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10-09-2019 12:02 PM

CMP Weekly Release 0.0.0.4094 (Part Two)

Care Management Platform (CMP)

CMP Weekly Release (UK Edition)

Build 0.0.0.4094 | October 9th, 2019

Part Two of the highlights of the changes available in this week's Care Management Platform (CMP) release. It should be noted that these updates are specifically for those customers using CMP in the UK.

NHS Claims

Once the patient's NHS course of treatment is accepted, the provider can begin completing treatment items. Course acceptance is handled via the "checkmark" icon next to the Treatment Plan name in the Hard Tissue Chart UI (Planning mode) or the Treatment Plan UI. Note that this will also reject any other open NHS courses of treatment, as you can only have a single accepted NHS course. Once the NHS course of treatment is accepted, the NHS claim is automatically created and available.



Once the NHS course of treatment has been accepted, then users can start performing and completing the work. If the patient fails to start the NHS course and none of the treatment has been completed, then the provider can "Delete Plan and Claim" via the Treatment Plan information popover (hover on "i" icon wherever the Treatment Plan is displayed). This will delete the NHS course of treatment and the provisional claim. If the patient started the NHS course of treatment, but failed to complete the entire course, then the provider can "Mark as Failed to Return" via the Treatment Plan information popover. CMP will then provide the user with options on how to handle the unfinished treatment items in the NHS course. The provider can then move any uncompleted items into a new, open NHS course of treatment or discard them entirely. In either case, the user can now manage the NHS claim for the treatment that was completed and claim the associated UDAs. If the patient has completed the entire NHS course of treatment, then the provider can mark the NHS course as "ready to send" to prepare the claim for submission.

Carestream | Waiting Queue (5) | J. Downing 09:00 am | G. Rigby 09:00 am | A. Abbot 09:00 am | M. James 01:00 pm | B. Windsor 02:00 pm

CS Dental + Steve Barnes Administration

Home Patient Record Medical Clinical Financials Treatment Plan Patient Files NHS Claims

Steve Barnes 07777 77777 (Self) 49 yrs (Self) NHS

Mode: Current Plan - Charge Band 1: 1 UDAs
 Add Code: NHS PRV
 Region Selection: UR UA UL LR LA LL
 Conditions: 30
 Watches: 0
 Tx Plans: 1
 BPE: ?
 New Exam: No Exams Exist
 No Historical: No Historical

Today's Appointment: 0 items, 14 events

Plan 'Plan 7 - 04/10/2019' Accepted
 Proposed By Jon Barton (Plan 7 - 04/10/2019)

101 Exam Report
 Downloaded By Jon Barton (Plan 7 - 04/10/2019)

Plan 'Plan 7 - 04/10/2019' Created
 By Jon Barton

Plan 'Plan 6 - 04/10/2019' Created
 By Jon Barton

Plan 'Plan 5 - 04/10/2019' Created
 By Jon Barton

Surface Crown - 1726
 Crown - Zirconia Core
 Proposed and Created By Jon Barton (Plan 4 - 04/10/2019)

NHS Course Accepted on 04/10/2019
 Charge Information: Continuation of Treatment

Best Practice Prevention NOT Offered
 NHS Patient Charge of work done is £0.00, of which £0.00 has been posted
 Delete Plan and Claim

Carestream | Waiting Queue (5) | J. Downing 09:00 am | G. Rigby 09:00 am | A. Abbot 09:00 am | M. James 01:00 pm | B. Windsor 02:00 pm

CS Dental + Steve Barnes Administration

Home Patient Record Medical Clinical Financials Treatment Plan Patient Files NHS Claims

Steve Barnes 07777 77777 (Self) 49 yrs (Self) NHS

Mode: Current Plan - Charge Band 1: 1 UDAs
 Add Code: NHS PRV
 Region Selection: UR UA UL LR LA LL
 Conditions: 32
 Watches: 0
 Tx Plans: 1
 BPE: ?
 New Exam: No Exams Exist
 No Historical: No Historical

Today's Appointment: 2 items, 17 events

101 Exam Report
 Downloaded By Jon Barton (Plan 7 - 04/10/2019)

111 Dentist Exam
 Proposed By Jon Barton (Plan 7 - 04/10/2019)

Plan 'Plan 7 - 04/10/2019' Accepted
 By Jon Barton

Plan 'Plan 7 - 04/10/2019' Created
 By Jon Barton

Plan 'Plan 6 - 04/10/2019' Created
 By Jon Barton

Plan 'Plan 5 - 04/10/2019' Created
 By Jon Barton

Surface Crown - 1726

NHS Course Accepted on 04/10/2019
 Charge Information: Continuation of Treatment

Best Practice Prevention NOT Offered
 NHS Patient Charge of work done is £0.00, of which £0.00 has been posted
 Mark as Failed To Return

Carestream | Waiting Queue (5) | J. Downing 09:00 am | G. Rigby 09:00 am | A. Abbot 09:00 am | M. James 01:00 pm | B. Windsor 02:00 pm

CS Dental + Steve Barnes Administration

Home Patient Record Medical Clinical Financials Treatment Plan Patient Files NHS Claims

Steve Barnes 07777 77777 (Self) 49 yrs (Self) NHS

Mode: Current Plan - Charge Band 1: 1 UDAs
 Add Code: NHS PRV
 Region Selection: UR UA UL LR LA LL
 Conditions: 31
 Watches: 0
 Tx Plans: 1
 BPE: ?
 New Exam: No Exams Exist
 No Historical: No Historical

