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MOD kevin_moloney

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09-13-2021 09:14 PM

Sensei Cloud Release 0.1.6815 (Part 1)

Sensei Cloud

Weekly Release

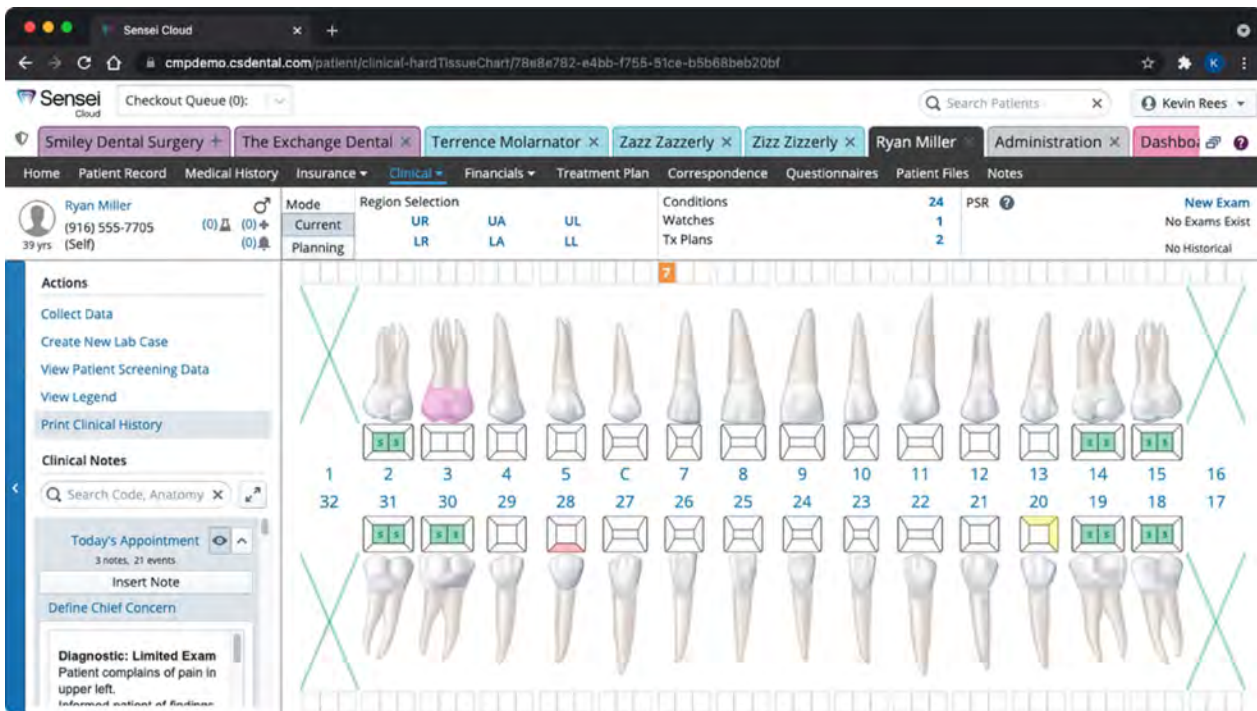
Build 0.1.6815 | September 14th, 2021

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

Printing Patient Clinical History

Based on customer input, this week's release includes extended support for the inclusion of clinical notes in printouts. You are now able to include temporally-relevant clinical notes within the treatment plan printout via the Hard Tissue Chart, which was recently updated to include the graphical odontogram (see the 0.1.6534 release notes, part 3 from July 14th, 2021). With this update, you can also now print out the patient's entire history of clinical notes, including the current state of the graphical tooth chart.

To print a copy of a patient's clinical history, click the new 'Print Clinical History' action in the side panel of the Hard Tissue Chart [Patient Tab > Clinical > Hard Tissue Chart]. NOTE: You must be in 'Current' charting mode to print the patient's clinical history. This generates a .PDF that includes a standard header with the practice information, patient information, and the reference date (e.g., the 'accurate as of' date). The details of the clinical history include a copy of the patient's current hard tissue chart (e.g., what you see in 'Current' charting mode) and a list of all clinical notes. NOTE: The clinical history printout does not currently contain all documented clinical events, such as procedures, watches, diagnoses, or chief complaints. However, it does contain all day- and event-based clinical notes that have been created, including those appended to the aforementioned clinical events.



