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MOD kevin_moloney

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04-06-2020 08:48 AM

CMP Weekly Release 0.0.0.4749

Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4749 | April 6th, 2020

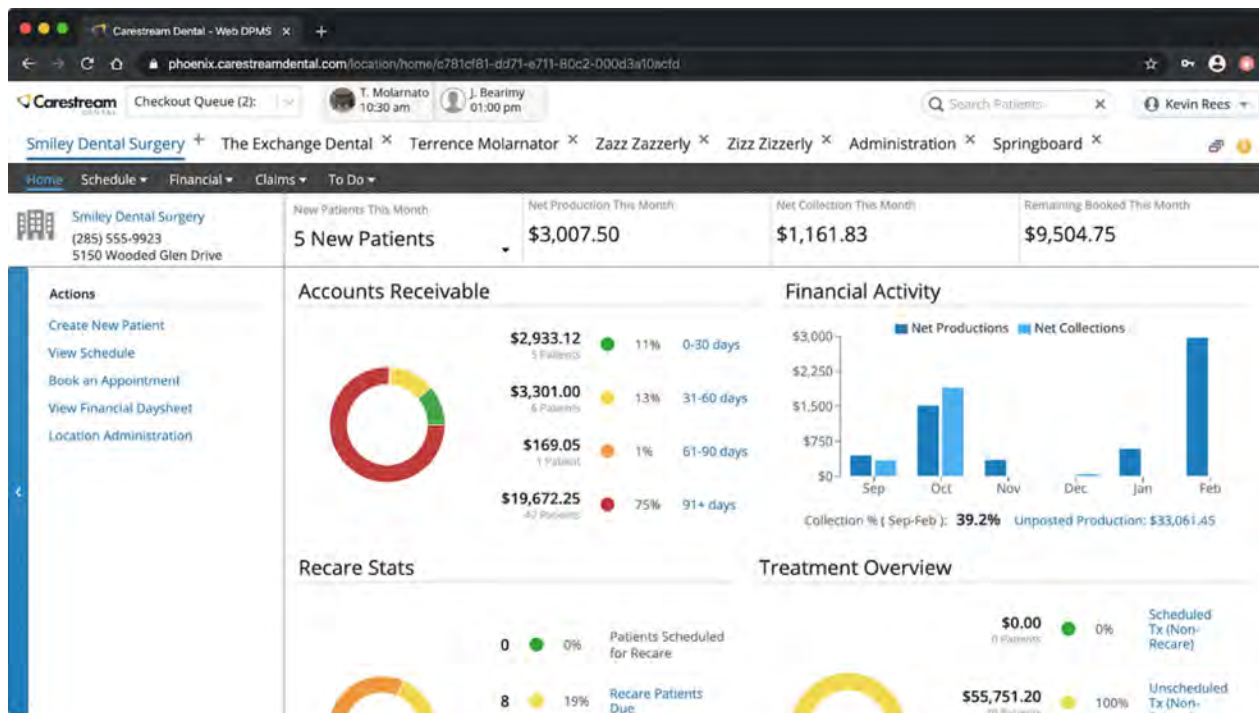
This week's CMP updates continue to expand core application functionality and deliver on recent customer requests.

Revenue Capture - Unposted Work

Another new To-Do list improves your ability to capture revenue that has yet to be realized in patient accounts. The new 'Unposted Procedures' worklist enables you to review and manage procedures that were previously completed, but not yet posted to patient ledgers. This capability already existed in CMP, but was

only available on an individual patient basis (accessible via the Patient Ledger). This new worklist UI provides access to all unposted work, for all patients, for a given location.

The 'Financial Activity' widget on the Location Homepage has been updated to provide an accounting of the location's unposted work and a navigational link to the new worklist. Alternatively, you can access the list directly from the Location Tab, selecting 'To Do' and then 'Unposted Procedures'. The list of patients with unposted work is displayed, along with some summary statistics for the location's unposted work. Filters are also available to help refine the list, allowing for filtering by patients, associated service provider, service date(s), or even related revenue value.



