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**MOD kevin\_moloney**

Moderator



07-16-2020 09:14 AM

CMP Weekly Release 0.1.5079

# Care Management Platform (CMP)

Weekly Release

Build 0.1.5079 | July 16th, 2020

This week's Care Management Platform (CMP) updates continue to expand core application functionality and deliver on recent customer requests.

## Teledentistry Appointments [BETA]

NOTE: This feature is limited to Beta customers. If you are interested in finding out more about this new functionality, please contact:

[jonathan.barton@csdental.com](mailto:jonathan.barton@csdental.com).

CMP now integrates with Microsoft Teams™, enabling you to conduct live, teledentistry consults from your schedule. If your practice is already using Microsoft 365™ accounts as a business tool, then enrolling in Carestream Dental's teledentistry solution provides a simple way to deliver teledentistry services. Once configured, you can begin creating online meetings as part of the appointment booking process.

When creating an appointment, click the new 'Teledentistry' checkbox in the Appointment Card to designate the appointment as a teledentistry encounter. After you define the appointment details and schedule the Teledentistry appointment, you will be prompted to log into or confirm your Office 365™ account. Once access is verified, an online meeting is created, and an email invitation with the relevant appointment details is sent to the patient.

Appointment for Zazz Zazzery on Mon, Jul 13, 2020 1:45 PM at Smiley Dental Surgery

**Zazz Zazzery**  
(555) 555-5555  
17y3m Terrence Molarnator (Parent)

Medical Alerts (3)  
(3) Zazziness  
Zazzitis

Search to add procedures

Code	Description	Tooth/Quad	Surface(s)	Amount	
D9995	teledentistry - synchronous; real-time encounter			\$20.00	X
D0190	screening of a patient			\$150.00	X
Total				\$0.00	

Total Due (Pt Due) \$170.00 (\$20.00)

