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**MOD** kevin\_moloney

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08-02-2019 12:45 PM

## CMP Weekly Release 0.0.0.3960

# Care Management Platform (CMP)

## Weekly Release

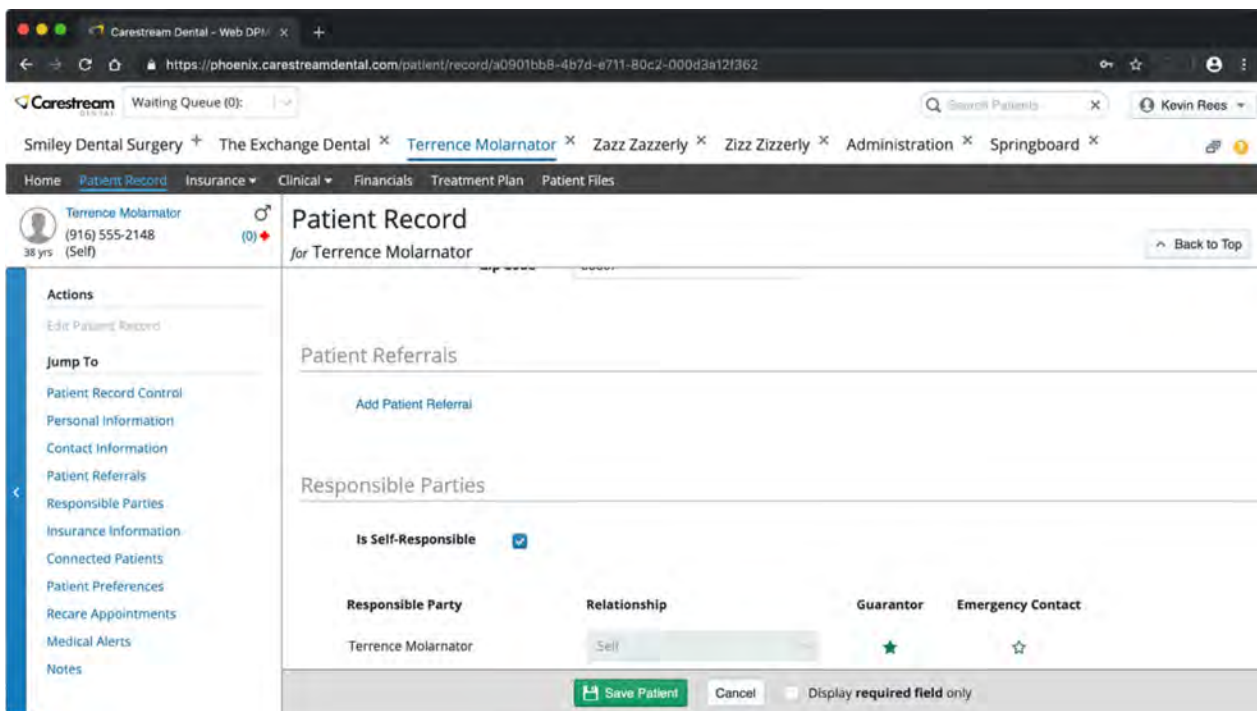
Build 0.0.0.3960 | August 2nd, 2019

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.