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

Unposted Procedures

Filtered by All Patients, All Providers, All Production Values, All Times

Patient	Procedures	Unposted Since	Total
New Patient 4	(16) D6205, D6205, D6205, D6205, D...	07/29/2019	\$2,400.00
New Patient 8	(9) D6205, D6051, D6205, D6205, D6...	07/31/2019	\$2,427.00
New Patient 1	(8) D2642, D2642, D2620, D9310, D0...	08/06/2019	\$869.25
Terrence Molarnator	(19) D2651, D2650, D3348, D0220, D...	07/22/2019	\$5,736.30
Zizz Zizzerly	(3) D0170, D9110, D0272	06/19/2019	\$300.00
New Patient 2	(9) D0120, D1110, D0272, D0140, D0...	11/07/2019	\$2,138.05
new patient new	(8) D9920, D7140, D6051, D6240, D6...	01/29/2020	\$2,216.80
Jeff Vieux	(1) D5140	03/03/2020	\$1,340.00
New Patient Test	(4) D0150, D1120, D0210, D0120	11/07/2019	\$438.95
Zazz Zazerly	(1) D0140	11/12/2019	\$100.80
Kay Hart	(3) D0120, D1110, D0272	11/20/2019	\$240.25
Peggy Petty	(4) D0120, D1110, D0274, D1330	11/20/2019	\$415.25
Ami Underwood	(3) D0272, D2712, D0140	11/20/2019	\$315.80
Lon Lamh	(1) D3348	11/20/2019	\$949.00

You can click on a patient to view additional details about the patient's unposted work associated with the location. This includes summary information about the unposted work and the patient's account balance. From here, you can review the patient's ledger or post these transactions. Clicking on 'Post Charges' will display the list of unposted work, providing workflow support for selecting and posting these new charges to the patient ledger. This can also tie into the creation of insurance claims, as applicable, to avoid adding new items to the 'Unbilled Procedures' worklist.

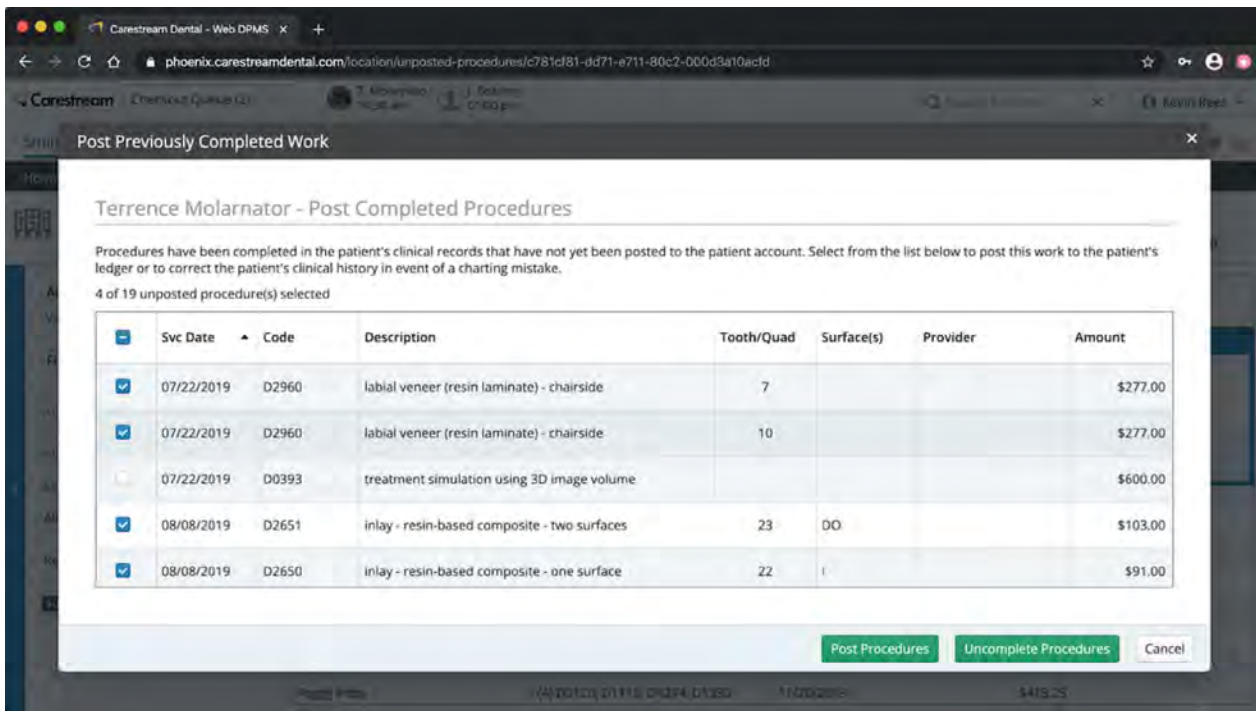
Unposted Procedures

Filtered by All Patients, All Providers, All Production Values, All Times

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Peggy Petty	(4) D0120, D1110, D0274, D1330	11/20/2019	\$415.25