Add Note Audit Log Reminders

View Patient Screening Data

Appointment Info

Status: Scheduled | Checked in | Seated | Completed | Cancelled

Teledentistry

Location: Smiley Dental Surgery

Appt Type: Consult 45 mins

Confirmed: Yes No

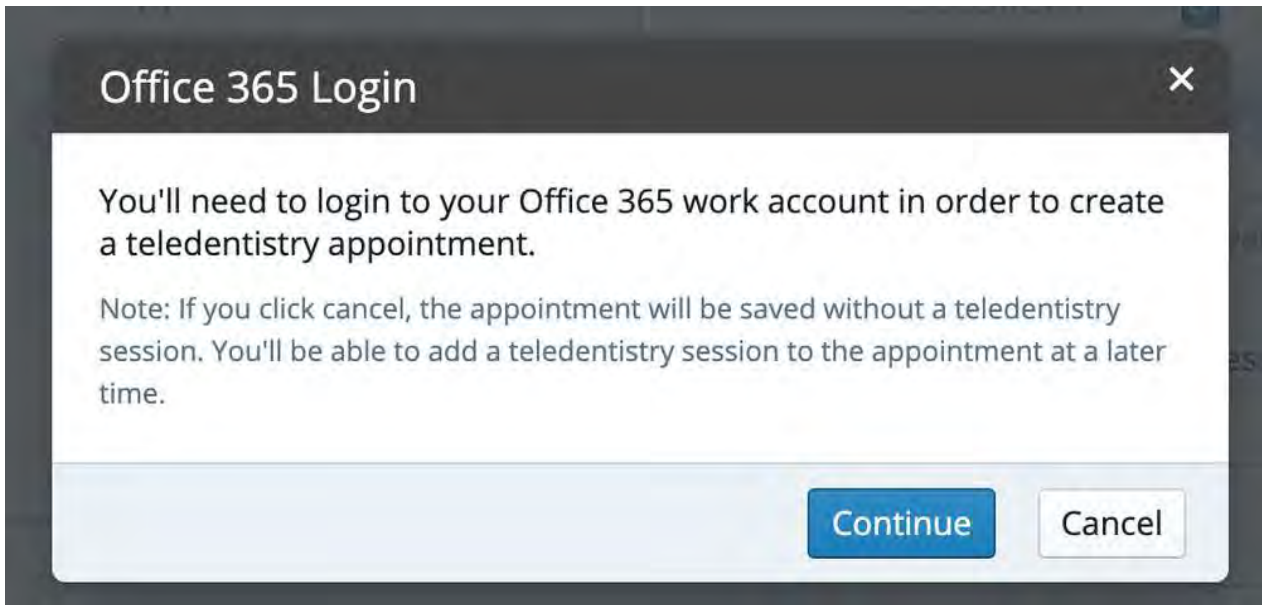
Duration: 45 Minutes

Doctor: Dr. Kevin Rees

Hygienist: Search

Assistant: Search

Screen Patient Schedule Appointment Cancel



Appointments that have associated online meetings are clearly marked on the Schedule DayView with special visual indicators. When it is time for the appointment, use your audio/visual device and click on the 'Start Online Meeting' link in the Appointment Tile popover or Appointment Card. The meeting is launched automatically, and you are ready to consult with your patient. NOTE: If the Microsoft Teams™ application is not installed on your device, use the browser-based version of Teams™ to conduct the meeting. Your patient does not have to own a Microsoft 365™ user license to join the meeting. By clicking the link in the email that was sent when the appointment was booked, your patient automatically joins the meeting as a guest. You will be notified that your patient is waiting in the virtual lobby and can admit him to start the consultation.

**Appt Location** Smiley Dental Surgery

Zazz Zazerly 01:45 pm (45 min) KR

Teledentistry appointment

**Appt Type** Consult

D9995 - teledentistry - synchronous; real-time encounter

D0190 - screening of a patient

Zazz 01:45 pm

D9995, D0190

02:30 pm

3 +

## Schedule Day/View

Mon Jul 13, 2020

Day View Week View

for Smiley Dental Surgery

Appt for Zazz Zazerly at 01:45 pm (45 min) at Smiley D...

Clinical Reschedule Cancel Confirm Check In Screen Patient Send SMS Reminder

**Zazz Zazerly**  
(555) 555-5555  
17y3m Terrence Molarnator (Parent)

Medical Alerts (3)  
(3) Zazziness  
Zazzitis

View Patient Screening Data

Start Online Meeting

**Location** Smiley Dental Surgery  
**Time** Jul 13, 2020 (45 mins)  
**Appt Type:** Consult

**Chair** Walk-Ins  
**Providers** KR  
**Total (Pt Due):** \$170.00 (\$20.00)  
**Pat Bal:** \$1,260.20

**Procedure List**  
D9995 - teledentistry - synchronous; real-time encounter  
D0190 - screening of a patient

**Latest Note**  
Teledentistry -  
Online meeting created  
Mon, Jul 13, 2020 11:54 AM by Dr. Kevin Rees

Hygiene 1  
12:00 PM

1:00 PM **Dr. Tabatha Roberson**  
D0150, D1110, D0210

2:00 PM **Miss Branden Hahn**  
D0150, D1110, D0210

3:00 PM **Dr. Orlando Wilkinson**  
D0120, D1110, D0274

Walk-Ins  
Emergency / Walk-in  
Zazz Zazerly  
D9995, D0190

Appointment for Zazz Zazerly on Mon, Jul 13, 2020 1:45 PM at Smiley Dental Surgery in Walk-Ins

**Zazz Zazerly**  
(555) 555-5555  
17y3m Terrence Molarnator (Parent)

Medical Alerts (3)  
(3) Zazziness  
Zazzitis

Search to add procedures

Code	Description	Tooth/Quad	Surface(s)	Amount
D9995	teledentistry - synchronous; real-time encounter			\$20.00
D0190	screening of a patient			\$150.00

