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CMP Weekly Release 0.0.0.3349

# Care Management Platform (CMP)

Weekly Release

Build 0.0.0.3349 | February 4th, 2019

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.

New Waiting (Patients) Queue

This week's release includes some significant improvements to appointment handling workflows aimed at facilitating front-to-back-to-front office patient management. The first of these enhancements is the new Waiting Queue that can be selected as an alternative view to the Checkout Queue. Users now have the choice of which queue to display, depending on their role and primary interest. Once set, current view will be maintained until changed by the user. Designed for back office / provider personae, the Waiting Queue

displays the list of patients currently checked in for their appointments and waiting to be seated.
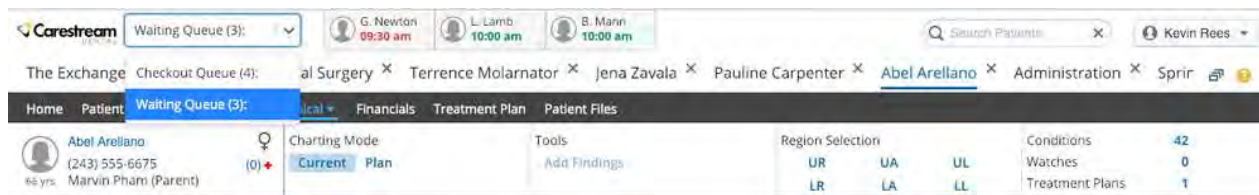

Once patients are checked in for their appointment at the user's location, they are automatically added to the Waiting Queue. The queue displays the patient's name and scheduled appointment time by default. Hovering over the patient in the queue will display some additional details about the patient's appointment including the assigned chair, associated provider, scheduled procedures, and how long the patient has been checked in. Additionally, the indicator of duration will visually change to red once the patient has been waiting for more than 5 minutes past the scheduled start time of the appointment.
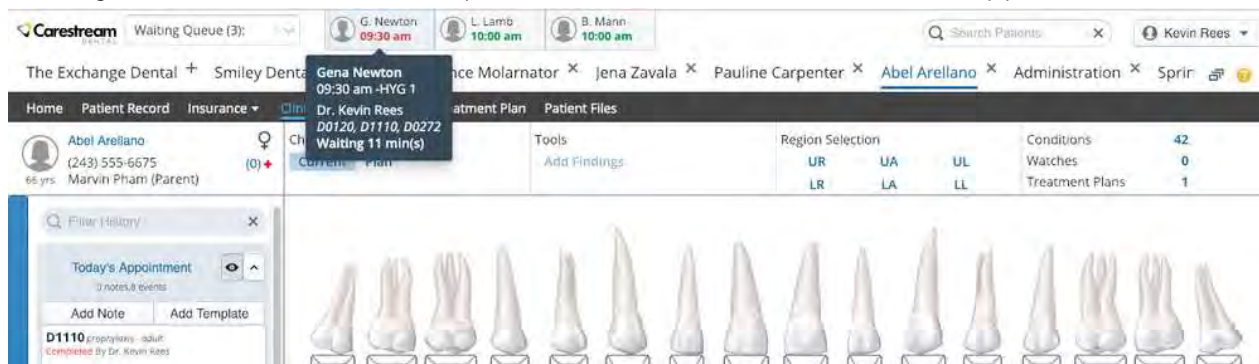
Clicking on the patient in the queue, providers a popover UI that provides additional contextual detail that allows providers to better orient themselves to the patient status and provide support for the most common workflows. In addition to the Patient Minicard (which also provides direct access to the useful Patient Snapshot UI), the details for today's appointment and the patient's last appointment are displayed. The user also has the ability to open the Appointment Card UI to review and/or modify any appointment details, review the patient's Hard Tissue Chart and clinical history, and seat the patient. By clicking "Seat", the patient's Patient Tab is automatically opened and the Hard Tissue

