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Sensei Cloud Release 0.1.6913 (Part 2)

Sensei Cloud

Weekly Release

Build 0.1.6913 | October 10th, 2021

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

[0.1.6913 RELEASE UPDATES CONTINUED FROM PART 1]

Updates to Orthodontic Contracts

Based on input from our orthodontic customers, Sensei Cloud has significantly extended the capabilities of its orthodontic contract functionality. This includes the ability to define more about the related course of treatment, to specify multiple CDT billing codes to submit on insurance claims, to backdate

the treatment start date, to mark the guarantor responsibility as 'paid in full', and have more control over the initial (and ongoing) charge dates of the contract's schedules, among other enhancements. These updates should provide you with more flexibility when creating and managing your orthodontic contracts.

When creating a new orthodontic contract, you are now able to better identify the contract and its related course of treatment [Patient Tab > Financials > Contracts]. The 'Description' field is used to help distinguish contract-based ledger transactions. New fields have also been added to better track treatment information. This includes the 'Treatment' field, which provides a user-defined list of values to specify the type or course of treatment (e.g., Phase I, Phase II, Full Treatment, etc.) covered by the contract. You can define additional treatment types or select from those previously defined for use. The 'Treatment Modality' field is used to indicate whether the associated course of treatment is based on traditional mechanics or clear aligners.

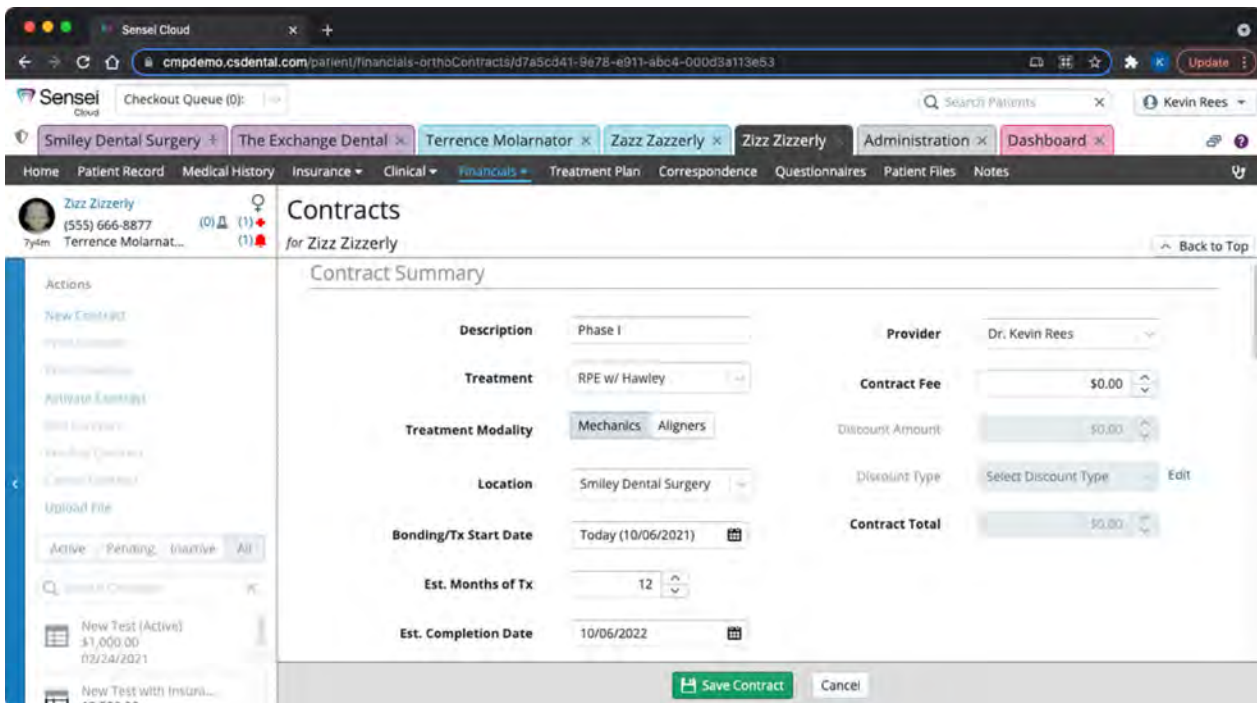
The screenshot displays the 'Contracts' form in the Sensei Cloud application. The form is titled 'Contract Summary' and is for patient 'Zizz Zizzerly'. The fields are organized as follows:

