



Search all content

The Exchange > Sensei Cloud > SENSEI CLOUD > Sensei Cloud Release 0.1.6678 (Part 2)



MOD kevin_moloney

Moderator



08-23-2021 09:32 PM

Sensei Cloud Release 0.1.6678 (Part 2)

Sensei Cloud

Weekly Release

Build 0.1.6678 | August 24th, 2021

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

[0.1.6678 RELEASE UPDATES CONTINUED FROM PART 1]

Custom Discount and Write-Offs

Sensei Cloud now supports the creation and management of custom Discount and Write-Offs types that can be used when posting financial adjustments. Any new custom types that you create of these adjustments can be used whenever posting balance adjustments via the Patient Ledger [Patient Tab > Financials >

Ledger] or the Accounts Receivable worklist [Location Tab > Financial > Accounts Receivable], or when posting discounts as part of the formalization of an orthodontic contract [Patient Tab > Financials > Contracts].

To create a new discount or write-off type, click 'Edit' next to the associated selection control within the applicable dialog (e.g., 'Discount Type' or 'Write-Off Type'). This displays the 'Manage [Discounts / Write-Offs]' dialog, which enables you to create and manage the custom adjustment types. From here, click 'Add New' and specify a unique name for the discount or write-off and then click 'Save' (e.g., the checkmark) to add the new adjustment type.

Alternatively, click on the 'pencil' next to an existing item to edit the discount or write-off. As noted in the dialog, any edits made to existing discount & write-off types (such as a label / name change) will be automatically reflected throughout Sensei Cloud. Deactivating a discount or write-off type will prevent its future use, but will not impact existing transactions that have been posted.

NOTE: You cannot edit or deactivate the stock discount and write-off types provided with Sensei Cloud. However, you have full control over any custom adjustment types that you create.

Terrence Molarnator - Adjust Balance

Please choose the type of balance adjustment you would like to make.

Discount Write-Off Refund

Apply Discount To: Total Balance (\$2,046.38), Today's Balance (\$0.00)

