MOD **kevin_moloney**
Moderator

02-24-2020 12:42 PM

CMP Weekly Release 0.0.0.4556 (Part 1)

Care Management Platform (CMP)

Weekly Release

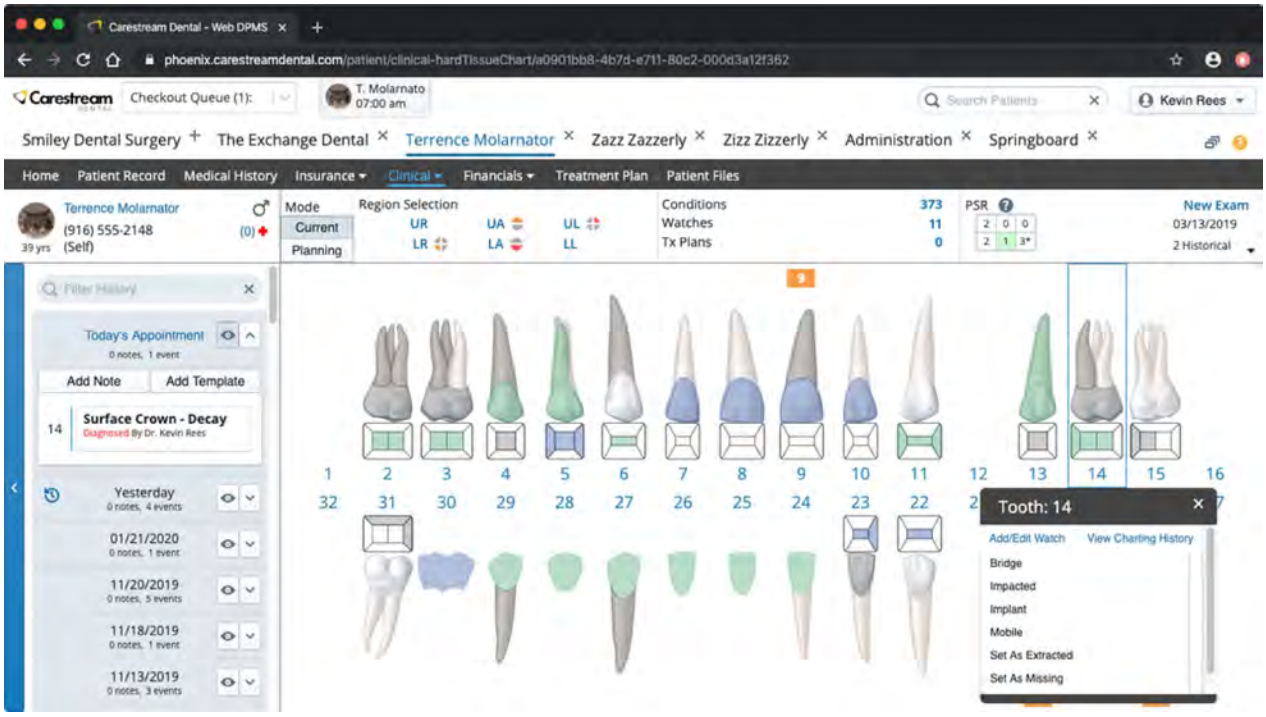
Build 0.0.0.4556 | February 24th, 2020

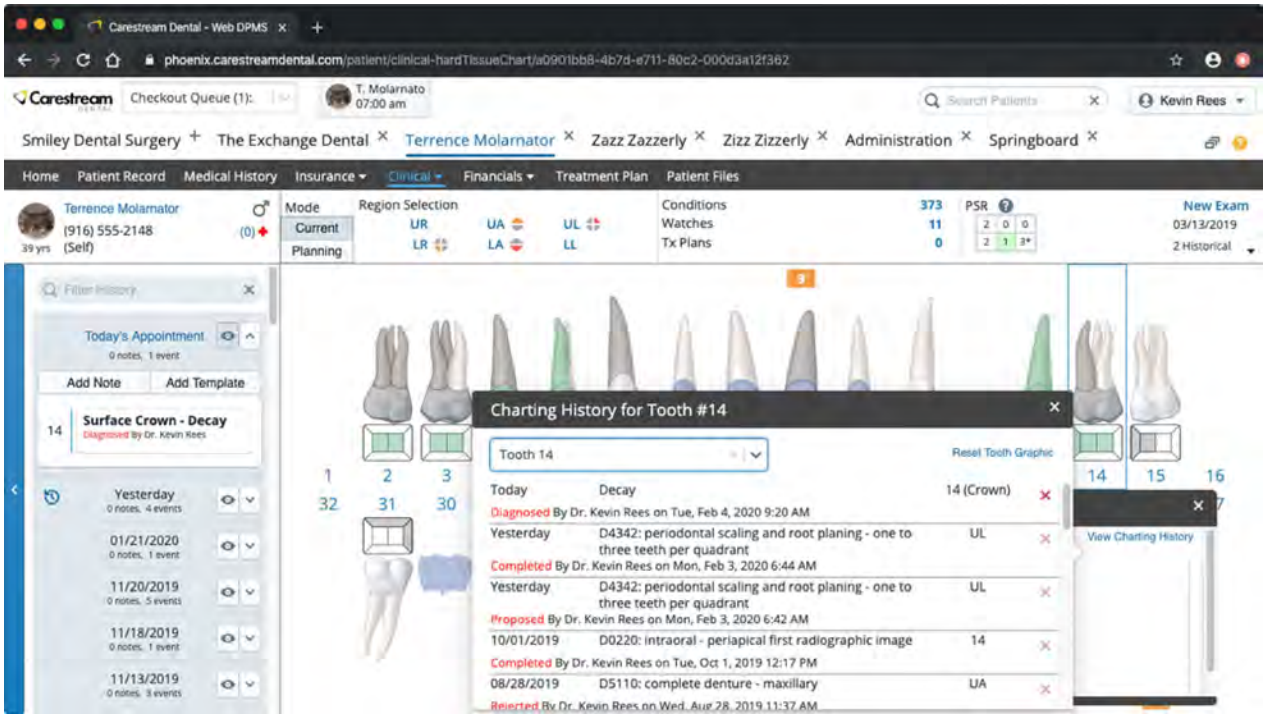
These are the highlights of the changes available in this week's Care Management Platform (CMP) release. It should be noted that this week's release contains several Voice of Customer items that deliver on recent requests from customers that are actively using CMP to operate their practices.

Correcting Charting History

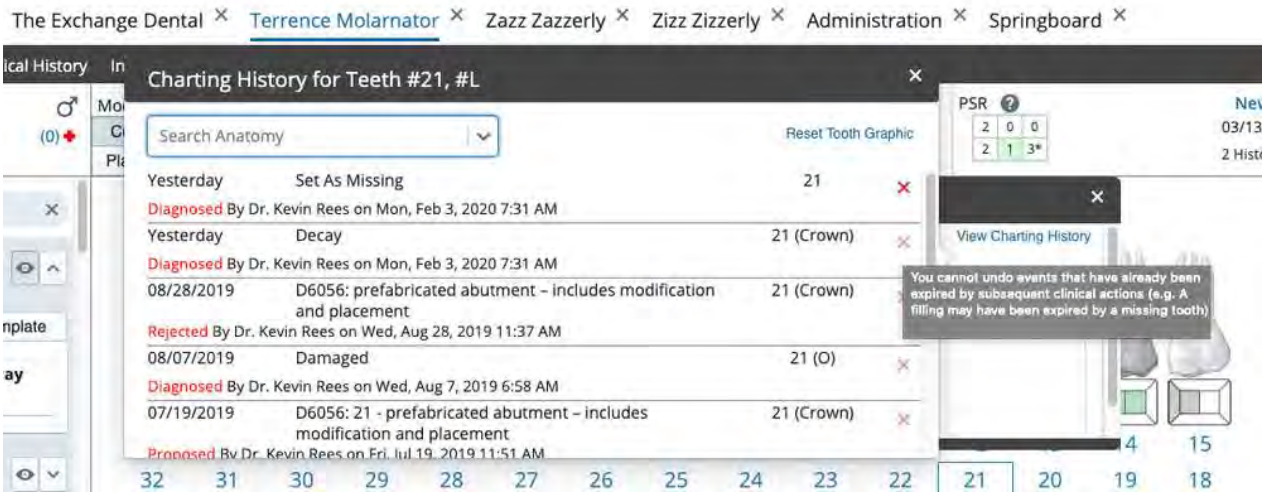
This week's release includes the ability for users to review - and correct - a patient's charting history via the Hard Tissue Chart UI. Chart corrections are handled via the new "View Charting History" option that is available whenever selecting anatomy in the Hard Tissue Chart UI. Per existing CMP functionality, once anatomy has been selected the charting tools dialog is displayed. Clicking

