MOD **kevin_moloney**
Moderator

05-20-2020 07:32 AM

CMP Weekly Release 0.1.4869

Care Management Platform (CMP)

Weekly Release

Build 0.1.4869 | May 20th, 2020

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

Timecard Reporting

CMP now enables you to track working hours for hourly employees to assist you with calculating payroll. A new Team Member setting has been added to specify whether an employee is hourly or salaried [Administration > Team >

Team Members]. Hourly employees are prompted to clock in and out when logged into CMP, while salaried employees are not, since their working hours are not tracked for timecard reporting.
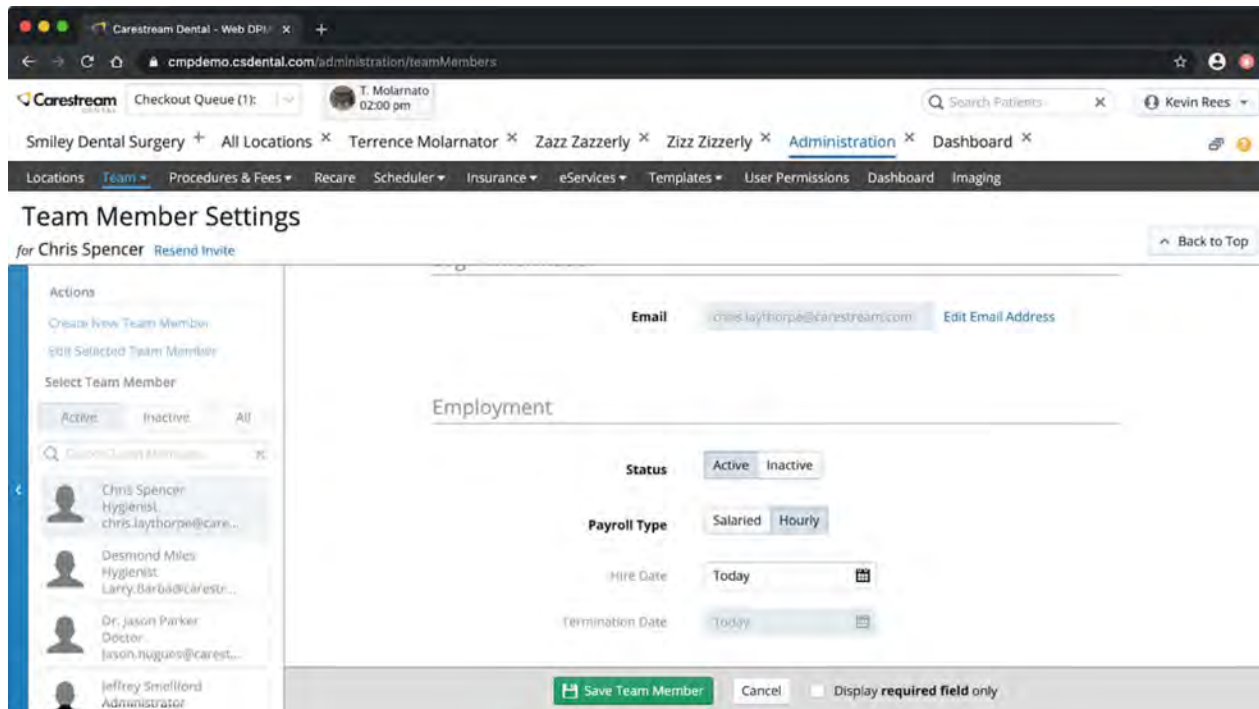
For hourly employees, a new clock in / out control is displayed next to the main User Menu. When logging into CMP, these team members will be able to clock in after logging in. To make it easy, CMP provides users the ability to automatically clock in and out when logging in and out of CMP. All clock-in and clock-out events are recorded and used to calculate working hours in the Timecard Reporting functionality.

Net Collection This Month

$0.00
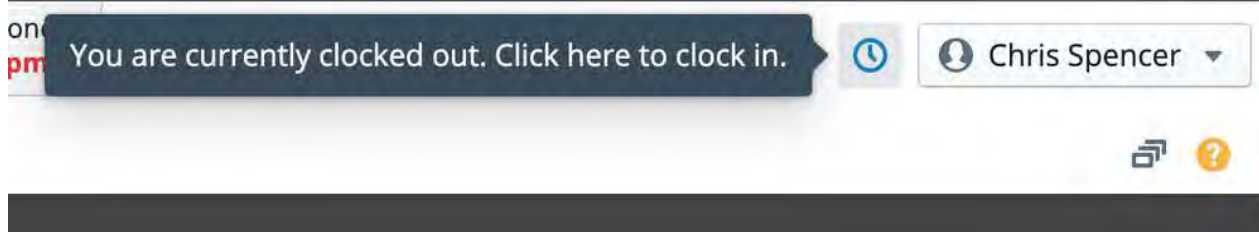
You are currently clocked out.
Last clock in on 05/14/2020 01:08 pm
Click below to clock in.