**Appointment Info**

Status: Scheduled | Checked In | Seated | Completed | Cancelled

Teledentistry:  Start Online Meeting

**Location** Smiley Dental Surgery

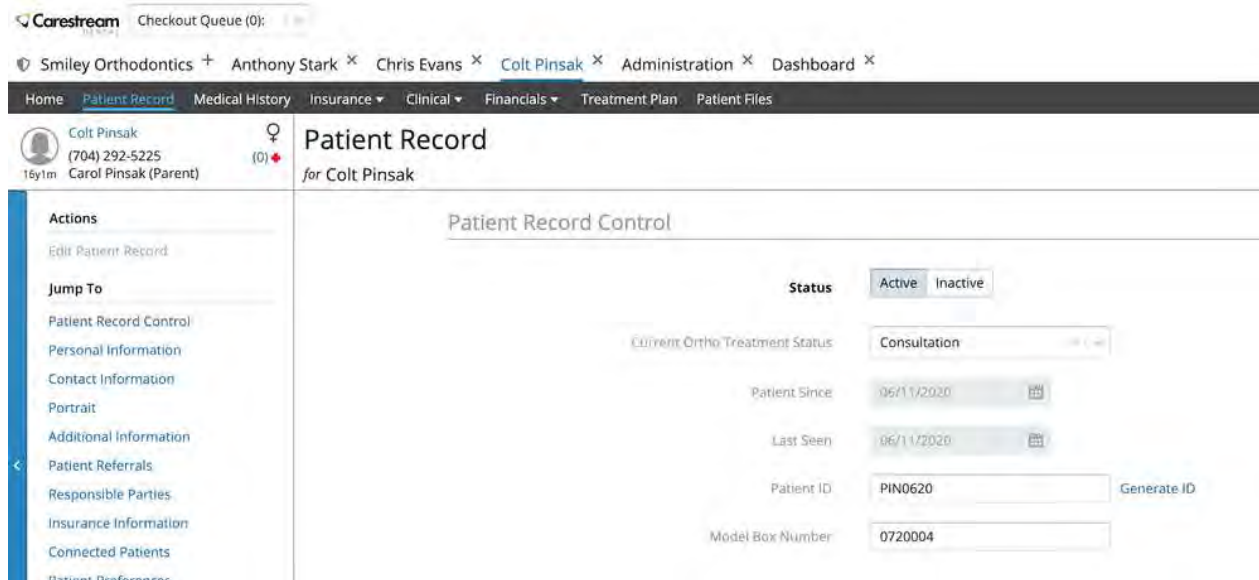
**Appt Type** Consult 45 mins

This integration provides CMP practices with the necessary tools for delivering care to patients requiring remote consultations. We are excited to provide this new capability and look forward to feedback on how it supports your teledentistry workflows.

