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**MOD kevin\_moloney**

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08-13-2020 09:11 AM

CMP Weekly Release 0.1.5202 (Part 1)

# Care Management Platform (CMP)

Weekly Release

Build 0.1.5202 | August 13th, 2020

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

## CMP Ortho Features Now Generally Available

The orthodontic feature set in CMP is now generally available, following the completion of the Beta program. Contact your Carestream Dental sales representative to find out more about enabling these features for your practice.

While recent ortho-focused enhancements have been shared in the last several release updates, the baseline orthodontic functionality in CMP includes the ability to create and manage contracts, review the patient's clinical / treatment status, and create, manage, and track a patient's course of treatment.

## Ortho Contracts

For patients seeking orthodontic treatment, you can create a financial contract [Patient Tab > Financials > Contracts] to define the key terms of the proposed treatment. Start with the description, provider, location, start date, estimated months of treatment, and the overall fee. Once the key details are defined, use the interface to generate the charge schedule for the responsible party. By default, the patient's guarantor (self or otherwise) is assigned the contract total. The charge schedule is calculated automatically based on the downpayment amount and billing details you enter. Use the interface to modify this as needed. When insurance is applied to the contract, you can create a separate charge schedule for the anticipated coverage. As this schedule is calculated, the guarantor's schedule is recalculated accordingly.

The screenshot shows the Carestream Dental software interface. The browser address bar indicates the URL: `cmpdemo.cs dental.com/patient/financials-orthoContracts/50deda38-8869- ea11-a94c-000d3a102cd5`. The user is logged in as J. Foster at 01:30 pm. The patient's name is Steve Rogers, 33 years old, with phone number (678) 955-1212. The 'Contracts' page is active, showing a summary for a contract for Steve Rogers. The contract details are as follows:

Description	Full Tx (Pending)	Last Charge	N/A
Net Amount	\$5,500.00	Next Due	N/A
Proposed Start Date	06/10/2020		

**Contract Summary**

Description	Full Tx	Provider	Audrey Doyle
Location	Smiley Orthodontics	Contract Fee	\$5,500.00
Proposed Start Date	06/10/2020	Discount Amount	\$0.00
Est. Months of Tx	12	Discount Type	Select Discount Type
Est. Completion Date	06/10/2021	Contract Total	\$5,500.00
CDT for Initial Billing	D8080 comprehensive or		

At the bottom of the form, there are two buttons: 'Save Contract' and 'Cancel'.

**Contracts**  
for Steve Rogers

Description: Full Tx (Pending)  
Net Amount: \$5,500.00  
Proposed Start Date: 06/10/2020

Last Charge: N/A  
Next Due: N/A

**Contract Charge Schedules**

Guarantor: Steve Rogers  
Amount: \$5,500.00  
Frequency: Monthly  
Bill Day: 10th

Downpayment Amount: \$1,025.00  
Charge Amount: \$315.63  
# of Charges: 15

Buttons: Save Contract, Cancel

Once saved, the contract is placed in a Pending state which can be edited, activated, or cancelled. You can also print a 'Truth in Lending' disclosure statement, which can then be scanned and uploaded back into Patient Files. Once activated, the initial contract charges are posted to the Patient Ledger, which now tracks both the total (overall) balance and the current balance. Periodic contract charges are automatically posted to the ledger, updating the patient's balance based on the contract's schedule. NOTE: An activated contract cannot be cancelled but must be closed. You are prompted to choose how to handle the remaining balance.

