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Phoenix Weekly Release 0.0.0.2242

Phoenix Online DPMS

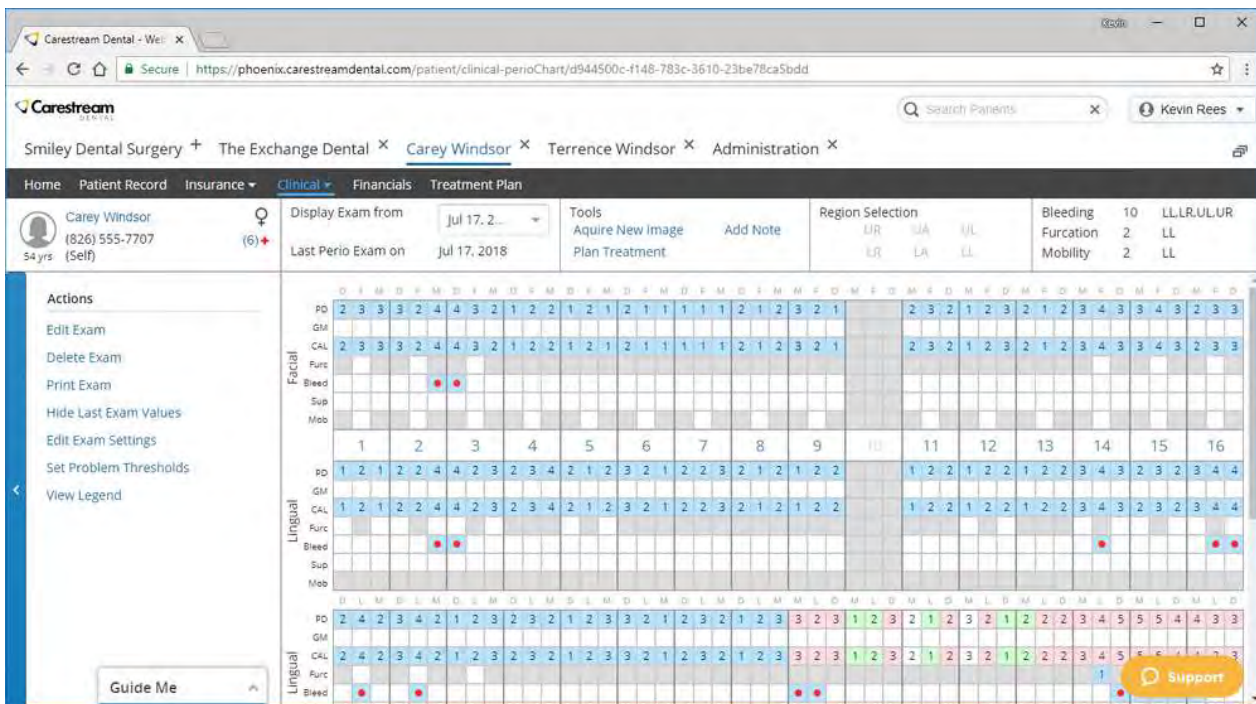
Weekly Release

Build 0.0.0.2242 | July 16th, 2018

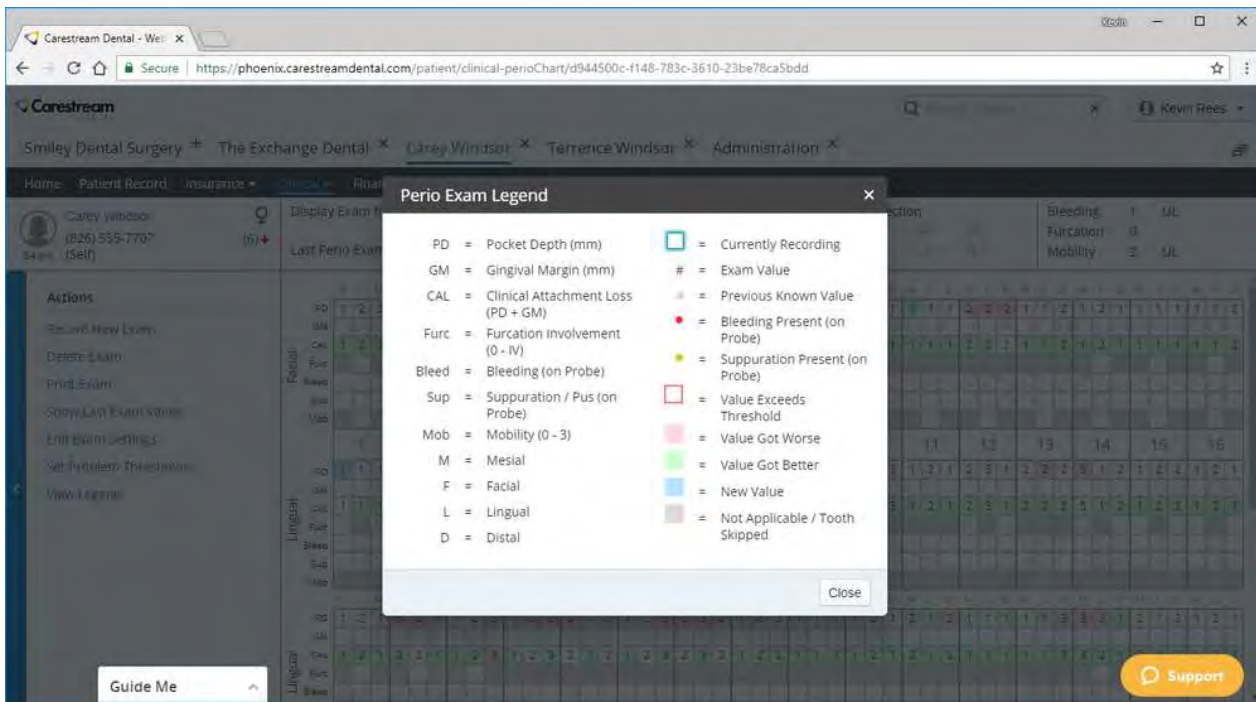
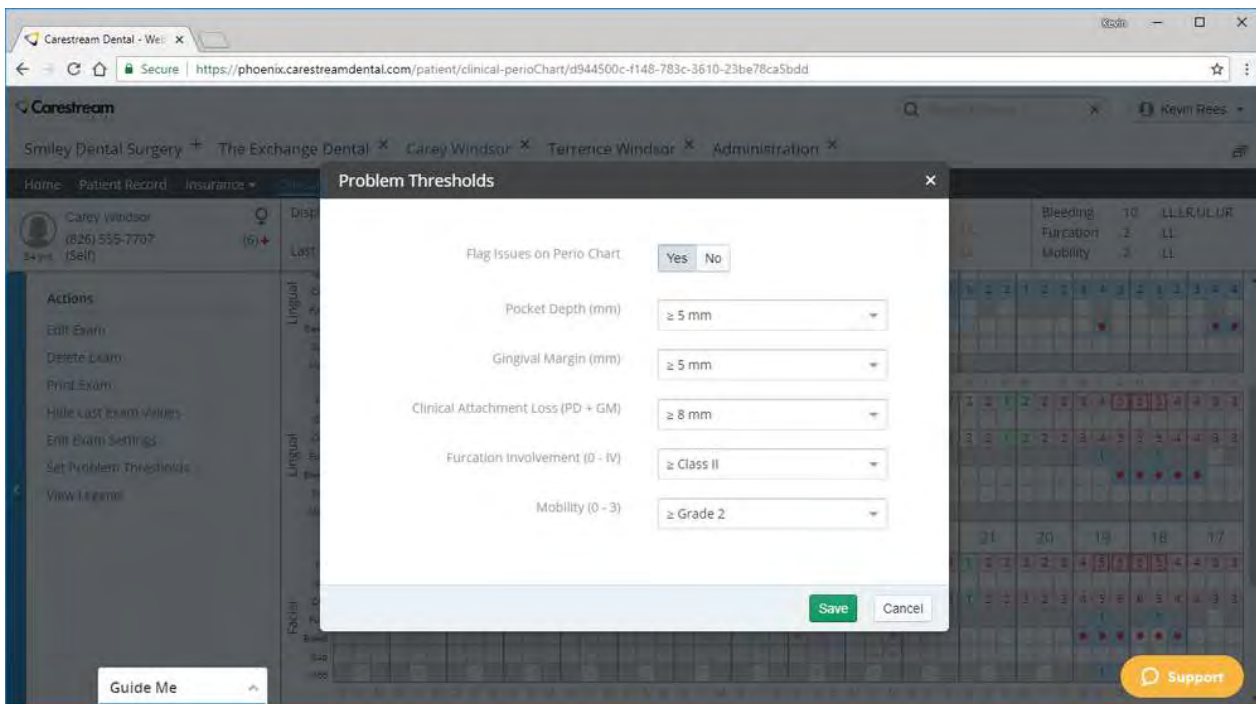
These are the highlights of the changes available in this week's Phoenix DPMS release.

Perio Exam Charting

This week's release contains the much-requested support for periodontal examination workflows. This includes the core workflows of recording new perio exams and reviewing existing / historical exam results. Users can now access the perio charting functionality by navigating on a Patient Tab to Clinical → Perio Chart. The latest completed exam will be displayed by default, along with the ability to review other past exams, start a new exam, print the exam in view, or even personalize the settings for what findings are deemed important or how future perio exams will be conducted by the provider (more on this below).