Today's Appointment: 2 items, 17 events

101 Exam Report
 Downloaded By Steve Barnes (Plan 7 - 04/10/2019)

111 Exam Report
 Proposed By Steve Barnes (Plan 7 - 04/10/2019)

Plan 'Plan 7 - 04/10/2019' Accepted
 By Jon Barton

Plan 'Plan 7 - 04/10/2019' Created
 By Jon Barton

Plan 'Plan 6 - 04/10/2019' Created
 By Jon Barton

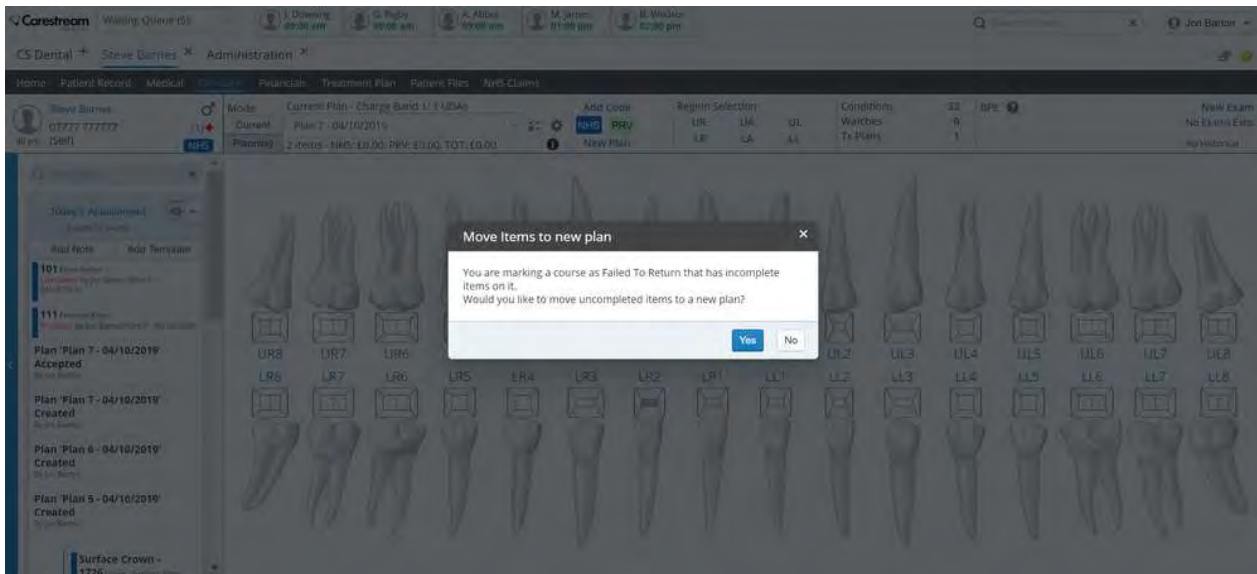
Plan 'Plan 5 - 04/10/2019' Created
 By Jon Barton

Surface Crown - 1726

Please confirm this action - It cannot be undone

You are about to mark this course as Failed To Return
 Do you wish to go ahead and do this?

Yes No



Once the entire course is completed (or marked as “Failed to Return”), the provider can mark the NHS course as “Ready to Send” via the “Update NHS Claim” UI. From this UI, the user can review and update as much of the claim information as needed. Most of the claim information is automatically pre-populated from the information already provided by the preceding user actions, but the user has the option to override these calculated values. This includes the Charge Band and Activity Band determined from the NHS procedure rules and the collection of procedures completed in the course of treatment, as well as the Exemption status (which had been defined in the Patient Record), the Clinical Data Set / DMF information (which was again determined by the set of completed procedures from the course), and other service information. The provider also has the option to mark the

delivery of NICE guidance and set the patient's recall interval and also enter the patient's email address or mobile phone number to be contacted for surveys about their NHS dentistry experience.

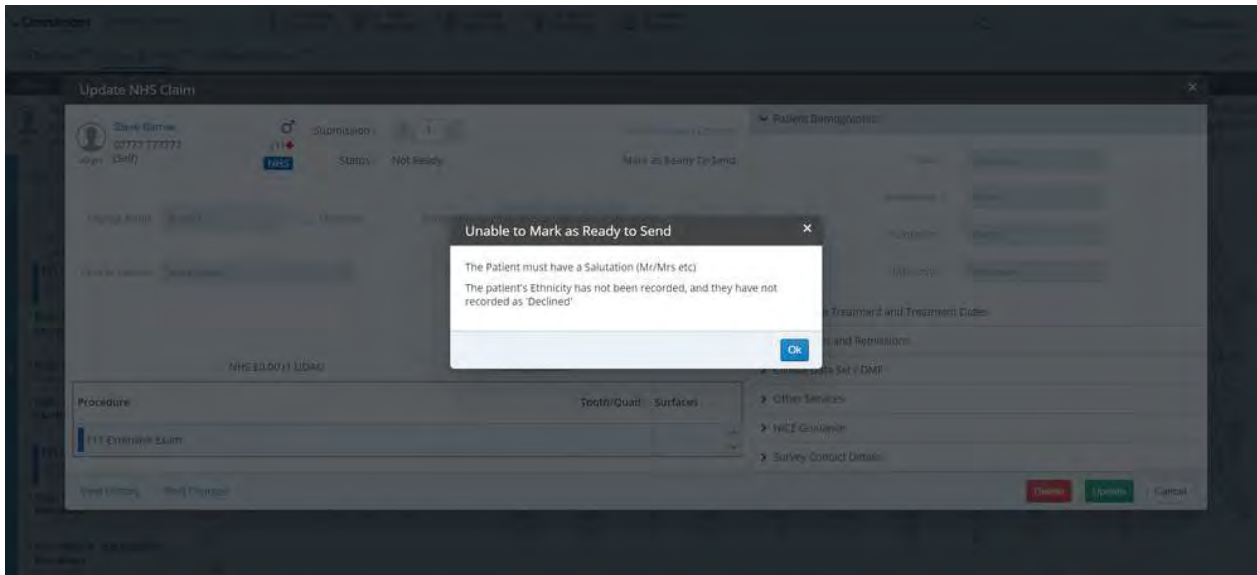
The screenshot shows the 'Update NHS Claim' interface. At the top, it identifies the patient as Steve Barnes, 49 years old, with contact number 07777 77777. The submission status is 'Not Ready'. The form includes fields for 'Charge Band' (Band 1), 'Activity Band' (Band 1), 'Course Owner' (Nina Gilbert), and 'Contract' (NHS Contract). Below these, it shows 'NHS £0.00 (1 UDAs)' and 'Pt Charged £0.00'. The procedure section lists '111 Extensive Exam'. On the right, the 'Clinical Data Set / DMF' section is expanded, showing 'Override Generated Values' checked and several checkboxes for 'Scale & polish', 'Fluoride varnish', 'Fissure Sealants', 'Radiographs', 'Endodontics', and 'Fillings'. At the bottom right, there are 'Delete', 'Update', and 'Cancel' buttons.

