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## CMP Weekly Release 0.0.0.3840

# Care Management Platform (CMP)

## Weekly Release

Build 0.0.0.3840 | July 12th, 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.

### Patient Prescriptions v1

This week's release includes the initial solution for handling the creation and management of printed prescriptions. CMP users can now generate and print prescriptions for patients, allowing providers to cover additional patient care workflows while maintaining the documentation for these medication orders directly in CMP. This includes the creation of prescription templates for efficient generation of common orders, easy reordering / regeneration of an existing patient prescription, and special handling of controlled substances (e.g., Schedule II drugs).

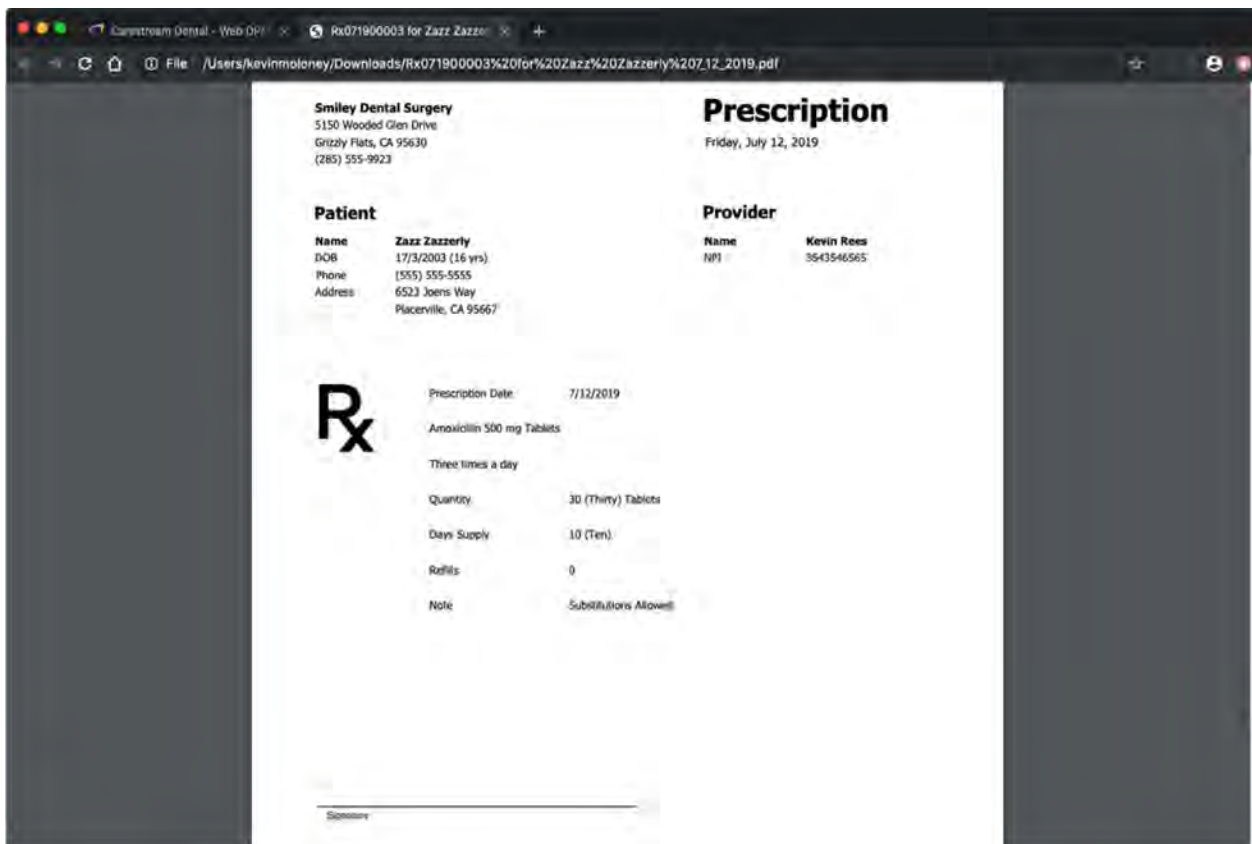
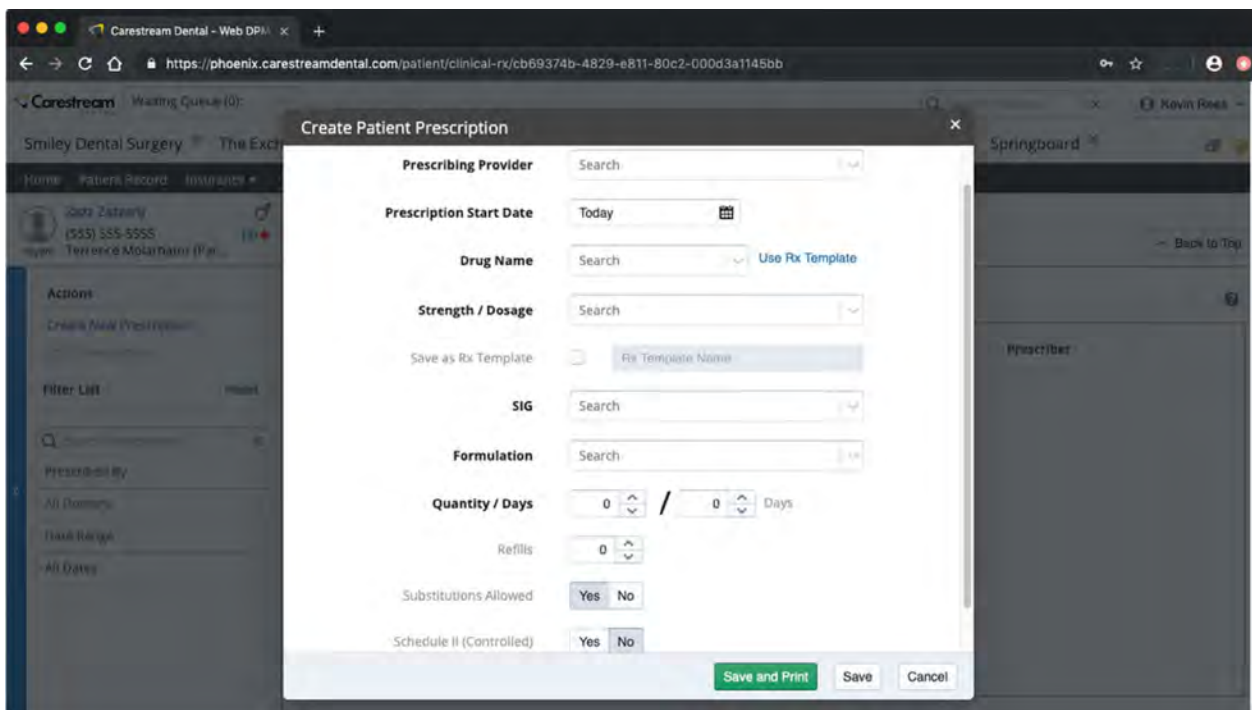
To generally accommodate the various State-based prescribing rules, some new fields have been added to the Team Member Settings UI (User Menu → Administration → Team Members). State License Number and DEA Number, both allowing for multiple State affiliations to be defined, are now available in the doctor's record. This additional provider information will be printed on the prescription, by default, when generating prescriptions involving controlled substances.

