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Sensei Cloud Release 0.1.5372

Sensei Cloud

Weekly Release

Build 0.1.5372 | September 25th, 2020

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

Patient Notes

In response to customer feedback, the Notes functionality has been expanded to provide easier access to non-clinical patient notes. The new Notes screen displays a consolidated view of patient notes, including notes entered when managing an appointment or posting financial transactions [Patient Tab > Notes]. NOTE: This excludes clinical event notes, which are still entered into and displayed on clinical workflow screens, such as the Hard Tissue Chart, Orthodontic Clinical Summary, or Treatment Plan.

The Notes list displays all existing (non-clinical) notes that have been added to the patient account. Currently, this includes:

- Notes added via the Appointment Card when managing an appointment;
- Notes entered when cancelling a scheduled appointment from the DayView;
- Contact notes added when managing appointments from a scheduled worklist, such as the Pending List;
- Comments added when posting a financial transaction to the Patient Ledger;
- Automatic system notes created when sending correspondence to a referral source via the Referral Follow-Up List;
- Automatic system notes created when sending recall reminders via the Recare List; and
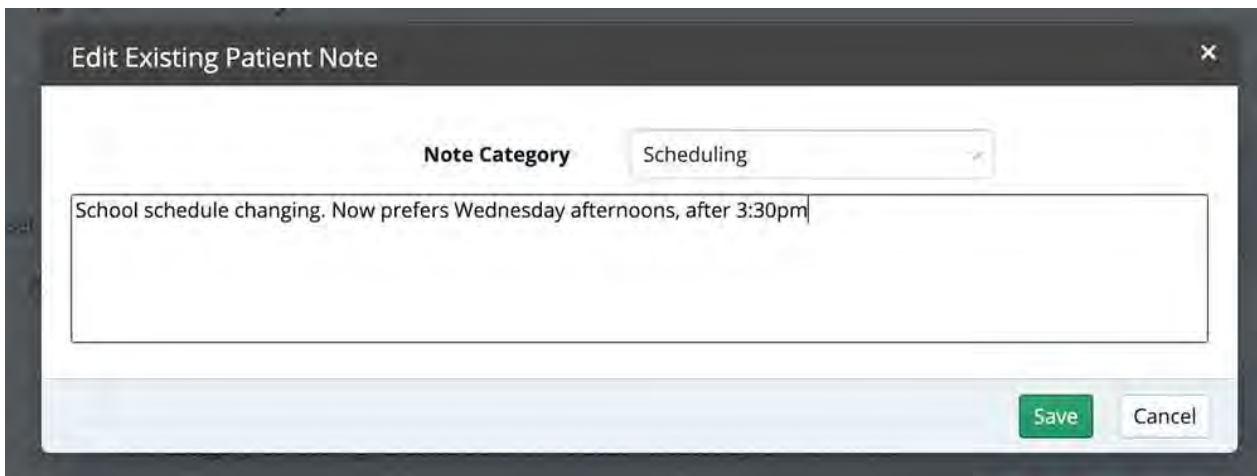- Text added to the 'Patient Notes' field in the Patient Record.

