⬛ᴹᴼᴰ kevin_moloney
Moderator

05-01-2019 01:04 PM

CMP Weekly Release 0.0.0.3735
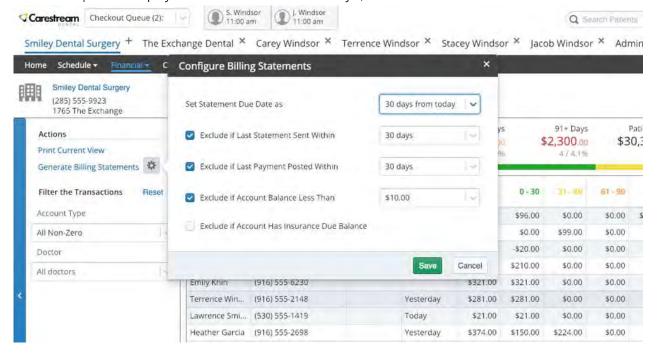# Care Management Platform (CMP)

Weekly Release

Build 0.0.0.3735 | May 1st, 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.
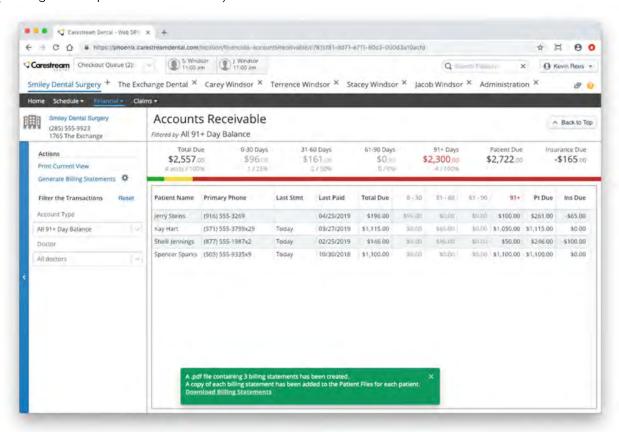
Bulk Statement Generation

Per several customer requests, this week's release includes support for generating bulk billing statements. This includes support for the definition of statement generation rules (to determine which selected subset of patients apply) as well as the tracking of statement issuance per patient. When users generate a batch of billing statements via the Accounts Receivable (A/R) UI, CMP generates a composite .pdf - with summary report - that can be printed for distribution to the associated patient accounts. Additionally, a copy of each individual statement, included in the batch, is added to each patient's Patient Files records.

Clicking on the "cog" icon in the side panel of the A/R UI allows users to define the current practice rules for which patient accounts are included (or excluded) in the batch run of statements. This includes rules and settings such as defining the due date, excluding accounts that have been issued a statement within the last X days, excluding accounts that have posted a payment within the last X days, and so on.
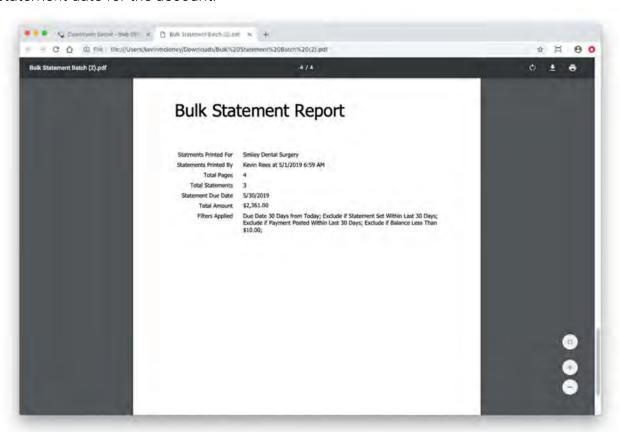

Users can generate batch statements by clicking on the new "Generate Billing Statements" actions in the side panel of the A/R UI. This will generate a .pdf for the patient accounts currently in view - based on the filtering currently applied to the A/R list - and subject to the configuration rules applied, as described above. Once the file is ready, a system notification will inform the user of its availability for download. The "Last Stmt" value displayed in the A/R UI will be updated accordingly for all patient accounts included in the batch run and a .pdf copy of each statement will be added to each patient's Patient Files repository. This is also true when a one-off statement is generated for a patient account

via the Patient Ledger UI or through the A/R UI when a specific patient has been selected (through an expanded table item).