Terrence Molarnator
 (916) 555-2148
 39 yrs (Self)
 19 Unposted Procedures
 from 07/22/2019 to 02/18/2020
 Last appt on 02/18/2020
 Account balance of \$3,363.30

[Post Charges](#) [View Ledger](#)



We hope that this new functionality will assist you with your revenue capture tasks. Possible enhancements include the ability to remove (uncomplete) incorrect procedure entries and add adjustments or write-offs related to these items.

Schedule DayView Enhancements

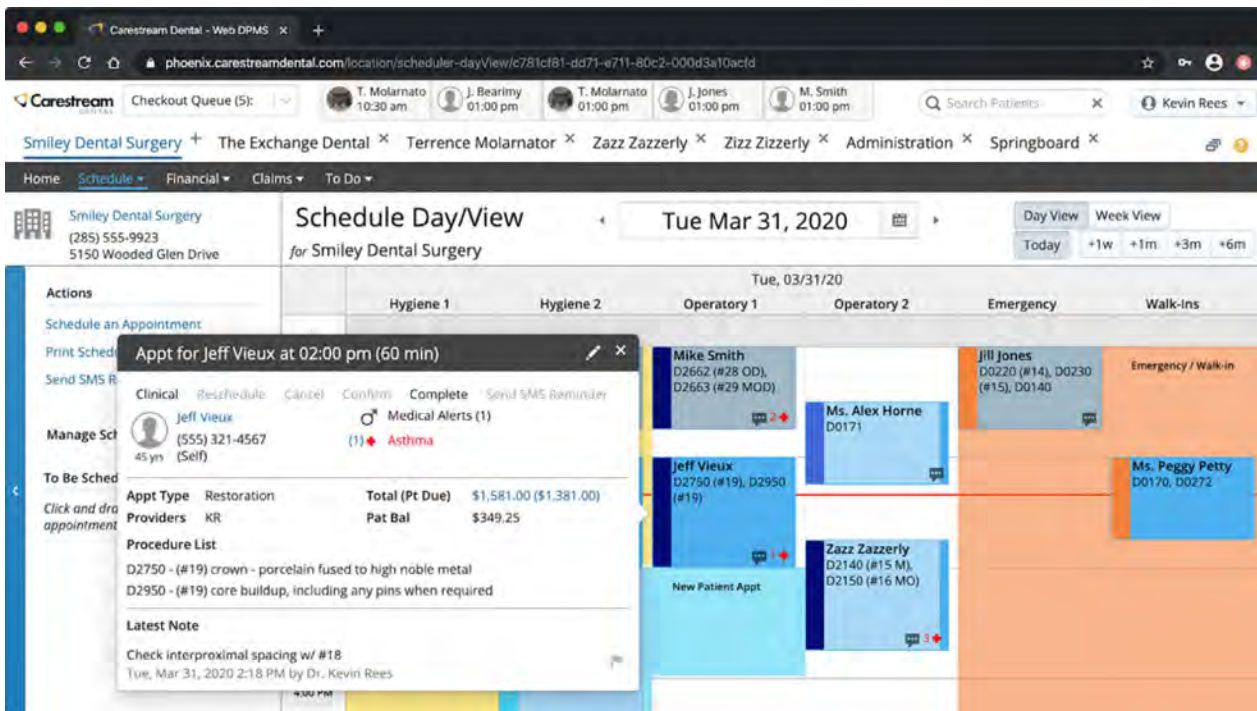
A number of enhancements have been made to the Schedule DayView, improving support for your various scheduling workflows. Popover dialogs, displayed when hovering over the Appointment Tile or its indicators (appointment notes and medical alerts), no longer obscure one another. The appointment tile itself has also been enhanced, making it easier to read at a glance. The labels displaying the patient name and the scheduled procedures (or appointment type) have been optimized, increasing the font size and implementing intelligent display behavior. Additionally, whenever scheduled procedures involve specific anatomy, such as a crown-based restoration, these anatomy details are displayed on the Appointment Tile.

