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Sensei Cloud Release 0.1.6534 (Part 2)

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.

[0.1.6534 RELEASE UPDATES CONTINUED FROM PART 1]

Clinical Note Enhancements

This week's release includes significant updates to clinical notes, which now include support for rich text formatting and use of templates for all clinical notes. You can now apply rich text formatting to both template-based and free-form clinical notes, providing more flexibility in how you document patient

care. These enhancements apply to both day-based clinical notes and those notes added as additional detail to clinical events (e.g., observed issues or planned procedures). Additionally, this applies to all clinical contexts including the Hard Tissue Chart, Treatment Chart, Soft Tissue Chart, Perio Chart, Orthodontic Clinical Summary, and Treatment Plan screens [Patient Tab > Clinical > ...]. NOTE: This does not currently apply to the standard Watch and Chief Concern clinical events, as these note-based items already have established formatting.
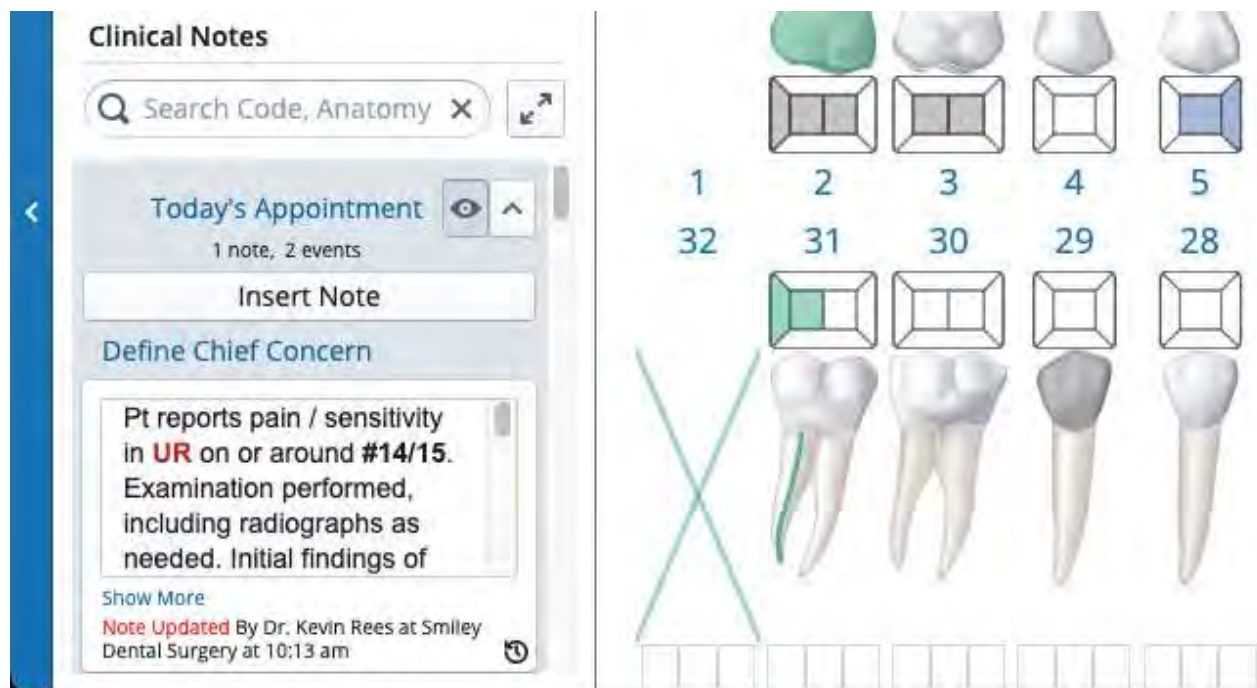

The clinical note template functionality has been enhanced, including the ability to apply rich text formatting to your templates [Administration Tab > Templates > Clinical Note Templates]. Enter a (unique) short, recognizable name for the template so it can be easily identified when creating new clinical notes. Select a category to make the template easier to find when both managing templates or when using it in the construction of new clinical notes. NOTE: Sensei Cloud comes pre-populated with categories; you can edit existing categories and create new ones as needed. Mark 'Yes' for 'Is My Favorite' (or click the 'Star') to ensure that the template is promoted when creating new clinical notes. Finally create your clinical note template, using the new rich text formatting tools to structure and visually style the note text to your specifications. NOTE: Additional rich text formatting controls have been

added, including text highlighting, bullets, numbered lists, and indenting, which are also available for correspondence templates [Administration Tab > Templates > Correspondence Templates].
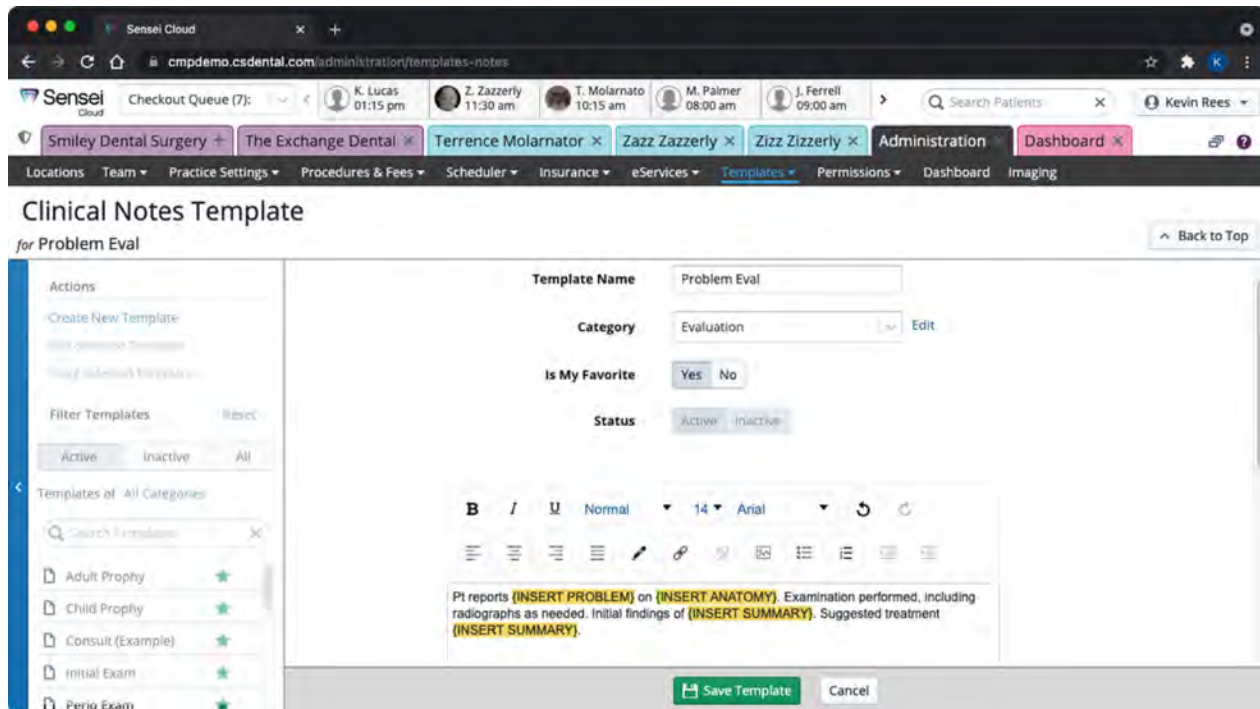