As mentioned above, this will generate a composite .pdf file with all of the applicable patient account statements, followed by a summary report which details the total number of accounts and pages included in the printout, as well as the total being billed in the generated statements and a summary of the inclusion / exclusion rules applied. Each

individual patient account statement will include any posted transactions since the last statement date for the account.

Along with the statement formatting improvement discussed below, this release will improve the workflow support for the billing practices of current CMP customers. Users are now able to regularly generate account statements and, along with the formatting improvements, more easily distribute them via mail. We look forward to receiving user feedback and making any additional enhancements requested to further improve billing activities and workflows.

Statement Modifications

As an extension of the bulk statement handling work that was done, this week's release also includes several enhancements to the statement format and content, including several specific customer requests. This includes the addition of future scheduled appointments for both the primary patient (associated with the statement) and any Connected Patients defined in the Patient Record. It also includes details such as the Due Date (for account statements), additional procedure detail such as tooth, surface, and provider name (as applicable), and additional payment details (as applicable). This also includes a more accurate accounting of insurance-based balances. Lastly, the general layout and formatting of the statements has also been adjusted to more easily

accommodate distribution via standard windowed-envelopes (when printouts are tri-folded).

Smiley Dental Surgery
1765 The Exchange
Marrietta, GA 30339
(285) 555-9923
Inquiries@smileydentalsurgery.com | www.smileydentalsurgery.com

Statement

Wednesday, May 1, 2019

Due Today	**$200.00**

Today's Charges	**$453.00**
Today's Payments	**$0.00**
Transactions as of	**5/1/2019**

Jacob Windsor c/o Terrence Windsor
6523 Joens Way
Placerville, CA 95667

Transaction History

Date	Svc Date	Description	Charges	Payments	Balance
		Previous Balance			$0.00
5/1/2019	4/30/2019	[D1206] topical application of fluoride varnish - Jon Barnes	$96.00		$96.00
5/1/2019	4/30/2019	[D1120] prophylaxis - child - Jon Barnes	$134.00		$230.00
5/1/2019	4/30/2019	[D0272] bitewings - two radiographic images - Jon Barnes	$108.00		$338.00
5/1/2019	4/30/2019	[D0120] periodic oral evaluation - established patient - Jon Barnes	$115.00		$453.00
		Current Balance			$453.00

Future Appointments

Jacob Windsor	11/1/2019 @ 10:00 AM
Carey Windsor	6/5/2019 @ 1:45 PM
Terrence Windsor	8/27/2019 @ 2:00 PM
Stacey Windsor	11/1/2019 @ 9:00 AM

Treatment Plan Modifications

In response to several customer requests, the treatment plan printout has also been enhanced. When printing out a patient's treatment plan (or any subset of selected items from the patient's planned work), the .pdf output now includes additional information on the patient vs. insurance due breakdown, as well as a generic disclaimer and a signature line. This was done to support workflows involving the presentation of a treatment plan proposal / estimate to a patient and collection of a signature of patient acceptance (or rejection). CMP users can then, as necessary, scan the signed document and upload it to the patient's Patient Files repository to maintain treatment records. The treatment plan printout's layout and contextual information (such as the addressee and some treatment plan details) has also been enhanced, in line with the previously mentioned improvements

to the account statements, to allow for easy mail-based distribution in standard windowed-envelopes.