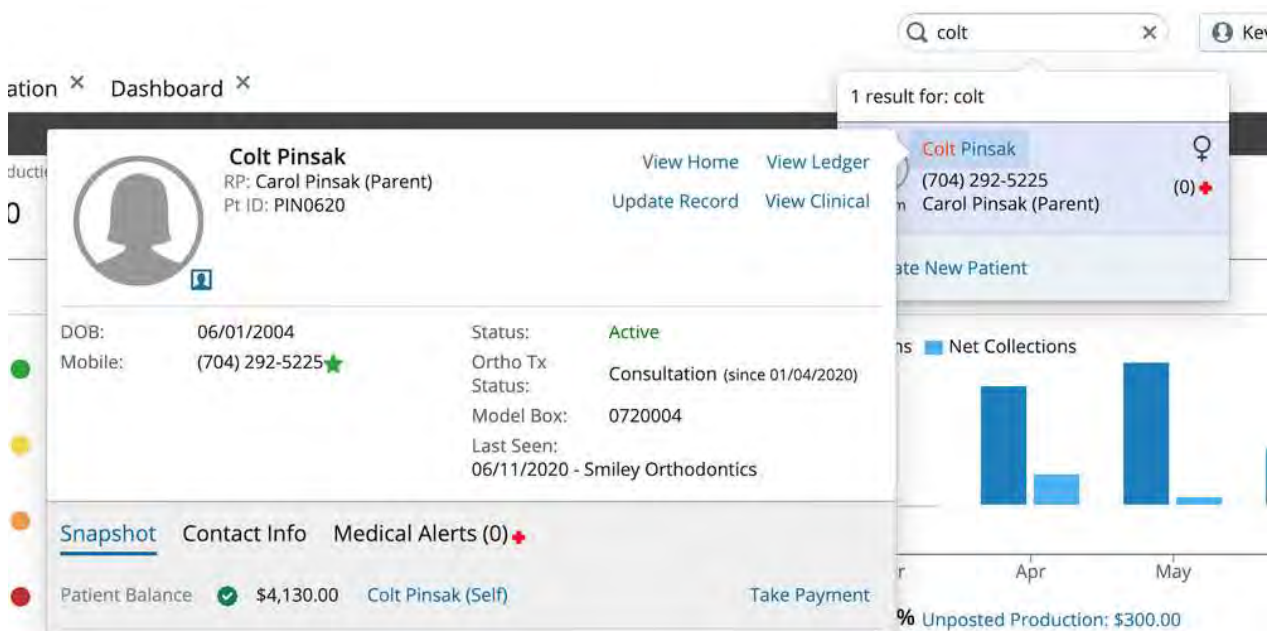
## Patient Model Box Number

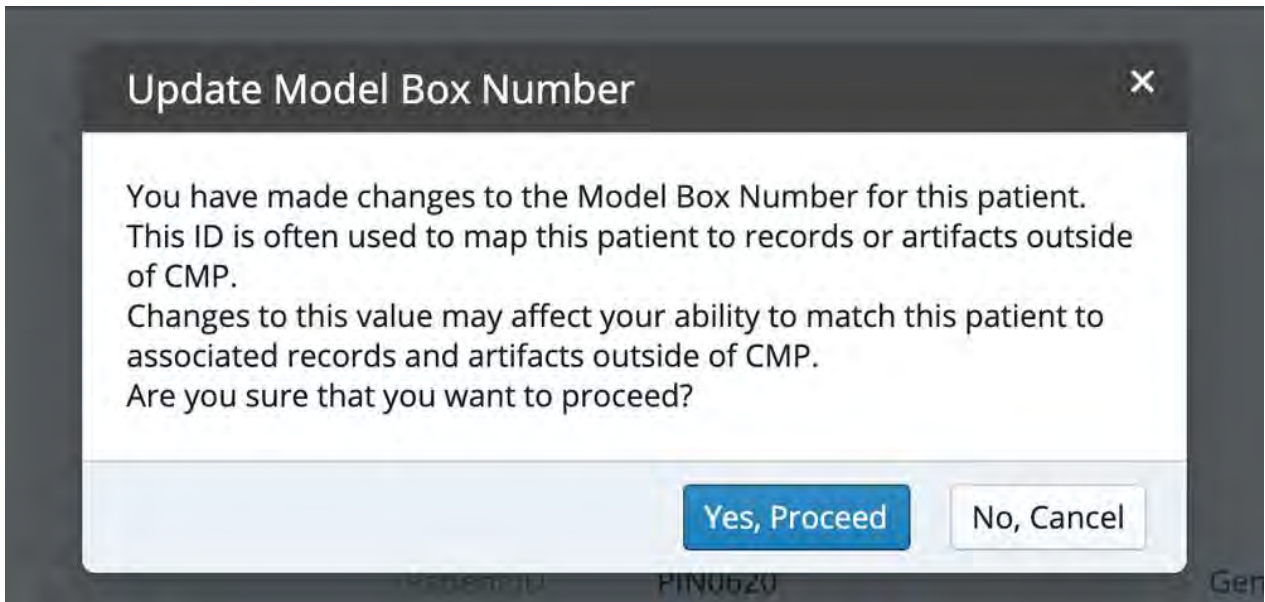


In response to requests from our orthodontic customers, the Patient Record now includes a 'Model Box Number' field. This enables you to easily link patient records in CMP to physical casts and model boxes maintained in your practice.