The clinical note tools have been simplified, providing a single experience when documenting patient care. In the Hard Tissue Chart, click 'Insert Note' on a given date block to create a new day-based clinical note. Additionally, you can hover over an existing clinical event (e.g., observed condition or planned / completed procedure) and click 'Insert Note' to create a new event-based clinical note. Similarly, click the 'Insert Note' link in the Soft Tissue Exam or the Perio exam to enter exam-based clinical notes. NOTE: Upcoming enhancements to the Treatment Chart will also help to standardize the clinical note experience for practices that use this screen [Patient Tab > Clinical > Treatment Chart].
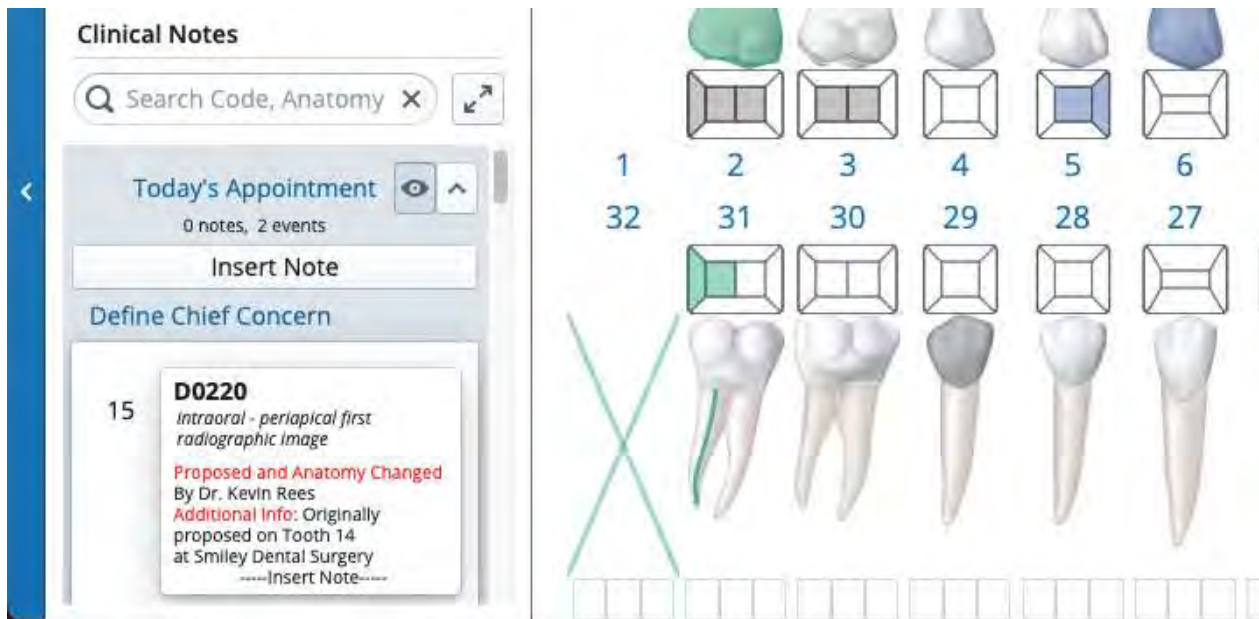
