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.

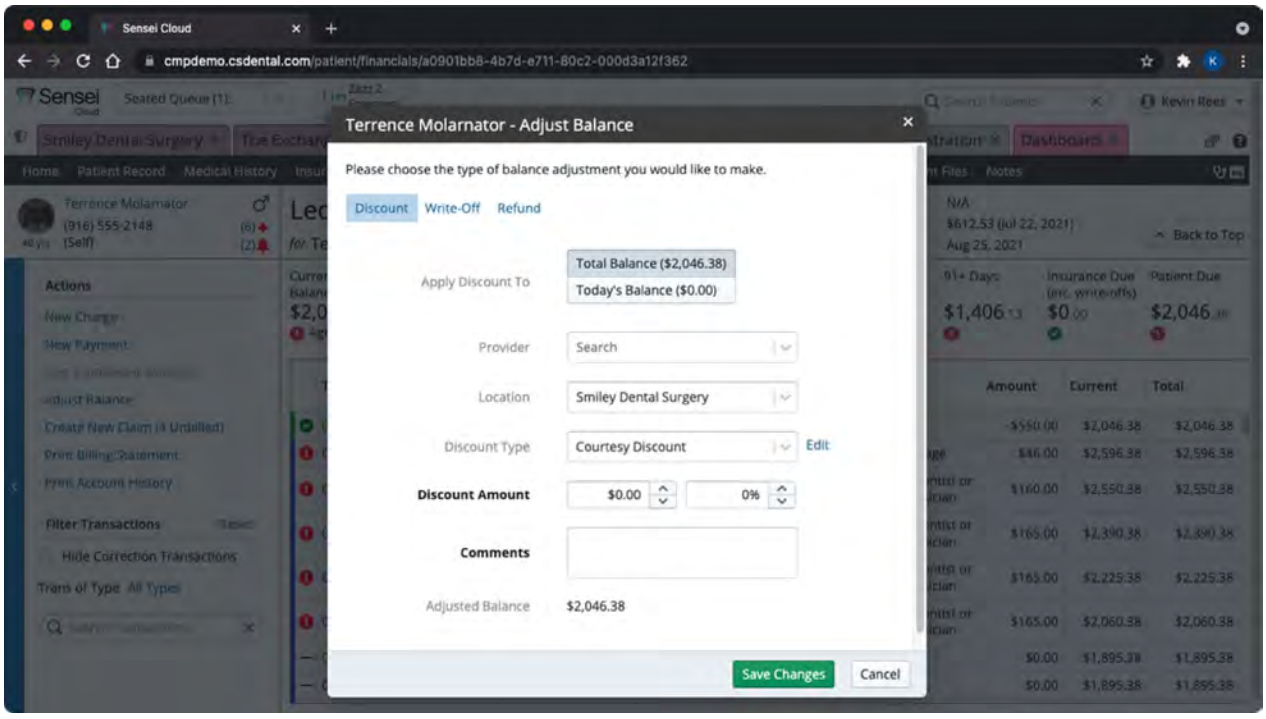
[0.1.6678 RELEASE UPDATES CONTINUED FROM PART 1]

