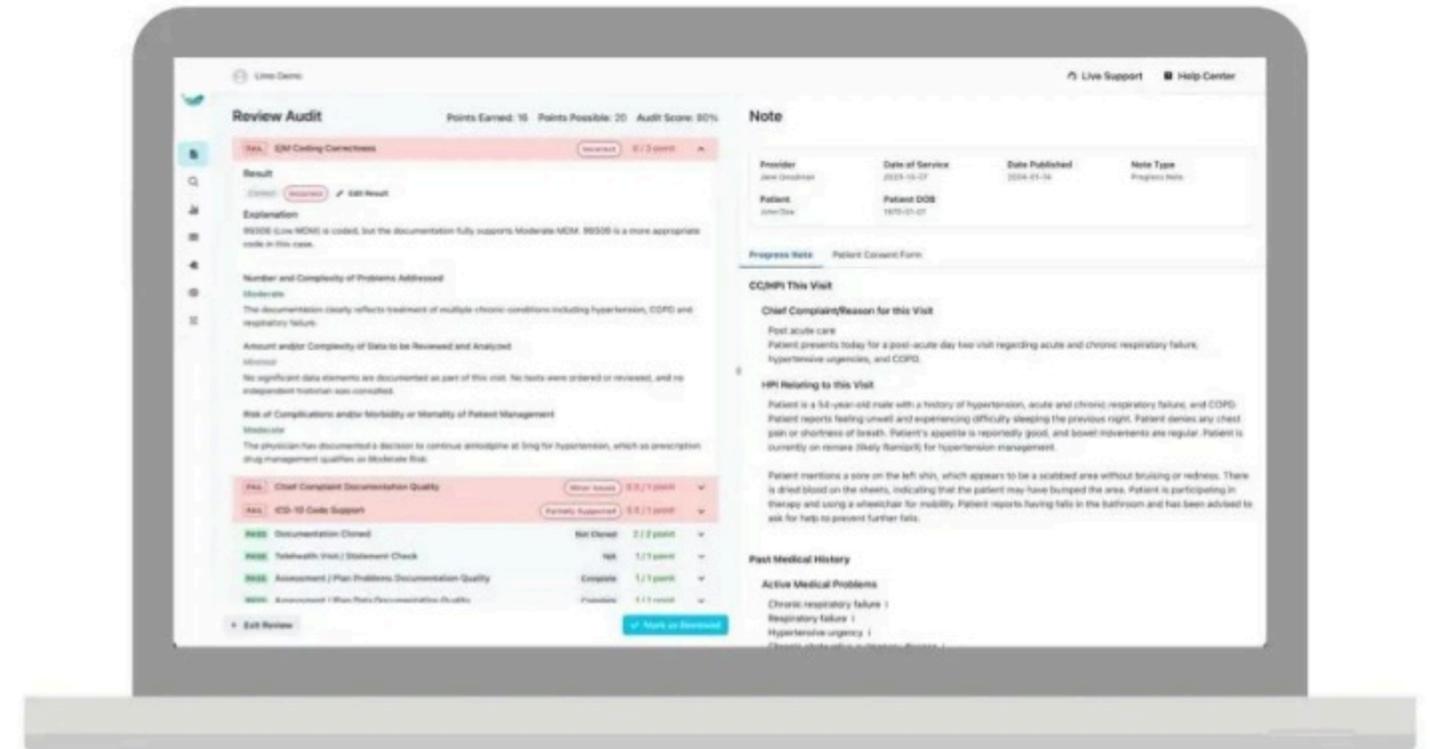
2

It takes too much time. A single chart review takes between 30-60 minutes to complete, and claims need to be submitted within 24 hours of the visit. As a result, charts are typically reviewed post-billing, and only a small percentage of charts are sampled for review.

The Solution

Charta leverages LLMs to perform a fully autonomous pre-bill review of every chart for revenue and clinical opportunities.

Product Demo





Why Charta?

We make and save healthcare providers **millions of dollars** without any additional work required.

Revenue Discovery

Perform a pre-bill review of every chart for missed coding opportunities.

↳ **Increase revenue up to 15.2%, with an average increase of 11%**

Denial Prevention

Perform a pre-submission review of every claim to discover and fix potential denials.

↳ **Identify and prevent up over 70% of denials before they happen**

Audit & Compliance

Review every chart in real-time based on your custom billing and clinical requirements.

↳ **Achieve 100% pre-bill audit coverage at less than 1% of the cost**



Insights

We have a 100% close rate from proof-of-concept to signed contract. What's worked?

1

Our unique **white-glove product design** enables us to deliver a proof-of-concept **within days** of receiving sample charts, tailor-made to their custom review criteria and data formats.

2

Positioning ourselves as a **pure upside, ROI-guaranteed** solution without requiring adoption of new workflows or replacement of existing workflows shortens sales cycles dramatically.



Case Studies

12.6% Increase in Primary Care Revenue

National telehealth provider for virtual urgent and emergent care in post-acute settings

Solutions

Charta Health's AI reviews charts pre-bill for missed CPT coding opportunities, under-coded CPT E/M codes, inaccurate ICD-10 diagnosis codes, and provider documentation for clinical quality affecting billability.

\$1.1m in Annual Revenue Capture

Leading national provider of in-person primary care and behavioral health services with 100+ facilities

Solutions

Charta Health's AI reviews 100% of charts pre-bill for missed CPT coding opportunities, under-coded CPT E/M codes, risk adjustment opportunities, and coding violations that will result in payor denials.

100% Audit Coverage at Less Than 1% Cost

National remote patient monitoring and chronic care management provider with 2.5M+ telehealth sessions per year

Solutions

Charta Health's AI reviews 100% of charts for additional and missing billable codes supported in the chart, justifications for billed services, and provider documentation for clinical quality affecting billability.

Leadership Team



Justin Liu

Co-Founder & CEO

Justin Liu (CPC) is the co-founder and Chief Executive Officer at Charta Health. He was previously the first product hire and head of growth at Rockset, a leading artificial intelligence and data infrastructure company which was eventually acquired by OpenAI. Prior to Rockset, Justin was a software engineer at Google on the cloud security team. He holds a B.A. in Computer Science and a B.S. in Business Administration from UC Berkeley.



Scott Morris

Co-Founder & CTO

Scott Morris (CPC) is the co-founder and Chief Technology Officer at Charta Health. He previously served as the head of product engineering and founding engineer at Rockset, a leading artificial intelligence and data infrastructure company which was eventually acquired by OpenAI. Scott holds a B.S. in Computer Science with a concentration in Artificial Intelligence from Stanford University.



Caesar Djavaheerian, MD

Chief Medical Officer

Dr. Caesar Djavaheerian is the Chief Medical Officer at Charta Health, with over 20 years of experience in emergency medicine. Caesar previously co-founded Carbon Health, a primary and urgent care chain with 150 clinics nationwide and earned his medical degree from the University of Rochester School of Medicine and Dentistry. In addition to his work at Carbon Health, he honed his skills at prestigious institutions including New York-Presbyterian Hospital and Weill Cornell Medicine. Alongside his clinical work, Caesar advises healthcare startups and is passionate about improving the healthcare ecosystem.



Tam Pham

VP, Healthcare Solutions

Tam Pham is the Vice President of Healthcare Solutions at Charta Health. Over the last three decades, she has emerged as a subject matter expert in risk adjustment and has taken on leadership roles at major health plans, large medical groups, and technology companies including Agilon Health, Apixio, SCAN Health Plan, and more. Tam has a successful track record of building practice management systems, risk adjustment AI models, new risk adjusted compensation models, and health & wellness centers.

Questions?

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