Chart is put into focus, allowing the provider to quickly orient himself and get the scheduled work underway.
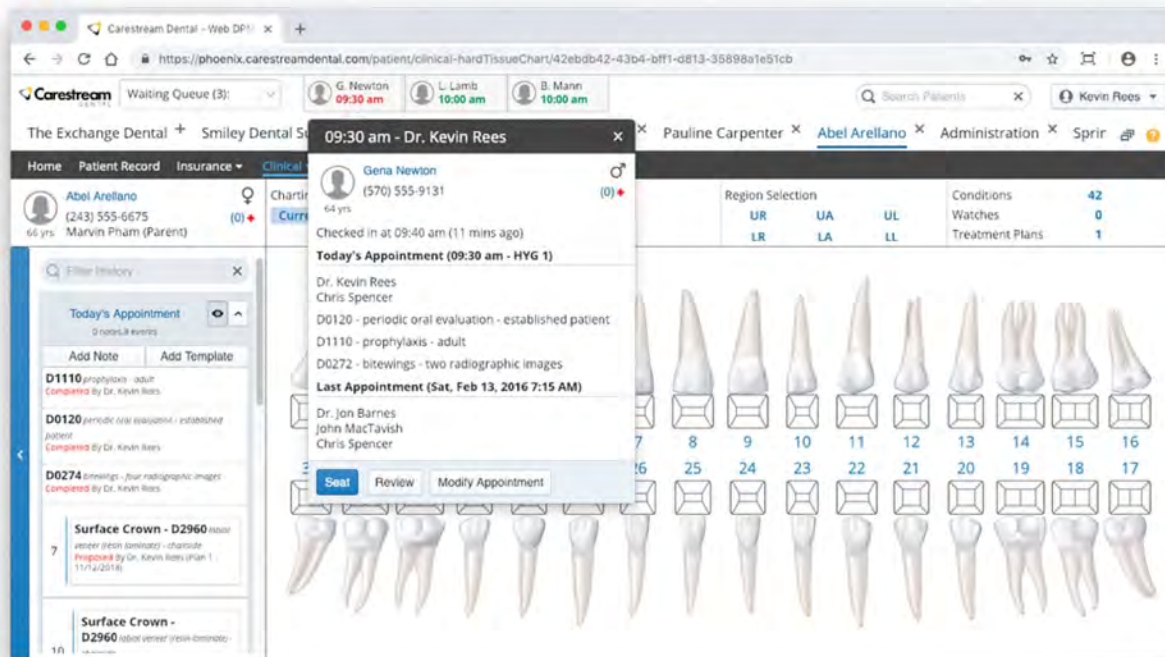

We believe that providers will particularly appreciate the new Waiting Queue, as it provides visibility in the upcoming schedule / appointments while remaining within their current clinical context (e.g., patient chart). This enhancement, in addition to those discussed next, should go a long way to improve awareness of the current conditions in the office. The Waiting queue prevents the need for additional communication on logistics and improves appointment handling workflows for providers without the need to leave a patient's chart (e.g., to view the schedule).

Appointment Management Enhancements

In addition to the aforementioned efficiencies provided by the new Waiting Queue, some additional appointment workflow enhancements have been added to the patient's Hard Tissue Chart UI. Providers now have the ability to easily review, modify, and complete the