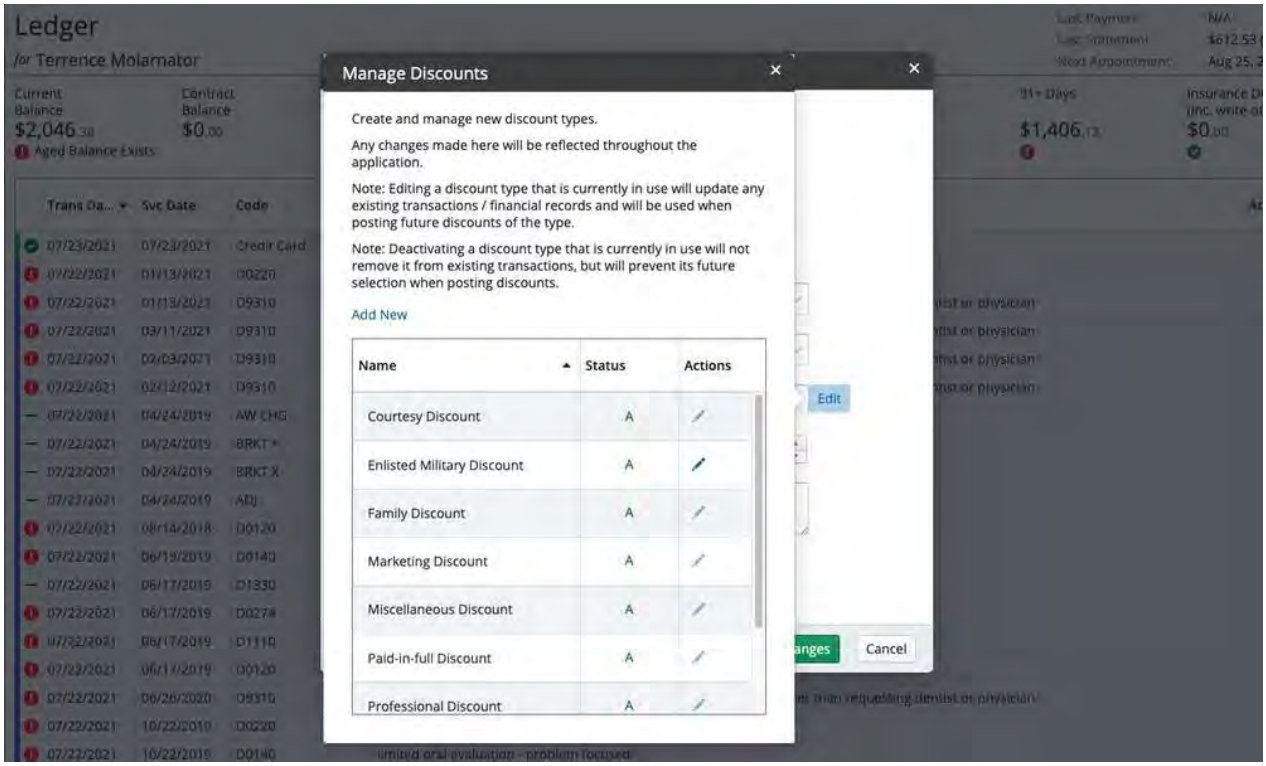
Custom Discount and Write-Offs

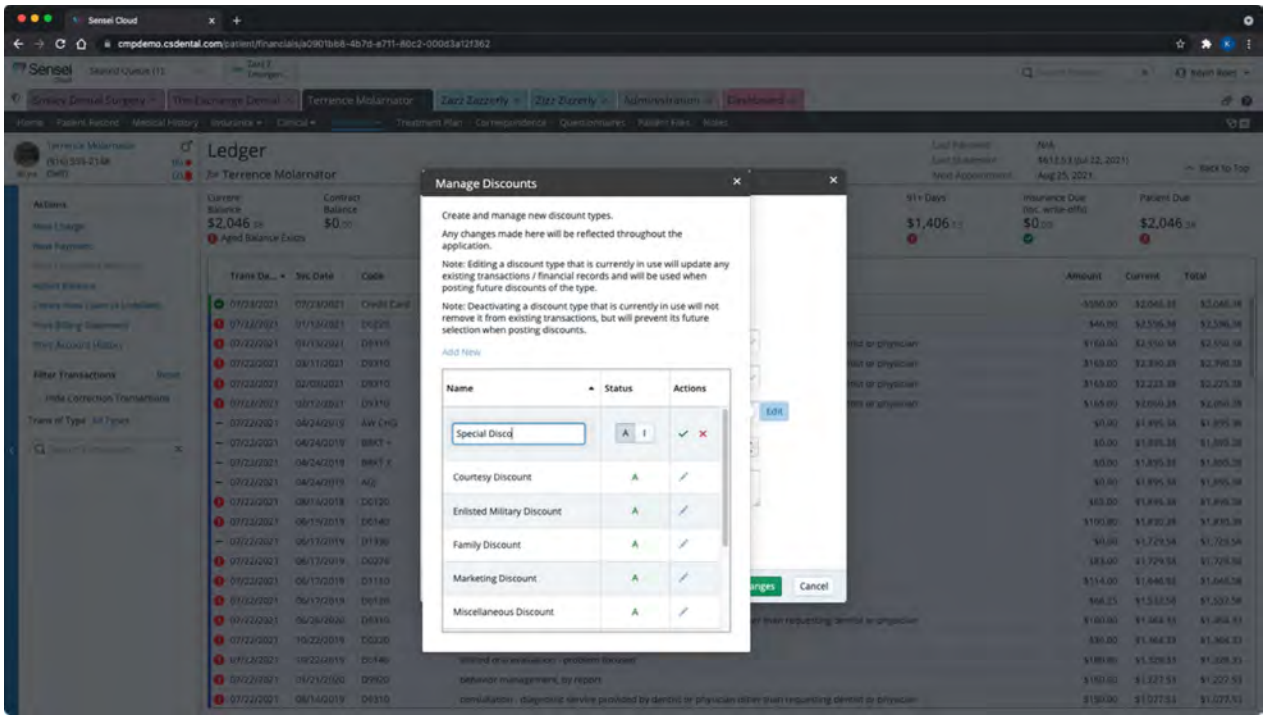
Sensei Cloud now supports the creation and management of custom Discount and Write-Offs types that can be used when posting financial adjustments. Any new custom types that you create of these adjustments can be used whenever posting balance adjustments via the Patient Ledger [Patient Tab > Financials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

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.

