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CMP Weekly Release 0.1.5130 (Part 2)

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.

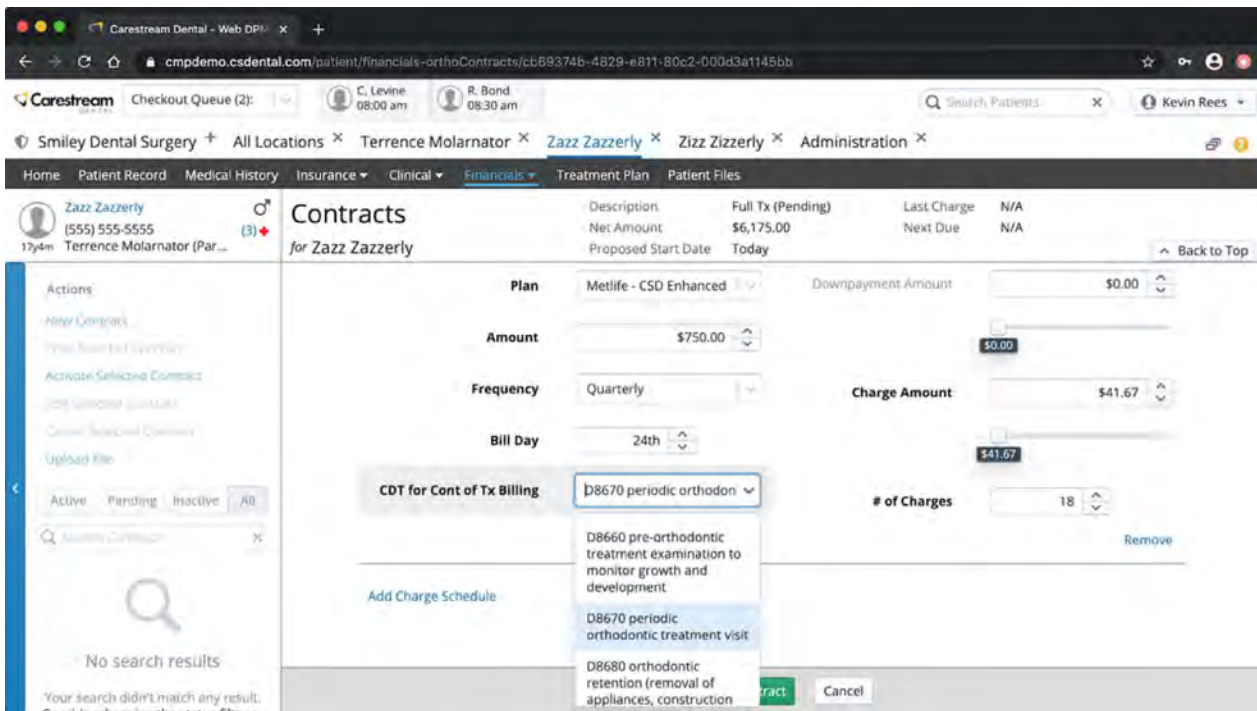
[0.1.5130 RELEASE UPDATES CONTINUED FROM PART 1]

