



## Introduction

Since 1992, patients have trusted the Coast Dental family of dentists to provide quality care in a friendly, caring environment.

Their trust has made Coast Dental one of the largest dental providers in the U.S. Coast Dental, along with its professional affiliations, have 119 locations in Florida, Georgia, Nevada and Texas.

## Powering Productivity

When new Records and Licensing Manager, Jeremy McMillen, started working at Coast Dental & Orthodontics four years ago, the company was already using RenewalTracker – an automated, cloud-based platform that enables companies to manage a wide range of licenses, contracts, and other items that need to be renewed on an annual or periodic basis.

“I checked out several other options but realized that RenewalTracker was my favorite because of its notification and reporting features,” McMillen said. “At a glance, I can see which items are coming up for renewal in 15 to 30 days, 20 to 60 days, and so on. As we have well over 100 locations spread across four states, this makes my job a lot easier.”

## Enabling Our Process

While working in RenewalTracker’s cloud-based environment, McMillen can assign each item a certain status that lets him know exactly where renewals are in their lifecycle – such as open, remitted, renewed, not renewed, and on-hold.

“I like that RenewalTracker enables me to add comments so I can note the number of professionals at a site, contact details for the city or state issuing the license, and other useful details,” he said. This feature helps me to keep my process consistent and makes it easier next time an item is coming due for renewal, as I have more information at hand. I am also able to track when we receive a certification and whether we have sent it to a dental office. Just in case one gets lost in the mail, I scan a copy into RenewalTracker so we can reissue it if necessary.”

*“RenewalTracker makes it simple to manage all the unique licensing criteria that our offices are subject to. Over the four years we have used the product, we have not had any late penalties.”*

Jeremy McMillan  
Records and Licensing Manager  
Coast Dental Services, LLC





## Ensuring Compliance

One of the potential tricky things about Coast Dental & Orthodontics' licensing is that the requirements are not uniform but vary by location. For example, some cities, counties, and states demand that every dental professional has their own set of individual credentials, in addition to those assigned to their office.

"RenewalTracker makes it simple to manage all the unique licensing criteria that our offices are subject to," McMillen said.

"No matter where an office is located or what the local or state government needs, I can make sure we're ahead of the game with keeping their licenses current. Over the four years we have used the product, we have not had any late penalties."

## Enhancing Collaboration

Another benefit that RenewalTracker provides Coast Dental & Orthodontics is the ability to populate a check request form with pertinent data, such as due date and the amount. McMillen then routes the form to the accounting department for processing, attaching a copy of the relevant license.

"RenewalTracker has made it easier for me to communicate with our AP office and provide them with the information they need to pay for licenses," McMillen said. "I can also do a screen capture to let them know how many check requests I have. It is nice to be able to view all of these in one place and with RenewalTracker's search function, I can find everything I need very quickly. Without it, I would be stuck using Microsoft Excel and several different databases instead of a single, intuitive tool."

## Customer Service

Another factor in the success of Coast Dental & Orthodontics' project is the close relationship between McMillen and RenewalTracker's team.

"There are some other systems that offer a similar level of customization and a comparable feature set, but RenewalTracker's customer service is second to none," McMillen said.

*"Unlike their competitors, the RenewalTracker team always replies promptly and gives me whatever I need. I cannot say enough about how responsive they are and consider them to be more like friends than a vendor. They've never let me down."*

Jeremy McMillan  
Records and Licensing Manager  
Coast Dental Services, LLC

## Never miss a renewal again.

RenewalTracker manages recurring renewals with automatic reminder notifications, saving time and effort by organizing and standardizing your process to ensure all commitments and regulations are met.