When reviewing existing exams, the application uses a simple visual design language and layout to make it easy for providers to quickly assess the patient's condition. Additionally, details like a summary of key clinical findings (presented in the upper right hand portion of the banner) and the ability to highlight meaningful values, increase the ease with which users can process the vast amount of information contained in the average perio exam. This helps to highlight the instances (along with the general anatomical location) of specific exam findings that the practice or user deems to be clinically relevant. In fact, users have the ability to determine which particular findings and values are important (and should be highlighted) when assessing the periodontal health of their patients. When set, any values that meet or exceed the defined thresholds will be visually highlighted - both during exam recording and in exam review - to make it easy to spot potential problem areas. A legend explaining all of the UI details, as well as the visual markup, is always available in a single click.

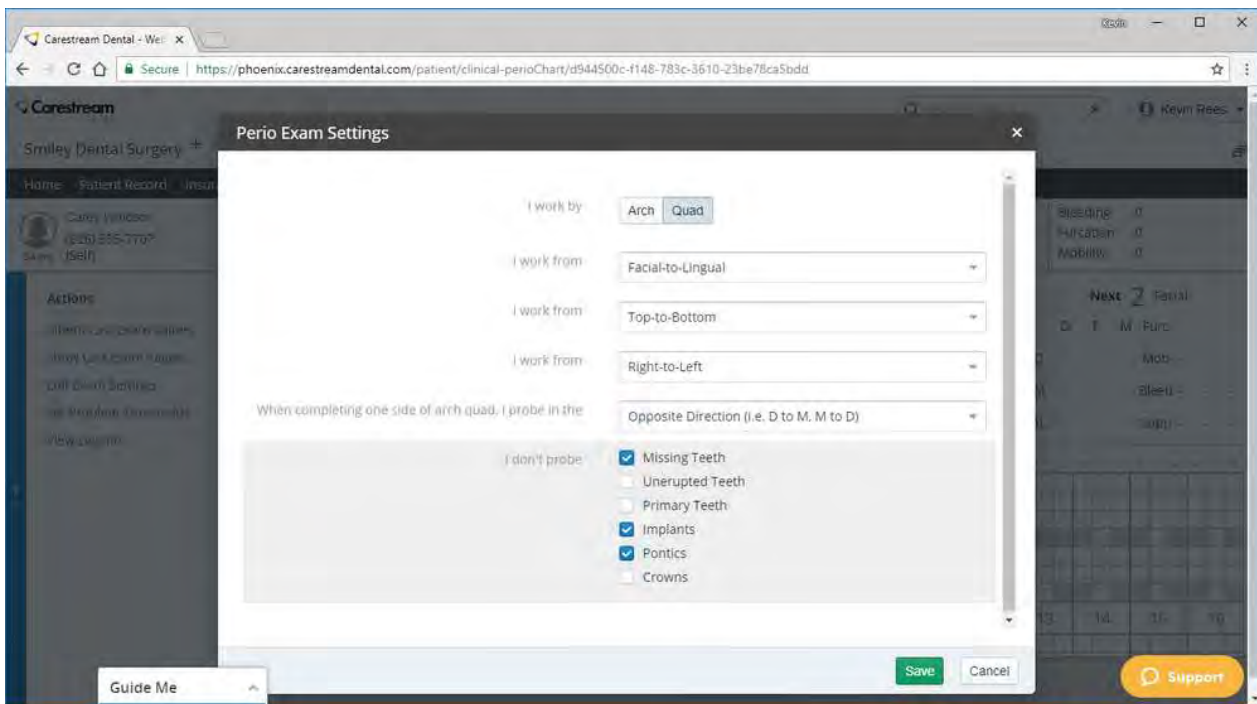


When recording a new perio exam, the application auto advances across the patient's mouth as pocket-based exam values like Pocket Depth and Gingival Margin are entered. Users can also record tooth-based findings such as mobility and furcation, as well as additional pocket-based findings such as bleeding (on probing) at any time during the exam. To help orient users to the patient's current condition, they can opt to view the previous exam values as they go, as well as highlighting those values that have changed since the last exam. This has been designed to help users be able to proactively examine certain areas more closely (or target areas for repeated examination).