**Ledger**  
for Anthony Stark

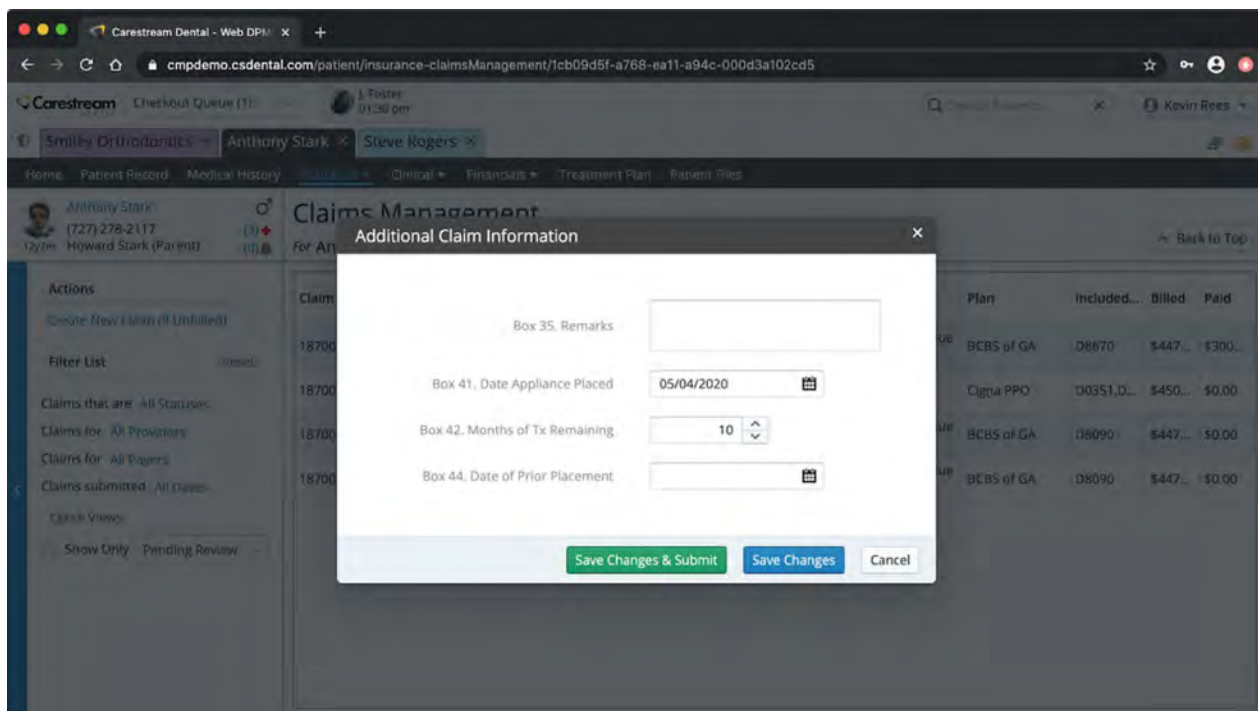
Last Payment: N/A  
Last Statement: \$7,686.67 (May 22, 2020)  
Next Appointment: Oct 15, 2020

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$2,582.93	\$3,903.74	\$6,486.67	\$174.00	\$453.13	\$1,919.13	\$36.67	\$0.00	\$6,486.67

⚠️ Aged Balance Exists

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
06/29/2020	06/29/2020	D8696	(UA) repair of orthodontic appliance - maxillary	\$200.00	\$3,405.80	\$7,736.67
06/04/2020	06/04/2020	Contract Charge	Phase 2	\$0.00	\$3,205.80	\$7,536.67
06/01/2020	06/01/2020	Contract Charge	Phase 2	\$0.00	\$3,130.80	\$7,536.67
05/29/2020	05/29/2020	Credit Card	Payment Credit Card - 125436	-\$150.00	\$2,952.67	\$7,536.67
05/22/2020	05/22/2020	Contract Downpayment	Phase 2	\$0.00	\$3,102.67	\$7,686.67
05/22/2020	05/22/2020	Contract Downpayment	Phase 2	\$0.00	\$2,769.67	\$7,686.67
05/22/2020	05/22/2020	Contract Downpayment	Phase 2	\$0.00	\$2,436.67	\$7,686.67
05/22/2020	05/22/2020	D8080	comprehensive orthodontic treatment of the adolescent dentition	\$6,250.00	\$1,436.67	\$7,686.67

When you activate a contract that includes an insurance plan, an initial insurance claim is created automatically. All orthodontic claims default to a status of 'Needs Info' upon generation. This provides the opportunity to review the claim and define additional details, such as the date of appliance placement and months of treatment, prior to submission [Patient Tab > Insurance > Claims Management]. Once these additional details are specified, the claim can be queued for submission to the clearinghouse. NOTE: As the treatment timeline progresses, continuation of treatment claims are automatically generated based on the contract schedule.



