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CMP Weekly Release 0.0.0.3116

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.3116 | November 15th, 2018

These are the highlights of the changes available in this week's Care Management Platform (CMP) 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 CMP to operate their practices.

CMP at GOHS

This past weekend, the CMP team attended Carestream Dental's annual user conference - the Global Oral Health Summit (GOHS). The team spent time with customers giving product demos, showing off recent updates to workflow support (e.g., Cloud Imaging,



Appointment Reminders), and getting VOC (voice of customer) on some of the upcoming features and POCs (proof of concepts) that the team has been working on. This included the initial “Ortho CMP” POC, which was used to get early feedback in addition

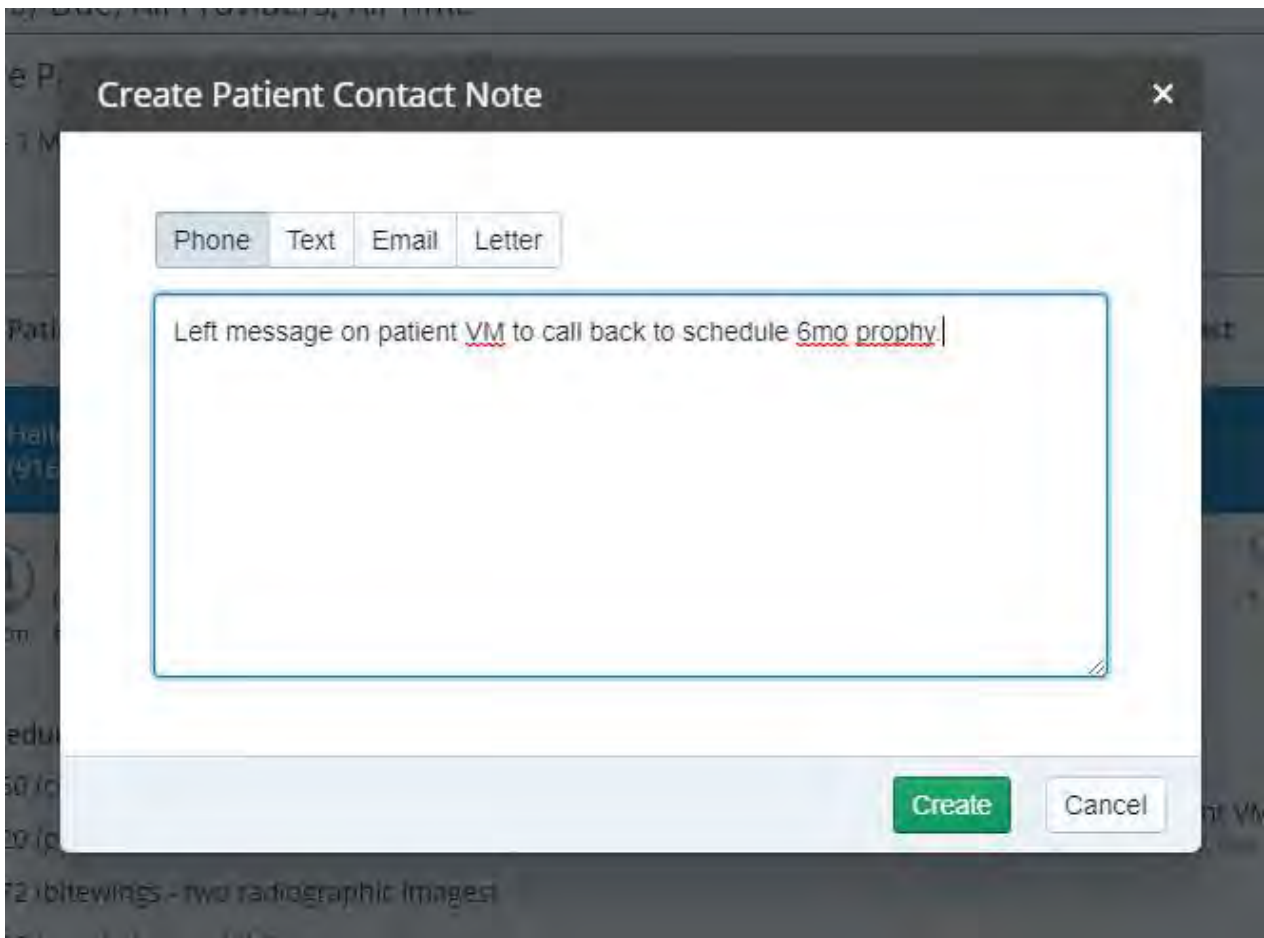
to recruiting a braintrust to guide our MVP vision. CMP was well received and there was a lot of interest in using the platform as an additional workflow support tool for existing DPMS customers. This includes the ability to use CMP to view appointment schedules, as well as providing insights into practice performance via the existing Springboard analytics modules. We will continue to enhance this functionality based on VOC and market interest received during GOHS this year.