Provider: Search

Location: Smiley Dental Surgery

Discount Type: Courtesy Discount Edit

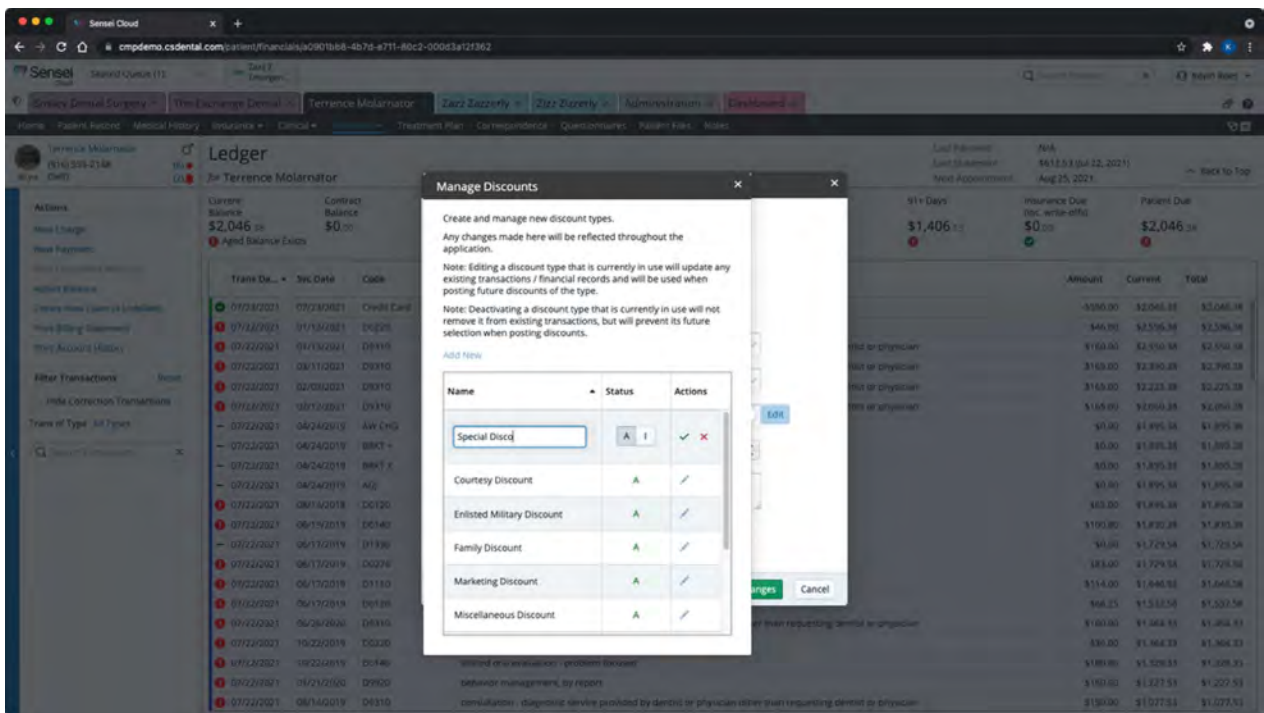
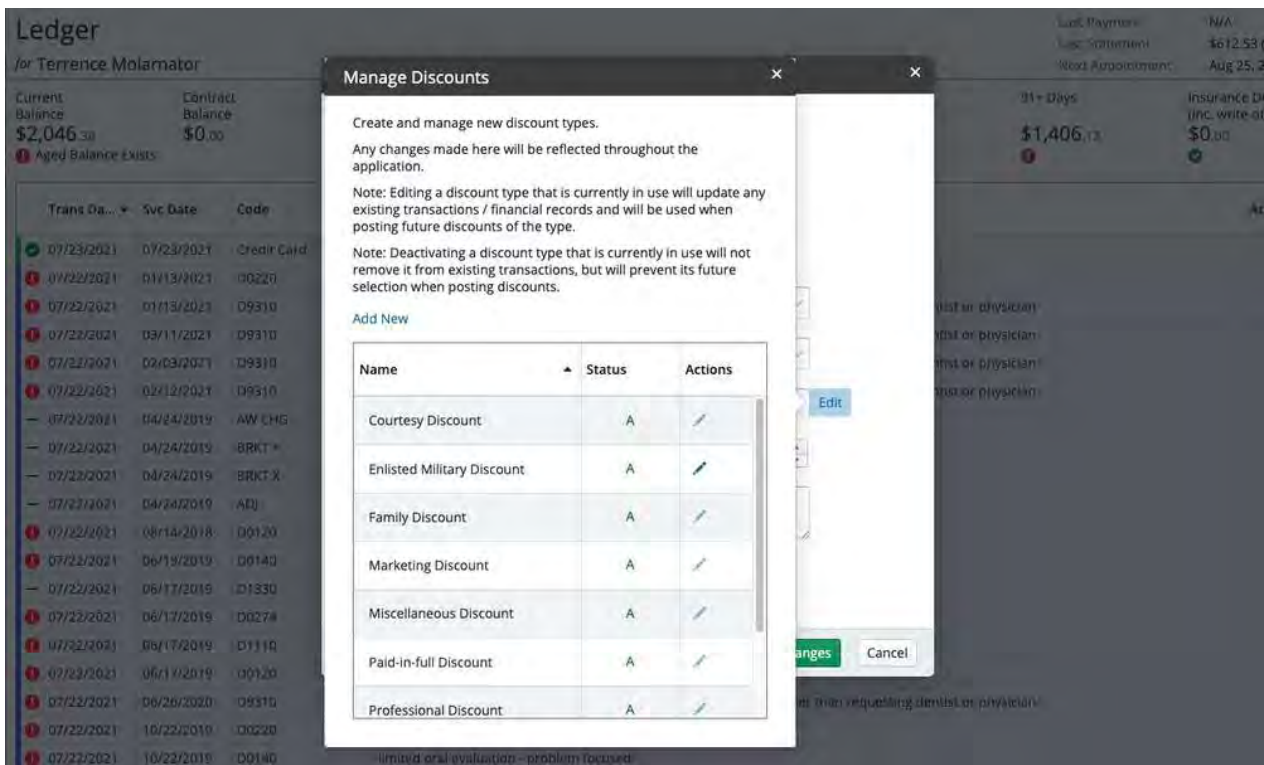
Discount Amount: \$0.00, 0%

Comments

Adjusted Balance: \$2,046.38

Save Changes Cancel

| Amount | Current | Total |
|-----------|------------|------------|
| -\$550.00 | \$2,046.38 | \$2,046.38 |
| \$46.00 | \$2,596.38 | \$2,596.38 |
| \$160.00 | \$2,550.38 | \$2,550.38 |
| \$165.00 | \$2,390.38 | \$2,390.38 |
| \$165.00 | \$2,225.38 | \$2,225.38 |
| \$165.00 | \$2,060.38 | \$2,060.38 |
| \$0.00 | \$1,895.38 | \$1,895.38 |
| \$0.00 | \$1,895.38 | \$1,895.38 |



