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**MOD kevin\_moloney**

Moderator



10-20-2020 09:14 AM

Sensei Cloud Release 0.1.5437

# Sensei Cloud

Weekly Release

Build 0.1.5437 | October 20th, 2020

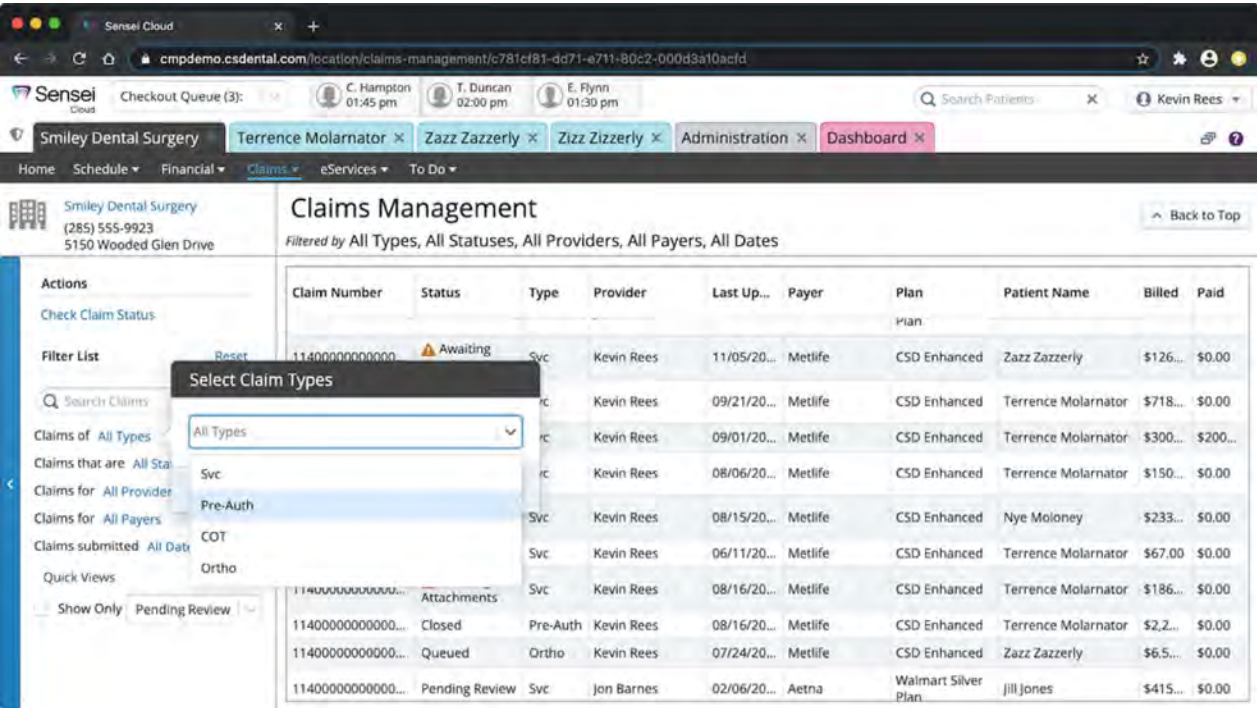
This week's Sensei Cloud updates continue to expand core application functionality and deliver on recent customer requests.

## Claims Management Enhancements

In response to customer feedback, the Claims Management workflow [Location Tab > Claims > Claims Management] now includes a 'claim type' designation to help categorize claim records. 'Type' is now a sortable column in the Claims Management list, as well as a filter option to use when searching for claims.

One of four Types is assigned automatically when a claim is generated:

- 'Svc' (standard statement of actual services);
- 'Pre-Auth' (request for pre-authorization of services);
- 'COT' (continuation of treatment claims for orthodontic services); or
- 'Ortho' (initial claim for orthodontic treatment).



You can also now search the Claims Management list for specific items based on patient name, policyholder, claim ID, or included procedure codes (e.g., CDT code and nomenclature). Along with the filtering tools, this enables you to quickly locate a specific claim record. In addition, some defects in the Claims Management table were addressed, enabling more effective sorting of the claims list by status, provider, and patient name.