You can also review and manage contracts at the practice level in the Contracts screen [Location Tab > Financial > Contracts]. Using this new worklist, you can cancel pending contracts without having to go to each patient's record (e.g., filter status to 'Pending', select all, then click 'Cancel Pending Contracts'). Selecting a contract enables you to take actions such as reviewing the terms, generating a statement, or posting a balance adjustment. You can also print (.PDF) or export (.CSV) the current list of contracts to facilitate additional contract management workflows.

Contracts

Filtered by All Statuses, All Providers, All Production Values, All Dates

Contract Total	Unbilled Total	Total Contracts	Active Contracts	Pending Contracts
\$125,080.00	\$71,563.00	24	8	8

Patient Name	Description	Created On	Start Date	Active Date	Last Bill Date	Contract T...	Unbilled
Leo Galletto	Dad	07/24/2020	07/24/2020	Pending		\$4,800.00	\$4,800.00
Anthony Stark	Clear Correct ReTreat	07/24/2020	07/24/2020	Pending		\$6,000.00	\$6,000.00
Caroline Thomas	Phase I	07/10/2020	07/10/2020	07/10/2020		\$6,500.00	\$5,850.00
Natalie Black	Phase i	07/10/2020	07/10/2020	07/10/2020		\$5,000.00	\$3,750.00
Steve Rogers	Clear Correct	06/25/2020	06/25/2020	Pending		\$6,000.00	\$6,000.00
Colt Pinsak	Full Tx	06/11/2020	06/11/2020	06/11/2020		\$5,130.00	\$3,740.00
Steve Rogers	Full Tx	06/10/2020	06/10/2020	Pending		\$5,500.00	\$5,500.00
Tom Hiddleston	phase 1	06/08/2020	06/08/2020	Pending		\$1,000.00	\$1,000.00
Anne Sullivan	Comprehensive Ortho	05/28/2020	05/28/2020	05/28/2020		\$5,000.00	\$3,600.00

## Orthodontic Clinical Summary

CMP's baseline orthodontic functionality also includes a clinical overview [Patient Tab > Clinical > Orthodontic Clinical Summary]. The 'Orthodontic Clinical Summary' provides clinical staff with a central area for reviewing and managing a patient's treatment details. The banner provides general details such as the patient's treatment status, referral source, and general dentist. The side panel provides a detailed history of clinical events and notes that occurred during an appointment, mimicking the Hard Tissue Chart. The main screen provides details on the latest clinical events (appointment details and clinical notes), today's scheduled appointment, and the next scheduled appointment.

**Carestream Dental - Web DPU**

Checkout Queue (1): J. Foster 01:30 pm

Search Patients: Kevin Rees

Smiley Orthodontics + Anthony Stark x Steve Rogers x

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

**Anthony Stark**  
 (727) 278-2117  
 Howard Stark (Parent)

DOB: 01/01/2008  
 Location: Smiley Orthodontics  
 Pref Dr: Audrey Doyle

Tx Status: Observation (since 01/04/2020)  
 Model Box: 0320002  
 Current Tx: Clear Correct

Referral: Referral Type: Dentist  
 School: ...

