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09-20-2019 12:57 PM

CMP Weekly Release 0.0.0.4081

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4081 | September 20th, 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.

Applying Payments to Providers

This week's release include the implementation of the initial solution for reporting on collections by provider. CMP users now have the ability to apply payments directly to providers, crediting them with the collections that have occurred. Once applied, the

Applied Payment report provides payment totals with details to facilitate collections-based payroll activities. Payments that have not yet been assigned to providers can also be easily identified via the Unapplied Payments report.

Payments can be applied to providers directly via the payment transaction in the patient's Ledger (or via the Unapplied Payments report). Once a payment transaction has been posted to the ledger, users can apply this payment to providers by clicking on the new "Apply This Payment" hyperlink in the Payment Details (accessible when left clicking on the ledger transaction to expand the item). The new "Apply This Payment" dialog is displayed, providing users with the list of available providers and the amount of the payment that is unapplied. User can then simply define the dollar value to apply to each provider in the "Amount Paid" fields. The UI will automatically update the Unapplied Amount as the payment is distributed amongst the providers and will prevent users from applying more than is available (e.g., more than the original payment amount or more than what is currently unapplied). Once the user clicks "Save", the amounts are applied to the designated providers and this information will be updated in the new Applied Payments report UI (Location Tab → Financial → Applied Payments).

Trans Date	Svc Date	Code	Description	Amount	Balance
Yesterday	Yesterday	D0170	re-evaluation - limited, problem focused (established patient; not post-operative visit)	\$1,222.35	\$2,830.60
Yesterday	Yesterday	D0180	comprehensive periodontal evaluation - new or established patient	\$1,658.25	\$1,608.25
09/18/2019	09/18/2019	D3352	apexification/recalcification - interim medication replacement	\$100.00	-\$50.00
09/18/2019	09/18/2019	Credit Card	Payment Credit Card	-\$50.00	-\$150.00

Payment Details			Adjust This Payment	Apply This Payment
Trans. Type:	Payment	Location:	LarryB	Amount: \$50.00
Payment Type:	Credit Card	Is Split Payment:	No	Reference:
Posted By:	Jeremy Uriz at 8:13 am	Full Comment:		

09/17/2019	09/17/2019	Cash	Payment Cash - testing	-\$100.00	-\$100.00
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Apply This Payment ✕

Provider Payments

Provider	Amount Paid
Larry Barba	\$0.00 <input type="text"/>
John Smith	\$0.00 <input type="text"/>
Carlie Brown	\$0.00 <input type="text"/>

Unapplied Amount **\$50.00**

It should be noted that the "Apply This Payment" dialog always shows the current state of the payment and the application of its funds, reflecting any changes that have occurred over time. Users can correct applied payments at any time, to address

instances in which payments have been applied to the wrong provider. This is done via the exact same process of applying the payment - selecting the payment transaction, clicking “Apply This Payment”, and then assigning monies to providers. Users can modify the amounts applied to given providers and then save the changes. These changes will then be reflected in the Applied Payments report UI for the applicable reporting period. A given payment’s entire application history, including all modifications, can be viewed via the (printed) Applied Payments report when run for the period from the original payment application through its latest modification.

Apply This Payment ✕

Provider Payments

Provider	Amount Paid
Larry Barba	\$25.00 <input type="text"/>
John Smith	\$15.00 <input type="text"/>
Carlie Brown	\$0.00 <input type="text"/>

Unapplied Amount: **\$10.00**

The application of payments, location-wide, can be reviewed via the new “Applied Payments” report UI (Location Tab → Financials → Applied Payments). As with most report-based screens in CMP, this provides a live, filterable view of data. By default, details of the current month’s applied payments will be displayed, so that users can see the latest payment applications that have occurred. Users can also filter this report by associated providers, payment types, or time period (in which the payment application event occurred) to be able to view. This UI also provides some useful summary statistics (KPIs) for the current view, including the number of payments, the total collections amounts, and a summary of the payment applications that occurred. Lastly, users can also print (.PDF) or export (.CSV) the current report view to allow for additional communication, documentation, or use of this applied payments data.