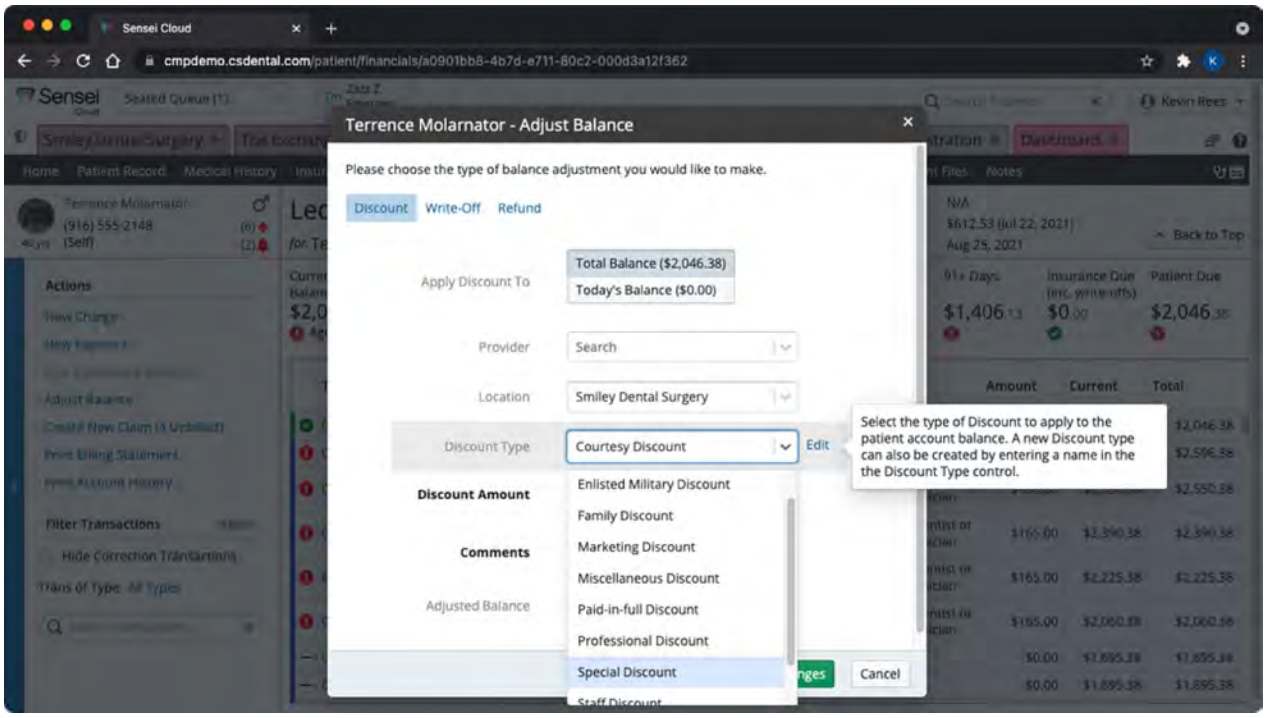


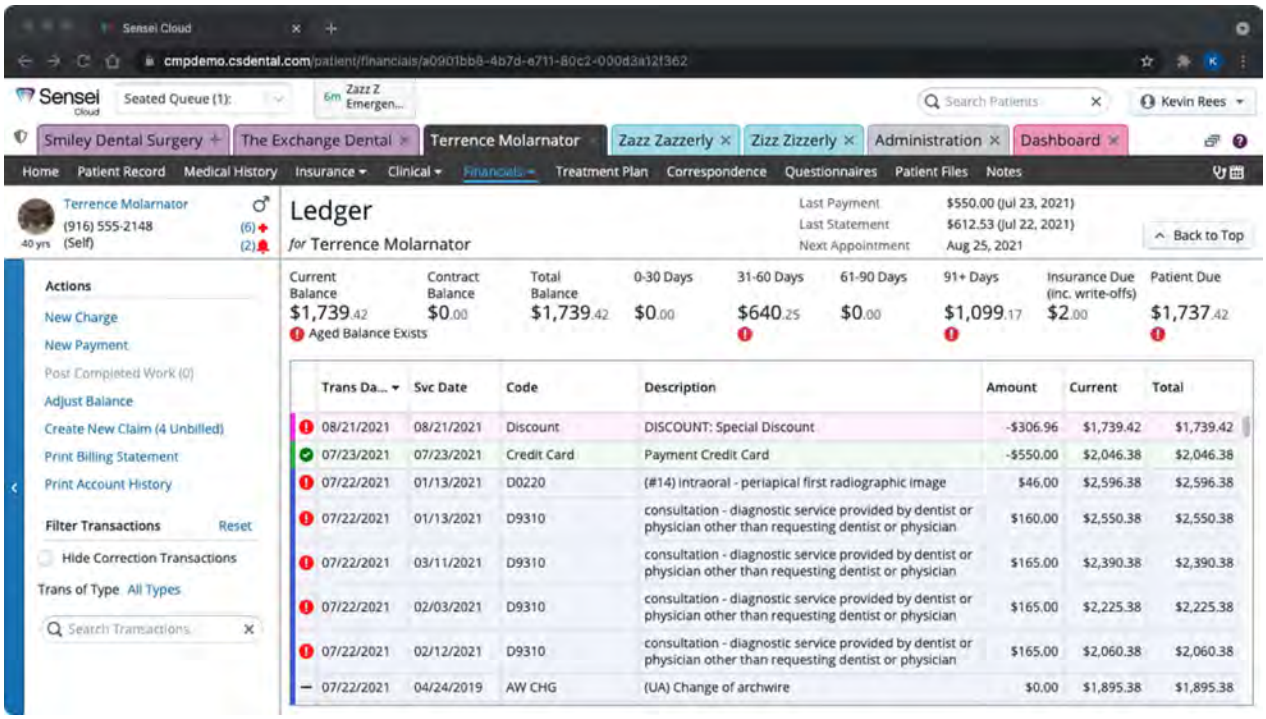


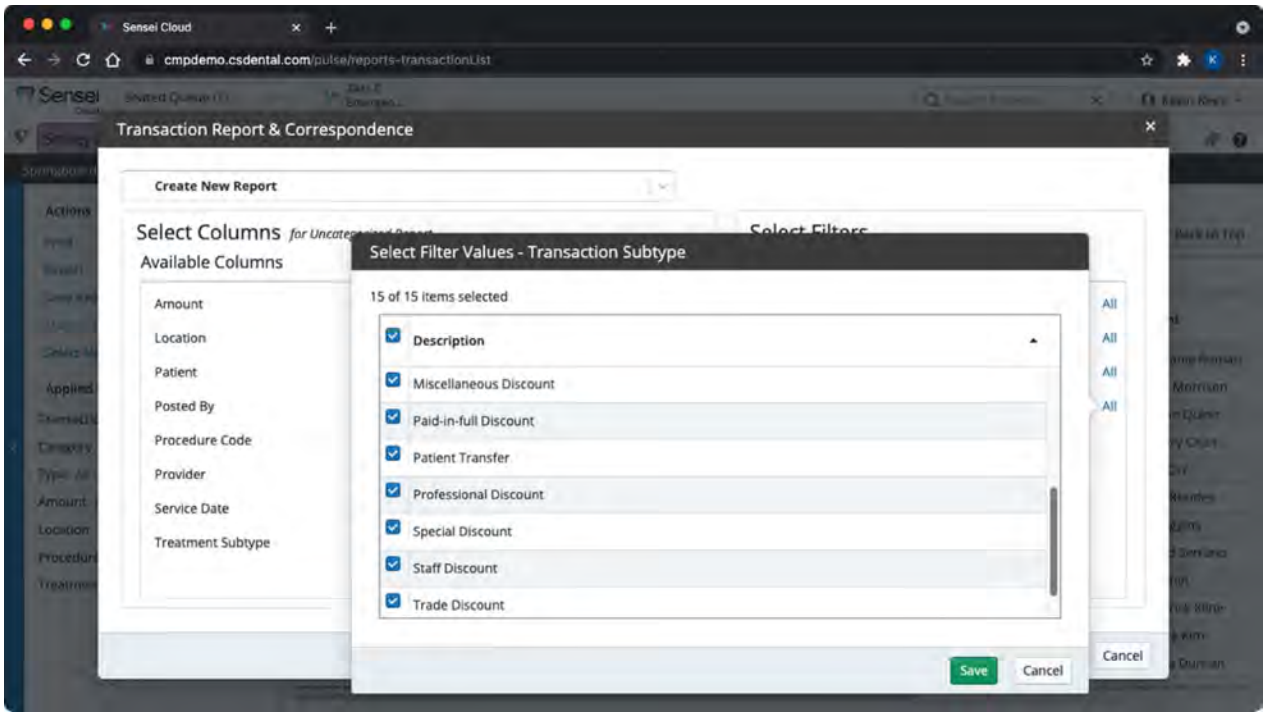


As previously mentioned, any active discount and write-off types created now will be available when posting financial adjustments. Simply select the desired option when posting your discount or write-off. Additionally, custom adjustment types are included in all of the