The new clinical note dialog displays, allowing you to search for and select from existing (clinical note) templates or simply enter free-form note text. Click on a template to preview its contents before inserting the text into your new note. Once added, template text can be modified or supplemented prior to saving your clinical note. Use the rich text formatting tools to style and lay out the clinical note text, according to your needs. Finally, click 'Save' to add your new clinical note to the patient's clinical history. NOTE: You can use multiple templates within a single clinical note. The selected template text will be inserted at the current cursor position.
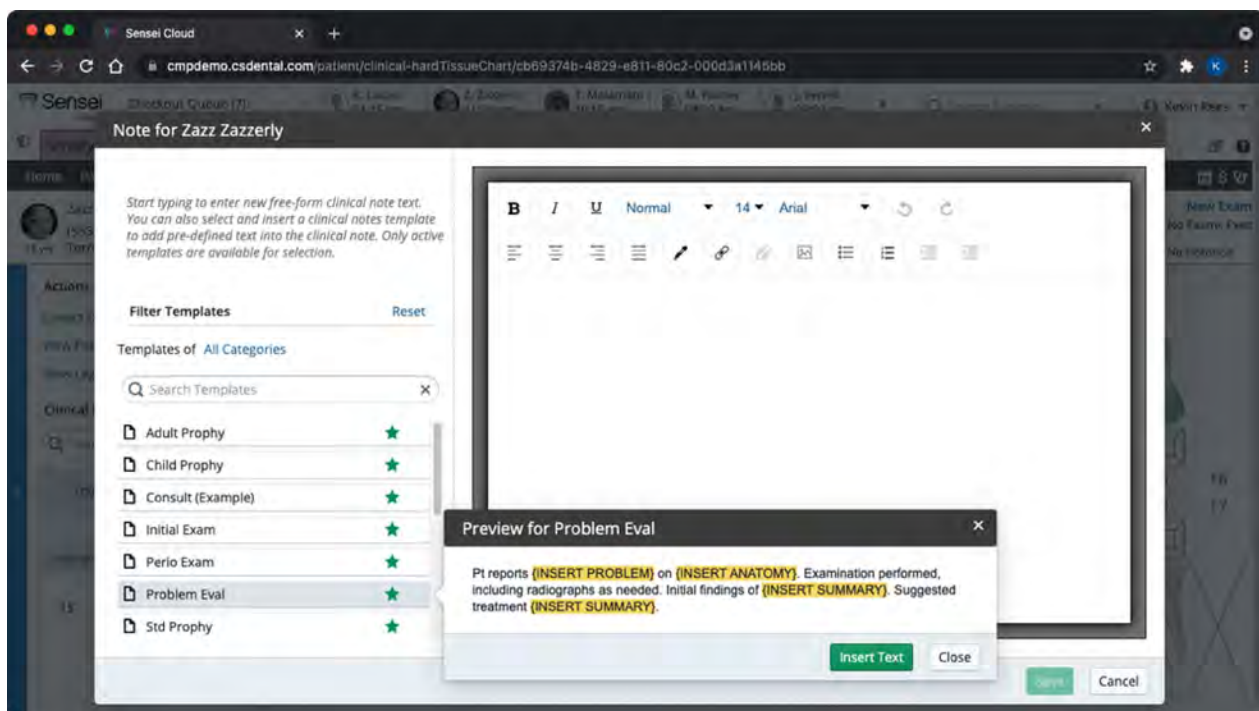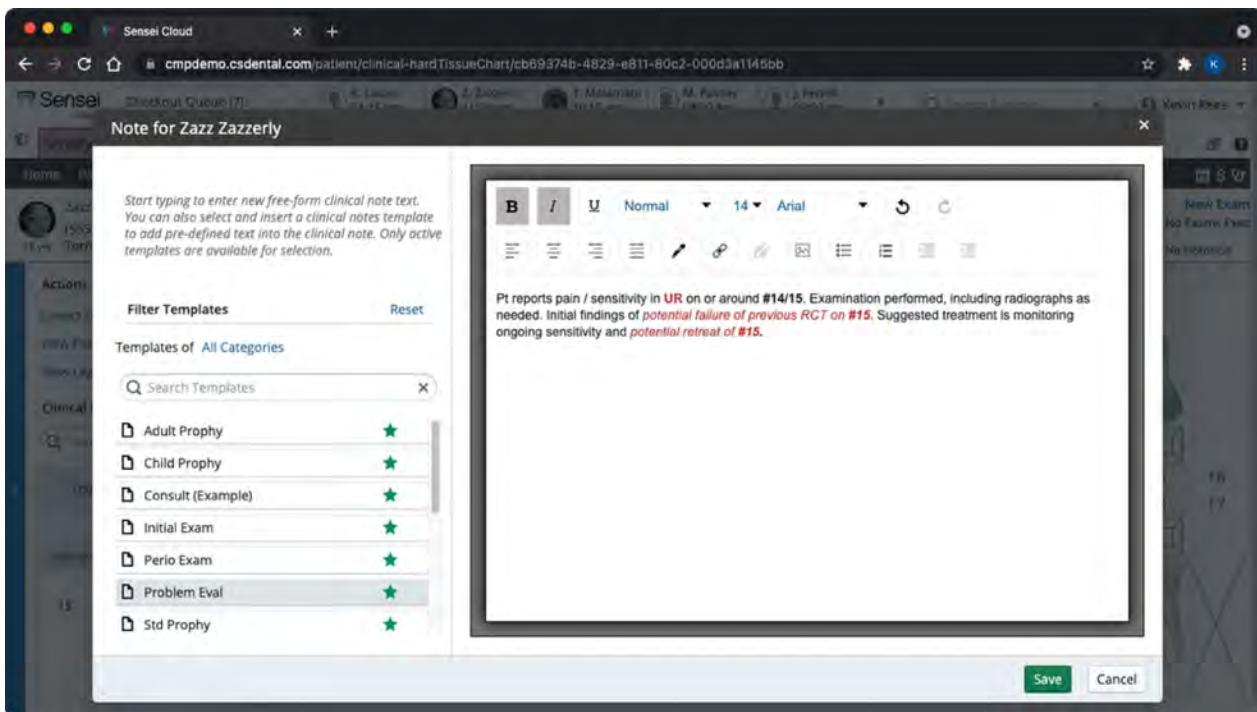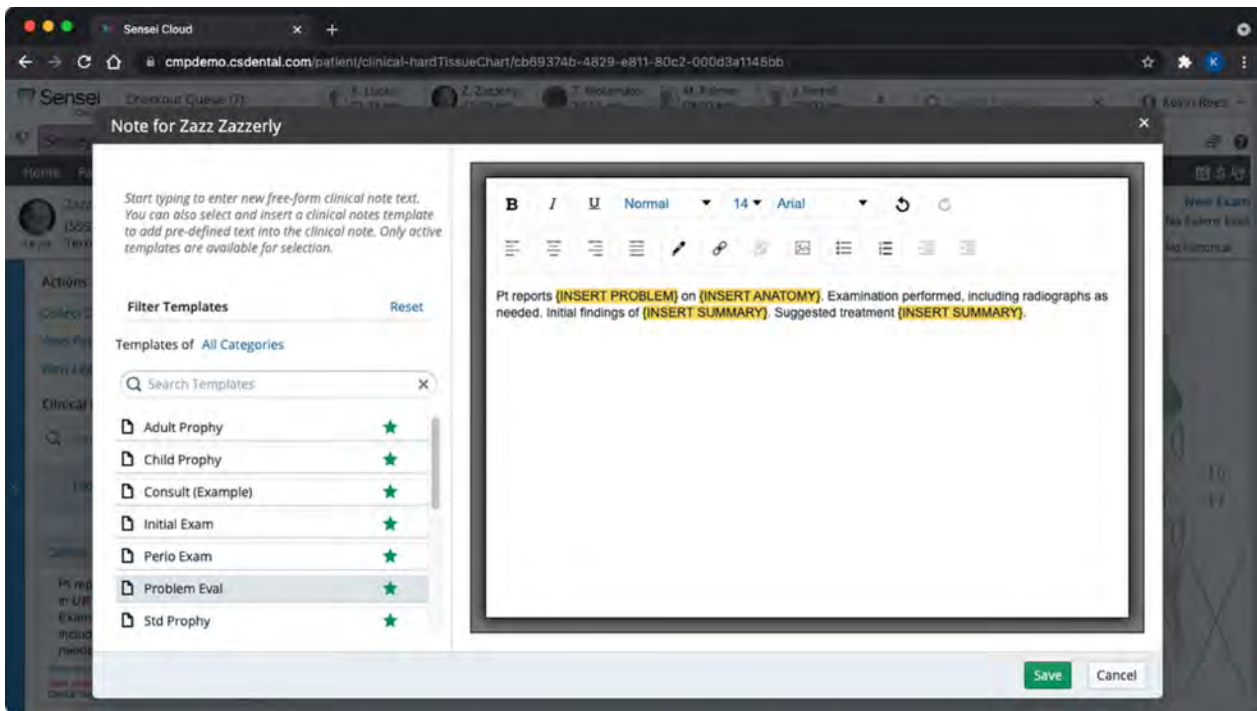