Carestream Dental - Web DPMS
 phoenix.carestreamdental.com/location/scheduler-dayView/C781cf81-dd71-e711-80c2-000d3a10acfd
 Carestream Checkout Queue (5): T. Molarnato 10:30 am, J. Bearimy 01:00 pm, T. Molarnato 01:00 pm, J. Jones 01:00 pm, M. Smith 01:00 pm
 Search Patients Kevin Rees
 Smiley Dental Surgery + The Exchange Dental x Terrence Molarnator x Zazz Zazerly x Zizz Zizzerly x Administration x Springboard x
 Home Schedule Financial Claims To Do
 Smiley Dental Surgery (285) 555-9923 5150 Wooded Glen Drive
 Schedule Day/View Tue Mar 31, 2020 Day View Week View Today +1w +1m +3m +6m
 Tue, 03/31/20
 Hygiene 1 Hygiene 2 Operatory 1 Operatory 2 Emergency Walk-ins
 1:00 PM Jeremy Bearimy D0120, D1110, D0274, D1330 Terrence Molarnator Hygiene / Recall Mike Smith D2662 (#28 DD), D2663 (#29 MOD) Ms. Alex Horne D0171 Jill Jones D0220 (#14), D0230 (#15), D0140 Emergency / Walk-in
 2:00 PM Mrs. Beth Blake D0120, D1110, D0274, D1330 Jeff Vieux D2750 (#19), D2950 (#19) Ms. Peggy Petty D0170, D0272
 3:00 PM Mr. Zane Haas D0120, D1110, D0210 Mrs. Irma Love D0150, D1110, D0210 New Patient Appt Zazz Zazerly D2140 (#15 M), D2150 (#16 MO)
 4:00 PM

Some key appointment information has also been added to the popover dialog triggered when hovering over an Appointment Tile. This now includes the patient's name, appointment start time, appointment duration, initials of the allocated provider(s), text of the latest appointment notes, and any associated anatomy details - such as a tooth number and surfaces - for any scheduled procedures. This makes it easier for you to get core information for an appointment in a crowded schedule without ever having to make a single click.

Carestream Dental - Web DPMS
 phoenix.carestreamdental.com/location/scheduler-dayView/C781cf81-dd71-e711-80c2-000d3a10acfd
 Carestream Checkout Queue (5): T. Molarnato 10:30 am, J. Bearimy 01:00 pm, T. Molarnato 01:00 pm, J. Jones 01:00 pm, M. Smith 01:00 pm
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 2:00 PM Mrs. Beth Blake D0120, D1110, D0274, D1330 Jeff Vieux 02:00 pm (60 min) KR Appt Type Restoration D2750 - (#19) crown - porcelain fused to high noble metal D2950 - (#19) core buildup, including any pins when required Latest Note (+ 1 notes) Check interproximal spacing w/ #18
 3:00 PM Mr. Zane Haas D0120, D1110, D0210 Mrs. Irma Love D0150, D1110, D0210 New Patient Appt Zazz Zazerly D2140 (#15 M), D2150 (#16 MO)
 4:00 PM

Similar information has been added to the Appointment Summary popover, triggered when clicking on an Appointment Tile. The details include any associated anatomy details for scheduled procedures, the appointment start time and duration, the initials of the allocated providers, and the patient's current account balance. These additional details make it easier to view all of the key appointment information in a single click, without having to refer back to the underlying schedule dayview.



Production information is also now available via the Schedule Dayview, displaying the scheduled production value for both the day and each chair / operator. From the Administration Tab, select Scheduler > Schedule Settings to turn on the display of Schedule Production Data for a given location. You can now selectively show or hide this data in the Schedule Dayview by adjusting your schedule view (Manage Schedule View Cog > Display Schedule Production Data). When enabled, the dynamically calculated production value, based on scheduled procedures, will be displayed. These values will be automatically recalculated as new appointments are booked, existing appointments get cancelled or modified, procedure fees get adjusted, and so on.