Description	Phase I	Provider	Dr. Kevin Rees
Treatment	[Search]	Contract Fee	\$0.00
Treatment Modality	[Clear Aligners, Full Braces]	Discount Amount	-\$0.00
Location	New treatment	Discount Type	Select Discount Type
Bonding/Tx Start Date	Today (10/06/2021)	Contract Total	\$0.00
Est. Months of Tx	12		
Est. Completion Date	10/06/2022		

At the bottom of the form, there are 'Save Contract' and 'Cancel' buttons.

Contract Summary

Description	Phase I
Treatment	RPE w/ Hawley
Treatment Modality	Mechanics Aligners
Location	Smiley Dental Surgery



The 'Proposed Start Date' field has been renamed 'Bonding/Tx Start Date' and now accommodates the selection of a past date, giving you more flexibility to create a financial contract for treatment that has already started. This date is used as the date of service for insurance billing purposes. NOTE: This date cannot be set to a future date at the time of contract activation. Additionally, you are prompted to confirm your selection if you set the bonding / treatment start date to a date significantly in the past (e.g., more than 6 months ago).

Contract Summary

Description	< October 2021 >	Provider	Dr. Ke
Treatment	Su Mo Tu We Th Fr Sa 26 27 28 29 30 1 2	Contract Fee	
Treatment Modality	3 4 5 6 7 8 9 10 11 12 13 14 15 16	Discount Amount	
Location	17 18 19 20 21 22 23 24 25 26 27 28 29 30	Discount Type	Select
Bonding/Tx Start Date	31 1 2 3 4 5 6	Contract Total	
	10/01/2021		
Est. Months of Tx	12		
Est. Completion Date	10/01/2022		

Contract Summary

Description	< March 2021 >	Provider	
Treatment	Su Mo Tu We Th Fr Sa 28 1 2 3 4 5 6	Contract Fee	
Treatment Modality	7 8 9 10 11 12 13 14 15 16 17 18 19 20	Discount Amount	
Location	21 22 23 24 25 26 27 28 29 30 31 1 2 3	Discount Type	
Bonding/Tx Start Date	03/15/2021	Contract Total	
Est. Months of Tx	12		
Est. Completion Date	03/15/2022		

Warning: Bonding / Treatment Start Date

The contract details currently indicate the bonding / treatment start date is set to 03/15/2021. This indicates that this contract's treatment has started significantly in the past. This will be the service date used for any insurance claims submitted for this contract.

Is this correct?