Contact Notes in Recare List

This week’s release includes a requested update to the Recare List UI, allowing users to add “contact” notes to patients on the Recare List. This enhancement will better support collaborative workflows by allowing colleagues to communicate with one another about patient outreach efforts to schedule recare appointments for patients. To this end, a new notes control has been added to the Recare List UI, accessible by expanding a patient line item in the table (via single left click).

The screenshot displays the 'Recare List' interface for Smiley Dental Surgery. The page is filtered by 'Due, All Providers, All Time'. It shows three columns of patients due between different time intervals: 'Today - 1 Month (30 Days)' with 1 patient, 'Today - 2 Months (60 Days)' with 2 patients, and 'Today - 3 Months (90 Days)' with 6 patients. The first patient, Hailey Daniels, is expanded to show a detailed view. This view includes patient information (Hailey Daniels, 916) 555-8330, last recare date (Mar 10, 2019), and a list of procedures: D0150 (comprehensive oral evaluation - new or established patient), D0120 (periodic oral evaluation - established patient), D0272 (bitewings - two radiographic images), and D1120 (prophylaxis - child). There are buttons for 'Schedule Recare' and 'Print Letter' at the bottom of the expanded view. A 'Support' button is visible in the bottom right corner.

Once the line item is expanded, users simply left click on the “Add Note” control to access the Patient Contact Note control. Users first select the contact method (e.g., phone, text, email, or letter) and then enter any additional details about the contact event. Once created, the Contact Note will be linked to the patient and be displayed in the Recare List UI. This will allow multiple office personnel to effectively work the Recare List without accidentally recontacting patients about booking recare.



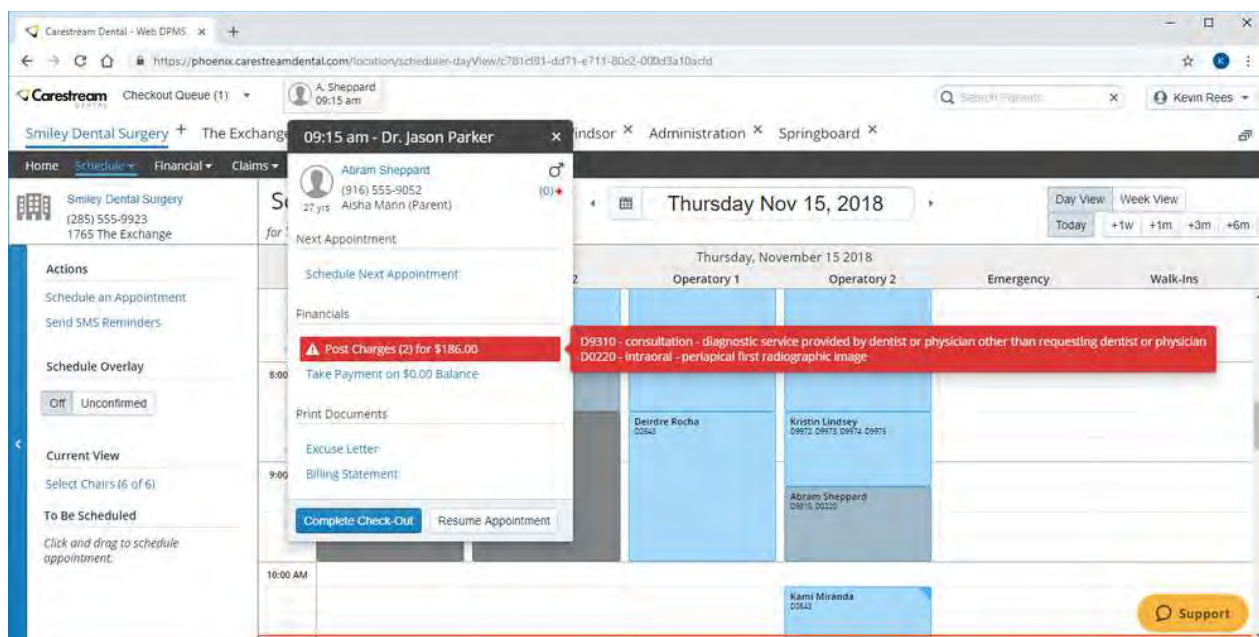
Patient	Due On Or After	Provider	Last Contact	Latest Note
<input type="checkbox"/> Hailey Daniels (916) 555-8330 (Home)	Mar 10, 2019 In 115 days (3 months) last recare Sep 9, 2018	Dr. Kevin Rees Mr. Mark King		Left message on patient VM to call back Contacted Via Phone • Thu, Nov 15, 2018 3:23
<input type="checkbox"/> Hailey Daniels (916) 555-8330 12y2m Evan Daniels (Parent)	♀ (0) +	Last Recare Mon, Sep 10, 2018 9:00 AM 65 days (2 months) ago		Medical Alerts (0) No Patient Medical Alerts
Procedures D0150 (comprehensive oral evaluation - new or established patient) D0120 (periodic oral evaluation - established patient) D0272 (bitewings - two radiographic images) D1120 (prophylaxis - child)		Notes Add Note Left message on patient VM to call back to schedule 6mo prophylaxis. Contacted Via Phone • Thu, Nov 15, 2018 3:23 PM • Kevin Rees		
<input type="checkbox"/> Lawrence Smith		Mar 11, 2019	Dr. Desmond Miles	