Once defined, the patient's Model Box Number is accessible from the Patient Record and Patient Homepage, or from anywhere via the Patient Snapshot. You are free to change or remove the patient's Model Box Number, but will be prompted to confirm this decision when saving these changes.





You can also use the Model Box Number to search for patients in CMP, making it easy to match a poorly-labeled model box to its owner. It is also a variable in the Patient List reporting, enabling you to generate lists of all patients with (or without) associated model boxes.

0620

Kevin

6 results for: 0620

20 yrs Joe doe (Parent) (0) +

Model Box: 0620001

Caroline Thomas (678) 773-2776 11y1m Melanie Thomas (Parent) (0) +

Model Box: 0620006

Bruce McCoy (404) 368-8563

Create New Patient

Patient Report & Correspondence

Create New Clinical Report

Select Columns *for Clinical Report*

Available Columns	Selected Columns
Address	Age
Estimated Insurance	Ortho Tx Status Name
First Visit Date	Model Box Number
Gender	Next Visit Date
Insurance Payer	Total Balance
Insurance Plan	Last Clinical Note
Last 3D	
Last Bitewing	
Last FMX	
Last Pan/Ceph	
Last Perio Exam	

Select Filters

Filter Parameters

Age	All
Ortho Tx Status Name	All
Model Box Number	All
Next Visit Date	Next 7 Days
Total Balance	All
Last Clinical Note	All

Run Cancel

We are happy to provide these requested enhancements to our orthodontic customers. We look forward to your feedback on what works well and what can be done to improve support for orthodontic workflows.

## Current [Orthodontic] Treatment Status

An 'Orthodontic Treatment Status' field has also been added to the Patient Record, based on feedback from our orthodontic customers. This enables your practice to better categorize and report on patients, based on their current treatment status.

Carestream Checkout Queue (0):

Smiley Orthodontics + Anthony Stark × Chris Evans × Colt Pinsak × Administration × Dashboard ×

Home Patient Record Medical History Insurance Clinical Financials Treatment Plan Patient Files

Colt Pinsak (704) 292-5225 Carol Pinsak (Parent)

15y1m (0)

### Patient Record for Colt Pinsak

#### Patient Record Control

Status	Active Inactive
Current Ortho Treatment Status	Consultation
Patient Since	06/11/2020
Last Seen	06/11/2020
Patient ID	PIN0620 <a href="#">Generate ID</a>
Model Box Number	0720004

CMP comes pre-configured with a list of common orthodontic treatment statuses, which can be used to classify each patient. You can use the administration controls to mark an unneeded ortho treatment status as inactive [Administration Tab > Practice Settings > Ortho Treatment Status]. Possible enhancements include the ability to rename treatment statuses, create new treatment statuses, and automatically assign and/or update a patient's ortho treatment status based on system events (e.g., initial appointment booking, contract activation, contract completion).



Name	Description	Status
Consultation		A
Diagnostic Records		A
Inactive		A
Initial Exam		A
New Patient		A
Observation		A
Pending		A

Once defined, the patient's current treatment status is visible in the Patient Record and Patient Homepage or from anywhere via the Patient Snapshot. Any time the patient's ortho treatment status is updated, the date is recorded so that team members will know how long the patient has been in the current treatment status.

