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03-24-2020 08:37 AM

CMP Weekly Release 0.0.0.4679

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4679 | March 24th, 2020

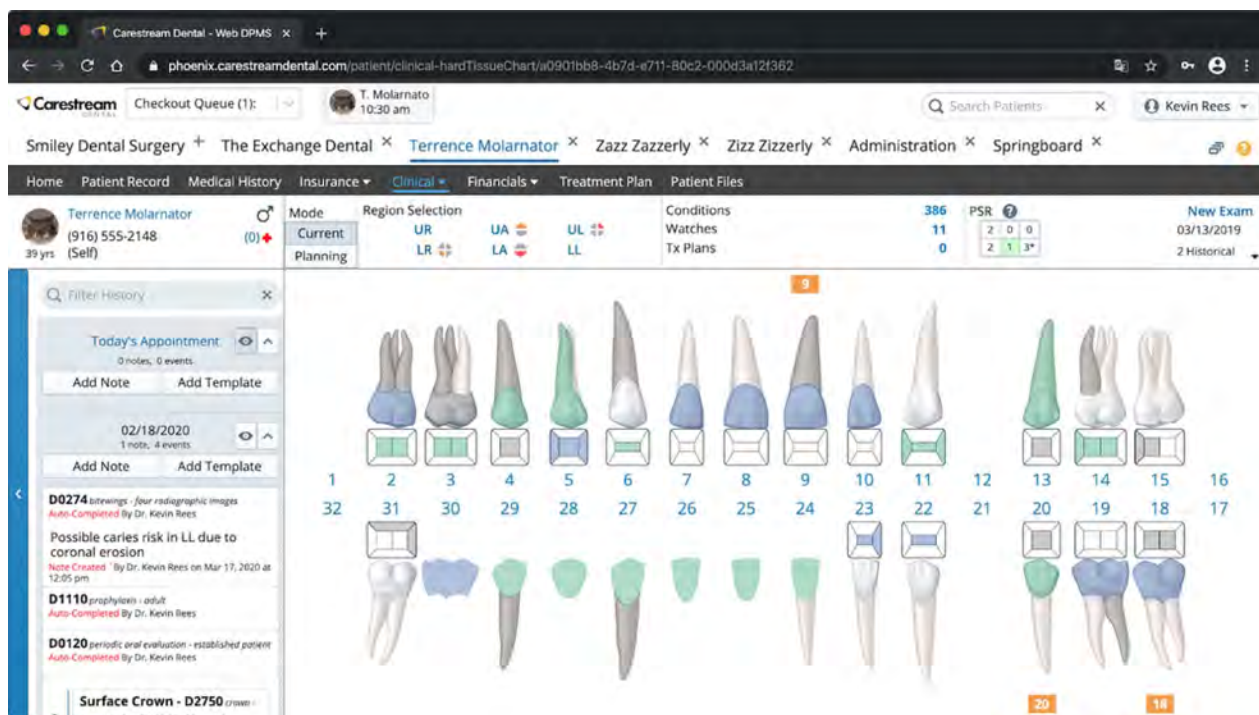
This week's CMP updates continue to expand core application functionality and deliver on recent customer requests.

Enhancements to Clinical Notes



CMP now provides more flexibility when documenting clinical care in the Hard Tissue Chart. Enhancements to the clinical event notes in the side panel enable you to edit or remove (hide) existing notes that were added during

previous visits or dates. You can also add new clinical notes to a previous visit / date and add multiple notes to a clinical finding, such as a diagnosed condition or a planned procedure.

There are now several new capabilities for post-hoc management of a patient's clinical notes via the Hard Tissue Chart. Use the 'Add Note' and 'Add [Note] Template' controls to add visit- or date-based clinical notes to a previous visit's record of care. Simply hover over the visit date to display the note controls. You can expand the visit's details by clicking on the arrow or caret button, which provides a view of that date's clinical history and access to the note controls. Click on the add note buttons to add free-form or templated clinical notes to the previous visit, just as you would for a current day visit.





Procedure- or item-level clinical notes can also be added to a previous visit's record. The mechanism is the same as that used for today's visit. Simply hover over the existing finding or planned procedure, and click to enter a new note. You can also now add multiple clinical notes to a single item. Hovering over the item (e.g., the finding or procedure) will display the add note indicator, enabling you to make additional notes.