Clinical Notes

Search Code, Anatomy X ↗

Today's Appointment 👁️ ⬆️
3 notes, 21 events

Insert Note

Define Chief Concern

Disruption: Limited Exam

Clinical History f....pdf ⬆️

Session Cloud Clinical History for Ryan Miller

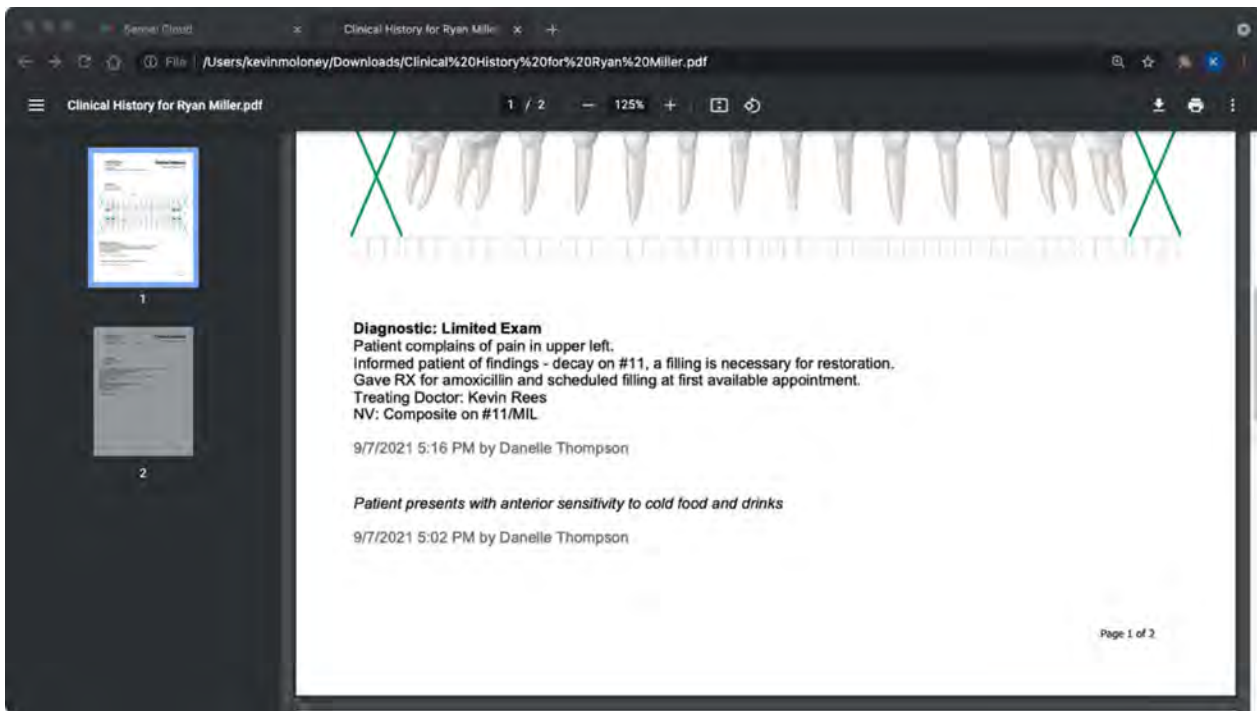
File | /Users/kevinmoloney/Downloads/Clinical%20History%20for%20Ryan%20Miller.pdf