CMP will automatically deal with exception cases, saving the user additional confirmation work and preventing mistakes. For example, if the patient has recently had a completed NHS course of treatment within the last two months (of the same or lower UDA banding), then this new course (and claim) will not have an associated patient charge and the associated claim will automatically be marked as a “continuation of treatment”.

This screenshot shows the same 'Update NHS Claim' form, but with the 'Other Services' section expanded. The 'Further treatment (2 months)' checkbox is checked. Below this, there are checkboxes for 'Treatment on Referral', 'Free repair/replacement', 'Domiliary Services', and 'Segation Services'. The 'NICE Guidance' and 'Survey Contact Details' sections are also visible at the bottom of the right-hand panel. The 'Delete', 'Update', and 'Cancel' buttons remain at the bottom right.

Once the user has defined the NHS claim details to his or her liking - or has simply accepted all of the pre-populated defaults - the claim can be marked as “ready to send”. Clicking on the “Mark as Ready to Send” hyperlink in the Update NHS Claim UI will trigger CMP to automatically perform a series of validation checks against the claim data that are

known that result in claim rejection. If any validation errors are found, then the user is notified and prompted to correct these issues before the claim can be set as “ready to send”.

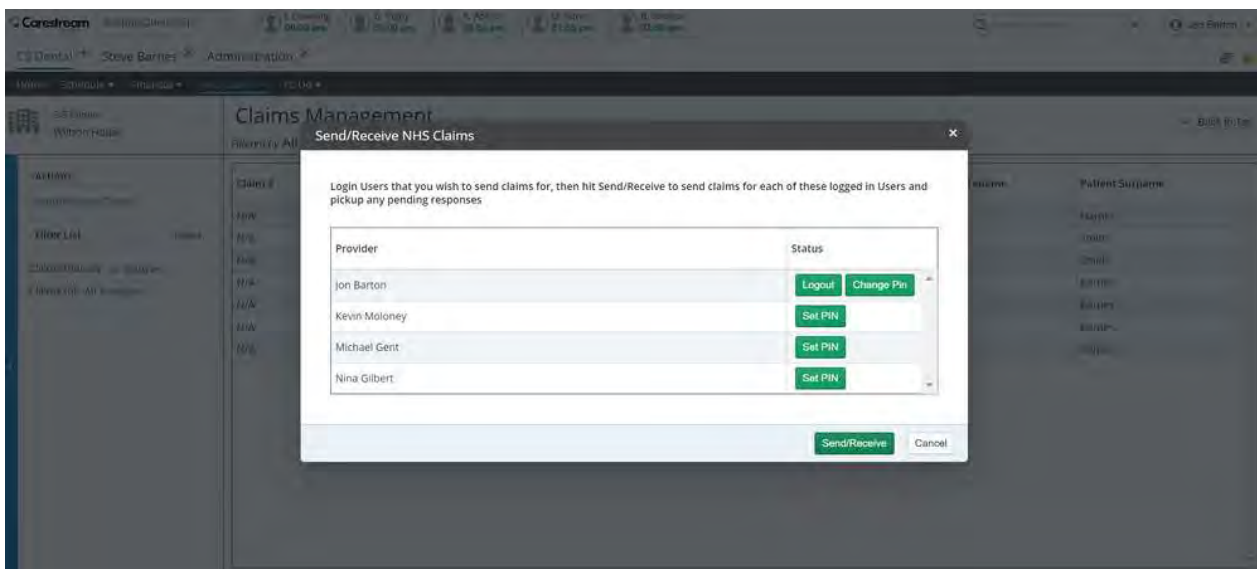
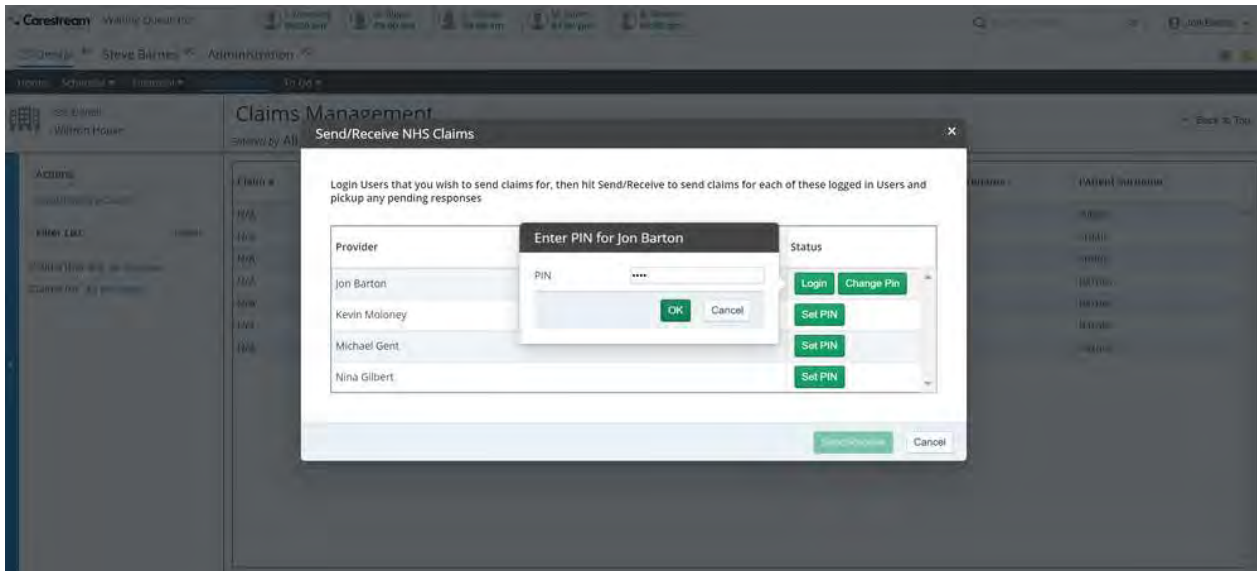