on the new “View Charting History” link displays the history of charted events for the selected anatomy in the Charting History dialog. It should be noted that when the user’s selection involves an anatomical region or multiple teeth, the complete charting history for all included anatomy is displayed. Users can filter this history down to a particular region or tooth, as desired. For charting events that can be corrected / undone, a new “Correct / Remove Event” (x) control is available.

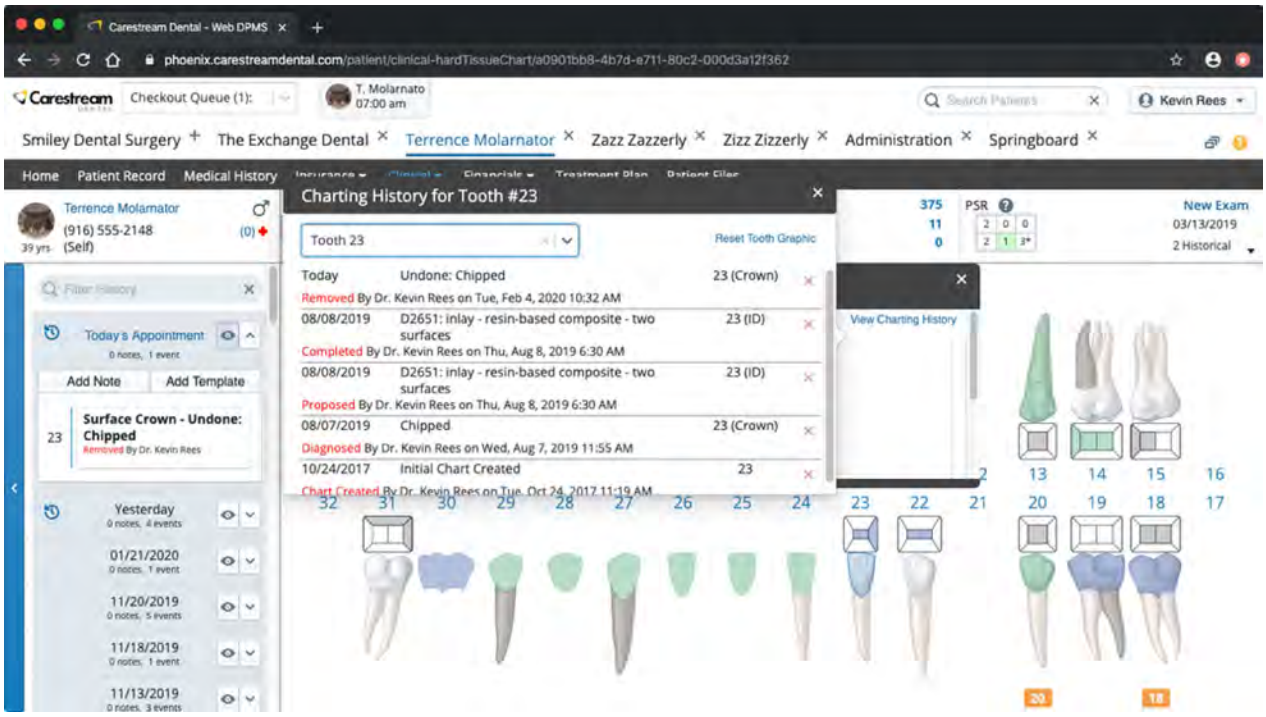


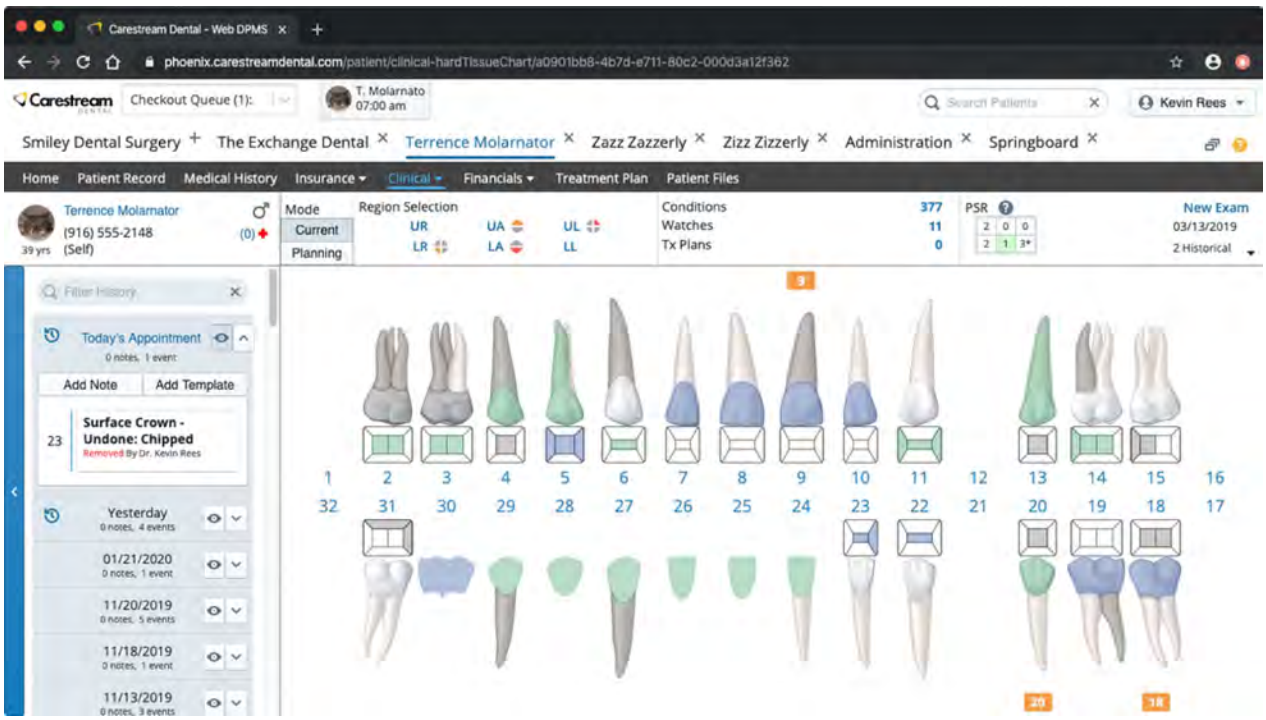


It should be noted that this functionality is currently limited to a subset of charting events, such as existing (outside) appliances or restorations and observed conditions. Whenever an item cannot be corrected, this control is disabled and an explanatory tooltip is provided. Planned or completed procedures cannot be undone via this dialog, but can be corrected via the existing workflows in the Patient Ledger UI (via charge adjustments for completed and posted procedures) or the Manage Treatment Plan dialog (via deleting or rejecting for planned procedures or UnCompleting for completed, but not posted procedures). It should also be noted that some events cannot be undone until a dependent, successive event has been corrected (e.g., previously charted decay on a crown cannot be undone if the tooth was subsequently extracted or charted as missing).



