

SmartEngage™

Recall lists age and A/R piles up — not for lack of caring, but for lack of staff. SmartEngage runs every practice-initiated campaign autonomously: balance recovery, recall, care-gap closure, and retention — each touch HIPAA-compliant and documented.

KEY FEATURES & CAPABILITIES

-  **Autonomous campaigns**
Collections, recall, care-gap closure, and retention — run end to end.
-  **13 outbound use cases**
Spanning patient accounting and proactive engagement.
-  **Compliance-first outreach**
Consent, TCPA windows, and frequency caps enforced automatically.
-  **Revenue Recovery suite**
Success-based pricing aligned to collected dollars (Q2 2026).
-  **Multichannel orchestration**
Voice, SMS, and email sequenced per person.
-  **Payment in-conversation**
Plans negotiated and payment completed — no transfer, no callback.

BENEFITS FOR HEALTHCARE ORGANIZATIONS

-  **Patients come back**
Recall and reactivation campaigns that actually run, every month.
-  **Care gaps closed**
Overdue care gets proactive, persistent follow-up.
-  **Revenue recovered respectfully**
42 North Dental collected \$7M+ in 7 months at ~3x ROI — with patient-friendly tone.
-  **Compliance you can defend**
TCPA windows, consent, and frequency rules enforced, with audit trail.

AI agents that work every balance, every recall, and every care gap — **so no patient forgotten.**



\$19M+

collected in <8 months (100+ location dso)

~3x

roi in ~6 months (42 north dental)

3-5%

ebitda expansion

13

outbound use cases

PRIMARY USE CASES

Patient balance recovery: Empathetic outreach with payment plans in-conversation.

Care-gap closure: Target overdue screenings flagged by SmartAnalytics.

Hygiene & wellness recall: Automated recall that books into open slots.

No-show prevention & win-back: Confirmations, at-risk outreach, reactivation.

Schedule a demo 
No balance
unworked. No
patient forgotten.

TECHNICAL SPECIFICATIONS

DELIVERY

Cloud-native, multi-tenant SaaS — no on-prem hardware.

SECURITY & COMPLIANCE

HIPAA (BAA); HITRUST r2; SOC 2; ISO 27001:2022; ISO/IEC 42001:2023; PCI-DSS 4.0; GDPR; CCPA; TX-RAMP. AES-256 at rest, TLS 1.2+ in transit; TCPA-governed outreach.

IDENTITY & ACCESS

SSO (SAML 2.0 / OIDC), SCIM provisioning, role-based access, audit logs.

INTEROPERABILITY

70+ EMR/PMS integrations; connects to existing phone systems; native, bidirectional write-back to the system of record.

DATA FOUNDATION

1B+ real-world interactions; 4.5T records across 30+ specialties; 57GB ingested daily.

TIME TO VALUE

Go-live in weeks; measurable ROI in under 90 days.

INTEGRATIONS

70+ EMR/PMS integrations · Existing phone systems — no rip-and-replace · **Native, bidirectional write-back** · **One integration across all three products** · **Patient data stays in your EHR**

Agents write back to the system of record — appointments booked in the PMS, payment plans recorded, care gaps closed, billing resolved with the patient's actual account data. Not screen-scraping or an API workaround.

ABOUT AQURIO



Aqurio (*uh-cure-rio*) is a purpose-built Agentic AI company for healthcare and high-stakes industries. It puts AI agents to work across the full patient and customer journey — closing care gaps, automating revenue cycle operations, and ensuring no patient and no dollar slips through. Built for regulated environments where getting it wrong isn't an option, Aqurio delivers real-time operational visibility, seamless enterprise integration, and outcomes that compound over time. For more information, visit aqurio.com.

Check out our
Weekly Live Demo