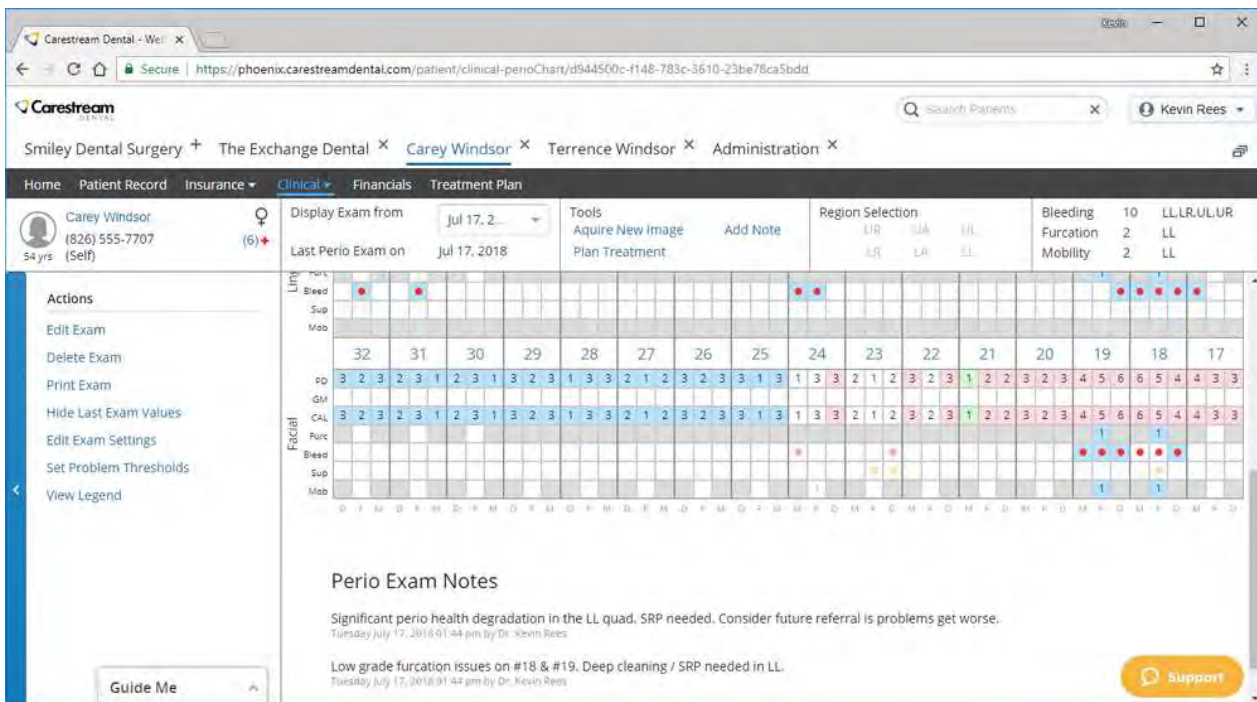
The screenshot displays the Carestream Dental software interface for a periodontal exam. At the top, the browser address bar shows the URL: <https://phoenix.carestreamdental.com/patient/clinical-perioChart/d944500c-f148-783c-3610-23be78ca5bdd>. The patient name is Carey Windsor, and the exam was performed by Dr. Kevin Rees on July 17, 2018. The interface is divided into several sections:

- Navigation:** Home, Patient Record, Insurance, Clinical (selected), Financials, Treatment Plan.
- Patient Info:** Carey Windsor, 54 yrs, (826) 555-7707 (Self).
- Exam Details:** New Perio Exam on Jul 17, 2018, Performed By: Dr. Kevin Rees.
- Tools:** Acquire New Image, Add Num, Plan Treatment.
- Region Selection:** IJR, IJA, IUL, IJR, IJA, ILL.
- Exam Settings:** Bleeding: 1 LL, Furcation: 0, Mobility: 0.
- Exam Progression:** Previous 23 Lingual, Current 24 Lingual, Next 1 Facial.
- Exam Grid:** A large grid for recording findings across different teeth and regions. The grid is color-coded by region: Lingual (blue), Facial (green), Furc (red), Bleed (yellow), Svp (orange), Mob (purple).
- Buttons:** Save Exam, Cancel, Support.

Users also have control over the exam progression, allowing perio exams to progress across the mouth in a way that supports their preferred workflow (e.g., by arch or quad, left to right, etc.). They can even specify anatomical conditions that they skip or do not record during exams so that the auto advancing will follow along with their natural workflow. Users also have the option to expedite repeated examinations, by importing the previous exam findings to inherit those values that haven't changed and then modify only those findings for which the patient condition has changed since last exam. These efficiencies have been designed into the application to help better support more personalized workflows and clinical practices, as well as saving time in the recording of perio examinations.



Lastly, users can also add notes to an examination, allowing for additional narrative details to be recorded as part of the exam record. Users can also print out an existing perio exam - with or without these notes - for use in patient communication, patient referral, or insurance claim support.