Yes, Activate Contract No, Edit Contract

Contract Summary

<p>Description</p> <p>Treatment</p> <p>Treatment Modality</p> <p>Location</p>	<p>Bonding/Tx Start Date</p> <p>Est. Months of Tx</p> <p>Est. Completion Date</p>	<p>Provider</p> <p>Contract Fee</p> <p>Discount Amount</p> <p>Discount Type</p> <p>Contract Total</p>
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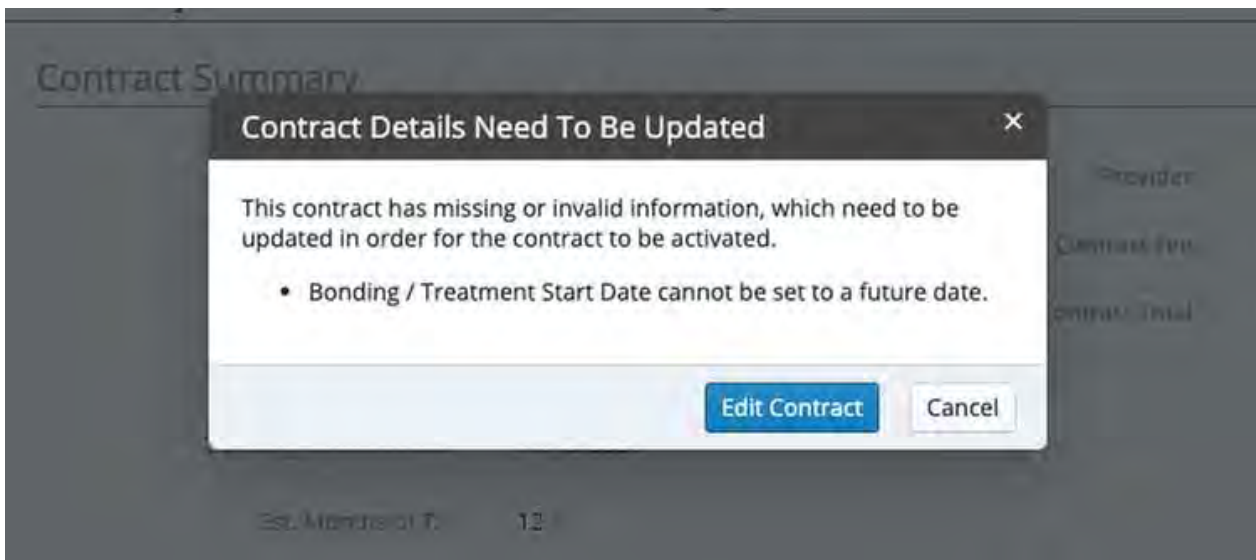
< November 2021 >

