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MOD kevin_moloney

Moderator



07-13-2021 09:49 PM

Sensei Cloud Release 0.1.6534 (Part 1)

Sensei Cloud

Weekly Release

Build 0.1.6534 | July 14th, 2021

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

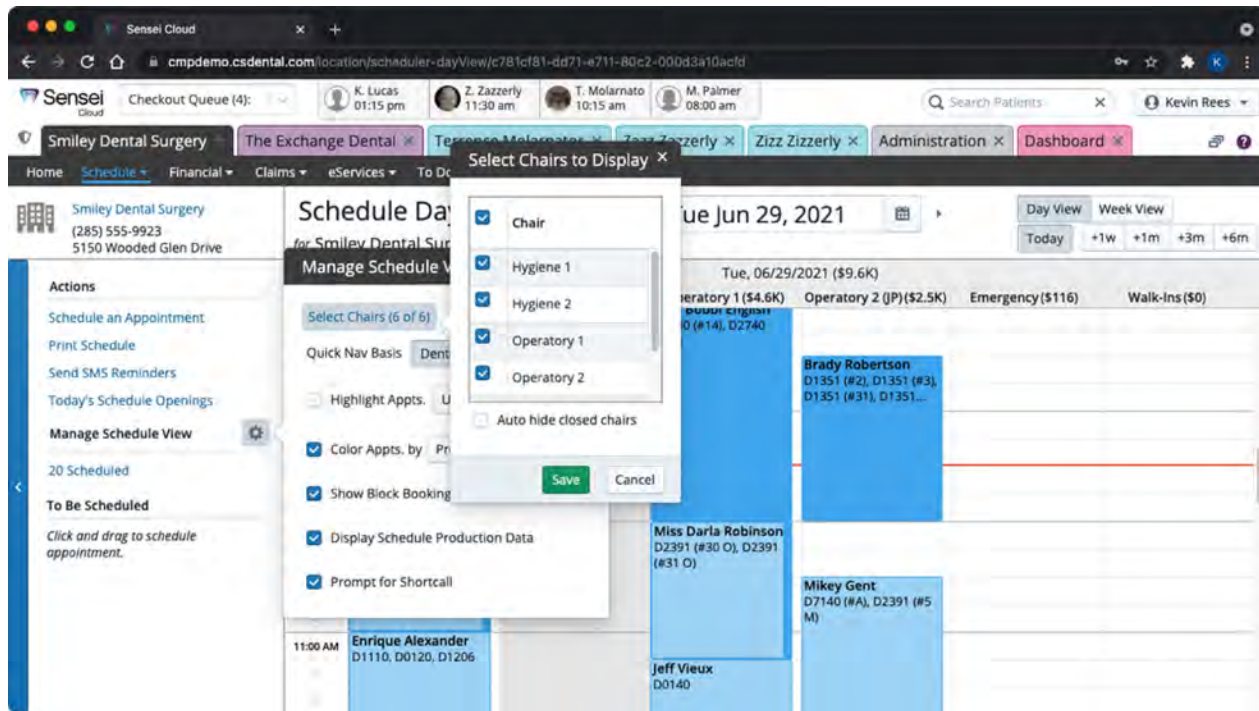
Schedule View Update - Hiding Closed

Chairs

In response to customer feedback, this week's release includes the ability to automatically hide 'closed' chairs in the Schedule Day/Week view. The new 'Auto hide closed chairs' option enables you to hide chairs from the schedule on days in which no clinical staff are working out of them [Location Tab >

Schedule > Day/Week View > Manage Schedule View 'Cog' > 'Select Chairs'].

When checked, this option will visually remove closed chairs from your schedule view.



An individual chair can be 'closed' when it has been assigned to a provider via the 'Provider Schedule Planning' screen [Administration Tab > Scheduler > Provider Schedule Planning]. On days that the chair's associated provider is set as 'closed' or does not have any working hours configured for the chair's location, then the chair is also considered 'closed'. On these days, the chair will be hidden in the appointment book. On days during which the associated provider is working, the chair will be displayed.

