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CMP Weekly Release 0.0.0.4446 (Part 2)

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4446 | January 27th, 2020

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.

[CONTINUED FROM PART 1]

Block Booking / Templated Schedule Views

Lastly, this week's release also includes support for "Block Booking" or the use of appointment type-based templates as guidance in the Schedule DayView UI. Using this functionality, practice's can create templates, based on their established appointment types, and apply to dates to serve as visual scheduling guidance for what types of

appointments should be booked where and when. Practices may find this particularly useful if appointment scheduling is sometimes handled by team members with less knowledge and experience of the practice's normal optimized scheduling rules or when there are special conditions that make a particular day's desired booking patterns unique.

While simple and easy to use, this functionality involves a number of components in CMP. CMP comes pre-configured with a stock set of Appointment Types, which the practice can freely modify and add to based on their needs. Appointment Types can be managed via the Appointment Types UI in the Administration Tab (Administration Tab → Scheduler → Appointment Types). Here, users can modify any of the existing appointment types, including the name, description, and the associated color. Users can also create new appointment types to use for scheduling purposes or when creating block booking templates.

The screenshot shows the 'Appointment Types' management interface in the Carestream Dental Web DPMS. The page title is 'Appointment Types for All Locations'. On the left, there is a sidebar with 'Actions' including 'Create New Appointment Type' and 'Filter Appt Types' (Active, Inactive, All). The main content area is a table with the following columns: Name, Description, Status, Recall, Color, Min, and Associated Procedures. The table lists several appointment types with their respective details.

Name	Description	Status	Recall	Color	Min	Associated Procedures
Consult	Used for exams and consultations without p...	A		Red	45	D0140, D0145, D0170, D0171
Emergency / Walk-in		A		Orange	60	D0140, D0160
Hygiene / Recall	Used for standard recall appts, prophyl, clea...	A		Yellow	45	D0120, D0150, D1110, D1120
Lab	Used to collect or deliver samples, studies, a...	A		Light Green	30	
New Patient Appt		A	Y	Light Blue	60	D0150, D0210, D1110
Ortho		A		Green	30	D8670, D8680, D8690, D869...
Perio		A		Blue	75	D0180, D4341, D4342, D491...
Restoration	Used for minor restorations, aesthetics	A		Dark Blue	60	
Surgery	Used for major restorations, implants, surge...	A		Purple	90	

Using these appointment types, CMP users can create templates to use via the new Block Booking Template UI (Administration Tab → Templates → Block Booking Templates). Clicking on the "Create New Template" action in the side panel will display the Create Block Booking Template UI that allows users to assign a template name and description, as well as being able to set out the blocks of time that define the template's scheduling guidance. It should be noted that templates are location-specific, allowing for the definition of scheduling templates that reflect the chairs and dayview layout of each location.

The screenshot shows the 'Block Booking Template' page in the Carestream Dental Web DPMS. The page is for 'Smiley Dental Surgery'. On the left, there is a sidebar with 'Actions' including 'Create New Template', 'Apply templates', and 'Filter Templates'. The main content area is a table with the following data:

Name	Description	Days in Use	Associated Appt types
Normal Day		30	Hygiene / Recall, New Patient Appt, Restor...
Test Template	Test Template Designation	0	Ortho, Hygiene / Recall

Creating a new block booking template should be easy to learn for CMP users, as the workflow and operations closely mimic how an appointment is booked in the Schedule DayView UI. Once a unique template name is assigned, the user can simply and drag a swath of time in the mock schedule view. Once the time block is selected, the user clicks on the + button to select an appointment type to apply to the block. Once applied, the user can now define another block of time to set in the template. Once all of the time blocks have been defined for the template, it is now available and ready to use.

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/administrator/templates-blockBooking

Smiley Dental Surgery

Create Block Booking Template - Smiley Dental Surgery

Template Name		Hygiene 1	Hygiene 2	Operator 1	Operator 2	Emergency	Walk-Ins
Typical Day							
Description	1:00 PM	1:00 pm					
Contains	2:00 PM	180 Min + x					
	3:00 PM						
Currently Applied To	4:00 PM	4:00 pm					

Click and drag across a series of time blocks to designate a time period for scheduling a particular type of appointment.

