MOD kevin_moloney
Moderator

07-13-2021 09:49 PM

Sensei Cloud Release 0.1.6534 (Part 1)

Sensei Cloud

Weekly Release

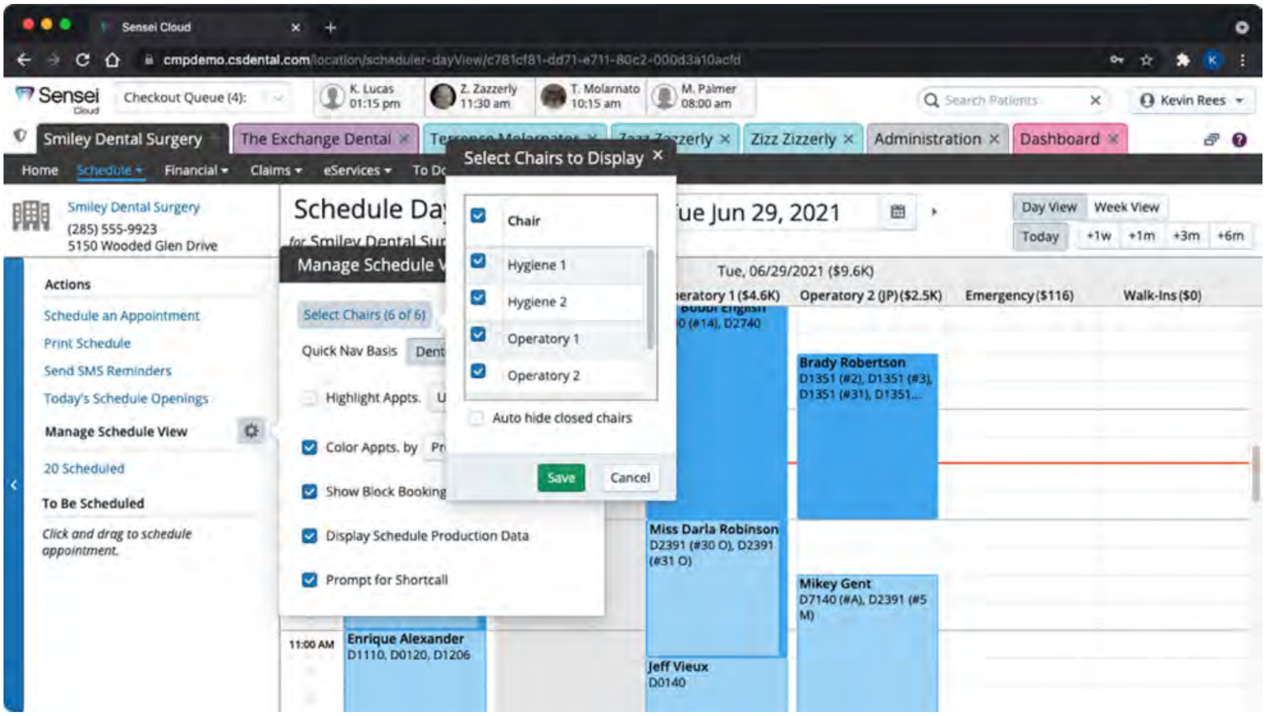
Build 0.1.6534 | July 14th, 2021

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

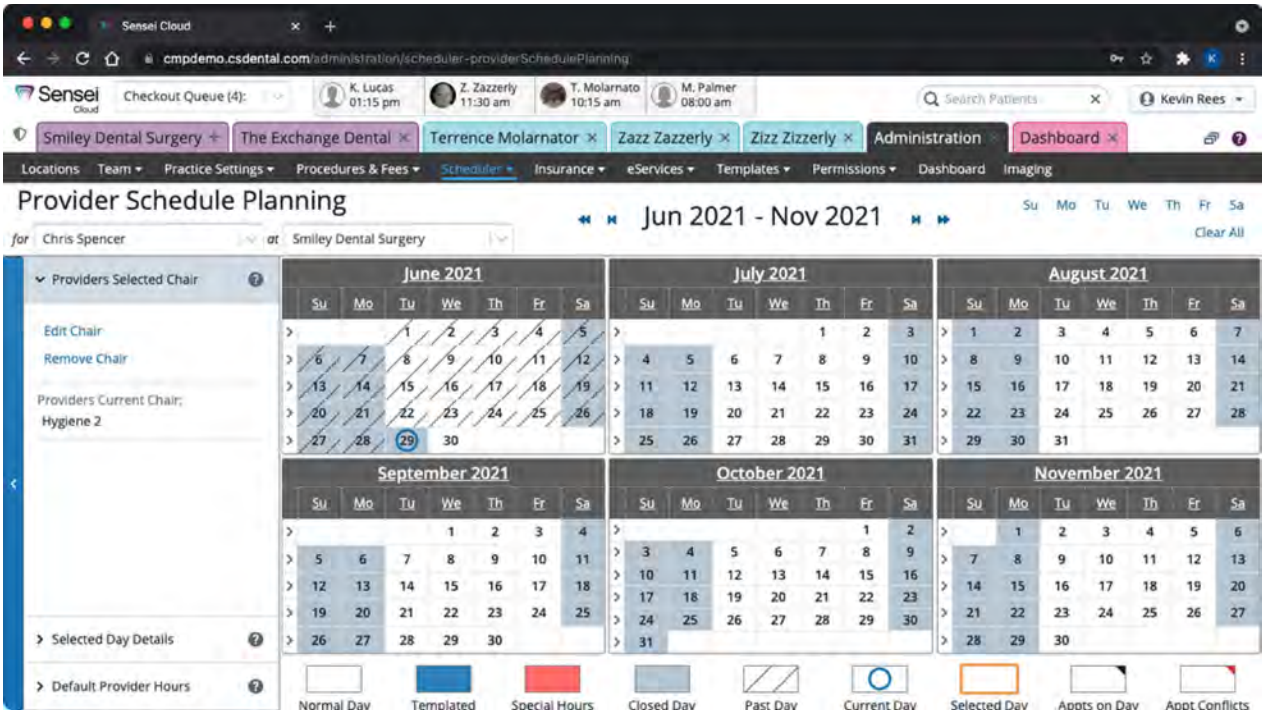
Schedule View Update - Hiding Closed Chairs

