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**MOD kevin\_moloney**

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Phoenix Weekly Release 0.0.0.1168

**Phoenix Online DPMS**

# Weekly Release

Build 0.0.0.1168 | October 23, 2017

These are the highlights of the new features available in this week's Phoenix DPMS release.

## Restorative Charting

Several exciting updates were implemented in the hard tissue charting functionality this week. This includes the ability to select hard tissue anatomy across multiple teeth and apply various conditions and diseases, with contextually-appropriate options. This is important in the support of charting workflows that chart by "all instances of {x}, then all instances of {y}, etc." as opposed to "everything I see on tooth {m}, then everything I see on tooth {n}". Additionally, this enhancement will become important as we expand to allow for the charting of existing

restorations and appliances, which will include multi-tooth items such as bridges. We also implemented a quick fix to allow “split occlusals” on the posterior molars for the permanent teeth to accommodate a finer resolution of restorative charting.

The screenshot displays a dental software interface. At the top, the Carestream DENTAL logo is visible, along with a 'Checkout Queue (6):' dropdown and three staff members: S. Hardin (08:00 am), A. Santiago (09:00 am), and V. Simon (09:45 am). The patient name 'Kevin Moloney' is highlighted in the top navigation bar. Below this, a dark navigation bar contains 'Home', 'Patient Record', 'Insurance', 'Clinical' (selected), 'Financials', 'Treatment Plan', and 'Files'. The patient's profile shows 'Kevin Moloney', a male (♂), 37 years old, with phone number (404) 770-6780. The 'Current Conditions' section shows 'No Current Conditions' and 'Last Charted:'. The 'Charting' section is active, showing 'Current Selection' as 'Tooth: 2.3' with '5 surfaces selected'. Below this, 'Chart Findings' are listed: Cracked, Chipped, Decayed, and Broken. A 'History' link is also present. The main area features a 3D dental charting tool with a grid of 20 tooth icons (arranged in two rows of five) labeled 1 through 5 and 32 through 28. The top row shows the lingual side of teeth 1-5, and the bottom row shows the lingual side of teeth 32-28. The middle row contains 2D square icons representing the occlusal surfaces.

This release also saw the initial implementation of the automated chart history, which records all of the events that have been charted. These charting event notes are arranged by date and can be searched / filtered by tooth number. Additionally, these notes are automatically filtered based on the current charting selections so that users can quickly review the charting history for hard tissue anatomy of particular interest. Next steps will include the ability to undo or revert charting events, the ability to treatment plan against current conditions / diseases, and support for more advanced searching and filtering of the charting history.

Carestream DENTAL Checkout Queue (6): S. Hardin 08:00 am A. Santiago 09:00 am V. Simon 09:45 am J. Hutchinson 11:15 am

