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MOD kevin_moloney

Moderator



09-16-2020 09:34 AM

Sensei Cloud Release 0.1.5336 (Part 2)

Sensei Cloud

Weekly Release

Build 0.1.5336 | September 16th, 2020

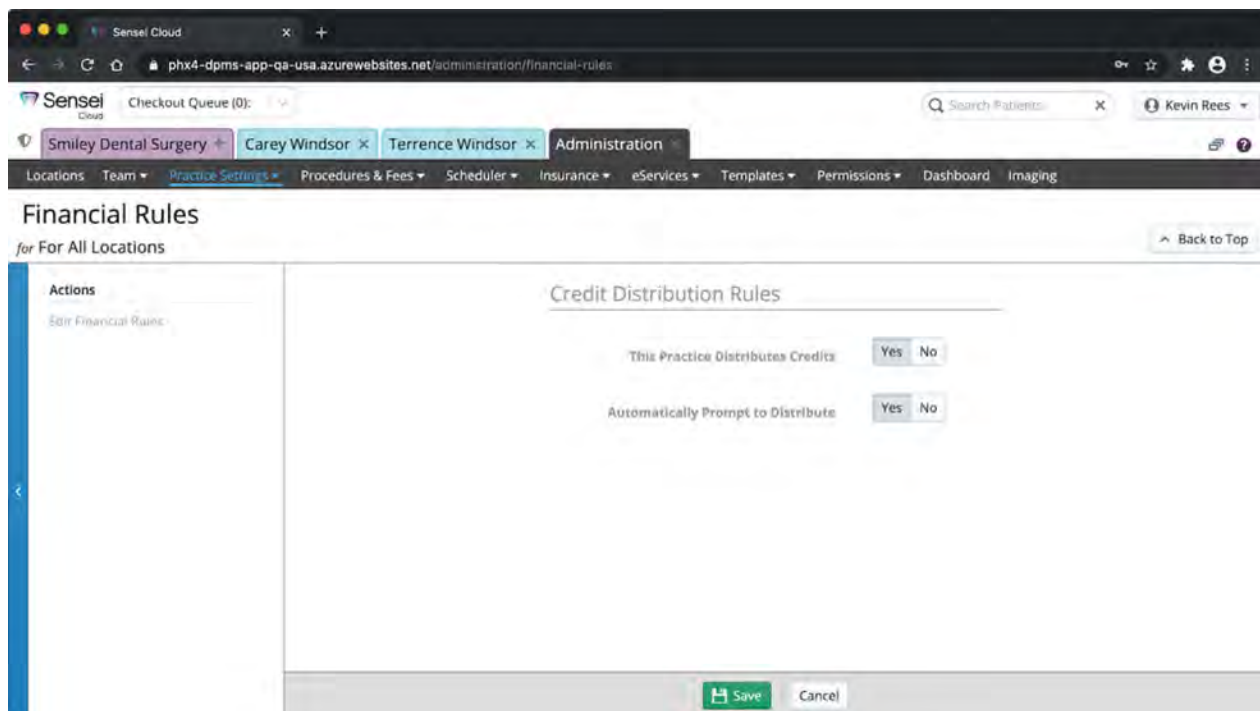
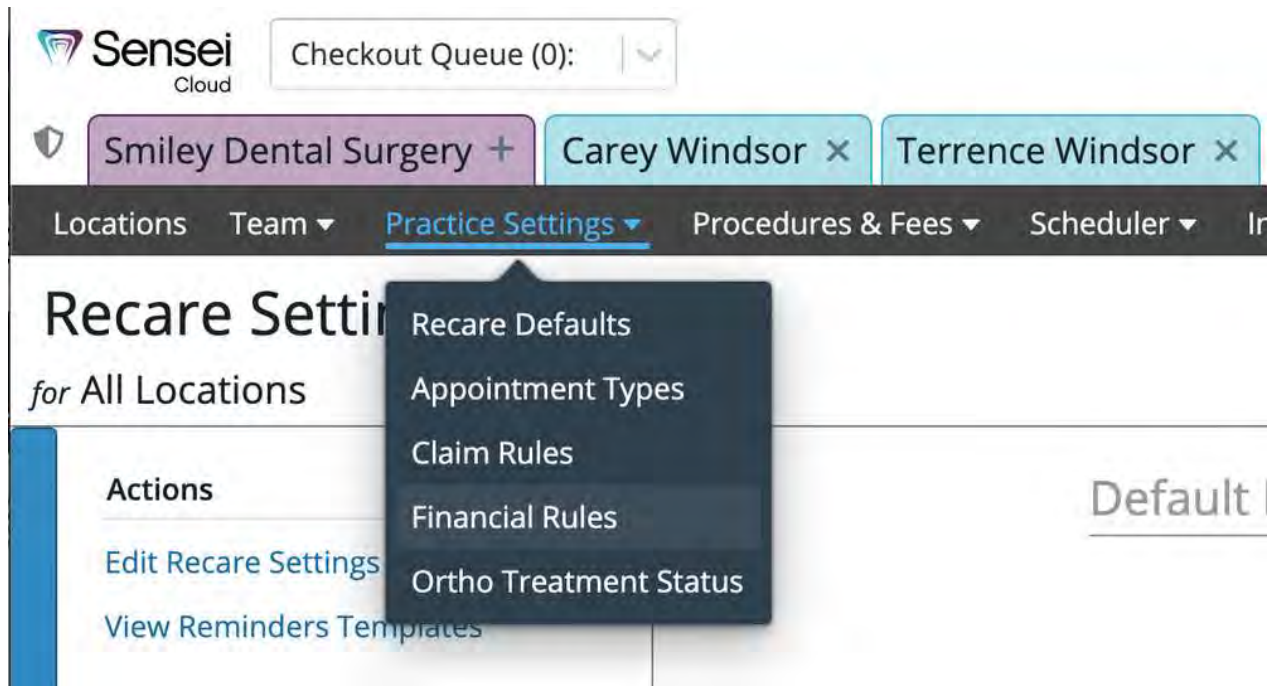
This week's Sensei Cloud updates continue to expand core application functionality and deliver on recent customer requests.