Once any validation errors with the NHS claim data are addressed, the claim is set as “Ready to Send”, and it is available for transmission. NHS claims can be reviewed and managed via the Claims Management UI, available at both the practice (location) level (Location Tab → NHS Claims → Claims Management) and the individual patient level (Patient Tab → NHS Claims). In the Claims Management UI, users can review and manage existing claims, filter existing claims based on claim status and associated provider (e.g., claiming dentist), and send/receive NHS claims. For example, users can filter the claims list to only see those claims that have been rejected or adjusted, so that they can correct and re-transmit these claims. The “Recently Settled Claims” UI is also available to review NHS claims that have been paid in the last two months (Location Tab → NHS Claims → Recently Settled Claims).

The screenshot shows the "Claims Management" interface. At the top, there are user avatars and a search bar. Below the navigation bar, the "Claims Management" section is active, showing a table of claims. The table is filtered by "All Statuses, All Providers". The table has the following columns: Claim #, Status, Acceptance Date, Patient Charge, UDA Value, Claiming Dentist, Patient Forename, and Patient Surname. The data rows are as follows:

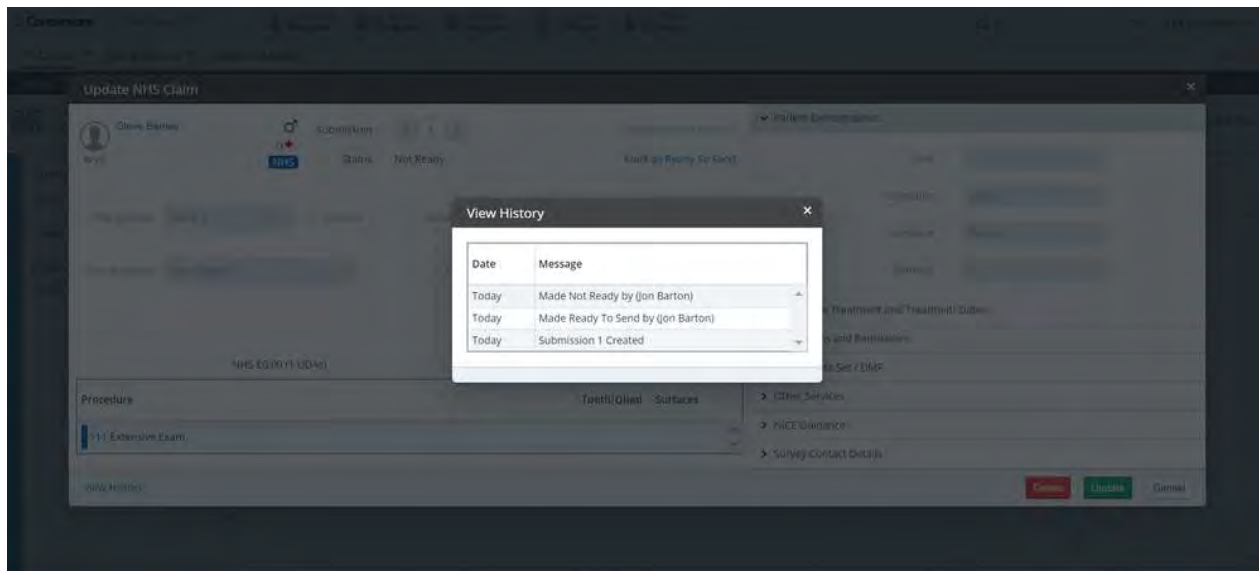
Claim #	Status	Acceptance Date	Patient Charge	UDA Value	Claiming Dentist	Patient Forename	Patient Surname
N/A	Not Ready	08/10/2019	£0.00	1	Nina Gilbert	Helen	Harper
N/A	Not Ready	02/10/2019	£269.30	12	Nina Gilbert	Jon	Smith
N/A	Ready To Send	Yesterday	£0.00	3	Nina Gilbert	Jon	Smith
N/A	Ready To Send	Yesterday	£269.30	12	Nina Gilbert	Steve	Barnes
N/A	Ready To Send	Today	£0.00	3	Nina Gilbert	Steve	Barnes
N/A	Not Ready	Today	£0.00	1	Nina Gilbert	Steve	Barnes
N/A	Ready To Send	Today	£0.00	1	Nina Gilbert	Steve	Barnes

To transmit the “Ready to Send” claims, the user must simply click on the “Send/Receive Claims” action in the side panel of the Claims Management UI. From here, the all providers associated with “Ready to Send” claims can log in with their PIN (Personal Identification Number) and send all applicable claims. Any NHS claims that are “Ready to Send” and are associated with a provider that has entered his or her PIN will be transmitted. Note that any new performers have a chance to set their PIN and any existing performers have a chance to change / update their PIN from the “Send/Receive NHS Claims” dialog.