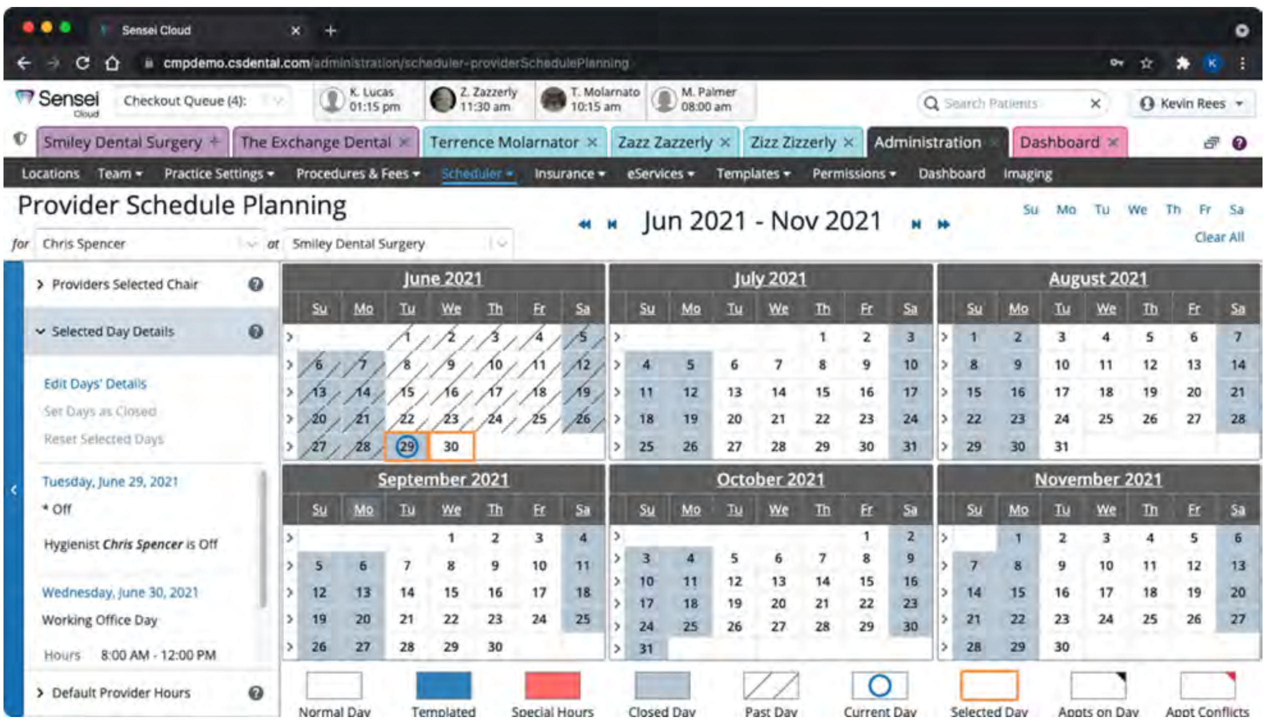
In response to customer feedback, this week's release includes the ability to automatically hide 'closed' chairs in the Schedule Day/Week view. The new 'Auto hide closed chairs' option enables you to hide chairs from the schedule on days in which no clinical staff are working out of them [Location Tab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

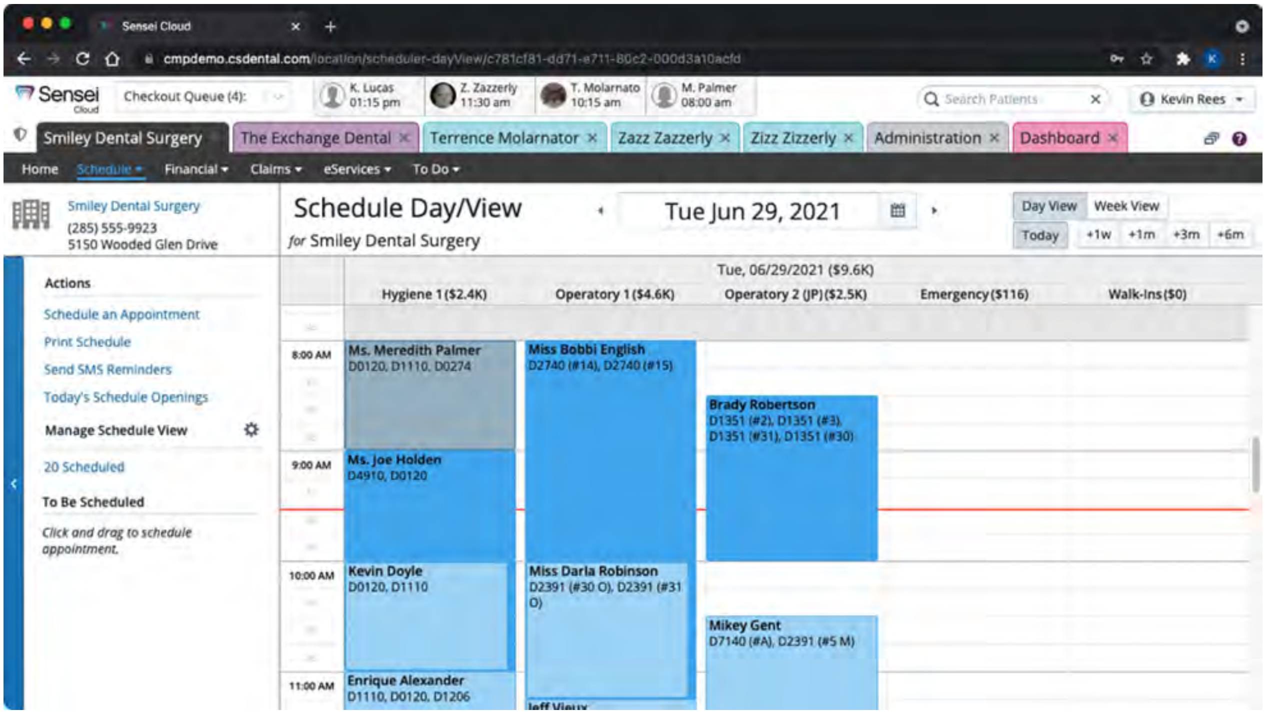
Schedule > Day/Week View > Manage Schedule View ‘Cog’ > ‘Select Chairs’]. When checked, this option will visually remove closed chairs from your schedule view.

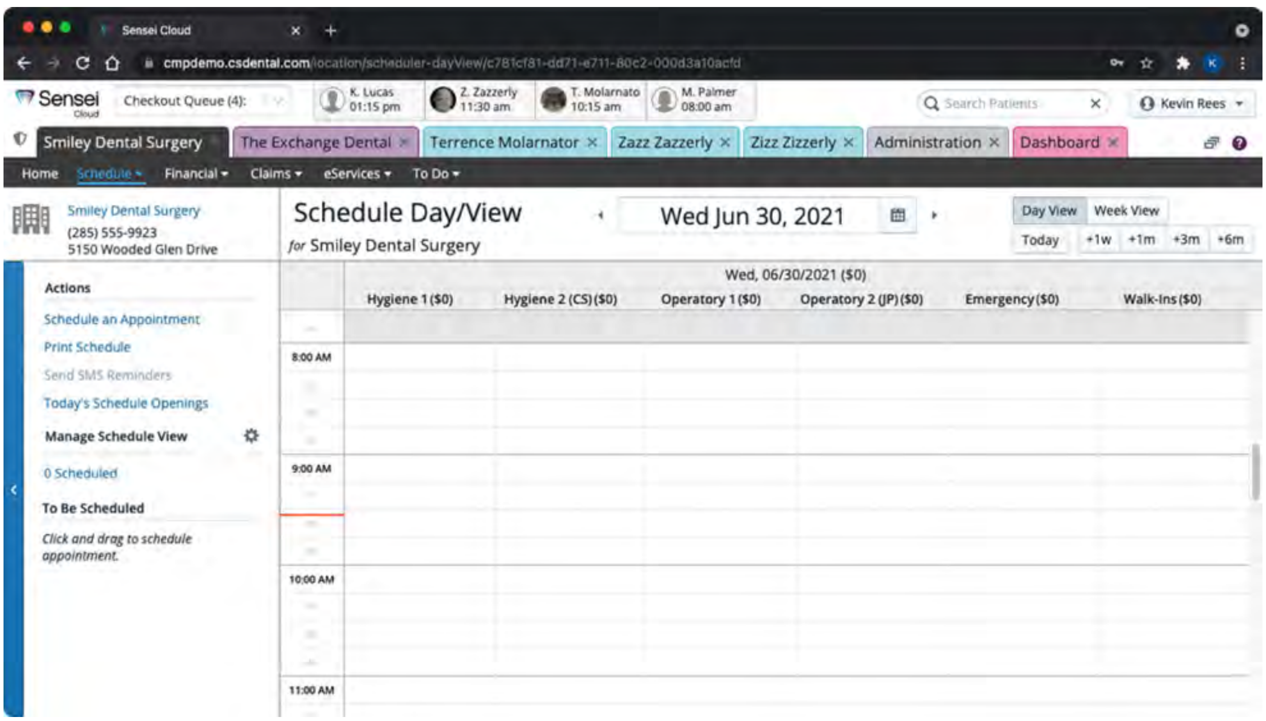


An individual chair can be ‘closed’ when it has been assigned to a provider via the ‘Provider Schedule Planning’ screen [Administration Tab > Scheduler > Provider Schedule Planning]. On days that the chair’s associated provider is set as ‘closed’ or does not have any working hours configured for the 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.