Sensei Cloud
 cpmdemo.cs dental.com/administrator/scheduler-providerSchedulePlanning

Checkout Queue (4): K. Lucas 01:15 pm, Z. Zazzerly 11:30 am, T. Molarnato 10:15 am, M. Palmer 08:00 am
 Search Patients Kevin Rees

Smiley Dental Surgery | The Exchange Dental | Terrence Molarnator | Zazz Zazzerly | Zizz Zizzerly | Administration | Dashboard

Locations | Team | Practice Settings | Procedures & Fees | Scheduler | Insurance | eServices | Templates | Permissions | Dashboard | Imaging

Provider Schedule Planning

Jun 2021 - Nov 2021

for Chris Spencer at Smiley Dental Surgery

Providers Selected Chair

Edit Chair

Remove Chair

Providers Current Chair:
Hygiene 2

Selected Day Details

Default Provider Hours

June 2021							July 2021							August 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30				25	26	27	28	29	30	31	29	30	31				

September 2021							October 2021							November 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4						1	2		1	2	3	4	5	6
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				

Normal Dav | Templated | Soacial Hours | Closed Dav | Past Dav | Current Dav | Selected Dav | Aoots on Dav | Aoot Conflicts

Sensei Cloud
 cpmdemo.cs dental.com/administrator/scheduler-providerSchedulePlanning

Checkout Queue (4): K. Lucas 01:15 pm, Z. Zazzerly 11:30 am, T. Molarnato 10:15 am, M. Palmer 08:00 am
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Locations | Team | Practice Settings | Procedures & Fees | Scheduler | Insurance | eServices | Templates | Permissions | Dashboard | Imaging

Provider Schedule Planning

Jun 2021 - Nov 2021

for Chris Spencer at Smiley Dental Surgery

Providers Selected Chair

Selected Day Details

Edit Days' Details

Set Days as Closed

Reser Selected Days

Tuesday, June 29, 2021

* Off

Hygienist *Chris Spencer* is Off

Wednesday, June 30, 2021

Working Office Day

Hours 8:00 AM - 12:00 PM

Default Provider Hours

June 2021							July 2021							August 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30				25	26	27	28	29	30	31	29	30	31				

September 2021							October 2021							November 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4						1	2		1	2	3	4	5	6
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				

Normal Dav | Templated | Soacial Hours | Closed Dav | Past Dav | Current Dav | Selected Dav | Aoots on Dav | Aoot Conflicts

Schedule Day/View Tue Jun 29, 2021

for Smiley Dental Surgery

Time	Hygiene 1 (\$2.4K)	Operatory 1 (\$4.6K)	Operatory 2 (JP) (\$2.5K)	Emergency (\$116)	Walk-Ins (\$0)
8:00 AM	Ms. Meredith Palmer D0120, D1110, D0274	Miss Bobbi English D2740 (#14), D2740 (#15)			
9:00 AM	Ms. Joe Holden D4910, D0120		Brady Robertson D1351 (#2), D1351 (#3), D1351 (#31), D1351 (#30)		
10:00 AM	Kevin Doyle D0120, D1110	Miss Darla Robinson D2391 (#30 O), D2391 (#31 O)			
11:00 AM	Enrique Alexander D1110, D0120, D1206		Mikey Gent D7140 (#A), D2391 (#5 M)		