Clock In

Automatically clock in on log in

Financial Activity

$6,000 ◻ Net Productions ◻ Net Collections

The new 'Timecard Reporting' functionality enables you to review, manage, and report on working hours for applicable team members [Administration > Team > Team Timecards]. Administrators can review data on team members' calculated working hours, as well as generate timecard reports that can be printed and distributed in support of payroll activities. By default, Timecard Reporting provides working-hours data for all hourly employees for the previous two week period. You can modify the filter settings to meet your specific reporting needs. By clicking into a team member's record, additional working-hours data is presented for each day in the reporting period.

Carestream   Checkout Queue (1):   T. Molarnato 02:00 pm   🔍 Search Patients ×   ⊖ Kevin Rees ▾

Smiley Dental Surgery + All Locations × Terrence Molarnator × Zazz Zazzerly × Zizz Zizzerly × New Patient 8 × Administration × Dashboard ×

Locations Team ▾ Procedures & Fees ▾ Recare Scheduler ▾ Insurance ▾ eServices ▾ Templates ▾ User Permissions Dashboard Imaging

Timecard Reporting
for Chris Spencer John MacTavish Mr. Mark Poole , This Week (05/11/2020 - Today)   ⌃ Back to Top

Actions

Print Timecard

Filter List   Reset

Team Members 3 Team Members

Reporting Period This Week

Clock in/out issues:
  Yes   No   All

Overrides
  Yes   No   All

Team Member ▾	Active Days	Sessions	Avg. Session	Calculated Hrs	Overrides	Working Hours
Chris Spencer	5 of 5	9	3 hrs 45 mins	33 hrs 53 mins	No overrides entered	33 hrs 53 mins
Mark Poole	4 of 5	—	---	-- ⚠	No overrides entered	---
John MacTavish	5 of 5	5	8 hrs 40 mins	43 hrs 24 mins ⚠	No overrides entered	43 hrs 24 mins

Timecard Reporting
for Chris Spencer John MacTavish Mr. Mark Poole , This Week (05/11/2020 - Today)   ⌃ Back to Top

Actions

Print Timecard

Filter List   Reset

Team Members 3 Team Members

Reporting Period This Week

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  Yes   No   All

Overrides
  Yes   No   All

Team Member ▾	Active Days	Sessions	Avg. Session	Calculated Hrs	Overrides	Working Hours
Chris Spencer	5 of 5	9	3 hrs 45 mins	33 hrs 53 mins	No overrides entered	33 hrs 53 mins

Day/Date ▲	First Clock In	Last Clock Out	Sessions	Calculated Hrs	Overrides	Working Hours
Mon, 11 May 20	9:11 AM	4:11 PM	1	7 hrs	Add	7 hrs
Tue, 12 May 20	9:11 AM	4:11 PM	1	7 hrs	Add	7 hrs
Wed, 13 May 20	8:11 AM	4:11 PM	1	8 hrs	Add	8 hrs
Thu, 14 May 20	9:53 AM	3:12 PM	4	7 hrs 7 mins	Add	7 hrs 7 mins
Fri, 15 May 20	10:36 AM	4:01 PM	2	4 hrs 46 mins	Add	4 hrs 46 mins

View Detail

Mark Poole	4 of 5	—	—	-- ⚠	4 days (+ 30 hrs 30 mins)	30 hrs 30 mins

Whenever an hourly employee forgets to clock in or out, an exception is automatically flagged in the timecard reporting. This can happen when a user has logged into CMP and has been working, but forgot to clock in. Another exception can occur if the user has forgotten to clock out and the system has automatically clocked him out at midnight. Administrators can review these exceptions and file any needed overrides to correct mistakes in a team member's working hours. Exceptions and manually entered overrides are both

highlighted to make it easy for administrators to review any reporting aberrations prior to finalizing payroll. CMP provides a detailed accounting for each Team Member's clock in and out events that are used to calculate working hours.