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Treatment Plan

Wednesday, May 1, 2019

Total	**$1,051.00**
Patient Due	**$367.85**
Estimated Insurance	**$683.15**

Carey Windsor
872 White Second Street
Austin, VT 81364

Crown + Restoration for Carey Windsor

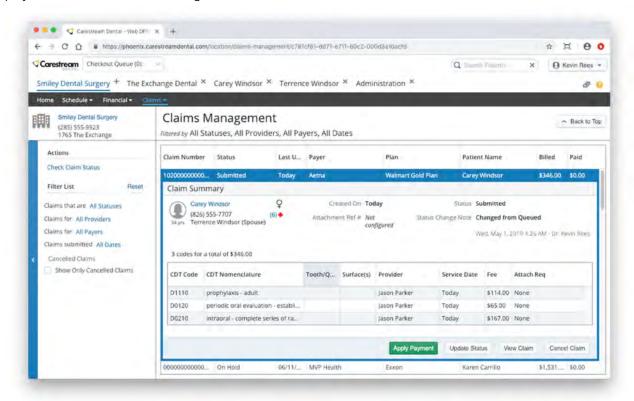| Procedure	Status	Fee	Pt. Due	Est. Ins.
D2663 - onlay - resin-based composite - three surfaces #12 MOD	5/1/2019 (Proposed)	$110.00	$38.50	$71.50
D2750 - crown - porcelain fused to high noble metal #13	5/1/2019 (Proposed)	$754.00	$263.90	$490.10
D2950 - core buildup, including any pins when required #13	5/1/2019 (Proposed)	$187.00	$65.45	$121.55
	Total	$1,051.00	$367.85	$683.15

DISCLAIMER: Estimated Insurance is only an ESTIMATE and not a guarantee of coverage. Patient / Guarantor is financially responsible for all costs / balances not covered by insurance.
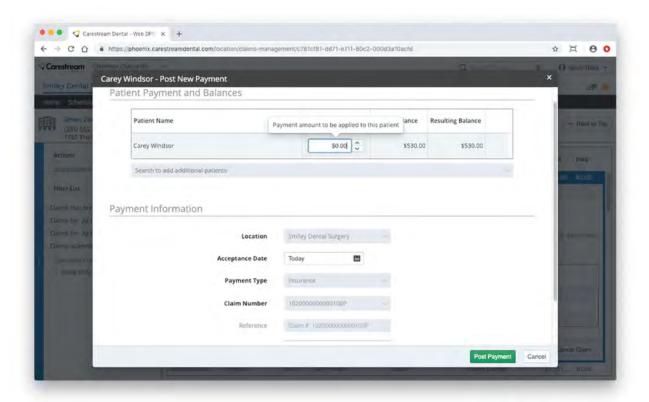
Check One: ☐ Accepted   ☐ Declined

_____   _____   _____
Signature   Printed Name   Date

Insurance Payments Against Claims MVP

Lastly, this week's release includes an initial version of support for posting a payment against a specific insurance claim. Users can now click on the "Apply Payment" button in the Claim Summary UI for a selected claim (e.g., an expanded list item in the Claims Management UI) to post a payment against the claim. This will automatically open the Take Payment dialog, with the associated patient and claim information already imported
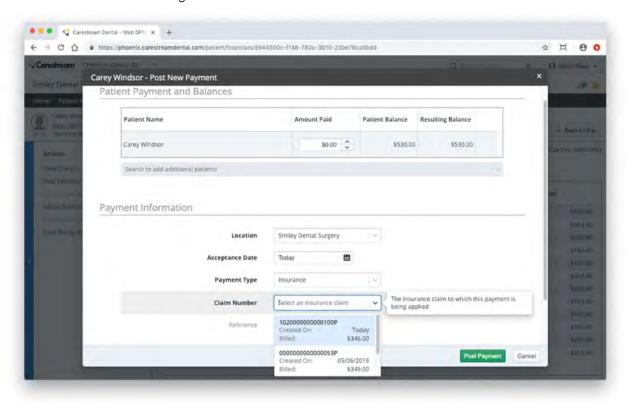
into the payment record. The user must simply enter the payment amount and post the payment to the Patient Ledger.
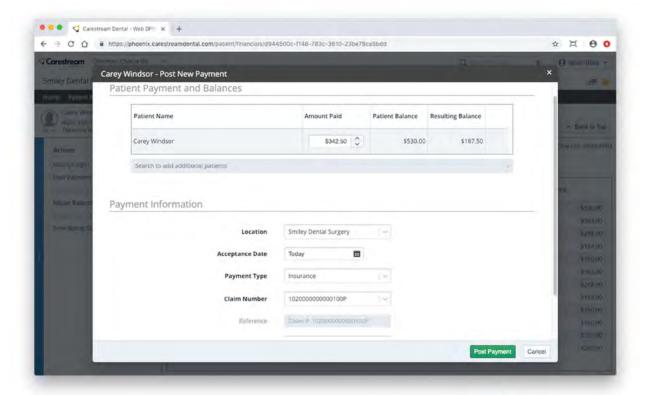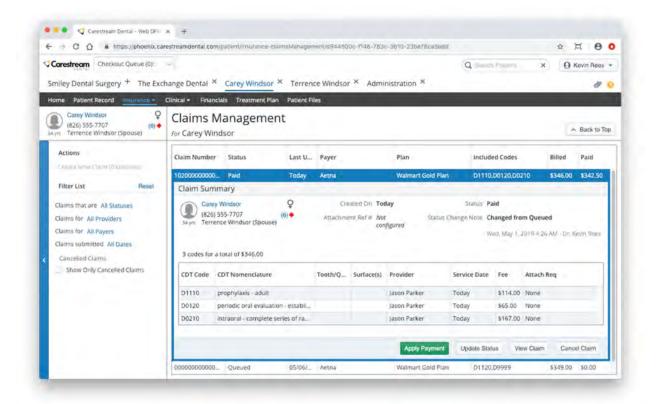