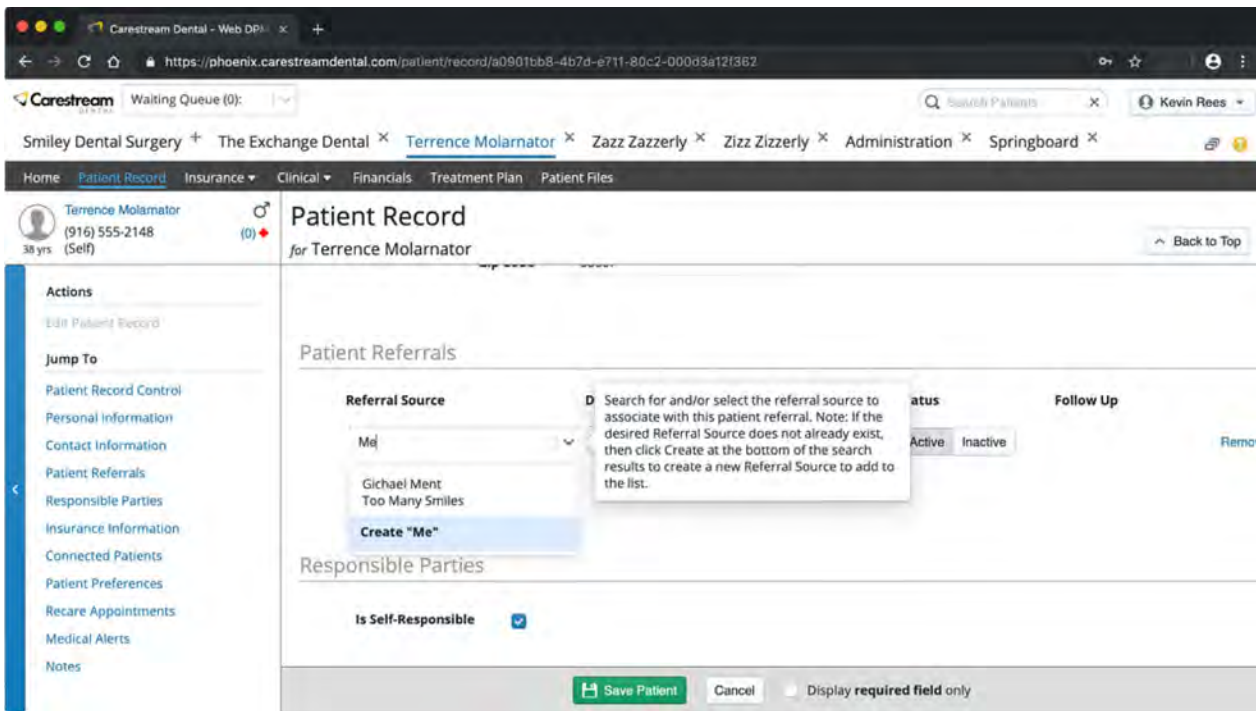
### Managing Patient Referral Follow-Ups

This week's release includes the implementation of the initial solution for handling referral follow-ups. This has been added to support workflows involving the follow up communication with referring provider once a (referred) patient has been seen in your practice. CMP users can now create referral sources (other doctors, providers, practices), assign them to patients, have them automatically associated with completed appointments, and then use the new Referral Follow-Up List UI to communicate with the referral source about the patient care that was delivered.

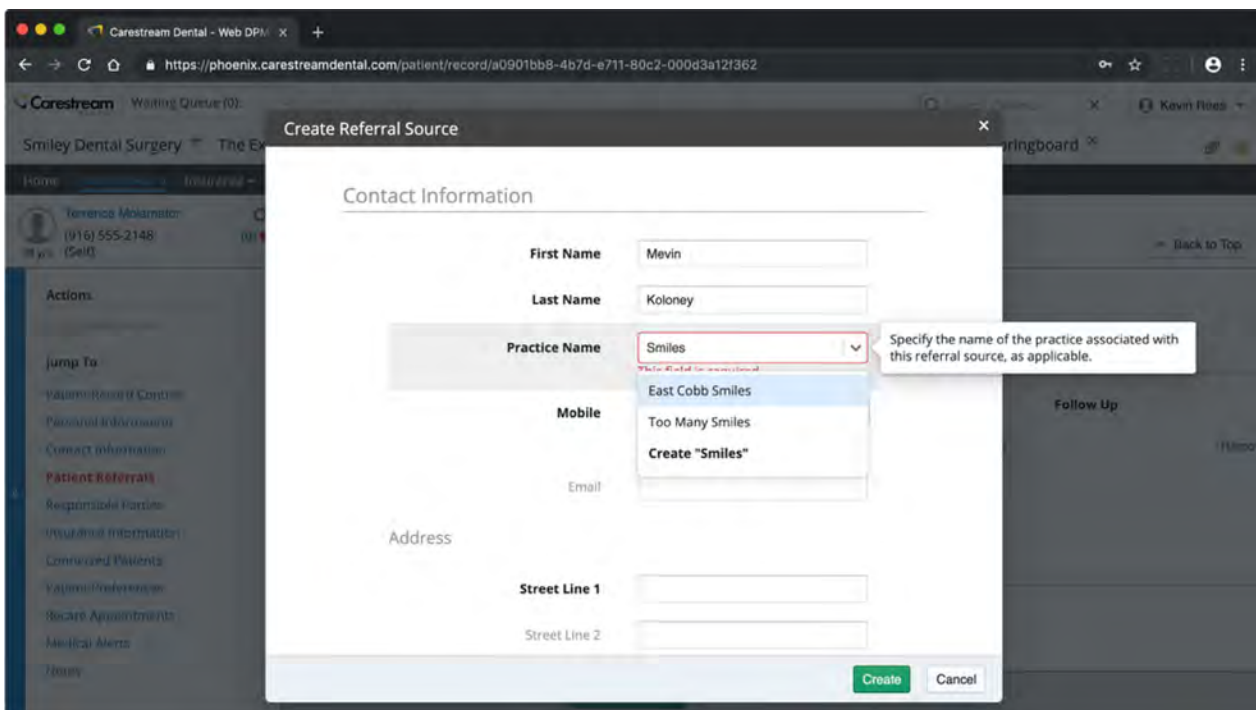
Referral sources can now be created and assigned to patients via the new Patient Referrals functionality in the Patient Record UI. Practices can quickly build up a database of recurring referral sources in much the same way that Responsible Parties, Insurance Policyholders, and even medical alerts. Once new referral sources are created while defining the referral for a patient, the source becomes globally available for reuse throughout all of the practice's locations. As part of assigning a referral source in a patient's record, CMP users can either select an existing referral source or create a new one.



