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Phoenix Weekly Release 0.0.0.2485

Phoenix Online DPMS

Weekly Release

Build 0.0.0.2485 | October 1st, 2018

These are the highlights of the changes available in this week's Phoenix DPMS release. It should be noted that this week's release contains several Voice of Customer items that deliver on recent requests from customers that are actively using Phoenix to operate their practices.

Customer Onboarding & Upcoming Highlights

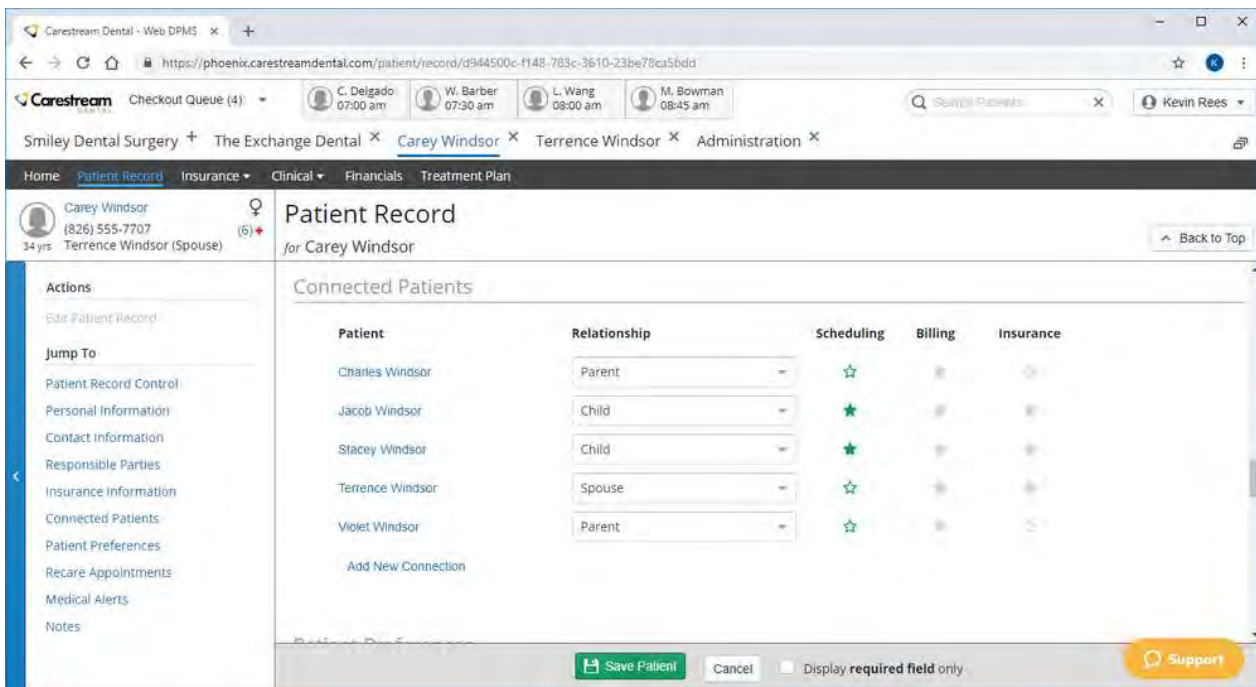
This week's release contains some significant advances in our ability to bring on new customers and Beta clients. This work improves our ability to quickly stand up environments for new customers and trial accounts, so that there is minimal delay between a customer expressing interest in and being able to login and test drive Phoenix. While much of this work is invisible to the end user, it is important to the team

as we continue to scale up customer involvement with the Phoenix program. This has been vital as we have been onboarding new Beta sites during our ongoing work at trade shows and with customer demos.

In upcoming releases, we will be rolling out the initial versions of several exciting and much-requested features in Phoenix. Users will soon be able to issue SMS-based appointment reminders directly from Phoenix, as well as receiving text-based confirmation responses from patients (for automated appointment confirmation). Users will also be able to scan documents and / or select files to upload and associate with Patient Records in Phoenix. Users will also soon be able to process card-based payments electronically, with the integration of Carestream Dental's new ePayments service. Finally, with the expansion of the initial integrated digital imaging functionality, users will now be able to review images directly in Phoenix, once they have been acquired via the image acquisition software (e.g., CSI) and uploaded to the cloud. These are all major advances for the Phoenix application and have been in the works for the past several months.

