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CMP Weekly Release 0.0.0.4790

# Care Management Platform (CMP)

Weekly Release

Build 0.0.0.4790 | April 20th, 2020

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

Patient-Based Reporting

CMP now provides a custom reporting engine that delivers on one of the most requested enhancements from our users - the ability to generate 'patient lists'. The new 'Patient List' reporting engine enables you to select from a list of curated reports, such as Active Patients, or create a custom patient list of your

own. Once the report is generated to your specified criteria, you can print the report to .pdf format, export the results to .csv format, or generate email- or print-based correspondence to selected patients using the existing Correspondence Templates functionality.
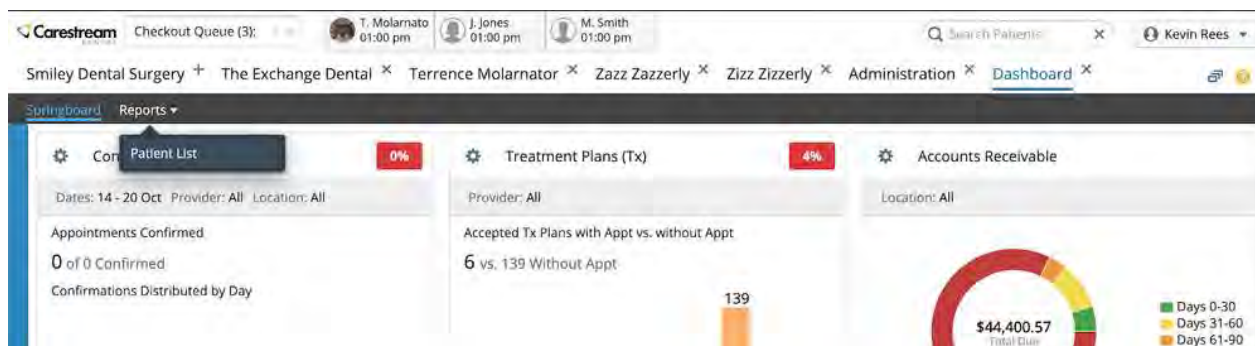