Orthodontic Contract and Claim Enhancements

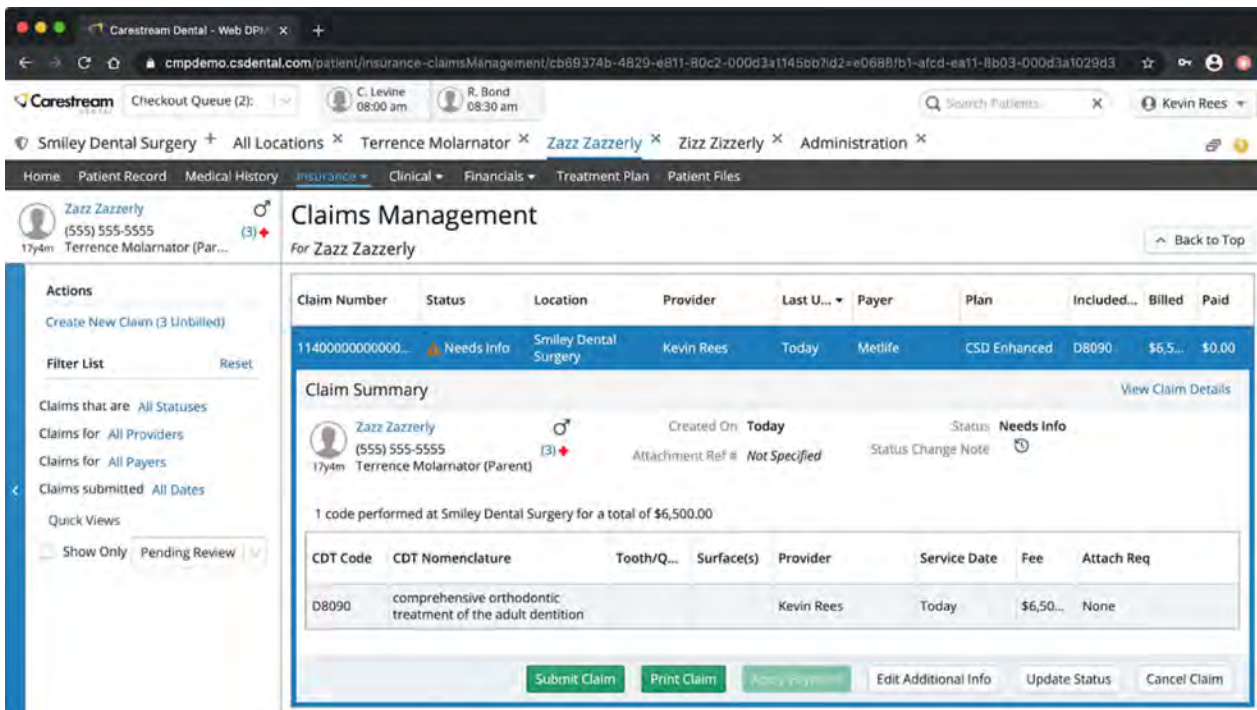
Several enhancements have been implemented in the orthodontic contract and claim functionality. The subset of CDT codes presented when selecting the 'CDT for Billing' procedure has been streamlined for orthodontic billing [Patient Tab > Financial > Contracts]. You are still free to choose any available CDT code (in case payer requirements are unusual), but this enhancement should make it easier to find and select the correct code for the initial claim.

Additionally, you can now specify the billing code to be used for continuation of treatment claims in case a different CDT code is needed for ongoing insurance billing.

The screenshot shows the 'Contracts' page for patient Zazz Zazerly. The page includes a navigation bar with 'Home', 'Patient Record', 'Medical History', 'Insurance', 'Clinical', 'Financials', 'Treatment Plan', and 'Patient Files'. The 'Financials' tab is active, showing contract details for Zazz Zazerly, including 'Description', 'Full Tx (Pending)', 'Net Amount' (\$6,175.00), and 'Proposed Start Date' (Today). A dropdown menu for 'CDT for Initial Billing' is open, displaying a list of CDT codes: D8010 limited orthodontic treatment of the primary dentition, D8020 limited orthodontic treatment of the transitional dentition, D8030 limited orthodontic treatment of the adolescent dentition, and D8040 limited orthodontic treatment of the adult dentition. The 'Contract Charge Schedules' table is also visible, with columns for 'Guarantor', 'Amount', 'Frequency', and 'Bill Day'. The 'Amount' column shows a value of \$50.00. The 'Contract Total' is \$6,175.00. The page also features a 'Save Contract' button and a 'Cancel' button.