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

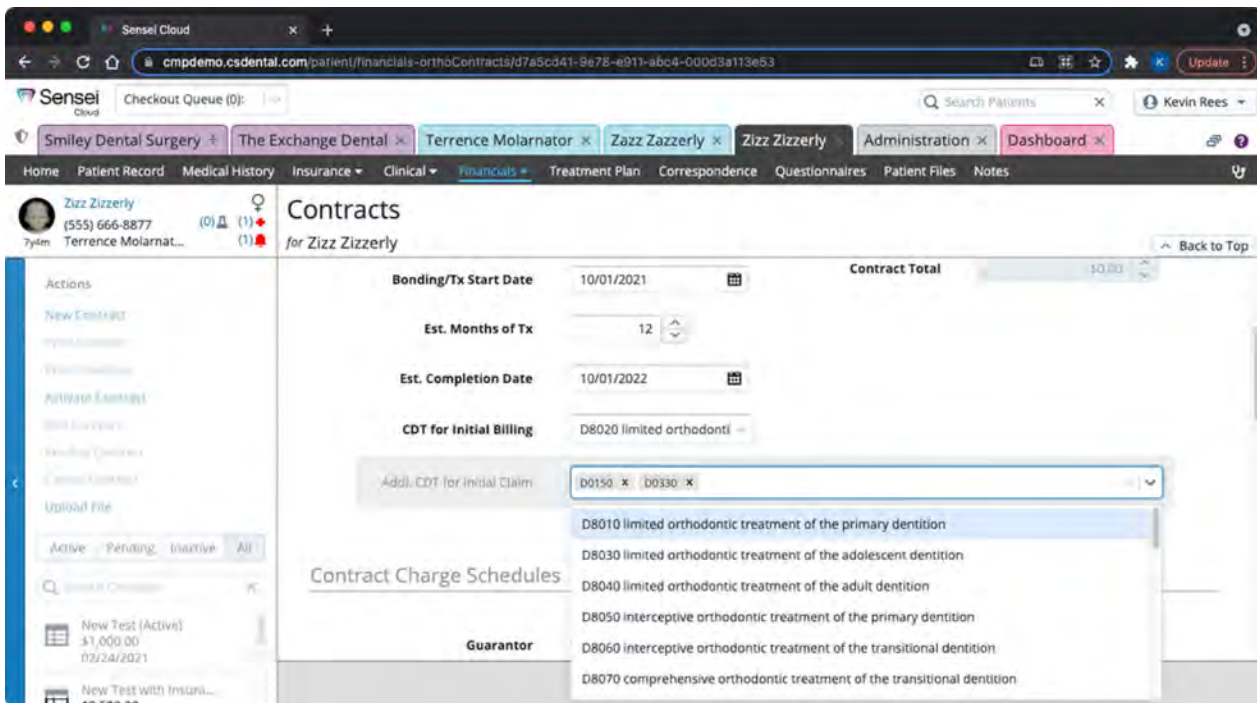
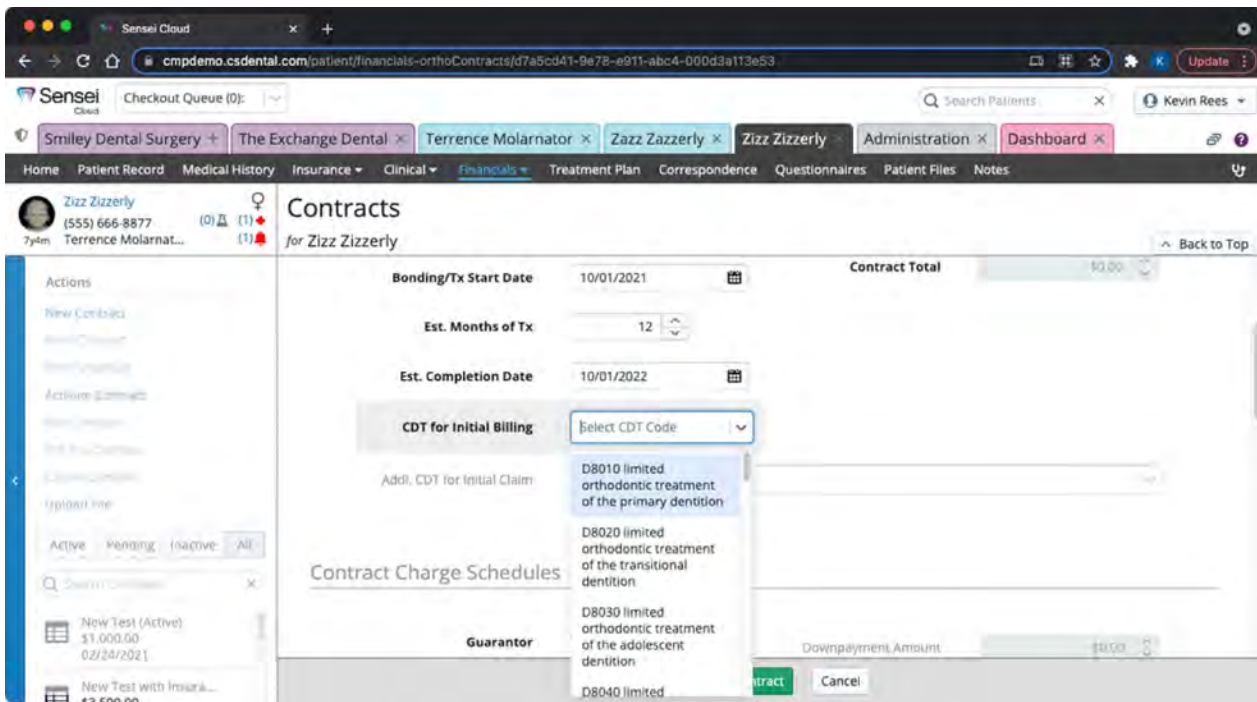
11/15/2021