The clinical event note, including any formatting, will now be visible in the patient's clinical history. To help ensure that a reasonable window of the patient's clinical history is visible at any time, longer clinical notes will be automatically visually truncated within clinical views. You can scroll within the clinical note's container or click 'Show More' to view a popover with a larger view of the full clinical note text. NOTE: This applies to all clinical contexts, with the amount of the clinical note displayed by default optimized to the physical constraints of the screen.
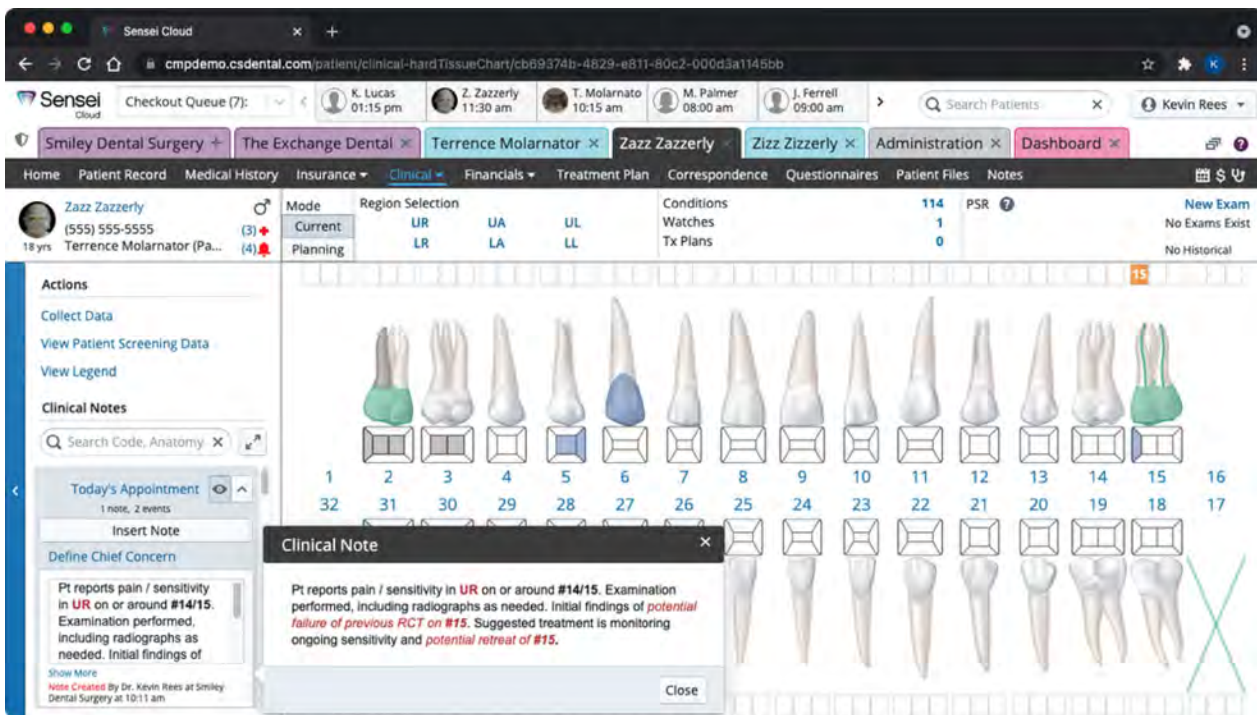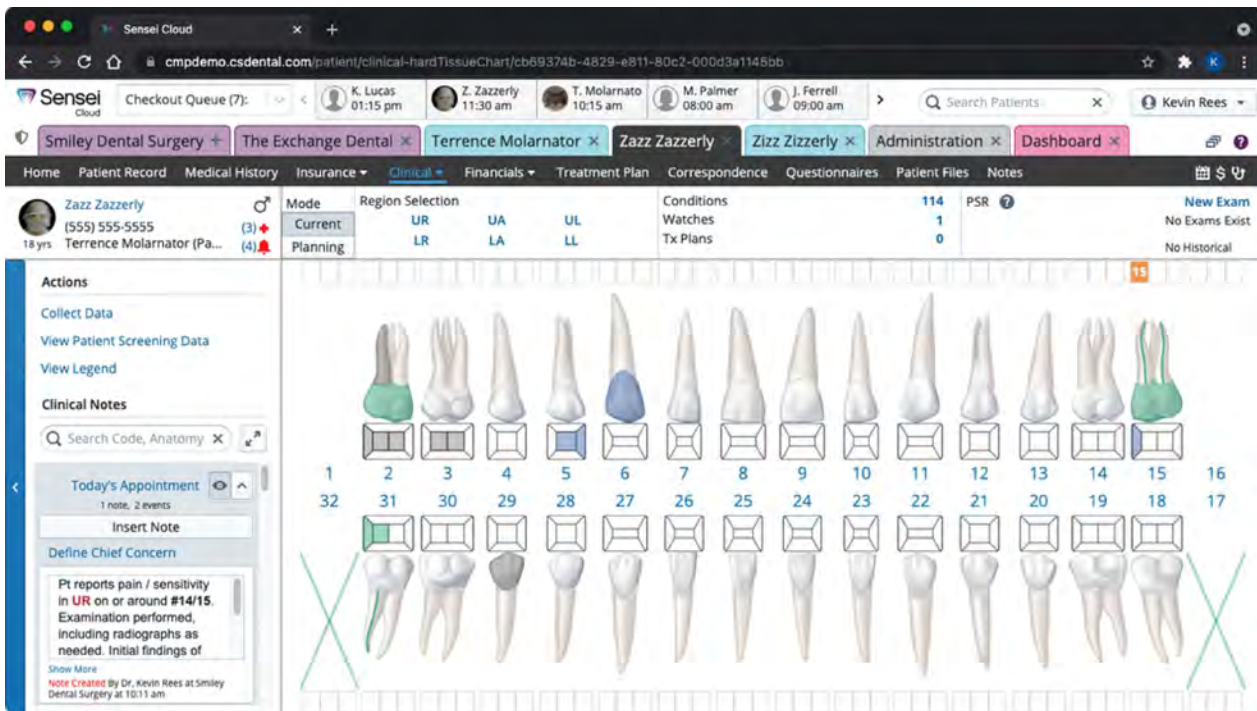