Users can also perform this workflow directly via the Patient Ledger UI when taking a new payment by selecting "Insurance" as the payment type and then using the new Claim Number search to select a claim to associate with this payment. Known / existing patient

insurance claims will automatically be suggested for selection without even having to execute a search. When the claims-linked payment is posted, the associated claim record status will automatically be updated, as will the record of what has been paid against the claim in the Claims Management UI.
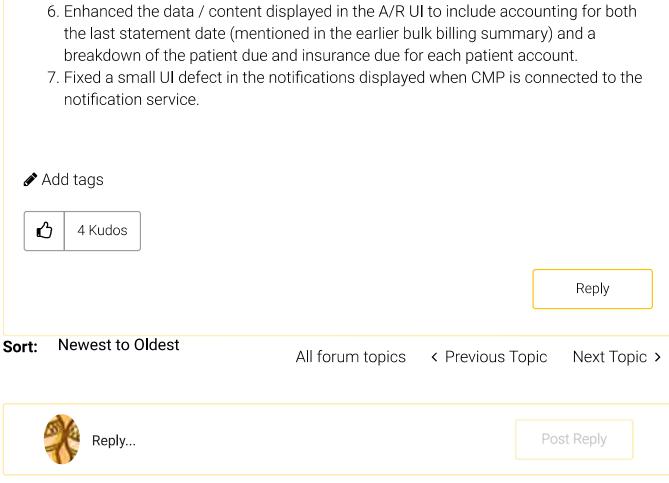
We acknowledge that this is merely a first, small step towards a more robust solution of handling insurance payments. While CMP does not yet accommodate the handling of bulk remittance advice (e.g., one payment towards several, batched claims) or the finer tracking of specific payment and writeoff amounts by procedure (e.g., line item accounting), it does improve the current workflow for both posting an insurance payment and tying it to a specific claim. Proper handling of insurance payments, including management of bulk remittance advice, will come in a series of releases following the implementation of our revised accounting system.

Optimizations and Fixes

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

1. Resolved an issue that would sometimes produce an error when trying to print out the filtered A/R report (.pdf generation error).
2. Addressed a UI defect in the A/R and Patient Ledger UIs in which some aged balances were being incorrectly displayed.
3. Fixed a technical issue in which some CDT codes were being assigned an incorrect treatment subtype, which resulted in incorrect anatomy detail requirements when scheduling, planning, or posting the associated procedures.
4. Based on several customer requests, the saturation was increased for the colors used to visualize charted events in the Hard Tissue Chart UI to make the chart easier to read under non-optimal lighting conditions.

5. Resolved a bug that results in procedures sometimes being shown as eligible for submission on an insurance claim, even when the service date falls outside of the active / effective period for the patient's insurance policy.
6. Enhanced the data / content displayed in the A/R UI to include accounting for both the last statement date (mentioned in the earlier bulk billing summary) and a breakdown of the patient due and insurance due for each patient account.
7. Fixed a small UI defect in the notifications displayed when CMP is connected to the notification service.

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