In addition, you can now easily add free text notes to a patient's account from the Patient Homepage, Patient Snapshot, or the new Notes list. Click 'Add Note', select a note category, and then enter your note text. Once saved, the note appears in the patient's Notes list. NOTE: 'General' is the default category, but alternate values can be used to help classify the type of note including, medical, financial, scheduling, and referral.
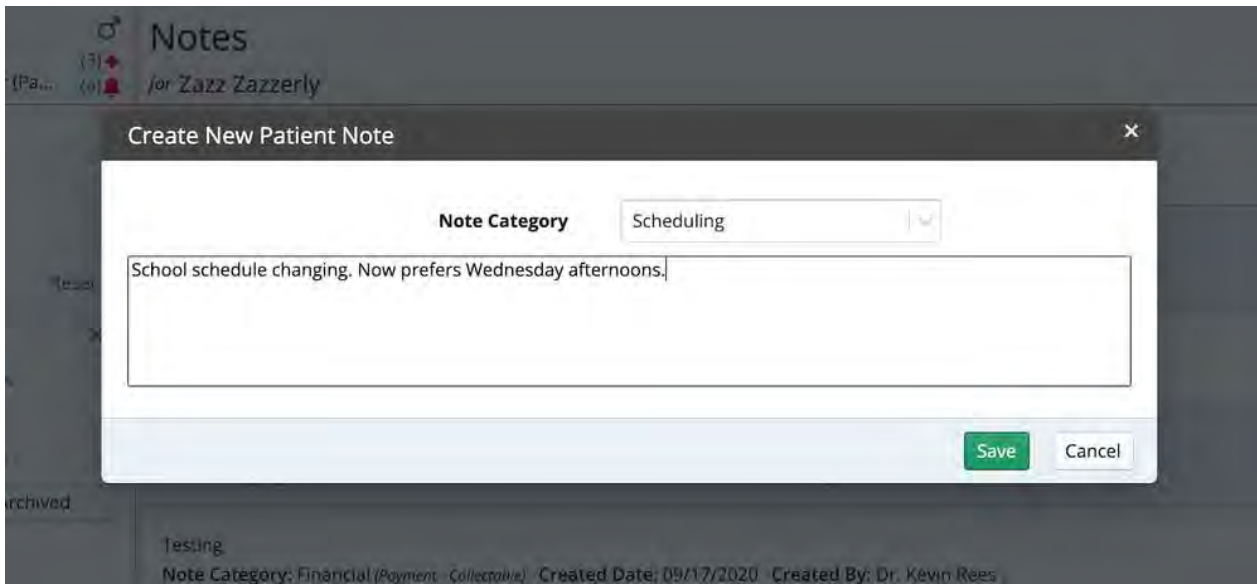
All existing notes have been automatically assigned a category, making it easy to identify and manage historic items within the Notes list. While you must assign a category to manually created free text notes, those created via other usage contexts (such as the Appointment Card) are automatically assigned a relevant category. From the new Notes screen, you can search for specific items based on note text, or filter the list by category, author, or date. You can also print the patient's notes, generating a .PDF of all patient notes currently in view.

To edit notes in the list, hover over the note and click on the 'pencil' button. The revision history is maintained and can be reviewed at any time. Manually entered notes can also be archived to hide them from the patient's main Notes list. NOTE: These actions do not apply to notes created through the various means listed above (e.g., notes entered in an Appointment Card or the Pending List).

Edit Existing Patient Note

Note Category: Scheduling

School schedule changing. Now prefers Wednesday afternoons, after 3:30pm

Save Cancel

Notes can also be reviewed from the Patient Snapshot [Patient MiniCard > Patient Snapshot > Notes] and the 'Notes & Contact History' module on the Patient Homepage [Patient Tab > Home]. An 'Add Note' control is available in both places, enabling you to quickly add a new free text note about the patient.
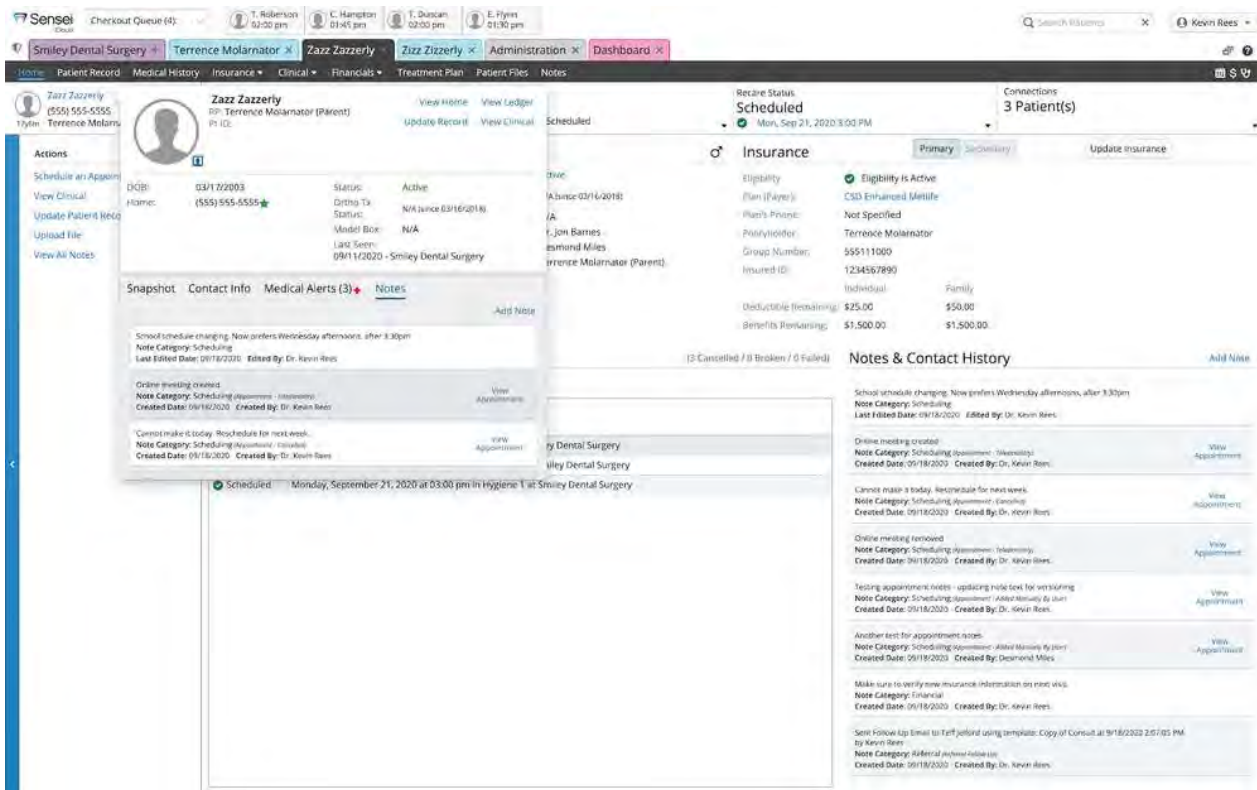
We hope that these enhancements improve your general patient documentation workflows. We look forward to hearing what works well for you and what additional enhancement might be needed.