We will also be implementing a few additional enhancements to these contact note workflows that will further improve the user experience. This included a tighter integration with the existing Recare Reminder system used to issue bulk recare communications as well as a possible integration with the newly implemented SMS appointment reminder system. We are happy to deliver on another customer request coming from our early adopters.

Catching Un-Posted Charges

This week's release also includes some workflow enhancements targeted at preventing and/or recovering revenue from procedures that fail to get posted as charges to the Patient Ledger UI. Currently, this initial solution is two-fold, including some enhanced visual messaging in the Checkout Queue UI as well as a new "Post Charges" in the patient's Treatment Plan UI.

First, the Checkout Queue UI was visually enhanced to help prevent users from forgetting to post work, which was completed during today's appointment, during the checkout process. The "Post Charges" control is now visually highlighted in red to draw attention to the need to post today's work to the patient's ledger. This helps to make any unposted work more conspicuous during the back-to-front office transition that happens as part of appointment completion and checkout.



In the unfortunate case, however, that this is still overlooked, an additional enhancement was made to the patient's Treatment Plan UI that allows for users to post this completed work as new charges even after appointment checkout. Whenever work is completed during an appointment, but not posted, these charges will be reflected as "to be posted" in the Unmanaged Procedures list in the patient's Treatment Plan. The new "Post Charges" control will appear on the Unmanaged Procedures list, reminding users that completed work has yet to be posted. Clicking on this control will open the Post New Charges UI, allowing users to post the completed work to the patient's ledger. This control can also be used for instances in which Treatment Planned work was completed outside the boundaries of a scheduled appointment.

Treatment Plan for Abram Sheppard

UnManaged Procedures Post Charges (2) for \$186.00
5 Items Total Fee: \$532.00

Procedure	Tooth/Quad	Surfaces	Status	Date Added
D9310 consultation - diagnostic service provided by dentist or physician...			Completed Thu, Nov 15, 2...	Today
D0220 intraoral - periapical first radiographic image	14		Completed Thu, Nov 15, 2...	Today
D0120 periodic oral evaluation - established patient			Scheduled Wed, Nov 7, 20...	10/30/2018
D1110 prophylaxis - adult			Scheduled Wed, Nov 7, 20...	10/30/2018
D0210 Intraoral - complete series of radiographic images			Scheduled Wed, Nov 7, 20...	10/30/2018

Abram Sheppard - Post New Charges

Search for and select procedures to charge to Abram Sheppard's account. Checking billable items in the "Bill Ins?" column will automatically create a new insurance claim that will be submitted to General American.

Location: Power Ranch Practice
Service Date: Today

Bill Ins?	Code	Description	Tooth/Quad	Surface(s)	Provider	Amount
<input type="checkbox"/>	D9310	consultation - diagnostic service provided by de...			Dr. Jason Parker	\$150.00
<input type="checkbox"/>	D0220	Intraoral - periapical first radiographic image	14		Dr. Jason Parker	\$36.00
Total						\$186.00

No claim will be created upon posting procedures. Check the billable procedures above to create an insurance claim when posting.

We plan to further enhance this workflow by providing a “catch all” service in the patient’s Ledger UI, as with the existing functionality that enables users to create claims for work that has yet to be submitted to insurance. This new Ledger function, as well as some possible reporting modules, will provide practices with an ongoing accounting of earned revenue that was never realized. We look forward to providing enhanced workflow solutions to help ensure that practices optimize their financial operations.

Optimizations and Fixes

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

1. Fixed a bug that caused an application failure when adding a new Patient Connection via the Patient MiniCard.
2. Addressed a defect that resulted in a failure to upload panoramic radiographs into CMP when acquired and saved via CSI.
3. Resolved a bug that was interfering with the Imaging Bridge writing certain events to the log file, which created some upgrade issues when updates are made to the acquisition launcher.
4. Cleaned up an issue with phone number validation that would create errors if a patient record contained an invalid phone number.
5. Implemented a few small visual UI enhancement to the standard form-based dialog UI.
6. Resolved a defect which was preventing appointment and contact notes from being displayed on the Patient Home Page Notes & Contact History module.
7. Implemented a performance enhancement to improve the response time to appointment update events.
8. Implemented some workflow enhancements to the Patient Files functionality that allows users to move onto other work while larger files upload in the background.

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