As with the existing clinical notes functionality, notes can be edited (pencil) or removed (x) by clicking on the associated control when hovering over the note text. The latest state of the clinical note text is displayed by default, with any changes captured in the audit trail details for an existing note. Click on the 'history' icon to display a popover with the history of the changes made to a clinical note. From here, you can click 'View Full History' to view a "transcript" of the changes to the clinical note, including all of its versions. NOTE: Any
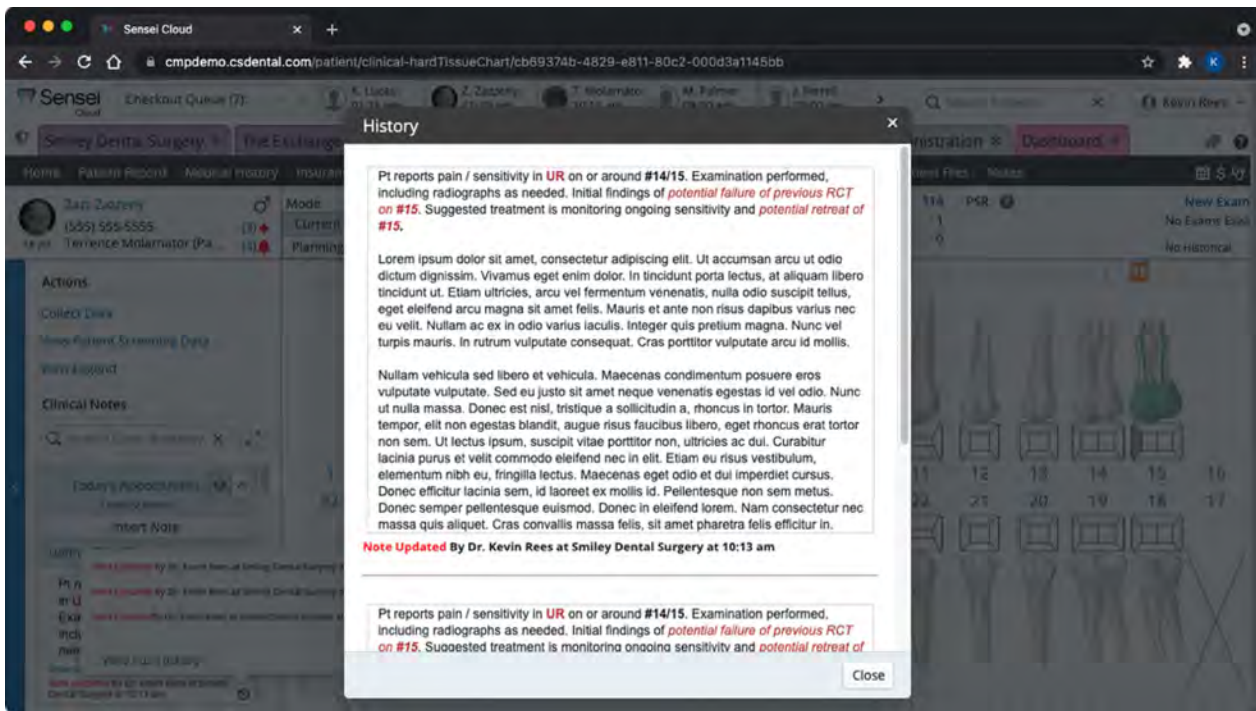
accidental modifications to an existing clinical note can be immediately reversed using the 'Undo' option available in the notification displayed following one of these actions.