[0.1.5336 RELEASE UPDATES CONTINUED FROM PART 1]

Applied Payments

For practices that pay their providers based on collections, Sensei Cloud now supports the ability to apply the funds from posted credits (e.g., payments, discounts, and write-offs) to open debits (e.g., charges). Distributions - the application of credits to debits - link collected money to a provider's work,

enabling you to report on the collection activities associated with each provider. A new setting enables you to specify whether your practice applies credits. Selecting 'Yes' enables access to the Applied Payments functionality within Sensei Cloud [Administration Tab > Practice Settings > Financial Rules]. This includes the controls that enable you to distribute credits to debits, as well as the 'Applied Payments' reporting screen. NOTE: This setting is turned off by default unless your practice has already been applying payments directly to providers as "provider payments" (now known as "pre-payments").



An additional setting can be enabled to automatically prompt team members to distribute credits. When selected, team members are prompted to distribute a credit's funds to open charges whenever the transaction is posted. Whether automatically prompted or manually executed, your team now has the ability to specify which providers are credited with posted collections. NOTE: The distribution controls are available via the transaction details of credits on the Patient Ledger [Patient Tab > Financials > Ledger], Financial Daysheet [Location Tab > Financial > Daysheet], and Applied Payments [Location Tab > Financial > Applied Payments] screens.

The screenshot displays the 'Ledger' for Terrence Molnator. At the top, it shows the current balance as -\$77.42, with a 'Paid in Full' indicator. A summary table provides a breakdown of balances by age group (0-30, 31-60, 61-90, 91+ days) and insurance due amounts. Below this is a table of transactions with columns for date, code, description, amount, current balance, and total. A specific transaction on 07/23/2020 for a credit card payment of \$300.00 is highlighted. To the left of this transaction is a green checkmark icon, indicating it is eligible for distribution. Below the main table, a 'Payment Details' section provides further information about the credit card payment, including the location (Smiley Dental Surgery), amount (\$300.00), and the amount already applied (\$181.00). At the bottom, a list of other transactions is visible, including write-offs and payment adjustments, each with a red exclamation mark icon indicating they require attention.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
09/01/2020	09/01/2020	Insurance	Payment Insurance - Claim #: 114000000000045P	-\$200.00	-\$77.42	-\$77.42
07/23/2020	07/23/2020	Credit Card	Payment Credit Card	-\$75.00	\$122.58	\$122.58
07/23/2020	07/23/2020	Credit Card	Payment Credit Card	-\$300.00	\$197.58	\$197.58

There are visual indicators to the left of each transaction that indicate whether some action is needed, such as a credit that has available funds to distribute or a debit that has not been fully paid. Use the 'Apply This {Credit}' hyperlink to access the 'Apply Credit' dialog, where you can manage the distribution of the credit's funds to open charges. Details on the credit's funds available to distribute are displayed in the 'Credit' section, and are updated automatically as you manage its distributions. By default, any debits (charges) on the patient's account that are not already fully covered by existing distributions are presented in the 'Charges' list. To distribute the funds, click the checkbox to the right of the charge and specify the amount of the distribution. By default, when distributing the funds of an insurance payment, the available charges are

limited to those for the associated claim. NOTE: You cannot overdistribute the credit's total funds (e.g., apply more than is available) or overdistribute to a debit (e.g., apply more money than is needed to cover the charge).