Clicking on the “Correct / Remove Event” control on a correctable event in the charting history will remove the finding from the associated anatomy, update the visual state of the Hard Tissue Chart UI (as applicable), and create a new clinical event note. Events that are charted and corrected on the same day will appear in the anatomy’s charting history, but will not retain clinical event notes in the hard tissue chart’s side panel. If previously charted events are corrected on a subsequent date, a new visual indicator is displayed on the the date container for the clinical event notes to highlight when charting corrections were made. Clicking here will display the chart correction details that happened, including the original charting event (that was corrected) and its correction.


Carestream Dental - Web DPMS
phoenix.carestreamdental.com/patient/clinical-hardTissueChart/a0901bb8-4b7d-e711-80c2-000d3a12f362
Carestream
Checkout Queue (1):
T. Molarnato
07:00 am
Kevin Rees
Smiley Dental Surgery
The Exchange Dental
Terrence Molarnator
Zazz Zazzerly
Zizz Zizzerly
Administration
Springboard
Home
Patient Record
Medical History
Terrence Molarnator
(916) 555-2148
(Self)
Charting History for Tooth #23
Tooth 23
Reset Tooth Graphic
Today Undone: Chipped 23 (Crown)
Removed By Dr. Kevin Rees on Tue, Feb 4, 2020 10:32 AM
08/08/2019 D2651: inlay - resin-based composite - two surfaces 23 (ID)
Completed By Dr. Kevin Rees on Thu, Aug 8, 2019 6:30 AM
08/08/2019 D2651: inlay - resin-based composite - two surfaces 23 (ID)
Proposed By Dr. Kevin Rees on Thu, Aug 8, 2019 6:30 AM
08/07/2019 Chipped 23 (Crown)
Diagnosed By Dr. Kevin Rees on Wed, Aug 7, 2019 11:55 AM
10/24/2017 Initial Chart Created 23
Chart Created By Dr. Kevin Rees on Tue, Oct 24, 2017 11:19 AM
View Charting History
375
11
0
PSR
New Exam
03/13/2019
2 Historical
Today's Appointment
Add Note
Add Template
23 Surface Crown - Undone: Chipped
Removed By Dr. Kevin Rees
Yesterday
01/21/2020
11/20/2019
11/18/2019
11/13/2019