Connections: Anthony Stark (Stepsibling), Anthony Stark (Unknown), Anthony Stark (Unknown)

**Actions**  
 End Current Treatment  
 Schedule an Appointment  
 Acquire New Image

Search Code, Anatomy

08/06/2020  
 0 notes, 0 events, 1 appointment  
 Add Note Add Template

07/24/2020  
 2 notes, 1 event  
 Add Note Add Template

Oral hygiene instructions given  
 Note Updated By Kevin Rees at Smiley Orthodontics at 01:10 pm

Indirect bonding Lower Arch  
 Note Created By Audrey Doyle at Smiley Orthodontics at 10:52 am

Oral Hygiene Scored: 5

**Last Clinical Event - 07/24/2020**  
 Oral hygiene instructions given  
 Note Updated By Kevin Rees at 01:10 pm  
 indirect bonding Lower Arch  
 Note Created By Audrey Doyle at 10:52 am

**Today's Appointment - Audrey Doyle**  
 OH ☆☆☆☆☆  
 Chair 1 at 01:00 pm  
 Adj Short

Manage Appointment

**Next Appointment - 10/15/2020 - Audrey Doyle**  
 Chair 2 at 03:00 pm  
 Deband - D8680

**Aligner Tracking**  
 Manage

Upper Arch  
 Start Date: 06/16/2020  
 Expected Tray: 8 of 25 (as of 08/04/2020)  
 Last Delivery: 1 to 25  
 Change Every: 1 week

Lower Arch  
 Start Date: 06/16/2020  
 Expected Tray: 8 of 25 (as of 08/04/2020)  
 Last Delivery: 1 to 25  
 Change Every: 1 week

**Patient Notes**  
 Edit Notes  
 patient came in with poor OH

**Images**  
 View Images

**Carestream Dental - Web DPU**

Checkout Queue (1): J. Foster 01:30 pm

Search Patients: Kevin Rees

Smiley Orthodontics + Anthony Stark x Steve Rogers x

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

**Steve Rogers**  
 (678) 955-1212  
 (Self)

DOB: 03/03/1987  
 Location: Smiley Orthodontics  
 Pref Dr: Audrey Doyle

Tx Status: Observation (since 01/04/2020)  
 Model Box: 0320004  
 Current Tx: Innovation

Referral: Referral Type: Professional  
 School: Liberty Elementary Sc...

Connections: Anthony Stark (Stepsibling), Jeanine Potts (Spouse)

**Actions**  
 End Current Treatment  
 Schedule an Appointment  
 Acquire New Image

Search Code, Anatomy

08/06/2020  
 0 notes, 0 events, 1 appointment  
 Add Note Add Template

07/31/2020  
 1 note, 1 event

07/17/2020  
 0 notes, 0 events, 1 appointment

06/25/2020  
 1 note, 1 event

06/10/2020  
 0 notes, 1 event

**Last Clinical Event - 07/31/2020**  
 steel tie upper 3-3  
 Note Created By Audrey Doyle at 01:09 pm

**Today's Appointment - Audrey Doyle**  
 OH ☆☆☆☆☆  
 Chair 2 at 01:00 pm  
 Check

Manage Appointment

**Next Appointment - 08/22/2020 - Audrey Doyle**  
 Chair 1 at 02:45 pm  
 Adj Short

**Mechanics Tracking**

Upper AW	17 x 25	8 weeks
Lower AW	17 x 25	8 weeks
Appliances	Hyrax	10 weeks
Elastics		
Brackets		

**Patient Notes**  
 Add Notes  
 No patient notes

**Images**  
 View Images

The details of the current day's appointment can be managed within the 'Orthodontic Clinical Summary'. Click on 'Manage Appointment' to add or update any appointment details, complete procedures, and send to checkout. An oral hygiene rating can be assigned by selecting the appropriate 'star' level, which is then tracked in the patient's appointment history in the side panel. NOTE: When the patient does not have a scheduled appointment today, you can add progress notes in the patient's clinical history by entering them in the textbox or via the side panel.