Distribute this payment against completed procedures. Select procedures below and specify amounts to distribute against each procedure. Note: You cannot over-distribute the payment. Any previous distributions to providers (pre-payments) or procedures must be adjusted to free up money to distribute against other procedures.

Credit

Description	Date	Comment/Reference	Amount	Already Ap...	Remaining To Apply
Payment Credit Card	07/23/2020		\$300.00	\$181.00	\$119.00

No pre-payment distributions exist for this credit

Charges

Description	Svc Date	Provider	Ins Claim Ref	Amount	Other P...	Apply
D0272 - bitewings - two radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000043P	\$58.00	\$0.00	\$17.00
D0220 - intraoral - periapical first radiographic image	08/06/20...	Dr. Jason Parker	1140000000000044P	\$36.00	\$0.00	\$14.00
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00

Summary Table:

91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$0.00	\$0.00	-\$77.42
Amount	Current	Total
	-\$300.00	\$197.58
		\$197.58

Charges Summary:

Amount	Already Applied	To be Applied
\$300.00	\$0.00	\$300.00

Charges Summary Table:

Amount	Current	Total
-\$1,000.00	\$497.58	\$497.58
-\$7,500.00	\$1,497.58	\$1,497.58
\$150.00	\$8,997.58	\$8,997.58
\$600.00	\$8,847.58	\$8,847.58
\$1,456.00	\$8,247.58	\$8,247.58
\$150.00	\$6,791.58	\$6,791.58
-\$108.66	\$6,641.58	\$6,641.58
-\$726.42	\$6,750.24	\$6,750.24

Distribute this payment against completed procedures. Select procedures below and specify amounts to distribute against each procedure. Note: You cannot over-distribute the payment. Any previous distributions to providers (pre-payments) or procedures must be adjusted to free up money to distribute against other procedures.

Credit

Description	Date	Comment/Reference	Amount	Already Ap...	Remaining To Apply
Payment Insurance - Claim #: 1140000000000045P	09/01/2020		\$200.00	\$200.00	\$0.00

No pre-payment distributions exist for this credit

Charges

Claim Number: Select an insurance claim (no claim)

Description	Svc Date	Provider	Ins Claim Ref	Amount	Other P...	Apply
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$0.00	\$100.00
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$0.00	\$100.00

Summary Table:

91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$0.00	\$0.00	-\$77.42
Amount	Current	Total
	-\$200.00	-\$77.42
		-\$77.42

Charges Summary:

Amount	Already Applied	To be Applied
\$200.00	\$0.00	\$200.00

Charges Summary Table:

Amount	Current	Total
-\$75.00	\$122.58	\$122.58
-\$300.00	\$197.58	\$197.58
-\$1,000.00	\$497.58	\$497.58
-\$7,500.00	\$1,497.58	\$1,497.58
\$150.00	\$8,997.58	\$8,997.58
\$600.00	\$8,847.58	\$8,847.58

Any distributions that have already been made to the charge from other credits are accounted for in the 'Other Payments' column. Any existing distributions made towards the charge from the selected credit will be displayed in the 'Applied' column. You can adjust the credit's distributions at any time, adding distributions for new charges or changing existing distributions. Sensei Cloud keeps track of it all, logging new distribution records as needed. For example,

if a \$30 distribution was made to a charge last month, but then removed and the credit's funds were distributed to a different charge this month, then an offsetting -\$30 distribution is logged for this month (for the original charge) and a new \$30 distribution is made for the new charge. This ensures that the applied payments reporting for a time period is accurate and credits are not double counted. When you are finished managing the credit's distributions, click 'Save' to log the credit's new distribution records.

The screenshot shows the 'View Distribution Detail' window in the Sensei Cloud software. The window title is 'View Distribution Detail' and it contains the following information:

This screen shows the distributions made from this credit.