Team Member	Active Days	Sessions	Avg. Session	Calculated Hrs	Overrides	Working Hours
Chris Spencer	5 of 5	9	3 hrs 45 mins	33 hrs 53 mins	No overrides entered	33 hrs 53 mins
Mark Poole	4 of 5	---	---	--- ⚠	No overrides entered	---
John MacTavish	5 of 5	5	8 hrs 40	4 days - No clock in, but login activity. 0 days - No clock out, (auto clock out at end of day). ed	43 hrs 24 mins

Timecard Reporting

for Chris Spencer John MacTavish Mr. Mark Poole , This Week (05/11/2020 - Today)

Team Member	Active Days	Sessions	Avg. Session	Calculated Hrs	Overrides	Working Hours
Mark Poole	4 of 5	—	—	— ⚠	No overrides entered	—

Day/Date	First Clock In	Last Clock Out	Sessions	Calculated Hrs	Overrides	Working Hours
Mon, 11 May 20	N/A	Never clocked in BUT did log in during the day. ⚠			Add	—
Tue, 12 May 20	N/A	N/A	—	— ⚠	Add	—
Wed, 13 May 20	N/A	N/A	—	— ⚠	Add	—
Thu, 14 May 20	N/A	N/A	—	— ⚠	Add	—
Fri, 15 May 20	N/A	N/A	—	---	Add	—

John MacTavish	5 of 5	5	8 hrs 40 mins	43 hrs 24 mins ⚠	No overrides entered	43 hrs 24 mins

Add Timecard Override

Enter Override hours and/or minutes to fix the team member's calculated hours.

Note: Time entered will adjust the calculated working hours, not specify the new value of working hours.

Override

+ 7 hrs 30 mins

Notes

Forgot to clock in...

Submit   Cancel

Finally, administrators can print the timecard reports for employee records. You can filter timecard reporting by a particular team member or reporting period (defaults = all team members for the previous two weeks). A detailed team member breakdown of working hours is provided for the reporting period. Each employee's report is generated in a separate section, enabling easy distribution to team members.

We are excited to provide this much-requested functionality to our CMP customers. For practices with both hourly and salaried employees, we believe the new workflow is both flexible and efficient in the recording, calculation, and reporting of employee working hours. We look forward to your feedback.

Provider Production Reporting

CMP now provides production reporting by provider, detailing each provider's charges, charge adjustments, discounts, and write-offs for the reporting period. The new Production by Provider functionality enables you to review and report on provider-based production data for a selected time period [Location Tab > Financial > Provider Production].

Production reporting has been further enhanced by the ability to assign a producer when posting adjustments, such as discounts and write-offs. When posting a new discount or write-off to the patient's account, select a provider to associate with the adjustment (Patient Tab > Financials > Ledger > Adjust Balance). Once posted, the transaction details include the provider and are considered in the calculation of a provider's net production.
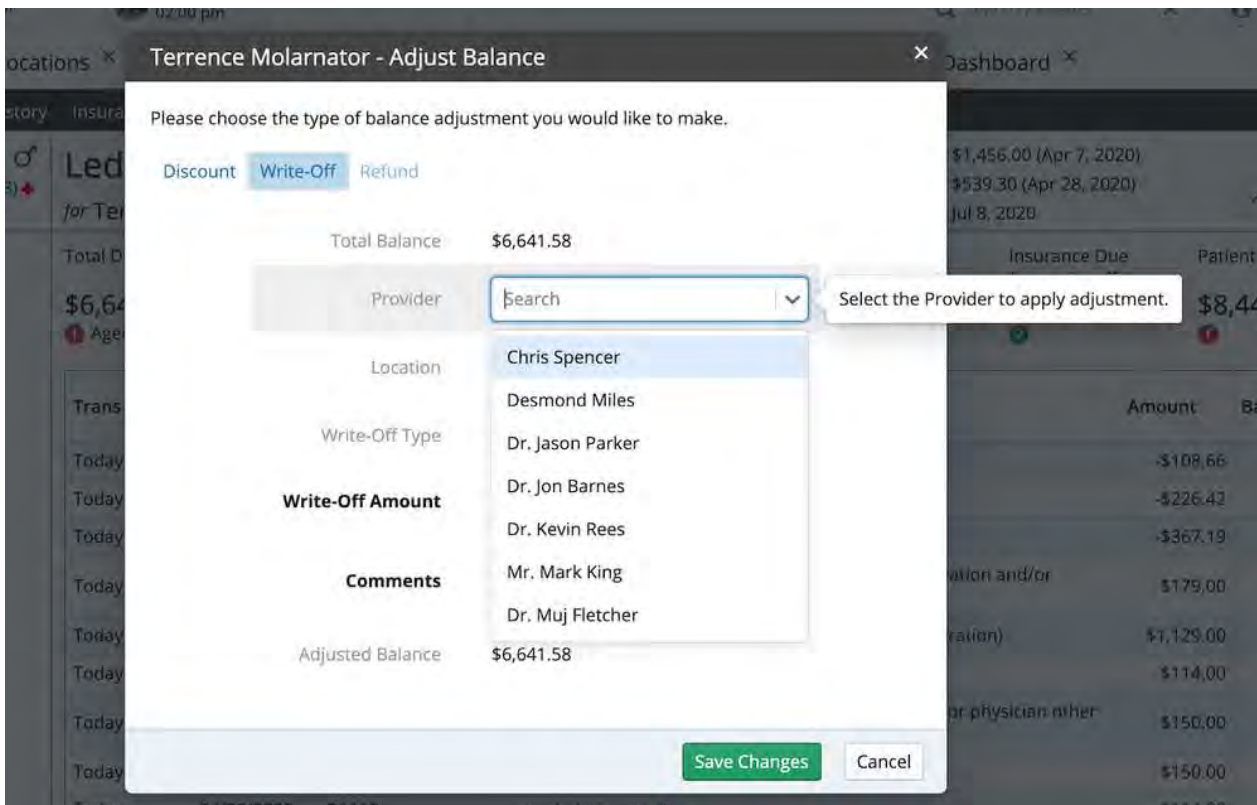
The Production by Provider functionality generates both a metrics-based production summary and a provider-based accounting of production details by transaction type. The summary includes the number of appointments completed and procedures, as well as summary statistics on production data during the selected reporting period. This includes a calculation of provider net production based on the charges, charges adjustments, discounts, and write-offs posted during the period. Total payments and refunds posted during the reporting period are also provided for reference, although more meaningful reporting on provider-based collections will be forthcoming in future releases.