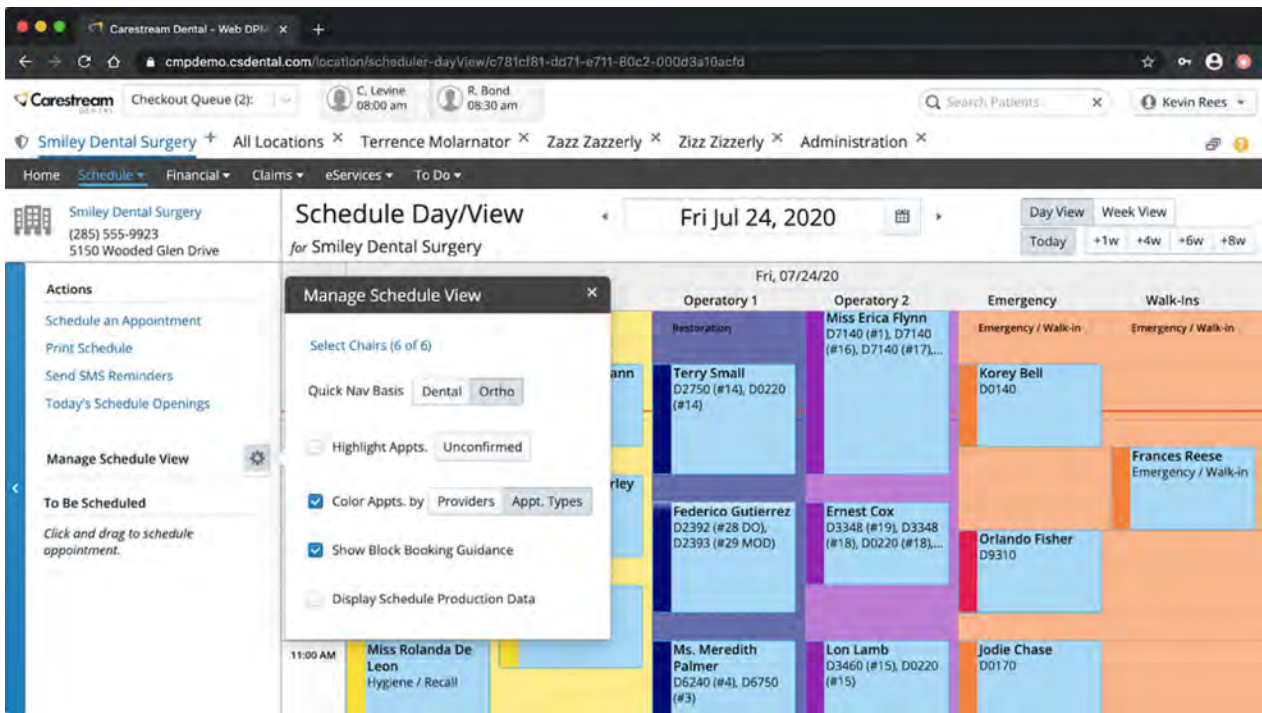
The Claims Submission workflow has been enhanced to provide a more direct means of queuing claims that require additional information. Initial contract claims are automatically assigned a 'Needs Info' status when generated, to provide the opportunity to define key data, such as the date an appliance was placed or the remaining months of treatment. The 'Save Changes & Submit' button enables you to submit directly from this interface, saving time. You can also submit claims directly with the 'Submit Claim' button. CMP prompts you if additional claim information is needed.