### Last Clinical Event - 07/24/2020

OH 5 ★

Oral hygiene instructions given

Note Updated By Kevin Rees at 01:10 pm

indirect bonding Lower Arch

Note Created By Audrey Doyle at 10:52 am

### Today's Appointment - Audrey Doyle

OH ☆☆☆☆☆

Chair 1 at 01:00 pm

ADJ Short



[Manage Appointment](#)

### Next Appointment - 10/15/2020 - Audrey Doyle

Chair 2 at 03:00 pm

Deband - D8680

[Edit](#)

The latest clinical images are displayed as thumbnails, providing quick access to recently acquired radiographs or photos. Images can be pinned to this list by clicking on the 'star', ensuring they are always in view.

## Patient Treatment Tracking

Use the 'Orthodontic Clinical Summary' to initiate a patient's orthodontic treatment, and to record and track the treatment's progress. Click 'Begin New Treatment' to get started. Enter the start date, estimated months of treatment, and the modality: [traditional] mechanics or aligners. Once the treatment is defined, a 'progress tracker' is displayed in the banner to monitor the patient's progress against the proposed treatment timeline. A summary of the current state is also displayed in the upper right portion of the screen, reflecting the selected modality.

## Aligner Tracking

[Manage](#)

Upper Arch	Start Date	06/16/2020
	Expected Tray	8 of 25 (as of 08/04/2020)
	Last Delivery	1 to 25
	Change Every	1 week

Lower Arch	Start Date	06/16/2020
	Expected Tray	8 of 25 (as of 08/04/2020)
	Last Delivery	1 to 25
	Change Every	1 week

## Mechanics Tracking

Upper AW	17 x 25	8 weeks
Lower AW	17 x 25	8 weeks
Appliances	Hyrax	10 weeks
Elastics		
Brackets		

For patients with traditional braces, the mechanics can be defined and managed by clicking any of the hyperlinks in the 'Mechanics Tracking' module (e.g., Upper AW). You will be redirected to the 'Mechanics Tracking' screen, where you can define the patient's current mechanics, including archwires, brackets, elastics, and appliances [Patient Tab > Clinical > Mechanics Tracking]. Here, you can select a value from the list to add as the patient's current mechanics state. You can also create new mechanics to add to each global list, which can then be selected for other patients. The start date and duration of the current mechanics are tracked. You can also plan the series of future mechanics, activating them as current when changes are made during periodic appointments.



The screenshot shows the 'Mechanics Tracking - Archwires' interface. On the left, there is a sidebar with 'Actions' (Return to Clinical Summary), 'Filter List' (Reset), and 'Mechanics Type' (Archwires). The main area has a search bar 'Search to add Upper AW' and a table of archwires:

Description	Start Date	Duration	Actions
.014 niti			
.016 niti			
.018 niti	06/10/2020	8 weeks	Complete
17 x 25			

Below this is a section for 'Search to add Lower AW' and a 'History' tab with 'Current' and 'Planned' sub-tabs. The 'Current' history table is:

Description	Start Date	Duration	Actions
17 x 25	06/10/2020	8 weeks	Complete


The screenshot shows the 'Mechanics Tracking - Elastics' interface with an 'Add Elastic' dialog box open. The dialog contains the following fields:

- Elastic Type:** cl 2 1/4 4 oz
- Usage:** Day Night Both
- Teeth:** 6 > 30 < +

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

For those patients using clear aligners, a similar mechanism is available to track and update the patient's treatment [Patient Tab > Clinical > Aligner Tracking]. Click 'Manage' to access the 'Aligner Tracking' screen, where you can create an aligner plan. Specify the brand, start date, number of planned aligners, as well as the change intervals and usage rules. Once the plan is defined, you can use this screen to update the expected or last verified tray. Select 'Manage Aligner Plan' any time you need to refine the details, or update the plan with the latest tray delivery. Once updated, the latest status is displayed in the 'Orthodontic Clinical Summary'.

[0.1.5202 RELEASE UPDATES CONTINUED ON PART 2]

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