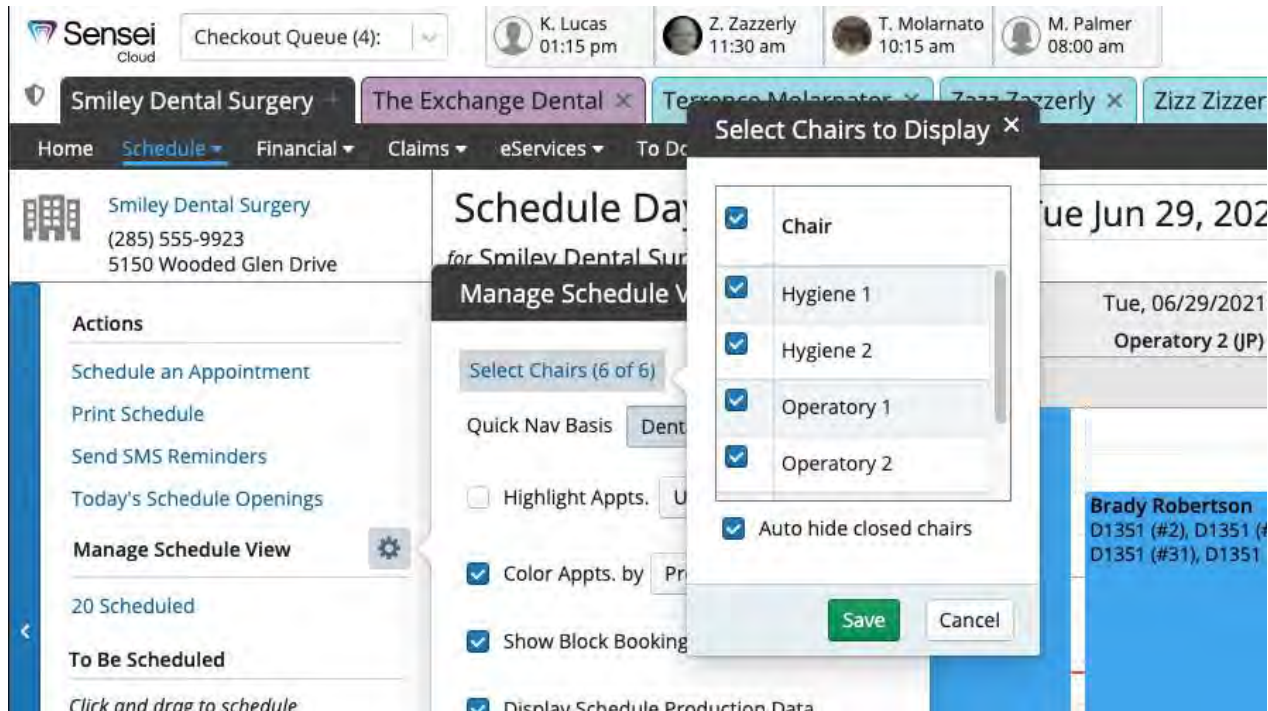
Schedule Day/View Wed Jun 30, 2021

for Smiley Dental Surgery

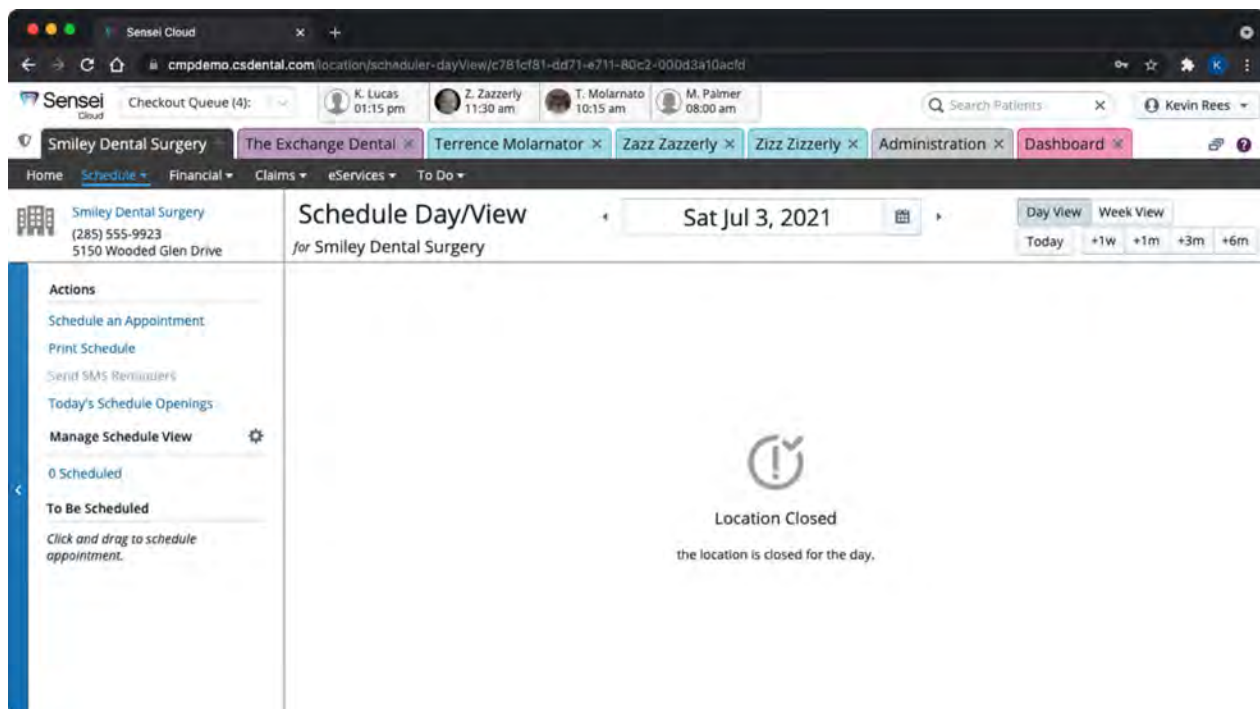
Time	Hygiene 1 (\$0)	Hygiene 2 (CS) (\$0)	Operatory 1 (\$0)	Operatory 2 (JP) (\$0)	Emergency (\$0)	Walk-Ins (\$0)
8:00 AM						
9:00 AM						
10:00 AM						
11:00 AM						

You can still elect to manually hide chairs from your schedule view using the existing 'Select Chairs to Display' controls in the Schedule DayView [Location Tab > Schedule Day/Week View > Manage Schedule View 'Cog' > 'Select Chairs']. Unchecking chairs will hide them from your schedule view even when not 'closed' based on associated provider working hours. These controls will continue to work in conjunction with the new 'Auto hide' option, providing you with flexibility in how your schedule view is constructed. NOTE: As with these existing view options, the new 'Auto hide' option only applies to the currently

logged in user. Each user defines their own schedule view settings and can update them at any time via the Manage Schedule View 'Cog'. View settings will persist (for the logged in user, in that location) until modified.