The screenshot displays the 'Claims Management' section of the Sensei Cloud interface. It features a navigation menu on the left with options like 'Home', 'Schedule', 'Financial', 'Claims', 'eServices', and 'To Do'. The main content area shows a table of claims. One claim is selected, showing a 'Pre-authorization Claim Summary' for a patient named Terrence Molarnator. The summary includes details such as 'Created On: 07/22/2019', 'Status: Closed', and 'Pre-authorization #: 123456789'. Below this, a table lists CDT codes performed at Smiley Dental Surgery, with a total fee of \$831.00.

Claim Number	Status	Type	Provider	Last Up...	Payer	Plan	Patient Name	Billed	Paid
11400000000000...	Awaiting Attachments	Svc	Kevin Rees	05/13/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$427...	\$0.00
11400000000000...	Closed	Pre-Auth	Kevin Rees	07/22/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$831...	\$0.00

CDT Code	CDT Nomenclature	Tooth/Q...	Surface(s)	Provider	Service Date	Fee	Attach Req
D2960	labial veneer (resin laminate) - chairside	8		Kevin Rees	TBD	\$277.00	None

Lastly, Policyholder information has been added to the Claim Summary (displayed when clicking a claim), providing you with this information without having to open Claim Details. NOTE: All of these enhancements apply to both practice-level (Location Tab > Claims > Claims Management) and patient-level (Patient Tab > Insurance > Claims Management) Claims Management lists.

We are happy to provide these requested enhancements to our users. We look forward to your feedback on what else can be done in support of your claims management workflows.

## Patient Ledger Enhancements

The Patient Ledger and related workflows have been enhanced, based on customer feedback. Workflow 'speed bumps' have been added to prompt users to the presence of unposted charges when checking out an appointment or manually posting new charges. Additionally, you now have the ability to apply color coding to financial transaction types, making it easier for team members to identify specific transactions when reviewing a patient's ledger.

You are now prompted whenever checking out an appointment without first posting the charges associated with the completed work [Checkout Queue > Select Patient > 'Complete Check-Out']. This reminder is to prevent team members from accidentally checking out the patient without first realizing the revenue from today's appointment. NOTE: You can elect to defer posting the

day's charges, which results in adding the completed work to the patient's 'Unposted Procedures' list. This enables you to post the related charges at a later time.

The screenshot shows the Sensei Cloud interface for a patient named Carey Hampton. The top navigation bar includes 'Checkout Queue (3)', user avatars for C. Hampton, T. Duncan, and E. Flynn, and a search bar. The main content area displays a 'Checkout Queue' for Dr. Jason Parker at 01:45 pm. A sidebar on the left contains 'Actions' such as 'Check Claim Status', 'Filter List', and 'Print Documents'. The main table lists procedures with columns for Type, Provider, Last Up..., Payer, Plan, Patient Name, Billed, and Paid.

Type	Provider	Last Up...	Payer	Plan	Patient Name	Billed	Paid
Svc	Jon Barnes	03/03/20...	Cigna Healthcare	American Building Supplies	Mike Smith	\$392...	\$1,0...
Svc	Jon Barnes	01/17/20...	Aetna	Walmart Gold Plan	Kenneth Smith	\$415...	\$0.00
Svc	Kevin Rees	11/05/20...	Metlife	CSD Enhanced	Zazz Zazzerly	\$126...	\$0.00
Svc	Kevin Rees	09/21/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$718...	\$0.00
Svc	Kevin Rees	09/01/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$300...	\$200...
Svc	Kevin Rees	08/06/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$150...	\$0.00
Svc	Kevin Rees	08/15/20...	Metlife	CSD Enhanced	Nye Moloney	\$233...	\$0.00
Svc	Kevin Rees	06/11/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$67.00	\$0.00
Svc	Kevin Rees	08/16/20...	Metlife	CSD Enhanced	Terrence Molarnator	\$186...	\$0.00

The dialog box is titled 'Unposted Procedures Exist' and contains the following text:

**Warning:** There are completed work (procedures) from today that have not been posted as charges to the Patient Ledger. It is suggested that you post these completed procedures when checking out this appointment.

**Note:** You can always post the charges later through the Patient Ledger (Post Completed Work).

Would you like to review and post today's charges before completing check-out or proceed with checking out the appointment without posting charges?

At the bottom, there are two buttons: 'Post Today's Charges' (highlighted in blue) and 'Complete Check-Out'.