12

11/15/2022

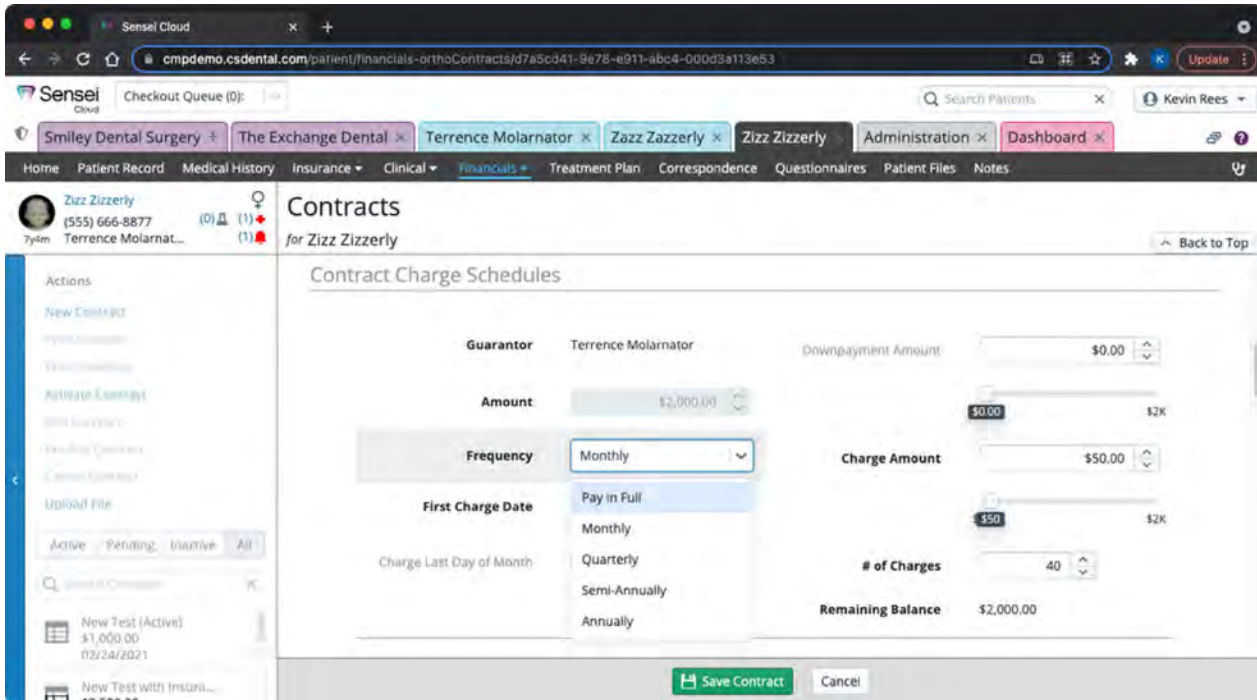
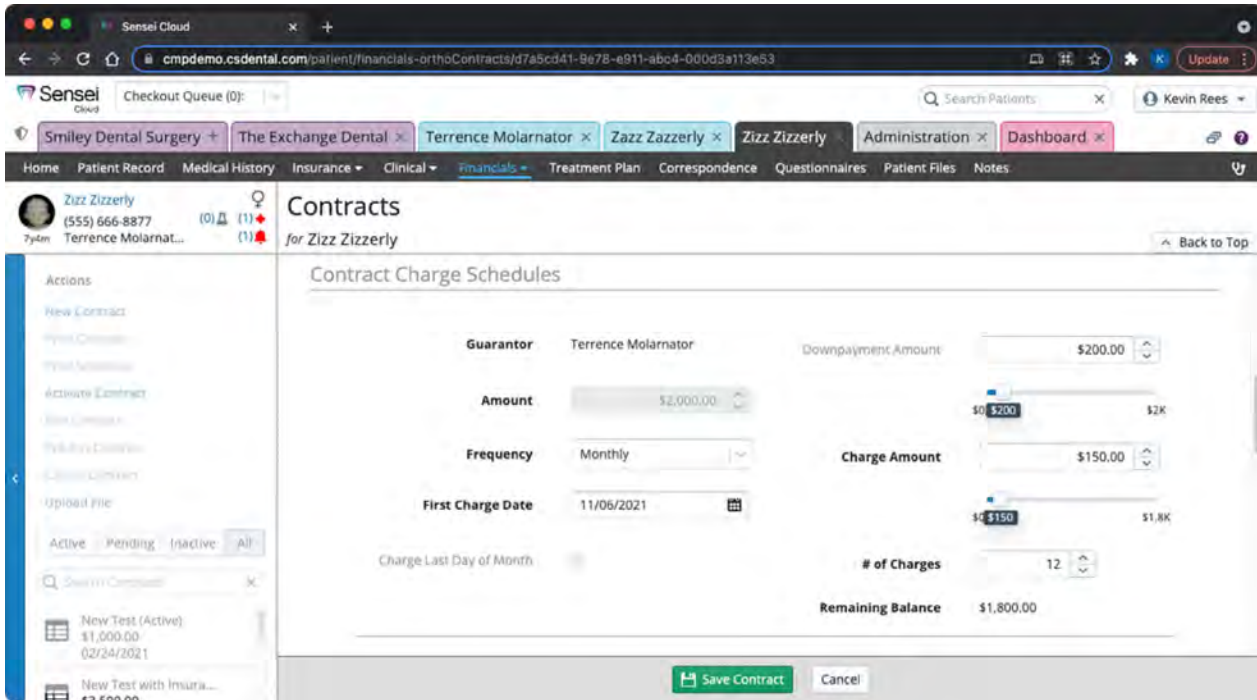