Today's Appointment  

0 notes, 0 events

Add Note **Add Template**

02/18/2020  

1 note, 4 events

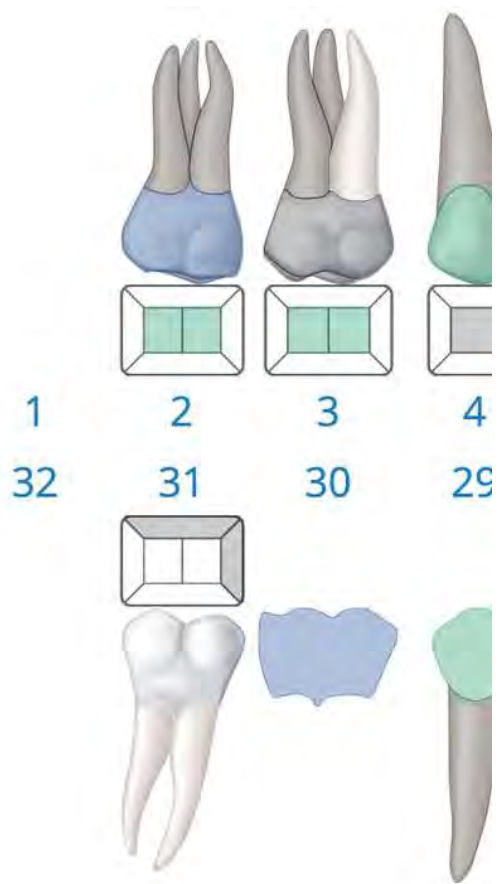
Add Note **Add Template**



D0274 *bitewings - four radiographic images*
Auto-Completed By Dr. Kevin Rees

Possible caries risk in LL due to coronal erosion
Note Created By Dr. Kevin Rees on Mar 17, 2020 at 12:05 pm

D1110 *prophylaxis - adult*
Auto-Completed By Dr. Kevin Rees
 -----Click to type-----

D0120 *periodic oral evaluation - established patient*
Auto-Completed By Dr. Kevin Rees



02/18/2020  

1 note, 4 events

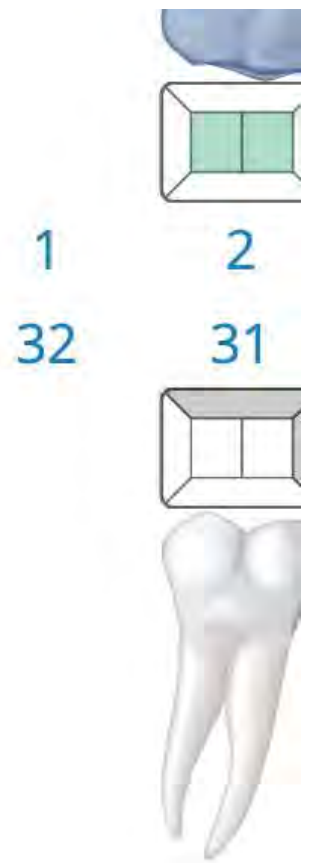
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Auto-Completed By Dr. Kevin Rees

D0120 *periodic oral evaluation - established patient*



Hovering over an existing clinical event note displays new controls you can use to modify the existing note text or remove (hide) the note, as appropriate.

NOTE: Whenever an existing note is edited or removed, an indicator is displayed on the associated item to document the change. Click on this 'history' indicator to display the associated clinical note history, including the original note text, the user that committed the action, and the date and time of the edit. The one exception to this is when you remove your own note on the same day it was made, and the note has not been edited. Those notes are removed entirely to keep the patient's records clean of aberrant notes.