Similarly, you are also prompted whenever manually posting new charges to the Patient Ledger when 'Unposted Procedures' exist on the patient's account [Patient Tab > Financials > Ledger]. This reminder is to prevent team members from accidentally posting duplicate work that was already completed but not

yet posted. When prompted, you can elect to review the unposted procedures and select items to post as new charges. Moreover, you can always add new procedures manually on top of those already completed, whenever posting new charges. NOTE: A 'Post Completed Work' link in the Actions panel of the Patient Ledger indicates that the account has work that was completed, but not yet posted as charges.

**Ledger for Terrence Molarnator**

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$640.58	\$0.00	\$640.58	\$640.58	\$0.00	\$0.00	\$0.00	\$0.00	\$640.58

⚠ Balance Exists

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
09/21/2020	09/21/2020	D9999	unspecified adjunctive procedure, by report	\$265.00	\$640.58	\$640.58
09/21/2020	09/21/2020	D9945	(UA) occlusal guard - soft appliance, full arch	\$275.00	\$375.58	\$375.58
09/21/2020	09/21/2020	D9930	treatment of complications (post-surgical) - unusual circumstances, by report.	\$88.00	\$100.58	\$100.58
09/21/2020	09/21/2020	D0999	unspecified diagnostic procedure, by report	\$45.00	\$12.58	\$12.58
09/21/2020	09/21/2020	D0999	unspecified diagnostic procedure, by report	\$45.00	-\$32.42	-\$32.42
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
07/23/2020	07/23/2020	Write-Off	WRITE-OFF: Contracted Insurance	-\$1,000.00	\$497.58	\$497.58
07/23/2020	07/23/2020	Write-Off	WRITE-OFF: Contracted Insurance	-\$7,500.00	\$1,497.58	\$1,497.58

**Unposted Procedures Exist**

**Warning:** This patient has previously completed work (procedures) that were never posted as charges to the Patient Ledger. It is suggested that you review these completed, but unposted procedures to ensure that you are not completing or posting duplicate work.

Would you like to review these existing completed items or just post new charges?

[Review Existing](#) [Post New](#)

Lastly, with this release, you now have the option to apply color to financial transaction types and display this visual markup in the Patient Ledger [Administration Tab > Practice Settings > Financial Rules]. Select 'Yes' in the new 'Apply Color to Transaction Types' setting to determine which transaction types to visually highlight with color (and the colors to assign them). Once saved, the Patient Ledger displays the assigned colors for each (included) posted transaction. This makes it easier to identify specific transaction types of interest. NOTE: Default color values have been assigned to transaction types, making it easy to start taking advantage of this enhancement right away.

The screenshot shows the 'Financial Rules' configuration page in the Sensei Cloud administration interface. The page is titled 'Financial Rules' and is for 'All Locations'. The 'Apply Color to Transaction Types' setting is set to 'Yes'. A table lists the transaction types and their assigned colors:

Apply	Transaction Type	Color
<input checked="" type="checkbox"/>	Charges	Blue
<input checked="" type="checkbox"/>	Contract Charges	Blue
<input checked="" type="checkbox"/>	Charge Adjustments	Light Blue
<input checked="" type="checkbox"/>	Payments	Green
<input checked="" type="checkbox"/>	Automatic Payments	Green

A tooltip explains the setting: 'Check this box to define and apply a color scheme to financial transaction types that can be used to help distinguish items in the Patient Ledger and related screens. Note: This setting will apply to all users in your practice.'

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$640.58	\$0.00	\$640.58	\$640.58	\$0.00	\$0.00	\$0.00	\$0.00	\$640.58