The Patient List is found under the Dashboard (User Menu > Dashboard > Reports > Patient List), alongside CMP's Springboard multi-location, graphical reporting module. The first time you access this screen, you will be prompted to create a new report or select from a library of existing reports. CMP comes pre-loaded with a small set of custom reports to get you started. You can modify these reports and/or create your own report based on your needs, such as financial, insurance, or marketing. Each report category provides a contextually-relevant set of available columns to help you generate a custom patient list.
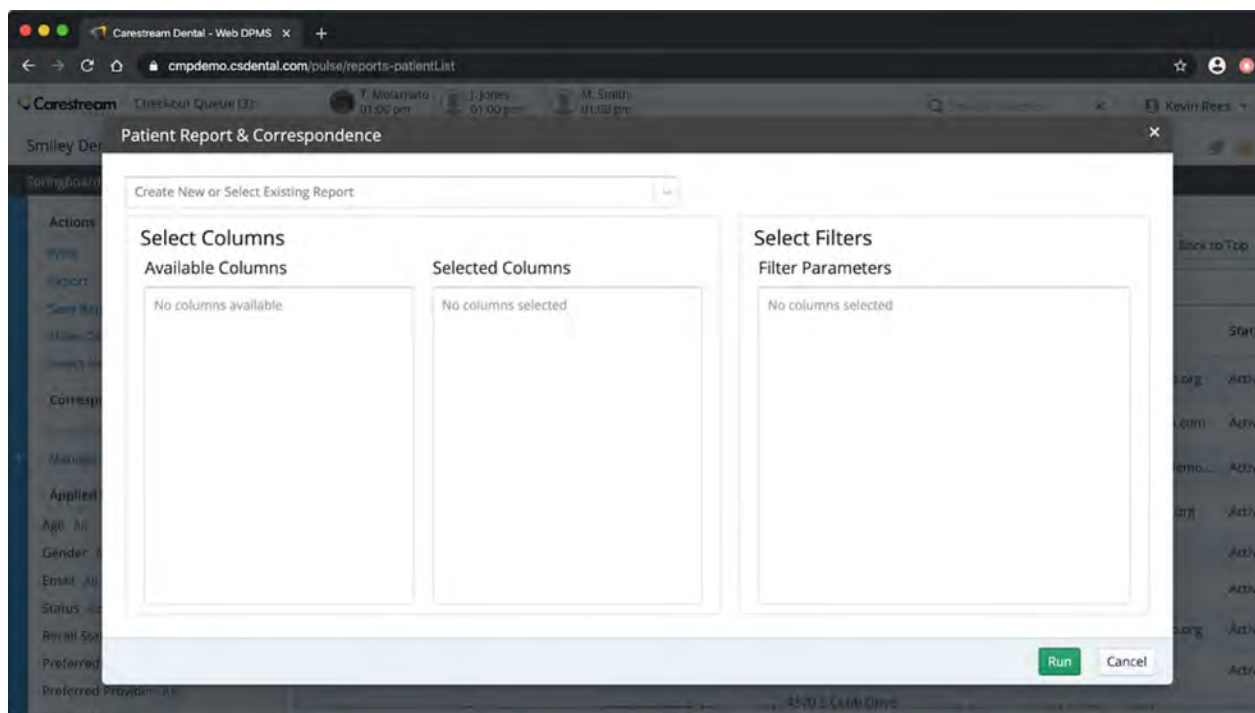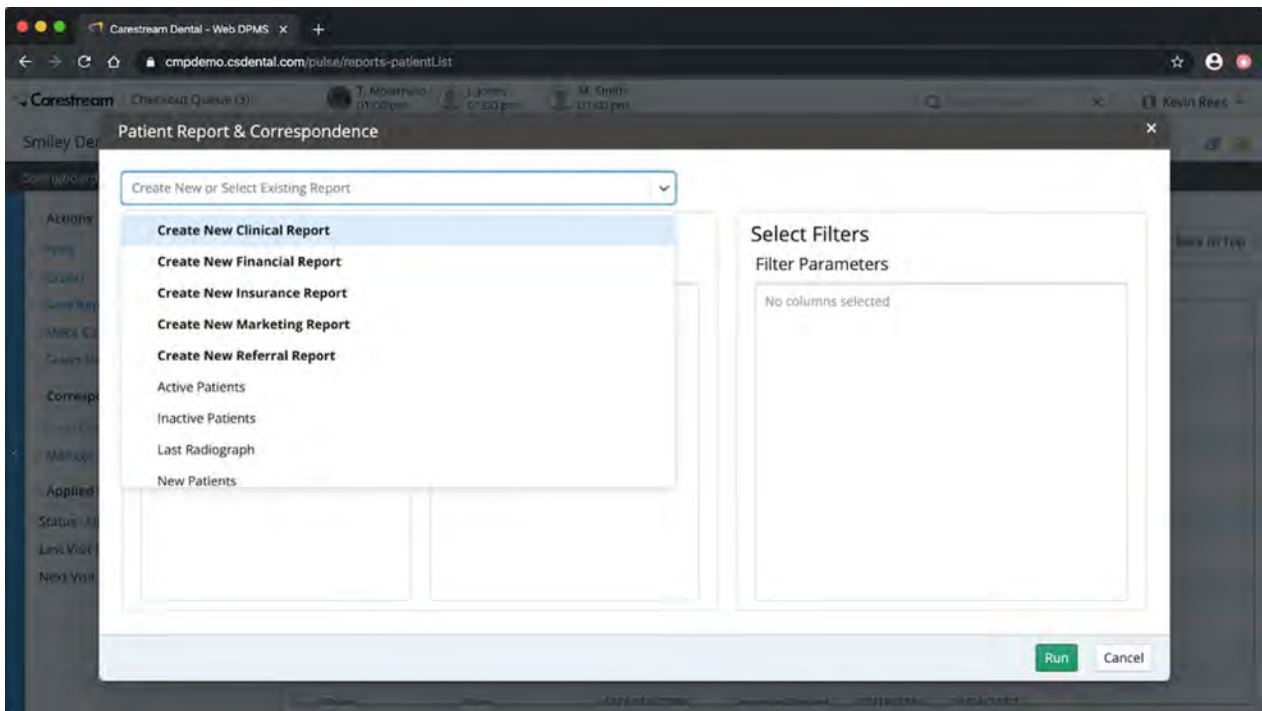
After you select an existing report or elect to create a new one, you are presented with the list of available columns (variables) to add, as well as the list currently used (if you have selected an existing report). From here, you can add, remove, or reorder the columns. Filter selections are applied to the subsequent report, but can be modified as needed. Note: Patient first and last names and primary phone numbers are included in each generated patient list by default.
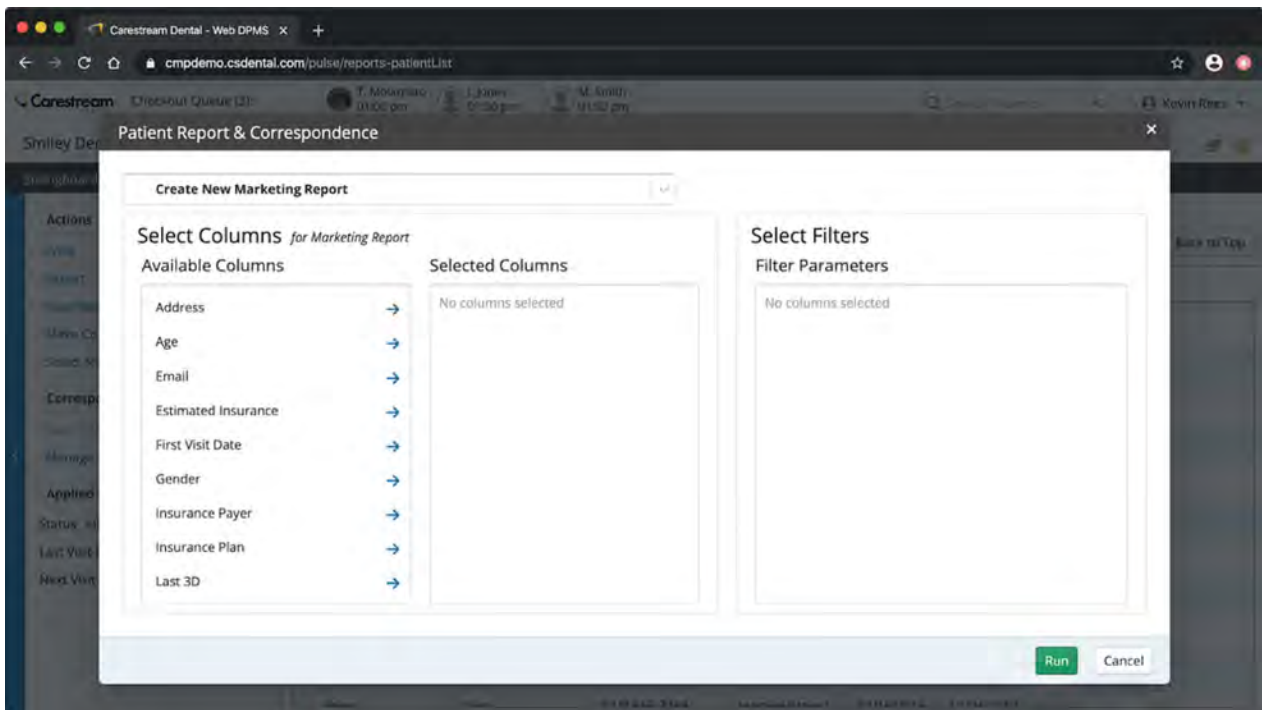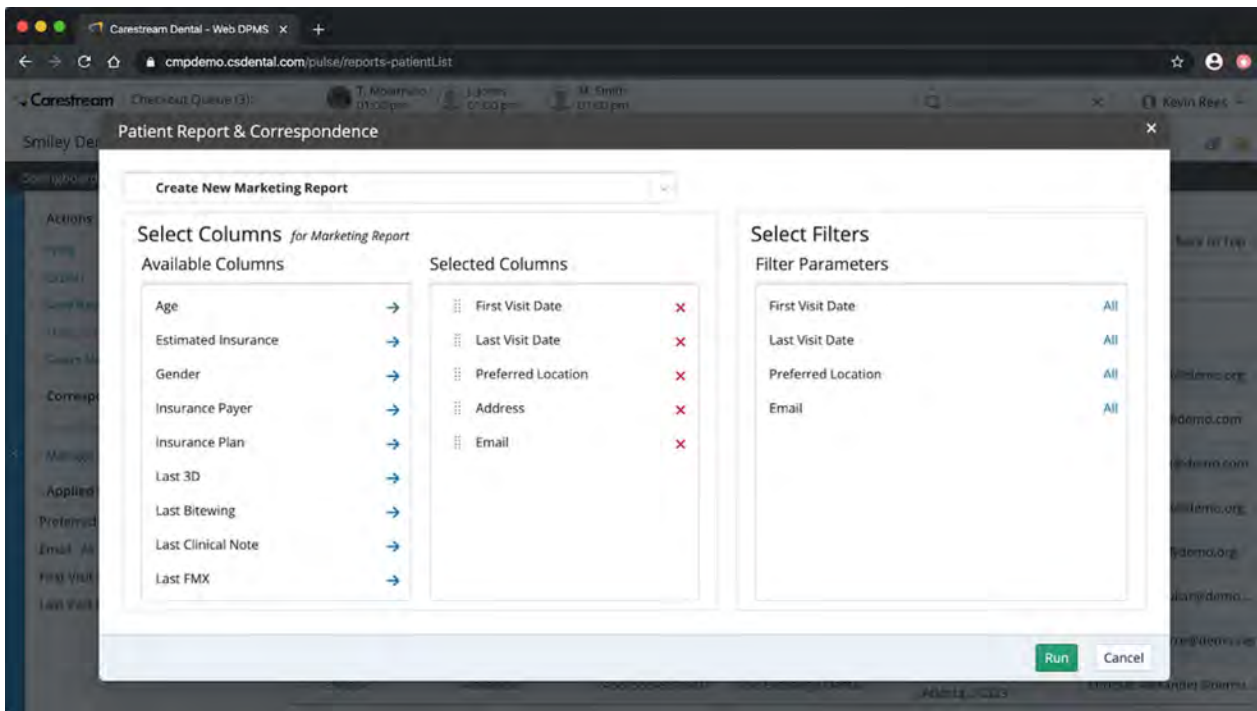