existing financial reporting and 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].







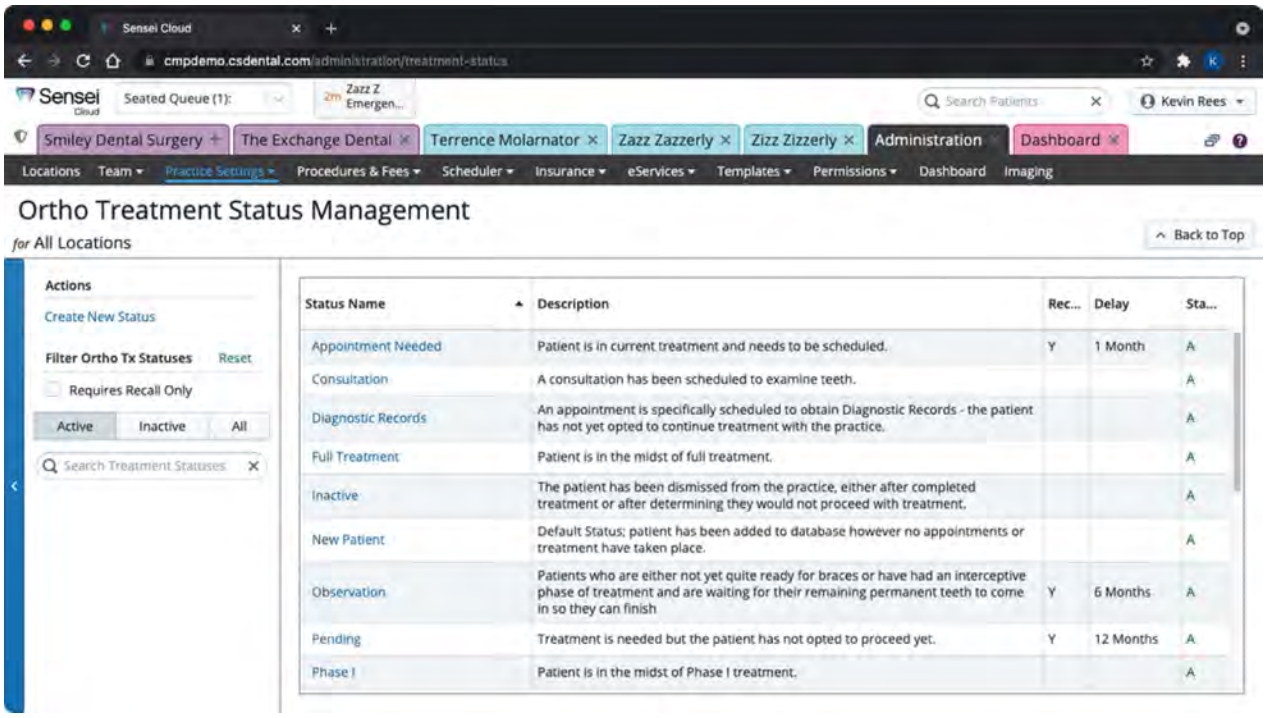
We hope that these enhancements provide support for your financial workflows, giving your practice more flexibility in how you document and categorize financial adjustments. Please send us your feedback on what works well and what additional enhancements can be made.