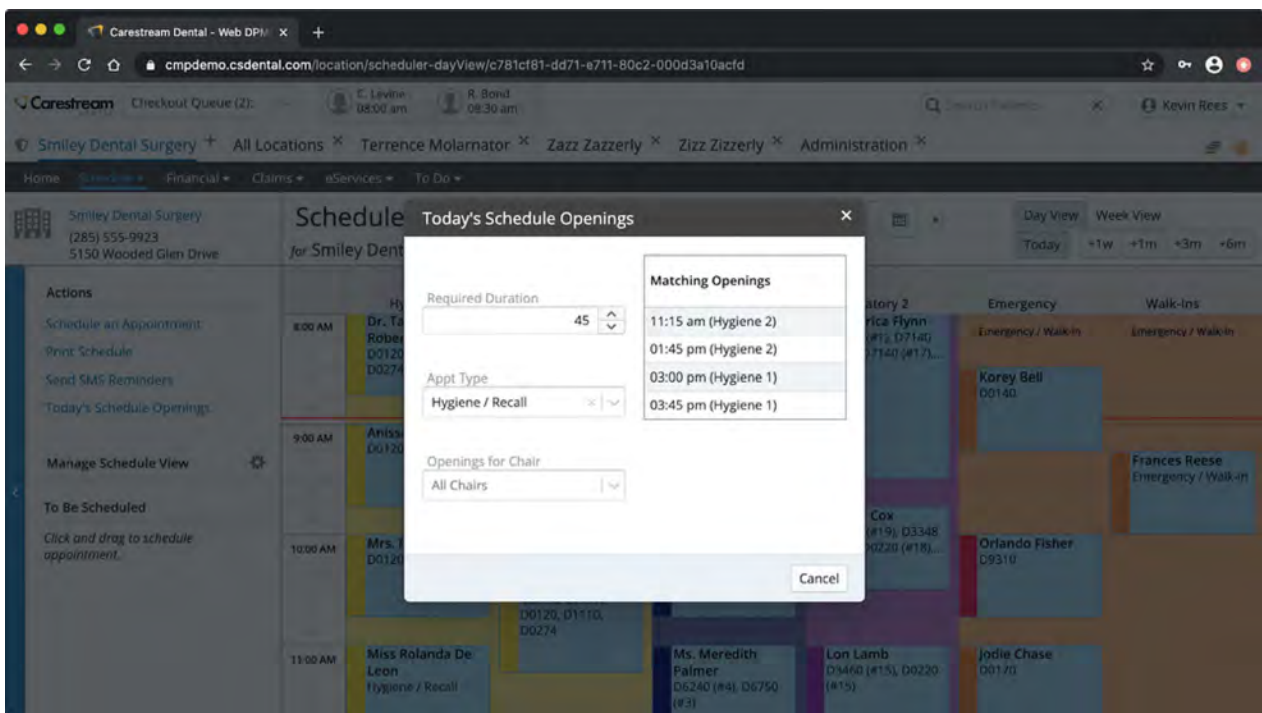
We hope that these enhancements continue to improve your experience. We look forward to your feedback on what works well and what else can be done to improve support for your orthodontic contract and claim workflows.