Carestream Dental - Web DPMS
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Carestream
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Home
Patient Record
Medical History
Insurance
Clinical
Financials
Treatment Plan
Patient Files
Terrence Molarnator
(916) 555-2148
(Self)
Mode
Current
Planning
Region Selection
UR
UA
UL
LR
LA
LL
Conditions 377
Watches 11
Tx Plans 0
PSR
New Exam
03/13/2019
2 Historical
Today's Appointment
Add Note
Add Template
23 Surface Crown - Undone: Chipped
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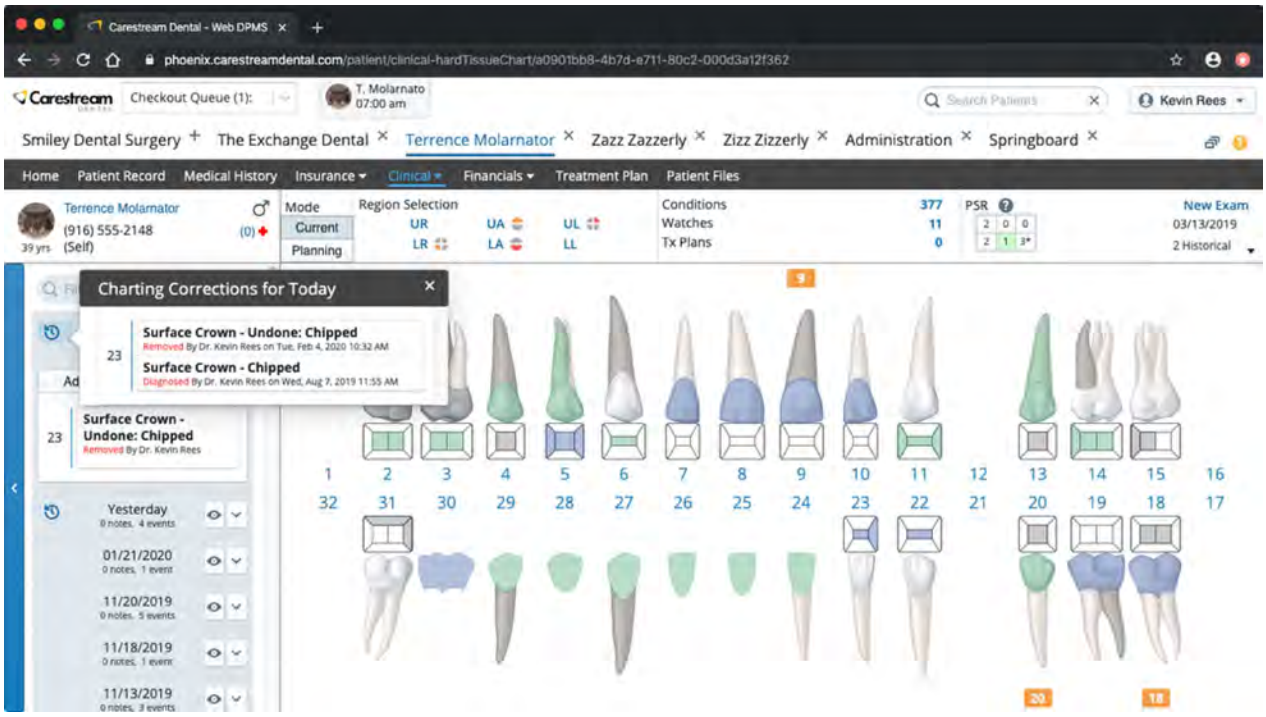
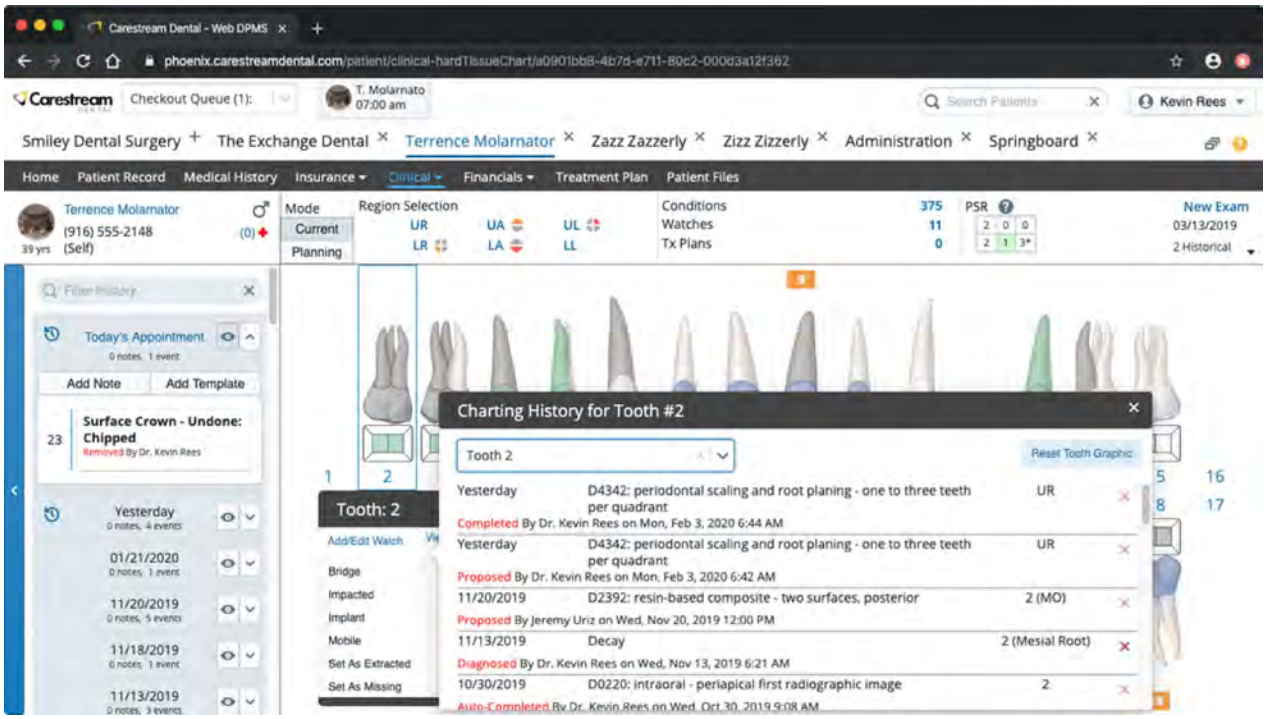
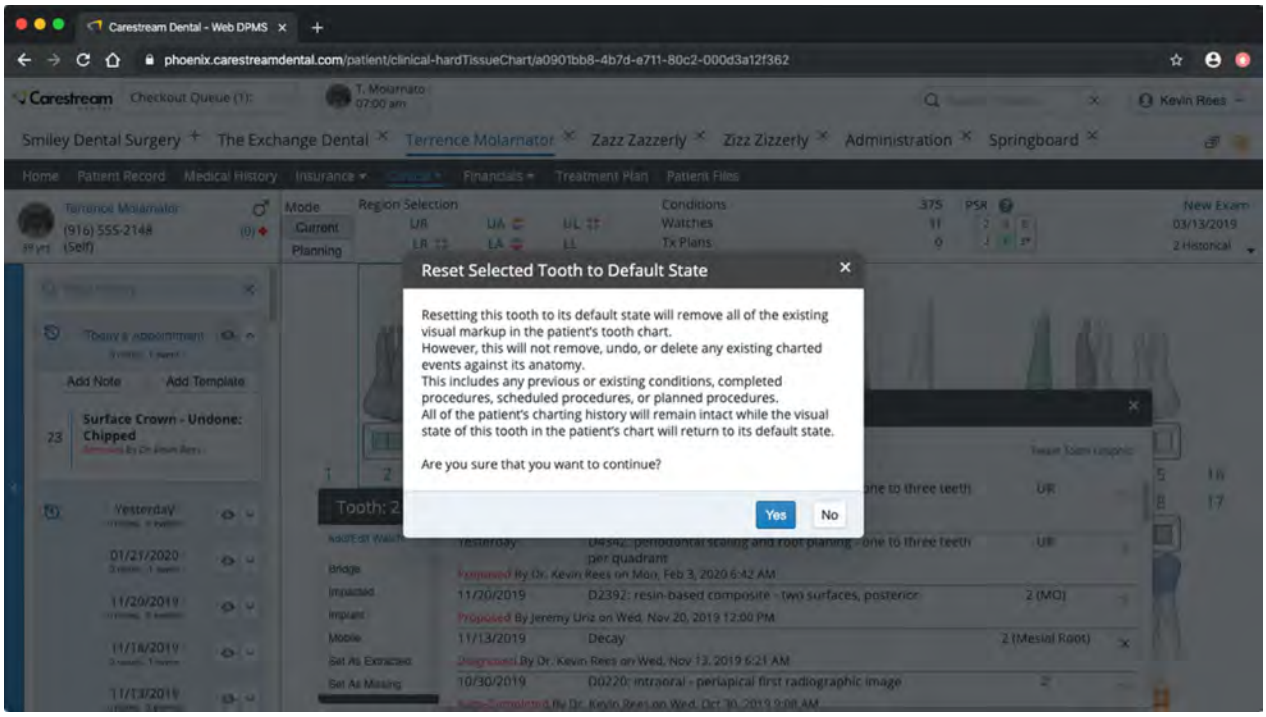
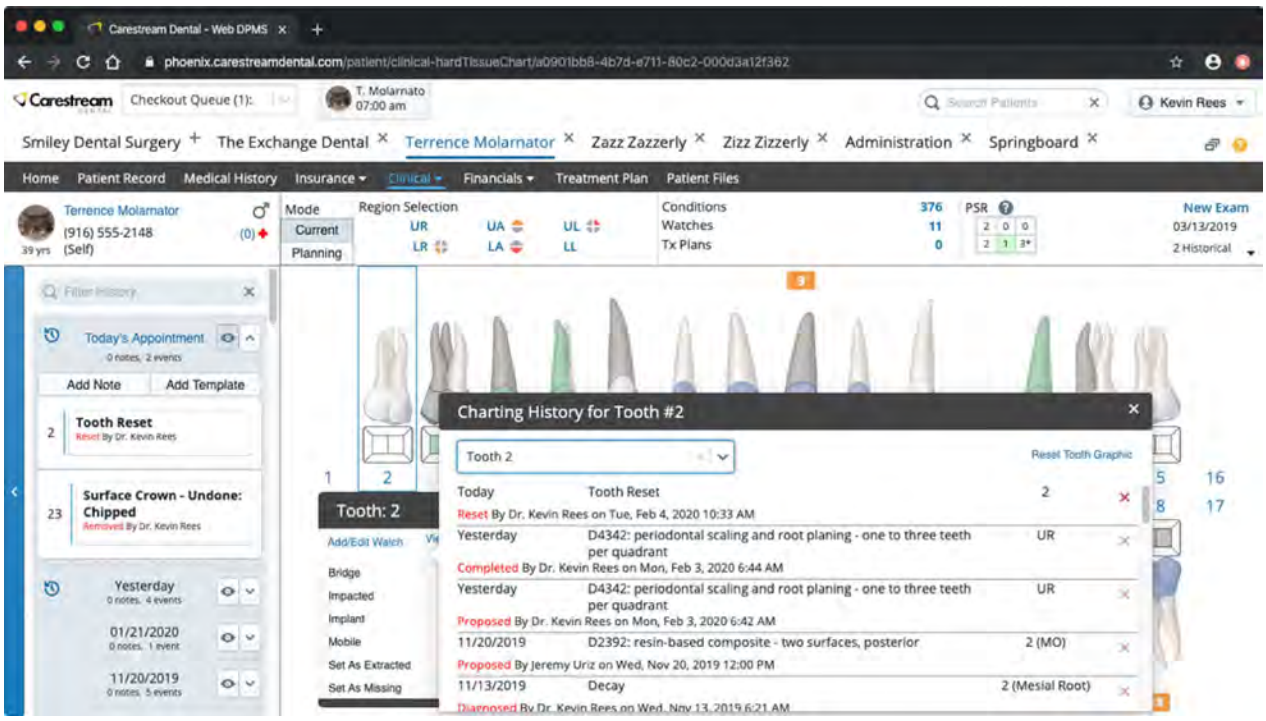
11/13/2019



Users also have the option to completely reset the visual representation of the tooth, by clicking on the new “Reset Tooth Graphic” (or “Reset Teeth Graphics” when multiple teeth selected) in the Charting History dialog. Clicking this link will prompt users with a confirmation dialog explaining what will happen as a result of this action (e.g., tooth graphical representation visually reset, but no removal of charting history). Once reset, the tooth artwork will reset to its default state, removing any visual markup, but will leave any existing charting history intact.