The Patient List Reporting feature enables you to save any changes made to an existing report, save a custom report for future use, or even create a copy of an existing report to provide specific variations of common reports. All reports that you and your colleagues create will be available in the list presented in the Patient Report & Correspondence dialog. Reports can also be marked as 'favorites', promoting them to the top of the list so that they are readily available to select and run again.
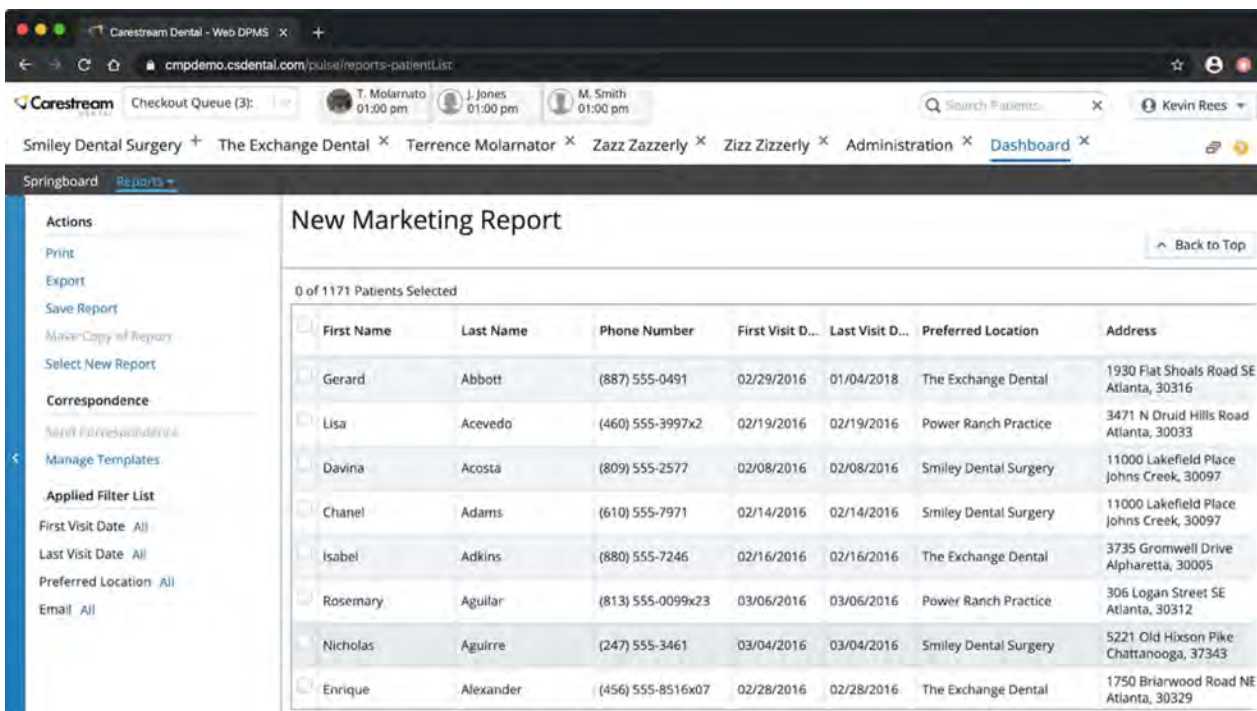
Select Filter Option - Last Visit Date