The screenshot shows the 'Team Member Settings' page for Dr. Kevin Rees. The 'Professional Information' section contains the following fields:

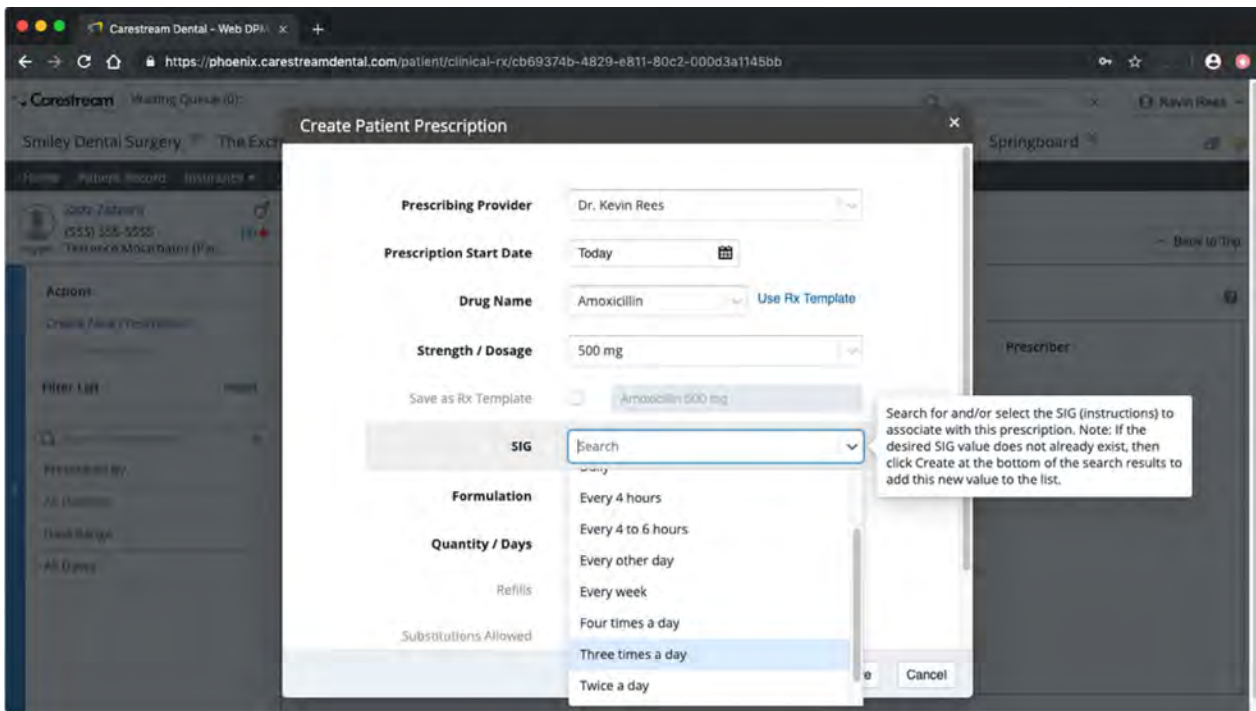
Default Location	Smiley Dental Surgery
Role	Doctor
NPI Number	3543546565
Taxonomy Code	Dentist (122300000X)
State License Number	567890 CA
DEA Number	CM1234567 CA

Buttons: Add State License, Add DEA Number, Save Team Member, Cancel, Display required field only.