For billing purposes, you can now specify multiple CDT codes to submit on the initial service claim (generated upon contract activation), as well as the Continuation of Treatment (CoT) claims generated as the contract progresses (per the insurance schedules). The 'CDT for Initial Billing' field is used to define the primary code that assumes the contract's production, while the 'Addl. CDT for Initial Claim' field allows for the specification of additional CDT codes to submit. All codes are posted to the Patient Ledger (upon contract activation) and are included on the initial service claim. The 'CDT for COT Claims' and 'Addl. CDT for COT Claims' fields, within the insurance schedule details, operate the same way for Continuation of Treatment Claims. NOTE: For ease of use, ortho-specific CDT codes (e.g., D8000 series) are displayed by default. However, any CDT codes can be selected by searching and selecting the desired code. Multiple CDT codes can be selected for use in the 'Addl. CDT...' fields.



When defining the guarantor's responsibility and charge schedule, you now have more flexibility in defining the terms of the agreement. There is now a 'Pay in Full' option in the 'Frequency' field that makes the entirety of the guarantor's contract amount realized as a downpayment (e.g., made current) upon contract activation. This prevents future, scheduled (guarantor) contract charges from being posted to the ledger, but still allows for the insurance-based charges to post per their schedules. NOTE: Active, in-flight contracts cannot be marked as 'paid in full'. However, you can now pre-pay the guarantor's portion of the contract balance, as needed, using the new contract