scheduled clinical work in a single UI. This simple solution has been designed to significantly improve the usability of the provider's appointment completion workflow.
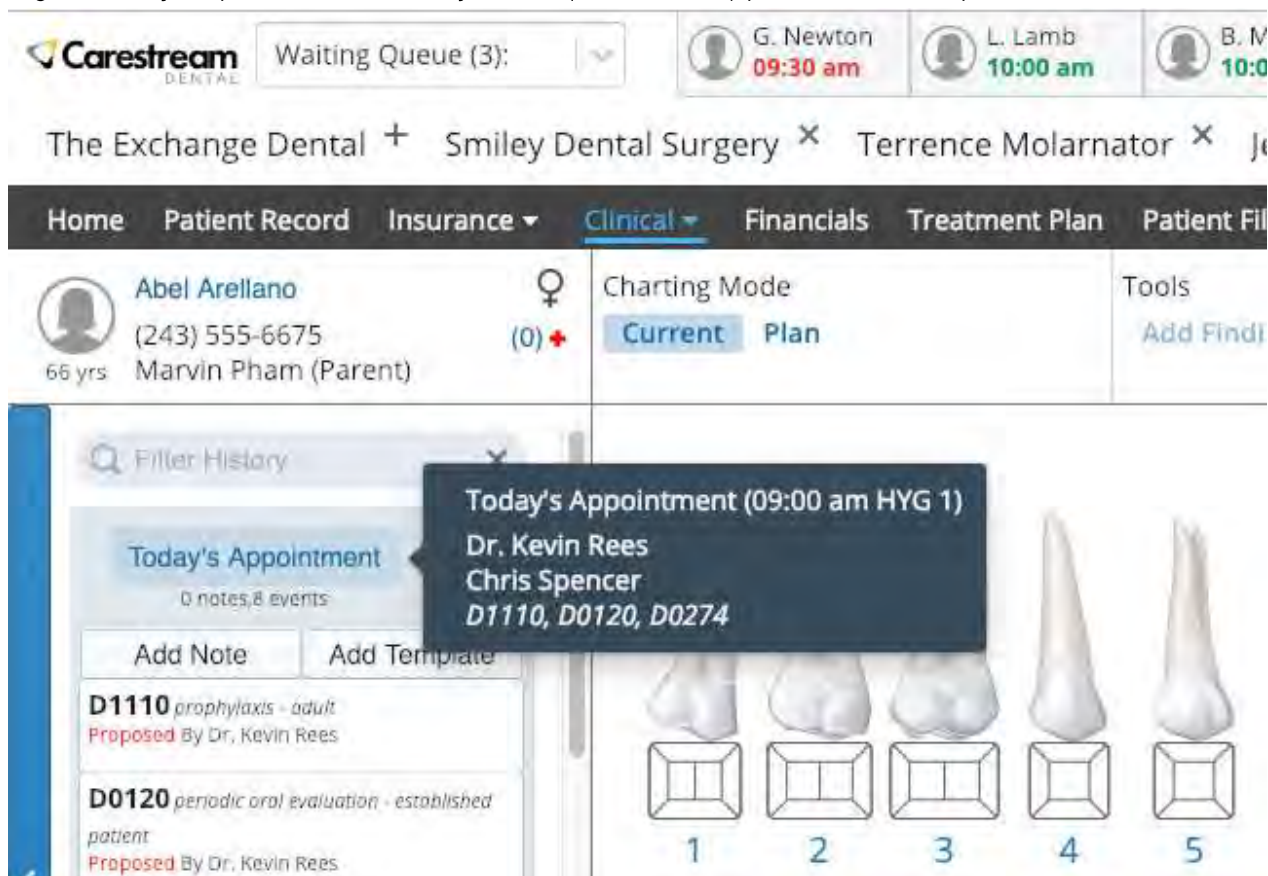
Clicking on the new "Today's Appointment" control in the side panel will open the "Manage Today's Appointment" dialog. This new UI gives the provider an overview of the appointment's scheduled procedures and gives the ability to easily manage the day's appointment in a single UI, directly from the patient's Hard Tissue Chart. The user can quickly complete the appointment in a single click, automatically charting all of the

scheduled procedures and updating the appointment status (and adding the patient to the Checkout Queue).
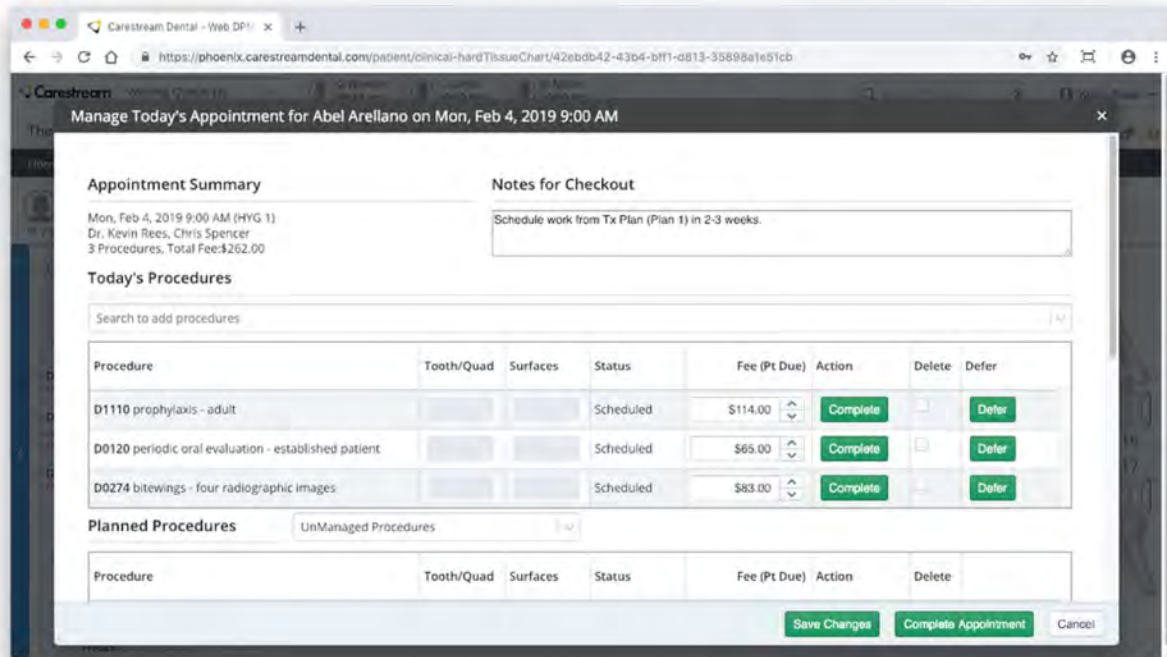
Providers can also easily modify the appointment's scheduled work, as necessary. Users can easily modify of the details for those procedures already scheduled, add any additional work completed today that wasn't originally scheduled, remove / delete any procedures that will not be done, or even even defer any scheduled work not complete today (which automatically adds it to the patient's treatment plan). Additionally, users can review a patient's existing treatment plans to discuss any outstanding treatment or even