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/administration/scheduler-dayViewSettings

Checkout Queue (5): T. Molarnato 10:30 am J. Bearimy 01:00 pm T. Molarnato 01:00 pm J. Jones 01:00 pm M. Smith 01:00 pm

Smiley Dental Surgery + The Exchange Dental x Terrence Molarnator x Zazz Zazerly x Zizz Zizzerly x Administration x Springboard x

Locations Team Members Procedures & Fees Recare Scheduler Insurance eServices Templates User Permissions Springboard Imaging

Schedule Settings

for Smiley Dental Surgery Back to Top

Actions

Edit Schedule Settings

Select Location

Active Inactive All

Search (1/22 patients)

- Glendale Dentistry (556) 555-5532 6006 W Maryland Ave
- Smiley Dental Surgery (285) 555-9923 5150 Wooded Glen Drive
- The Exchange Dental (654) 555-5454 33 The Exchange Road

Base Time Unit 5 minut

Display Schedule Production Data

Showing as Columns in Schedule View

Save Cancel

Checking this box will display calculated production value for each day and chair currently in view in the Schedule Day/View. Unchecking this box will hide this information in the Schedule Day/View for all users. Note: Users will need to individually turn on the display of the production data in the Schedule Day/View under their Schedule View Configuration settings.

Chairs

Hygiene 1	Active	Inactive
Hygiene 2	Active	Inactive
Operator 1	Active	Inactive
Operator 2	Active	Inactive
Emergency	Active	Inactive
Walk-ins	Active	Inactive
Scallower	Active	Inactive

Carestream Dental - Web DPMS

phoenix.carestreamdental.com/location/scheduler-dayView/c781cf81-d871-e711-80c2-000d3a10acfd

Checkout Queue (5): T. Molarnato 10:30 am J. Bearimy 01:00 pm T. Molarnato 01:00 pm J. Jones 01:00 pm M. Smith 01:00 pm

Smiley Dental Surgery + The Exchange Dental x Terrence Molarnator x Zazz Zazerly x Zizz Zizzerly x Administration x Springboard x

Home Schedule Financial Claims To Do

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

Schedule Day/View for Smiley Dental Surgery

Tue Mar 31, 2020

Day View Week View

Today +1w +1m +3m +6m

Tue, 03/31/20

	Operator 1	Operator 2	Emergency	Walk-ins
3:00 PM	Mr. Eric Cook D0120, D1110, D0210	Ms. Alex Horne D0171	Jill Jones D0220 (#14), D0230 (#15), D0140	Emergency / Walk-in
4:00 PM	Ms. Trina Love D0150, D1110, D0210	Jeff Vieux D2790 (#19), D2990 (#19)	Zazz Zazerly D2140 (#15 M), D2150 (#16 MO)	Ms. Peggy Petty D0170, D0272
		New Patient Appt.		