As previously mentioned, any active discount and write-off types created now will be available when posting financial adjustments. Simply select the desired option when posting your discount or write-off. Additionally, custom adjustment types are included in all of the existing financial reporting and are available for reviewing and filtering, as applicable. This includes the history of posted transactions in the Patient Ledger [Patient Tab > Financials > Ledger], the Financial Daysheet reporting of posted transactions [Location Tab >

Financial > Daysheet], custom Transaction List reporting [Dashboard Tab > Reports > Transaction List], and Applied Payments reporting [Location Tab > Financial > Applied Payments].

Please choose the type of balance adjustment you would like to make.

Discount Write-Off Refund

Apply Discount To: Total Balance (\$2,046.38)
Today's Balance (\$0.00)

Provider: Search

Location: Smiley Dental Surgery

Discount Type: Courtesy Discount

Discount Amount: Enlisted Military Discount, Family Discount, Marketing Discount, Miscellaneous Discount, Paid-in-full Discount, Professional Discount, Special Discount, Staff Discount

Comments

Adjusted Balance

Select the type of Discount to apply to the patient account balance. A new Discount type can also be created by entering a name in the Discount Type control.

Terrence Molarnator (916) 555-2148 (Self)

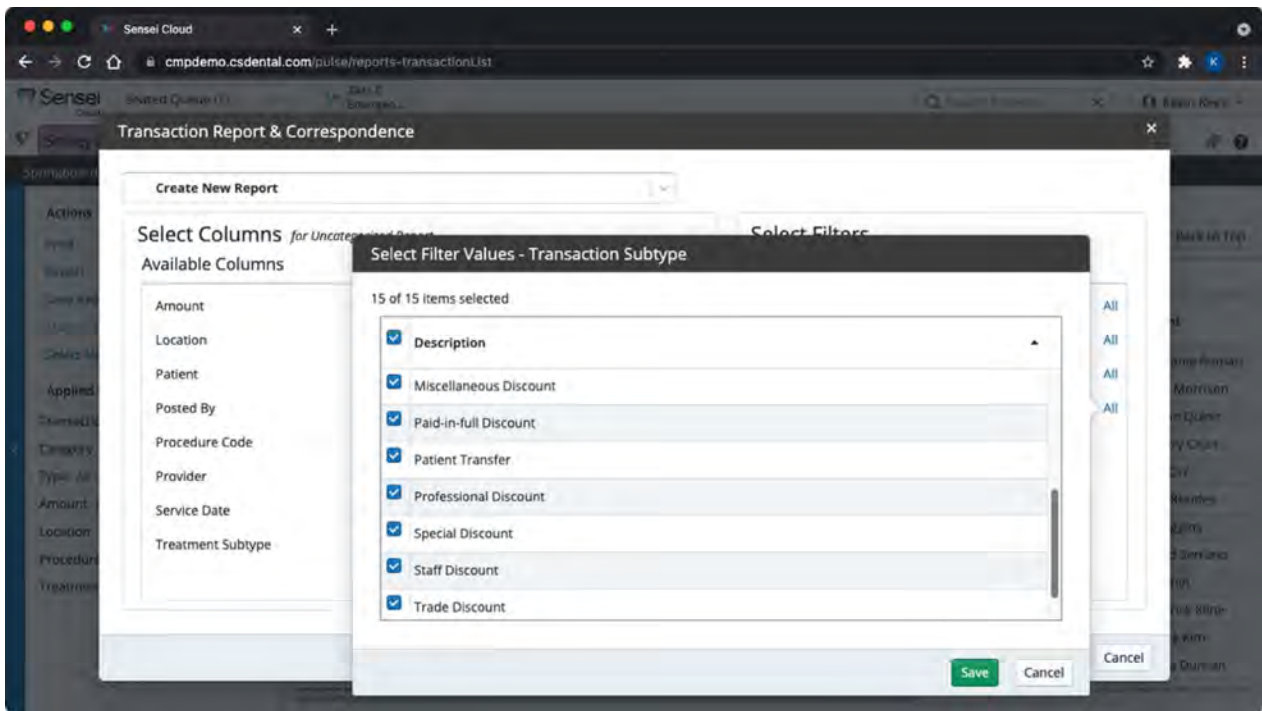
Ledger for Terrence Molarnator

Last Payment: \$550.00 (Jul 23, 2021)
Last Statement: \$612.53 (Jul 22, 2021)
Next Appointment: Aug 25, 2021

