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CMP Weekly Release 0.1.5130 (Part 1)

Care Management Platform (CMP)

Weekly Release

Build 0.1.5130 | July 29th, 2020

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

Automated Statements Integration

CMP now integrates with Carestream Dental's Automated Statements service, enabling you to stop printing and mailing statements. Our clearinghouse will handle the process for you. Once you enroll in the service, your statement data

is transmitted to our clearinghouse for statement creation and distribution whenever you generate bulk statements. No additional configuration is needed to make the transition.

If you have been using CMP's existing 'Bulk Statement Generation' functionality, then the transition to Automated Statements will be virtually seamless. For customers not enrolled in our Automated Statements service, the existing bulk statement generation to the .PDF format is unchanged. If your practice has enrolled, statement batches will henceforth be transmitted to Carestream Dental's clearinghouse for processing. NOTE: Individual billing statements can still be generated directly in CMP for printing and distribution via the Patient Ledger or the Accounts Receivable interfaces.

The screenshot shows the 'Accounts Receivable' interface in the Carestream system. The top navigation bar includes 'Home', 'Schedule', 'Financial', 'Claims', 'eServices', and 'To Do'. The main header displays 'Smiley Dental Surgery' and '5150 Wooded Glen Drive'. The interface is filtered by 'All Non-Zero' accounts.

Summary of Due Amounts:

Category	Amount	Count	Percentage
Current Due	\$5,983.72	31 accts	100%
0-30 Days	\$1,510.00	12	38.7%
31-60 Days	\$17.00	0	0%
61-90 Days	\$0.00	0	0%
91+ Days	\$4,473.72	22	71%
Insurance Due	-\$862.00	0 accts	0%
Contract Balance	\$0.00	0 accts	0%
Total Balance	\$5,983.72	37 accts	100%

Account Details Table:

Patient Name	Last Statement	Last Paid	Total Balance	Current Due	0-30	31-60	61-90	91+	Patient Due	Insurance Due	Contract Balance
Jerry Steins		05/24/2017	\$96.00	\$96.00	\$0.00	\$0.00	\$0.00	\$96.00	\$161.00	-\$65.00	\$0.00
Neil Khin			\$460.00	\$460.00	\$0.00	\$0.00	\$0.00	\$460.00	\$460.00	\$0.00	\$0.00
Timothy Walker	08/15/2017		-\$29.00	-\$29.00	-\$29.00	\$0.00	\$0.00	\$0.00	-\$29.00	\$0.00	\$0.00
Emily Khin	06/26/2020		\$321.00	\$321.00	\$2.00	\$0.00	\$0.00	\$319.00	\$321.00	\$0.00	\$0.00
Terrence Molarnator	08/15/2017		\$281.00	\$281.00	\$0.00	\$0.00	\$0.00	\$281.00	\$281.00	\$0.00	\$0.00
Clara Rhodes	07/31/2017		\$114.00	\$114.00	\$0.00	\$0.00	\$0.00	\$114.00	\$410.00	-\$296.00	\$0.00
Jude Gamble	08/02/2017		\$279.00	\$279.00	\$179.00	\$0.00	\$0.00	\$100.00	\$279.00	\$0.00	\$0.00
Noah (10) Gustafson			\$792.00	\$792.00	\$792.00	\$0.00	\$0.00	\$0.00	\$792.00	\$0.00	\$0.00
Jenna Herman	06/12/2017		\$65.00	\$65.00	\$0.00	\$0.00	\$0.00	\$65.00	\$146.00	-\$81.00	\$0.00

The interface also includes a sidebar with 'Actions' (Print Current View, Generate Billing Statements), a 'Filter the Transactions' section, and a 'Show Only Accounts with Exceptions' checkbox. A patient profile for Jerry Steins is expanded, showing contact information and appointment details.

From the Accounts Receivable interface [Location Tab > Financial > Accounts Receivable], select 'Generate Billing Statements'. Use the filter list to determine which patients to include in the statement run. As you specify the criteria, CMP automatically displays the number of statements that will be generated in the batch. Once set, click 'Generate' to transmit the records to the clearinghouse. Patients should receive their statements in the mail within a few business days.