Credit Summary:

Patient	Description	Trans Date	Amount	Unapplied	Applied This Period	Applied Other Periods
Payment Credit Card		07/23/2020	\$75.00	\$0.00	\$75.00	\$0.00

Distributions Table:

Description	Svc Date	Provider	Distr By	Distr Date	Distr Amt
D0220 - intraoral - periapical first radiographic image	08/20/2019	Dr. Kevin Rees	Dr. Kevin Rees	09/01/2020	\$36.00
D0230 - intraoral - periapical each additional radiographic image	08/20/2019	Dr. Kevin Rees	Dr. Kevin Rees	09/01/2020	\$31.00
Pre-Payment for Svcs	09/11/2020	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	\$8.00
Pre-Payment for Svcs	09/11/2020	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	-\$8.00
D9215 - local anesthesia in conjunction with operative or surgical procedures	08/06/2019	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	\$8.00

Summary Table (Right Side):

Category	Current	Total
Patient Due		-\$77.42
Current	\$122.58	\$122.58
D	\$197.58	\$197.58
D	\$497.58	\$497.58
D	\$1,497.58	\$1,497.58
D	\$8,997.58	\$8,997.58
D	\$600.00	\$8,847.58
D	\$1,456.00	\$8,247.58
D	\$150.00	\$6,791.58
D	-\$108.66	\$6,641.58

Certain types of credits can also be applied as “pre-payments”. When money is collected up front, you can use pre-payments to credit providers before the treatment is completed. This helps if your payroll practices are based on when money comes in (collections), rather than when service is completed. When distributing credits as pre-payments, the distributions are made directly to providers instead of particular charges. Click ‘Apply as Pre-Payment’ to distribute the credit’s funds directly to providers. NOTE: Insurance payments and balance adjustments (e.g., discounts and write-offs) cannot be distributed as pre-payments, as these credits only become relevant once services have been rendered (e.g., treatment completed and charges posted).

The screenshot displays the 'Apply as Pre-Payment to Providers' window in Sensei Cloud. At the top, it instructs users to distribute the payment as a pre-payment directly to providers and notes that these distributions must be cleared before being distributed to actual work performed. Below this is a 'Provider Payments' table with columns for 'Provider' and 'Amount Paid'. The providers listed include Dr. Kevin Rees (\$86.00), Chris Spencer (\$0.00), Dr. Jason Parker (\$0.00), Dr. Jon Barnes (\$0.00), Desmond Miles (\$33.00), Dr. Muj Fletcher (\$0.00), and Mr. Mark King (\$0.00). A summary below the table shows: Payment Amount: \$300.00, Unapplied Amount: \$0.00, Already Distributed: \$181.00, and Applied as Pre-Payments: \$119.00. To the right, there is a 'Clear Existing Pre-Payments' button and a table showing the distribution of the \$300.00 credit among various providers, with a total of \$1,975.58.

Provider	Amount Paid
Dr. Kevin Rees	\$86.00
Chris Spencer	\$0.00
Dr. Jason Parker	\$0.00
Dr. Jon Barnes	\$0.00
Desmond Miles	\$33.00
Dr. Muj Fletcher	\$0.00
Mr. Mark King	\$0.00

Payment Amount: \$300.00 Unapplied Amount: \$0.00 Already Distributed: \$181.00 Applied as Pre-Payments: \$119.00

Amount	Current	Total
-\$300.00	\$197.58	\$197.58
\$300.00		
Applied as Pre-Payment		
View Distribution Detail		
\$181.00		
\$119.00		
-\$1,000.00	\$497.58	\$497.58
-\$7,500.00	\$1,497.58	\$1,497.58
or physician \$150.00	\$8,997.58	\$8,997.58
\$600.00	\$8,847.58	\$8,847.58
\$1,456.00	\$8,247.58	\$8,247.58
\$150.00	\$6,791.58	\$6,791.58
\$108.66	\$6,641.58	\$6,641.58
-\$226.42	\$6,750.24	\$6,750.24

When applying a credit as a pre-payment, all of your practice's providers are available to receive distributions. Define the 'Amount Paid' value for any providers being credited with pre-payments from the selected credit and click 'Save' to log the distribution records. A summary of the current distribution status is provided below the table of providers and is updated automatically as distributions are allocated. The 'Unapplied Amount' indicates how much money is available to distribute.