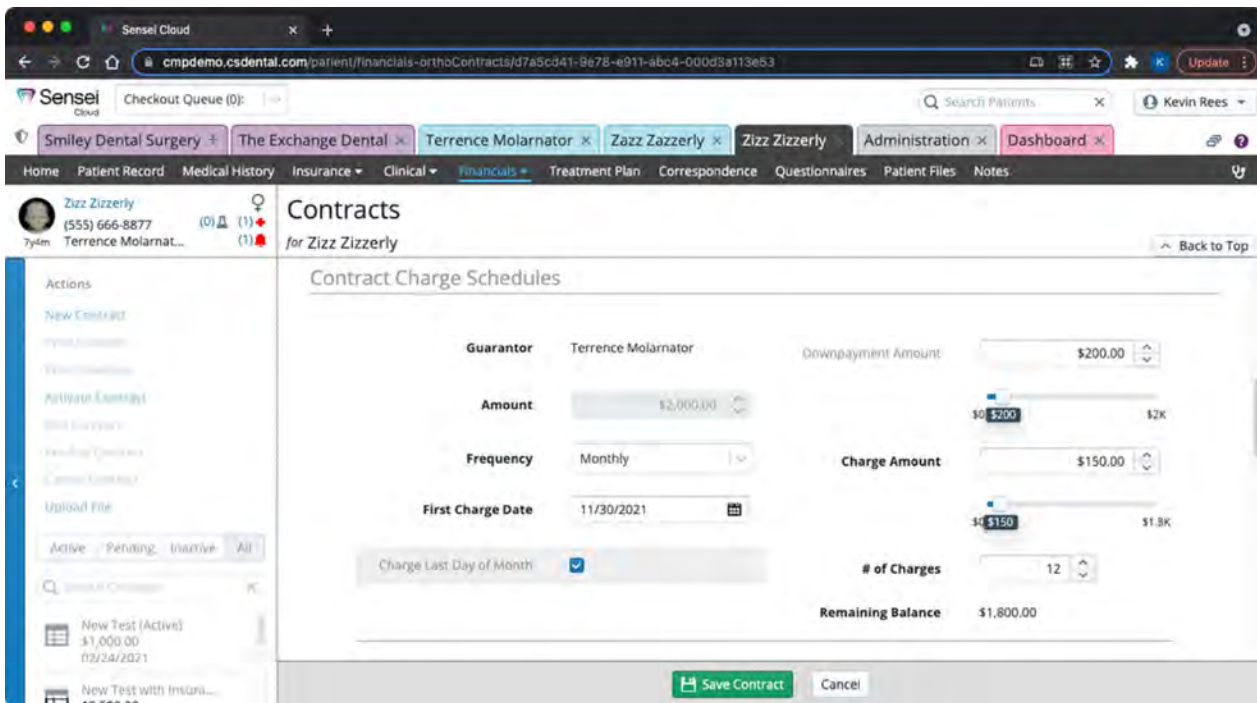
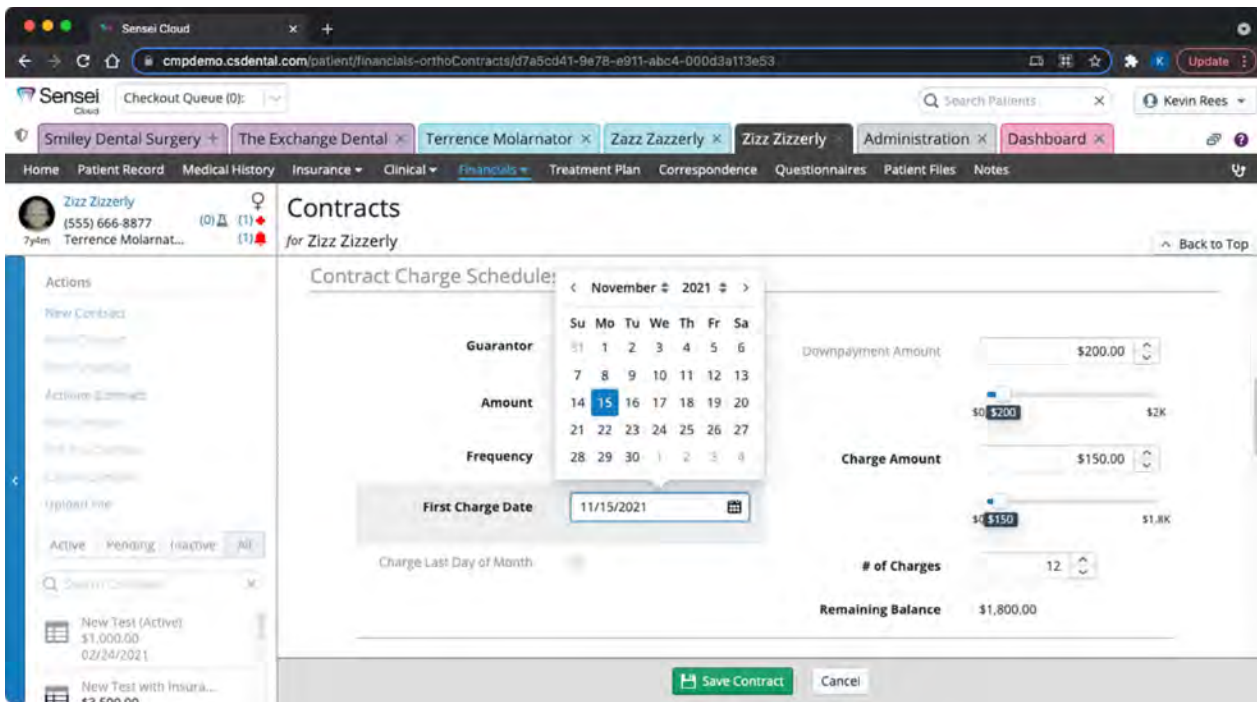
adjustment to realize some or all of the guarantor's remaining balance as current. This new functionality is discussed in detail in the next section of these release notes.