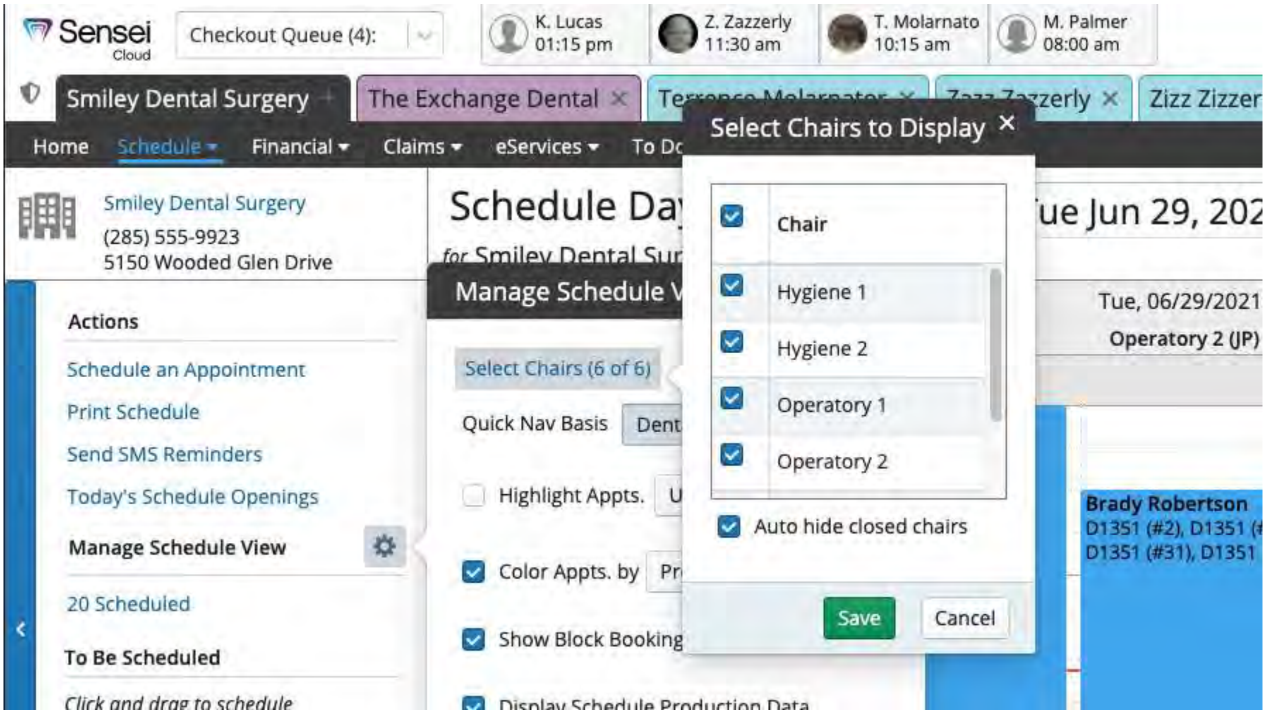

Sensei Cloud
cmpdemo.csdental.com/administration/scheduler-providerSchedulePlanning
Checkout Queue (4):
K. Lucas 01:15 pm
Z. Zazzerly 11:30 am
T. Molarnato 10:15 am
M. Palmer 08:00 am
Kevin Rees
Smiley Dental Surgery
The Exchange Dental
Terrence Molarnator
Zazz Zazzerly
Zizz Zizzerly
Administration
Dashboard
Locations
Team
Practice Settings
Procedures & Fees
Scheduler
Insurance
eServices
Templates
Permissions
Dashboard
Imaging
Provider Schedule Planning
Jun 2021 - Nov 2021
Su Mo Tu We Th Fr Sa
Clear All
for Chris Spencer
at Smiley Dental Surgery
Providers Selected Chair
Edit Chair
Remove Chair
Providers Current Chair:
Hygiene 2
June 2021
July 2021
August 2021
September 2021
October 2021
November 2021
Selected Day Details
Default Provider Hours
Normal Day
Templated
Special Hours
Closed Day
Past Day
Current Day
Selected Day
Appts on Day
Appt Conflicts


Sensei Cloud
cmpdemo.csdental.com/administration/scheduler-providerSchedulePlanning
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
Reset 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
Normal Day
Templated
Special Hours
Closed Day
Past Day
Current Day
Selected Day
Appts on Day
Appt Conflicts

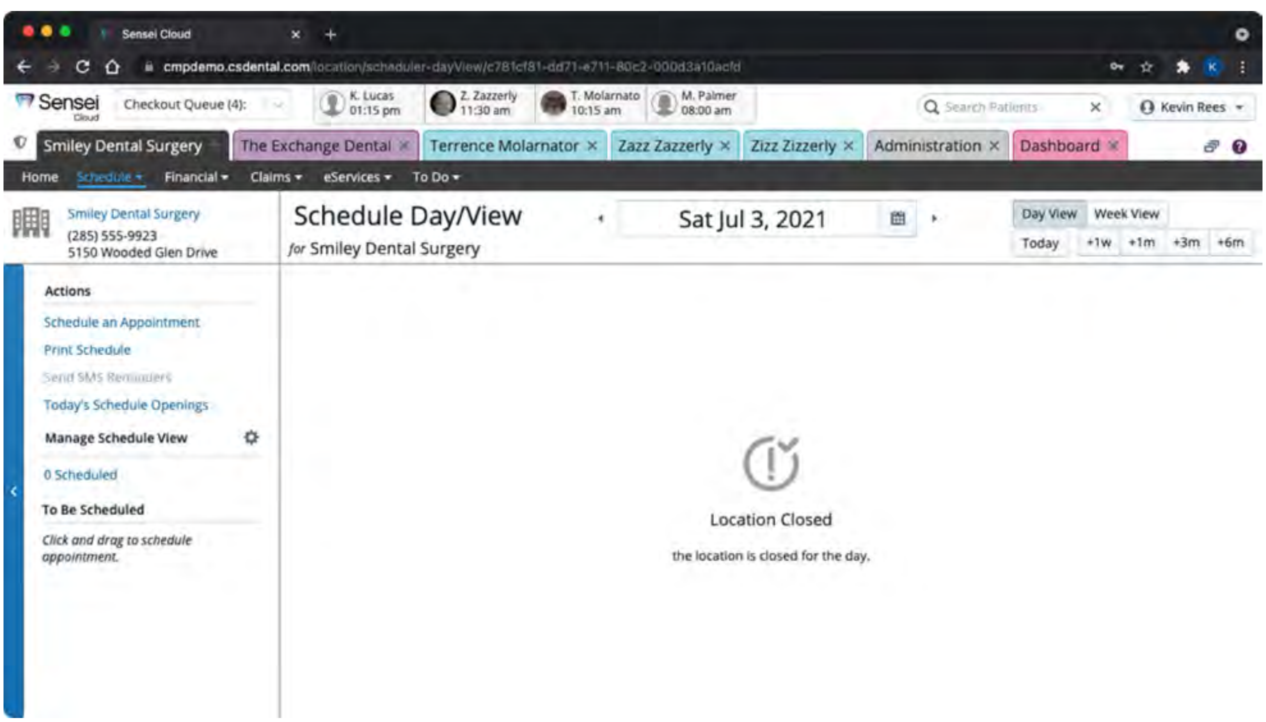




You can still elect to manually hide chairs from your schedule view using the existing ‘Select Chairs to Display’ controls in the Schedule DayView [Location Tab > Schedule Day/Week View > Manage Schedule View ‘Cog’ > ‘Select Chairs’]. Unchecking chairs will hide them from your schedule view even when 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.