While this release contains core perio exam workflow support, additional work is to be completed on the integration of this functionality with hard tissue charting and appointment completion workflows. Primarily, this includes segways between the hard tissue chart and perio exam functionality, as well as the recording of new perio exams

when completing associated procedures from appointments. We look forward to receiving customer and stakeholder feedback on this initial version of perio charting and will enhance this functionality accordingly in future releases.

Workflow Enhancements to the Patient Record

Record

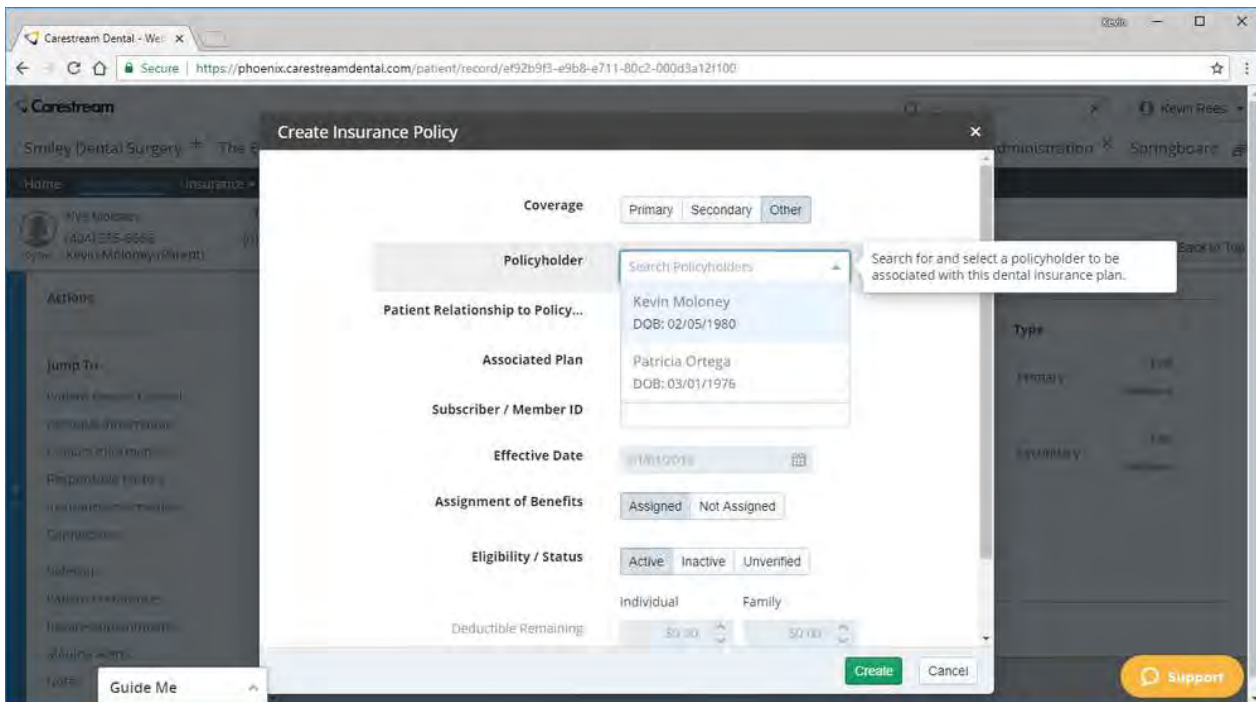
In addition to perio charting, this week's release also includes the previously discussed workflow enhancements to the Patient Record UI. Specifically, this includes significant design and workflow improvements to the creation and management of a patient's Responsible Parties and Insurance Policies. Many of these changes were made in response to feedback from early adopters that ran into some difficulty with defining new entities and people related to the patient when creating a new Patient Record.

The UI design been modified to make it much easier for the user to both review and digest this patient information, clearly listing out core details for the Responsible Parties and Insurance Policies associated with the patient. It is now very easy to identify (and modify) the patient's primary guarantor and emergency contact, as well as differentiating between the primary and secondary insurance policy at a glance. Additionally, users can now more easily create new people (records) to associate with patients using a consistent and limited subset of information. This makes it much easier for users to create new people, who aren't already patients in the system, to assign as responsible parties / guarantors or insurance policyholders. Once in the system, these people can be used throughout the application and associated with multiple patient records.