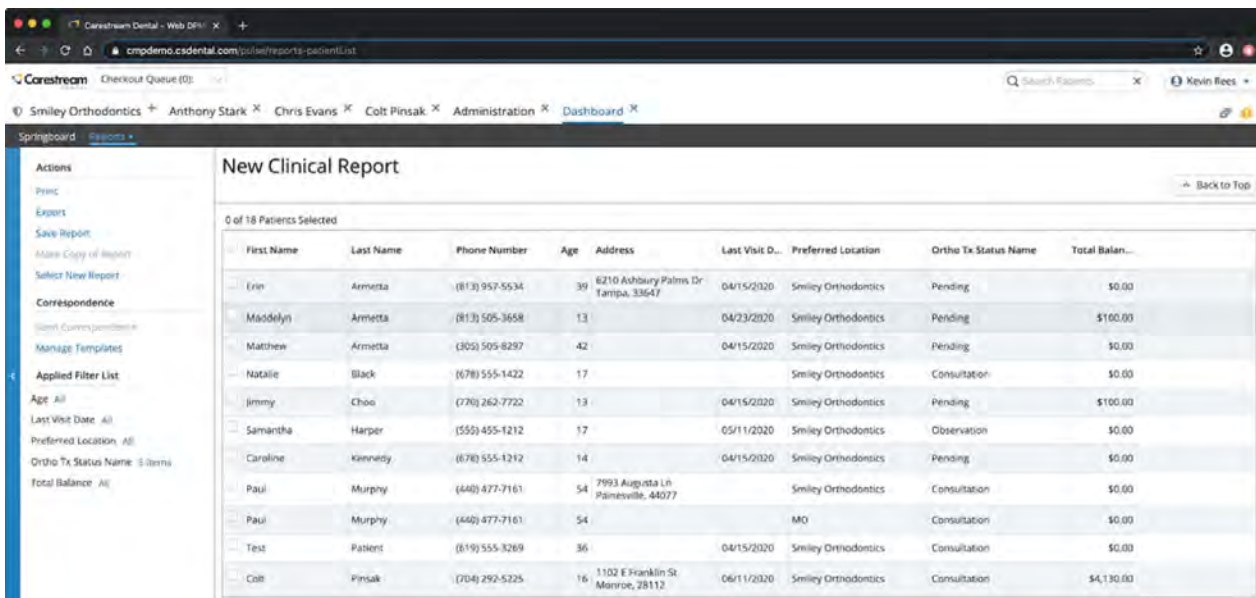
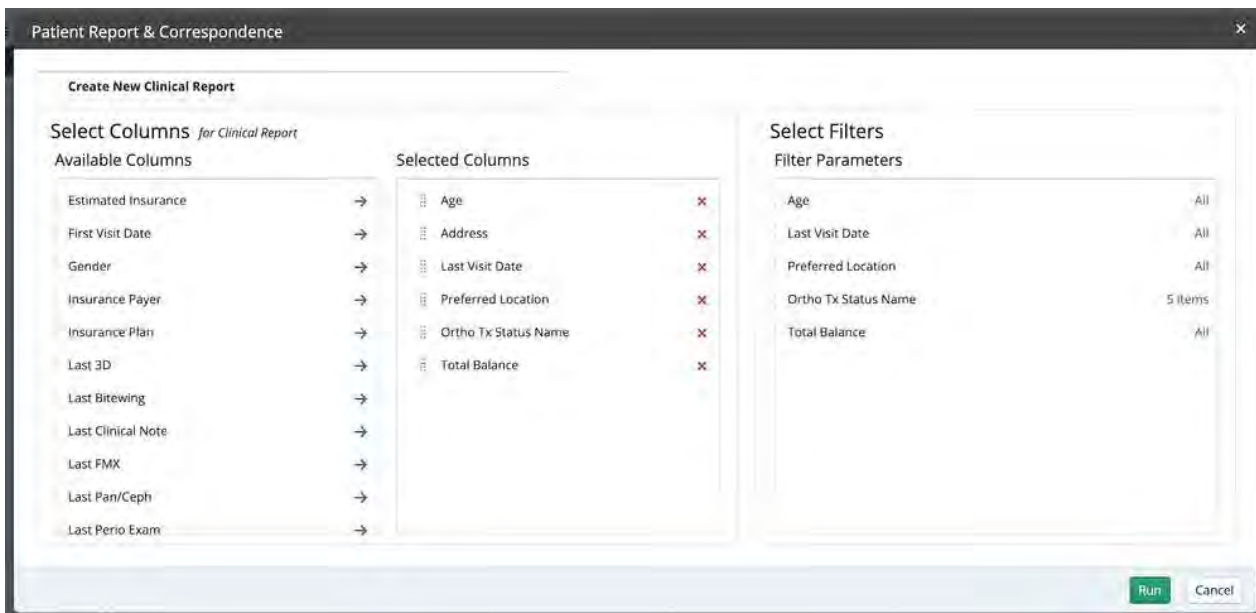
**Colt Pinsak**  
 RP: Carol Pinsak (Parent)  
 Pt ID: PIN0620