Note that this sending (transmission) process will also trigger the receiving of any NHS claim responses. Practices can receive NHS claim updates daily, as CMP receives and processes the DAILY schedules from the BSA. To take advantage of this daily reporting, the practice does need to opt in to receive DAILY schedules on the Compass portal. CMP also automatically processes monthly schedules when received. Claim statuses are automatically updated based on BSA responses received.

All changes in NHS claim status are recorded and the history is available for review. The claim status history is available by clicking on the “View History” hyperlink in the NHS Claim UI. This history provides the user with a clear audit trail of the claim’s journey through the process.



Finally, if the claim is rejected or adjusted, the user can view the Claim History on what has happened. If the claim has been adjusted, users can “View History” from the Update NHS Claim UI to review the nature of the adjustment. From here, the user can elect to settle the claim (e.g., “Make Settled”) to accept the adjustments or can create a new submission and make any necessary changes before re-submission. If rejected, the user can use the Update NHS Claim UI to create a new submission, make any changes, and then resubmit the claim. Additionally, in either case, the user could elect to simply delete the claim entirely (and potentially start over with a new claim process). Once finally accepted or otherwise settled, the claim status will be updated, moved to the “Settled Claims” list, and the contract target reporting (UDAs) will be automatically updated if the UDA value has changed from the original value.

Claim #	Settled Date	Acceptance Date	Patient Charge	UDA Value	Claiming Dentist	Patient Forename	Patient Surname
000001	26/09/2019	26/09/2019	£62.10	3	NHS Dentist	First	Patient
000002	26/09/2019	26/09/2019	£62.10	1	NHS Dentist	Crash	Claim
000004	26/09/2019	26/09/2019	£22.70	34	NHS Dentist	Claim	Two
000005	26/09/2019	26/09/2019	£22.70	45	NHS Dentist	Claim	Three
000006	26/09/2019	26/09/2019	£62.10	3	NHS Dentist	AMS	Patient
000007	26/09/2019	26/09/2019	£62.10	1	NHS Dentist	AMS2	Patient
000008	26/09/2019	26/09/2019	£0.00	3	NHS Dentist	Free	Repair2
000009	27/09/2019	26/09/2019	£22.70	1	NHS Dentist	FTR	Patient
000010	27/09/2019	26/09/2019	£22.70	1.2	NHS Dentist	Lirgent	Patient
000011	27/09/2019	26/09/2019	£22.70	1	NHS Dentist2	Hard	Tissue
000012	27/09/2019	27/09/2019	£62.10	3	NHS Dentist	Contract	End
000013	27/09/2019	27/09/2019	£62.10	3	NHS Dentist	Repeat	Treatment

We are very excited to be able to provide this functionality to our UK customers and look forward to hearing feedback on how this release supports the delivery of NHS-based patient care. This release should go a long way to support the core needs of many UK-based practices, enabling the management of NHS courses of treatment, including the ability to define NHS-based courses of treatment, correctly calculate charges, and create, transmit, and manage associated claims.

Medical History Questionnaires v1

This week's release includes an initial implementation of medical history questionnaires, available to our UK customers. This allows the practice to record important medical information from patients, helping to ensure that everyone is aware of conditions and/or patient history that may affect treatment decisions. Medical history can be collected for both NHS and private patients.

The medical history questionnaires are available via the new Medical Questionnaires UI, which is now available in the patient's tab (Patient Tab → Medical). Here, the user can review the latest medical history collected from the patient (by default), along with any other previous histories that have been recorded. Users can click "Complete New Questionnaire" in the side panel to record a new medical history for the patient directly via

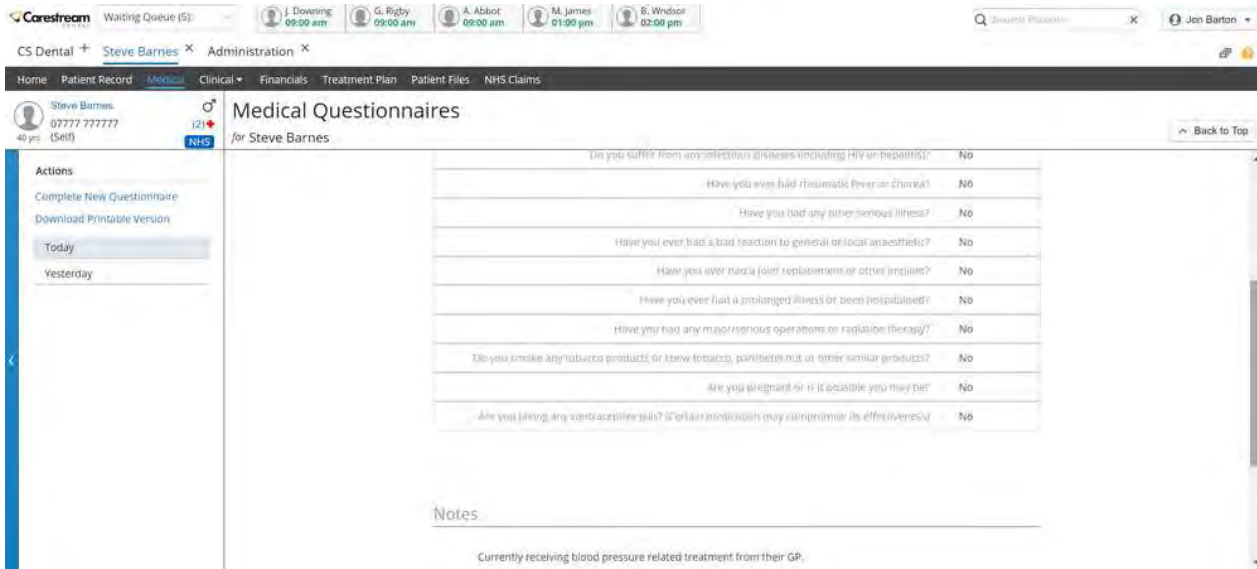
CMP during a patient visit or exam. Alternately, users can download a blank copy of the questionnaire (.PDF), pre-printed with the patient's name, to print or otherwise distribute to the patient for manual completion. This physical copy of the medical history could then be entered into the Medical Questionnaire UI by users at a more convenient time and/or scanned and uploaded into the patient's files (Patient Tab → Patient Files).