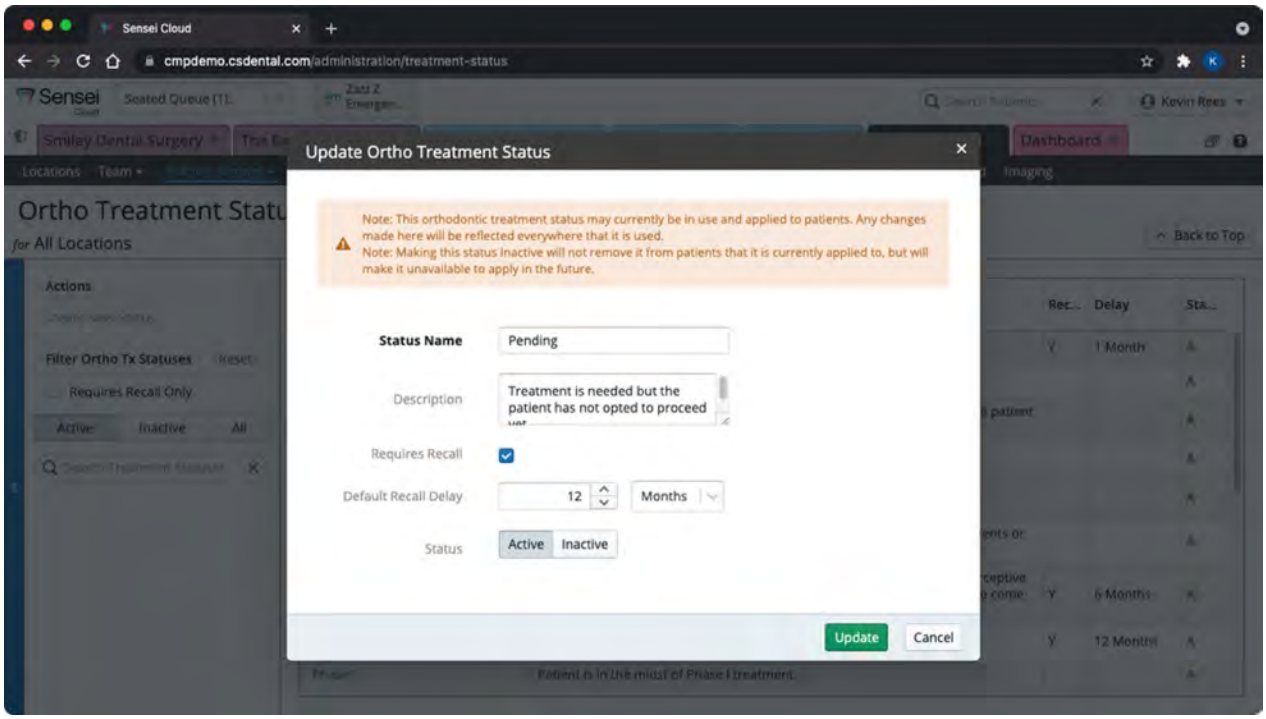
Managing Orthodontic Recalls

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

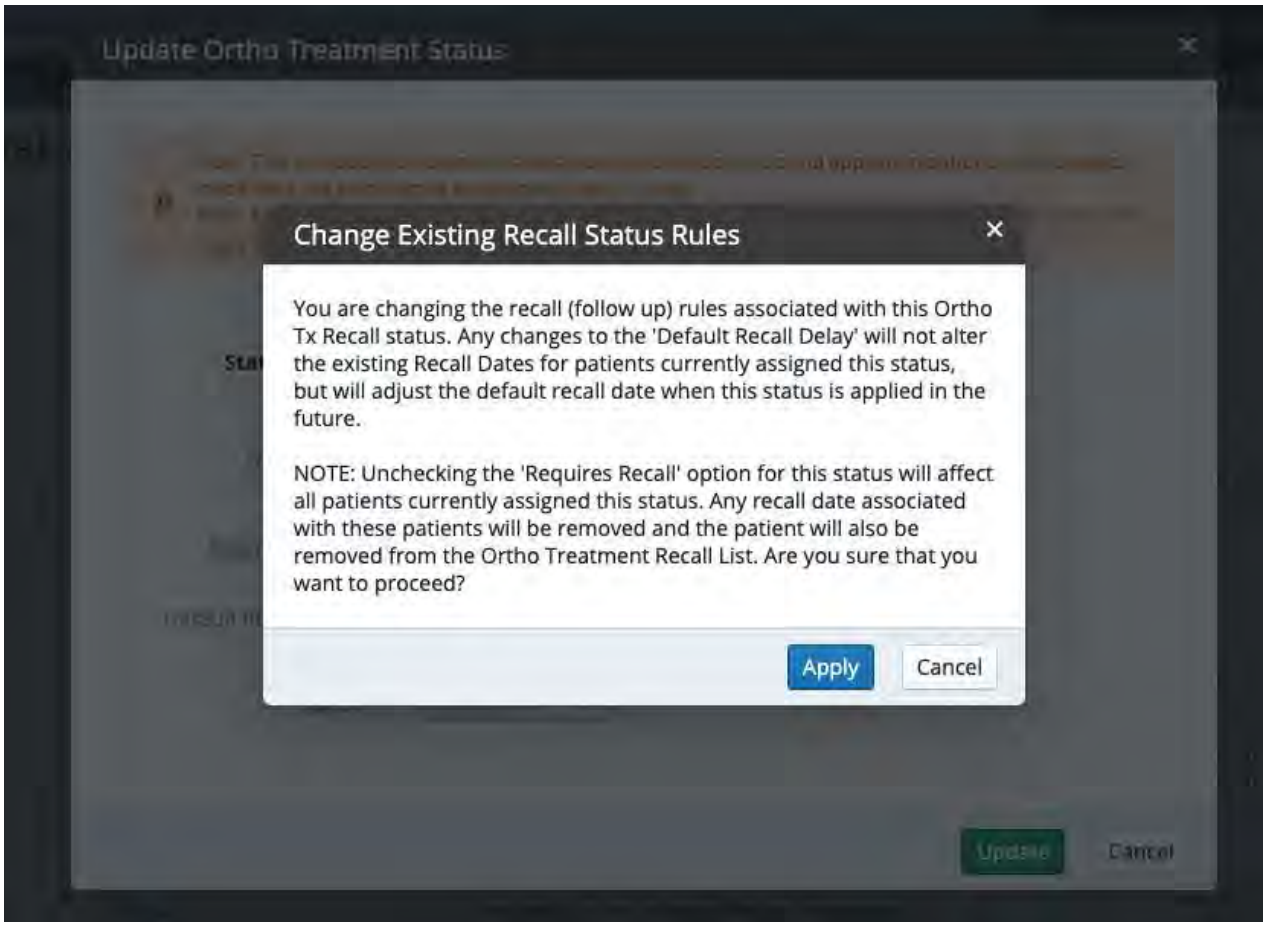
status (such as a label / name change) will be automatically reflected throughout Sensei Cloud. Deactivating an existing status will prevent its future use, but will not impact any patients currently assigned with this status.