We hope that these enhancements improve your clinical documentation workflows. Please send us your feedback on what works well and what additional improvements are needed.

Chart Enhancements - Representing Materials

This week's release includes enhancements to the Hard Tissue Chart, based on customer requests [Patient Tab > Clinical > Hard Tissue Chart]. With this update, you can more quickly and easily interpret the odontogram, distinguishing the patient's restorations, appliances, and procedures by associated material. Those clinical events that have an associated material (e.g., crowns, inlays / onlays, etc.) are now visually represented in color, based on their material (e.g., resin-based composite, noble / precious metal).

You can now assign a material when creating or editing a procedure [Administration Tab > Procedures & Fees > Procedure List & Fee Schedule]. Once the 'Treatment Type' is specified for the procedure (or fixed based on association with an authority code, such as a CDT code), the 'Material Type' field is displayed and you can select an applicable value. NOTE: The 'Material Type' field is only available when the selected 'Treatment Type' is associated with tooth-based anatomy. Once you select the material, the associated color

representing it is displayed next to the field. By default, no material is assigned to a new procedure and, when charted, it will continue to be visually represented using Sensei Cloud's pre-existing defaults (e.g., 'green' for existing items, 'blue' for completed work, and 'red' for planned procedures). NOTE: The material-color mappings used in Sensei Cloud are fixed. You are not able to modify the color assigned to a material.
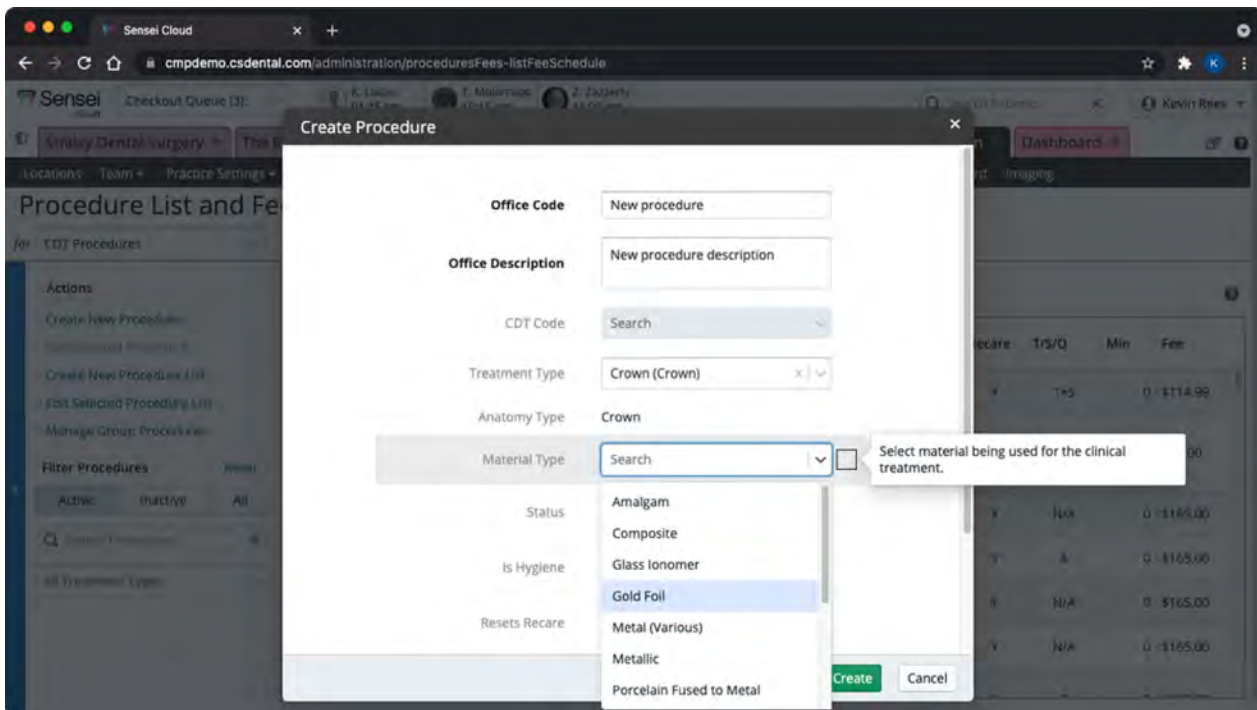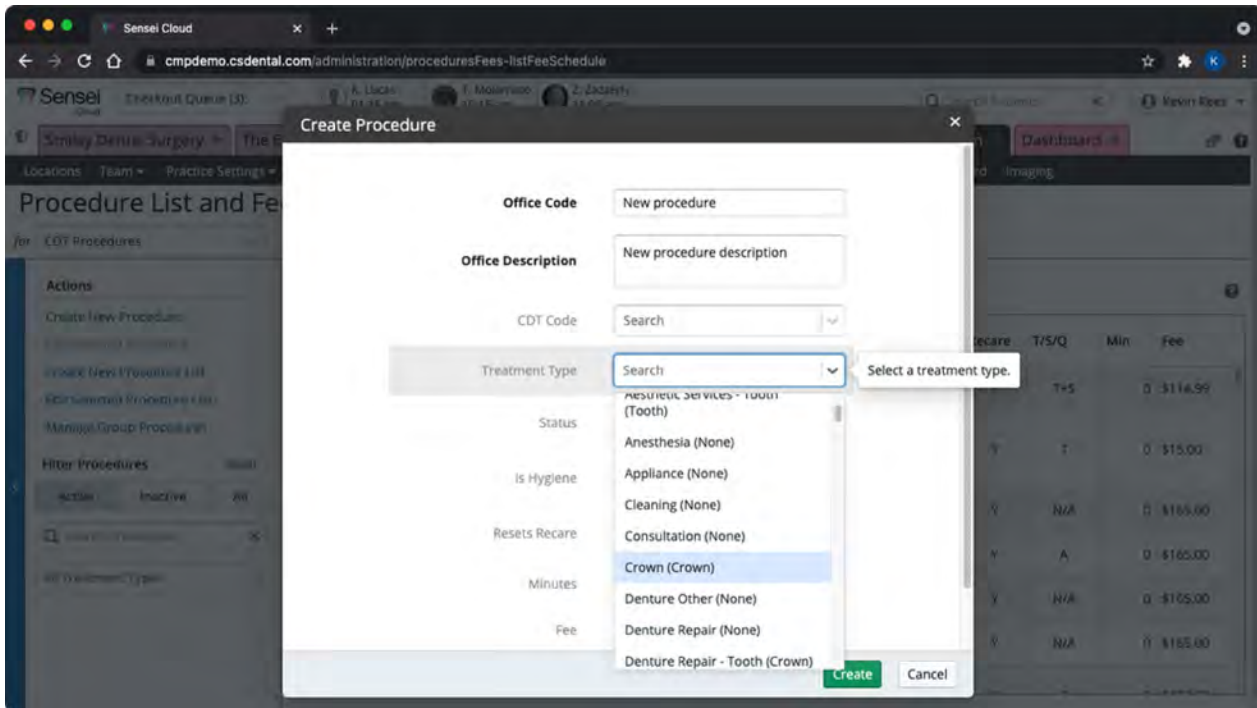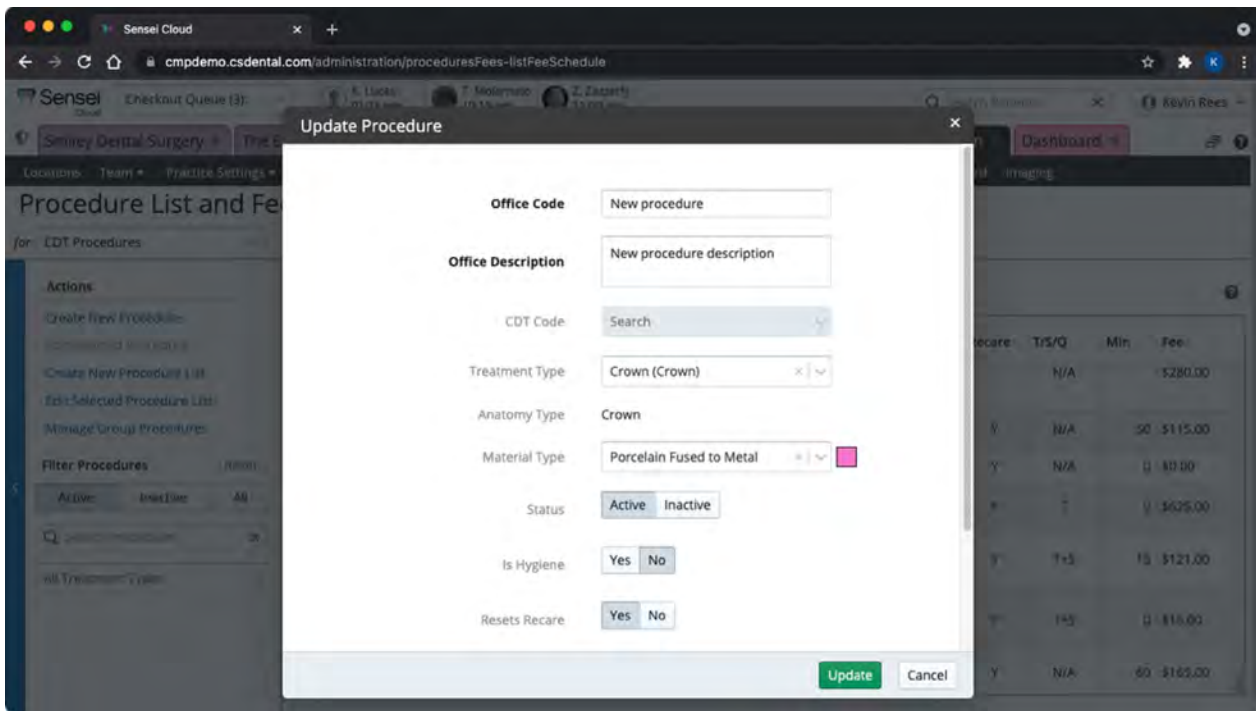
IMPORTANT: As part of this update, materials have been automatically associated with existing procedures, where appropriate. For US customers, your existing procedures based on associated CDT codes have been converted / updated with the associated material. NOTE: These procedure-material mappings cannot be updated to prevent possible confusion caused by mistakes made during manual configuration of procedures. For UK customers, your existing NHS procedures have been converted / updated with the associated material. NOTE: These procedure-material mappings can be updated, as the procedure descriptions themselves are editable. For both US and UK customers, any private or unbillable (to US insurance) procedures do not have an assigned material. You can edit these associations via the Procedure List and Fee Schedule, as previously described.