| Current Balance | Contract Balance | Total Balance | 0-30 Days | 31-60 Days | 61-90 Days | 91+ Days | Insurance Due (inc. write-offs) | Patient Due |
|-----------------|------------------|---------------|-----------|------------|------------|------------|---------------------------------|-------------|
| \$1,739.42 | \$0.00 | \$1,739.42 | \$0.00 | \$640.25 | \$0.00 | \$1,099.17 | \$2.00 | \$1,737.42 |

Aged Balance Exists

| Trans Da... | Svc Date | Code | Description | Amount | Current | Total |
|-------------|------------|-------------|---|-----------|------------|------------|
| 08/21/2021 | 08/21/2021 | Discount | DISCOUNT: Special Discount | -\$306.96 | \$1,739.42 | \$1,739.42 |
| 07/23/2021 | 07/23/2021 | Credit Card | Payment Credit Card | -\$550.00 | \$2,046.38 | \$2,046.38 |
| 07/22/2021 | 01/13/2021 | D0220 | (#14) Intraoral - periapical first radiographic image | \$46.00 | \$2,596.38 | \$2,596.38 |
| 07/22/2021 | 01/13/2021 | D9310 | consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician | \$160.00 | \$2,550.38 | \$2,550.38 |
| 07/22/2021 | 03/11/2021 | D9310 | consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician | \$165.00 | \$2,390.38 | \$2,390.38 |
| 07/22/2021 | 02/03/2021 | D9310 | consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician | \$165.00 | \$2,225.38 | \$2,225.38 |
| 07/22/2021 | 02/12/2021 | D9310 | consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician | \$165.00 | \$2,060.38 | \$2,060.38 |
| 07/22/2021 | 04/24/2019 | AW CHG | (UA) Change of archwire | \$0.00 | \$1,895.38 | \$1,895.38 |



We hope that these enhancements provide support for your financial workflows, giving your practice more flexibility in how you document and categorize financial adjustments. Please send us your feedback on what works well and what additional enhancements can be made.

Managing Orthodontic Recalls

This week's release includes significant enhancements to the existing Orthodontic Treatment Status functionality, which now provide your practice with the ability to manage orthodontic recalls. A new worklist has been created to manage orthodontic patients requiring recall [Location Tab > To Do > Ortho Recall List]. Additionally, you can now create and manage custom orthodontic treatment statuses, including the designation of any status as requiring recall [Administration Tab > Practice Settings > Ortho Treatment Status].

Click 'Create New Status' and specify a unique name for the status, add an optional description to help explain the status' use, and indicate whether the status should flag the patient as requiring recall when assigned. Alternatively, click on a list item to edit an existing ortho treatment status. As indicated in the 'Update Ortho Treatment Status' dialog, any updates made to the status will be automatically reflected throughout Sensei Cloud. Any edits made to the

status (such as a label / name change) will be automatically reflected throughout Sensei Cloud. Deactivating an existing status will prevent its future use, but will not impact any patients currently assigned with this status.

Ortho Treatment Status Management
for All Locations

| Status Name | Description | Rec... | Delay | Sta... |
|--------------------|---|--------|-----------|--------|
| Appointment Needed | Patient is in current treatment and needs to be scheduled. | Y | 1 Month | A |
| Consultation | A consultation has been scheduled to examine teeth. | | | A |
| Diagnostic Records | An appointment is specifically scheduled to obtain Diagnostic Records - the patient has not yet opted to continue treatment with the practice. | | | A |
| Full Treatment | Patient is in the midst of full treatment. | | | A |
| Inactive | The patient has been dismissed from the practice, either after completed treatment or after determining they would not proceed with treatment. | | | A |
| New Patient | Default Status: patient has been added to database however no appointments or treatment have taken place. | | | A |
| Observation | Patients who are either not yet quite ready for braces or have had an interceptive phase of treatment and are waiting for their remaining permanent teeth to come in so they can finish | Y | 6 Months | A |
| Pending | Treatment is needed but the patient has not opted to proceed yet. | Y | 12 Months | A |
| Phase I | Patient is in the midst of Phase I treatment. | | | A |

Update Ortho Treatment Status

Note: This orthodontic treatment status may currently be in use and applied to patients. Any changes made here will be reflected everywhere that it is used.
Note: Making this status inactive will not remove it from patients that it is currently applied to, but will make it unavailable to apply in the future.