add any planned work to today's appointment without needing to navigate away from the patient's current appointment.
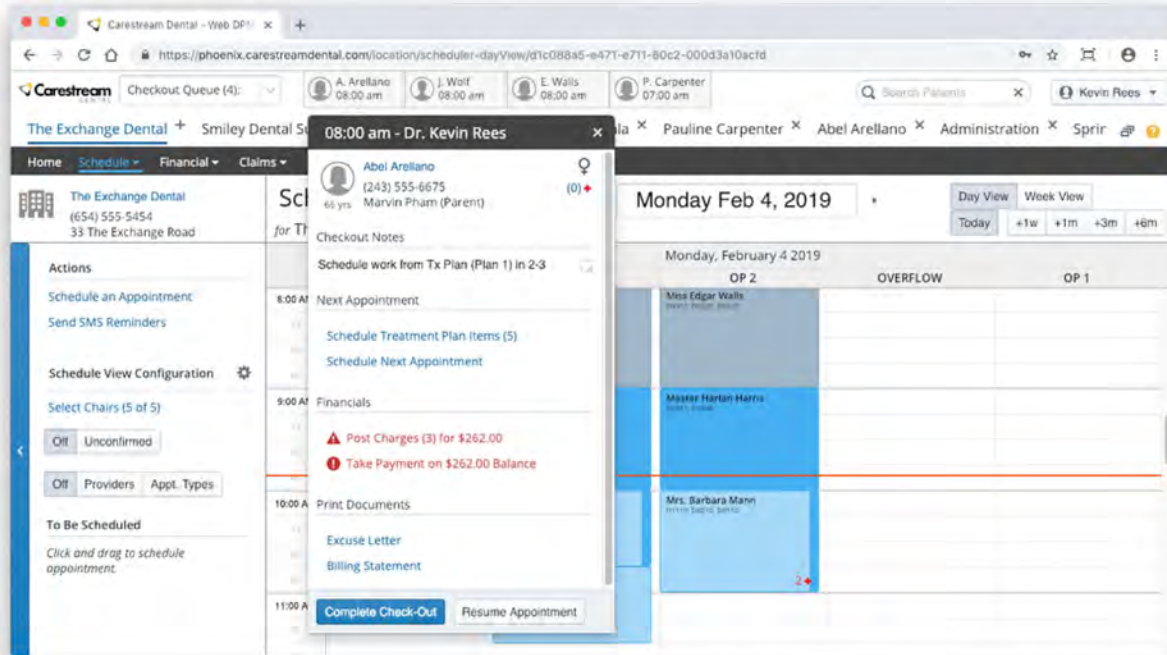
Finally, providers can also communicate additional relevant appointment details to the front office, such as instructions for scheduling the patient's next appointment. The "Notes for Checkout" space in the "Manage Today's Appointment" dialog allows users to convey any important messages, which will now be displayed in the Checkout Queue. This further eliminates the need for any manual routing slips or even the need for the provider to walk up with the patient to assist with checkout.