DOB: 06/01/2004      Status: **Active**  
 Mobile: (704) 292-5225      Ortho Tx Status: Consultation (since 01/04/2020)  
 Model Box: 0720004  
 Last Seen: 06/11/2020 - Smiley Orthodontics

**Snapshot**    Contact Info    Medical Alerts (0) +

Patient Balance: \$4,130.00    Colt Pinsak (Self)    Take Payment

The patient's ortho treatment status is also a merge field in the Correspondence Templates, so it can be used in patient correspondence. Additionally, ortho treatment status is a variable in the Patient List reporting, enabling you to generate lists of patients of a particular treatment status (e.g., 'Consultation', 'Observation', or 'Pending') to target correspondence or marketing efforts.



We hope that this new functionality improves your ability to classify your base of orthodontic patients. We look forward to your feedback on any additional enhancements we can make in support of your patient management workflows.

## Orthodontic Claim Workflow Enhancements

Several enhancements have also been implemented for the initial contract activation and claim generation workflow, making it clearer and more flexible for our orthodontic customers. Whenever a new ortho contract is activated, you are now provided with a notification that an initial insurance claim has

been generated and may require additional information to submit the claims to the clearinghouse. Additional enhancements are planned to further improve this process of getting the initial contract claim submitted.

An insurance claim to Blue Cross Blue Shield for \$6,750.00 has been created. [View Claim](#) X

The screenshot shows the Carestream Claims Management interface. The main header displays the patient's name, Caroline Thomas, and her parent, Melanie Thomas. The claim is for Smiley Orthodontics, provider Audrey Doyle, with a status of 'Needs Info'. The claim number is 1870000000000015P. The payer is Blue Cross Blue Shield, and the plan is BCBS of GA. The included codes are D8080, with a billed amount of \$6,750.00 and a paid amount of \$0.00. The claim summary includes a table of CDT codes:

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D8080	comprehensive orthodontic treatment of the adolescent dentition			Audrey Doyle	Today	\$6,750.00	None

Buttons for 'Print Claim', 'Edit Additional Info', 'Update Status', and 'Cancel Claim' are visible at the bottom of the claim summary.

The 'Additional Claim Information' dialog box contains the following fields:

- Box 35. Remarks: Phase I treatment; estimated 18mo
- Box 41. Date Appliance Placed: Today
- Box 42. Months of Tx Remaining: 18
- Box 44. Date of Prior Placement: (empty)

Buttons for 'Save Changes' and 'Cancel' are located at the bottom right of the dialog.

Additionally, you can now generate the initial contract claim even after contract activation, enabling you to handle cases in which patient insurance policy information has not been verified or entered when the contract was activated. As with all posted charges that are billable procedures (e.g., linked to CDT codes) but have not yet been claimed to insurance, users can review these charges and create new claims. The insurance claim can be generated directly via the Patient Ledger or via the location's Unbilled Procedures worklist [Location Tab > To Do > Unbilled Procedures] by selecting the associated initial contract charge and clicking 'Create'.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
07/01/2020	07/01/2020	Contract Charge	Full Tx	\$0.00	\$170.00	\$4,130.00
06/11/2020	06/11/2020	D8670	periodic orthodontic treatment visit	\$0.00	\$0.00	\$4,130.00
06/11/2020	06/11/2020	Check	Payment Check - 9890	-\$1,000.00	\$0.00	\$4,130.00
06/11/2020	06/11/2020	D8670	periodic orthodontic treatment visit	\$0.00	\$1,000.00	\$5,130.00
06/11/2020	06/11/2020	D8670	periodic orthodontic treatment visit	\$0.00	\$1,000.00	\$5,130.00
06/11/2020	06/11/2020	Contract Downpayment	Full Tx	\$0.00	\$1,000.00	\$5,130.00
06/11/2020	06/11/2020	Discount	DISCOUNT: Family Discount	-\$270.00	\$0.00	\$5,130.00
06/11/2020	06/11/2020	D8080	comprehensive orthodontic treatment of the adolescent dentition	\$5,400.00	\$0.00	\$5,400.00