Clinical History for Ryan Miller.pdf 1 / 2 - 125% +

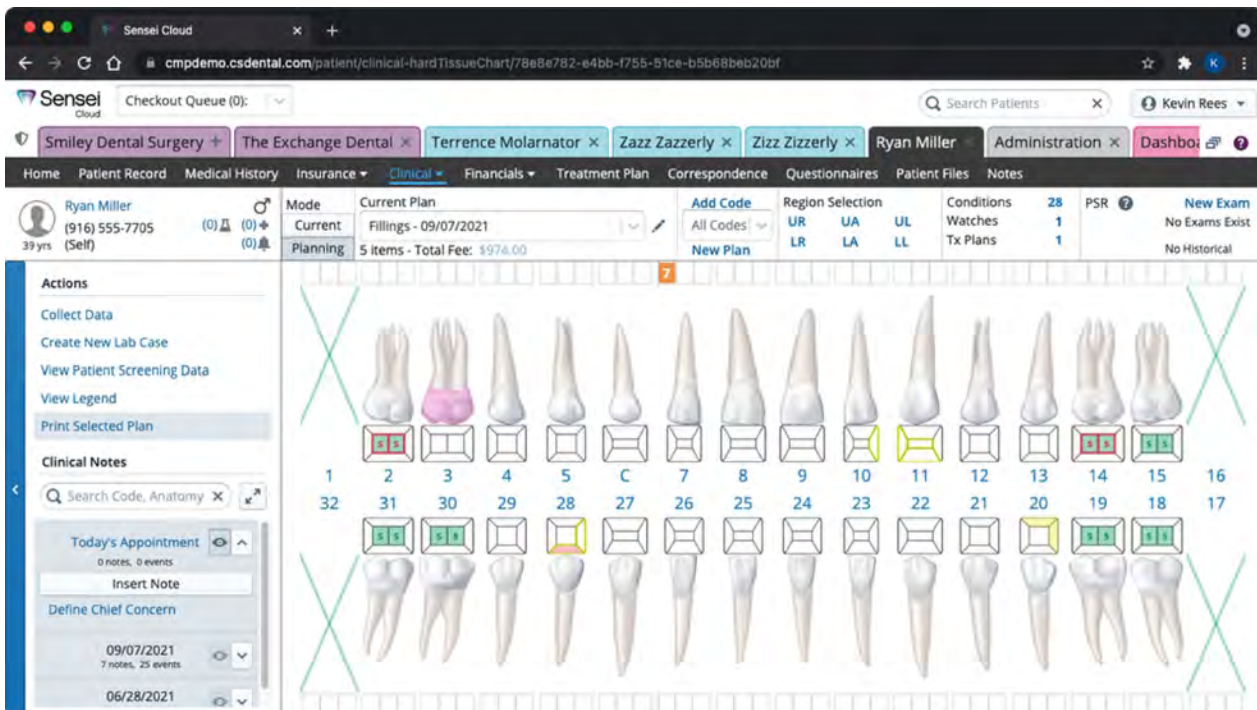
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