Save Cancel

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/administration/templates-blockBooking

Smiley Dental Surgery

Create Block Booking Template - Smiley Dental Surgery

Template Name		Hygiene 1	Hygiene 2	Operator 1	Operator 2	Emergency	Walk-Ins
Typical Day							
Description	1:00 PM						
Contains	2:00 PM						
	3:00 PM						
Currently Applied To	4:00 PM						

Apply Appointment Type to Time Block

Select an appointment type to assign to the specified time block.

chair: Hygiene 1

Time block: 1:00 pm - 4:00 pm

Search

- Consult
- Emergency / Walk-in
- Hygiene / Recall
- Lab
- New Patient Appt
- Ortho
- Perio
- Restoration
- Surgery

Apply Cancel

Click and drag across a series of time blocks to designate a time period for scheduling a particular type of appointment.

Save Cancel

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/administration/templates-blockBooking

Smiley Dental Surgery

Create Block Booking Template - Smiley Dental Surgery

Template Name: Typical Day

Description: 1:00 PM Hygiene / Recall

Contains: Hygiene / Recall

Currently Applied To: Not currently applied

	Hygiene 1	Hygiene 2	Operatory 1	Operatory 2	Emergency	Walk-Ins
1:00 PM	Hygiene / Recall					
2:00 PM						
3:00 PM						
4:00 PM						

Click and drag across a series of time blocks to designate a time period for scheduling a particular type of appointment.

Create Cancel

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/administration/templates-blockBooking

Smiley Dental Surgery

Edit Block Booking Template - Smiley Dental Surgery

Note: This block booking template is currently in use and has been applied to schedule days. Any change made here will update this template everywhere that it is used.

Template Name: Normal Day

Description: 1:00 PM New Patient Appt, Hygiene / Recall, Emergency / Walk-in, Emergency / Walk-in

Contains: Hygiene / Recall, New Patient Appt, Restoration, Surgery, Emergency / Walk-in

Currently Applied To: 30 days (01/20/2020 - 02/28/2020)

	Hygiene 1	Hygiene 2	Operatory 1	Operatory 2	Emergency	Walk-Ins
1:00 PM	New Patient Appt	Hygiene / Recall			Emergency / Walk-in	Emergency / Walk-in
2:00 PM	120 Min	120 Min				
3:00 PM	Hygiene / Recall	New Patient Appt			240 Min	240 Min
4:00 PM	120 Min	120 Min				

Click and drag across a series of time blocks to designate a time period for scheduling a particular type of appointment.

Update Cancel

Now, clicking on the “Apply Templates” action in the side panel (or otherwise navigating), the user will automatically navigate to the Location Schedule Planning UI (Administration Tab → Scheduler → Location Schedule Planning). To apply a block booking template, the user simply clicks on a day or set of days that are to use the template and then click

“Apply Template” in the Selected Day Details of the side panel. After selecting one of the location’s available templates, it is now applied to the selected days and can be viewed in the Schedule DayView UI.

Location Schedule Planning

for Smiley Dental Surgery

Selected Day Details

- Set Day as Closed
- Reset the day
- Apply template

Monday, March 2, 2020

Using Default Office Hours

Hours: 7:00 AM - 12:00 PM
1:00 PM - 5:00 PM

Template Applied

Tuesday, March 3, 2020

Using Default Office Hours

Hours: 7:00 AM - 12:00 PM
1:00 PM - 5:00 PM

Default Office Hours

Legend:

- Normal Day
- Templated Day
- Special Hours
- Closed Day
- Past Day
- Current Day
- Selected Day
- Appts on Day
- Appt Conflicts

Apply template to selected days

Apply a block booking template to the selected days. You can remove this template from the day by clicking on Reset the Day in the Selected Day controls or you can replace this template by selecting the day again and applying a new template.

Selected days 03/02/2020 03/09/2020 03/11/2020

Template Search

Normal Day

Test Template

Cancel

The screenshot displays the 'Location Schedule Planning' interface for 'Smiley Dental Surgery'. The main view is a calendar grid spanning from January 2020 to June 2020. A sidebar on the left provides details for the selected day, Monday, March 2, 2020, including office hours (7:00 AM - 12:00 PM and 1:00 PM - 5:00 PM) and the applied template (Normal Day). The calendar grid uses color-coding and patterns to indicate different appointment types: blue for templated days, red for special hours, grey for closed days, and orange for selected days. A legend at the bottom of the calendar grid defines these visual indicators: Normal Day (white), Templated Day (blue), Special Hours (red), Closed Day (grey), Past Day (diagonal lines), Current Day (blue circle), Selected Day (orange border), Appts on Day (white with blue border), and Appt Conflicts (white with red border).