Lastly, if the 'Auto hide' setting is enabled and a set of conditions results in all chairs being 'closed' for the day (e.g., location is closed or all chairs in view are closed), then no chairs are displayed and a special message is presented for the day.



We hope that these new schedule view configuration options improve your scheduling and appointment management workflows. Please send us your feedback on what works well and what additional enhancements might be needed.

Send Emails To (or About) Patients

This week's release enables you to quickly send ad-hoc emails to (or about) a patient. With this update, the patient's email address is now a clickable action wherever it is displayed. Click on the patient's email or any of the 'Send Email' actions throughout Sensei Cloud (e.g., Patient Tab > Home OR Correspondence OR Snapshot) to open the new 'Send an Email' dialog and compose your message.

The screenshot displays the Sensei Cloud interface for a patient named Terrence Molarnator. The page includes a navigation bar with tabs for 'Smiley Dental Surgery', 'The Exchange Dental', 'Terrence Molarnator', 'Zazz Zazzerly', 'Zizz Zizzerly', 'Administration', and 'Dashboard'. The patient's profile is shown with a photo, name, age (40 yrs), and phone number (916) 555-2148. The 'Contact Info' tab is active, displaying the patient's address (250 Piedmont Avenue NE, Atlanta Georgia 30308) and email address (terry.muller@demo.net). The 'Appointments' section shows a scheduled appointment for Tuesday, June 29, 2021 at 01:00 pm in Emergency at Smiley Dental Surgery. The 'Insurance' section shows that eligibility is active and the payer is CSD Enhanced MetLife.

Appt. Status	Appt Info
Scheduled	Tuesday, June 29, 2021 at 01:00 pm in Emergency at Smiley Dental Surgery

Actions

- Send Correspondence
- Send Email

Filter Reset

Search Correspondence

Corr Sent All Dates

Corr Category All Categories

File Name	Category	Template Name	Modality	File ...	Creat
Referral Follow-Up Letter for Terrence Molarnator 08-02-2019.pdf	Referral	Consult	Letter	pdf	08/02
File Data Unavailable (See Patient Files)	Scheduling	Appointment Reminder (email)	Email	-	01/18
Referral Follow-Up Email for Terrence Molarnator 03-11-2021.pdf	Referral	Copy of Consult	Email	pdf	03/11

From the 'Send an Email' dialog, first select an addressee type. While Sensei Cloud defaults to 'patient', you can choose to direct the email to any of the patient's active responsible parties, referral sources, or (insurance) policyholders. The available recipients are based on those defined in the patient's record [Patient Tab > Patient Record]. Next, select the specific recipient (if multiple options exist), enter an email address (if necessary), and specify the correspondence type to help classify the communication. NOTE: If an email address has not already been specified for the selected recipient, then you can enter one and are then given the option to automatically update the person's record when the email is sent.