Pre-payment distributions can be modified at any time, with Sensei Cloud keeping track of all the changes over time. Whenever pre-payment distributions are removed or modified, new distribution records are created to keep track of where the money is going. A credit's pre-payments may often be replaced with distributions to specific charges once the services are performed. When applying a credit, any pre-payment distributions are displayed in the 'Apply Credit' dialog and can be quickly reviewed ('View Pre-Payments') or removed ('Clear Existing Pre-Payments') to free up those funds for distribution towards open charges. NOTE: Whenever performed, off-setting distribution records are made for the existing pre-payment distributions, ensuring that the credit isn't overdistributed and that providers won't get paid twice with the same money.

Sensei Cloud

cmprdemo.csidental.com/patient/financials/a0901bb8-4b7d-e711-80c2-000c3a127362

Checkout Queue (4): T. Robertson 02:00 pm, C. Hampton 01:43 pm, T. Duncan 02:00 pm, E. Flynn 01:30 pm

Smiley Dental Surgery - Terrence Molnator - Zizz Zizzerly - Administration - Dashboard

Terrence Molnator - Apply Payment

Distribute this payment against completed procedures. Select procedures below and specify amounts to distribute against each procedure. Note: You cannot over-distribute the payment. Any previous distributions to providers (pre-payments) or procedures must be adjusted to free up money to distribute against other procedures.

Credit

Description	Date	Comment/Reference	Amount	Already Ap...	Remaining To Apply
Payment Credit Card	07/23/2020		\$300.00	\$300.00	\$0.00

Pre-payments to the value of \$119.00 exist for this credit [View Pre-Payments](#) [Clear Existing Pre-Payments](#)

Charges

Description	Svc Date	Provider	Ins Claim Ref	Amount	Other P...	Apply
D9310 - consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician	08/20/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$0.00	\$50.00 <input type="checkbox"/>
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00 <input type="checkbox"/>
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00 <input type="checkbox"/>

Save Cancel

05/19/2020 05/19/2020 D9310 consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician \$150.00 \$6,791.58 \$6,791.58

05/14/2020 05/14/2020 Write-Off WRITE-OFF: Contracted Insurance -108.66 \$6,641.58 \$6,641.58

05/14/2020 05/14/2020 Write-Off WRITE-OFF: Contracted Insurance -\$226.42 \$6,750.24 \$6,750.24

Last Payment: N/A
Last Statement: \$8,532.58 (Jun 11, 2020)
Next Appointment: Not Scheduled [Back to Top](#)

91+ Days: \$0.00
Insurance Due (inc. write-offs): \$0.00
Patient Due: -\$77.42

Amount	Current	Total
\$300.00	\$197.58	\$197.58

Apply This Payment Apply as Pre-Payment View Distribution Detail

Amount	\$300.00
Already Applied	\$300.00
To be Applied	\$0.00

	-\$1,000.00	\$497.58	\$497.58
	-\$7,500.00	\$1,497.58	\$1,497.58
ian requesting dentist or physician	\$150.00	\$8,997.58	\$8,997.58
	\$600.00	\$8,847.58	\$8,847.58
	\$1,456.00	\$8,247.58	\$8,247.58
	\$150.00	\$6,791.58	\$6,791.58
	-\$108.66	\$6,641.58	\$6,641.58
	-\$226.42	\$6,750.24	\$6,750.24

Clear Existing Pre-Payments

This will remove any existing pre-payment distributions previously made directly to providers.

It will make these funds available to be distributed towards procedural charges or other debits.

It will also create reverse distributions to the providers during this time period to ensure that collections records are accurate as the providers were previously credited with this revenue.

The providers associated with any debits, such as completed work, will get credit for any new distributions that are made.

Ok

Cancel

1140000000000045P

\$150.00

\$100.00

\$50.00

Distribute this payment against completed procedures. Select procedures below and specify amounts to distribute against each procedure. Note: You cannot over-distribute the payment. Any previous distributions to providers (pre-payments) or procedures must be adjusted to free up money to distribute against other procedures.

Credit

Description	Date	Comment/Reference	Amount	Already Ap...	Remaining To Apply
Payment Credit Card	07/23/2020		\$300.00	\$300.00	\$0.00

No pre-payment distributions exist for this credit.