Team Member Timecard Access

Non-administrative team members now have access to their own timecards, in response to customer input [Administration Tab > Team > Team Timecards]. Users without permission to manage timecards can access their read-only timecard by clicking on the User Menu > My Settings >Team > Team Timecards. These users can now view and filter their own timecard activity and print out their timecards. NOTE: The ability to resolve issues and add working hour overrides still requires administrative permissions.

We are happy to provide this requested enhancement to our users. We look forward to your feedback on what else can be done in support of your operations and payroll workflows.

Orthodontic Treatment Tracking

The Orthodontic Clinical Summary has been enhanced, based on customer feedback. This includes improvements to the Treatment Tracker module, which displays the timeline and progress of the patient's current [ortho] treatment [Patient Tab > Clinical > Orthodontic Clinical Summary]. The banner modules have been rearranged to accommodate the treatment tracker enhancements, and now also include the patient's preferred hygienist and date of last visit, for quick reference.

Whenever you have started new treatment for a patient ('Start New Treatment'), progress is displayed in the first banner module of the Orthodontic Clinical Summary. The start date is provided along with the estimated completion date, both defined when the treatment was started. The 'Tx Track' metric now displays the amount of time left in the current treatment, as well as the percentage of treatment completed. NOTE: Sensei Cloud displays time left in months by default, automatically adjusting to weeks and then days as the estimated completion date draws close.

While time progresses, the 'Tx Track' calculation automatically updates - reducing the amount of time remaining while increasing the percentage of treatment completed. By default the 'Tx Track' indicator is displayed in green. If, however, the current treatment is not completed / ended before the estimated completion date, the indicator turns red and starts to calculate the amount of overage time.

When you have ended the patient's current treatment via the Orthodontic Clinical Summary ('End Current Treatment'), the 'Tx Track' module displays the actual completion date. The difference between the actual completion date and the original estimated completion date is displayed for easy reference.

End Current Treatment

Treatment	Clear Aligners
Start Date	07/30/2020
Estimation Months of Tx	18
Estimation Completion Date	01/30/2022
Actual Completion Date	Today (09/18/2(📅

Save   Cancel

Previous Tx   Clear Aligners
Completed   09/18/2020
Tx Track   16 mos under

No History

We hope that these enhancements better support the clinical workflows of our orthodontic customers. We look forward to hearing what works well and what additional improvements can be made to the Orthodontic Clinical Summary.

Optimizations and Fixes

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

1. Fixed a bug in which the number of open treatment plan items displayed in the Patient Snapshot UI was not being calculated correctly.
2. Addressed a small UI defect in a few screens in which section headers had an extra horizontal rule applied.
3. Resolved some inconsistencies in the required field validation patterns used in the Block Booking Templates UI.
4. Fixed a small defect in which the 'Return to [Ortho] Clinical Summary' navigation link was not working when managing a patient's aligner tracking plan.

5. [UK ONLY] Resolved a UI defect in which some references to prescriptions-based functionality were present for UK-based customers.
6. Addressed a bug in which the anatomy details field validation was failing and generating an error for a subset of CDT codes.

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kmccall
CS Dental Employee

11-10-2020 05:54 PM

For more information, see How to Use Patient Notes (non-clinical), and How to Access Team Timecards.

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