Manage Schedule View

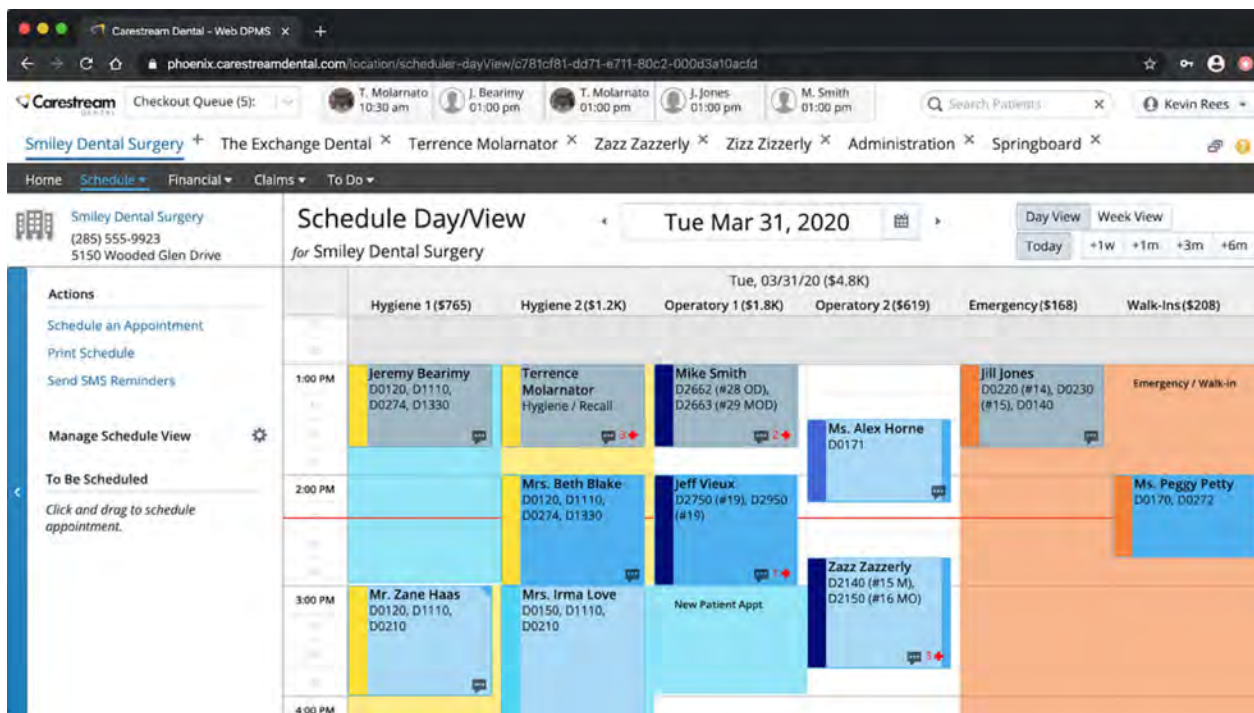
Select Chairs (6 of 6)

Highlight Appts. Unconfirmed

Color Appts. by Providers Appt. Types

Show Block Booking Guidance

Display Schedule Production Data



Lastly, it should also be noted that some of the optimizations made to the Appointment Tile display in the Schedule Dayview have also been applied to the Schedule DayView printout. The printed dayview now also includes the enhanced display of key appointment details - such as patient name and scheduled work - as well as any associated anatomy details of the scheduled procedures. The initials of the associated providers are also displayed on the printout.

We hope that these various design and usability enhancements will make your scheduling and appointment management workflows even easier.

Third Party Imaging Support - Digora

CMP is starting to expand support for the use of third party imaging tools with this update. If you use the Digora for Windows (Soredex) imaging client, CMP now supports a one-way imaging bridge integration. You can now select 'Digora' as the Imaging Software used in your location (via Administration > Imaging). From the Patient Tab (select Clinical > Images), you can now follow the standard instructions for installing the Imaging Bridge, if necessary. Clicking on 'Acquire New Image' will then open the Digora software on your computer and pass the current patient context - name and Patient ID - from CMP to Digora.

Imaging Directory: \\servername\images

Imaging Software: CSI

Select the software you want to launch from the list

- CSI
- Digora

Miles Dentistry John Smith ✕ Administration ✕

Home Patient Record Medical History Insurance ▾ Clinical ▾ Financials ▾

 John Smith
 (530) 555-1212
 53 yrs (Self) ♂
 (0) +

Images

for John Smith

Actions

- Install Imaging Bridge
- Acquire New Image

Switch View



Image Filters

Reset

Acquisition Date

All Dates


Image Type

All Modalities

File Name

Patient Card

Name: Smith, John
 ID: 0940320
 Birth date: 12/1/1981
 Gender: [Dropdown]
 Doctor: -
 Status List: [Table]
 Diagnose: [Text Area]
 Next Readout with Brightness Offset
 Show Image Information



3/31/2020 8:11 AM 3/31/2020 8:11 AM 3/31/2020 8:12 AM 3/31/2020 8:12 AM 3/31/2020 8:12 AM

Intraoral | Panoramic | Cephalometric | Tomographic | Video | General

18	17	16	15	14	13	12	11		21	22	23	24	25	26	27	28
48	47	46	45	44	43	42	41		31	32	33	34	35	36	37	38