To assign a referral source to a patient, simply click on "Add Patient Referral" while editing the Patient Record UI. Users will then search for an existing referral source or create a new one. The process for creating a new referral source uses a similar interaction pattern to the creation of new patients, responsible parties, or insurance policyholders. If the desired source does not already exist, then simply click "Create {Name}" in the search results to start creating the new referral source.



From here, users must define some basic information about the referral source, such as name, associated practice, phone number, and address. To facilitate email-based communications, an email address can be defined as well. The “Practice Name” control is used to define the referral source’s associated practice and functions much like Medical Alerts, allowing for the quick creation of reusable practices which allows for the flexibility to define multiple referral sources within the same referring practice.



**Create Referral Source**

**Contact Information**

First Name: Mevin

Last Name: Koloney

Practice Name: Smiles 4 Miles

Mobile: (555) 444-2323

Email:

Address

Street Line 1: 404 Toothy Ln

Street Line 2:

Buttons: Create, Cancel

Once selected (or created), users can then define the date of the referral and an associated type (and be set as “active” by default). From this point, any patient appointment created and/or completed will automatically be associated with the referral source. For patients with multiple (active) referral sources it will automatically associate with the active referral source whose date of referral is closest to (but earlier than) the appointment date. In the case of any potential mixups, however, the user has the option to select another active referral source if the one defaulted to happens to be incorrect when sending a follow up communication.

**Referral Follow-Up List**

Filtered by All Patients, All Referral Sources, All Referral Types, All Times

Patient	Appt Date	Procedures	Referral Source	Referral Date	Referral Type	Follow Up
Abel Arellano	Completed on Fri, Aug 2 at 1	D9310	Teff Jelford East Cobb Smiles	Mon, Jul 29	Consult	
Abram Fuentes	Completed on Fri, Aug 2 at 1	D9310	Gark Modfrey Missing Teeth Partners	Mon, Jul 22	Consult	
Barbara Mann	Completed on Fri, Aug 2 at 1	D9311	Gichael Ment Too Many Smiles	Mon, Jun 17	Consult	
Heath Garza	Completed on Fri, Aug 2 at 1	D0603, D0...	Hason Jugues Smirking Dental	Mon, Jul 15	Assessment	
Terrence Molarnator	Completed on Fri, Aug 2 at 1	D9310, D0...	Mevin Koloney Smiles 4 Miles	Fri, Aug 2	Assessment	

As mentioned, once an appointment - for a patient with an active referral source - is completed, it will now be added to the new Referral Follow-up List UI (Location Tab → To Do → Referral Follow-Up List). Here, users can select a patient appointment (or multiple appointments) and then follow up on the patient care that occurred - communicating with the referral source - in a number of ways. Users could call the referral source to follow up verbally, send an email (if the referral source's email is defined), or generate a letter to be mailed (.pdf generated for printing and mailing or other means of distribution). Alternatively, the referral follow up could be manually "marked as done" if no additional follow up is needed.