02/18/2020
1 note, 4 events

⏏ ⏶

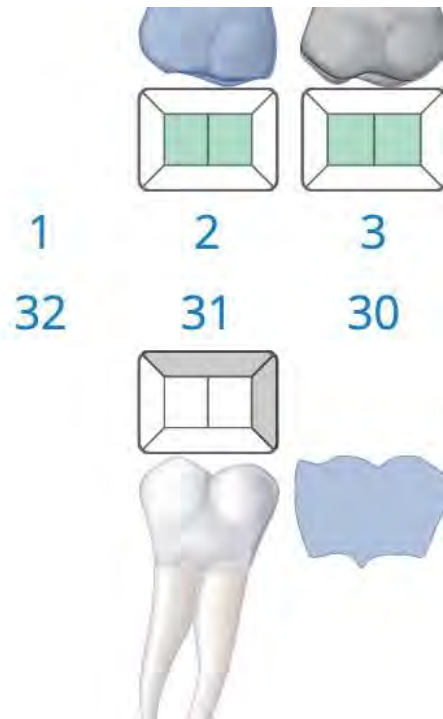
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D1110 *prophylaxis - adult*
Auto-Completed By Dr. Kevin Rees

D0120 *periodic oral evaluation - established patient*



Today's Appointment

0 notes, 0 events

Add Note **Add Template**

02/18/2020

3 notes, 4 events

Add Note **Add Template**

D0274 bitewings - four radiographic images
Auto-Completed By Dr. Kevin Rees

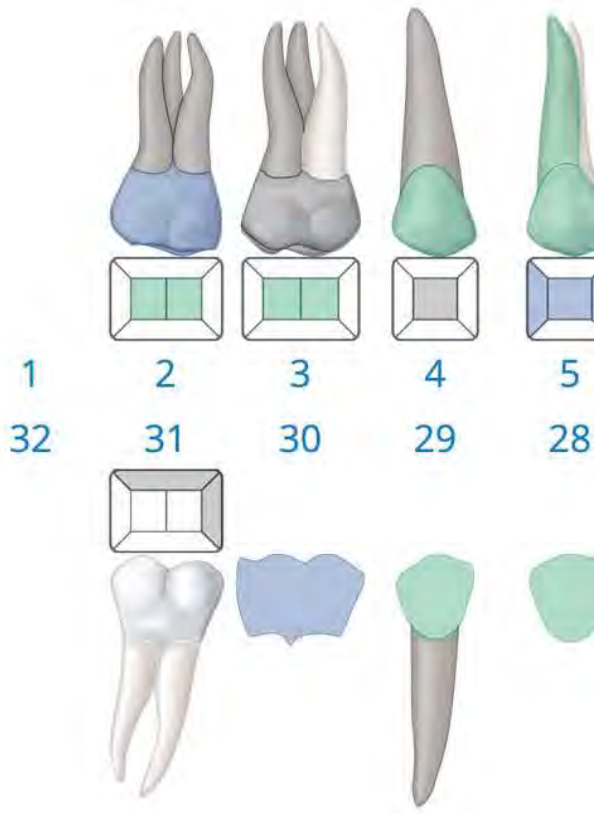
Possible crack in #18 M
Note Created By Dr. Kevin Rees on Mar 17, 2020 at 03:56 pm

Possible caries risk in LL due to coronal erosion
Note Created By Dr. Kevin Rees on Mar 17, 2020 at 12:05 pm

D1110 prophylaxis - adult
Auto-Completed By Dr. Kevin Rees

Poor hyg in upper posterior and lower anterior. Hyg instruction provided. Floss samples provided.
Note Updated By Dr. Kevin Rees on Mar 17, 2020 at 03:55 pm

D0120 periodic oral evaluation - established patient



02/18/2020

3 notes, 4 events

Add Note **Add Template**

D0274 bitewings - four radiographic images
Auto-Completed By Dr. Kevin Rees

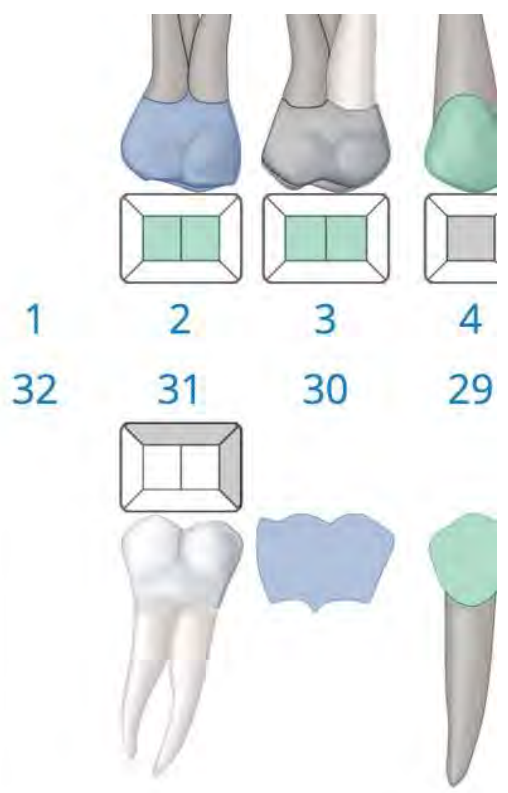
Possible crack in #18 M
Note Created By Dr. Kevin Rees on Mar 17, 2020 at 03:56 pm