As mentioned, a provider-based accounting of production-related transactions includes each provider's net production along with a series of detailed tables of the associated transactions posted during the reporting period. You can also print or export the provider production data in view. The printed production report includes a summary of each provider's production for the reporting period, while a detailed accounting for each provider is provided in a separate section so that it can be easily distributed.

Smiley Dental Surgery

Kevin Rees   5/14/2020 1:04 PM

Provider Production - Smiley Dental Surgery

Current View: Jason Parker, Jon Barnes, Kevin Rees, Muj Fletcher, 4/1/2020 - 7/1/2020

Jason Parker   Net Production: $530.09

Current View: Jason Parker, Jon Barnes, Kevin Rees, Muj Fletcher, 4/1/2020 - 7/1/2020

Charges (8)   Total: **$1,066.50**

Patient Name	Svc. Date	Code	Description	Amount
Zazz Zazzerly	4/29/2020	D2140	amalgam - one surface, primary or permanent	$172.00
Zazz Zazzerly	4/29/2020	D2150	amalgam - two surfaces, primary or permanent	$297.00
Yvonne Peck	4/29/2020	D0120	periodic oral evaluation - established patient	$68.25
Yvonne Peck	4/29/2020	D1110	prophylaxis - adult	$114.00
Yvonne Peck	4/29/2020	D0274	bitewings - four radiographic images	$83.00
Yvonne Peck	4/29/2020	D1330	oral hygiene instructions	$150.00
Orlando Fisher	4/29/2020	D0120	periodic oral evaluation - established patient	$68.25
Orlando Fisher	4/29/2020	D1110	prophylaxis - adult	$114.00

Write-Offs (2)   Total: **-$536.41**

| Patient Name	Svc. Date	Code	Description	Amount
Zazz Zazzerly	5/14/2020	Write-Off	WRITE-OFF: Contracted Insurance	-$412.85
Yvonne Peck	5/14/2020	Write-Off	WRITE-OFF: Contracted Insurance	-$123.56

We hope this new reporting functionality helps you to better monitor and use provider production data. We look forward to your feedback on what works well for you and what we can continue to improve. As mentioned, significant enhancement to payment (credit) distribution functionality and collections-based reporting will be coming in the next several updates.

Optimizations and Fixes

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

1. Ensured that all customer tenants were updated with the latest CDT code base.
2. Addressed an issue in which the Place of Treatment field in the ADA claim form was not being correctly assigned when the claimed work includes a CDT teledentistry code (D9995 or D9996).
3. Fixed a UI defect in which a non-applicable appointment status was being displayed in the filter settings of the Pending List UI.
4. Resolved an issue in which previously entered clinical event notes that were subsequently edited were not displaying the updated note text in some cases.

✏ Add tags
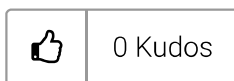
👍 0 Kudos

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