Status Name: Pending

Description: Treatment is needed but the patient has not opted to proceed yet

Requires Recall:

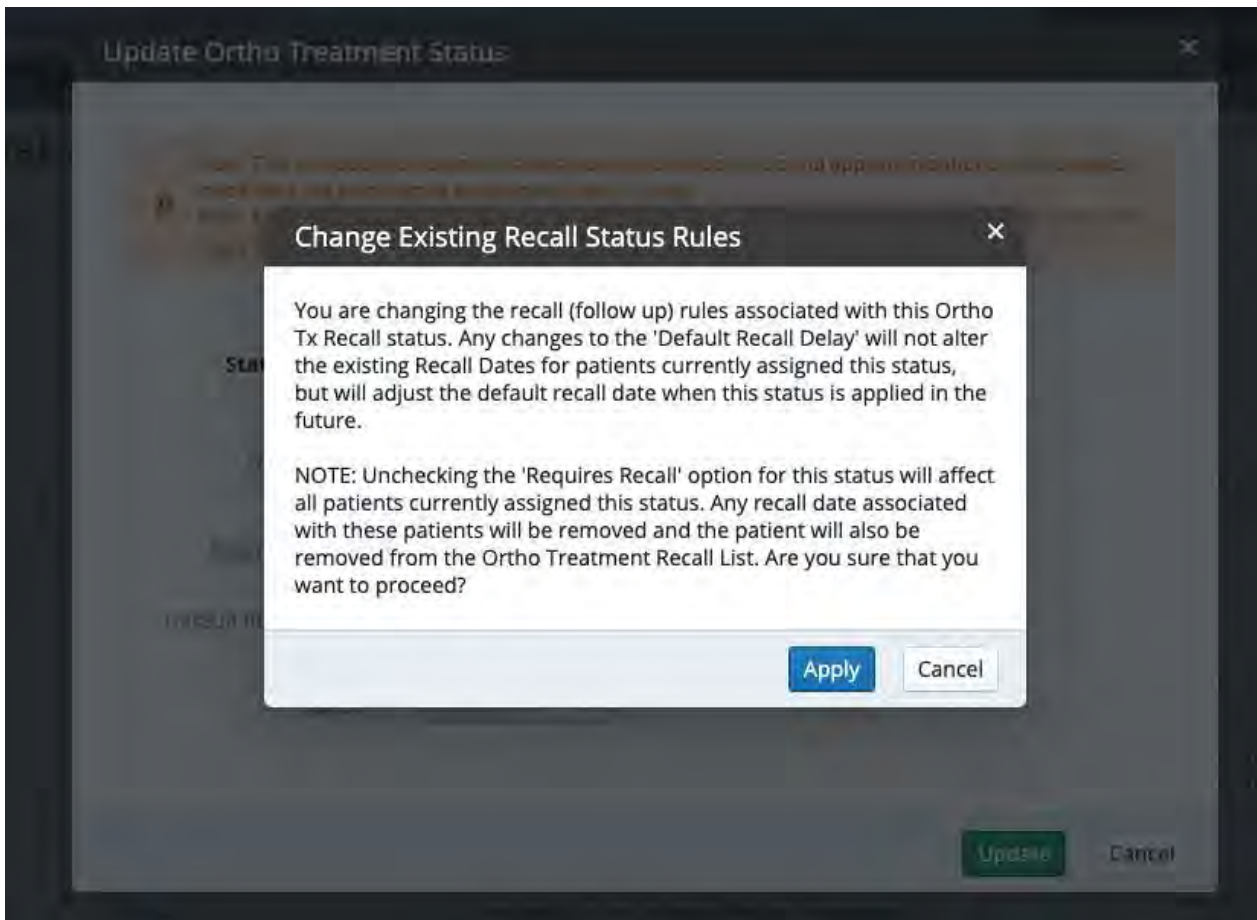
Default Recall Delay: 12 Months

Status: Active Inactive

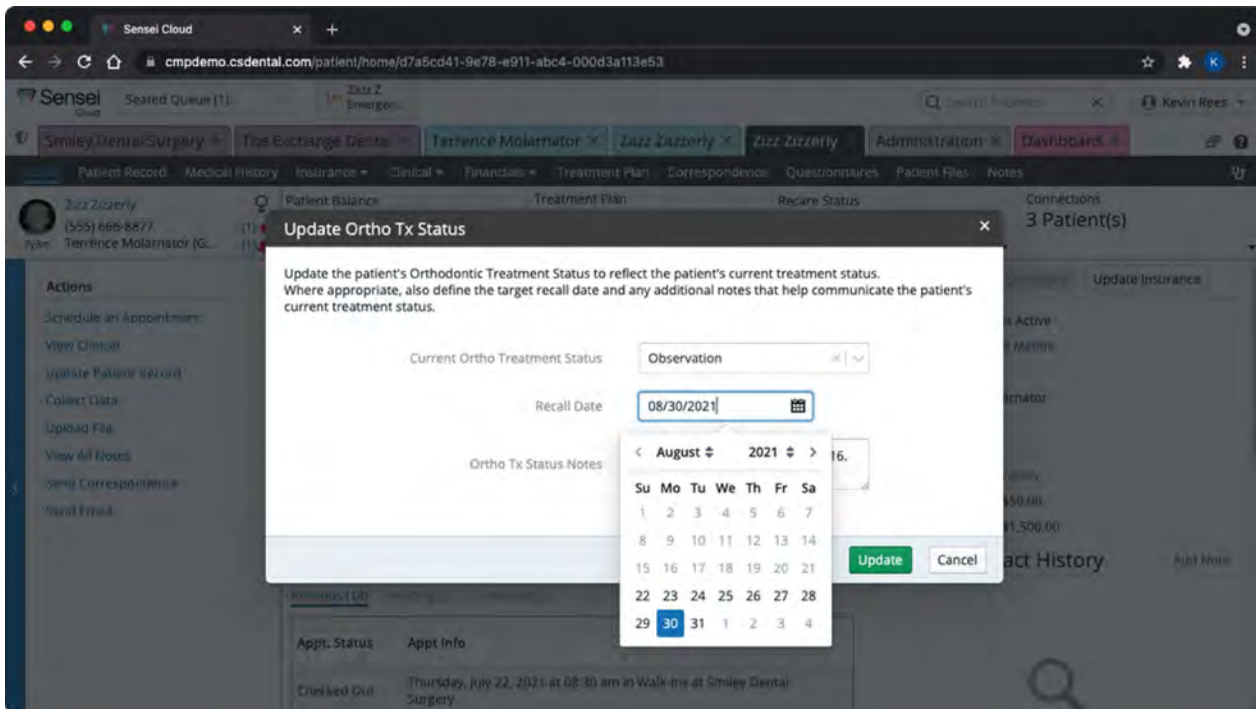
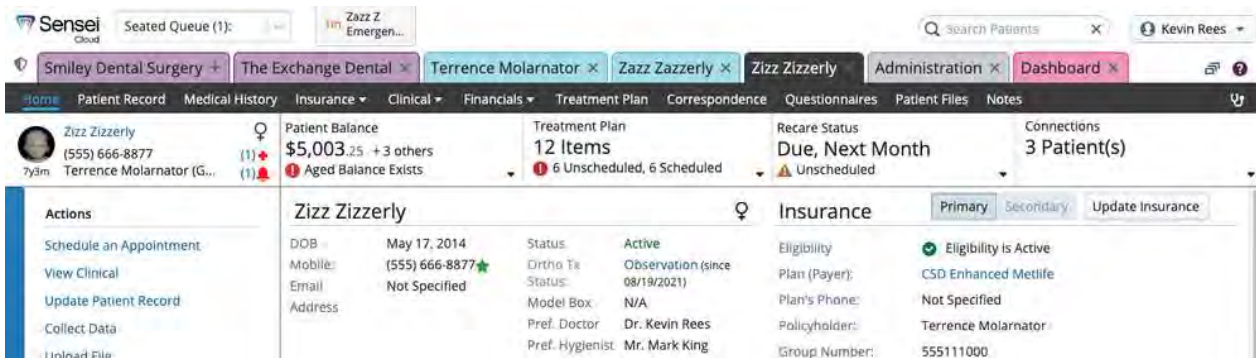
Update Cancel

NOTE: When clicking 'Requires Recall', designate a 'Default Recall Delay' that will be used to automatically calculate an assigned recall due date when the status is assigned to a patient. Additionally, changes to an existing status' 'requires recall' settings will prompt an additional warning about the effect of these changes. Please note that removing the 'requires recall' designation

from a status will automatically remove all associated patients from the Ortho Recall List (e.g., those patients currently assigned the status). However, updating the 'Default Recall Delay' will only apply to future applications of the status and will not alter any existing patient's recall dates.