Send an Email from Inquiries@smileydentalsurgery.com

Addressee

- Patient
- Responsible Party
- Referral Source
- Policy Holder

Recipient Name

Terrence Molarnator

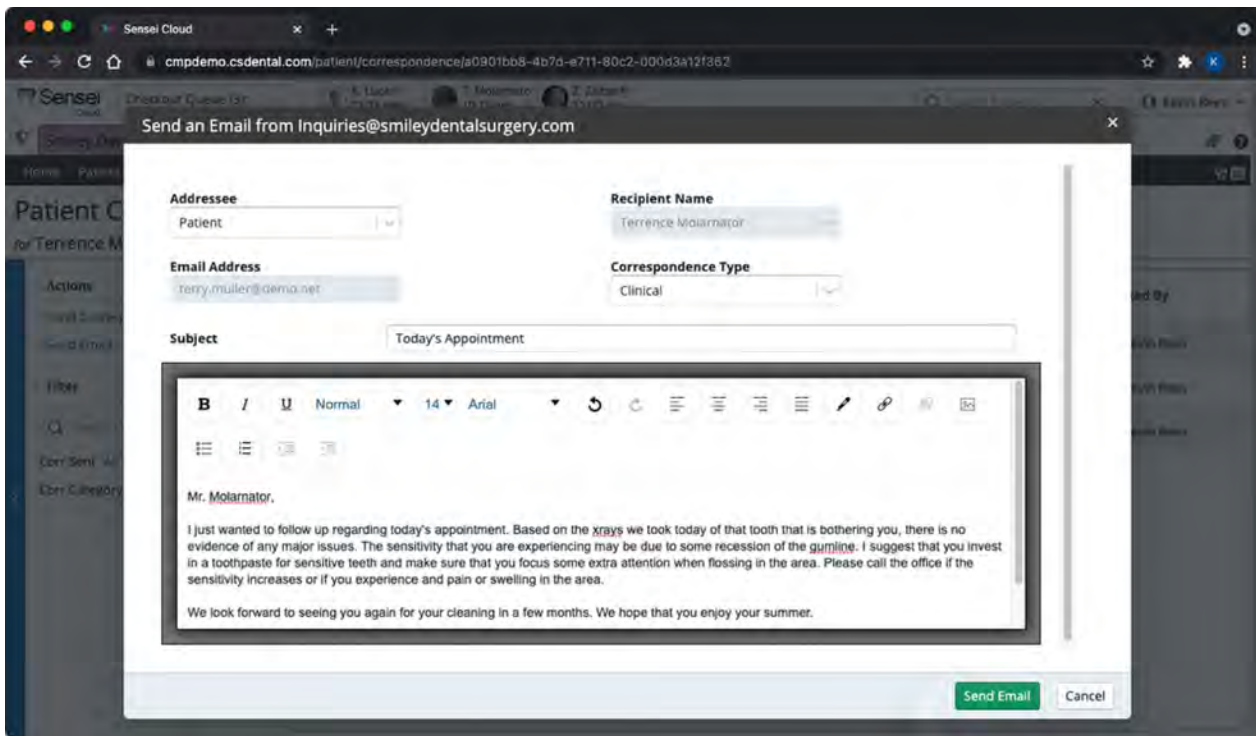
Correspondence Type

Search

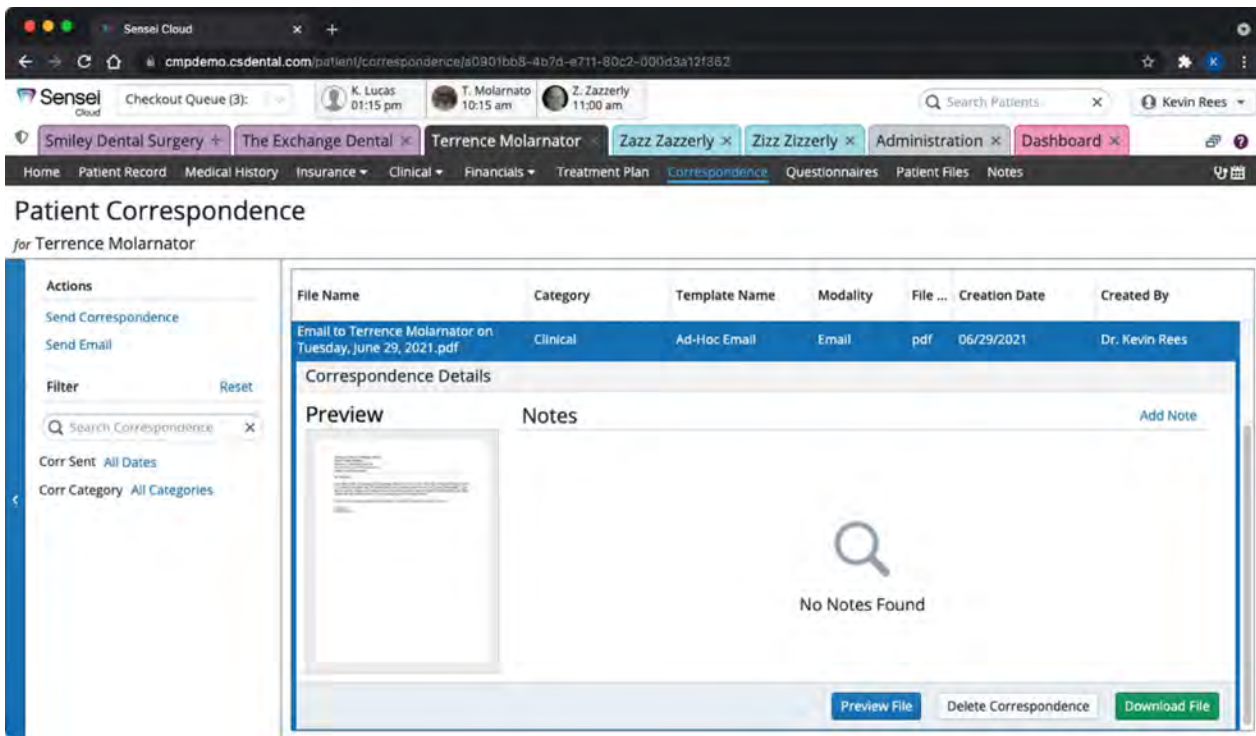
Enter Subject

B / **I** / **U** Normal 14 Arial

Send Email **Cancel**



Finally, enter a subject and compose your message. Rich text formatting controls are available to create a professionally constructed message, including standard font styling and layout tools as well as the ability to insert images (e.g., your practice logo). Once complete, click 'Send Email'. A .pdf copy of the email is saved to the patient's correspondence record for documentation and future reference [Patient Tab > Correspondence]. NOTE: To send an email message using your practice's existing email-based templates and/or merge field, use the existing 'Send Correspondence' functionality (e.g., via any 'Send Correspondence' action or via Patient Tab > Correspondence).



We hope that these new email capabilities improve your patient communication workflows. We look forward to your feedback on this new functionality and what else can be improved.

Patient Follow-Up Worklist (Night Call)

Based on customer requests, Sensei Cloud now includes support for managing patient follow-up workflows (aka 'night call'). Individual appointments can be flagged as requiring follow-up, placing these patients on the new 'Patient Follow-Up List' so that you can manage your post-encounter communications [Location Tab > To Do > Patient Follow-Up List]. NOTE: This is separate from the existing 'Referral Follow-Up List' functionality, which is designed to support communication with a patient's active referral source after being seen.