Smiley Dental Surgery + Terrence Molarnator x Kevin Moloney x Administration x

Home Patient Record Insurance Clinical Financials Treatment Plan Files

Kevin Moloney 37 yrs (Self) (404) 770-6780 (0) +

Current Conditions 9 Current Conditions Last Charted: 10/24/2017 11:28 am

Current Restorations No Current Restorations

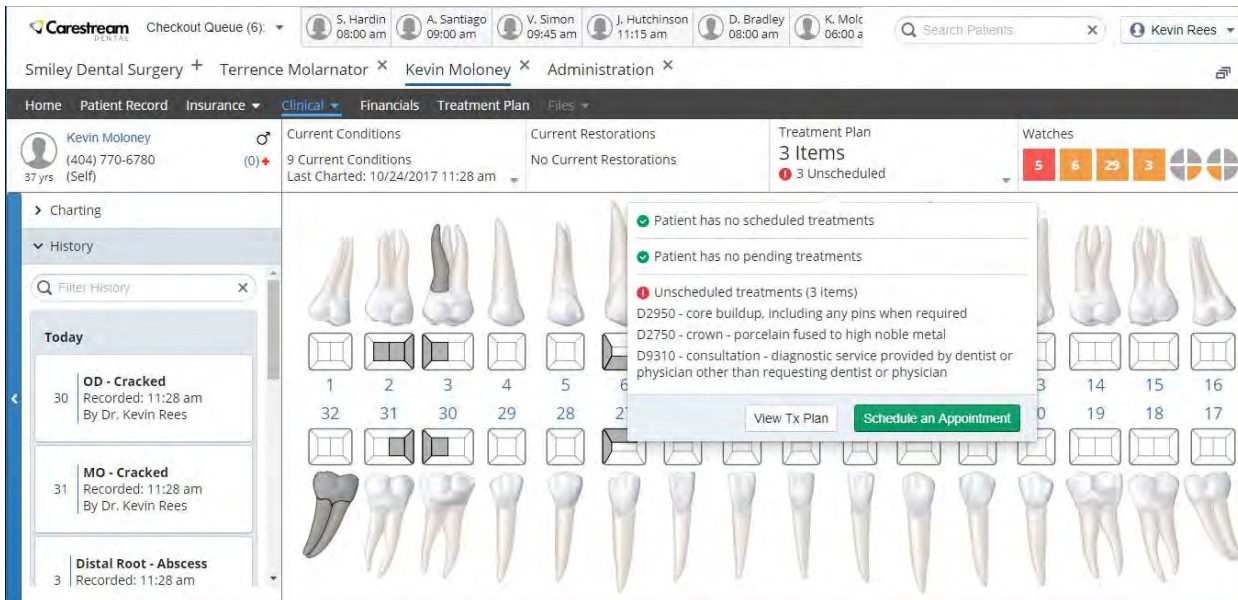
Charting History

Filter History

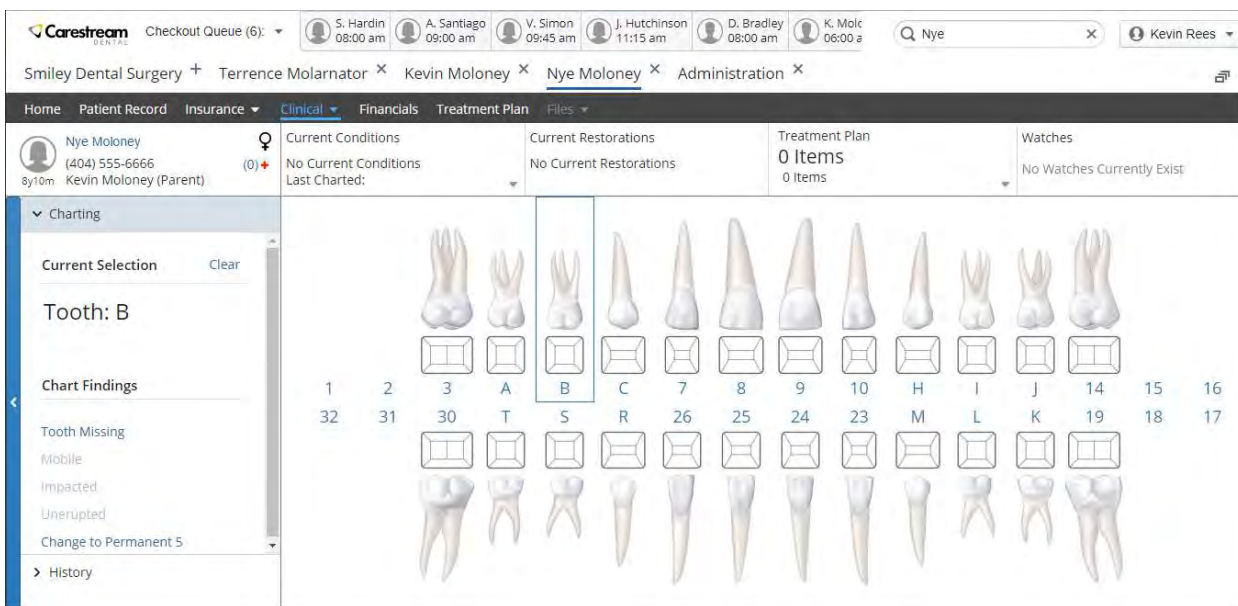
Today

- 30 OD - Cracked Recorded: 11:28 am By Dr. Kevin Rees
- 31 MO - Cracked Recorded: 11:28 am By Dr. Kevin Rees
- 3 Distal Root - Abscess Recorded: 11:28 am

We also implemented an initial version of clinical KPIs on the hard tissue chart, which helps provide visibility into the patient's current clinical state. This includes a Current Conditions module that displays the count and list of current conditions and diseases that have been charted. It also includes a Current Restorations module that displays the count and list of current restorations that have been charted (currently just a placeholder until users can chart these items). Additionally, a Treatment Plan module is available, that displays the count, status, and list of current planned work for the patient. Lastly, a Watches module displays the current list of applied watches.