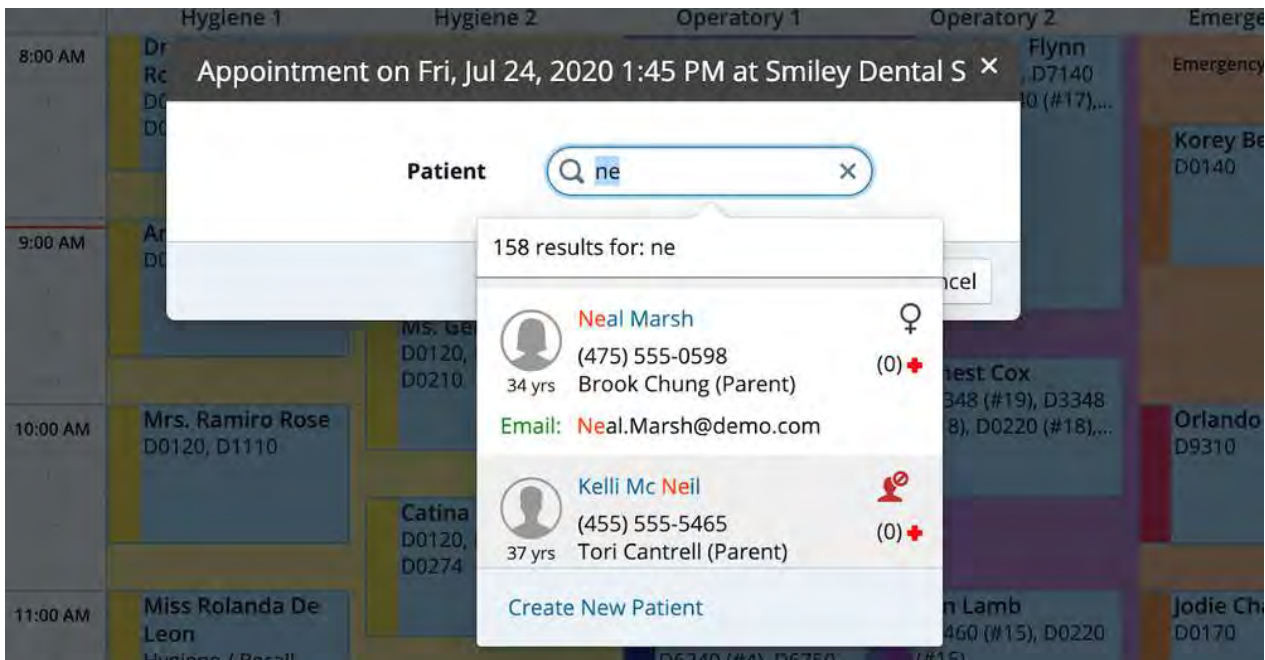
Schedule DayView Enhancements

In response to customer feedback, a few enhancements have been implemented in the Schedule DayView. You can now choose time intervals for the 'quick jump' navigation controls available in the upper righthand corner of the Schedule DayView. These controls are used to jump ahead in calendar days when booking a patient's next appointment. The 'Quick Nav Basis' control can now be set and changed for each location [Location Tab > Schedule > Day/Week View]. Click the 'Manage Schedule View' "cog" and choose 'Dental' for the +1w, +1m, +3m, +6m defaults or 'Ortho' for the +1w, +4w, +6w, +8w version.



When trying to find a potential opening within a packed schedule, you now have access to a list of the day's openings without having to scroll around and hunt for them. Click on "Today's Schedule Openings" in the side panel of the Schedule Dayview to display the list of available openings [Location Tab > Schedule > Day/Week View]. You can modify the criteria used to calculate a schedule opening, such as the required duration, chair, or even appointment type (if Block Booking templates are in use). Click on an opening to pre-select the time on the Schedule DayView and start the standard appointment booking workflow.





These enhancements should help support the scheduling workflows of our ortho offices, as well as large offices with lots of chairs / operatories (or small computer displays). We look forward to any feedback on additional enhancements that can improve your appointment scheduling efficiency.

Patient Ledger Enhancements

In response to customer feedback, several enhancements have been made to the Patient Ledger. You can now filter the ledger view by transaction type, selecting one or more types to generate a more focused view of the patient's financial history (e.g., payments only). You can also now search for specific financial transactions, based on the transaction (or service / acceptance) date, code, description, or amount. NOTE: Whenever the Patient Ledger's transaction list is filtered, the Balance column details are hidden to avoid confusion.

Ledger for Abram Sheppard

Total Due	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$431.10	\$431.10	\$0.00	\$0.00	\$0.00	-\$50.00	\$481.10

Trans Date	Svc Date	Code	Description	Amount	Balance
Today	Today	Discount	DISCOUNT: Courtesy Discount	-\$47.90	\$431.10
Today	Today	Credit Card	Payment Credit Card	-\$250.00	\$479.00
Today	Today	Payment Adjustment	ADJUSTMENT: Wrong Payment Amount	\$450.00	\$729.00
Today	Today	Credit Card	ADJUSTED: Payment Credit Card	-\$450.00	\$279.00
Today	Today	Charge Adjustment	ADJUSTMENT: Charge in Error	-\$150.00	\$729.00
Today	Today	D9310	ADJUSTED: consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician	\$150.00	\$879.00
01/10/2019	01/10/2019	Insurance	Payment insurance - MetLife Remit #1234567890	-\$50.00	\$729.00
01/10/2019	01/10/2019	Check	Payment Check - chk#4567	-\$50.00	\$779.00
01/10/2019	01/10/2019	Cash	Payment Cash - 4 10s & 2 5s	-\$50.00	\$829.00
01/10/2019	01/10/2019	Credit Card	Payment Credit Card - AMEX0123	-\$50.00	\$879.00

Select Transaction Types

Search: Insurance Payments

Buttons: Save, Cancel

ADJUSTED: consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician

Additionally, you can hide corrective financial transactions from the ledger view. These include adjustments to charges, payments, discounts, write-offs, or refunds when a mistake has occurred (e.g., Charge in Error, Wrong Payment Amount, etc.). These transactions are mathematically off-setting and have an

overall net zero impact on the patient's account balance. NOTE: These transactions are now automatically suppressed from billing statements, whenever possible, regardless of the filter setting. Corrective transactions are only displayed in statements when needed to explain a change in the account balance from the previous statement.