Patient	Date / Time	Location / Ch...	Provider	Appt Ty...	Scheduled Procedu...	Referral
Tina Mayer (916) 555-0533 (Back Office)	Checked Out on Tue, Jun, 29 at 8:00 am (90 Mins)	Smiley Dental Surgery / Operator 2	Dr. Muj Fletcher, Chris Spencer	Surgery	D7210 (#16)	Barry Larba
Janelle Ferrell (702) 555-5986 (Work Fax)	Checked Out on Tue, Jun, 29 at 9:00 am (45 Mins)	Smiley Dental Surgery / Emergency	Dr. Kevin Rees, Chris Spencer	Emergenc / Walk-in	D0140	Hason Jugues
Miley Gent (404) 555-8787 (Home)	Checked Out on Tue, Jun, 29 at 9:30 am (75 Mins)	Smiley Dental Surgery / Operator 1	Dr. Jason Parker, Chris Spencer	Surgery	D7140 (#A), D2391 (#5 M)	Gichael Ment
Jeff Vieux (555) 321-4567 (Mobile)	Checked Out on Tue, Jun, 29 at 9:45 am (45 Mins)	Smiley Dental Surgery / Emergency	Dr. Kevin Rees	Emergenc / Walk-in	D0140	Teff Jelford
Zazz Zazzerly (555) 555-5555 (Home)	Completed on Tue, Jun, 29 at 11:00 am (45 Mins)	Smiley Dental Surgery / Emergency	Dr. Kevin Rees	Consult	D0140, D0220 (#15)	Gark Modfrey
Evan Daniels (916) 555-3269 (Home)	Checked Out on Tue, Jun, 29 at 1:00 pm (60 Mins)	Smiley Dental Surgery / Hygiene 1	Dr. Kevin Rees, Mark King	Perio	D0120, D4910, D0274	N/A
Terrence Molarnator	Scheduled on Tue	Smiley Dental				

Click 'Yes' for 'Pt Follow-Up' in the Appointment Card when creating or managing an existing appointment to flag it as requiring follow-up. Alternatively, if your practice uses appointment types when scheduling, then click 'Yes' for 'Requires Follow-Up' when creating or updating an appointment type [Administration Tab > Practice Settings > Appointment Type]. Whenever the appointment type is assigned to a future appointment, it will automatically be flagged as requiring follow-up. However, this can be manually overridden on a case-by-case basis.