Home Schedule Financial

Smiley Dental Surgery
5150 Wooded Glen Drive

Actions

- Print Current View
- Generate Billing Statements

Filter the Transactions

Account Type

All Non-Zero

Doctor

All doctors

Show Only Accounts with Exceptions

Confirm Billing Statement Settings

Set Statement Due Date as: 30 days from today

Exclude if Last Statement Sent Within: 14 days

Exclude if Last Payment Posted Within: 30 days

Exclude if Account Balance Less Than: \$100.00

Exclude if Account Has Insurance Due Balance

30 of 31 statements will be generated

Generate Save Cancel

Back to Top

91+ Days	Insurance Due	Contract Balance	Total Balance
\$4,473.72	-\$862.00	\$0.00	\$5,983.72
22 / 73%		0 accts / 0%	31 accts / 100%

	91-90	91+	Patient Due	Insurance Due	Contract Balance
0	\$0.00	\$0.00	\$96.00	\$161.00	-\$65.00
0	\$0.00	\$0.00	\$460.00	\$460.00	\$0.00
0	\$0.00	\$0.00	\$0.00	-\$29.00	\$0.00
0	\$0.00	\$0.00	\$319.00	\$321.00	\$0.00
0	\$0.00	\$0.00	\$281.00	\$281.00	\$0.00
0	\$0.00	\$0.00	\$114.00	\$410.00	-\$296.00
0	\$0.00	\$0.00	\$100.00	\$279.00	\$0.00
0	\$0.00	\$0.00	\$0.00	-\$29.00	\$0.00
0	\$0.00	\$0.00	\$65.00	\$146.00	-\$81.00
0	\$0.00	\$0.00	\$9.00	\$9.00	\$0.00
0	\$0.00	\$0.00	\$65.00	\$130.00	-\$65.00
0	\$0.00	\$0.00	\$65.00	\$65.00	\$0.00
0	\$0.00	\$0.00	\$0.00	\$0.00	-\$65.00
0	\$0.00	\$0.00	\$0.00	\$0.00	-\$65.00
0	\$0.00	\$0.00	\$75.00	\$75.00	\$0.00

Name	Date	Balance	Insurance	Contract	Total
Clara Rhodes	07/31/2017	\$114.00	\$114.00	\$0.00	\$0.00
Jude Gamble	08/02/2017	\$279.00	\$279.00	\$179.00	\$0.00
Noah (10) Gustafson		\$792.00	\$792.00	\$792.00	\$0.00
Jenna Herman	06/12/2017	\$65.00	\$65.00	\$0.00	\$0.00
Chauncey Hendrix	10/29/2019	\$9.00	\$9.00	\$0.00	\$0.00
Ralph Houston	03/22/2017	\$65.00	\$65.00	\$0.00	\$0.00
Ari Schroeder	04/01/2017	\$65.00	\$65.00	\$0.00	\$0.00
Carey Hampton	08/04/2017	-\$65.00	-\$65.00	-\$65.00	\$0.00
Sonia Young	06/22/2020	\$75.00	\$75.00	\$75.00	\$0.00

POWER RANCH PRACTICE AT BROOKSIDE PARK
 DENTAL ASSOCIATES INCORPORATED YOUR ONE
 STOP FOR EVERYTHING ORAL HEALTH CALL US
 290 E STAMPEDE DR
 PHOENIX, AZ 85279

14733-C287



007771
0102

RETURN SERVICE REQUESTED

STATEMENT DATE	PAY THIS AMOUNT	ACCT. #
06/15/20	\$681.00	

DUE DATE: 06/29/20
 PAGE: 2 of 2

SHOW AMOUNT
PAID HERE \$



14733-C287**TSJ192410000302

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 PHOENIX, AZ 85279

Please check box if address is incorrect or insurance information has changed, and indicate change(s) on reverse side.