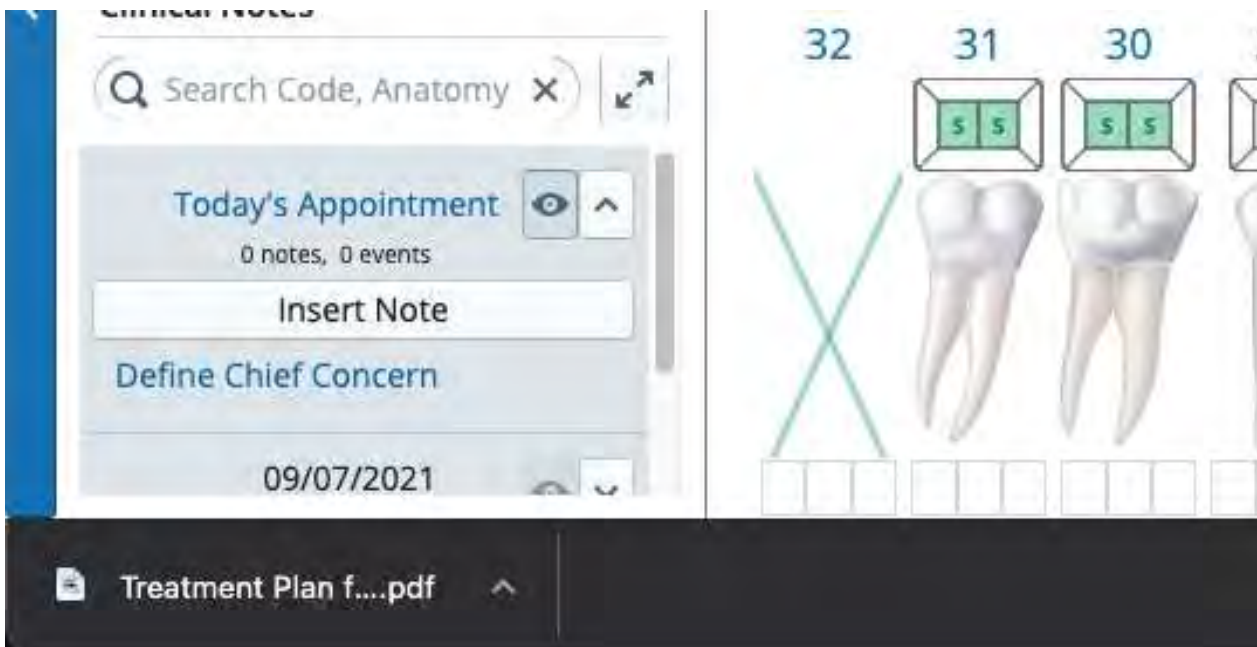
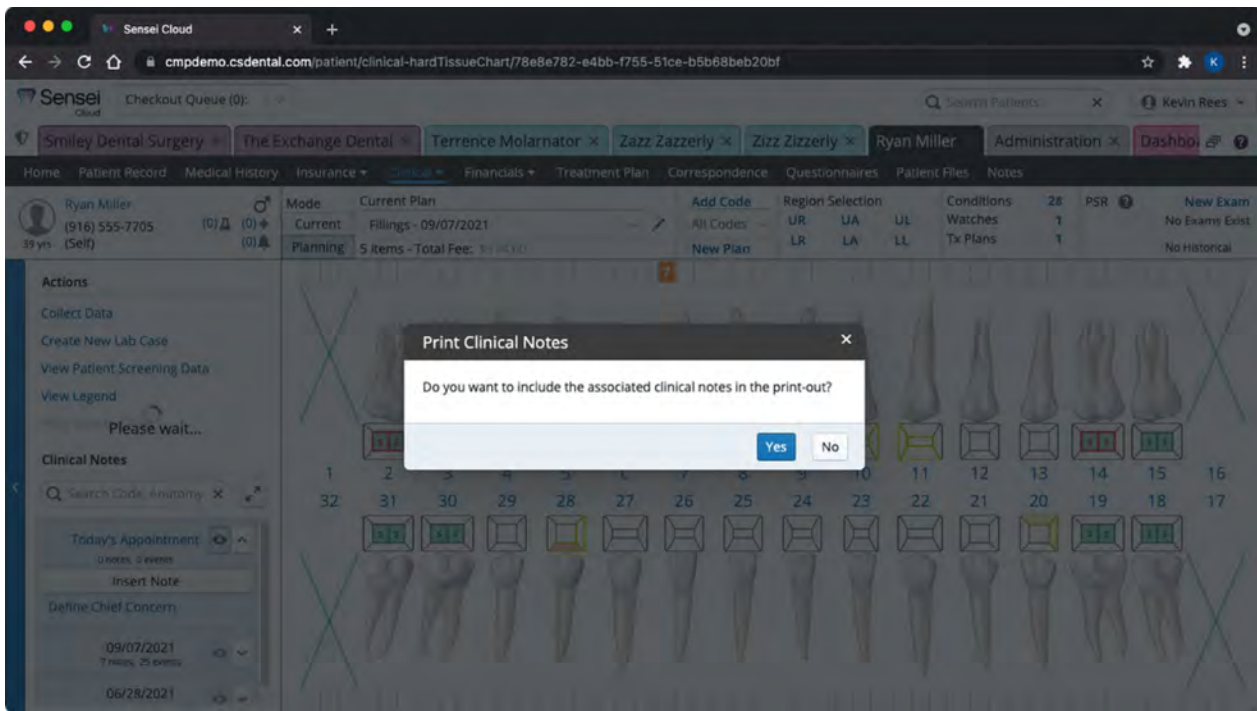
Clinical History
Wednesday, September 8, 2021