Applied Payments		# of Payments	Total Payments	Applied	Reversals	Net Pay to Providers	Unapplied
		2	\$199.00	\$180.00	-\$1.00	\$179.00	\$20.00
Patient	Description	Trans Date	Amount	Net Applied Amount	Applied Details	Unapplied	
Jan Smith	Check	09/18/2019	\$99.00	\$80.00	Joe Smith	\$80.00	\$19.00
Lawrence (Larry) Barba	Cash	09/17/2019	\$100.00	\$99.00	Carlie Brown Joe Smith	\$45.00 \$50.00	\$1.00

The Applied Payments report provides detail, on a patient-by-patient basis, of all payment application events that occurred within the reporting period (e.g., based on the current filter settings). This includes details about the original payment transaction, such as how much the payment was for and when it was collected, as well as details about the payment application event, including how much was applied (the “Net Applied Amount”), to which providers, and how much remains unapplied. Each payment transaction in the Applied Payments report can be clicked to display the Payment Summary information (identical to the Patient Ledger UI), allowing users to navigate to the Patient Ledger, adjust the payment transaction, or apply the payment (e.g., apply an unapplied monies or adjust the existing payment application). Any changes made to the payment applications (upon saving) will be automatically reflected in the report. This includes the total amount applied, any payment application adjustments, how much money was applied to providers, and how much money (of these payments) was left unapplied.

Applied Payments		# of Payments	Total Payments	Applied	Reversals	Net Pay to Providers	Unapplied
		3	\$249.00	\$230.00	-\$51.00	\$179.00	\$70.00
Patient	Description	Trans Date	Amount	Net Applied Amount	Applied Details	Unapplied	
Jan Smith	Check	09/18/2019	\$99.00	\$80.00	Joe Smith	\$80.00	\$19.00
Lawrence (Larry) Barba	Cash	09/17/2019	\$100.00	\$99.00	Carlie Brown Joe Smith	\$49.00 \$50.00	\$1.00
Lawrence (Larry) Barba	Credit Card	09/18/2019	\$50.00	\$0.00			\$50.00

Payment Details		Adjust This Payment	View in Patient's Ledger	Apply This Payment	
Trans. Type:	Payment	Location:	Miles of Smiles	Amount:	\$100.00
Provider Type:	Cash	In-Split Payment:	No	Reference:	testing
Posted By:	jeremy Uriz at 1:24 pm	File Comment:			

It should also be noted that the print report (.PDF) for Applied Payments includes details on the payments that have been applied during the reporting period for each applicable provider (again, based on the user’s current view / filter settings). This printed report includes the payment applications for each provider, breaking down these distributions credited to the provider on a payment-by-payment basis, including any payment

application adjustments that occurred within the period and a total for the provider for the reporting period. This will help support practices that pay providers based on collections that occurred during the pay period.

Miles of Smiles

Jeremy Uriz

9/20/2019 8:27 AM

Applied Payment Details - Miles of Smiles

Current View: Applied 9/1/2019 - 10/1/2019, All Providers, All Payment Types

Total Payments Applied to:	Carlie Brown	\$49.00
	Joe Smith	\$130.00

Payment Details for Carlie Brown

Patient	Description	Date	Applied By	Amount	Applied History
Lawrence (Larry) Barba	Payment Cash - testing	9/17/2019		\$100.00	\$49.00
		9/18/2019	Jeremy Uriz		\$50.00
		9/18/2019	Jeremy Uriz		-\$1.00
Total:					\$49.00