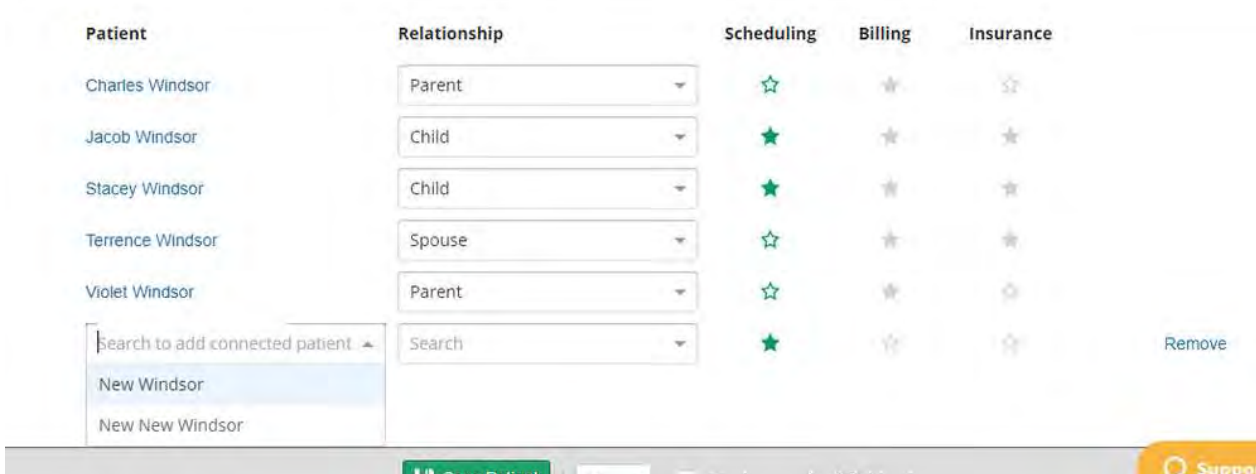
Enhancements to Connected Patients

The week's release also contains some long overdue enhancements to the Patient Record UI. This includes some design and workflow improvements to the creation and management of a patient's list of Connected Patients, which have been implemented in response to feedback from early adopters. This UI design has been updated to make it easier to review and manage those patients connected to the patient in context (e.g., family members). The new list of Connected Patients continues to be used for communication of balances, recare status, and treatment plans of related patients in various UIs throughout the application.



Patients with a shared guarantor will automatically share a “billing” connection, which may be used in the future for concepts like family-based accounts. Patients with a shared insurance policy (or policyholder) will automatically share an “insurance” connection, which may be used in the future for concepts like managing related insurance claims or policy-based claims management. These connections are automatically added on both sides (to both patients’ lists) without the need to manually search for and add family connections to Patient Records. Users can also mark existing Connected Patients as sharing a “scheduling” connection, which may be used for future concepts like family booking.

Connected Patients



Users can also manually add new Connected Patients to a Patient Record (if not automatically added through the aforementioned backend logic), with the system suggesting connections based on shared Patient Record information such as address. Once added, and the relationship defined, the recursive connection will automatically be

added to that connected patient's own Patient Record to close the loop without any additional work needed. We believe that these enhancements will not only improve the usability of the existing Patient Record and the related Connections functionality in the Patient Homepage, Patient Snapshot, and Patient Ledger, but also paves the way for future workflow optimization for family-based billing and appointment management.

Optimizations and Fixes

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

1. Addressed a bug in the insurance claim record generation that arises for certain carriers that have custom requirements when dealing with Type 2 NPI numbers.
2. Fixed a small bug in the A/R List UI that displayed an invalid value for patient that do not have any payment history.
3. Resolved a small defect in the Patient Walkout Statement in which the transaction date was being used in place of the service date for procedures.
4. Addressed a defect in the Insurance Policy functionality of the Patient Record in which the relationship to policyholder value would get reset to null sometimes after the policyholder name was defined or edited.

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