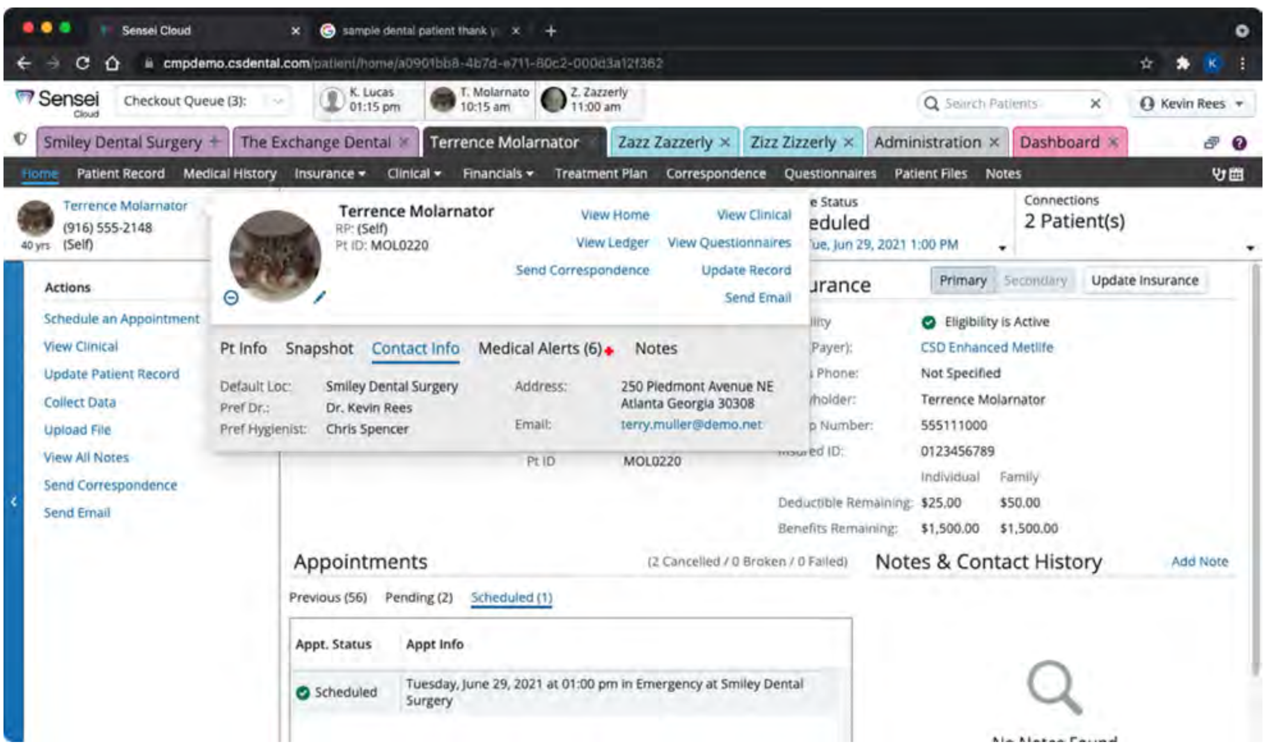
Lastly, if the 'Auto hide' setting is enabled and a set of conditions results in all chairs being 'closed' for the day (e.g., location is closed or all chairs in view are closed), then no chairs are displayed and a special message is presented for the day.

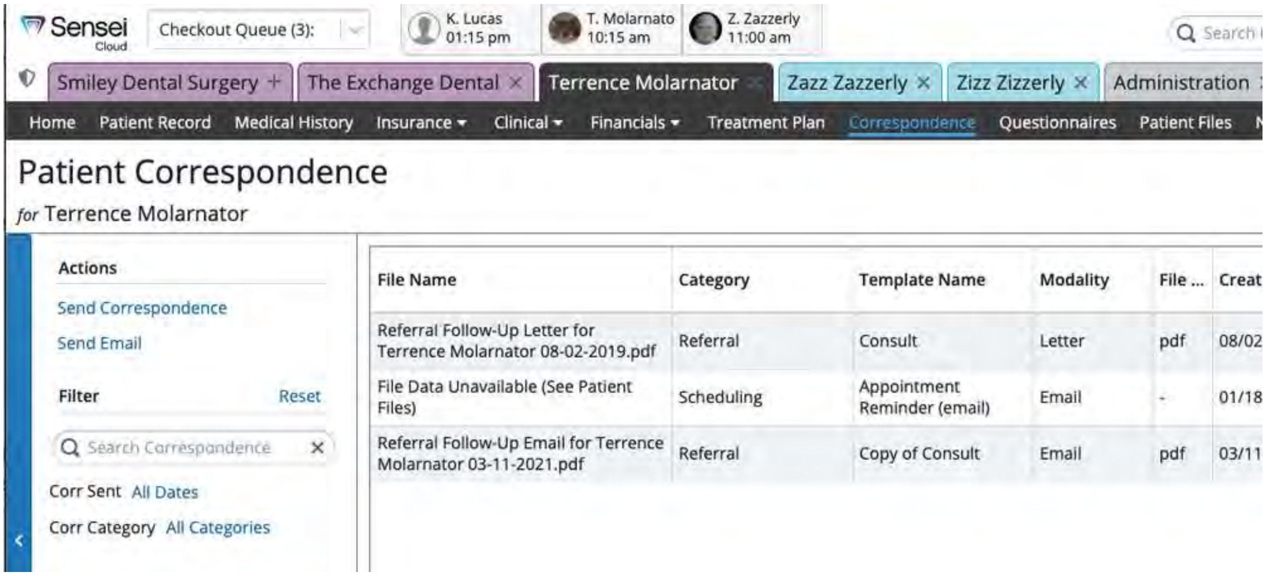


We hope that these new schedule view configuration options improve your scheduling and appointment management workflows. Please send us your feedback on what works well and what additional enhancements might be needed.