Responsible Party	Relationship	Guarantor	Emergency Contact
Kevin Moloney	Parent	★	☆
Patricia Ortega	Parent	☆	★

Policy Holder	Policy	Group #	Status	Type
Kevin Moloney	CSD Enhanced Metlife	555111000	Active (as of 01/01/2018)	Primary
Patricia Ortega	American Building Supplies Cigna Healthcare	93499	Active (as of 01/01/2018)	Secondary

Additionally, the logical linkage between insurance policyholders and responsible parties has been enhanced. For example, insurance policyholders are automatically added as responsible parties to the Patient Record (once the Patient Record is saved). Additionally, responsible parties that have already been added to the patient's list will be automatically suggested as possible policyholders when adding or editing patient insurance policies. Furthermore, insurance policies that already have a known association with a particular policyholder will be automatically suggested when that policyholder is used when adding insurance to another patient. Some of these small efficiencies will likely go a long way in easing user workflows with creating and managing Patient Records, especially surrounding the complex topic of insurance.



The screenshot displays the 'Create Insurance Policy' form within the Carestream Dental software. The form is overlaid on a patient record page for Kevin Moloney. The form includes the following fields and options:

- Coverage:** Radio buttons for Primary, Secondary, and Other.
- Policyholder:** A search dropdown menu with a tooltip that reads: "Search for and select a policyholder to be associated with this dental insurance plan." The dropdown shows two suggestions: Kevin Moloney (DOB: 02/05/1980) and Patricia Ortega (DOB: 03/01/1976).
- Patient Relationship to Policy...:** A text input field.
- Associated Plan:** A text input field with the value "Patricia Ortega" and "DOB: 03/01/1976" below it.
- Subscriber / Member ID:** A text input field.
- Effective Date:** A date picker set to 1/18/2018.
- Assignment of Benefits:** Radio buttons for Assigned and Not Assigned.
- Eligibility / Status:** Radio buttons for Active, Inactive, and Unverified.
- Deductible Remaining:** Two input fields for Individual and Family deductibles, both set to \$0.00.

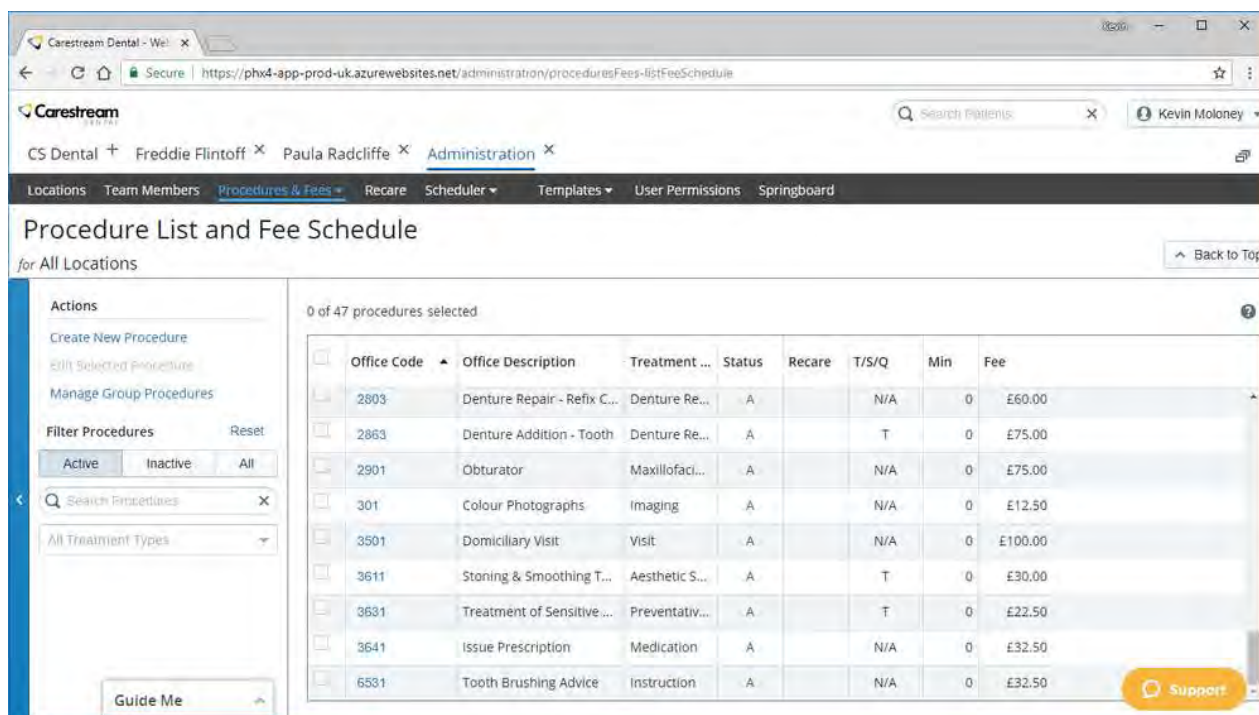
At the bottom of the form are 'Create' and 'Cancel' buttons. The background shows the patient record for Kevin Moloney with a 'Support' button in the bottom right corner.