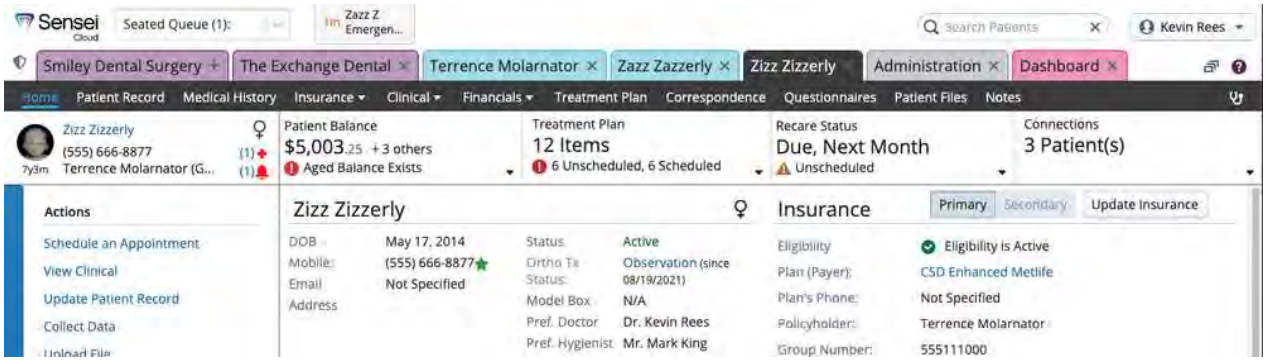


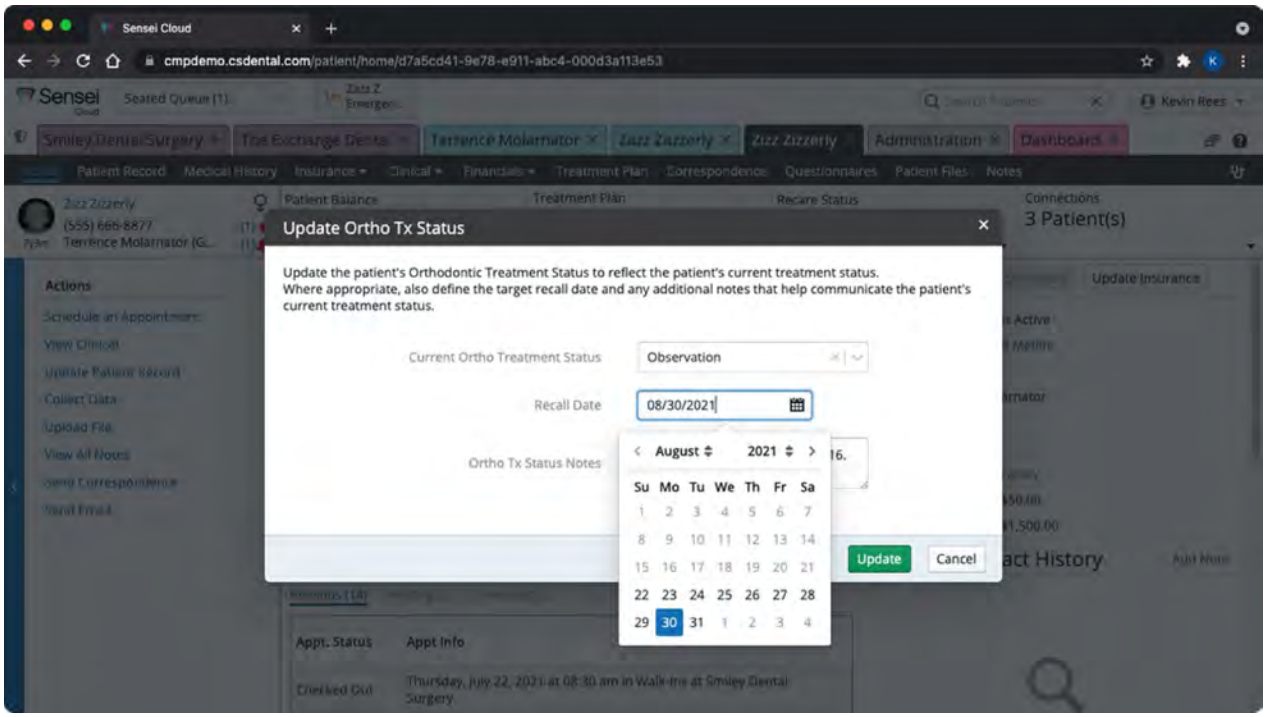
NOTE: When clicking ‘Requires Recall’, designate a ‘Default Recall Delay’ that will be used to automatically calculate an assigned recall due date when the status is assigned to a patient. Additionally, changes to an existing status’ ‘requires recall’ settings will prompt an additional warning about 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.