These improvements were aimed at making both the completion and modification (when necessary) of the scheduled procedures faster and easier, all from the patient's Hard Tissue Chart UI. The addition of "Checkout Notes" provides clinical users with the ability to communicate even more information with the front office, further enhancing appointment management workflows. We are excited to have users start taking advantage of these workflow improvements and give us feedback on how we can make the recurring tasks involved with appointment management even better.

Capturing Unrealized Revenue

Sometime unintended outcomes occur as a natural consequence of providing users with flexibility when completing workflows. One such instance that can occur in CMP is when users complete unscheduled or planned work outside the context of a scheduled appointment. When this occurs, the completed procedures - which would normally be picked up as part of the appointment checkout process - may go unnoticed and (as a

consequence) the revenue can go unrealized. To address this potential issue, this week's release also includes some key enhancements that help ensure that unrealized revenue is effectively managed.

Any unscheduled procedures that are completed on the same day as a patient's scheduled appointment, such as work completed directly from a treatment plan, are now automatically associated with the current day appointment. This is helpful when the user completes work outside of the context of the current appointment and its scheduled procedures. While the aforementioned enhancements provided by the new "Manage Today's Appointment" dialog should already help tie these workflows together, the system will now automatically handle these cases as well.

For instances in which users complete work outside of an appointment altogether (or even after the appointment is checked out), a set of new "Unposted Work" indicators have been added to the patient's Treatment Plan and Ledger UIs. In the patient's Treatment Plan UI, whenever a selected plan has completed work that has not yet been posted, there is a

new "Post Charges" indicator that display the number of as-yet-unposted procedures and their total value. Clicking on this link will open the Post New Charges dialog, allowing users to specify a service date (per procedure), modify the procedure details, bill insurance (as applicable), and post the charges to the patient's Ledger.

Similarly, any completed procedures that have not yet been posted are also picked up and accounted for in the new "Post Completed Work" indicator in the side panel of the Patient Ledger UI. Clicking on this link will open the Post New Charges dialog, where users can manage the posting of these charges to the Patient Ledger (or even uncomplete procedures that were accidentally marked as completed). This utility also covers instances in which patient appointments get checked out, but the completed procedures are not posted (for whatever reason).

We hope that these additions will prove useful to users for instances in which completed work is not posted right away for any reason. Based on customer feedback, we may further enhance this functionality to better communicate this potential revenue that is in "limbo".

Optimizations and Fixes

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

1. Users can now create new treatment plans directly from the Treatment Plan UI to better handle management of treatment planning without having to go to the Hard Tissue Chart UI.
2. Implemented significant performance improvements to the global patient search function, greatly improving the response time for databases with large patient record volumes.
3. Addressed an issue with the dropdown selection control (e.g., Payer selection for insurance) that was creating a usability issue when interacting with item selection from the list.

4. Per customer request, minors can now be assigned as policyholders to accommodate special insurance conditions in which the policy will be in the minor's name (such as special, State-sponsored programs).
5. To expedite clinical workflows and appointments, the default screen within the Clinical area of the Patient's Tab is the Hard Tissue Chart UI.
6. Resolved a defect in the Team Member record UI that was causing app stability issues when phone numbers were added or modified.
7. Addressed an issue in which the Taxonomy Code assigned to providers in the Team Member record UI would sometimes map to an alternate value when modified.
8. Fixed a bug in the Team Member record UI that was causing issues saving record changes when the State field of the address was modified.
9. Implemented various backend optimizations that greatly improve the performance and stability of the process of provisioning new client databases as well as upgrading existing databases.
10. Resolved a defect in which images would sometimes not automatically show up in patients' records in CMP following acquisition in CSI.
11. Fixed a bug in the Appointment Card UI in which changes to the allocated providers (doctor and hygienist) would sometimes not be saved.
12. Implemented various backend changes to support NEA claim attachments in anticipation of the upcoming integration with NEA FastAttach.
13. Per customer request, the relationship field in the Responsible Parties, Insurance Information, and Connected Patients is now searchable to make it easier to find and select relationship type when defining new relationships for a patient.
14. Addressed a UI defect in the Claim Summary screen in which there were overlapping or occluded data elements under certain conditions.
15. Fixed a defect that would sometimes cause an application failure when attempting to book an appointment for a Connected Patient.
16. Resolved a bug in which saving updates to a Patient Record would sometimes fail under certain usage contexts.

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