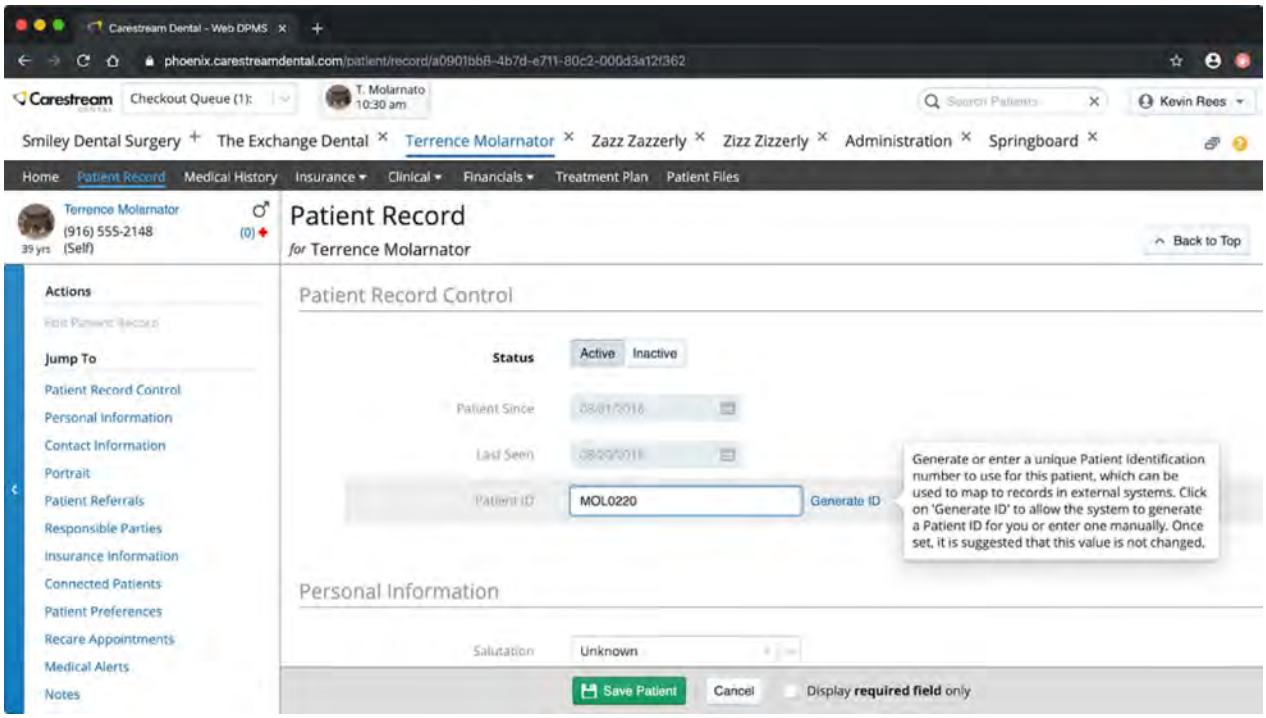


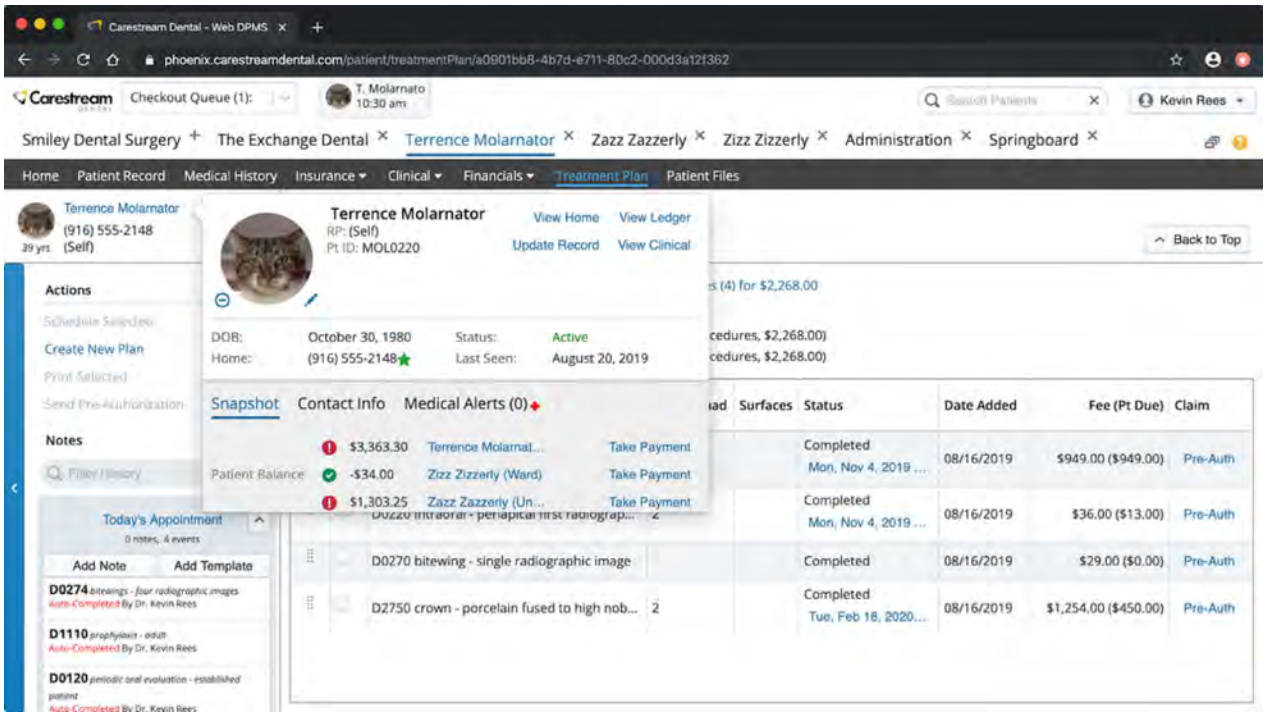


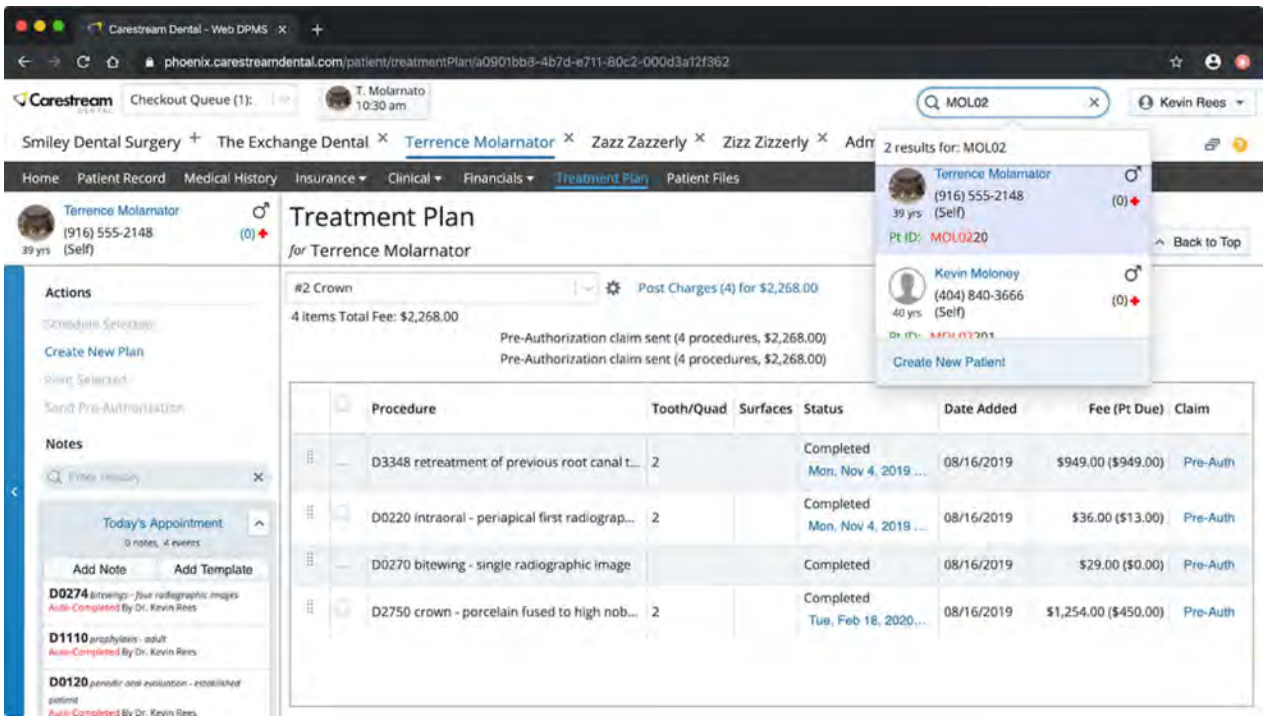
While currently limited to existing (outside) work and conditions, CMP users are now able to ensure that the patient's odontogram is free from simple charting mistakes and expired conditions. We are excited to provide this functionality to CMP users and look forward to hearing how these new capabilities support the practice's clinical workflows. Planned enhancements include extending the chart correction functionality to potentially include items that have been planned and/or completed as well as handling modifications to properties of an event (e.g., correcting associated tooth number, surfaces, or material).