Ryan Miller
2001 Commerce Street
Alpharetta, GA 30009

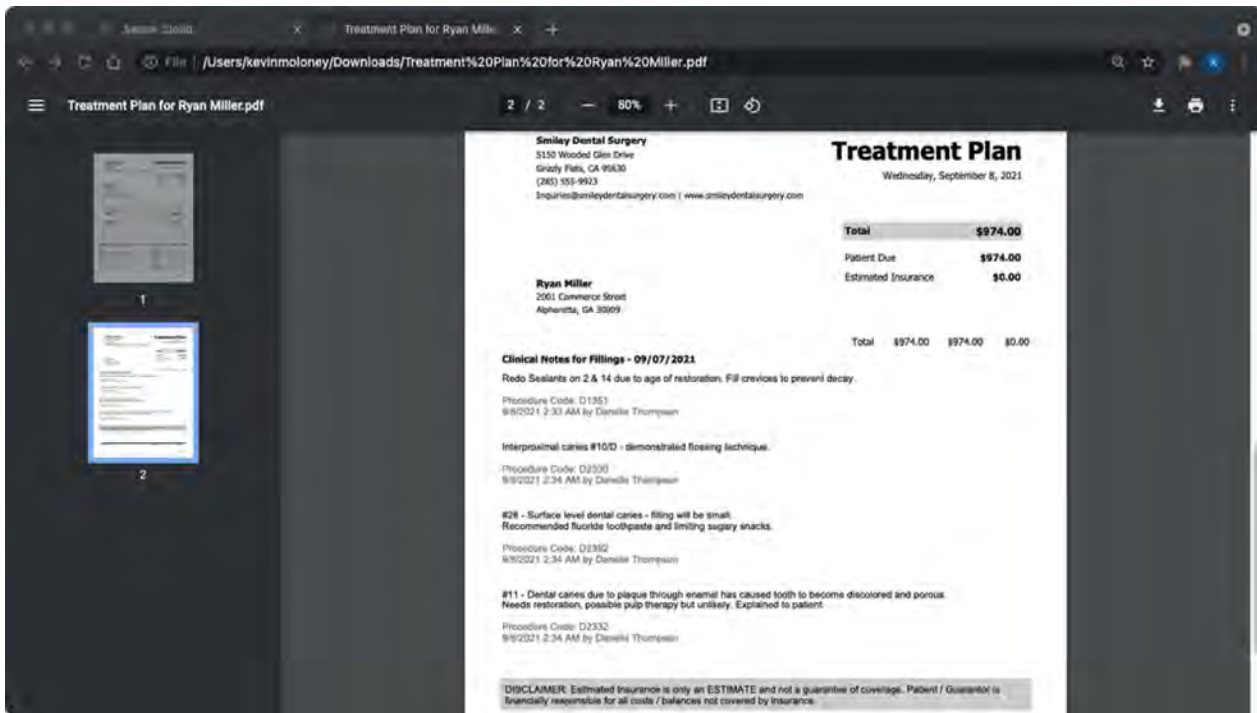
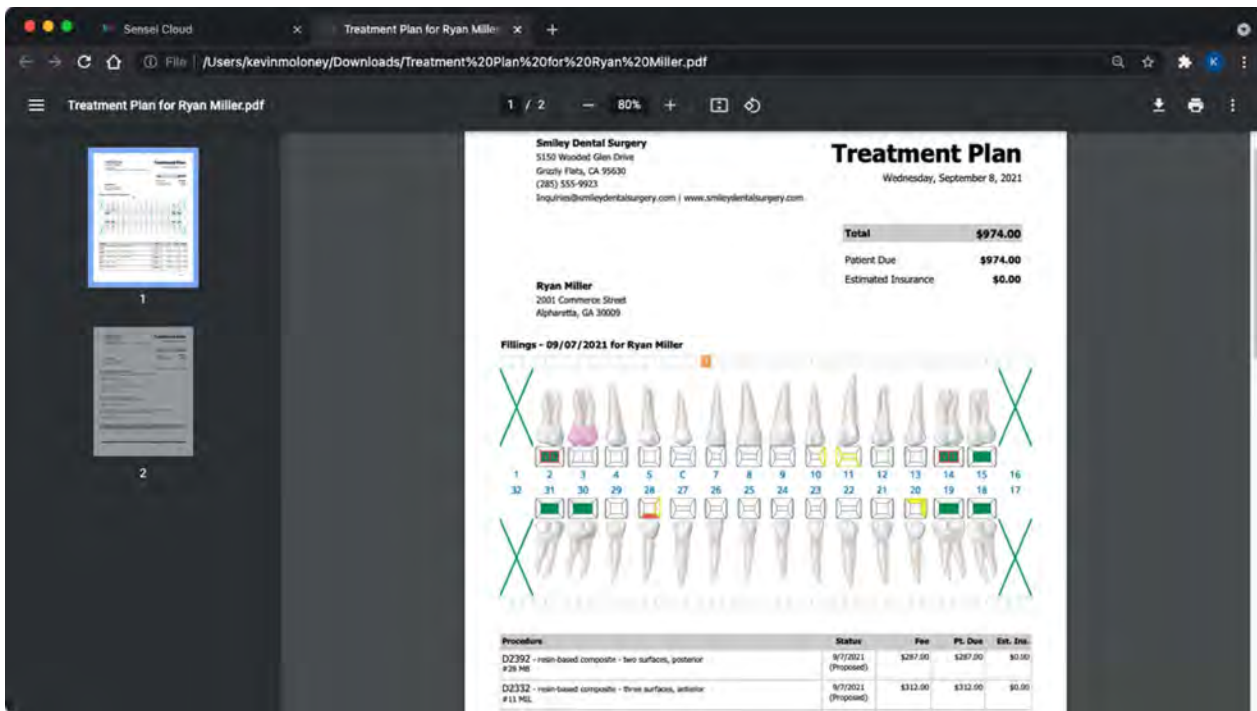