Custom

From Date

12/31/2018

Save   Cancel

Last Visit Date All
Preferred Location All
Email All

New Marketing Report

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...ents Selected

First Name	Last Name	Phone Number	First Visit D...	Last Visit D...	Preferred Location	Address
	Abbott	(887) 555-0491	02/29/2016	01/04/2018	The Exchange Dental	1930 Flat Shoals Road SE Atlanta, 30316
	Acevedo	(460) 555-3997x2	02/19/2016	02/19/2016	Power Ranch Practice	3471 N Druid Hills Road Atlanta, 30033
	Acosta	(809) 555-2577	02/08/2016	02/08/2016	Smiley Dental Surgery	11000 Lakefield Place Johns Creek, 30097
	Adams	(610) 555-7971	02/14/2016	02/14/2016	Smiley Dental Surgery	11000 Lakefield Place Johns Creek, 30097
Isabel	Adkins	(880) 555-7246	02/16/2016	02/16/2016	The Exchange Dental	3735 Gromwell Drive Alpharetta, 30005
Rosemary	Aguilar	(813) 555-0099x23	03/06/2016	03/06/2016	Power Ranch Practice	306 Logan Street SE Atlanta, 30312
Nicholas	Aguirre	(247) 555-3461	03/04/2016	03/04/2016	Smiley Dental Surgery	5221 Old Hixson Pike Chattanooga, 37343
Enrique	Alexander	(456) 555-8516x07	02/28/2016	02/28/2016	The Exchange Dental	1750 Briarwood Road NE Atlanta, 30329

Actions
Print
Export
Save Report
Make Copy of Report
Select New Report

Correspondence
Send Correspondence
Manage Templates

Applied Filter List
First Visit Date All
Last Visit Date 12/31/2018 or before
Preferred Location 1 items
Email All