We believe that these enhancements to the Patient Record will significantly improve the usability of these core patient management workflows. Creating and updating patient records will now be easier and some of the finer workflow enhancements should even result in some time savings and reduced workload. Upcoming releases will include similar design and workflow enhancements that cover the concept of "Connected Patients", which should help to support family-based patient management workflows that rely on connections between related patients.

Internationalization / Localization (UK Support)

Finally, this week's release also includes the initial implementation of the localization and internationalization framework. This has been implemented to accommodate the UK-based early adopters that will soon be using and testing Phoenix in their practices. In summary, this includes the contextually-aware removal of US-based functionality (e.g., items related to CDT codes and processing of insurance claims) and the use of UK standards and terminology.

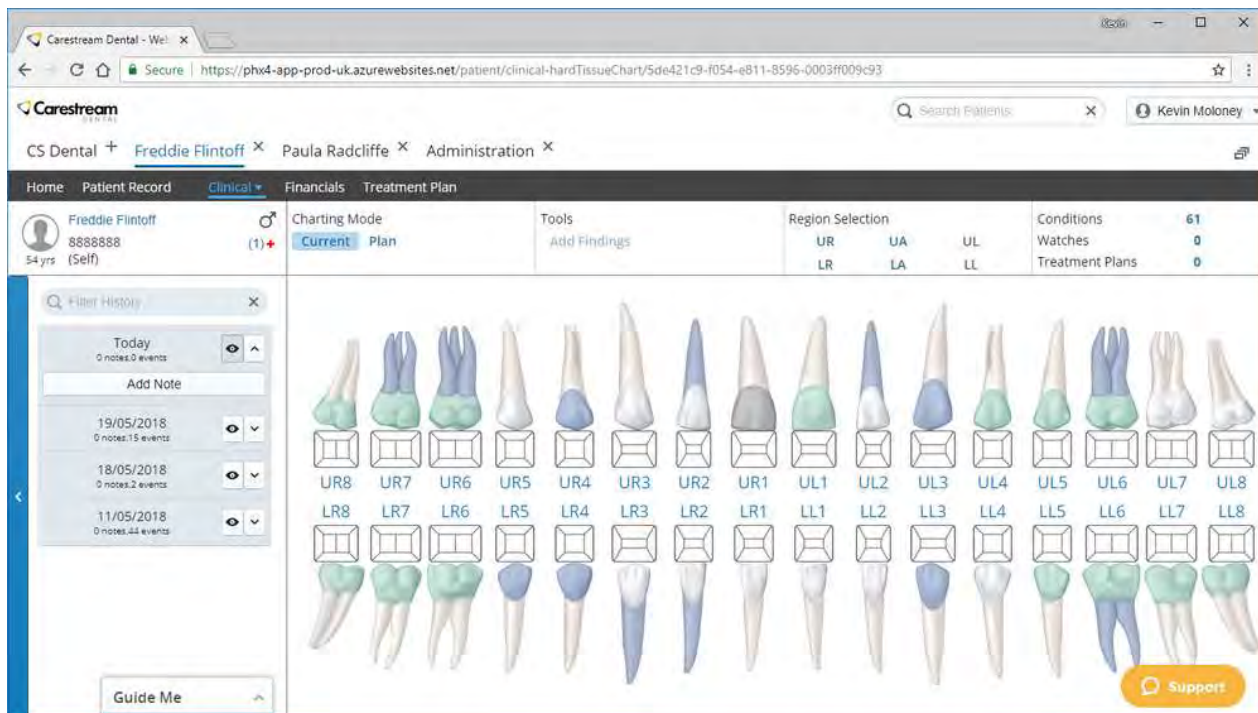
The largest change is the ability for the application to recognize when the customer is UK-based and adjust the application and its behavior accordingly. This includes the suppression of content and functionality specific to US-centric workflows, particularly those related to claims processing. For example, this includes modifications to Location and Team Member records to suppress various licensing and categorization fields. Additionally, this includes a revamp of the Procedure List & Fee Schedule, which now defaults to a UK-centric code base and suppresses the CDT / authority code functionality required for claims processing in the US (and also shows fees in the correct currency). And, of course, this also includes the suppression of the ability to currently submit insurance claims.



The screenshot displays the 'Procedure List and Fee Schedule' for all locations in the Carestream Dental application. The interface includes a navigation menu with options like 'Locations', 'Team Members', 'Procedures & Fees', 'Recare', 'Scheduler', 'Templates', 'User Permissions', and 'Springboard'. The main content area shows a table of 47 procedures selected, with columns for Office Code, Office Description, Treatment, Status, Recare, T/S/Q, Min, and Fee. The table lists various dental procedures such as 'Denture Repair - Refix C...', 'Denture Addition - Tooth', 'Obturator', 'Colour Photographs', 'Domiciliary Visit', 'Stoning & Smoothing T...', 'Treatment of Sensitive...', 'Issue Prescription', and 'Tooth Brushing Advice'. The fees are listed in British pounds (£).