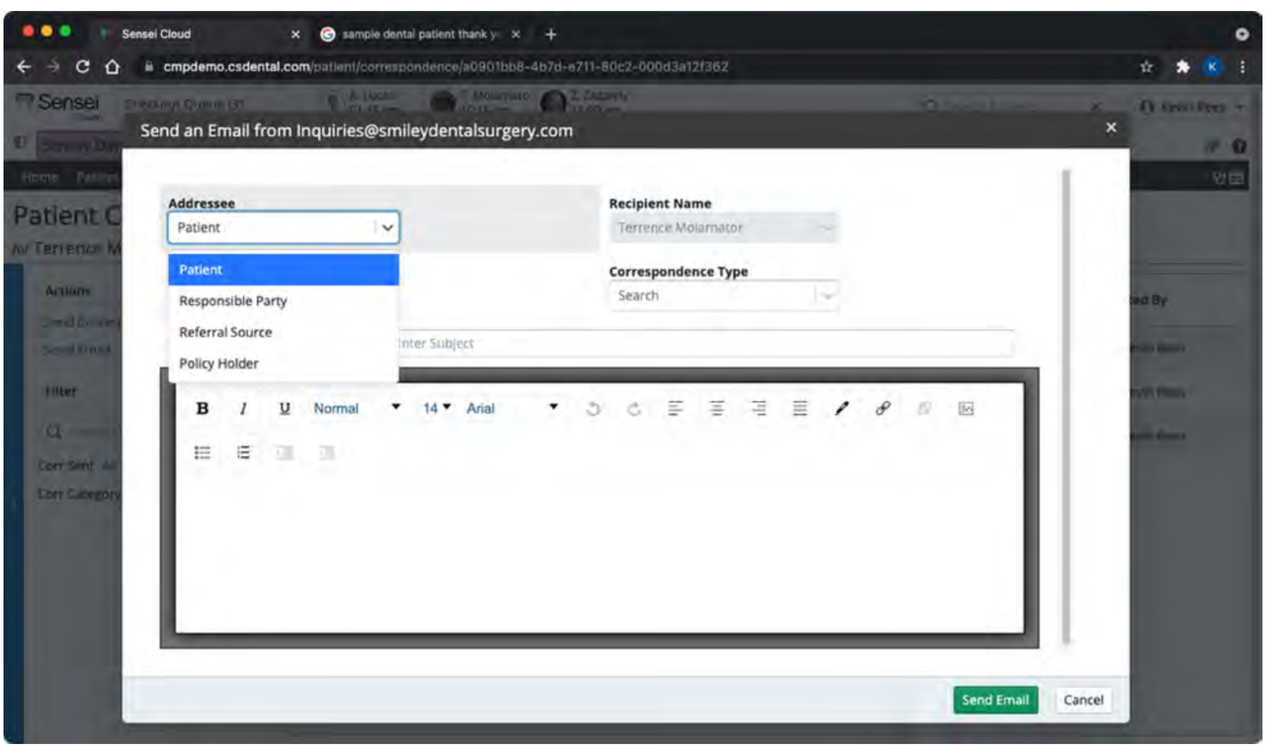
Send Emails To (or About) Patients

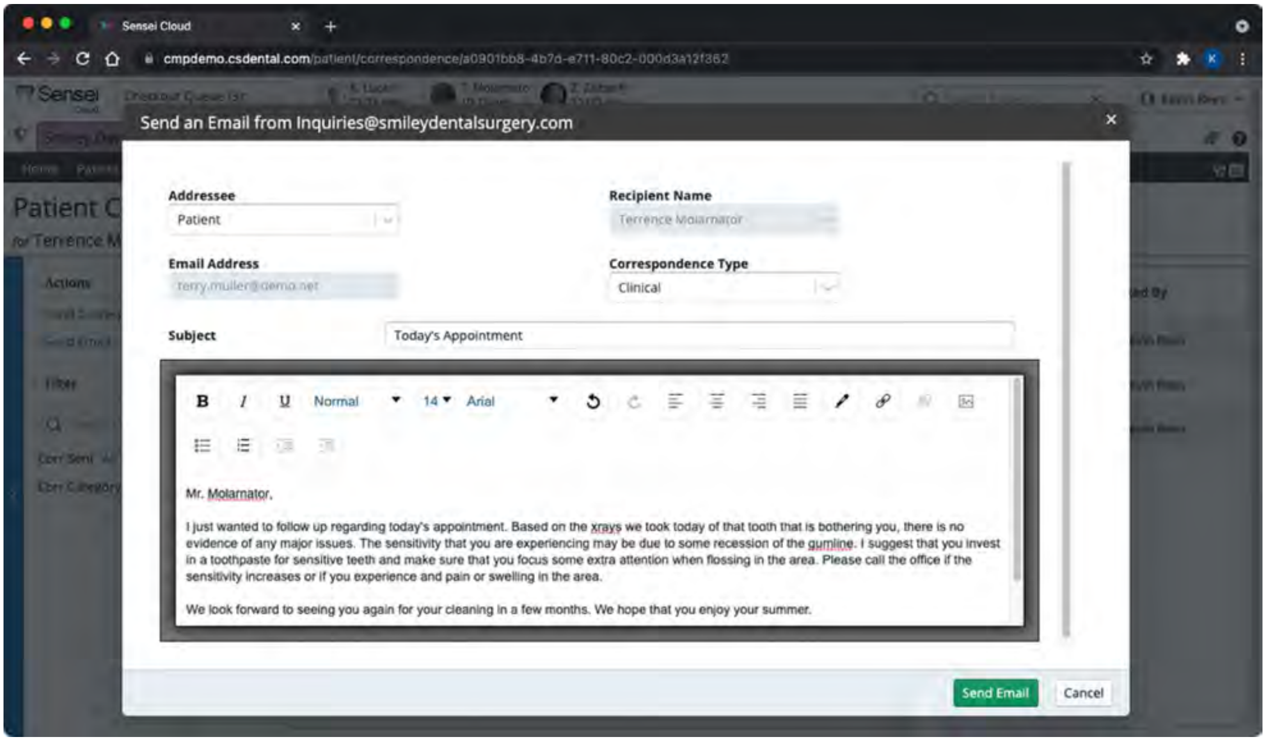
This week's release enables you to quickly send ad-hoc emails to (or about) a patient. With this update, the patient's email address is now a clickable action wherever it is displayed. Click on the patient's email or any of the 'Send Email' actions throughout Sensei Cloud (e.g., Patient Tab > Home OR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



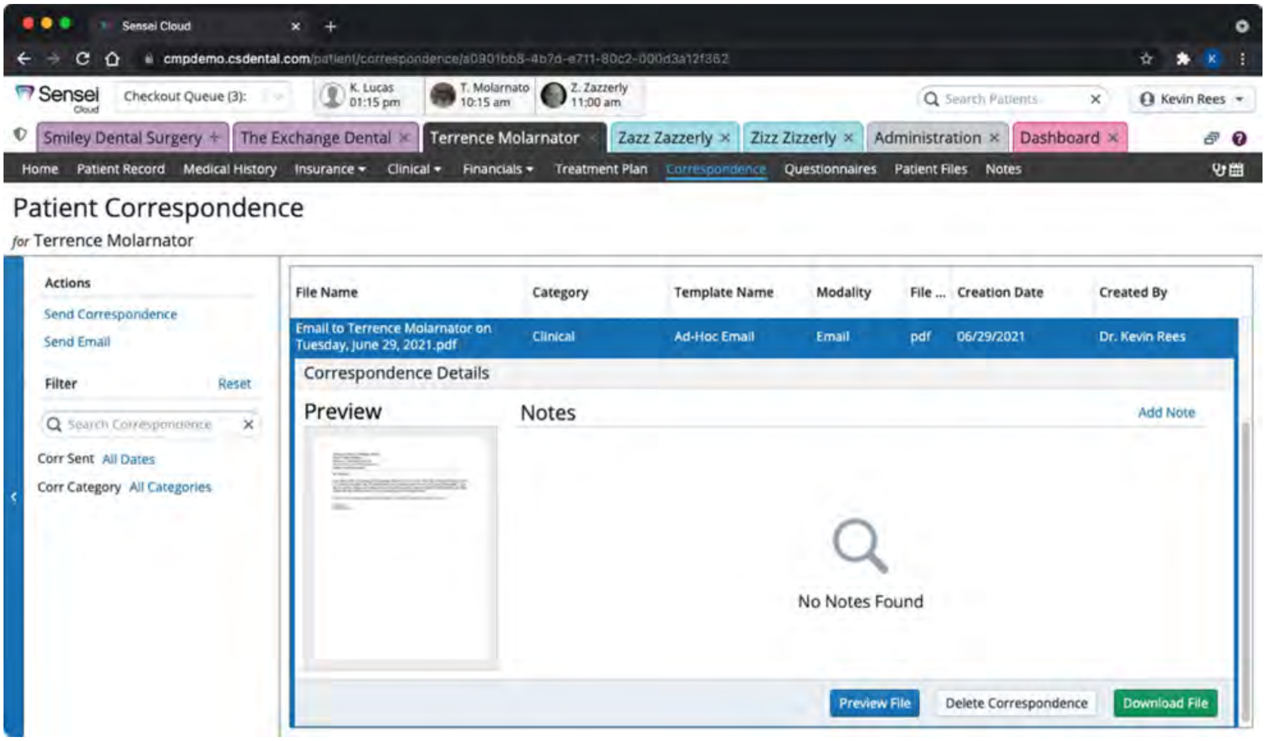


From the ‘Send an Email’ dialog, first select an addressee type. While Sensei Cloud defaults to ‘patient’, you can choose to direct the email to any of the patient’s active responsible parties, referral sources, or (insurance) policyholders. The available recipients are based on those defined in the 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.