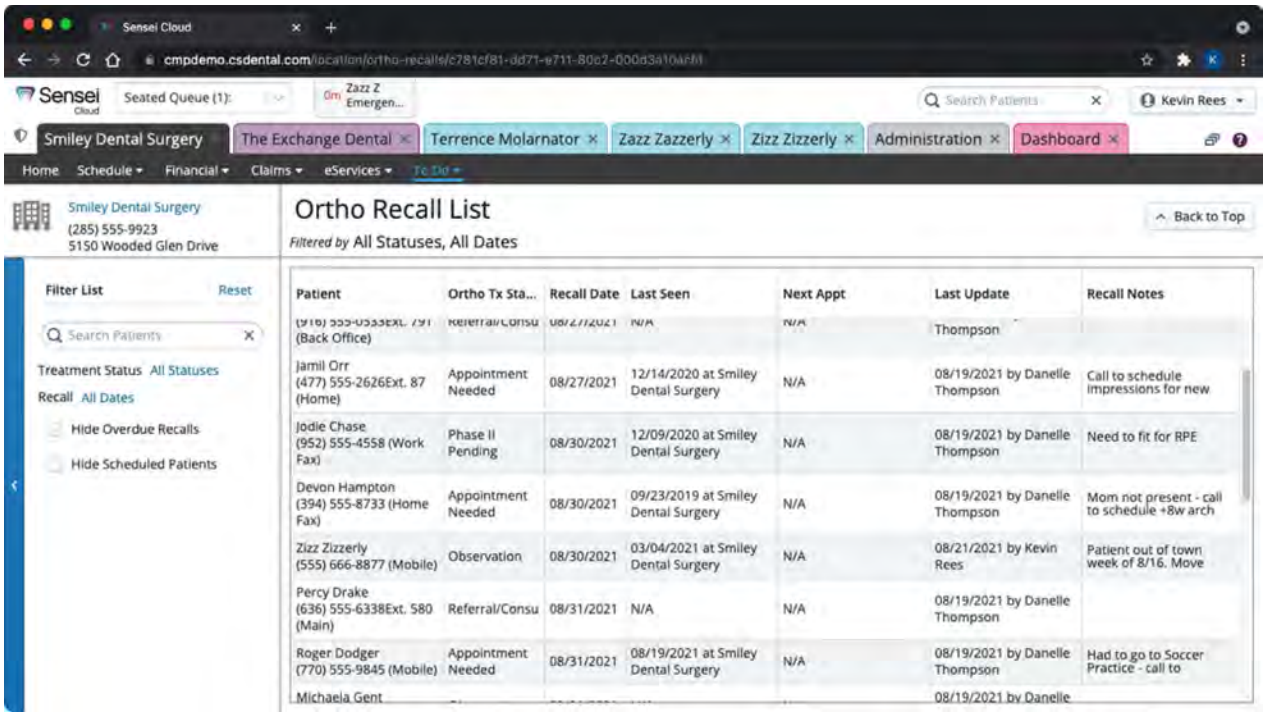


Any active status can be selected when assigning or updating a patient's orthodontic treatment status, which can be easily managed throughout Sensei Cloud. This includes via the Patient Snapshot, Patient Homepage, Patient Record, and Orthodontic Clinical Summary screens. Click on the status hyperlink 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.