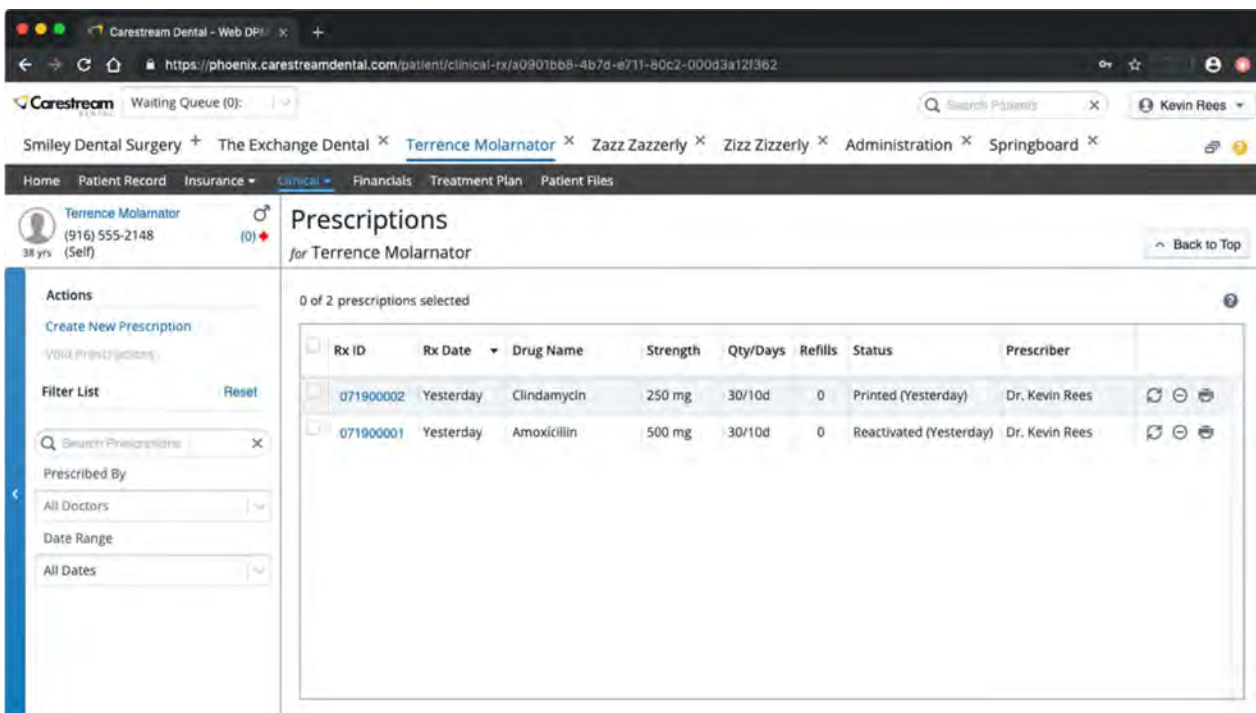
Patient prescriptions are both created and managed via the new Prescriptions UI within a patient's clinical history (Patient Tab → Clinical → Prescriptions). Simply click on "Create New Prescription" in the side panel actions and start defining the medication order details. From here, the user assigns the prescribing provider (from the list of available doctors), the start date (defaults to today), and the remaining prescription information (e.g., Drug Name, SIG, formulation, quantity, and various other bits). Once all of the required fields are defined, then the user can save and print the prescription. CMP currently allows for the printing in a commonly-accepted, standard format - accommodating both common prescriptions as well as those involving controlled substances (e.g., Schedule II). As with other documents in CMP, such as billing statements, a .pdf will be generated when printing a patient prescription.



To ease the prescription generation workflow, CMP comes ready with a subset of common values for medications, dosages, and other variables. As with other areas in CMP, users can easily expand these lists of values (à la medical alerts), adding new drug names, dosage values, instructions (SIGs), and formulations. These flexible lists, along with their pre-existing values, and the ability to create and use templates - discussed below - should help expedite the creation of both new and commonly issued drug orders.



A list of issued prescriptions can be managed for each patient, providing users with the ability to void (or reactivate), reorder (create new), and re-print existing prescriptions. This can be done via the button controls on the right-hand side of the prescription record or via the Manage Prescription popover UI displayed when clicking on the Rx ID hyperlink control. Voiding a prescription will prevent its further printing, but can be reactivated (and printed) in the case of an error. The latest status of the prescription will be recorded and displayed in the patient's Prescriptions list and in the Manage Prescription popover details, including audit trail information for the last time the prescription was printed. Finally, the Prescriptions list can be searched and filtered to find specific prescriptions for patients with a long medication order history.



Smiley Dental Surgery + The Exchange Dental x Terrence Molarnator x Zazz Zazzerly x Zizz Zizzerly x Administration x

Home Patient Record Insurance Clinical Financials Treatment Plan Patient Files

Terrence Molarnator  
(916) 555-2148  
38 yrs (Self)

## Prescriptions

for Terrence Mola

0 of 2 prescriptions s

Rx ID
071900002
071900001

### Manage Prescription

<b>Status</b>	Reactivated (Yesterday)
<b>Originally Created On</b>	Yesterday (Dr. Kevin Rees)
<b>Last Printed On</b>	Yesterday (Dr. Kevin Rees)
<b>Drug Name</b>	Amoxicillin
<b>Strength / Dosage</b>	500 mg
<b>SIG</b>	Three times a day
<b>Formulation</b>	Tablet
<b>Quantity / Days</b>	30 / 10 Days
<b>Refills</b>	0
<b>Substitutions Allowed</b>	Yes
<b>Schedule II (Controlled)</b>	No

Print Rx Repeat Rx Void Rx Close

**Actions**

Create New Prescription

Void Prescriptions

Filter List Reset

Search Prescriptions x

Prescribed By

All Doctors

Date Range

All Dates

As previously mentioned, users can create prescription templates to make the day-to-day creation of common drug orders more efficient. Prescription templates can be created and managed via the new Prescription Templates UI with the Administration tab (User Menu → Administration → Templates → Prescription Templates). As with other templates in CMP, prescription templates are global for the customer and can be used across all locations that exist within the customer database (tenant). Some aspects of templates can also be edited in bulk, allowing for the modification of basic template properties or deactivating old templates. Templates can also be created “on the fly” as patient prescriptions are created, by checking the “Save as Rx Template” control when creating a new prescription. A sensible template name will be created automatically from the drug name and strength / dosage value.