Lastly, we have also implemented age-based chart defaults so that when new patient records are created a developmentally-appropriate hard tissue chart is created as a baseline. For example, very young patients will have mostly (or all) primary dentition, whereas patients in the 9 - 12 year old range will have appropriately mixed dentition, and adults will have permanent dentition. This addresses some workflow efficiency issues with establishing an anatomically accurate initial patient chart.



In the next few releases, we will continue to expand the library of charting events available to users, including the ability to chart various restorations and appliances. We will also focus on the integration of the Treatment Chart with the Hard Tissue Chart to support common exam workflows as well as support for “auto charting” completed work.

## Claim Processing Enhancements



This release also includes a handful of additions to the insurance claim functionality, including the generation of the claim files to be sent to the Carestream Dental clearinghouse. This includes the uploading / submission of claim batches to eServices for processing. This is the first step in getting claims out of Phoenix and submitted to payers via the eServices clearinghouse. Initial claim file validation with the eServices clearinghouse has passed successfully and we will be moving onto additional testing and the handling of claim status reports in Phoenix.

Additionally, several fixes to the “claimability” logic were also implemented this week. This includes the status refresh of the “Create New Claim” list as procedures are posted and adjusted. The “Unbilled” list will now correctly represent the subset of posted procedures in the Patient Ledger that are available to bill to the patient’s insurance. There were also a few usability issues addressed, including the alphabetical ordering of the claim status list to make the identification and selection of available claim states easier and an update to the Payer ID help text in the Create / Update Payer UI to better reflect the purpose of this field.

The screenshot displays the Carestream Dental software interface for a patient named Kevin Moloney. At the top, there is a navigation bar with the Carestream logo, a 'Checkout Queue (6)' dropdown, and several user avatars with their names and login times. Below this is a breadcrumb trail: 'Smiley Dental Surgery + Terrence Molarnator x Kevin Moloney x Nye Moloney x Administration x'. The main interface has a dark header with navigation options: 'Home', 'Patient Record', 'Insurance', 'Clinical', 'Financials' (selected), 'Treatment Plan', and 'Files'. On the left, a sidebar shows the patient's profile: 'Kevin Moloney', '(404) 770-6780', '37 yrs', and '(Self)'. The main content area is titled 'Ledger for Kevin Moloney' and shows a summary of due amounts: 'Total Due \$1,741.00', '0-30 Days \$1,741.00', '31-60 Days \$0.00', and '61-90 Days \$0.00'. Below this is a table of transactions with columns for 'Trans Date', 'Svc Date', 'Code', and 'Description'. The table shows two entries: one for 'Charge Adjustment' and another for 'ADJUSTED: oral evaluation for a patie'. A 'Charge Details' section is expanded, showing 'Ins Claim' with a 'Create New Claim' button, 'Tooth/Quad' as 'Surface(s)', 'CDT Code' as 'D0145', and 'Provider' as 'Jon Barnes'. A comment at the bottom of the details section reads: 'Fee Changed - D0145 - \$71.00 to \$0.00 - testing \$0 functionality'. At the very bottom of the ledger, another transaction is visible: '10/04/2017 10/04/2017 D2950 core buildup, including any pins wher'.

We will soon start working on implementation of insurance estimation so that patient versus insurance responsibility can be accurately reflected in the account balance and walkout statements. Additionally, we will start work on workflow support for posting insurance payments to close the loop on the primary claims processing workflow.

## Optimizations and Fixes

The following fixes and optimizations have been also been added to Phoenix this week.

1. Fixed a bug in the Checkout Queue in which fee changes would interrupt the Charge Posting workflow.
2. Addressed an issue in the Post New Charges UI in which non-billable providers could be selected during posting.
3. Fixed some visual issues with the Patient Minicard in the Duplicate Patient Check workflow to avoid unnecessary scrolling.
4. Cleaned up some issues with the Treatment Plan List UI to remove the incorrect / blank provider column, as well as some additional UI layout improvements.
5. Location-based Treatment Plan Lists now only include those patients tied to the location by the default / preferred location setting in the Patient Record, helping to improve performance and align with user expectations.
6. Support for the location's Tooth Numbering Preference setting was added, so that patient charts represent and planning / posting rules adhere to the correct numbering scheme.
7. Cleaned up Correspondence Templates, removing the deprecated PostCard type.
8. Addressed an issue in which multiple instances of a claim could be inadvertently created.
9. The eServices Payer ID list was implemented in additional environments to support search and selection of an eServices Payer to associate with an insurance company.
10. Fixed an issue in which billable procedures were not claimed by default when posting new charges via the Checkout Queue.

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