Office Code	Office Description	Treatment ...	Status	Recare	T/S/Q	Min	Fee
2803	Denture Repair - Refix C...	Denture Re...	A		N/A	0	£60.00
2803	Denture Addition - Tooth	Denture Re...	A		T	0	£75.00
2901	Obturator	Maxillofaci...	A		N/A	0	£75.00
301	Colour Photographs	Imaging	A		N/A	0	£12.50
3501	Domiciliary Visit	Visit	A		N/A	0	£100.00
3611	Stoning & Smoothing T...	Aesthetic S...	A		T	0	£30.00
3631	Treatment of Sensitive...	Preventativ...	A		T	0	£22.50
3641	Issue Prescription	Medication	A		N/A	0	£32.50
6531	Tooth Brushing Advice	Instruction	A		N/A	0	£32.50

Additionally, the application now also reflects UK-based standards including currency, dates (day, then month), and various minor terminology updates. These changes are applied to both the live application UI, as well as the applicable reports and correspondence that can be generated. Additionally, a key change was made that applies to the clinical areas, allowing practices to now use the more familiar, modified-Palmer tooth numbering system (e.g., UR3, LL6, ULB, etc.). These simple changes will go a long way to facilitate the comfort and familiarity for those UK-based users.



While more full-scale accommodation is needed to fully support practices in non-US regions, these updates provide the basic framework to support those English-based, UK-centric workflows in a private or fee-for-service practice environment. Additional support for UK-specific practice management workflows, especially NHS-based treatment planning and claims processing, are planned for future releases. In the meantime, we look forward to expanding our customer base and getting even more feedback on the current state of the application.

Optimizations and Fixes

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

1. Added an ad / notification banner to the login screen to inform users about important, upcoming Carestream Dental products, events, and announcements.
2. Fixed an issue with the indices for Insurance Payers and Plans that was creating an issue for various API calls.
3. Updated the current migration service to conform to the updated data model used by the application.
4. Resolved an issue in which treatment items that were scheduled / added to an appointment were not being accurately represented in the patient's Treatment Plan widget.
5. Addressed a defect in which setting the policyholder for a patient insurance policy would reset the relationship value.
6. Fixed a problem with the date control in the Patient Record in which certain keystrokes would create an error.
7. Solved an issue in which the incorrect screen was being displayed as the default when the patient's clinical records are initially accessed.

8. Addressed an issue in which the Insurance Claims list was not getting automatically refreshed to reflect cancelled claims.
9. Resolved a defect in the Recare Settings fields in which the default recare procedures were generating an error on Save.
10. Fixed a defect in the Patient Record search controls in which certain characters were no longer being accepted as part of a search string.
11. Addressed a defect in which the completed status of posted treatment was not being accurately reflected for items in the patient's Treatment Plan.
12. Fixed a UI issue in which the completed indicator (e.g., green checkmark) was not being added to the Walkout Statement and Excuse Letter items in the Checkout Queue under some circumstances.
13. Resolved a UI issue in the Financial Daysheet in which the posted transaction details were not include the tooth / quad and surfaces details in some cases.
14. Fixed a defect in the Recall List UI in which adjusting the filter settings would sometimes result in an application error.
15. Addressed an issue with the Excuse Letter printing functionality in which additional page breaks / whitespace were being added to the generated letter output.
16. Resolved a defect in which Location records were allowed to be saved without having some required fields defined, resulting in errors upon save events.
17. Addressed a usability issue in which the schedule was not always defaulting to the current date upon application refresh or user log in.
18. Fixed an issue in which the patient's treatment plan was not updating appropriately when saving appointments containing treatment items.
19. Resolved a defect in which a backend error was occurring sometimes when adding a note to a pending appointment.
20. Addressed a defect in which the application would reload when the user would hit the Enter key after setting up a block of time for a time lock in the Schedule dayview.
21. Fixed an issue in which there were long application response delays when creating a new insurance claim from previously posted procedures.
22. Resolved a defect in which newly created Team Members were not available for selection in some usage contexts.
23. Fixed a defect in which invalid surface combinations were able to be assigned to teeth when planning, scheduling, or posting applicable procedures.
24. Updated the logic for the "Time Tracker" on the Schedule Dayview to accurately reflect the location's assigned time zone.
25. Corrected the visual classification of Furcation when charted in the Hard Tissue Chart.

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