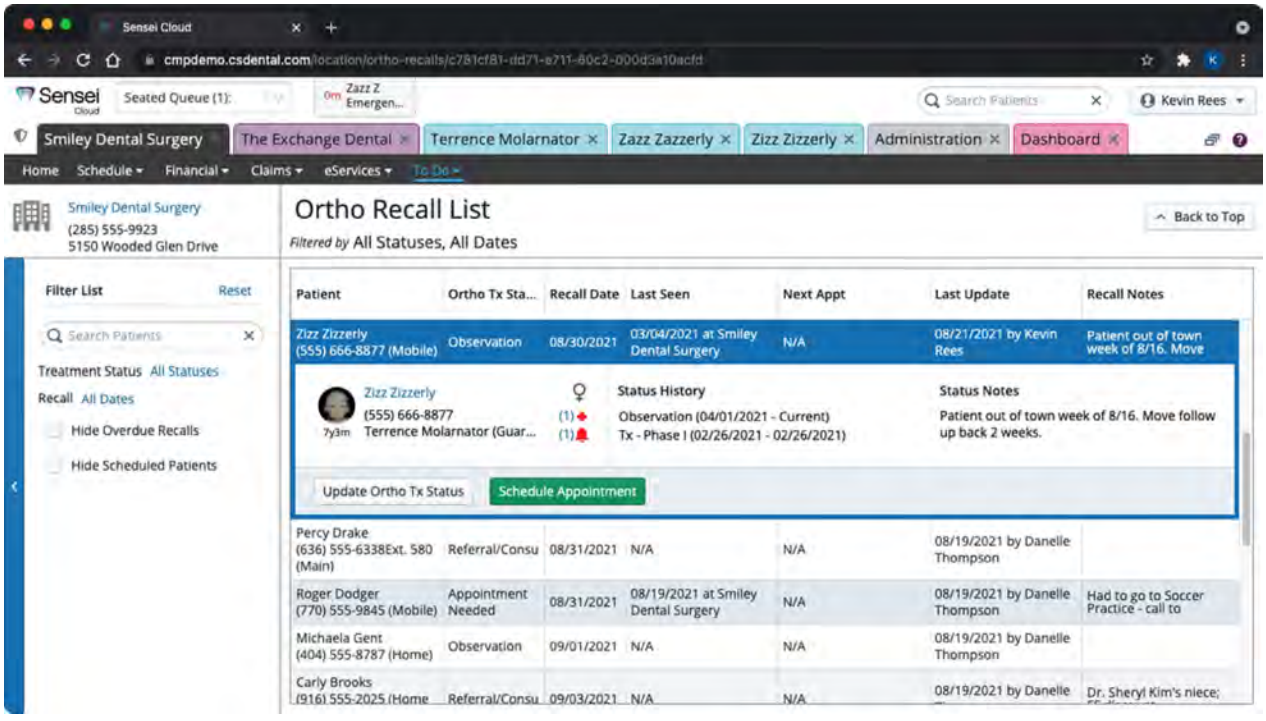




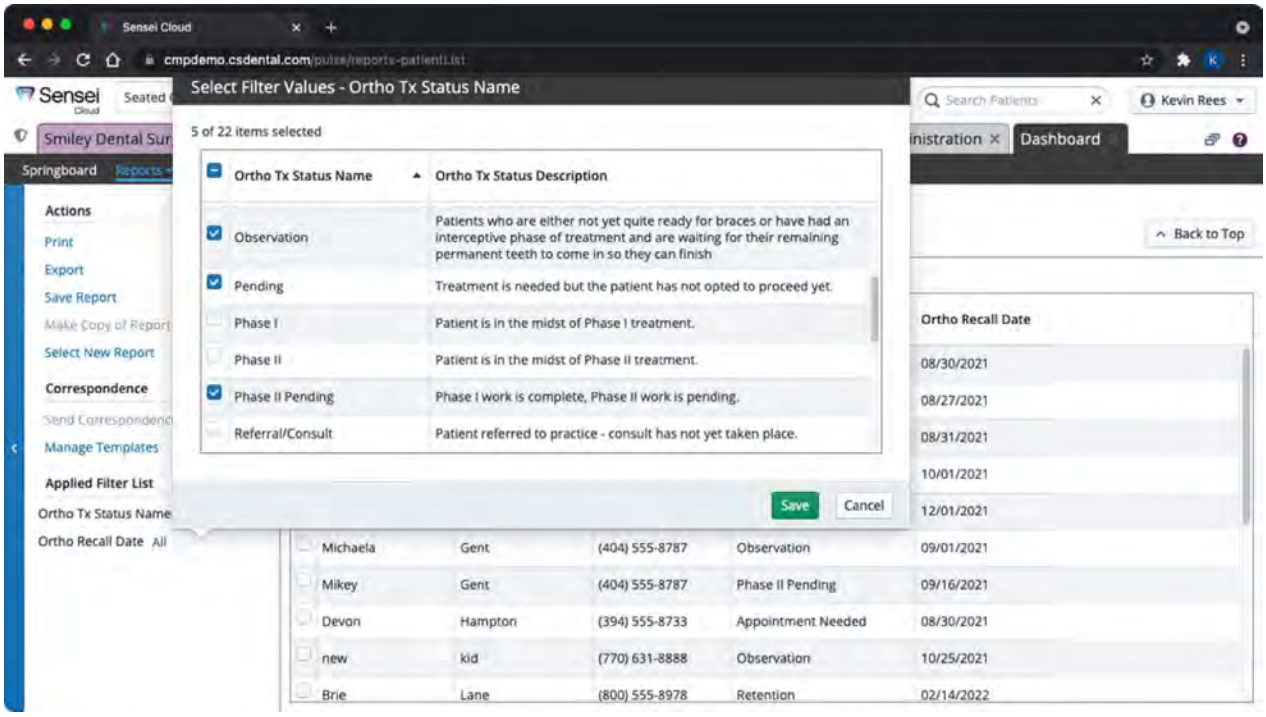
Whenever patients are assigned an orthodontic treatment status that is ‘requires recall’, they are automatically added to the new Ortho Recall List [Location Tab > To Do > Ortho Recall List]. By default, the worklist displays all ortho patients requiring recall, based on their assigned recall date. Several 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.



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.



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].



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

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