Colt Pinsak - Create New Claim to Delta Dental

Unbilled procedures have been posted to the patient account. Select from the list below to bill this work to the patient's insurance. One or more insurance claims will be created and sent out electronically.

1 of 1 unbilled procedure(s) selected

Svc Date	Code	Description	Tooth/Quad	Surface(s)	Provider	Location	Amount
June 11, 2020	D8080	comprehensive orthodontic treatment of the adolescent dentition			Carestream Support	Smiley Orthodontics	\$5,400.00

One or more insurance claims to Delta Dental will be created for 1 selected procedure(s) Total to be claimed: \$5,400.00

**Create** Cancel

Finally, the initial transactions posted to the Patient Ledger following contract activation, such as the initial contract charge, the contract's discount, and any contract downpayment, now display the full transaction details. This allows claims to be created (or accessed) or adjustments to be posted, where applicable.

Trans. Type	Discount Amount	Pre-Balance	Post-Balance
Balance Discount	\$270.00	\$5,400.00	\$5,130.00
Discount Type	Family Discount		
Provider	Carestream Support		
Location	Smiley Orthodontics		
Posted by	Krystal Rollings at 9:14 am		

Trans. Type	Discount Amount	Pre-Balance	Post-Balance
Balance Discount	\$270.00	\$5,400.00	\$5,130.00
Discount Type	Family Discount		
Provider	Carestream Support		
Location	Smiley Orthodontics		
Posted by	Krystal Rollings at 9:14 am		

Trans. Type	Discount Amount	Pre-Balance	Post-Balance
Balance Discount	\$270.00	\$5,400.00	\$5,130.00
Discount Type	Family Discount		
Provider	Carestream Support		
Location	Smiley Orthodontics		
Posted by	Krystal Rollings at 9:14 am		



06/11/2020		06/11/2020		D8080		comprehensive orthodontic treatment of the adolescent dentition		\$5,400.00		\$0.00		\$5,400.00	
Charge Details													Adjust This Charge
Ins Claim		Create New Claim		Tooth/Quad		Posted By		Krystal Rollings at 9:14 am					
CDT Code		D8080		Surface(s)		Location		Smiley Orthodontics					
Provider		Carestream Support											
Comment													

We hope that these enhancements better support the contract activation and associated insurance claim generation workflows for our orthodontic CMP customers. We look forward to your feedback on what works well and what else can be done to improve support for orthodontic contract workflows.

## Optimizations and Fixes

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

1. Enhanced the process of closing the Financial Daysheet, allowing for the asynchronous processing of the period's transactions and freeing up the user to complete other work and receiving notification when the process is complete and reports are ready.
2. Addressed an issue in which part of the Pre-Authorization Claim records were sometimes missing, leading to rejection by the clearinghouse upon submission.
3. Fixed a defect in which the image type codes were sometimes not available when using the electronic claims attachments service to attach images to the claim record prior to submission.
4. Resolved an issue in which images were sometimes not displaying / available in CMP following acquisition. Note: Customers should re-install the imaging bridge on each acquisition computer [Patient Tab > Clinical > Images].
5. Fixed a UI defect in which the RP address was sometimes not being displayed in the Patient Snapshot contact details for converted data records.
6. Addressed a bug which would sometimes cause the Recare List to fail when specific conditions created backend errors.

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