STATEMENT

PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT

Date	Description	Reference	Charges	Credits		
06/08/20	ADJUSTMENT: DISCOUNT IN ERROR	NOAH	20.00	0.00		
06/08/20	ADJUSTED: DISCOUNT: COURTESY DISCOUNT	NOAH	-20.00	0.00		
06/08/20	PAYMENT CASH	NOAH	0.00	-50.00		
06/08/20	[D9310] CONSULTATION - DIAGNOSTIC SERVICE PROVIDED BY DENTIST OR PHYSICIAN OTHER THAN REQUESTING DENTIST OR PHYSICIAN - DESMOND MILES	NOAH	150.00	0.00		
	PREVIOUS BALANCE	NOAH	172.00	0.00		
<p>FUTURE APPOINTMENTS: NOAH GUSTAFSON: 7/9/2020 @ 8:00 PM, NOAH GUSTAFSON: 1/9/2021 @ 8:00 PM, ANGELIA DILLON: 1/9/2021 @ 9:30 PM</p>						
0-30	31-60		PREVIOUS PREVIOUS	RECENT ACTIVITY	TOTAL BALANCE	
594.00	0.00	0.00	87.00	172.00	509.00	\$681.00

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 FOR BILLING INQUIRIES, PLEASE CALL: (786) 555-8967

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When the transmission is successful, the clearinghouse returns a notification of how many statements were received. If any of the records are missing required information (such as a street address), you are prompted to take action. NOTE: A filter has been added to the Accounts Receivable UI that enables you to highlight those accounts to prevent future billing issues.

Jenna Herman	Today	06/12/2017	\$65.00	\$65.00	\$0.00	\$0.00	\$0.00	\$0.00
Chauncey Hendrix	Today	10/29/2019	\$9.00	\$9.00	\$0.00	\$0.00	\$0.00	\$0.00
Ralph								\$0.00
Ari S								\$0.00
Care								\$0.00
Sonia Young	Today		\$75.00	\$75.00	\$75.00	\$0.00	\$0.00	\$0.00

29 billing statements have been successfully transmitted to the clearinghouse. Patients will receive mail- or email-based statements based on their defined preference. A copy of each CMP billing statement has been also added to the Patient Files for each patient.

Statement Batch Includes Accounts with Exceptions

This batch of statements includes some patient accounts that have missing information that is required to generate a billing statement. This is usually due to an address not being defined within the Patient Record. Please correct these issues before generating the batch of billing statements or you can elect to exclude these statements from the current batch.

Accounts included in this batch: 6
Accounts with missing information: 2

[Exclude From Batch](#) [Cancel](#)

Carestream | Checkout Queue (1) | J. Marks 09:15 pm | Search Patients | Mark Pool

Power Ranch Practice | Smiley Dental Surgery | All Locations | Administration | Dashboard

Home | Schedule | **Financial** | Claims | eServices | To Do

Accounts Receivable

Filtered by All Non-Zero, Desmond Miles

Current Due	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due	Contract Balance	Total Balance
\$1,945.11	\$1,178.00	\$125.00	\$0.00	\$642.11	-\$182.00	\$0.00	\$1,945.11
6 accts / 100%	5 / 83.3%	1 / 16.7%	0 / 0%	3 / 50%	0 accts / 0%	0 accts / 0%	6 accts / 100%

Patient Name	Last Statement	Last Paid	Total Balance	Current Due	0-30	31-60	61-90	91+	Patient Due	Insurance Due	Contract Balance
noadd noadd	06/12/2017		\$461.00	\$461.00	\$396.00	\$0.00	\$0.00	\$65.00	\$461.00	\$0.00	\$0.00
noadd_kid	06/10/2020		\$530.00	\$530.00	\$0.00	\$0.00	\$0.00	\$530.00	\$712.00	-\$182.00	\$0.00
noadd_kid			\$150.00	\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00
noadd_kid			\$300.00	\$300.00	\$300.00	\$0.00	\$0.00	\$0.00	\$300.00	\$0.00	\$0.00
Noah (02) Gustafson	07/17/2020	06/10/2020	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
Noah (07) Gustafson	07/17/2020	06/10/2020	\$404.11	\$404.11	\$232.00	\$125.00	\$0.00	\$47.11	\$404.11	\$0.00	\$0.00

⚠ Patient record has missing information; address needed.