Appointment for Terrence Molarnator on Tue, Jun 29, 2021 1:00 PM at Smiley Dental Surgery in Emergency

Terrence Molarnator
(916) 555-2148
40 yrs (Self)

Medical Alerts (6)
(6) + Asthma
(2) ! Difficult Breathing

Code	Description	Tooth/Quad	Surface(s)	Amount
D0220	periapical first radiographic image	2		\$51.00
D0230	intraoral - periapical each additional radiographic image	3		\$46.00
Total				\$115.80
Total Due (Pt Due)				\$212.80 (\$33.25)

Appointment Info
Scheduled | Checked In | Seated | Completed | Cancelled

Teledentistry:

Location: Smiley Dental Surgery

Appt Type: Search

Pt Follow-Up: Yes No

Confirmed: Yes No

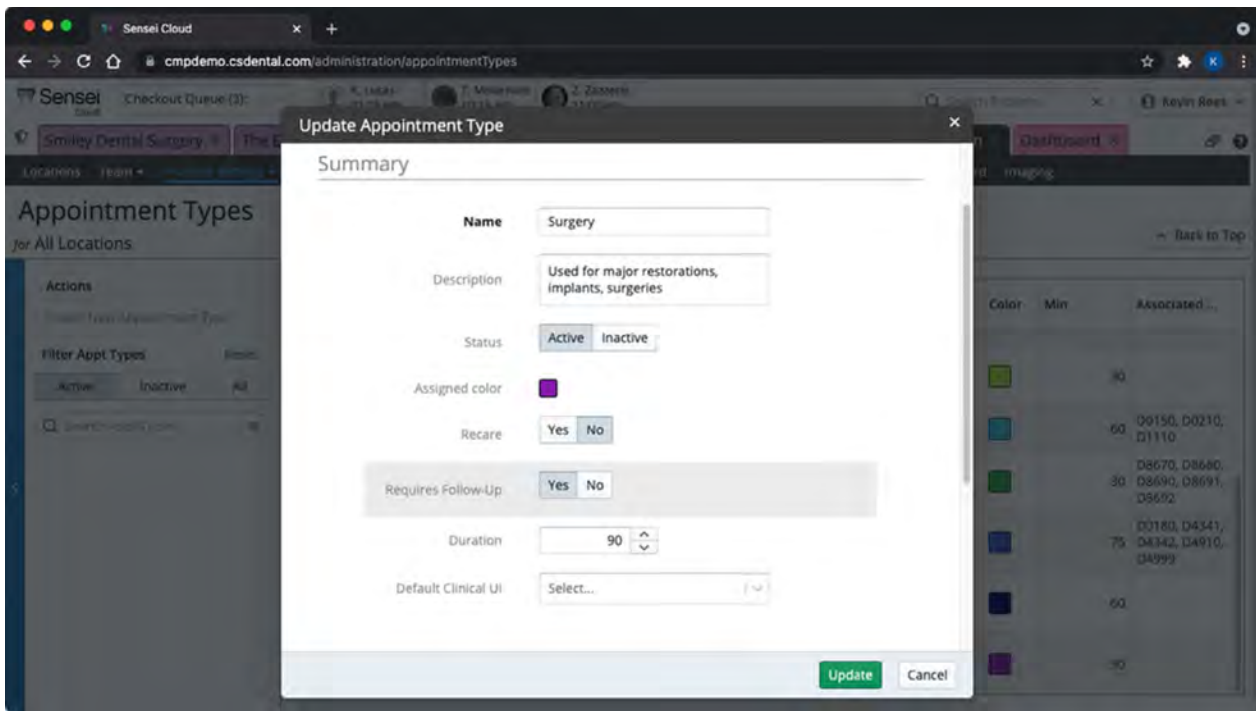
Put on Shortcall: No AM Only PM Only Anytime

Duration: 60 Minutes

Doctor: Dr. Kevin Rees

Hygienist: Chris Spencer

Buttons: Copy as New Appt, Update Appointment, Reschedule, Cancel



Appointments that have been flagged as requiring follow-up are automatically added to the new 'Patient Follow-Up List' [Location Tab > To Do > Patient Follow-Up List]. By default, the worklist displays all (flagged) appointments from the current day, following their scheduled end time. There are several filters that enable you to generate a desired subset of follow-up appointments, including provider, appointment type, appointment status, or date range. This also includes the ability to search for appointments by specific patients or procedures. NOTE: Flagged appointments are automatically added to the worklist even if they never happened (e.g., 'no shows'). This helps to ensure that patients who needed the treatment that they didn't receive can also be contacted.

The screenshot displays the 'Patient Follow-Up List' in the Sensei Cloud application. The interface includes a top navigation bar with user profiles and a search bar. Below this is a breadcrumb trail and a main header for the 'Patient Follow-Up List' with a 'Back to Top' button. The list is filtered by 'All Providers, All Types, All Statuses, Today'. A table lists several appointments with columns for Patient, Date / Time, Location / Ch..., Provider, Appt Ty..., Scheduled Procedu..., and Referral. A left sidebar provides actions for the list and a filter panel.