**Referral Follow-Up List**  
 Filtered by All Patients, All Referral Sources, All Referral Types, All Times

Patient	Appt Date	Procedures	Referral Source	Referral Date	Referral Type	Follow Up
Heath Garza	Completed on Fri, Aug 2 at 11:00 AM	D0005, D0006, D0007	Smirking Dental	Mon, Jul 15	Assessment	
<b>Terrence Molarnator</b>	<b>Completed on Fri, Aug 2 at 9:00 AM</b>	<b>D9310, D0220, D0230</b>	<b>Mevin Koloney Smiles 4 Miles</b>	<b>Fri, Aug 2</b>	<b>Assessment</b>	

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

**Appt Type:** Consult  
**Procedures:**  
 D9310 (consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician)  
 D0220 (intraoral - periapical first radiographic image)  
 D0230 (intraoral - periapical each additional radiographic image)

**Notes:**  
 Completed - Fri, Aug 2, 2019 11:58 AM by Dr. Kevin Rees  
 Seated - Fri, Aug 2, 2019 11:58 AM by Dr. Kevin Rees  
 Checked in - Fri, Aug 2, 2019 11:58 AM by Dr. Kevin Rees

Buttons: Send Follow-Up, Mark As Done

**Send Follow-Up**  
 Terrence Molarnator at Friday, August 2, 2019... 5/5

Follow Up by: **Letter**

Using template: Consult

This letter is about: Terrence Molarnator

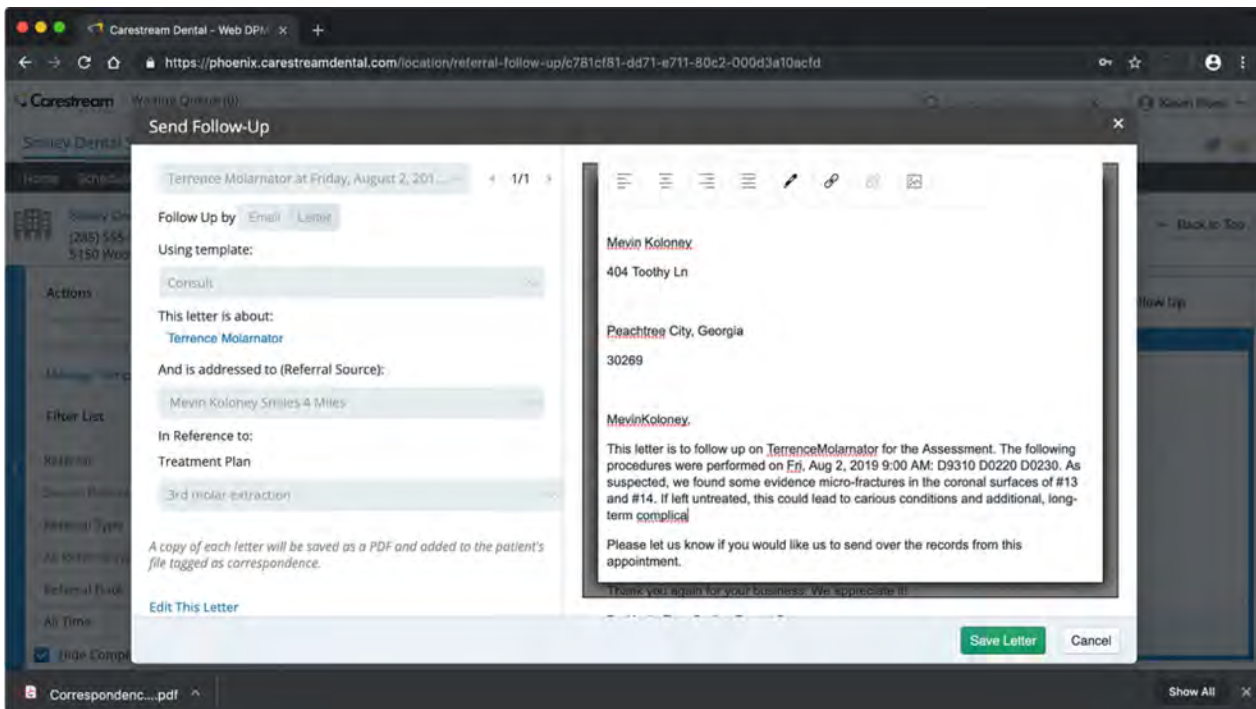
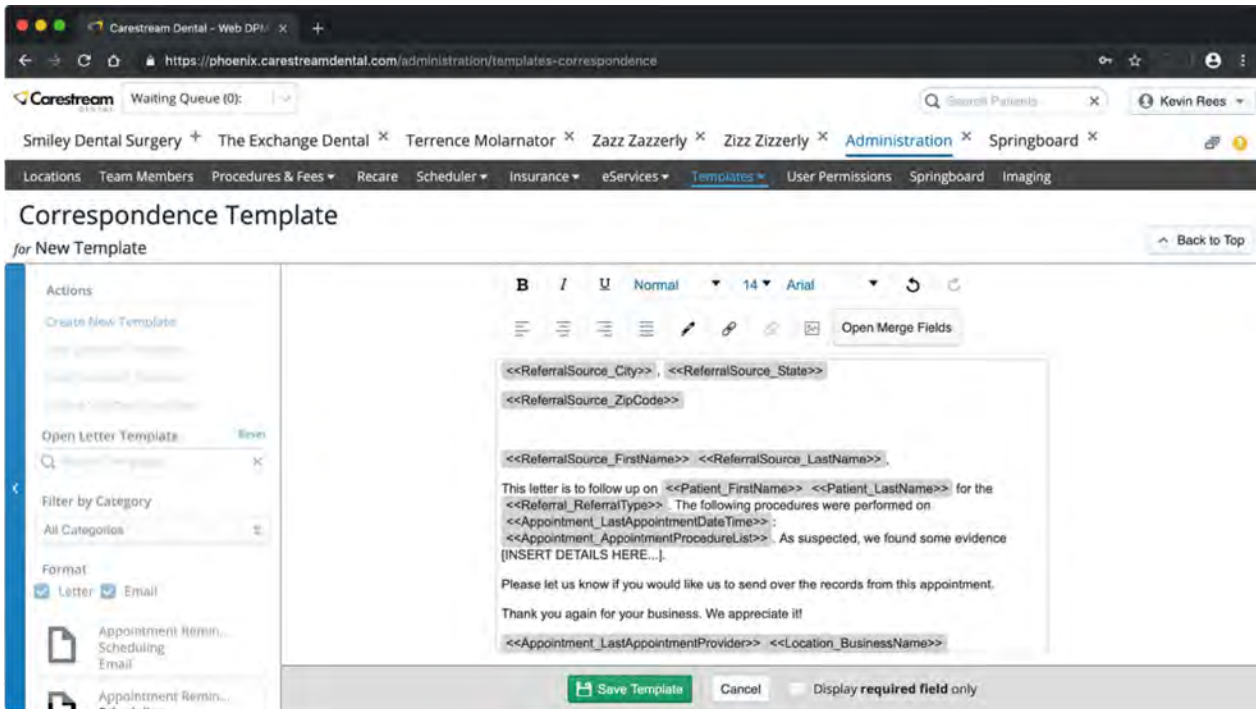
And is addressed to (Referral Source): Mevin Koloney Smiles 4 Miles

In Reference to: Treatment Plan  
 3rd molar extraction

Letter Content Preview:  
 Mevin Koloney  
 404 Toothy Ln  
 Peachtree City, Georgia  
 30269  
 MevinKoloney,  
 This letter is to follow up on TerrenceMolarnator for the Assessment. The following procedures were performed on Fri, Aug 2, 2019 9:00 AM: D9310 D0220 D0230. As suspected, we found some evidence [INSERT DETAILS HERE...].  
 Please let us know if you would like us to send over the records from this appointment.  
 Thank you again for your business. We appreciate it!  
 Dr. Kevin ReesSmiley Dental Surgery

Buttons: Send As, Cancel

Users can leverage the existing Correspondence Templates functionality to create standard letters (or emails) to use for follow-up communications. These (referral type) templates can be used globally for all patient follow-ups. When issuing a follow-up correspondence - by either email or printed letter - users can easily use any (referral type) template and associate the follow-up with any of the patient's active patient referral sources and/or treatment plans. Users can also manually modify the content of the follow-up correspondence, deviating from the template, as need be.