The details of each Automated Statements batch are documented in the 'Bulk Statement Reports' list [Location Tab > Financial > Bulk Statement Reports]. A .PDF version of each billing statement sent to the clearinghouse is also automatically saved to 'Patient Files', providing an internal copy of the statement [Patient Tab > Patient Files]. NOTE: All previously generated [print version] bulk statement reports are still available for review and download from the 'Bulk Statement Reports' list.

Generated On	Generated By	Statement Count	Type	Printed	Emailed	Due Date	Total Amount
Fri, Jul 24, 2020 7:47 AM	Mr. Mark Poole	29	Auto Stmt	29	0	08/23/2020	\$5,911.72
Thu, Apr 30, 2020 7:25 AM	Mr. Mark Poole	5	Bulk Print	5	N/A	05/30/2020	\$839.72

Finally, there is a new field in the Patient Record you can use to define a patient's preference for receiving statements by mail or email. If you choose to include support for Online Statements when enrolling in Automated Statements, these patients will receive an email with a secure web link to an online version of their statement instead of a paper statement.

Statement Delivery

Mail
 Email

Specify whether the patient prefers to receive account statement by mail - using the patient's primary address - or email - using the patient's email on record (if available). Mail-based statements will include receiving standard paper-based statements in the post, while email-based statements will provide a secure web link that can be used to view the statement online.

From: POWER RANCH PRACTICE AT BROOKSIDE PARK DENTAL ASSOCIATES INCORPORATED YOUR ONE STOP FOR EVERYTHING ORAL HEALTH CALL US (Do Not Reply) <NoReply@e-Service.net>
 Sent: Monday, July 6, 2020 9:04 PM
 To: NOAH GUSTAFSON
 Subject: Online Statement from POWER RANCH PRACTICE AT BROOKSIDE PARK DENTAL ASSOCIATES INCORPORATED YOUR ONE STOP FOR EVERYTHING ORAL HEALTH CALL US

**POWER RANCH PRACTICE AT BROOKSIDE PARK DENTAL ASSOCIATES
 INCORPORATED YOUR ONE STOP FOR EVERYTHING ORAL HEALTH CALL US**
 (786) 555-8967

290 E STAMPEDE DR
 PHOENIX, AZ 85279

Dear NOAH GUSTAFSON,

A new statement from POWER RANCH PRACTICE AT BROOKSIDE PARK DENTAL ASSOCIATES INCORPORATED YOUR ONE STOP FOR EVERYTHING ORAL HEALTH CALL US is now available online.

Account #	Statement Date	Amount	Due By
	7/6/2020	\$691.00	7/20/2020

To access this statement, please click [here](#).

Thank You,

POWER RANCH PRACTICE AT BROOKSIDE PARK DENTAL ASSOCIATES INCORPORATED YOUR ONE STOP FOR EVERYTHING ORAL HEALTH CALL US

Please do not reply to this email. It was sent from a notification-only address.
 If you have any questions about this email, please contact your doctor's office directly.

ONLINE
Statement
 ACCESS



Home Logout

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NOAH GUSTAFSON

Account #

Pay Now

Print

POWER RANCH PRACTICE AT BROOKSIDE PARK
 DENTAL ASSOCIATES INCORPORATED YOUR ONE
 (786) 555-8967

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 PHOENIX, AZ 85279

Account	Account #	Amount Due	Billed On	Pay By
NOAH GUSTAFSON		691.00	07/06/20	07/20/20

Date	Description	Reference	Charges	Credits
07/06/20	CURRENT BALANCE	NOAH	691.00	
	[D9310] CONSULTATION - DIAGNOSTIC SERVICE PROVIDED BY DENTIST OR PHYSICIAN OTHER THAN REQUESTING DENTIST OR PHYSICIAN - JON BARNES	NOAH	75.00	
07/06/20	ADJUSTMENT: WRONG CHARGE AMOUNT	NOAH		-100.00
	PREVIOUS BALANCE	NOAH	716.00	

FUTURE APPOINTMENTS: NOAH (01) GUSTAFSON: 7/9/2020 @ 8:00 PM, NOAH (01) GUSTAFSON: 1/9/2021 @ 8:00 PM, ANGELIA DILLON: 1/9/2021 @ 9:30 PM

0-30	31-60	61-90	91+	PREVIOUS BALANCE	RECENT ACTIVITY	TOTAL BALANCE
669.00	0.00	0.00	22.00	716.00	-25.00	691.00

This integration provides CMP customers with a faster, easier way to issue patient account statements. We look forward to hearing how this new eService offering enables you to more easily manage patient billing workflows.