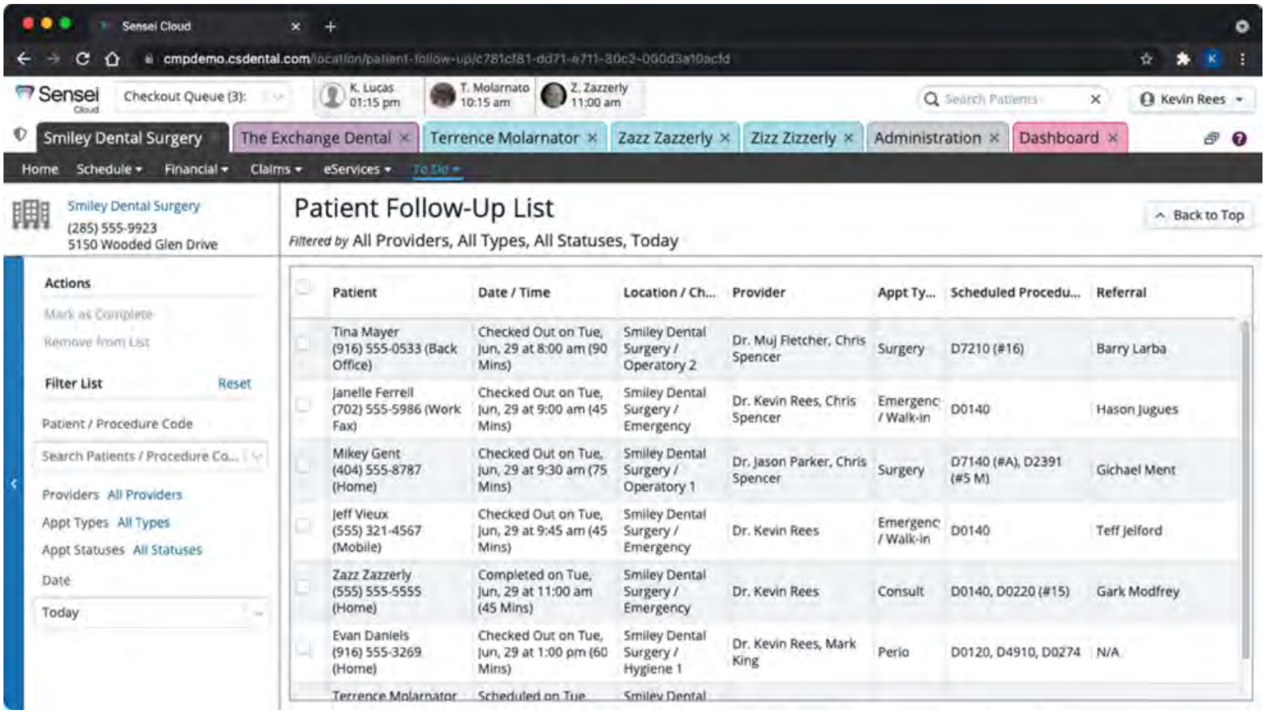
Finally, enter a subject and compose your message. Rich text formatting controls are available to create a professionally constructed message, including standard font styling and layout tools as well as the ability to insert images (e.g., your practice logo). Once complete, click ‘Send Email’. A .pdf 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).



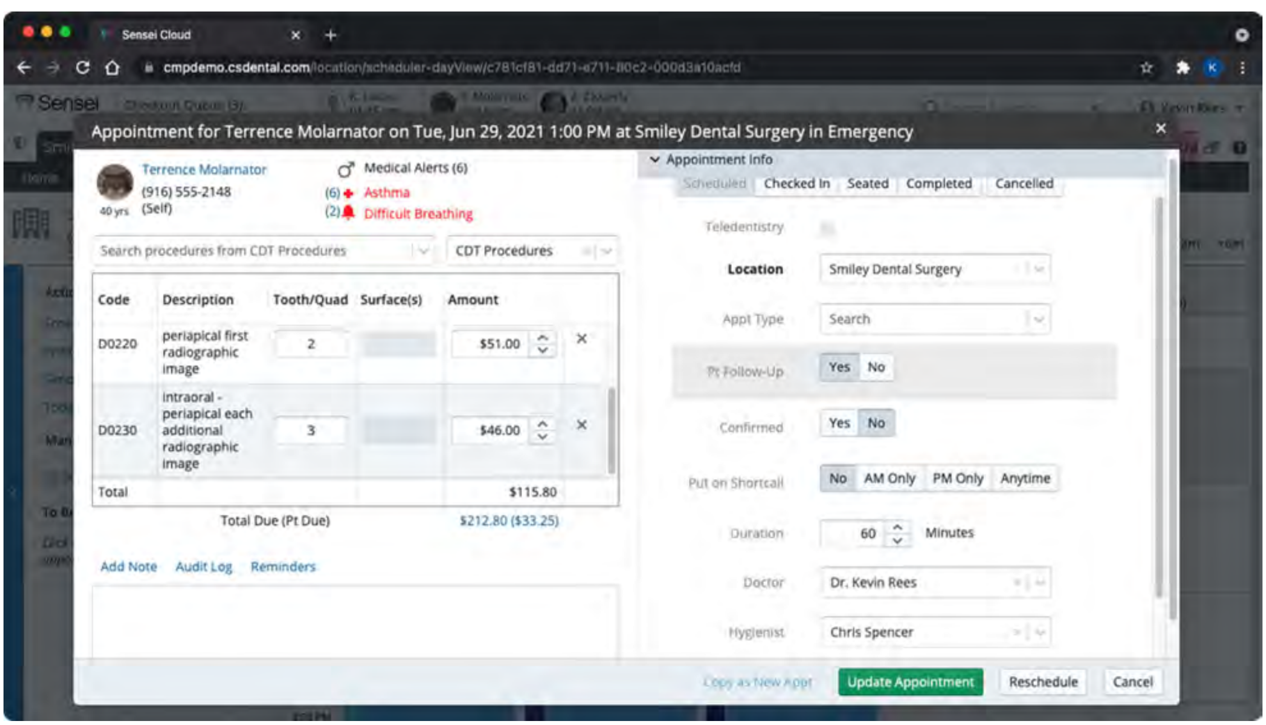
We hope that these new email capabilities improve your patient communication workflows. We look forward to your feedback on this new functionality and what else can be improved.