Any active status can be selected when assigning or updating a patient's orthodontic treatment status, which can be easily managed throughout Sensei Cloud. This includes via the Patient Snapshot, Patient Homepage, Patient Record, and Orthodontic Clinical Summary screens. Click on the status hyperlink to edit the patient's currently assigned ortho treatment status. When a 'requires recall' status has been selected, the 'Recall Date' field becomes enabled and defaults based on the status' default recall delay setting. A note can also be added to help communicate the ortho treatment status change. NOTE: This date can be manually changed to any future date (e.g., after today) if the automatically calculated recall date is not appropriate.



Whenever patients are assigned an orthodontic treatment status that is 'requires recall', they are automatically added to the new Ortho Recall List [Location Tab > To Do > Ortho Recall List]. By default, the worklist displays all ortho patients requiring recall, based on their assigned recall date. Several filters enable you to further manage this list, including ortho treatment status, recall date, or whether the patient already has another scheduled appointment. This includes the ability to search by specific patients. NOTE: The list of patients displayed in a given location's Ortho Recall List is based on the patient's 'Preferred Location', as defined in the Patient Record, and the assignment of a 'requires recall' orthodontic treatment status.

Ortho Recall List
Filtered by All Statuses, All Dates

| Patient | Ortho Tx Sta... | Recall Date | Last Seen | Next Appt | Last Update | Recall Notes |
|--|--------------------|-------------|-------------------------------------|-----------|--------------------------------|---|
| Jamil Orr (477) 555-2626 Ext. 87 (Home) | Appointment Needed | 08/27/2021 | 12/14/2020 at Smiley Dental Surgery | N/A | 08/19/2021 by Danelle Thompson | Call to schedule impressions for new |
| Jodie Chase (952) 555-4558 (Work Fax) | Phase II Pending | 08/30/2021 | 12/09/2020 at Smiley Dental Surgery | N/A | 08/19/2021 by Danelle Thompson | Need to fit for RPE |
| Devon Hampton (394) 555-8733 (Home Fax) | Appointment Needed | 08/30/2021 | 09/23/2019 at Smiley Dental Surgery | N/A | 08/19/2021 by Danelle Thompson | Mom not present - call to schedule +8w arch |
| Zizz Zizzerly (555) 666-8877 (Mobile) | Observation | 08/30/2021 | 03/04/2021 at Smiley Dental Surgery | N/A | 08/21/2021 by Kevin Rees | Patient out of town week of 8/16. Move |
| Percy Drake (636) 555-6338 Ext. 580 (Main) | Referral/Consu | 08/31/2021 | N/A | N/A | 08/19/2021 by Danelle Thompson | |
| Roger Dodger (770) 555-9845 (Mobile) | Appointment Needed | 08/31/2021 | 08/19/2021 at Smiley Dental Surgery | N/A | 08/19/2021 by Danelle Thompson | Had to go to Soccer Practice - call to |
| Michaela Gent | | | | | 08/19/2021 by Danelle | |

Clicking on a patient in the worklist expands the record to display additional information. This includes a rundown of the sequential updates to the patient's orthodontic treatment status, along with any notes added as part of the latest status change. From here, you can quickly update the patient's orthodontic treatment status and/or schedule a new appointment, if applicable. NOTE: Scheduling a new appointment will neither automatically update the patient's ortho treatment status, nor remove the patient from the worklist. To remove patients from the Ortho Recall List, simply update their ortho treatment status to a non-requires recall status.

Ortho Recall List
Filtered by All Statuses, All Dates

| Patient | Ortho Tx Sta... | Recall Date | Last Seen | Next Appt | Last Update | Recall Notes |
|---------------------------------------|-----------------|-------------|-------------------------------------|-----------|--------------------------|--|
| Zizz Zizzerly (555) 666-8877 (Mobile) | Observation | 08/30/2021 | 03/04/2021 at Smiley Dental Surgery | N/A | 08/21/2021 by Kevin Rees | Patient out of town week of 8/16. Move |

Zizz Zizzerly
(555) 666-8877
7:31m Terrence Molnator (Guar...)