Medical History Questionnaire Customization

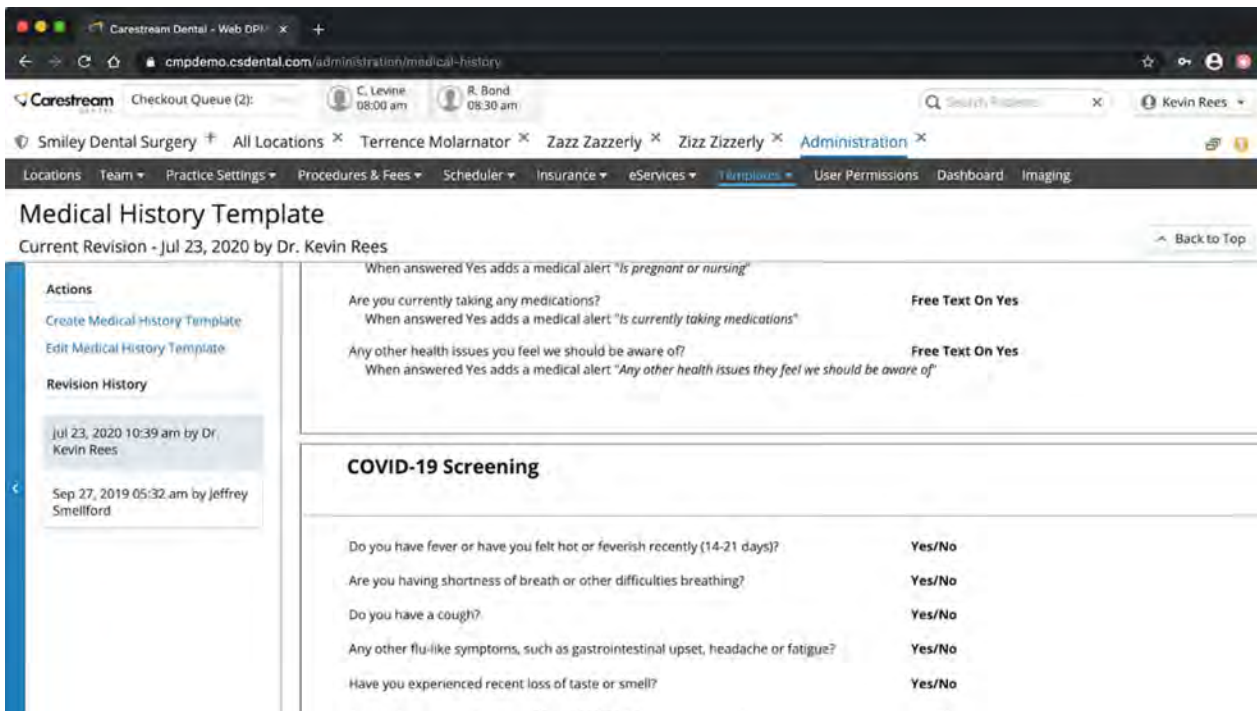
Based on customer requests, CMP now enables you to customize the questionnaire used to collect patient medical histories. A default version of the medical history questionnaire was initially implemented for immediate use.

However, you can now customize its contents to better suit your specific needs. Visit the new 'Medical History Template' interface to view and manage the template used to collect new patient medical histories [Administration Tab > Templates > Medical History Template]. CMP's current medical history questionnaire has been automatically created as the initial revision of the template.