New Marketing Report

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0 of 320 Patients Selected

| First Name	Last Name	Phone Number	First Visit D...	Last Visit D...	Preferred Location	Address
Davina	Acosta	(809) 555-2577	02/08/2016	02/08/2016	Smiley Dental Surgery	11000 Lakefield Place Johns Creek, 30097
Chanel	Adams	(610) 555-7971	02/14/2016	02/14/2016	Smiley Dental Surgery	11000 Lakefield Place Johns Creek, 30097
Nicholas	Aguirre	(247) 555-3461	03/04/2016	03/04/2016	Smiley Dental Surgery	5221 Old Hixson Pike Chattanooga, 37343
Brien	Allen	(610) 555-7788	02/18/2016	02/18/2016	Smiley Dental Surgery	3329 Old Milton Parkway Alpharetta, 30005
Greta	Andrews	(347) 555-6649x39	02/28/2016	02/28/2016	Smiley Dental Surgery	147 26th Street NW Atlanta, 30309
Bonnie	Anthony	(705) 555-1568x9	02/12/2016	02/12/2016	Smiley Dental Surgery	4570 S Cobb Drive Smyrna, 30082
Anissa	Arnold	(932) 555-5414	02/06/2016	02/06/2016	Smiley Dental Surgery	433 Highland Avenue NE Atlanta, 30312
Cecelia	Ashley	(815) 555-9127x424	02/15/2016	02/15/2016	Smiley Dental Surgery	10 Rimington Lane Atlanta, 30030

0 of 320 Patients Selected

Save Report   ×

New Report Name   Lapsed Patients - Smiley

Add to Favorites ⭐   OK   Cancel
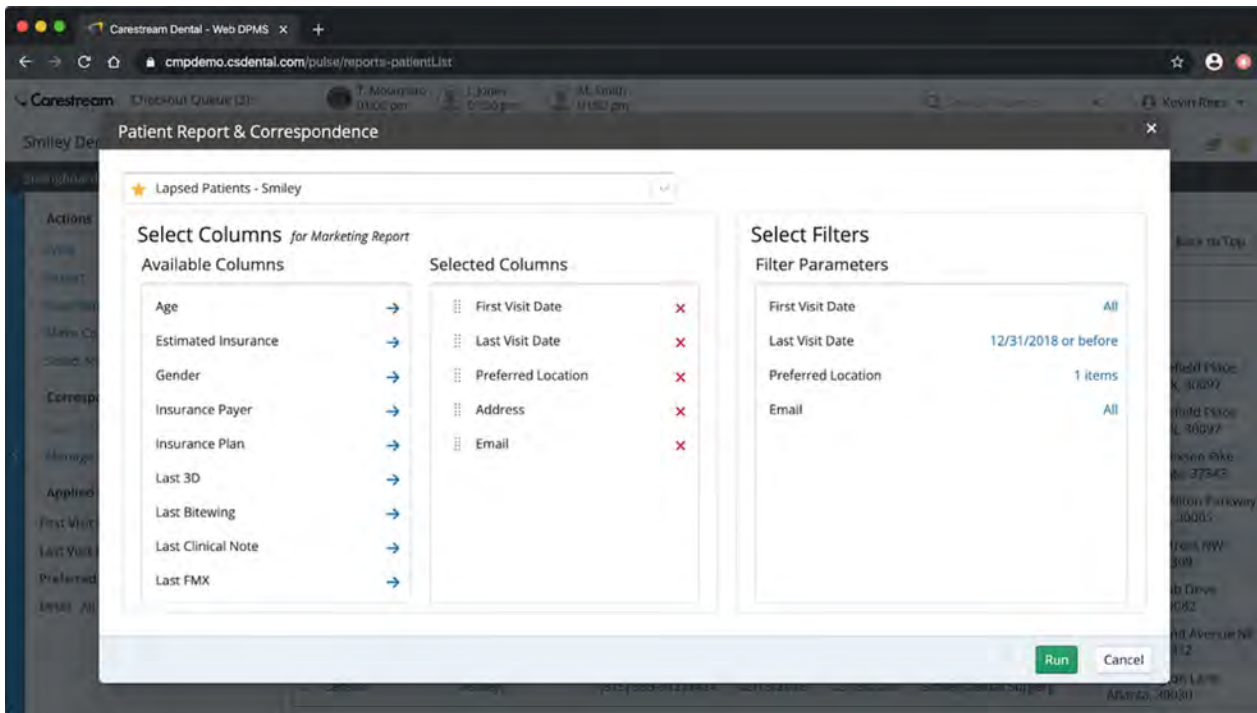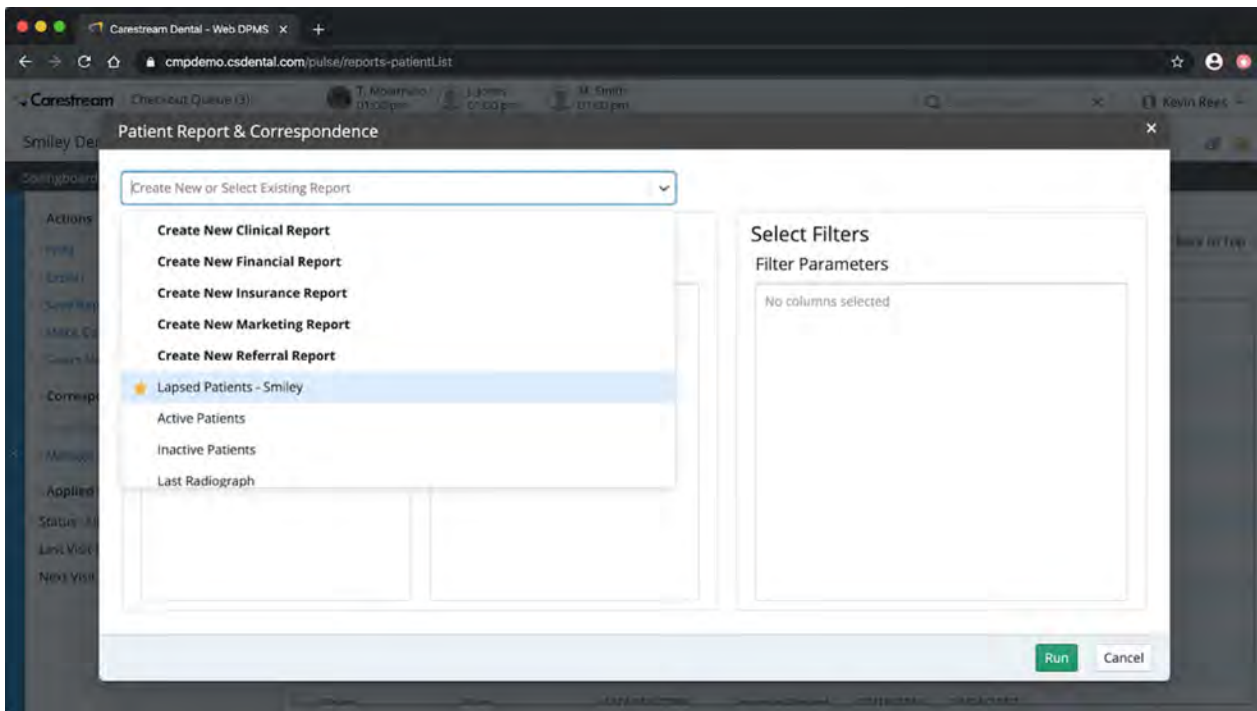
Once a report is generated, use the Actions panel to:

- Print the results to .PDF, allowing for external distribution or archiving;
- Export the list to .CSV format, making it easy to further analyse and use this data in third party applications; or
- Generate email- or print-based correspondence to selected patients, utilizing the Correspondence Templates functionality.

To generate correspondence, select one or more (or all) patients from the list, and then click 'Send Correspondence'. By default, correspondence will be generated based on each patient's preference - either generating a letter-based (.PDF) or email-based format. As with the other bulk correspondence workflows in CMP - such as Recare Reminders and Referral Follow-Ups - simply select from your existing correspondence templates to preview the communication that will be sent. You can preview each letter (or email) patient-by-patient, editing individual communications or removing them from the list. Once finished, click 'Send All' to generate a .PDF file with any letter-based correspondence, automatically send out any email-based correspondence, and keep a copy of each communication in the Patient Files list for each patient.

We are excited to provide these new capabilities and look forward to feedback on the reporting workflow support that it provides as well as what we can improve. The reporting engine has been designed in a way that allows it to quickly and easily be extended. For example, potential enhancements include

the expansion of these capabilities to support other reporting contexts, such as providers or insurance payers. The library of columns (variables) can also be expanded, allowing you to generate a larger variety of reports. Finally, additional enhancement to the Correspondence Templates functionality can provide a wider array of merge fields to use when generating batch correspondence to a selected list of entities.

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