Trans. No.	Set Date	Code	Description	Amount	Balance
0044	7/6/19	CHQ	DISCOUNT - Courtesy Discount	-47.90	\$411.10
0045	7/6/19	CC	Payment Credit Card	-276.00	\$135.10
01142000	01/10/2019	INSUR	Insurance Payment - Health Benefit #118902800	\$10.00	\$125.10
01142014	01/10/2019	CLIN	Payment Check - 01840047	-10.00	\$115.10
01142015	01/10/2019	CC	Payment Cash - 116 & 2 50	-10.00	\$105.10
01142016	01/10/2019	CC	Payment Credit Card - 454 901 21	-10.00	\$95.10
00250014	00/00/2018	001	Service oral evaluation - Inadmitted patient	\$62.00	\$157.10
00250015	00/00/2018	001	Consultation - diagnostic services provided by dentist or physician when claim requesting service is physician	\$150.00	\$307.10

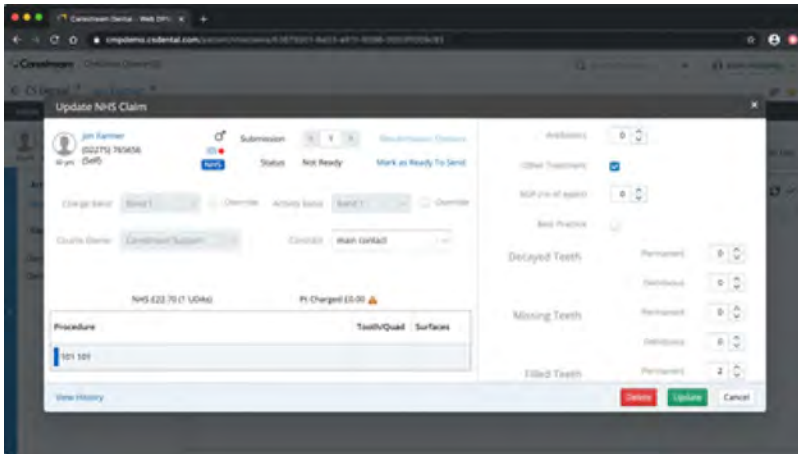
Date	Set Date	Description	Charges	Payments	Balance
7/23/2019	7/23/2019	Current Balance			\$431.15
7/23/2019	7/23/2019	DISCOUNT - Courtesy Discount	-47.90		\$411.10
7/23/2019	7/23/2019	Payment Credit Card		-276.00	\$135.10
		Previous Balance			\$125.10

We are excited to provide these much-requested enhancements and hope that they improve support for your financial workflows. Please let us know if there are any additional improvements needed to better support your needs.

[UK] NHS AGP Reporting

Our CMP customers in the UK will soon be able to report the number of appointments with aerosol generating procedures (AGPs) when filing NHS dental claims, in compliance with the upcoming NHS CCN 42 regulation. Beginning August 1st, the 'Clinical Data Set / DMF' section of the NHS Claim UI will include a new 'AGP (no of appts)' field [Location Tab > NHS Claims > Claims Management]. For any NHS dental claim produced with an Acceptance Date of August 1, 2020 or later, you can select to override the automatically generated claim values and assign the number of appointments involving

AGPs. For example, if the course of treatment included a series of two appointments involving 3 fillings and a crown, then a value of '2' should be entered.



Optimizations and Fixes

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

1. Resolved an issue in which medical alerts were being duplicated in the tenant's master list when automatically generated via the medical history questionnaire.
2. Addressed a UI defect in the Accounts Receivable screen to fix the 'Last Paid' column sorting logic.
3. Fixed a bug in the Accounts Receivable list in which the 'Last Paid' date was being incorrectly assigned under certain conditions.

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