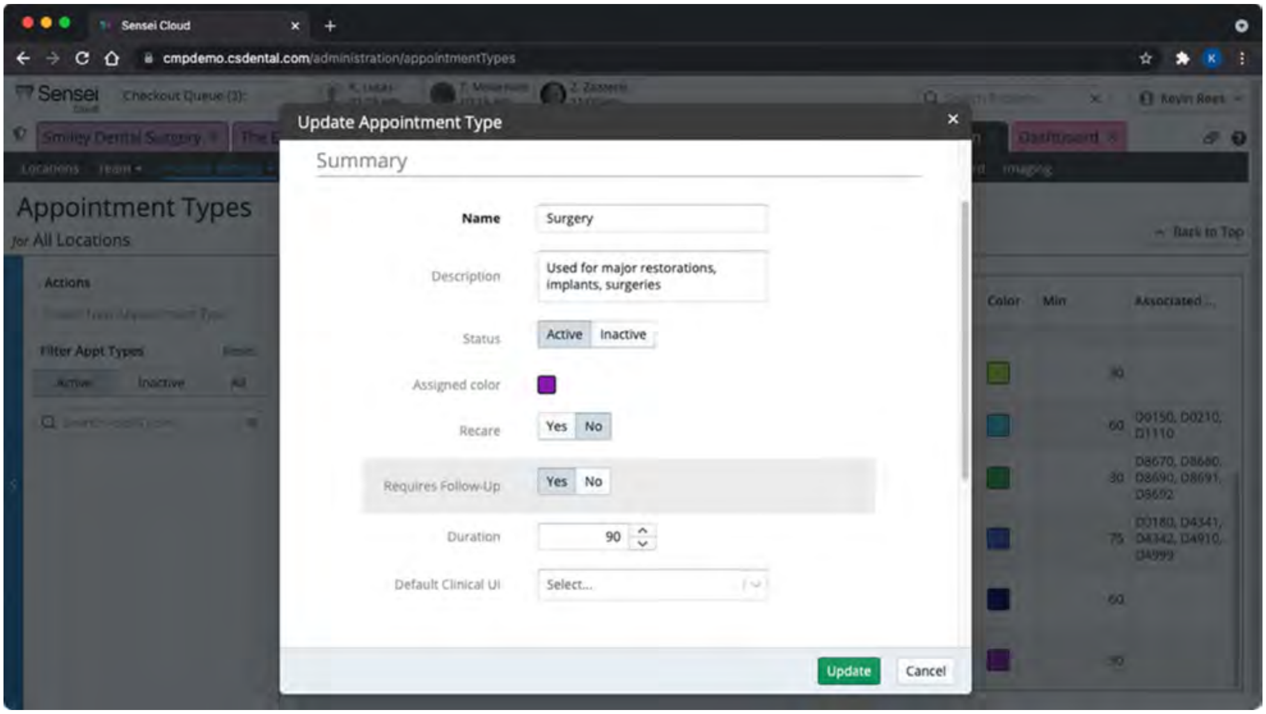
Patient Follow-Up Worklist (Night Call)

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.

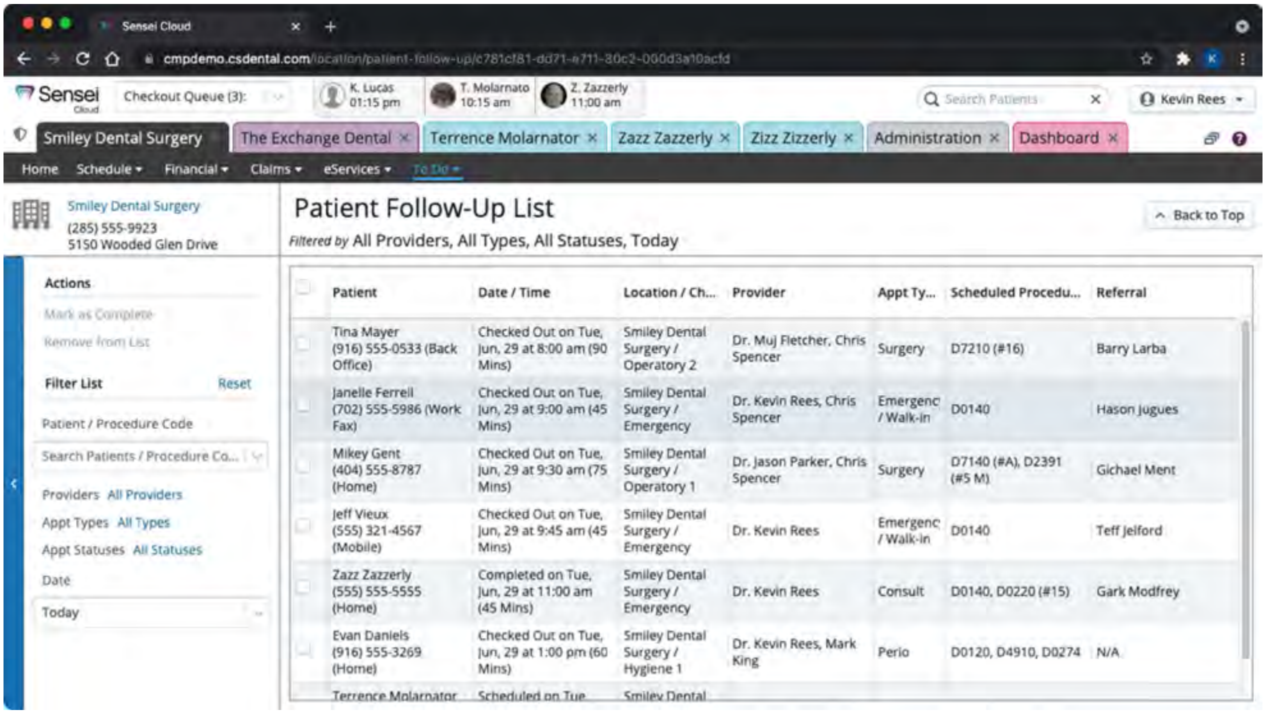


Click ‘Yes’ for ‘Pt Follow-Up’ in the Appointment Card when creating or managing an existing appointment to flag it as requiring follow-up. Alternatively, if your practice uses appointment types when scheduling, then click ‘Yes’ for ‘Requires Follow-Up’ when creating or updating an appointment type [Administration 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.