Defining a Patient ID

This week's release also includes a key enhancement to the Patient Record UI - the addition of an identification number that can be assigned to the patient. This allows CMP users to link patient records in CMP to associated records in external systems, such as existing paper records and/or 3rd party imaging, labs, or referral systems. CMP users can now enter an ID into the CMP patient record which corresponds to an existing ID used for the same patient in some external system. Alternatively, users can automatically generate a unique patient ID in CMP that can be used to identify the patient in an external system.







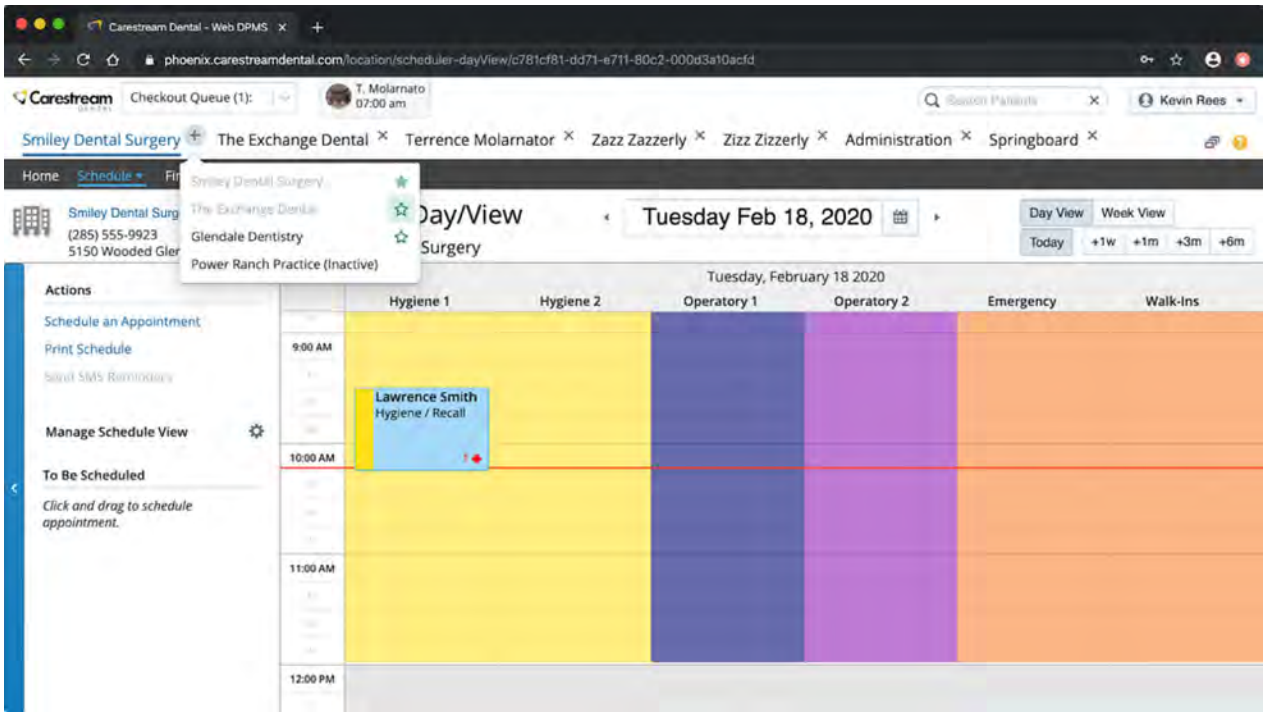
Aside from the Patient Record UI, the patient ID is now displayed in the Patient Snapshot UI and can also be used as a search term when finding patients in CMP. CMP will also prompt users when trying to change the existing, defined Patient ID value to prevent any inadvertent changes to an established ID. These enhancements will greatly ease workflows involving the matching of a patient in CMP to existing (or new) records maintained in external systems. This will be especially helpful for practices that maintain legacy records on paper (or other DPMS systems) and/or prefer to use 3rd party imaging tools.

Improved Support for Multi-Location Workflows

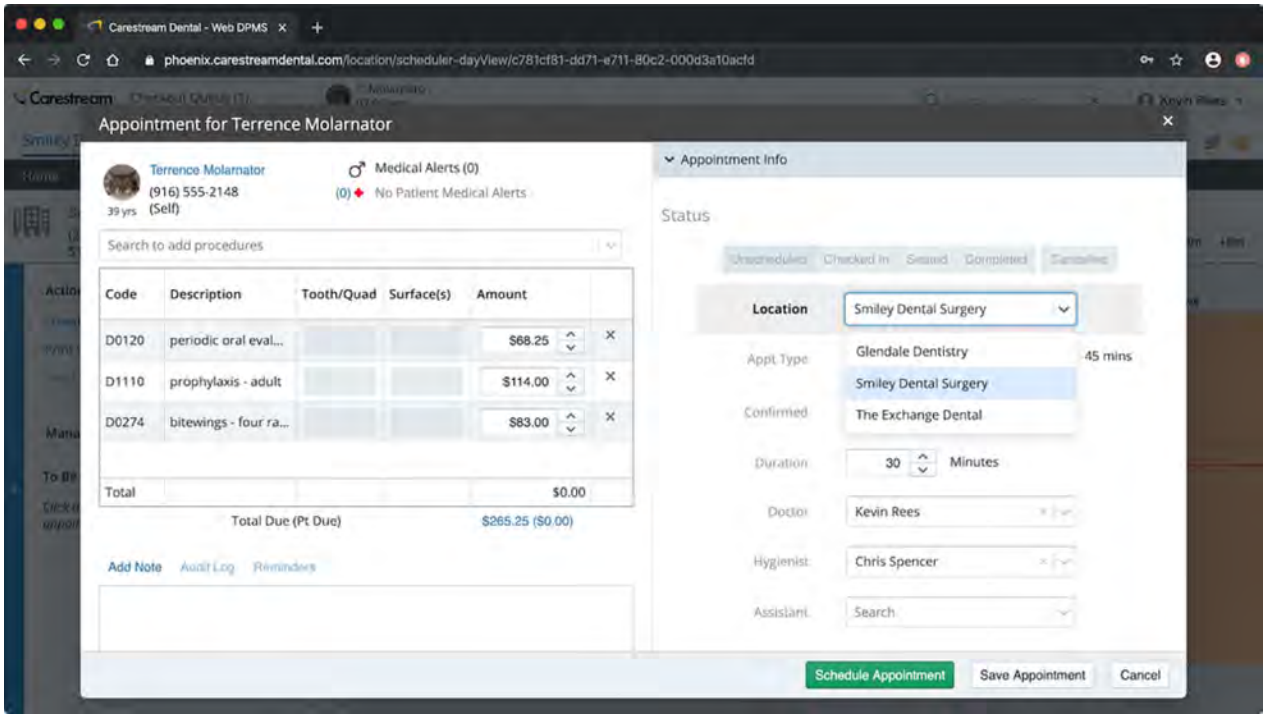
This week's release greatly enhances support for multi-location workflows, making it easier for CMP users associated with multi-location practices to handle common work contexts. This includes handling situations such as a user that works out of different locations on different days or when an appointment needs to be rebooked to a different location. Specifically, this includes:

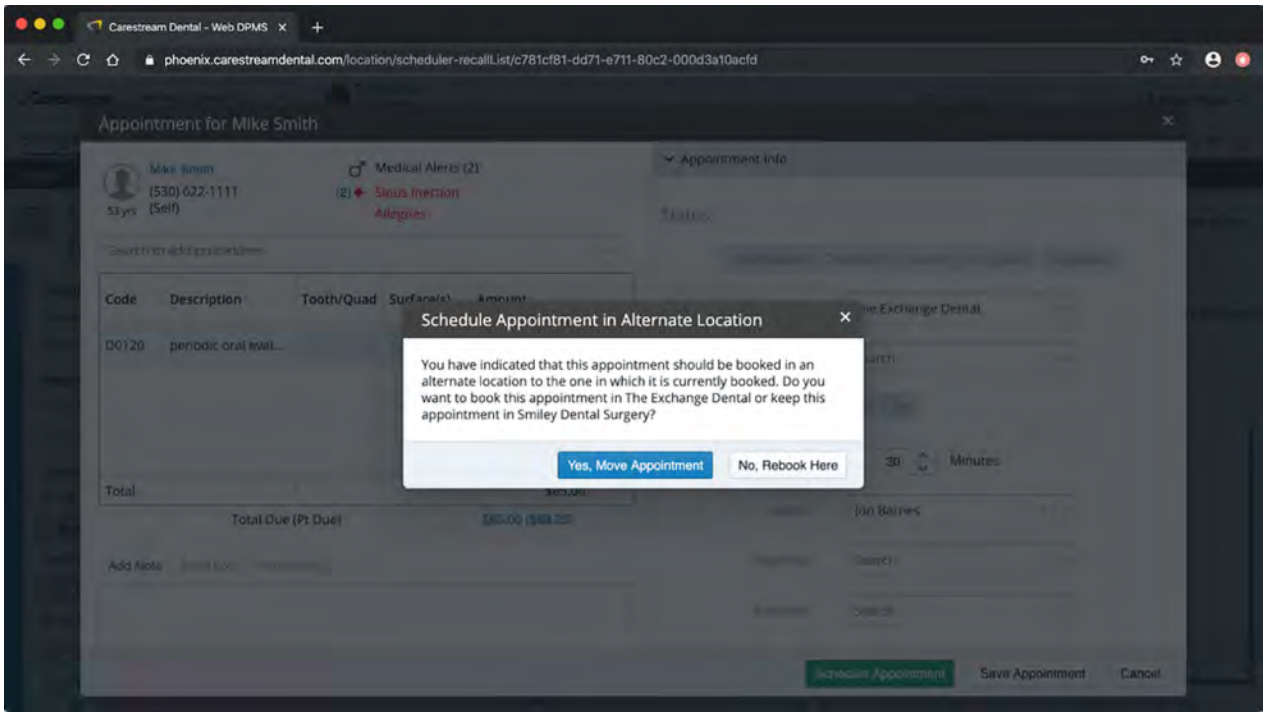
- Allowing the user to easily switch his currently "logged in location" to change his location context and provide access to workflow tools such as the Waiting and Checkout Queues;
- Allowing users to set (and change, when appropriate) the associated location of an appointment via the Appointment Card UI, to improve cross-location appointment rebooking workflows;
- Notifying the user when he is trying to manage an appointment that is occurring in a location that doesn't match his current "logged in location" to more easily facilitate workflows such as appointment checkout;
- Prompting the user to assign contextual details such as service location (and provider and date) when procedures and/or treatment plans are completed outside of the context of a scheduled appointment, to help ensure that the work is appropriately documented; and
- Allowing users to set the associated service location on a procedure-basis when posting completed work as charges to accommodate workflows in which items associated with different locations are being posted at one time.

As mentioned above, users can now easily switch their currently logged in (working) location via the leftmost Location Tab. If the practice has multiple locations, clicking on the + control will display the list of available locations. The user's current logged in location will be indicated with a new "star" control. Clicking on the "star" of another location will quickly swap the user's current logged in location. Clicking on the location's name will open the Location Tab.

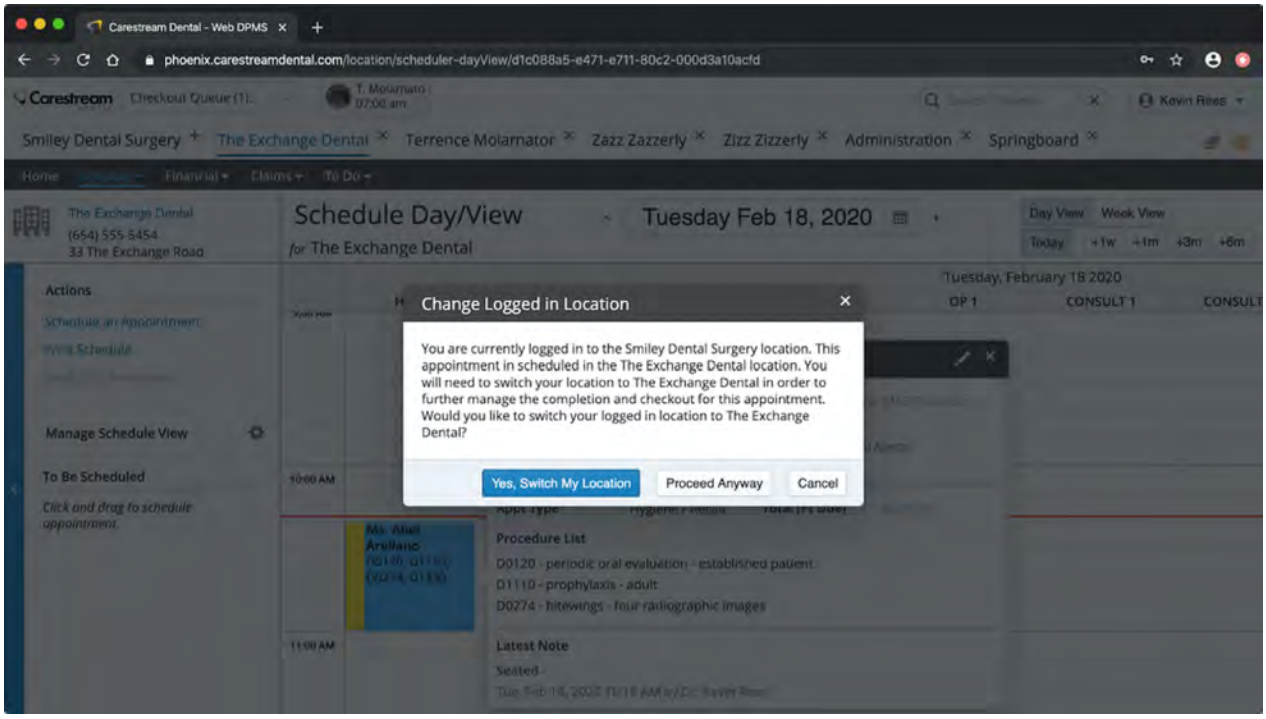


Users can also now assign and/or change the location associated with an appointment via the Appointment Card UI (depending on context). The appointment's location is now displayed via the Appointment Card UI, which is automatically set - or fixed - when an appointment is created through a location-based context (e.g., via a location's Schedule DayView UI). When rebooking, users can also now change the appointment's associated location, making it much easier to move existing appointments between locations. CMP users are also now sometimes prompted when trying to move an existing appointment to a different location (e.g., via one of the scheduling lists).