Prescription Templates  
for All Locations

0 of 3 templates selected

Rx Template Name	Drug Name	SIG	Strength	Qty/Days	Form	Sch II	Status	Refills	Subs
Amoxicillin 500 mg	Amoxicillin	Three times a day	500 mg	30/10d	Tablet		A	0	Y
Clindamycin 250 mg	Clindamycin	Three times a day	250 mg	30/10d	Oral Tablet		A	0	Y
Tylenol #3 1000 mg	Tylenol #3	Twice a day	1000 mg	14/7d	Tablet	Y	A	0	Y

Create Prescription Template

Drug Name: Tylenol #3

Strength / Dosage: 1000 mg

Template Name: Tylenol #3 1000 mg

SIG: Three times a day

Formulation: Tablet

Quantity / Days: 15 / 5 Days

Refills: 0

Substitutions Allowed: Yes No

Schedule II (Controlled): Yes No

Specify whether the drug associated with this prescription template is considered a Schedule II (controlled) substance. Note: This will determine whether or not additional provider information is included with the prescription when printed.

Create Cancel

This new functionality will provide some needed clinical workflow support, allowing providers to track and manage prescriptions within CMP. We are excited to provide this functionality to CMP users and look forward to receiving feedback, as this has been a

repeated customer request. Additional enhancements, as needed, will be implemented based on initial user feedback.

## Optimizations and Fixes

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

1. Addressed an issue in which users could not successfully print treatment plans that included 20+ procedures.
2. Resolved a defect in which browser cache prevented the successful installation of a newer version of the Imaging Bridge.
3. Fixed a technical issue which prevented the upload of certain image types via CSI, resulting in these images not being correctly displayed in CMP.
4. Corrected an issue in which the start and end times displayed on a selected time block in the Schedule Day View did not match the time span selected (e.g., offset by the location's assigned timezone).
5. Addressed a defect in which new charges failed to post when a large number of procedures are posted to a Patient Ledger simultaneously.
6. Fixed an issue in which completed, and subsequently uncompleted, procedures would sometimes fail to reappear on a patient's treatment plans after being reverted (uncompleted).
7. Resolved an issue in which the Balance Due displayed on Patient Statements was incorrectly accounting for estimated insurance for procedures / claims that have already been paid / resolved.
8. Addressed a workflow defect, preventing users from saving Allowance Table coverage rules that include coverage of procedures with an Allowed Amount of \$0.
9. Fixed a defect that would sometimes produce a backend error when a patient has one or more treatment plans with zero planned procedures within the plan.
10. CMP will now prompt users with an informational dialog when there is an issue with Closing the Day so that the process can be reattempted, preventing an issue in which users were sometimes unable to view Archived Daysheet reports when a technical error occurred when closing the day (files failed to successfully make it into blob storage).
11. In response to direct customer VOC, a UI modification was made to simplify the canned recare / recall appointment reminder text to make it more generally applicable, beyond standard prophylaxis / cleaning appointments.
12. Resolved a defect in which copies of the emails sent to patients for recare / recall appointment reminders were not being automatically saved to the associated patient's Patient Files.
13. Addressed an issue that would sometimes prevent patient images from being retrieved / displayed in CMP when the tenant experienced a backend issue with its imaging configuration / profile.
14. Fixed a technical defect that would occur when a new customer tenant / database was provisioned, which would result in backend errors when subsequently trying to

create new insurance claim records.

15. Addressed an issue that would sometimes create a backend error when trying to view the insurance claim details for existing claims when the customer has not been configured for NEA / Vyne integration (for electronic claims attachments).
16. Resolved a defect in which patient images (radiographs) would fail to display correctly in CMP when the files were missing metadata.

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