



Major dental group alleviates data ‘chaos’ with Cleo’s secure integration platform

DentalAssociates *smile more.*

Company: Dental Associates
(Privately held)

Founded: 1973

Headquarters: Milwaukee

Employees: 800+

Industry: Healthcare/dental care, insurance, benefits enrollment

Business Need

Dental Associates is a large group dental practice and insurance organization based in Milwaukee. With 14 major dental clinics in Wisconsin and nearly 600 operatory facilities, the privately held company provides a wide range of care to businesses, individuals, and families across the state. Its mission is to deliver the highest quality of dental care and services to every one of its patients.

With so many locations, Dental Associates had enrollment data coming in from all directions, but it also regularly handled massive data transfers from its larger customers. The City of Milwaukee, Milwaukee County, and Milwaukee Public Schools, for instance, would submit huge files containing the personal information of thousands of enrollees. Dental Associates had to be able to see when this type of information was received and processed so it could take a proactive approach if a problem occurred.

Support for large files and enrollment data traceability were major needs that couldn't be addressed by its incumbent bedlam of file transfer workflows.

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IT Challenge

“Our file transfer processes before Cleo were chaos,” said Josh Moore, infrastructure manager at Dental Associates. “We had little visibility into whether transfers were successful, and manually chasing down that information wasted time.”

Dental Associates had been communicating with a VAN via SFTP (and using AS2 on the backhaul) and also used an FTPS connection service on the IBM iSeries. It also worked with a Cleo partner for EDI integration on the iSeries for 834 benefit enrollment and maintenance documents, and had numerous ad hoc file transfers via email, fax, and customer portals, with no web-enabled portal of its own.

Additionally, Dental Associates faced a HIPAA compliance issue, as the VAN it was using no longer met its security needs. The dental group sought a secure, consolidated solution to regain control over its information flows, reduce manual processes, maintain compliance, and improve the overall customer experience.

The Solution

Dental Associates chose the Cleo Integration Cloud™ to consolidate its communication and data transformation processes onto a single platform and support its burgeoning business. After an expedited implementation, Dental Associates gained:

- HIPAA-compliant file transfer and management
- Wide protocol support
- Triggers, alerts, traceability
- A single point of entry in its infrastructure
- Strong product support to enable easy client connectivity

Cleo’s scalable platform also accommodated additional Dental Associates projects and enabled growth into other markets. Dental Associates will tap Cleo for its DEA-mandated electronic prescription reporting needs as well as the secure file transfer mechanism for the HR department.

“I really appreciated that Cleo got to know us and our business to determine our needs,” Moore said. “They showed true dedication to our technology needs and also to making this a true business partnership, rather than just a vendor-customer transaction. That really stood out.”



“The secure integration capabilities, the HIPAA compliance enablement, and a quick ROI made the Cleo Integration Cloud™ an easy decision for Dental Associates. Cleo’s solutions are founded upon agility, ease-of-use, and innovation, and getting it all on a single platform made a world of difference. Our rapidly expanding dental practice can depend on Cleo technology for years to come.”

— **Josh Moore**,
infrastructure manager
at Dental Associates