Patient	Date / Time	Location / Ch...	Provider	Appt Ty...	Scheduled Procedu...	Referral
Tina Mayer (916) 555-0533 (Back Office)	Checked Out on Tue, Jun, 29 at 8:00 am (90 Mins)	Smiley Dental Surgery / Operator 2	Dr. Muj Fletcher, Chris Spencer	Surgery	D7210 (#16)	Barry Larba
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Terrence Molarnator	Scheduled on Tue	Smiley Dental				

Clicking on an appointment in the worklist expands the record to display additional information. This includes details about the patient's active referral source, recent prescriptions generated in Sensei Cloud, and the appointment's scheduled work (e.g., procedures). You can add contact notes about the follow-up, which will be documented in the associated appointment record and patient's Notes [Patient Tab > Notes]. From here, you can mark the follow-up as complete or remove the appointment from the worklist (if follow-up not required). These actions remove the appointment from the worklist and create a system-generated note about the status update. NOTE: Actions can also be applied in bulk, to several patients in the worklist, by ticking the checkboxes for each target appointment and then clicking the appropriate action in the side panel.

Sensei Cloud

cmpdemo.cs dental.com/location/patient-follow-up/c781cf81-dd71-e711-80c2-000d3a10acfd

Checkout Queue (3): K. Lucas 01:15 pm, T. Molarnato 10:15 am, Z. Zazzerly 11:00 am

Smiley Dental Surgery | The Exchange Dental | Terrence Molarnator | Zazz Zazzerly | Zizz Zizzerly | Administration | Dashboard

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

Smiley Dental Surgery

(285) 555-9923
5150 Wooded Glen Drive

Patient Follow-Up List

Filtered by All Providers, All Types, All Statuses, Today

Patient	Date / Time	Location / Ch...	Provider	Appt Ty...	Scheduled Procedu...	Referral
Tina Mayer (916) 555-0533 (Back Office)	Checked Out on Tue, Jun, 29 at 8:00 am (90 Mins)	Smiley Dental Surgery / Operatory 2	Dr. Muj Fletcher, Chris Spencer	Surgery	D7210 (#16)	Barry Larba

Actions

Mark as Complete
Remove from List

Filter List Reset

Patient / Procedure Code

Search Patients / Procedure Co...

Providers: All Providers

Appt Types: All Types

Appt Statuses: All Statuses

Date: Today

Appt Type Surgery

Procedures
D7210 - (#16) extraction, erupted tooth requiring removal of bone and/or sectioning of tooth, and including elevation of mucoperiosteal flap if indicated

Recent Rx
Pt has no recent prescriptions

Notes Add Note

Completed - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Seated - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Checked In - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Mark as Complete Remove from List

Sensei Cloud

cmpdemo.cs dental.com/location/patient-follow-up/c781cf81-dd71-e711-80c2-000d3a10acfd

Checkout Queue (3): K. Lucas 01:15 pm, T. Molarnato 10:15 am, Z. Zazzerly 11:00 am

Smiley Dental Surgery | The Exchange Dental | Terrence Molarnator | Zazz Zazzerly | Zizz Zizzerly | Administration | Dashboard

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

Smiley Dental Surgery

(285) 555-9923
5150 Wooded Glen Drive

Patient Follow-Up List

Filtered by All Providers, All Types, All Statuses, Today

Actions

Mark as Complete
Remove from List

Filter List Reset

Patient / Procedure Code

Search Patients / Procedure Co...

Providers: All Providers

Appt Types: All Types

Appt Statuses: All Statuses

Date: Today

Appt Type Surgery

Procedures
D7210 - (#16) extraction, erupted tooth requiring removal of bone and/or sectioning of tooth, and including elevation of mucoperiosteal flap if indicated

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Notes Add Note

Completed - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Seated - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Checked In - Tue, Jun 29, 2021 9:40 AM by Dr. Kevin Rees

Mark as Complete Remove from List

Create Appointment Note

Patient Contacted by Phone Text Email

Discussed post-op care with patient. Keep wound clean. Rinse / Irrigate with saline solution as needed. Rx for pain meds to be sent to preferred pharmacy. Contact office with any concerns. Follow-up scheduled in 3 days.

Create Cancel

We hope that this new functionality provides support for your patient communication workflows. Please let us know what additional enhancements can be made to support follow-up care of your patients.

[0.1.6534 RELEASE UPDATES CONTINUED ON PART 2]

 Add tags


2 Kudos

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