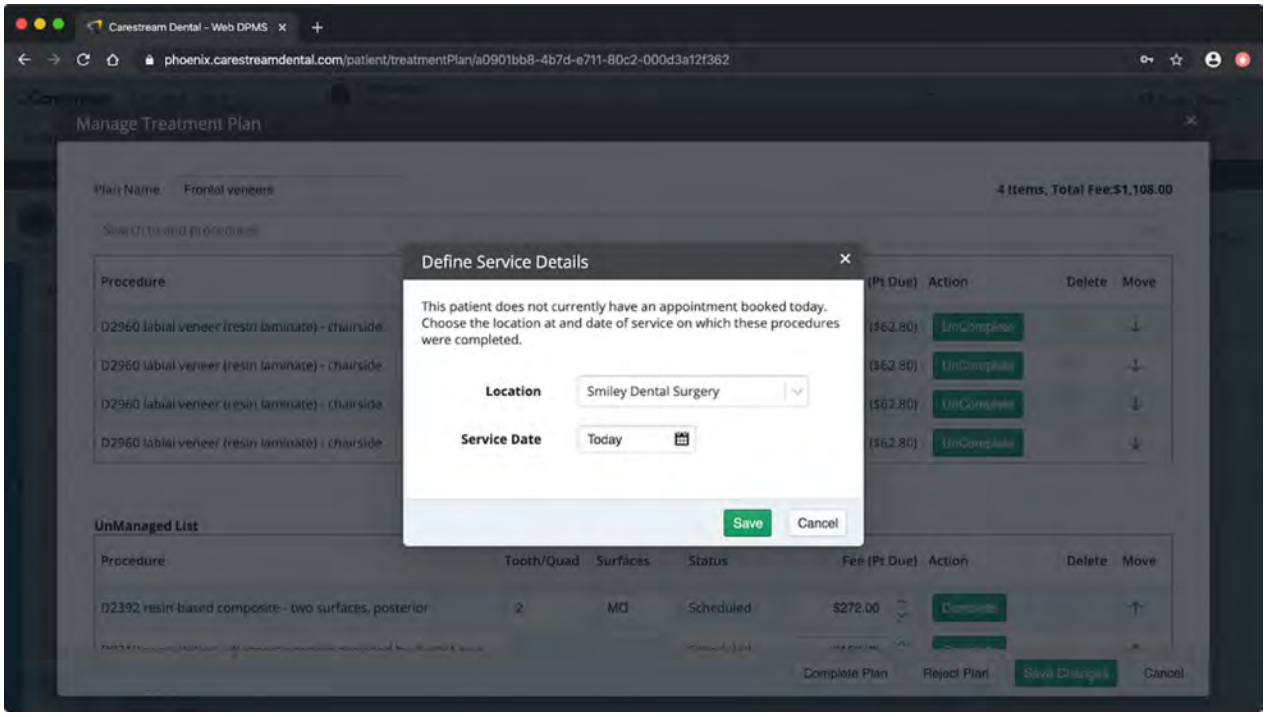


CMP users are also now prompted when trying to complete an appointment occurring in a location different from their current logged in location. This provides users with both an awareness, and an opportunity, to switch their current location which will allow them to manage the checkout of the selected appointment by providing access to the associated Checkout Queue.

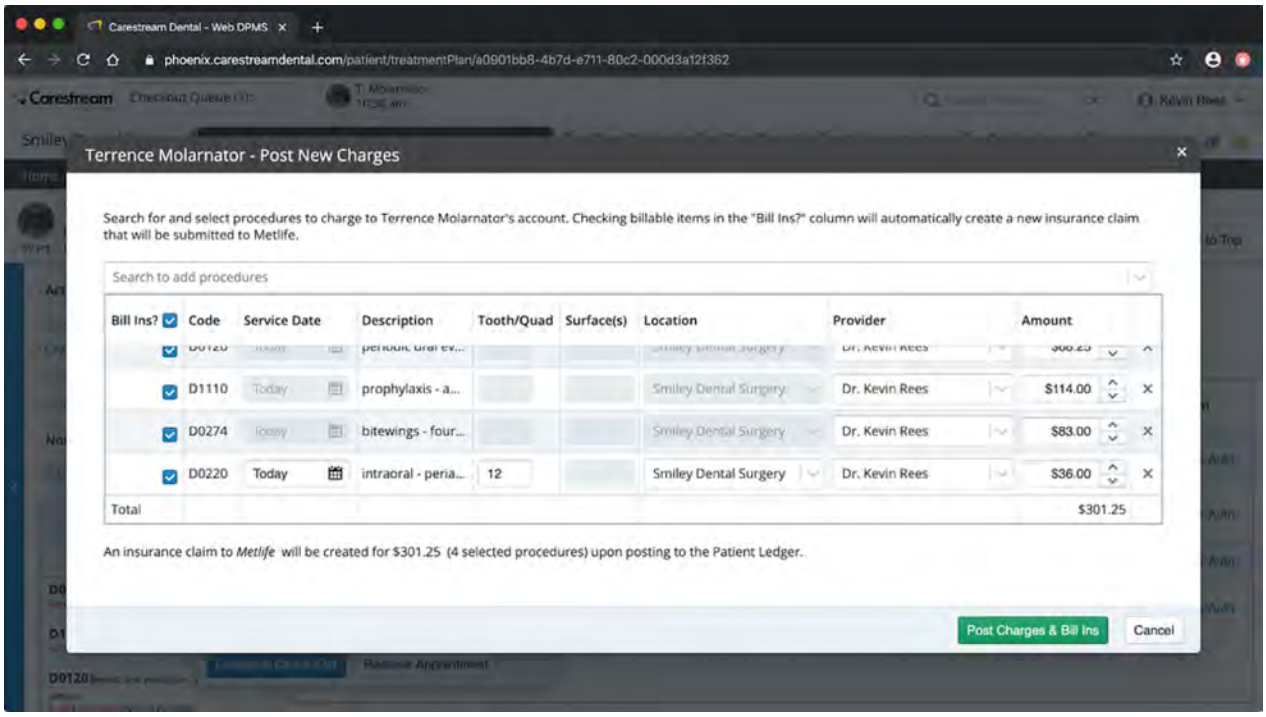


CMP also now prompts users to define the associated service location when completing work in the absence of a scheduled appointment (e.g., completing directly via a treatment plan). This provides users with the opportunity to

define the service details for completed work at the time it is done, ensuring that all of the necessary documentation is made for future posting and/or claiming. Note that, if there is a currently active appointment for the patient on the same day, then CMP will automatically associate these procedures with the existing appointment.



Lastly, CMP users are now able to define the service location on a procedure-by-procedure basis when posting new charges, allowing for more flexible posting workflows. This change allows users to post charges, originating from multiple locations, at the same time. Now, the location associated with existing, completed work is automatically set based on the procedure's service location - even in the absence of an appointment checkout context. Also, intelligent defaults have been implemented that determine the most likely location to assign to manually added charges, based on the user's current context (although the user can freely change this value before posting).



We are excited to provide these enhancements to our users. We look forward to hearing how these changes have improved common multi-location workflows for our users and any additional enhancement ideas to handle multi-location contexts. Planned enhancements include the addition of associated location details to several UIs throughout the application as well as the ability to manage repetitive tasks for all locations at once (e.g., practice-wide, “all locations” actionable lists).

[TO BE CONTINUED IN PART 2...]

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