Payment Details for Joe Smith

Patient	Description	Date	Applied By	Amount	Applied History
Lawrence (Larry) Barba	Payment Cash - testing	9/17/2019		\$100.00	\$50.00
		9/18/2019	Jeremy Uriz		\$50.00
Jan Smith	Payment Check - 123456	9/18/2019		\$99.00	\$80.00
		9/18/2019	Jeremy Uriz		\$80.00
Total:					\$130.00

As previously alluded to, the Applied Payments screen also includes a filter setting that allows the user to view all payments that have been posted during the defined reporting period which also have any unapplied monies. Again, by default, the Unapplied Payments report will display those unapplied payments (or payments with unapplied amounts) posting during the current month. Much like the Applied Payments report, this screen provides detail on these payment transactions, the current application / distribution details (amounts and providers) if applicable, and the currently unapplied amounts. Users can click on the transaction to view the additional payment transaction details and provide a means for viewing the patient's ledger, adjusting the payment, or applying the payment. As the remaining, unapplied monies are applied to providers, the payment will be removed from this report and included in the updated Applied Payments report. As with the Applies Payments report, the current view of the Unapplied Payments report can be printed (.PDF) or exported (.CSV) to support additional usage of this data.

		# of Payments:	Total Payments:	Applied:	Unapplied:
		3	\$249.00	\$179.00	\$70.00

Patient	Description	Trans Date	Amount	Net Applied Amount	Applied Details	Unapplied
Jan Smith	Check	09/18/2019	\$99.00	\$80.00	Joe Smith	\$19.00
Lawrence (Larry) Barba	Cash	09/17/2019	\$100.00	\$99.00	Carlie Brown Joe Smith	\$1.00
Lawrence (Larry) Barba	Credit Card	09/18/2019	\$50.00	\$0.00		\$50.00

Miles of Smiles

Jeremy Uriz

9/20/2019 8:28 AM

Unapplied Payment Details - Miles of Smiles

Current View: Entered 9/1/2019 - 10/1/2019, All Payment Types

# of Payments	Total Amount	Total Applied	Total Unapplied
3	\$249.00	\$179.00	\$70.00

Patient	Description	Date	Amount	Applied	Unapplied
Jan Smith	Payment Check - 123456	9/18/2019	\$99.00	\$80.00	\$19.00
Lawrence (Larry) Barba	Payment Cash - testing	9/17/2019	\$100.00	\$99.00	\$1.00
Lawrence (Larry) Barba	Payment Credit Card	9/18/2019	\$50.00	\$0.00	\$50.00

We are excited to provide this initial step towards supporting collections-based payroll workflows and a more robust system of financial reporting in CMP. We look forward to receiving feedback from our users and are already planning to enhance the applied payments functionality. This includes the ability to associate payments with specific procedures / production that has been posted, including the ability to apply adjustments and write-offs that have been posted.

Optimizations and Fixes

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

1. Fixed a defect in the electronic claim file in which the formatting of values over \$999.99 would sometimes cause issues with the processing of the claim.
2. Resolved an issue in which the date of birth assigned to the patient would sometimes get shifted / altered by a day when the patient is assigned as the insurance policyholder.
3. Addressed a backend error that would sometimes be generated when trying to view the claim summary information when an associated pre-authorization has not

yet been approved.

4. Fixed an issue in the Financial Daysheet functionality in which the archived daysheet reports would sometimes not includes the totals (calculated values).
5. Added the referral source phone number to the referral details in the Referral Follow-Up List to make it easier for practices to contact follow-up sources by phone, when needed.
6. Added some pre-configured values for referral types to make it easier for users to start using the referral follow-up functionality out-of-the-box.
7. Resolved a defect in which the Visit Note text would sometimes be lost after having been entered in the Treatment Chart UI if the appointment is then completed via the Schedule DayView.
8. The patient (and RP and policyholder) SSN values are now masked upon entry and when displayed in the record UIs and the claim details.
9. Fixed an issue in which the provisioning of a new tenant database was sometimes prevented.

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3625 Cumberland Blvd. Ste. 700
Atlanta, GA 30339

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