To view the scheduling guidance in the Schedule DayView UI, users can click on the Manage Schedule View (cog) control and then check the “Show Block Booking Guidance” option. For days that have templates applied, the template will now be laid over the schedule, providing a clear visual indication of the appointment type-based guidelines that should be considered when scheduling appointments. To further enhance this experience, users can also check the “Color Appts. by” option and select “Appt. Types” to apply the appointment type-based color indicator to appointment whenever the type is assigned.

Manage Schedule View

Select Chairs (6 of 6)

Highlight Appts. Unconfirmed

Color Appts. by Providers Appt. Types

Show Block Booking Guidance

Schedule Day/View Friday Jan 17, 2020

for Smiley Dental Surgery

Friday, January 17 2020

	Operatory 1	Operatory 2	Emergency	Walk-Ins
11:00 AM	Master Ian Dean Perio			Mrs. Patti Patrick Emergency / Walk-in
12:00 PM		Mr. Matt Stark Perio		
1:00 PM	Miss Fawn Knight Restoration			
2:00 PM	Nikki Hogan Restoration			
3:00 PM	Ms. Aml Underwood Hygiene / Recall			
4:00 PM	Ms. Yvonne Peck Hygiene / Recall			
5:00 PM				

Schedule Day/View Friday Jan 17, 2020

for Smiley Dental Surgery

Friday, January 17 2020

	Hygiene 1	Hygiene 2	Operatory 1	Operatory 2	Emergency	Walk-Ins
11:00 AM	Gena Newton Hygiene / Recall	Miss Donald Mc Dowell Hygiene / Recall				
12:00 PM						
1:00 PM	Mrs. Clara Rhodes New Patient Appt	Hygiene / Recall	Master Ian Dean Perio		Emergency / Walk-in	Mrs. Patti Patrick Emergency / Walk-in
2:00 PM	Mr. Zane Haas New Patient Appt	Michael Gent Hygiene / Recall	Miss Fawn Knight Restoration	Mr. Matt Stark Perio		
3:00 PM	Master Valentin Velez Hygiene / Recall	Miss Orlando Fisher New Patient Appt	Nikki Hogan Restoration			

We are very excited to provide this new functionality to CMP customers, as we feel that it is a significant enhancement to the way that CMP can support optimal scheduling practices. We look forward to receiving feedback from our users. Planned enhancements include allowing for the easier application of templates over recurring

dates and the ability to use this guidance to highlight conflicts when violating these suggested rules when booking appointments (e.g., appointment with type 1 booked during a type 2 block of time).

Optimizations and Fixes

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

1. Addressed an issue in which appointments “to be scheduled” could not be easily dropped on the DayView for booking.
2. Added an enhancement to the schedule worklist UIs (e.g., Pending List, Recall List, Treatment Plan List) that hides inactive patient records by default.
3. Fixed a defect in which the details from the RP record were not automatically populated in the Patient Record UI when the RP is converted to a new patient.
4. Resolved a small UI defect in the welcome email verbiage that CMP users receive when they are initially provisioned.
5. Addressed a defect in which new databases that are provisioned through the admin portal utility do not have the CDTFeeScales script automatically applied.
6. Per customer request, a “Care Credit” payment type has been added when post new payments to the Patient Ledger UI.
7. Fixed an issue in the calculated balances displayed in patient statements that occurred under some conditions, such as when an adjustment has been posted during the reporting period.
8. Resolved a small UI defect in which scrollbars were being unnecessarily added to certain dialogs.
9. Addressed a small UI defect in the Location Schedule Planning UI in which the visual indicator for days with scheduled appointments was not being rendered correctly.
10. Fixed a defect in which the print preview of the Perio Chart was not displaying correctly under certain conditions.
11. Fixed an issue in the admin portal utility in which the initial / admin user was not being provisioned correctly when provisioning a new tenant under certain conditions.
12. Addressed a bug in the admin portal utility in which the list of tenants was not always fully and correctly displayed.

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kmccall

CS Dental Employee



03-16-2020 04:51 PM

Also, see the Help topic: [How to Create a Block Booking Template](#)

Add tags



0 Kudos

Accept as Solution

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DFletcher

CS Dental Employee



02-20-2020 08:14 AM

Great info - Thanks!!

Add tags



1 Kudo

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