



Charlie Health

Charlie Health provides virtual high-acuity mental healthcare for teens and young adults (11-30). Their virtual Intensive Outpatient Program (IOP) combines supported groups, individual therapy, and family therapy into evidence-based, comprehensive, and personalized treatment plans.

DEMOGRAPHICS

- **INDUSTRY** | MEDICAL
- **HEADQUARTERS** | BOZEMAN, MT
- **FOUNDED** | 2020
- **EMPLOYEES** | 600+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | SALESFORCE, BILL.COM, UKG, JPM CHASE, COLLABORATEMD, NEXTGEN

SALES TEAM

- **NETSUITE** | KEVIN DEPRIEST, KYLE MILLIGAN
- **CARAVEL** | CAILA COHEN, SCOTT CURRY

NETSUITE SOLUTION

- **NETSUITE** | FINANCIALSFIRST STANDARD
- **MODULES** | RECORD TO REPORT, PROCURE TO PAY, SMART VIEW
- **INTERFACES** | JPM CHASE, UKG, BILL.COM, COLLABORATEMD, NEXTGEN, SALESFORCE, EMR

IMPLEMENTATION

- **TIMELINE** | 3 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | CHARLIE HEALTH WILL DEPLOY NETSUITE IN A MULTI-PHASE APPROACH WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 1 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 2