The screenshot shows a web-based form titled "Medical Questionnaire" for a patient named Steve Barnes. The form is a table with a header row containing "Question", "Yes", and "No". Below the header, there are 15 rows of questions, each with corresponding empty cells for "Yes" and "No" answers. The questions are:

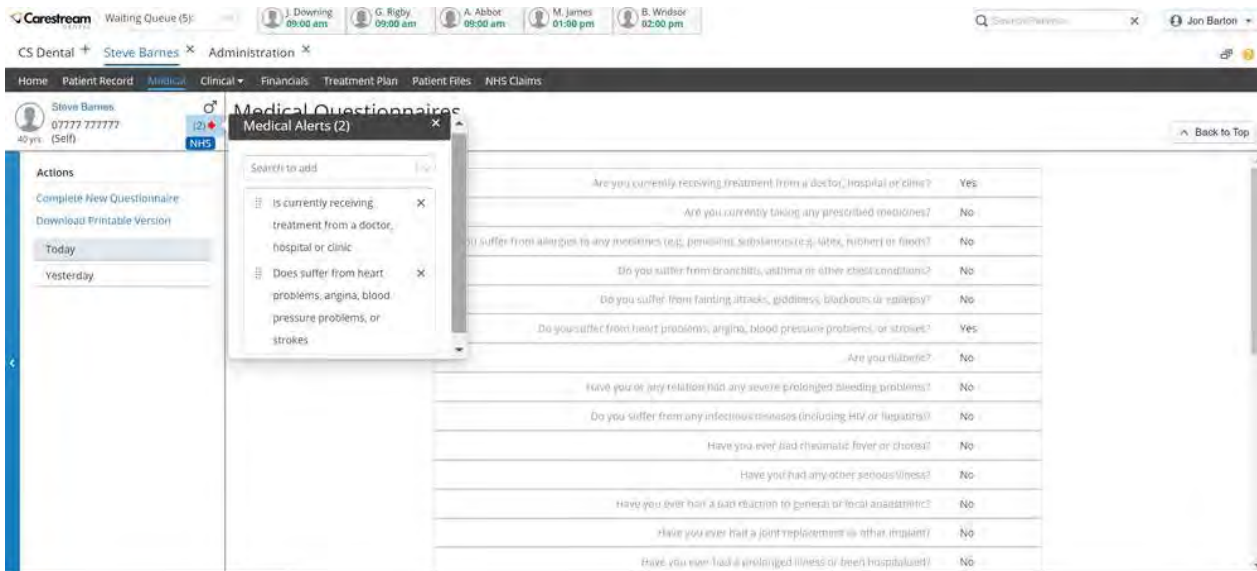
Question	Yes	No
Are you currently receiving treatment from a doctor, hospital or clinic?		
Are you currently taking any prescribed medicines?		
Do you suffer from allergies to any medicines (e.g. penicillin), substances (e.g. latex, rubber) or foods?		
Do you suffer from bronchitis, asthma or other chest conditions?		
Do you suffer from fainting attacks, giddiness, blackouts or epilepsy?		
Do you suffer from heart problems, angina, blood pressure problems, or strokes?		
Are you diabetic?		
Have you or any relation had any severe prolonged bleeding problems?		
Do you suffer from any infectious diseases (including HIV or hepatitis)?		
Have you ever had rheumatic fever or chorea?		
Have you had any other serious illness?		
Have you ever had a bad reaction to general or local anaesthetic?		
Have you ever had a joint replacement or other implant?		
Have you ever had a prolonged illness or been hospitalised?		
Have you had any major/serious operations or radiation therapy?		
Do you smoke any tobacco products or chew tobacco, pan/betel nut or other similar products?		
Are you pregnant or is it possible you may be?		
Are you taking any contraceptive pills? (Certain medication may compromise its effectiveness)		

Currently, the medical history questionnaire is a simple set of yes / no questions, with the ability to add notes to provide any additional patient history that isn't covered by the questions or otherwise needs clarification. Once saved, the completed questionnaire is available for review. As previously mentioned, all existing medical histories collected for the patient are available for review via the Medical Questionnaires UI, in case changes in patient history needs to be confirmed.

This screenshot shows the "Medical Questionnaires" interface within a web browser. The browser's address bar shows "CS Dental + Steve Barnes x Administration x". The page header includes a navigation menu with "Home", "Patient Record", "Medical", "Clinical", "Financials", "Treatment Plan", "Patient Files", and "NHS Claims". The patient's name "Steve Barnes" and NHS number "07777 77777" are displayed. The main content area shows the questionnaire form with 15 questions and "Yes/No" buttons. A "Back to Top" link is visible in the top right corner. At the bottom of the form, there are "Save" and "Cancel" buttons.