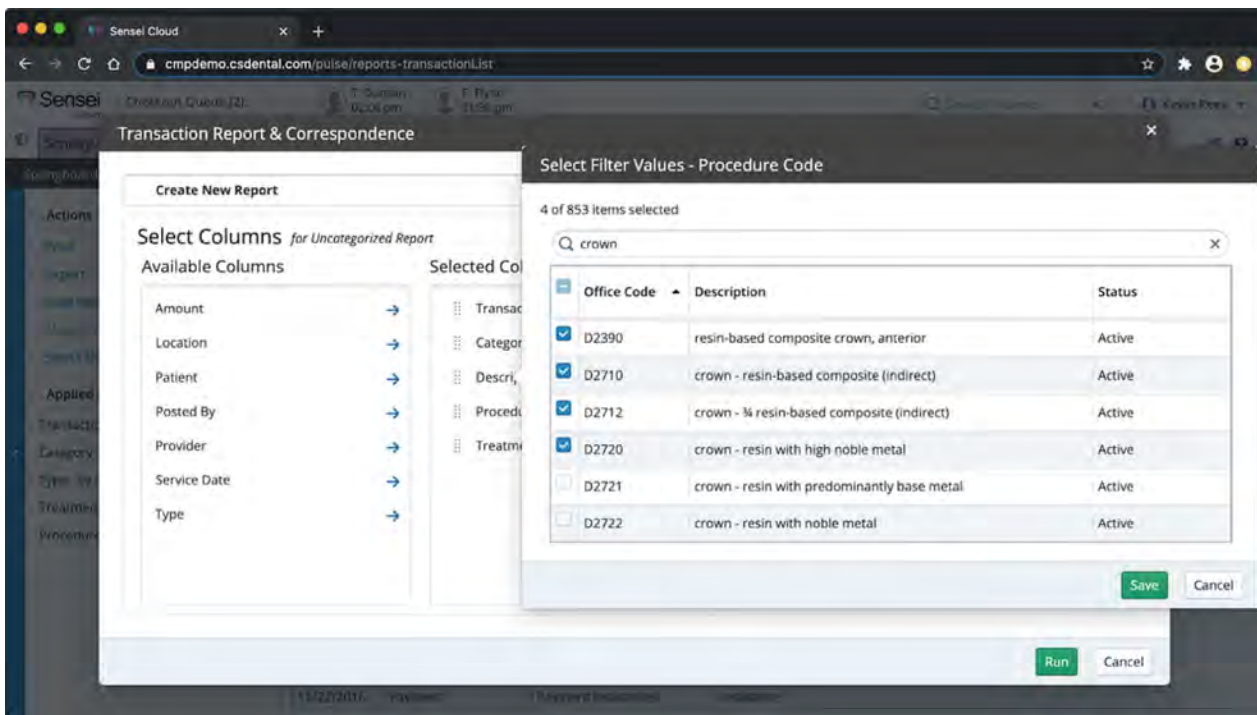
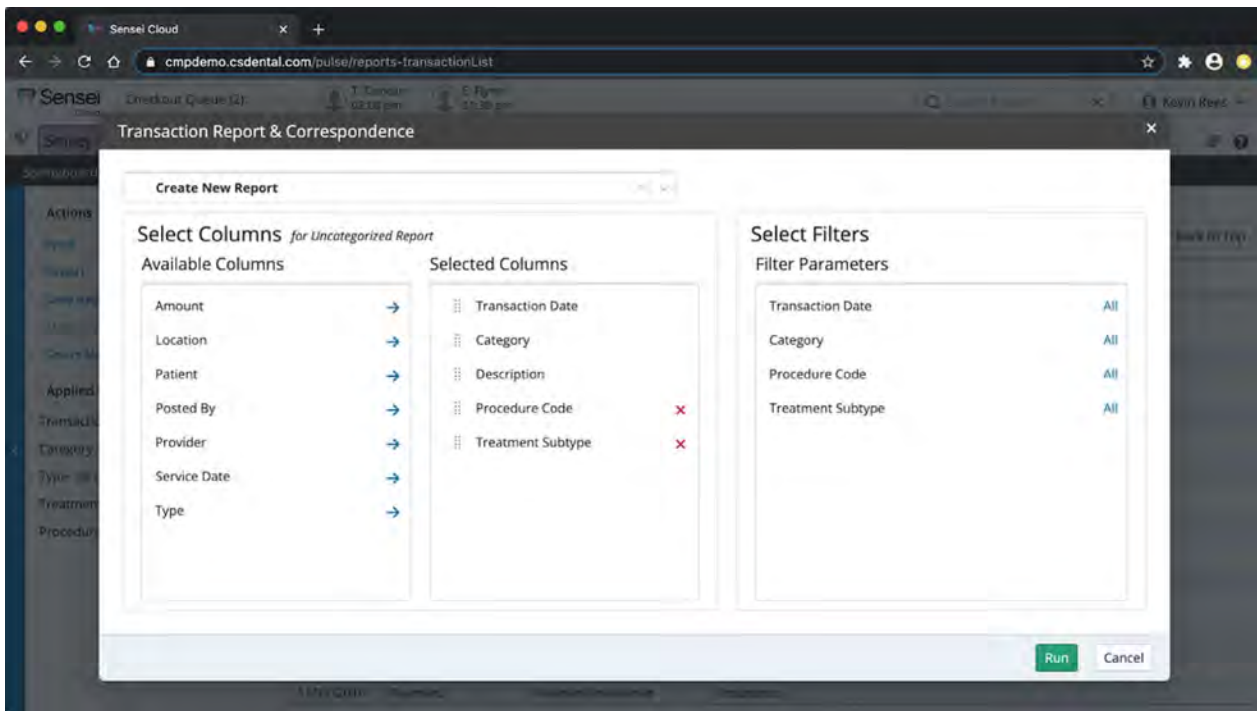
Trans Da...	Svc Date	Code	Description	Amount	Current	Total
07/21/2020	07/21/2020	D0999	unspecified diagnostic procedure, by report	\$45.00	-\$32.42	-\$32.42
09/01/2020	09/01/2020	Insurance	Payment Insurance - Claim #: 114000000000045P	-\$200.00	-\$77.42	-\$77.42
07/23/2020	07/23/2020	Credit Card	Payment 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
07/23/2020	07/23/2020	Write-Off	WRITE-OFF: Contracted Insurance	-\$1,000.00	\$497.58	\$497.58
07/23/2020	07/23/2020	Write-Off	WRITE-OFF: Contracted Insurance	-\$7,500.00	\$1,497.58	\$1,497.58
06/12/2020	06/12/2020	D9310	consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician	\$150.00	\$8,997.58	\$8,997.58
06/11/2020	10/28/2019	Payment Adjustment	ADJUSTMENT: Payment in Error	\$600.00	\$8,847.58	\$8,847.58
06/11/2020	04/07/2020	Payment Adjustment	ADJUSTMENT: Payment in Error	\$1,456.00	\$8,247.58	\$8,247.58