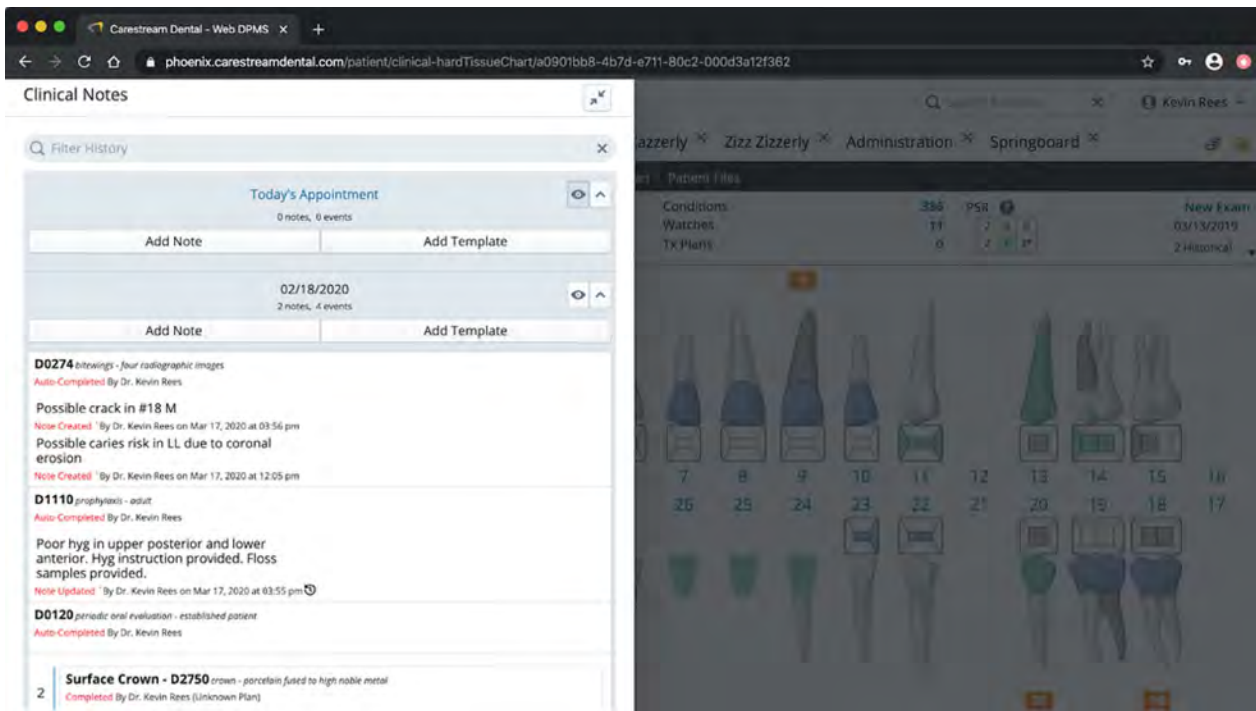
It should be noted that this is a one-way imaging bridge, with any images acquired through Digora will not be uploaded to the cloud or become accessible directly via CMP. However, the patient's name and/or Patient ID will serve as a logical connection between the two systems when reviewing images in Digora.

We hope that this new integration with the Digora imaging client will provide some flexibility for those users who are not currently using CSI as their imaging solution. Planned enhancements include support for several other popular third party imaging solutions, such as the Aptyx Imaging clients.

Expanded Clinical Event Notes Panel

You can now expand the side panel of the Hard Tissue Chart, providing more space to review and enter clinical event notes. Simply click on the new expand button to open the enlarged side panel, which overlays the chart. This enlarged notes view is also available in the patient's Treatment Plan screen as well. You can click on the contract button, or anywhere outside of the Clinical Notes pane, to return to the default view.

The screenshot displays the Carestream Dental software interface. At the top, the browser address bar shows the URL: phoenix.carestreamdental.com/patient/clinical-hardTissueChart/w0901bb8-4b7d-e711-80c2-000d3a12f362. The interface includes a navigation menu with options like Home, Patient Record, Medical History, Insurance, Clinical, Financials, Treatment Plan, and Patient Files. The main area shows a patient record for Terrence Molarnator (916) 555-2148, 39 yrs, with a gender icon and a plus sign. The patient's current mode is set to 'Current', and the region selection is 'UR' (Upper Right). The interface also displays a 'Hard Tissue Chart' with 32 numbered teeth (1-32) and their corresponding radiographic images. The expanded clinical notes panel on the left shows a list of notes for the date 02/18/2020, including a note about a possible crack in tooth #18 M and a note about possible caries risk in the lower left quadrant due to coronal erosion. The notes are created by Dr. Kevin Rees on March 17, 2020, at 12:05 pm. The interface also shows a 'New Exam' button for 03/13/2019 and a '2 Historical' indicator.