As previously mentioned, the treatment plan printout (via the Hard Tissue Chart) has also been enhanced to now include clinical notes. Click 'Print Selected Plan' in the side panel of the Hard Tissue Chart to generate a .PDF of the currently selected treatment plan. NOTE: You must be in 'Planning' charting mode with a treatment plan selected (other than the 'Unplanned Procedures' list) in order to generate the treatment plan printout. Before the printout is generated, you are now prompted to include (or not) clinical notes in the treatment plan summary.





In addition to the chart graphic (displaying the plan's proposed procedures) and the financial summary of the proposed work, the printout now includes all clinical notes that were created from the time that the treatment plan was created and the date of printing (or the date on which the plan was completed, whichever is first). NOTE: As with the patient's clinical history, 'clinical notes' only refers to those day- and event-based rich text notes entered, not the underlying clinical events themselves.



Lastly, in both cases, copies of the generated .PDFs are stored in the patient's correspondence repository [Patient Tab > Correspondence]. The files are automatically named ('Clinical History for {Patient Name}' or 'Treatment Plan for {Patient Name}') and categorized ('Clinical') accordingly. As with all patient correspondence, these files can be previewed and downloaded at any time.

The screenshot displays the 'Patient Correspondence' page for Ryan Miller. On the left, there are action buttons for 'Send Correspondence' and 'Send Email', along with a search bar and filter options. The main area contains a table of correspondence items:

File Name	Category	Template Name	Modality	File ...	Creation Date	Created By
Treatment Plan for Ryan Miller #6.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/08/2021	Dr. Kevin Rees
Treatment Plan for Ryan Miller #5.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Treatment Plan for Ryan Miller #4.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Treatment Plan for Ryan Miller #3.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Treatment Plan for Ryan Miller #2.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Treatment Plan for Ryan Miller.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Clinical History for Ryan Miller #4.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Dr. Kevin Rees
Clinical History for Ryan Miller #3.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Clinical History for Ryan Miller #2.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson
Clinical History for Ryan Miller.pdf	Clinical	Ad-Hoc Letter	Letter	pdf	09/07/2021	Danelle Thompson

We hope that these updates help to support your patient documentation and communication workflows, providing you with an easy method to extract and distribute details of your documented patient care. We look forward to your feedback on how to further improve these clinical 'reports'.