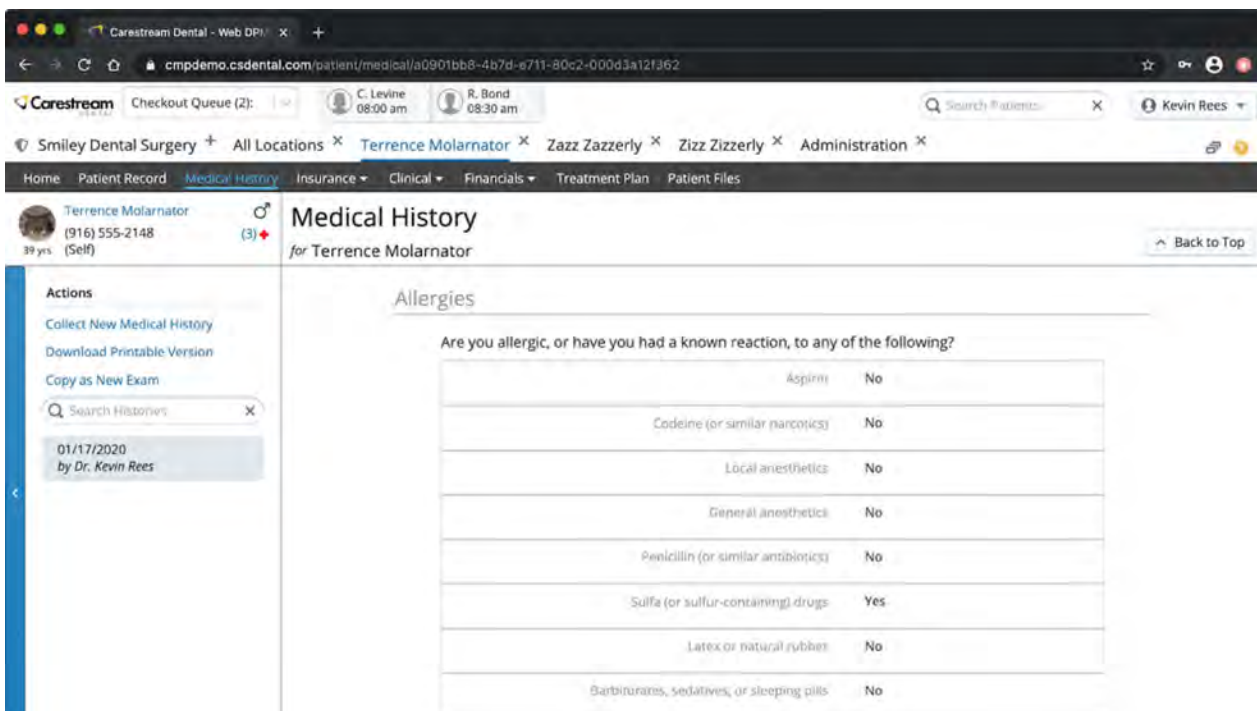
The screenshot displays the 'Medical History Template' interface. The browser address bar shows the URL 'cmpdemo.cs dental.com/administration/medical-history'. The page title is 'Medical History Template' and the subtitle is 'Current Revision - Sep 27, 2019 by Jeffrey Smellford'. On the left, there is a sidebar with 'Actions' (Create Medical History Template, Edit Medical History Template) and 'Revision History' (Sep 27, 2019 05:32 am by Jeffrey Smellford). The main content area is titled 'Allergies' and contains the question 'Are you allergic, or have you had a known reaction, to any of the following?'. Below this are six items with 'Yes/No' response options: Aspirin, Codeine (or similar narcotics), Local anesthetics, General anesthetics, Penicillin (or similar antibiotics), and Sulfa (or sulfur-containing) drugs. Each item includes a note: 'When answered Yes adds a medical alert: [Drug Name]'.