We hope that this enhancement, along with the previous improvements to the clinical event notes from last week, will help make the documentation and review of clinical care faster and easier. We are also planning to implement a search function in the clinical notes, making it faster and easier to locate specific clinical events in a patient's history.

Archive Bulk Statement Reports

Whenever you generate a set of billing statements from the Accounts Receivable UI, these .pdf-based reports are now stored in CMP and are easily accessible for future use or re-printing. From the Location Tab, select Financial > Archived Bulk Statement Reports to access this new repository of generated billing statements. Now, you never have to worry about missing the notification that your billing statements are available for download / printing, while the batch of statements is being generated. Simply visit the new 'Archived Bulk Statement Reports' list to find the .pdf file containing all of the new billing statements.

Generated On	Generated By	StatementCount	Due Date	Total Amount
Tue, Mar 31, 2020 1:32 PM	Dr. Kevin Rees	26	04/30/2020	\$4,302.75
Fri, Apr 26, 2019 1:12 PM	Dr. Kevin Rees	22		

This new list contains basic details about when (and by whom) the billing statements were generated, as well as the associated due date and the total amount being billed by the batch of statements. Clicking on the report item will download the .pdf file, so that the statements can be reviewed and/or printed. Note that any previously generated bulk billing statements - prior to this update - will also be available in this list, although the Due Date and Total Amount details will not be displayed. This new functionality should help you to better keep track of the billing statements that have been generated for patients, as well as providing the ability to easily reprint a batch of statements in case of printer malfunction or other, related issues.

General Usability Enhancements

You can now more quickly and easily create new insurance plans. With this update, the annual coverage period for an insurance plan is automatically defaulted to the calendar year (January to December) when creating a new insurance plan. Additionally, any associated anatomy details - such as tooth numbers and/or surfaces - are now displayed in the 'Description' field of the Patient Ledger, when applicable. This should help you more quickly review Patient Ledger history, without having to unnecessarily dig into the transaction details to find this information.

We are continuously looking to improve the user experience and workflow support provided by CMP. We appreciate you letting us know what works well for you and what we can improve. Additionally upcoming enhancements include:


- Hiding inactive patient records from search results by default;
- Visually distinguishing tab types (e.g., Location vs. Patient vs. Administration);
- Implementing column-based sorting in the Patient Ledger table; and
- Improving the usability and behavior of the Amount field / control.

Optimizations and Fixes

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

1. Addressed a defect in which the fee values and total displayed on pre-authorization claims were not reflecting manually modified procedure fee values.
2. Disable the “Run ePayments Report” action link in the Financial Daysheet UI for customers that are not configured for the ePayments service.
3. Resolved a UI defect in which the order of the procedure list in the procedure search is not ascending alphanumeric following an update to the CDT code base.
4. Expanded the workflow when completing procedures from a treatment plan in the absence of an associated appointment, requiring the association of a provider for the completed work.
5. Fixed a defect in which the coloration of appointment tiles by associated provider or appointment type would not correctly display under certain conditions.
6. Resolved a visual defect in the Schedule DayView UI in which some Appointment Tile widths were adjusted when a block booking template was applied to the date.
7. Fixed a defect in the Appointment Types configuration UI in which the field validation was failing when creating a new appointment type, creating an API call failure.
8. Addressed a bug in which the current context within a Location Tab was not being maintained when navigating between tabs.
9. Fixed a defect which prevented users from printing ADA claim forms for existing insurance claims.
10. Resolved a bug in the Financial Daysheet UI in which the Last Closed date was being incorrectly calculated / displayed.

- 11. Fixed a defect in which the creation date was sometimes being incorrectly assigned when creating new treatment plans.
- 12. Enhanced the UI and interaction behavior for SMS Opt Out for appointment reminders, so that the current state in the Patient Record is clearer.

 Add tags

	1 Kudo
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kmccall

CS Dental Employee



04-28-2020 05:22 PM

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[Archiving Bulk Statements](#)

[DIGORA Imaging Integration](#)

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	0 Kudos
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3625 Cumberland Blvd. Ste. 700
Atlanta, GA 30339

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