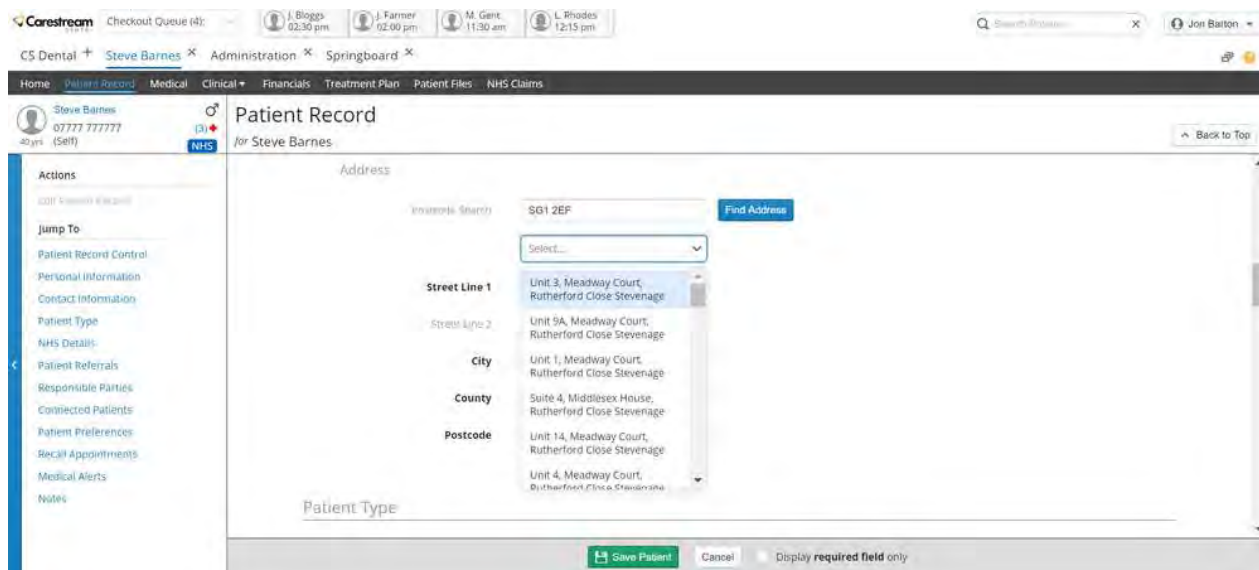
When an answer to a question is set to 'yes' a corresponding medical alert is automatically set on a patient to ensure there is a clear indication of the condition on the patient's record. If the user feels that a medical alert is not warranted then this can be removed from the patient's record manually.



We are happy to provide this clinical workflow support to our CMP UK customers and look forward to hearing how it assists with patient care. The functionality will be enhanced based on customer feedback, with possible future improvements including the ability to define custom questions and direct sending of the .PDF version of the blank questionnaire to a patient's known email address (for offline completion). Carestream Dental are also currently working on a new version of the eForms service, which will significantly advance support for workflow involving electronic forms.

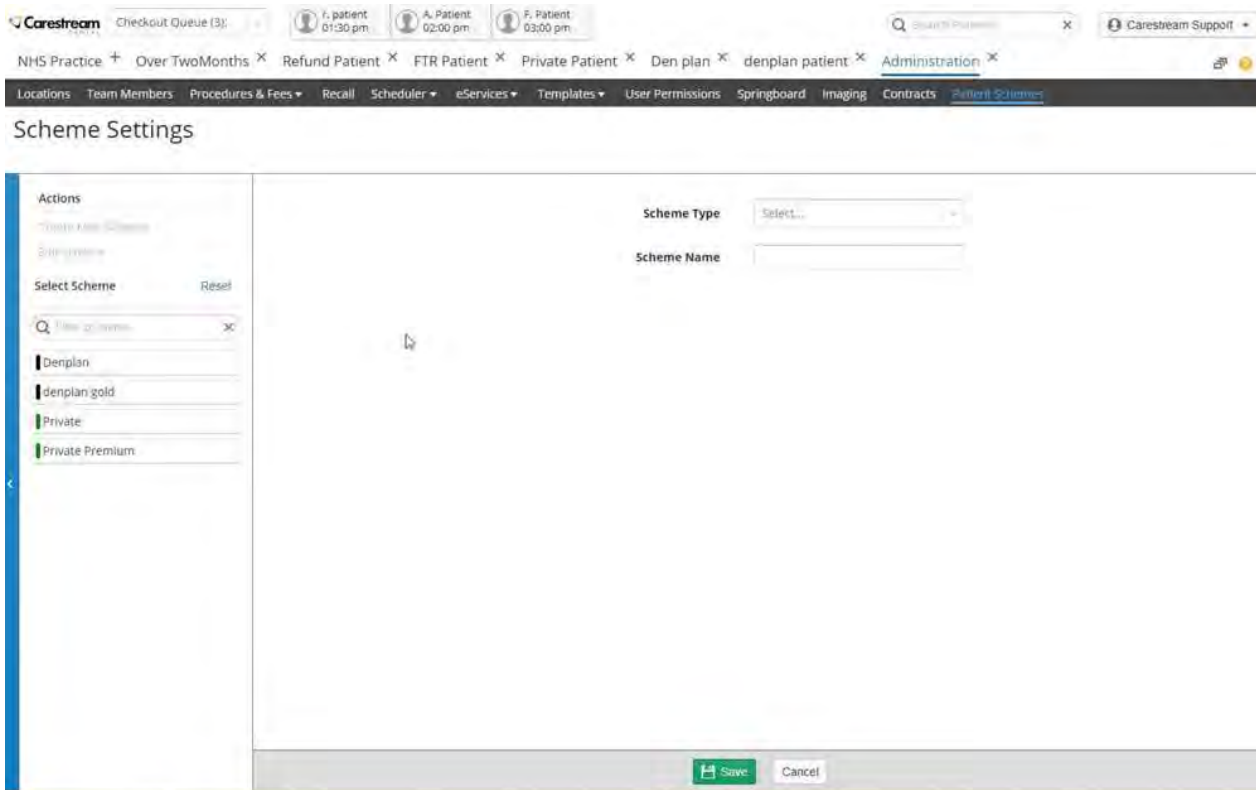
Postcode Lookup

This week's release also includes the ability for users to perform a postcode-based address lookup, allowing users to more quickly find and enter addresses. Once the user enters a postcode, the list of addresses associated with the postcode are displayed. Once selected, the street address, city, and county (and postcode) are all automatically populated. This workflow efficiency will help users ensure that addresses are both more quickly and accurately entered.