Once marked as done (followed up), the appointment will be hidden from the Referral Follow-Up List (depending on the filter settings defined in the side panel) and the referral status will be updated in both the Referral Follow-Up List and Patient Record UIs. A copy of any correspondence generated will be saved to the Patient Files for the associated patient. In order to stop associating patient appointments with a referral source, users simply need to mark the referral source(s) in the Patient Record as inactive. Note that if the patient does not have any active Referral Sources defined in his patient record, then any current or subsequent appointment will not be added to the Referral Follow-Up List.

The screenshot displays the 'Referral Follow-Up List' in the Carestream Dental Web DP interface. The interface includes a navigation menu with options like Home, Schedule, Financial, Claims, and To Do. The main content area shows a table of patient appointments with the following columns: Patient, Appt Date, Procedures, Referral Source, Referral Date, Referral Type, and Follow Up. The table lists five patients: Abel Arellano, Abram Fuentes, Barbara Mann, Heath Garza, and Terrence Molarnator. The 'Follow Up' column indicates the status of each appointment, such as 'Consult' or 'Assessment', and some entries are marked as 'Sent on 8/2/2019'. A filter list on the left side of the interface allows users to search for patients and filter by referral type and date.

Patient	Appt Date	Procedures	Referral Source	Referral D...	Referral T...	Follow Up
Abel Arellano	Completed on Fri, Aug 2 at 1	D9310	Teff Jelford East Cobb Smiles	Mon, Jul 29	Consult	
Abram Fuentes	Completed on Fri, Aug 2 at 1	D9310	Gark Modfrey Missing Teeth Partners	Mon, Jul 22	Consult	
Barbara Mann	Completed on Fri, Aug 2 at 1	D9311	Gichael Ment Too Many Smiles	Mon, Jun 17	Consult	Sent on 8/2/2019
Heath Garza	Completed on Fri, Aug 2 at 1	D0603, D0...	Hason Jagues Smirking Dental	Mon, Jul 15	Assessment	
Terrence Molarnator	Completed on Fri, Aug 2 at 1	D9310, D0...	Mevin Koloney Smiles 4 Miles	Fri, Aug 2	Assessment	Sent on 8/2/2019

We are excited to provide this initial solution to supporting referral-based workflows and look forward to hearing feedback from our users. We anticipate some enhancement requests related to reporting on how much business / revenue referral sources are generating for a practice. Additional enhancements may include expanding the construct of referral sources to include those that are not provider-related - and thus not involve a potential follow up on patient care - such as existing patients, employees, and marketing campaigns.

## Optimizations and Fixes

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

1. Addressed a number of UI defects resulting from the latest update to the Google Chrome browser.
2. Fixed a UI defect in which the action controls for a Patient File were not accessible under certain display resolutions.

3. Resolved a bug in the Treatment Chart UI in which a backend error would occur and Visit Notes would sometimes not be saved.
4. Fixed a defect in which an error would sometimes result that prevented the posting of procedures associated with a Pre-Authorization Claim.
5. Addressed a bug in the Patient Record UI that would sometimes result in unnecessary Responsible Party controls being added / displayed even when the patient was marked as self-responsible.
6. Fixed a bug in the Patient Record UI in which the Patient Record could be saved without a defined guarantor.
7. Implemented a UI enhancement, per customer request, to the Appointment Details Popover UI that ensure optimal display and positioning (when open) for appointments that range significantly in the amount of associated procedures and/or notes.
8. Addressed an interaction defect in which the appointment type / procedures popover - displayed on hover over Appointment Tiles - was too easily and frequently triggered for display.
9. Implemented some new logical rules for handling patient responsible parties and guarantors in the Patient Record UI in order to better handle workflow variations based on order of operations and variations in patient date of birth.
10. Resolved a backend defect that could impact conversion customers when new Team Members are created and assigned email addresses.

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