Charges

Description	Svc Date	Provider	Ins Claim Ref	Amount	Other P...	Apply
physician other than requesting dentist or physician	08/02/20...	Dr. Kevin Rees	1140000000000008P	\$150.00	\$0.00	
D0220 - intraoral - periapical first radiographic image	08/02/20...	Dr. Kevin Rees	1140000000000050P	\$36.00	\$0.00	\$36.00
D0230 - intraoral - periapical each additional radiographic image	08/02/20...	Dr. Kevin Rees	1140000000000050P	\$31.00	\$0.00	\$31.00
D9310 - consultation - diagnostic service provided by dentist or	08/16/20...	Dr. Kevin Rees	1140000000000051P	\$150.00	\$0.00	

Summary Table:

Amount	Current	Total
-\$300.00	\$197.58	\$197.58

Apply This Payment Summary:

Amount	Already Applied	To be Applied
\$300.00	\$300.00	\$0.00

Charges Summary Table:

Charge Description	Amount	Current	Total
physician other than requesting dentist or physician	\$150.00	\$8,997.58	\$8,997.58
D0220 - intraoral - periapical first radiographic image	\$36.00	\$8,847.58	\$8,847.58
D0230 - intraoral - periapical each additional radiographic image	\$31.00	\$8,247.58	\$8,247.58
D9310 - consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician	\$150.00	\$6,791.58	\$6,791.58
WRITE-OFF: Contracted Insurance	-\$108.66	\$6,641.58	\$6,641.58
WRITE-OFF: Contracted Insurance	-\$226.42	\$6,750.24	\$6,750.24

You can click 'View Distribution Detail' to review all the existing distributions made from the selected credit. This includes charges, pre-payments, and any off-setting corrections. The associated charge and/or provider and service date are provided for each distribution, as well as the team member that made the distribution, the date on which it happened, and its amount.

This screen shows the distributions made from this credit during the period from 09/01/2020 to 09/30/2020.

Credit

Patient	Description	Trans Date	Amount	Unapplied	Applied This Period	Applied Other Periods
Terrence Molnator	Payment Credit Card	07/23/2020	\$300.00	\$0.00	\$300.00	\$0.00

Distributions

Description	Svc Date	Provider	Distr By	Distr Date	Distr Amt
physician other than requesting dentist or physician	08/06/2019	Dr. Jason Parker	Dr. Kevin Rees	09/11/2020	\$14.00
Pre-Payment for Svcs	09/11/2020	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	\$86.00
Pre-Payment for Svcs	09/11/2020	Desmond Miles	Dr. Kevin Rees	09/11/2020	\$33.00
Pre-Payment for Svcs	09/11/2020	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	-\$86.00
Pre-Payment for Svcs	09/11/2020	Desmond Miles	Dr. Kevin Rees	09/11/2020	-\$33.00
D0220 - intraoral - periapical first radiographic image	08/02/2019	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	\$36.00
D0230 - intraoral - periapical each additional radiographic image	08/02/2019	Dr. Kevin Rees	Dr. Kevin Rees	09/11/2020	\$31.00
D0170 - panoramic radiographic evaluation					

Summary Table:

Net Pay to Providers	Amount
Net Pay to Providers	\$917.00

Applied Details (this period):

Dr. Kevin Rees	\$342.00
Includes Pre-Payment	
Dr. Kevin Rees	\$286.00
Dr. Jason Parker	\$14.00

Summary Table:

Dr. Kevin Rees	\$75.00
Dr. Kevin Rees	\$200.00

As previously mentioned, all distribution records are logged and available for reporting in the 'Applied Payments' screen [Location Tab > Financial > Applied Payments]. This screen enables you to report on all distribution activity that

occurred during a selected reporting period. The current data in view can be exported to .CSV format for use in third party applications or printed to .PDF for archival and distribution. By default, distributions made during the current month are displayed, including those made to all providers, from any credit type that was posted on any date.

The screenshot shows the 'Applied Payments' dashboard for Smiley Dental Surgery. The summary table indicates 4 payments with total credits of \$1,075.00, \$158.00 unapplied, and \$1,044.00 applied. A detailed table lists individual payments, including a \$300.00 credit card payment from 07/23/2020, which is highlighted with a blue border. A 'Payment Details' pop-up window is open for this payment, showing it was made by Kevin Rees at 10:43 am. The dashboard also includes a filter list on the left with options like 'Only Show Credits with Unapplied Funds' and 'Only Show Credits with Pre-Payments'.