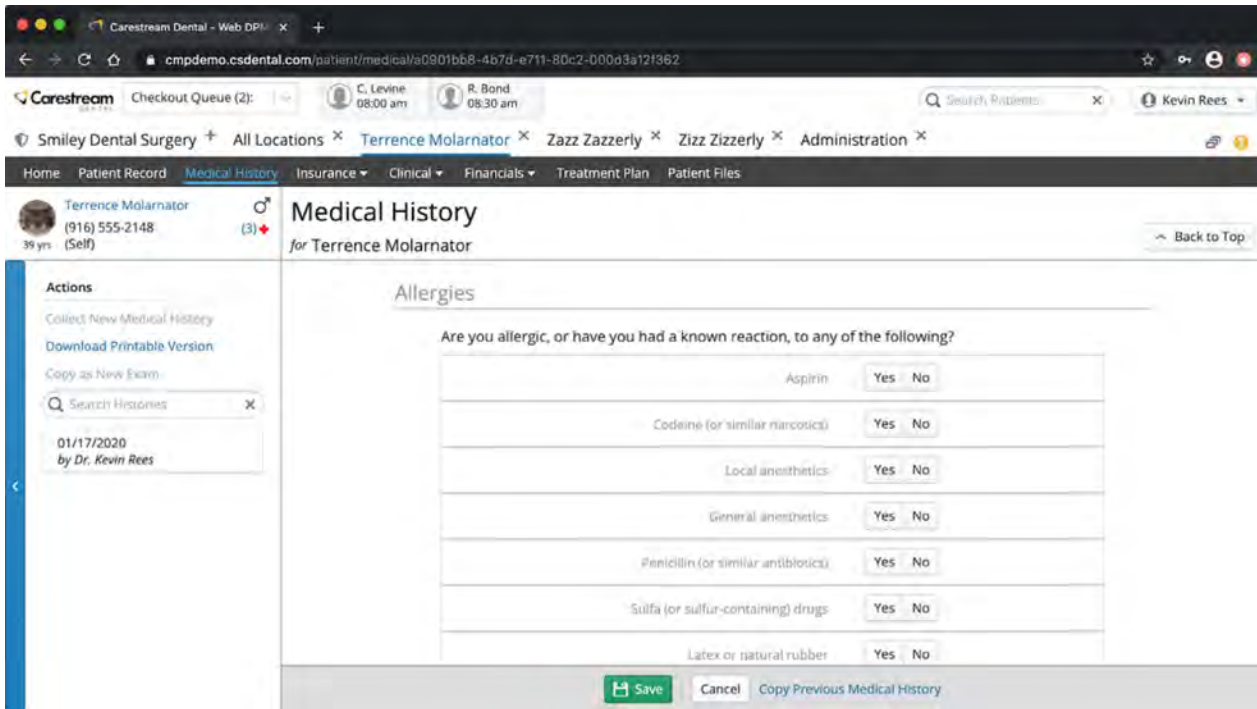
From the Medical History Template, click 'Create' or 'Edit' to modify the template to suit your practice's needs. You can create new sections of the questionnaire with specific questions for conditions and items you want to document. You can drag and drop questions to reorder them within each section. CMP supports several default question types, including basic free text, simple yes or no, or conditional response that requires additional clarification based on a Yes or No response. You can also configure questions to automatically add a new medical alert to the patient record if the recorded response meets the defined criteria.

Once saved, this new version of the template will be used to collect all new patient medical histories. You can still review all of the previous versions of the template and even revert back to an older version to use as the current template. NOTE: Existing patient medical histories, collected using previous versions of the template, can still be viewed in the patient's record [Patient Tab > Medical History].



As previously mentioned, the current version of the template is used whenever collecting a new patient medical history. You can now click 'Copy as New Exam' to quickly generate a new, completed history which can then be modified with any changes since last visit [Patient Tab > Medical History]. There is also a 'Copy Previous Medical History' action when collecting a new medical history. These options are available if the template has not been modified since the last time a patient's medical history was collected.





We are excited to provide this much-requested functionality to our CMP customers. These enhancements should make the medical history functionality better align with the unique needs of individual practices. Upcoming enhancements include the ability to edit a medical history on the same day that it was recorded, as well as the ability to answer 'No to All' to more quickly complete patient histories. Please let us know if there are any additional improvements needed to support your related clinical workflows.

[0.1.5130 RELEASE UPDATES CONTINUED ON PART 2]

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Atlanta, GA 30339

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