We hope these improvements provide value to your workflows involving the handling of financial transactions. We look forward to hearing what works well and what additional enhancements can be made.

## Transaction List Reporting Enhancements

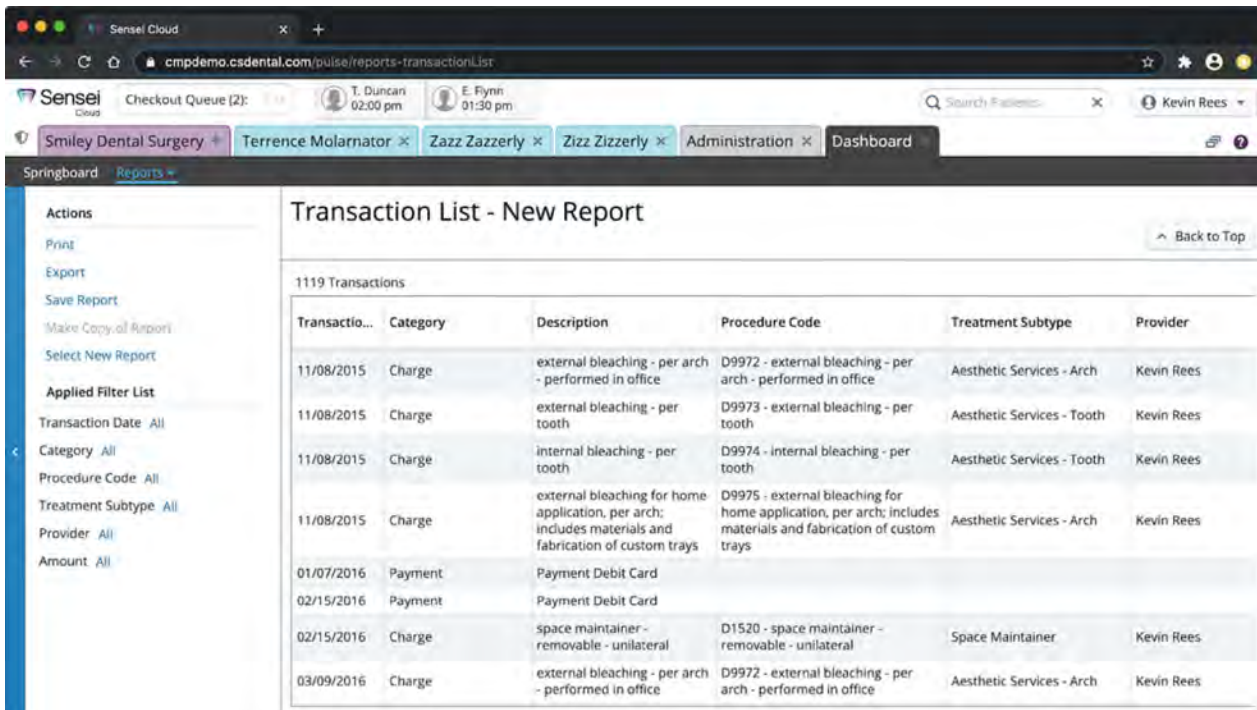
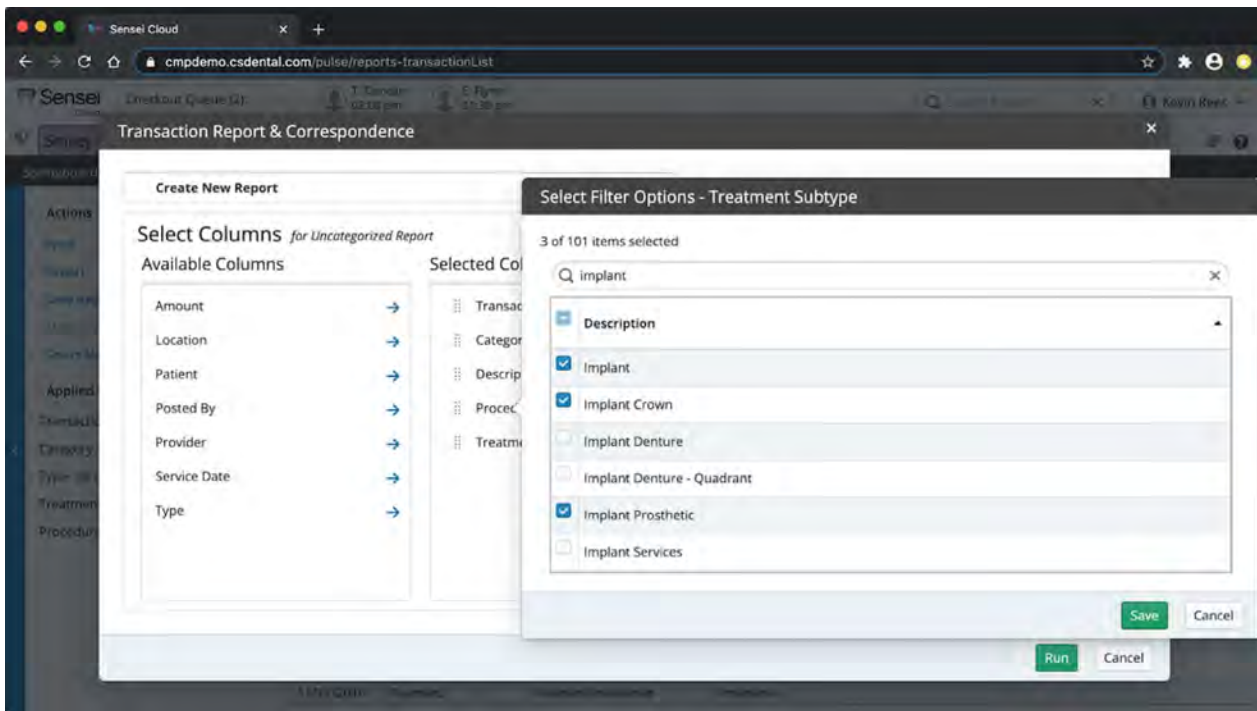
To improve the user experience, the Transaction List reporting feature [Dashboard Tab > Reports > Transaction List] has been enhanced with reorganized available columns, as well as new columns for 'Procedure Code' and 'Treatment Type'. These enhancements make it easier to customize Transaction List reports involving production related to specific subsets of procedures.

Selecting the new 'Procedure Code' column, displays the associated Procedure Code and Description for those transactions included in your report. You can include all existing procedures (by default) or filter your results by one or more specific procedures. This enables you to generate custom reports related to the posting of charges for specific procedural services. NOTE: Only charge-based transactions (e.g., Procedures) have an associated Procedure Code value.

