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CMP Weekly Release 0.0.0.4556 (Part 2)

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4556 | February 24th, 2020

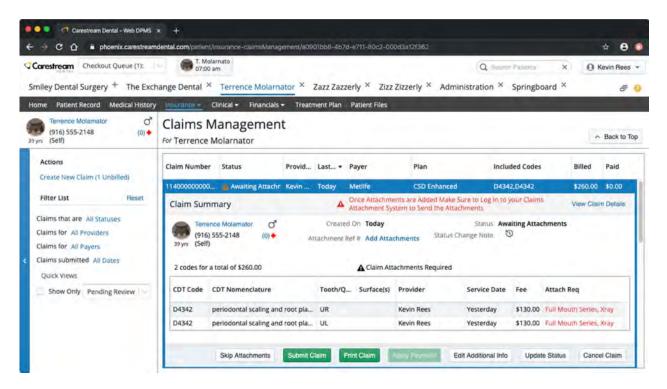
These are the highlights of the changes available in this week's Care Management Platform (CMP) release. It should be noted that this week's release contains several Voice of Customer items that deliver on recent requests from customers that are actively using CMP to operate their practices.

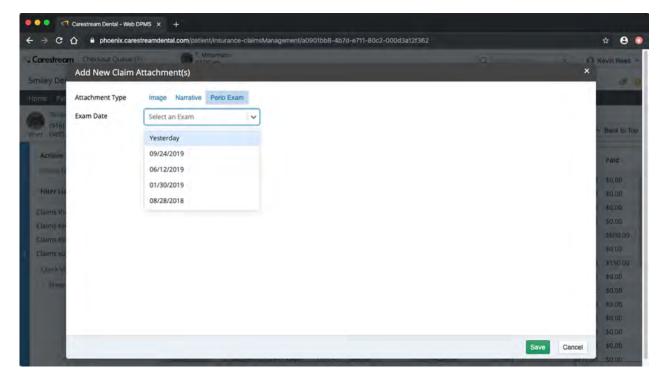
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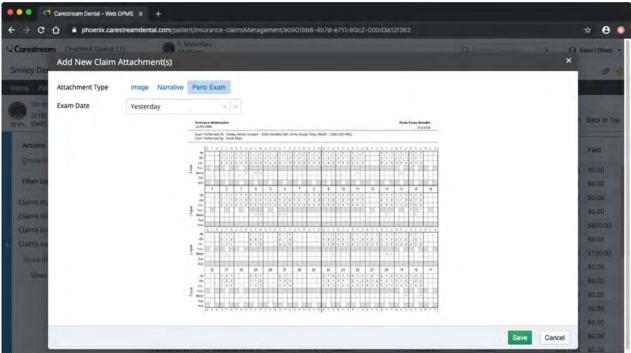
Perio Exams as Claim Attachments

This week's release also extends the existing NEA *Fast*Attach-based electronic claims attachment functionality in CMP, originally implemented and documented in April 2019. Users can now add a copy of a patient's existing perio exam as supporting documentation on a pre-authorization claim or claim for actual services. This fills an existing gap in the workflow support for electronic claim attachments and processing in CMP.

This update utilizes the existing electronic claims attachments workflow. When available (e.g., when the payer accepts electronic claims attachments), CMP users can click "Add Attachments" to add supporting documentation to the selected claim record. Via the Add New Claim Attachment(s) dialog, users can now click "Perio Exam" and then select from one of the existing dates on which a perio exam was recorded. A preview of the selected exam - using the same format as the printed perio exam - will be displayed for visual confirmation. Once saved, the user can then submit the claim and follow the existing workflow via the NEA *Fast*Attach service to confirm and send any electronic claim attachments to the payer.







We hope that this expanded support for claims-based workflows helps our users with claim and pre-authorization adjudication involving perio work. We look forward to any feedback on this new functionality.

General Workflow Efficiencies

This week's release also includes a series of enhancements aimed at improving various workflow inefficiencies that have been reported by our users and internal stakeholders. While more improvements are still in the works, the

current list of workflow enhancements includes:

- Recognizing the Enter / Return key to execute the "Create New Patient" workflow (e.g., open the "Create Patient" dialog) as opposed to a click on the existing link when no search results are produced from a query in the global patient search control (via global Patient Search → [no search results] → Create Patient).
- Automatically marking the resulting tooth as "Set as Present" when switching a primary tooth to its permanent counterpart (or vice versa), so that it is visually present and available for charting without having to chart the "Set as Present" event (via Patient Tab → Hard Tissue Chart → [select tooth] → Change to [Primary / Permanent] [#]).
- Adding the ability to resend the "Welcome to CMP" invitation email to
 Team Members to more easily support the onboarding of new team
 members and handle the cases where the user lost the original email or
 the link to register is now invalid (via Administration Tab → Team
 Members → Selected Team Member).
- Modifying the order of the options in the Relationship field for Responsible Parties so that the most likely values used are at the top (Patient Tab → Patient Record → Responsible Parties → [select relationship]).
- Automatically defaulting all alpha characters as capitalized when entering in the Tooth/Quad and Surface(s) fields when scheduling, planning, or posting procedures (e.g., Appointment Card UI, Manage Treatment Plan UI, Post New Charges UI).
- Intelligently maintaining the manually-specified Service Date value when
 entering multiple charges to the Patient Ledger, to avoid having to reset
 the service date value for every additional procedure added during the
 posting workflow (via Patient Tab → Ledger → Post New Charges → [add
 procedures as new charges + change service date]).

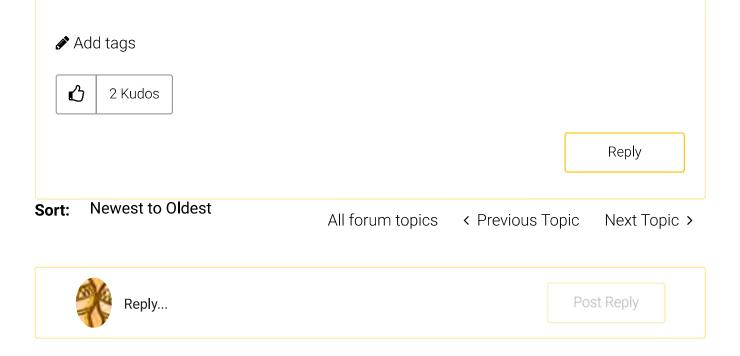
We are happy to provide these improvements to workflow support and look forward to any feedback. Additional planned enhancements include establishing new default values in the Patient Record UI to streamline the creation of new patient records, adding associated anatomy details to procedures in screens throughout the application to remove the additional click required to find out what tooth or surface(s) are involved with a procedure, and hiding inactive patient records by default when searching for patients.

Optimizations and Fixes

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

- Resolved a defect in which an inaccurate date of service would sometimes be displayed for back-dated procedures when printing claims.
- 2. Addressed a problem which would prevent users from saving a treatment plan when it contained multiple procedures linked to the same insurance claim.
- 3. Resolved an error that affected the user's ability to edit an existing plan once part of the plan was completed and claimed.
- 4. Updated the layout of the Applied Payments report to separate each producer's collections to isolated pages / sections.
- 5. Added an "Unknown" gender option to the Patient Record to accommodate the updates to 2019 ADA claim form.
- 6. Fixed a bug in the resets recare logic in which the posting of "resets recare" procedures to the patient's ledger (outside of a scheduled recare appointment) was not resetting the patient's recare status and calculated date.
- 7. Addressed an issue in the claim printing functionality in which the Billing Dentist section was populated even when Assignment of Benefits was not enabled for the patient's insurance.
- 8. Fixed a defect in the claim printing functionality in which some of the ADA form fields were mapped to the incorrect provider information in some cases.
- 9. Resolved an issue in which the nightly email reminders about pending claims that need to be addressed were not being sent out due to a failing webjob.
- 10. Addressed a UI defect which would sometimes prevent the user from scrolling through the list of search results in the global patient search when the browser's zoom level has been manually adjusted.
- 11. Adjusted the Treatment Type (and Anatomy Type) associated with a particular CDT code (D6999) to correct the anatomy requirements when scheduling / posting / claiming the procedure.
- 12. Fixed a UI defect in which the hover-triggered popovers in the Schedule DayView UI would sometimes visually occlude one another when reviewing information about an appointment.

- 13. Addressed an issue in which the sealant options were not always available when charting in the Hard Tissue Chart UI.
- 14. Fixed a problem in the Admin Console application in which the Azure blob storage account was not always configured when creating a new customer tenant.
- 15. Resolved a UI defect in the Block Booking Template creation workflow in which the current day's working hours were inadvertently being visually represented.
- 16. Fixed a UI defect in the Patient Snapshot UI in which the patient's insurance record was always flagged as being incomplete.
- 17. Addressed a UI defect in the Patient Homepage UI in which the insurance Payer was not being correctly displayed when executing the update payer workflow.
- 18. Fixed a defect in which the user's reordering of the procedures / items in a patient's treatment plan was not saved and reflected when reviewing the treatment plan.
- 19. Addressed a visual defect in the Patient Snapshot UI in which some of the content and controls were misaligned.
- 20. Resolved an interaction defect that would create backend errors when clicking and dragging to select a block of time that involved multiple chairs.



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