# of Payments	Total Credits	Unapplied	Applied	Pre-Payments	Refunds	Reversals	Net Pay to Providers
4	\$1,075.00	\$158.00	\$1,044.00	\$250.00	\$0.00	-\$127.00	\$917.00

Patient	Location Name	Description	Trans Date	Amount	Unapplied	Net Applied Amount (this period)	Applied Details (this period)
Terrence Molarnator	Smiley Dental Surgery	Payment - Check	04/17/2020	\$500.00	\$158.00	\$342.00	Dr. Kevin Rees Includes Pre-Payment \$342.00
Terrence Molarnator	Smiley Dental Surgery	Payment - Credit Card	07/23/2020	\$300.00	\$0.00	\$300.00	Dr. Kevin Rees Dr. Jason Parker \$286.00 \$14.00
Terrence Molarnator	Smiley Dental Surgery	Payment - Credit Card	07/23/2020	\$75.00	\$0.00	\$75.00	Dr. Kevin Rees \$75.00
Terrence Molarnator	Smiley Dental Surgery	Payment - Insurance	09/01/2020	\$200.00	\$0.00	\$200.00	Dr. Kevin Rees \$200.00

Applied Payments data can be filtered to generate other useful views. Check the 'Only Show Credits with Unapplied Funds' option to highlight those credits that still have funds left to distribute, enabling you to ensure that all collections have been fully distributed. Check the 'Only Show Credits with Pre-Payments' option to highlight credits with associated pre-payment distributions, enabling you to review and possibly replace pre-payments with distributions towards charges now that the work has been performed. NOTE: Click on the '?' to display help text that explains the filter functions as well as the recommended filter settings for common activities, such as distributing credits with unapplied funds.

Sensei Cloud

cmpdemo.csidental.com/location/Financial/collectionsByProvider/c781c181-d271-e711-80c2-000d3a10acd

Checkout Queue (4): T. Robertson 02:00 pm, C. Hampton 01:45 pm, T. Duncan 02:00 pm, E. Flynn 01:30 pm

Smiley Dental Surgery | Terrence Molnarator | Zazz Zazzerly | Zizz Zizzerly | Administration | Dashboard

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

Smiley Dental Surgery

(285) 555-9923
5150 Wooded Glen Drive

Applied Payments

Filtered by All Providers, Distributed All Dates, Credits Entered All Dates

# of Payments	Total Credits	Unapplied	Applied	Pre-Payments	Refunds	Reversals	Net Pay to Providers
105	\$42,276.21	\$40,544.21	\$2,128.00	\$1,640.00	\$0.00	-\$396.00	\$1,732.00

Patient	Location Name	Description	Trans Date	Amount	Unapplied	Net Applied Amount (this period)	Applied Details (this period)
Adan Santiago	Smiley Dental Surgery	Payment - Debit Card	03/15/2018	\$120.00	\$120.00	\$0.00	
Alfredo Farmer	Smiley Dental Surgery	Payment - Insurance	10/28/2019	\$600.00	\$600.00	\$0.00	
Amy Reeves	Smiley Dental Surgery	Payment - Credit Card	09/26/2017	\$1,587.00	\$1,587.00	\$0.00	
Amy Reeves	Smiley Dental Surgery	Payment - Credit Card	04/04/2018	\$1,000.00	\$1,000.00	\$0.00	
Ari Schroeder	Smiley Dental Surgery	Payment - Debit Card	09/08/2017	\$444.00	\$444.00	\$0.00	
Ari Schroeder	Smiley Dental Surgery	Payment - Cash	09/08/2017	\$65.00	\$65.00	\$0.00	
Arron Bass	Smiley Dental Surgery	Payment - Debit Card	09/21/2017	\$96.00	\$96.00	\$0.00	
Beth Blake	Smiley Dental Surgery	Write-Off - Contracted Insurance	05/14/2020	\$211.87	\$211.87	\$0.00	
Brie Lane	Smiley Dental Surgery	Payment - Debit Card	09/20/2017	\$700.00	\$700.00	\$0.00	
Buddy Collier	Smiley Dental Surgery	Payment - Insurance	11/23/2016	\$910.00	\$910.00	\$0.00	
Calvin David	Smiley Dental Surgery	Payment - Debit	09/04/2016	\$150.00	\$150.00	\$0.00	

Sensei Cloud

cmpdemo.csidental.com/location/Financial/collectionsByProvider/c781c181-d271-e711-80c2-000d3a10acd

Checkout Queue (4): T. Robertson 02:00 pm, C. Hampton 01:45 pm, T. Duncan 02:00 pm, E. Flynn 01:30 pm

Smiley Dental Surgery | Terrence Molnarator | Zazz Zazzerly | Zizz Zizzerly | Administration | Dashboard

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

Smiley Dental Surgery

(285) 555-9923
5150 Wooded Glen Drive

Applied Payments Filters

Distributions made to {Providers} Select one or more providers to filter the transaction list to only display credits with distributions made to the selected provider(s). Default value is "All Providers".