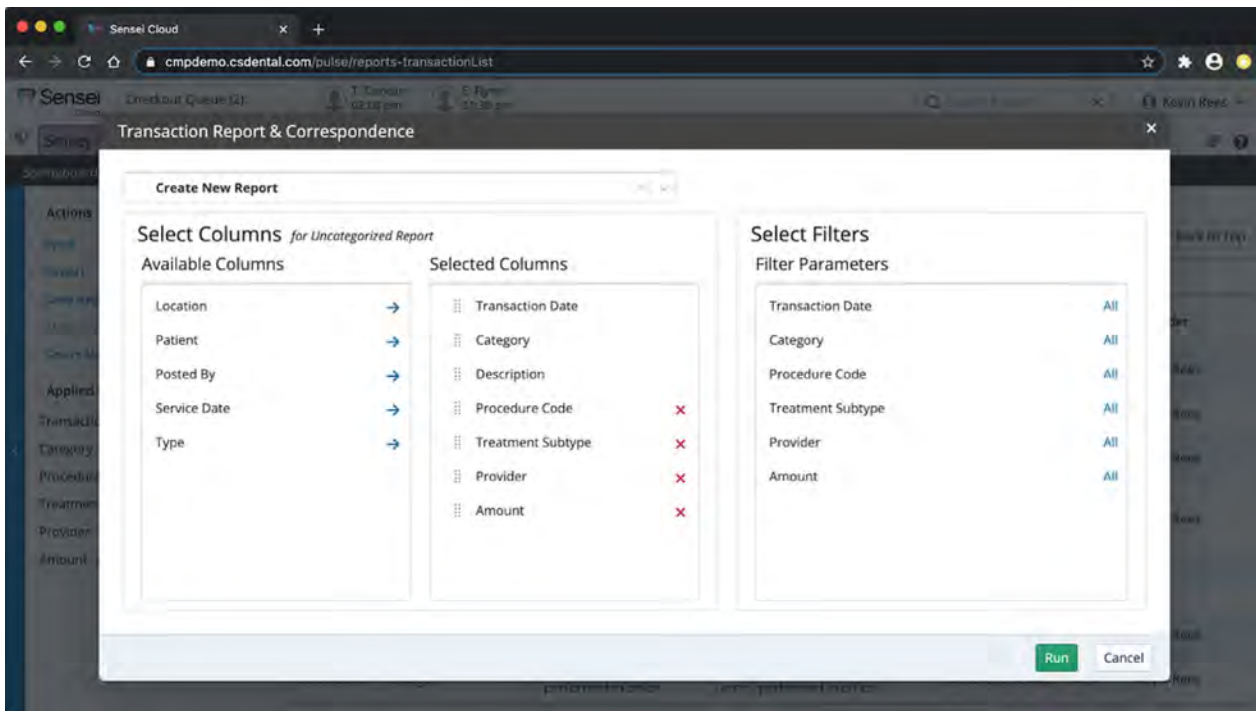


Selecting the new 'Treatment Subtype' column, displays the associated Treatment Type for those transactions included in your report. You can include all existing types (by default) or specify one or more types, enabling you to produce a report on production involving a specific subset of procedures (e.g., crowns or dentures or implants). NOTE: Only charge-based transactions (e.g., Procedures) have an associated Treatment Subtype





The resulting report from the Transaction List is now easier to predict, as the default columns included in every Transaction List report have been streamlined to just 'Transaction Date', 'Category', and 'Description', providing more flexibility when creating custom transaction reports. Additionally, you can now rearrange selected columns as desired. NOTE: The Patient List report was enhanced similarly, with default columns ('First Name', 'Last Name', and 'Phone Number') when creating a custom Patient List report.



These enhancements should improve the usability of the Transaction List module and expand the breadth of reports that can be generated. We look forward to your feedback on what else can be done to meet your reporting needs.

## Optimizations and Fixes

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

1. [OK ONLY] Removed references to estimated insurance from the treatment plan printouts for UK customers.
2. [UK ONLY] Fixed a bug that allowed certain NHS procedures to be planned for private patients or on non-NHS courses of treatment.
3. Resolved a defect in which the contract amounts displayed in the Contracts UI [Location Tab > Financial > Contract] did not match its printed view.
4. Addressed an issue in which modifications to a current appointment's scheduled procedures were not immediately reflected in the 'Today's Appointment' summary of the Orthodontic Clinical Summary UI.
5. Resolved a bug which prevented the creation of a Block Booking Template whose template name matched that of a previously deleted template.

 2 Kudos

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**kmccall**

CS Dental Employee



10-27-2020 05:58 PM

For more information, see [How to Manage Claims for a Location](#), [How to Work With the Patient Ledger](#), [How to Color-Code Ledger Transactions](#), and [How to Generate Transaction Reports](#).

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Carestream Dental LLC  
3625 Cumberland Blvd. Ste. 700  
Atlanta, GA 30339

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