Removing Automatic Payments from Orthodontic Contracts

With this update, you can easily stop automatic payments from being processed as part of an active orthodontic contract [Patient Tab > Financials > Contracts]. When editing a pending or active contract that has automatic payments set up, click the new 'Remove Automatic Payments' hyperlink. This removes the stored payment method (e.g., credit card) from the contract, preventing the card from being automatically charged again in the future. NOTE: This will not impact any existing payments that have already been posted using the stored card.

Contracts for Frank Beltran

Field	Value	Field	Value
Description	8090 Comprehensive Ortho Tx ...	Last Charge	\$159.00 on 08/05/2021
Net Amount	\$3,816.00	Next Due	\$159.00 on 09/05/2021
Start Date	10/05/2020		

Automatic Payments

Cardholder	Frank Beltran	Payment Method	MC *6506 exp 11/25
Payment Frequency	Monthly	Payment Amount	\$159.00
Payment Day	5th	Final Payment Am...	\$159.00
Payment Start Date	11/05/2020	# of payments	24

Payment History and Schedule

Date	Payment #	Amount	Balance
11/05/2020	1 of 24	\$159.00	\$3,657.00

Contracts for Frank Beltran

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Start Date	10/05/2020		

Automatic Payments

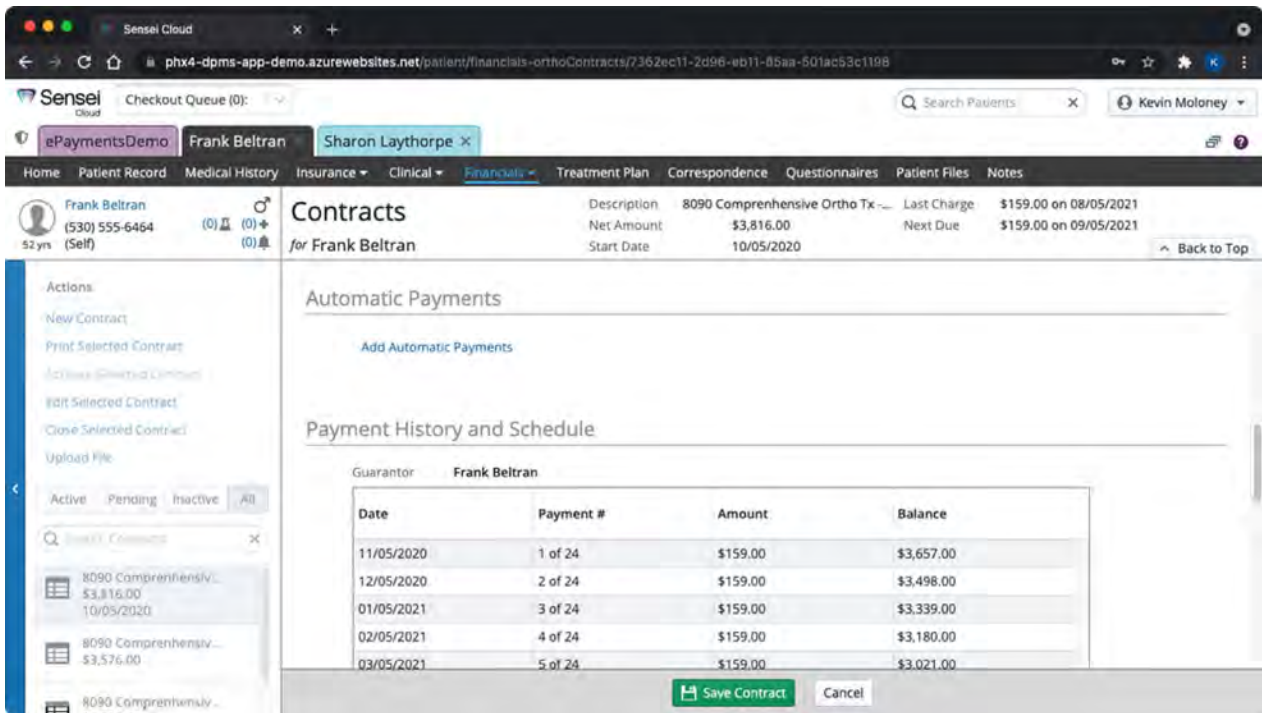
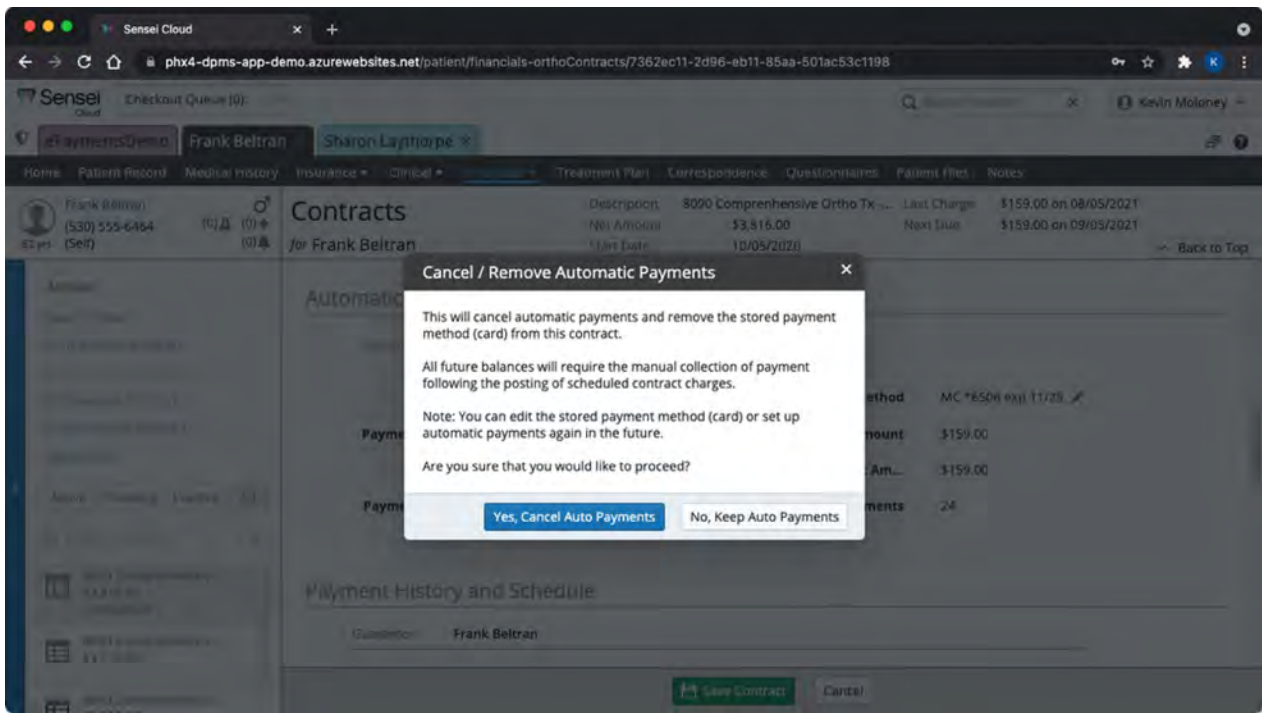
Cardholder	Frank Beltran	Payment Method	MC *6506 exp 11/25
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Payment Day	5th	Final Payment Am...	\$159.00
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Payment History and Schedule

Date	Payment #	Amount	Balance
11/05/2020	1 of 24	\$159.00	\$3,657.00

Save Contract Cancel

You are prompted with a confirmation dialog that explains the results of your action. Simply put, the card will no longer be automatically charged each billing period (based on the contract's guarantor schedule) and payments against future contract charges will need to be manually posted. Click 'Yes, Cancel Auto Payments' and then 'Save Contract' to finalize the contract updates. NOTE: If you accidentally removed the stored payment method from the contract, then simply cancel the underlying contract changes and the contract's automatic payments status is reverted.



We hope that this update makes it easier to manage your orthodontic contracts. Please send us your feedback on what additional enhancements might be helpful.

[0.1.6815 RELEASE UPDATES CONTINUED ON PART 2]

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