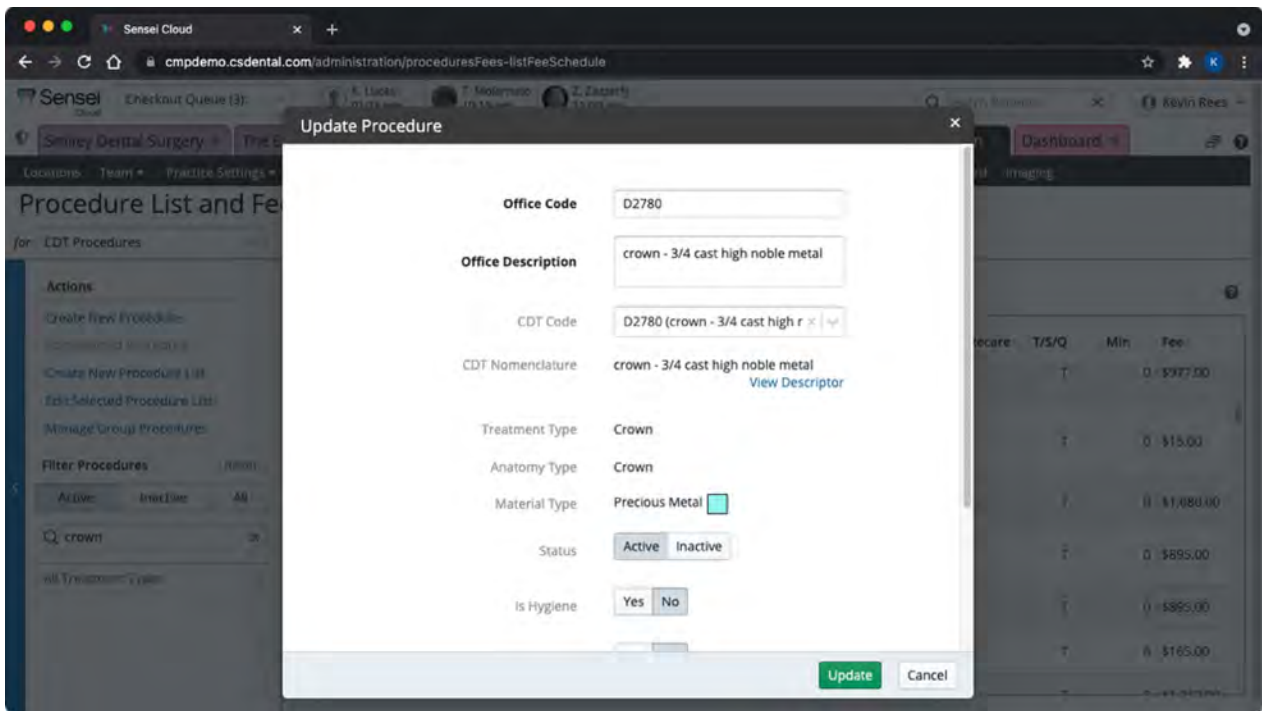
For those procedures that are visually represented when charted, they are now represented in their material's color in the odontogram [Patient Tab > Clinical > Hard Tissue Chart]. As previously noted, any procedures or clinical events that do not have an assigned material (or for which material does not apply) will continue to be represented with the standard green (existing), blue (completed), and red (planned) visual markup language. Additionally, planned procedures are now visually represented with an outline of the associated anatomy when charted, as opposed to the 'fill' used for existing and completed work. The chart's legend has also been updated to include the material-based color mappings and associated changes. Click 'View Legend' to review and assist while you learn the new visual markup language of the Hard Tissue Chart.
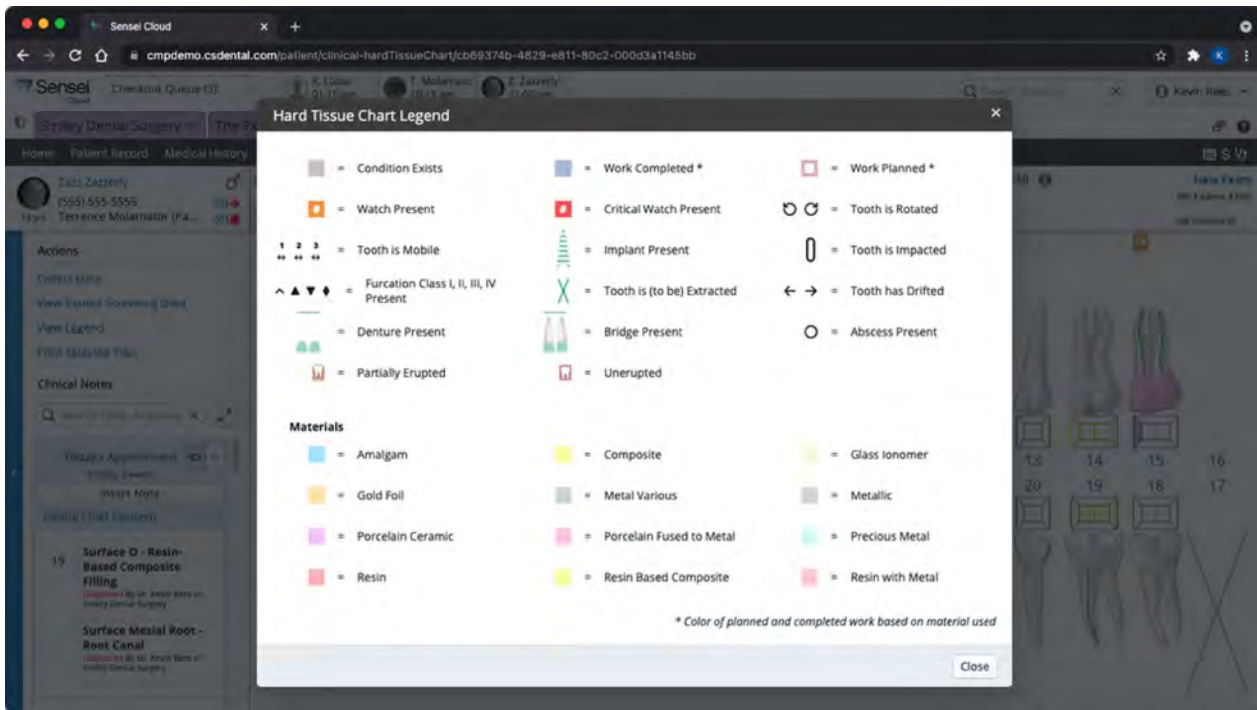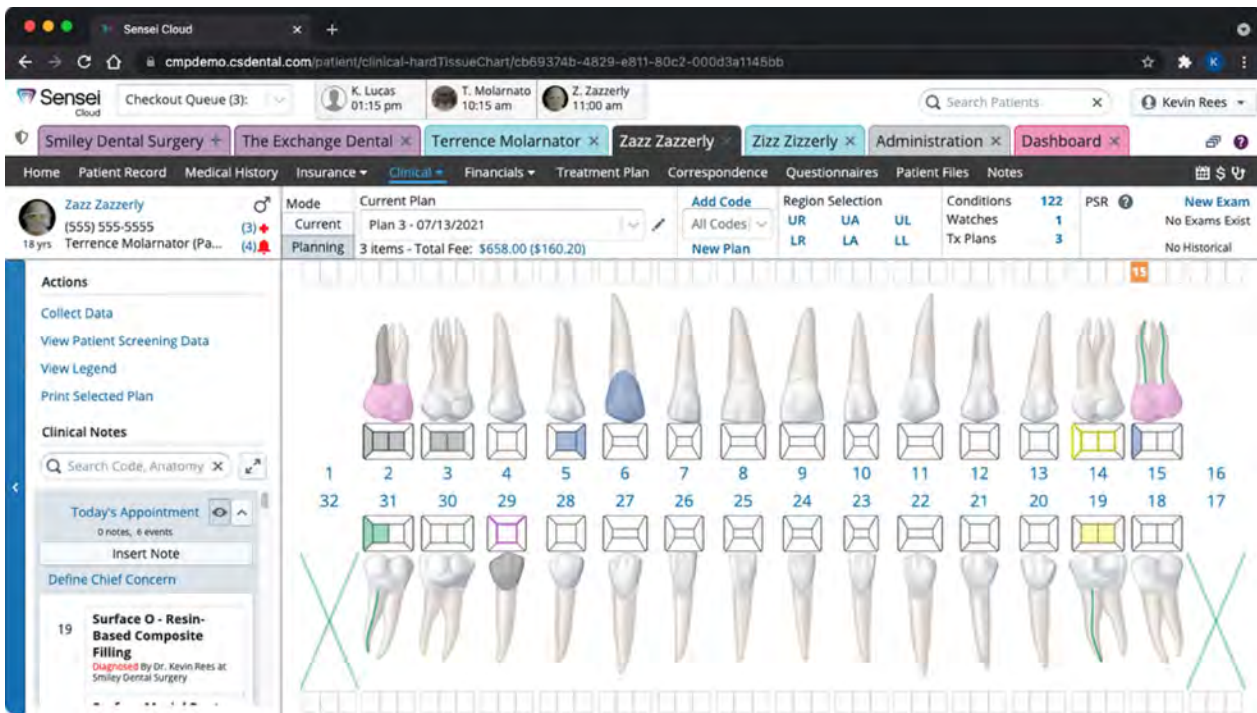
We are excited to deliver this widely-requested enhancement to Sensei Cloud's charting functionality. We look forward to your feedback on what works well and what additional improvements can be made in support of your clinical documentation workflows.

[0.1.6534 RELEASE UPDATES CONTINUED ON PART 3]

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