Credits of Type {Types} Select one or more credit types (e.g., specific types of payments or balance adjustments) to filter the transaction list to only display credits of the selected type(s). Default value is "All Types". Note: When filtered, it will prompt you that some distributions may be filtered out when printing the Applied Payments Report.

Distributions Made {Date Range} Select a time period (e.g., this month, last month, or custom date range) to filter the transaction list to only display credits with distributions made during the selected date range. Default value is "This Month".

Credits Entered {Date Range} Select a time period (e.g., this month, last month, or custom date range) to filter the transaction list to only display credits that were posted during the selected date range. Default value is "All Dates". Note: When filtered, CMP will prompt you that some distributions may be filtered out when printing the Applied Payments Report.

Only Show Credits with Unapplied Funds When checked, will filter the transaction list to only display credits that are completely unapplied (e.g., no distributions applied).

Only Show Credits with Pre-Payments When checked, will filter the transaction list to only display credits that have pre-payment distributions (e.g., distributions directly to providers, not based on specific service charges).

Helpful Hints
When generating a report to support payroll activities (if paying employee based on collections), then you can set the 'Distributions Made' filter to "Last Month" or a custom date range of the previous two weeks. This will produce a report of all credit distributions made to providers during your payroll reporting period.
Filters set to: All Providers; All Types; [Distribution Period]; All Dates; Unchecked; Unchecked
If trying to identify those credits that have not yet been distributed to providers and/or services performed, then you can check the 'Only Show Credits with Unapplied Funds' filter or sort the report by the 'Unapplied Column' to locate credits that still have unapplied monies.
Filters set to: All Providers; All Types; All Dates; All Dates; Checked; Unchecked
If trying to clean up pre-payments made directly to providers to redistribute these funds now that the actual services have been rendered, then you can check the 'Only Show Credits with Pre-Payments' filter to identify those credits that contain pre-payment distributions.
Filters set to: All Providers; All Types; All Dates; All Dates; Unchecked; Checked

Patient	Location Name	Description	Trans Date	Amount	Unapplied	Net Applied Amount (this period)	Applied Details (this period)
Beth Blake	Smiley Dental Surgery	Write-Off - Contracted Insurance	05/14/2020	\$211.87	\$211.87	\$0.00	
Brie Lane	Smiley Dental Surgery	Payment - Debit Card	09/20/2017	\$700.00	\$700.00	\$0.00	
Buddy Collier	Smiley Dental Surgery	Payment - Insurance	11/23/2016	\$910.00	\$910.00	\$0.00	
Calvin David	Smiley Dental Surgery	Payment - Debit	09/04/2016	\$150.00	\$150.00	\$0.00	

IMPORTANT: Whenever the filters are set so that a credit's full distribution records aren't displayed (such as limiting the 'Distributions Made {Date}' or 'Distributions made to {Provider}' filters), you will not be able to manage its distributions. You must adjust the filters to display the credit's full distribution history before making changes via the Applied Payments UI. This ensures you are aware of all the credit's distributions before trying to make adjustments. You are also prompted when trying to print an Applied (or Unapplied) Payments report when filtered to a limited view of the credits' distribution activity.

We hope that this new reporting functionality supports the needs of practices that base their financial business functions on collections rather than production. We look forward to hearing feedback on how these enhancements support your financial workflows and what additional enhancements are needed. Additional enhancements are planned, including the ability to automatically distribute existing credits to unpaid debits to help clean up historic transactions as well as the ability to assign a logical rule to use when automatically distributed posted credits.

Optimizations and Fixes

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

1. Addressed a bug in which the visual indicator for a watch was removed when the 'Reset Tooth Graphic' function is used.
2. Fixed a defect in which the posting of a split payment via the ePayments Secure service would sometimes result in duplicate ledger entries.
3. Resolved an issue in which a policyholder's associated insurance plans would sometimes not be displayed when defining the insurance policy in the Patient Record.
4. Addressed a UI defect in which all of the involved teeth were not visible in the transaction details of the Treatment Plan UI for multi-tooth procedures, such as a partial denture.
5. Removed the ability to chart furcation on a single-rooted tooth when in Current charting mode on the Hard Tissue Chart UI.
6. Fixed a defect in which a newly created Patient Record would sometimes inherit the portrait (image) of the previously created Patient Record.
7. Addressed an issue in which the emergency contact setting for a patient's responsible parties was not maintained when the RP's relationship field is modified in the Patient Record.
8. Fixed a bug in which clinical event notes with an incorrect status were being created when procedures were deleted from a treatment plan.

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