Status History

| |
|--|
| (1) Observation (04/01/2021 - Current) |
| (1) Tx - Phase I (02/26/2021 - 02/26/2021) |

Status Notes
Patient out of town week of 8/16. Move follow up back 2 weeks.

Update Ortho Tx Status | Schedule Appointment

| | | | | | | |
|--|--------------------|------------|-------------------------------------|-----|--------------------------------|--|
| Percy Drake (636) 555-6338 Ext. 580 (Main) | Referral/Consu | 08/31/2021 | N/A | N/A | 08/19/2021 by Danelle Thompson | |
| Roger Dodger (770) 555-9845 (Mobile) | Appointment Needed | 08/31/2021 | 08/19/2021 at Smiley Dental Surgery | N/A | 08/19/2021 by Danelle Thompson | Had to go to Soccer Practice - call to |
| Michaela Gent (404) 555-8787 (Home) | Observation | 09/01/2021 | N/A | N/A | 08/19/2021 by Danelle Thompson | |
| Carly Brooks (916) 555-2025 (Home) | Referral/Consu | 09/03/2021 | N/A | N/A | 08/19/2021 by Danelle | Dr. Sheryl Kim's niece; |

Finally, it should be noted that all custom orthodontic treatment statuses are available in the Patient List reporting [Dashboard Tab > Reports > Patient List]. Moreover, 'Ortho Recall Date' is now an additional variable that can be used for generating reports. Additionally, the merge fields available for use in correspondence templates have been updated to include ortho treatment status and ortho recall date [Administration Tab > Templates > Correspondence Templates].

| Ortho Tx Status Name | Ortho Tx Status Description |
|--|---|
| <input checked="" type="checkbox"/> Observation | Patients who are either not yet quite ready for braces or have had an interceptive phase of treatment and are waiting for their remaining permanent teeth to come in so they can finish |
| <input checked="" type="checkbox"/> Pending | Treatment is needed but the patient has not opted to proceed yet. |
| <input type="checkbox"/> Phase I | Patient is in the midst of Phase I treatment. |
| <input type="checkbox"/> Phase II | Patient is in the midst of Phase II treatment. |
| <input checked="" type="checkbox"/> Phase II Pending | Phase I work is complete, Phase II work is pending. |
| <input type="checkbox"/> Referral/Consult | Patient referred to practice - consult has not yet taken place. |

| Ortho Tx Status Name | Ortho Recall Date |
|----------------------|-------------------|
| Michaela | 09/01/2021 |
| Mikey | 09/16/2021 |
| Devon | 08/30/2021 |
| new | 10/25/2021 |
| Brie | 02/14/2022 |

We hope that this new functionality significantly improves your practice's ability to manage the recall business within your orthodontic patient base. We look forward to your feedback on what works well and what additional enhancements would further improve your patient management workflows.

Optimizations and Fixes

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

1. [UK Only] Added access to the NHS Claims Management UI on the 'All Locations' tab, providing multi-clinical practices with a centralized claims list.
2. Addressed a defect that resulted in a system error when trying to launch the imaging bridge under certain usage contexts.
3. Resolved an issue that would sometimes prevent the posting of procedures under a specific set of conditions involving a subset of

anatomy types.

4. Fixed a UI defect with the appointment queues (e.g., Waiting, Seated, Checkout Queues) that affected the display of the queue tile list.
5. Resolved a bug in which the treatment subtype (and associated anatomy type) were misclassified for partial denture procedure codes.
6. Addressed various performance issues impacting the display of appointment data and responsiveness of the Schedule Day/View.

 Add tags

| | |
|---|---------|
|  | 2 Kudos |
|---|---------|

Reply

Sort: Newest to Oldest

[All forum topics](#) < [Previous Topic](#) [Next Topic](#) >



Reply...

Post Reply

Powered by
Khoros 

CORPORATE HEADQUARTERS

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

CONTACT

[Contact Us](#)
[Support Locator](#)
[Training](#)

ABOUT US

[Blog](#)

[Media Room](#)

QUICK LINKS

[Carestream Dental Institute](#)

[Carestream Dental Website](#)



[Global Data Privacy Shield](#)

[Terms and Conditions](#)

[Privacy Policy](#)

© 2019 Carestream Dental, LLC. All Rights Reserved