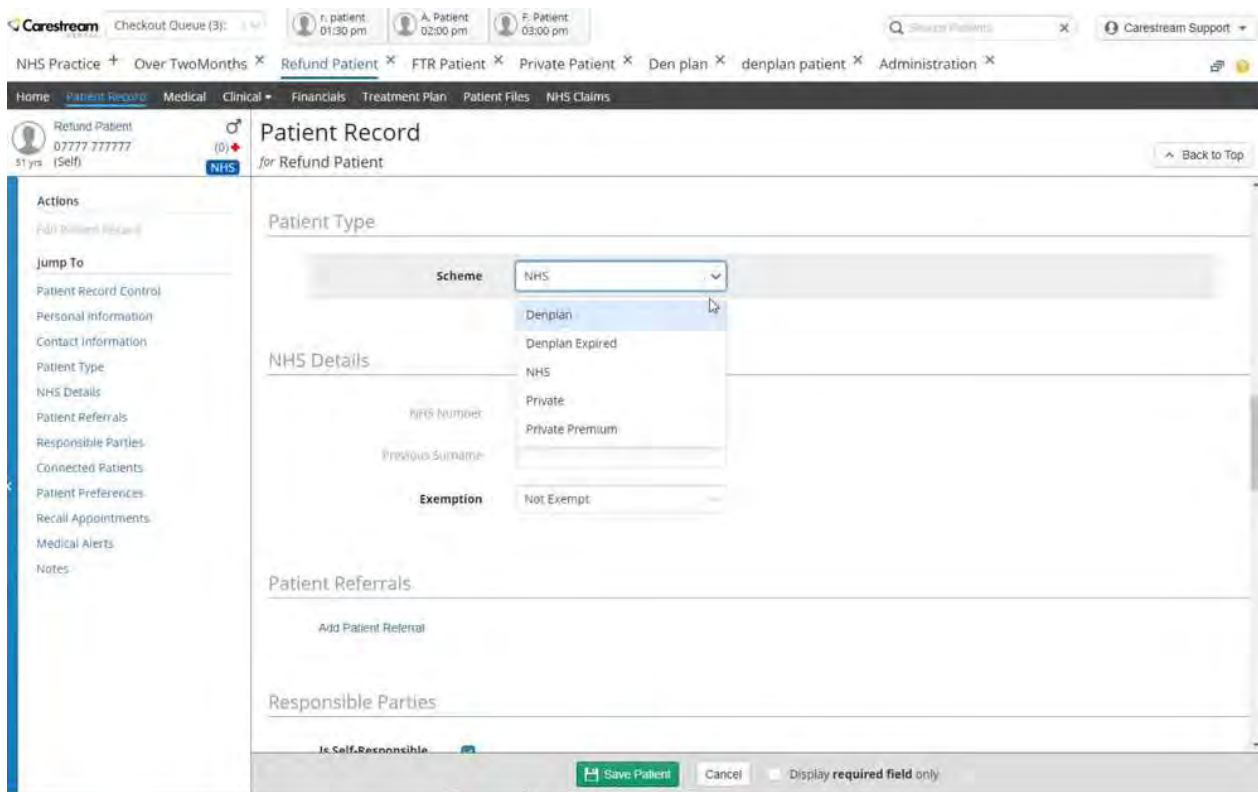


Patient Schemes v1

This week's release also includes an initial implementation of Patient Schemes, available to our UK customers. This allows the practice to create custom patient schemes to assign to patients. Currently, this functionality will only be used to help identify patients of different types (schemes) more easily, but will have many useful applications as the functionality is extended. Users can create patient schemes via the new Scheme Settings UI (Administration Tab → Patient Schemes), where new schemes can be created and existing schemes can be managed. The user must simply define a name for the scheme and an associated type for the scheme. There are three preset scheme types - Private, Denplan, and NHS. It should be noted that new NHS-type schemes cannot be created (e.g., users cannot assign the NHS type to a newly created scheme).



Users can assign a scheme to a patient via the new “Patient Type” controls in the Patient Record UI (Patient Tab → Patient Record). The relevant patient type (scheme) can be selected and applied to the patient. As a result, a visual flag will be placed on the patient’s Patient Minicard UI, depicting his or her (general) scheme membership. This includes a green “PRV” flag for private scheme patient, blue “NHS” flag for NHS scheme patients, or black “DEN” flag for Denplan scheme patients. By default, patients set as the NHS scheme (previously discussed) will automatically be flagged as “NHS” (please note a patient cannot be a member of multiple schemes). Every patient will be automatically assigned to a scheme based on the patient’s association with a default location and that default location’s general status. For example, patients associated with NHS locations will automatically be assigned to the NHS scheme (same for private-only locations). Users can reassign a patient’s scheme at any time via the Patient Record UI.



We are happy to provide this patient administration workflow support to our CMP UK customers. The patient schemes functionality will be enhanced based on customer feedback, with possible future improvements including the ability to define multiple fee schedules and/or procedure lists that can then be associated with specific patient schemes, as well as scheme-based reporting.

Optimizations and Fixes

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

1. Implemented a minor verbiage change in the UI (periodontic → periodontal) for UK customers.
2. An additional field for entering the patient's NHS number is now available in the Patient Record UI, to allow for the processing of NHS courses of treatment and claims.

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