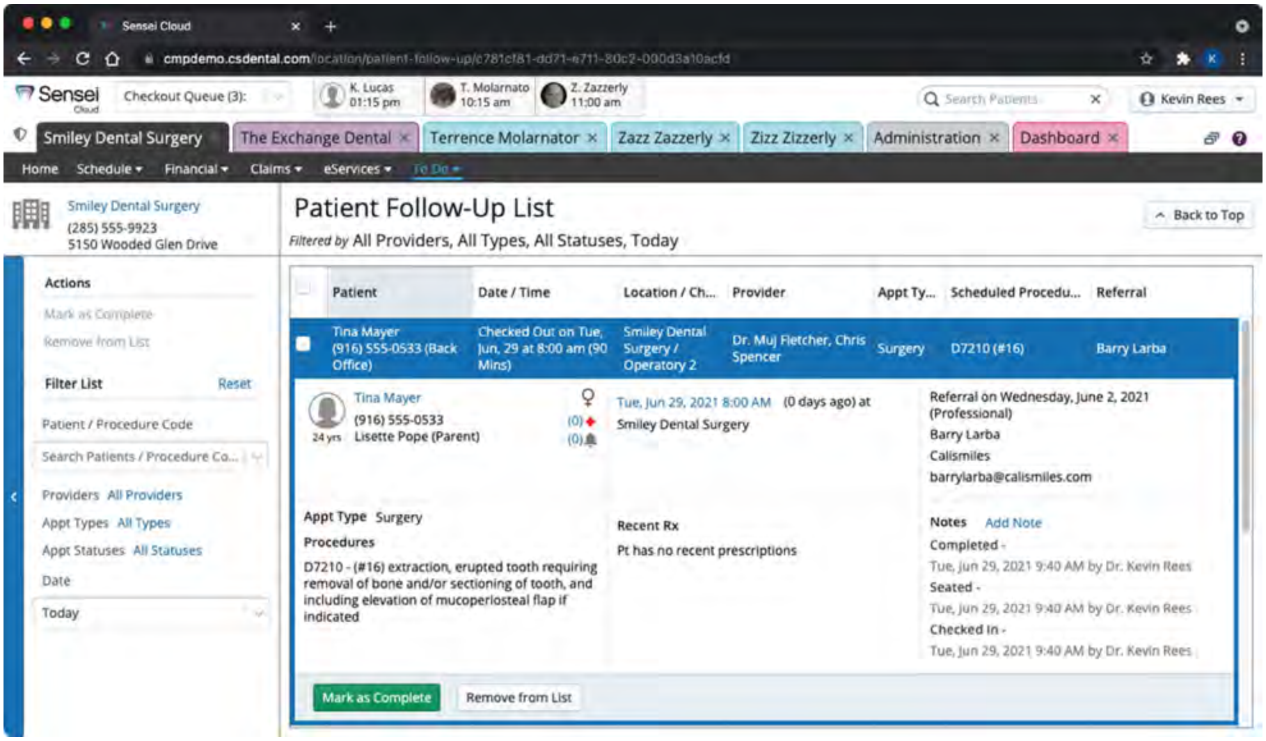


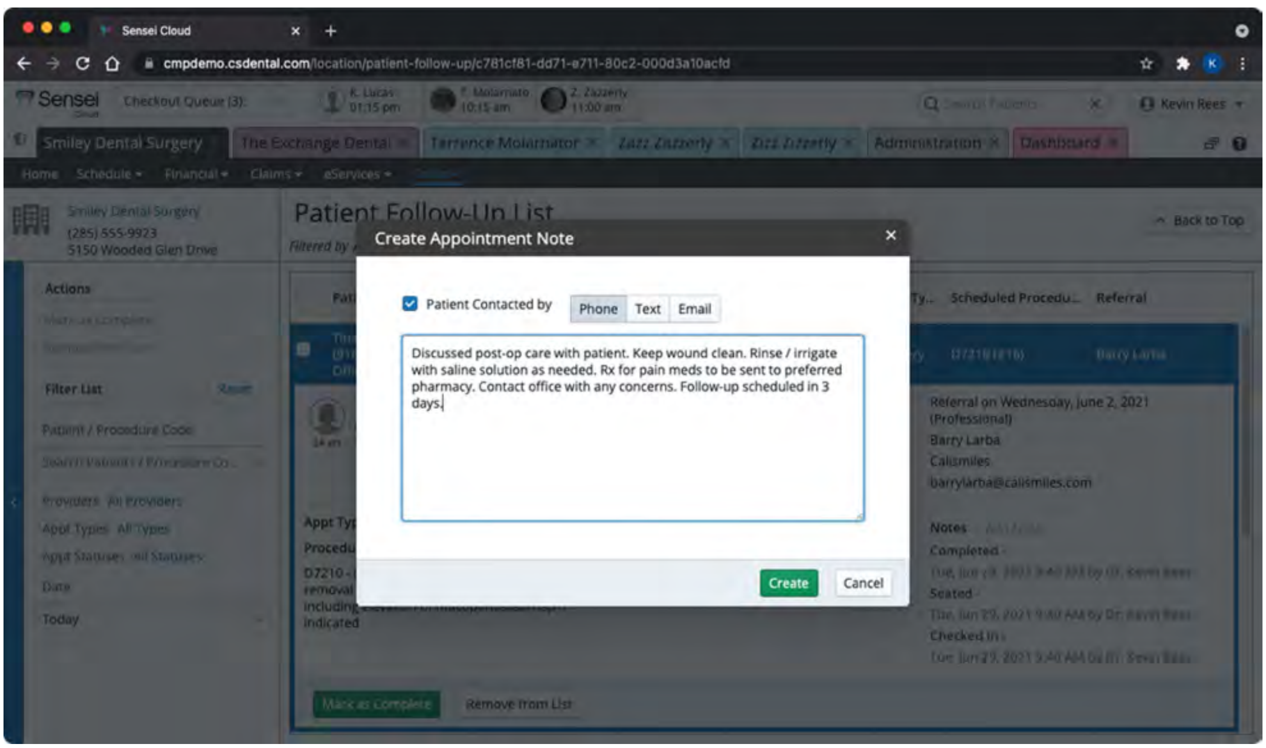


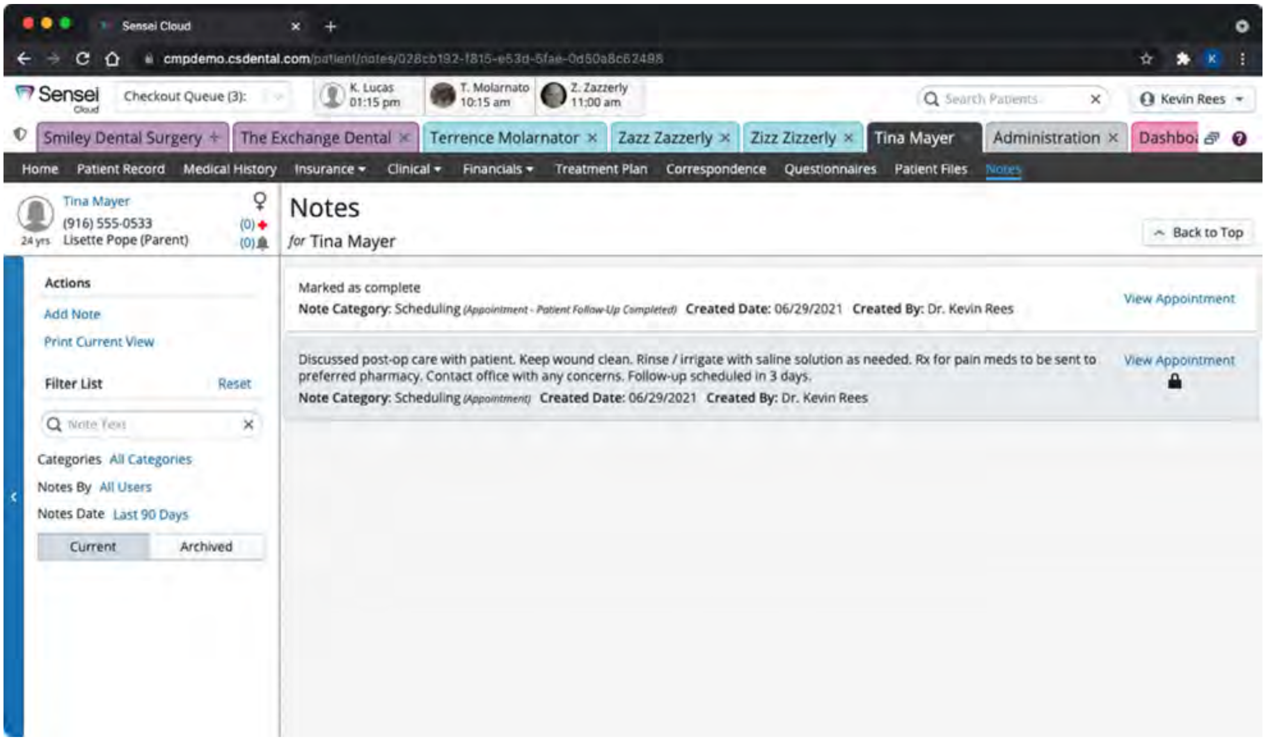
Appointments that have been flagged as requiring follow-up are automatically added to the new 'Patient Follow-Up List' [Location Tab > To Do > Patient Follow-Up List]. By default, the worklist displays all (flagged) appointments from the current day, following their scheduled end time. There are several 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.



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 patent'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.csdental.com/location/patient-follow-up/c781cf81-dd71-e711-80c2-000d3a10acfd
Sensei
Checkout Queue (3):
K. Lucas
01:15 pm
T. Molarnato
10:15 am
Z. Zazzerly
11:00 am
Search Patients
Kevin Rees
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
Back to Top
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
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
Tina Mayer
(916) 555-0533
Lisette Pope (Parent)
24 yrs
Tue, Jun 29, 2021 8:00 AM (0 days ago) at
Smiley Dental Surgery
Referral on Wednesday, June 2, 2021 (Professional)
Barry Larba
Calismiles
barrylarba@calismiles.com
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.csdental.com/location/patient-follow-up/c781cf81-dd71-e711-80c2-000d3a10acfd
Patient Follow-Up 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]

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