Possible caries risk in LL due to coronal erosion

Poor hyg in upper posterior and lower anterior. Hyg instruction provided. Floss samples provided.
Note Updated By Dr. Kevin Rees on Mar 17, 2020 at 03:55 pm

Poor hyg in upper posterior. Hyg instruction provided.
Note Created By Dr. Kevin Rees on Mar 17, 2020 at 03:54 pm

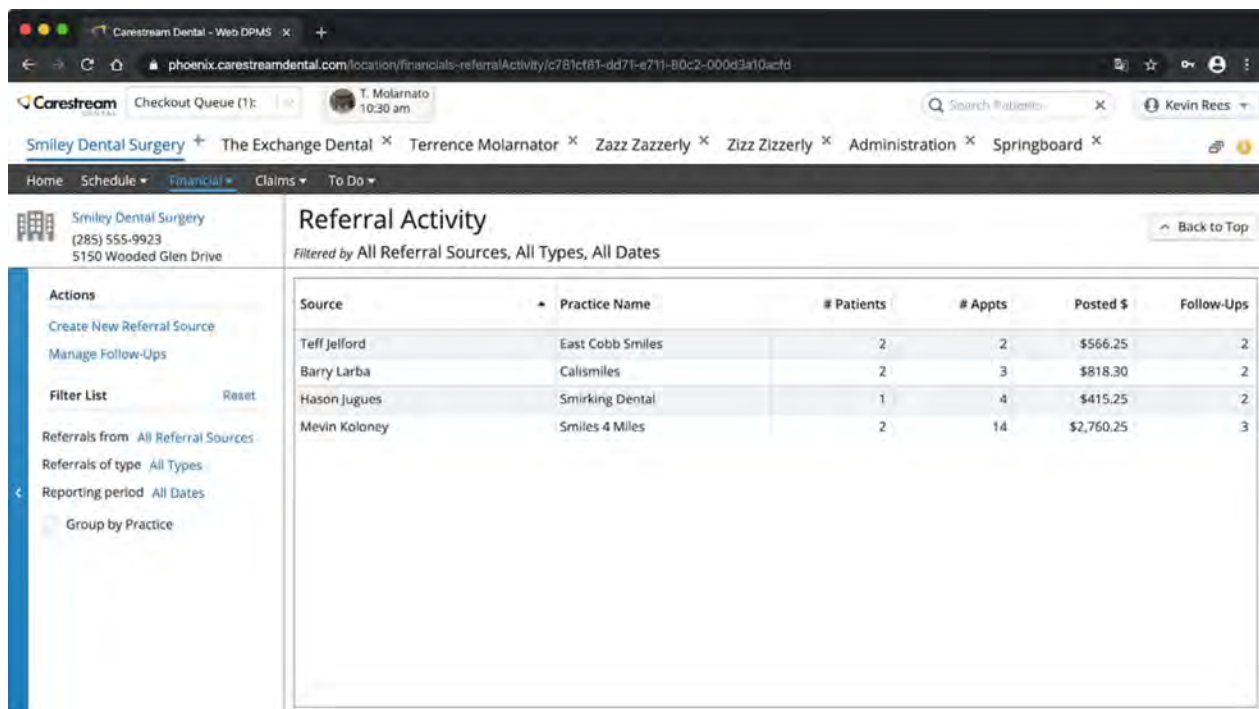
D0120 periodic oral evaluation - established patient



We hope that this new functionality will make the documentation of clinical care easier and more flexible, accommodating variations in note-taking workflows. Planned enhancements include the ability to directly edit and remove Watches via the clinical event notes in the side panel. Currently, this is only supported via the charting tools.

Referral Activity Reporting (MVP)

CMP has enhanced your ability to report on activity associated with referral sources, giving you a better idea of the business referring providers and practices sent your way. This new 'Referral Activity' report builds on the Referral Follow-Up functionality that was added back in August 2019. With that update, CMP enabled you to define referral sources in the Patient Record and then associate any subsequent appointments with the referring doctor or practice, allowing for follow-up communication. This update enables you to track the associated patients, appointments, and production for these referral sources within a selected time period.



The screenshot shows the 'Referral Activity' report in the Carestream Dental software. The report is filtered by 'All Referral Sources, All Types, All Dates'. The table displays the following data:

Source	Practice Name	# Patients	# Appts	Posted \$	Follow-Ups
Teff Jelford	East Cobb Smiles	2	2	\$566.25	2
Barry Larba	Calismiles	2	3	\$818.30	2
Hason Jugués	Smirking Dental	1	4	\$415.25	2
Mevin Koloney	Smiles 4 Miles	2	14	\$2,760.25	3

From the Location Tab, select Financial > Referral Activity. The list of referral sources with related activity (e.g., patient appointments and/or posted production) is displayed. From here, you can also create a new Referral Source to use for future patient referrals or manage the existing Referral Follow-Ups for the location. Filters are also available to refine the list, allowing you to see

activity for one or more specific referral sources, for a specific type of referral, or activity occurring within a specific time period. You can also group specific referral sources by an associated practice, so that you can see the business sent by all providers within a group practice for the reporting period.

Smiley Dental Surgery
(285) 555-9923
5150 Wooded Glen Drive

Referral Activity

Filtered by All Referral Sources, All Types, All Dates

Source	Practice Name
Teff Jelford	East Cobb Smiles

Select Referral Sources

- All Referral Sources
- Barry Larba
- Teff Jelford
- Gark Modfrey
- Mevin Koloney
- Hason Jugues
- Michael Ment

The Referral Activity list provides information on the number of patients, appointments, posted production, and follow-ups associated with each referral source. You can also click on a referral source to view additional details, such as contact information, the dates of the first and last referral, and summary statistics about the source's referral history. A list of the source's referred patients that have activity within the reporting time period is also provided. Summary statistics of all the patient's associated activity with the referral source are provided, including the original referral date and type, the number of appointments, the scheduled, posted, and total production associated with the source, and the status of the latest follow-up.

The screenshot shows the 'Referral Activity' page in the Carestream Dental Web DPMS. The page is filtered by 'All Referral Sources, All Types, All Dates'. A table lists referral activity with columns: Source, Practice Name, # Patients, # Appts, Posted \$, and Follow-Ups. The table shows entries for Teff Jelford, Barry Larba, Hason Jagues, and Mevin Kolonev. Barry Larba's entry is highlighted in blue. Below the table, a 'Referral Activity Summary' box for Barry Larba shows: First Referral On: 11/03/2019, Latest Referral On: 11/18/2019, Total Referred Patients: 2, Total Associated Appointments: 3, Total Posted Production: \$818.30. Below the summary, a table shows 'New Referrals for All Dates' with columns: Patient, # Appts, Referral Date, Type, Scheduled \$, Posted \$, Total \$, and Follow-Up. Two referrals are listed: Kenneth Smith (1 appointment, 11/03/2019, Other type, \$0.00 scheduled, \$351.30 posted, total \$351.30, completed on 03/17/2020) and Zizz Zizzerly (2 appointments, 11/18/2019, Assessment type, \$443.25 scheduled, \$467.00 posted, total \$910.25, due as of 03/17/2020).

We look forward to receiving feedback on this improved workflow support for referral management. Possible enhancements include the ability to define more types of referral sources, such as patients and other non-providers, as well as refinement of a referral source's association with a patient and his appointments.

Optimizations and Fixes

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

1. Fixed a defect in which duplicate clinical event notes would be added to the Hard Tissue Chart UI when a tooth gets reset.
2. Resolved a bug in which the incorrect values / records from the Procedure List & Fee Schedule were being used when importing values into an Insurance Plan Allowance Table.
3. Addressed a gap in the appointment completion logic in which the wrong date of service was being assigned to scheduled procedures when an appointment was completed on a day / date after the appointment was scheduled to happen.

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kmccall

CS Dental Employee



04-28-2020 05:31 PM

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[Referral Activity Reporting](#)

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