The screenshot displays the 'Contract Charge Schedules' form in the Sensei Cloud application. The form is for a patient named Zizz Zizzerly, with a guarantor of Terrence Molarnator. The contract details include a total amount of \$2,000.00, a frequency of 'Pay in Full', and a first charge date of 11/08/2021. The remaining balance is \$0.00. The form also includes a 'Charge Last Day of Month' checkbox and a 'Save Contract' button.

Field	Value
Guarantor	Terrence Molarnator
Amount	\$2,000.00
Frequency	Pay in Full
First Charge Date	11/08/2021
Downpayment Amount	\$2,000.00
Charge Amount	\$0.00
# of Charges	0
Remaining Balance	\$0.00

For those contracts not 'paid in full', you now have more flexibility in defining each charge schedule (guarantor and insurance). When creating a new contract (or editing a pending contract), in addition to defining the frequency with which charges are levied, you can now set a specific 'First Charge Date' for each schedule. This date determines when the first, periodic charge posts for each schedule. Additionally, there is a new checkbox control that enables you to always charge on the last day of the month, which becomes available if the 'First Charge Date' value selected is the final day of the associated month. NOTE: This is an update to the existing 'Bill Day' field, which only allowed for the definition of a day of the month to bill periodic charges, but offered no control over an initial delay from the start of the contract.



Periodic charges are posted on the same day each month (or based on the specified frequency period). However, once a contract is activated, you can choose to modify the 'Next Charge Date' whenever editing the active contract. This provides even more flexibility to accommodate needed modifications to the original charge schedule and sets a new periodic day to use for future charges. NOTE: The 'First Charge Date' and 'Next Charge Date' can be set to the current date (or any future date), but cannot be set in the past. If either date is set to a past date when activating or saving the contract, then you are presented with a validation error.

Contract Charge Schedules

Guarantor	Terrence Molarnator	Downpayment Amount	
Amount	\$2,000.00	Charge Amount	\$0
Frequency	Monthly	# of Charges	
First Charge Date	10/01/2021	Remaining Balance	\$1,800.00
Charge Last Day of Month	<input type="checkbox"/>		

First Charge Date cannot be in the past.

The screenshot shows the 'Contract Charge Schedules' form in the Sensei Cloud application. The form is for a contract for Zizz Zizzerly, with the guarantor Terrence Molarnator. The current state of the form is as follows:

Guarantor	Terrence Molarnator	Downpayment Amount	\$200.00
Amount	\$2,000.00	Charge Amount	\$150.00
Frequency	Monthly	# Chgs Remaining	12
Next Charge Date	11/15/2021	Remaining Balance	\$1,800.00
Charge Last Day of Month	<input type="checkbox"/>		

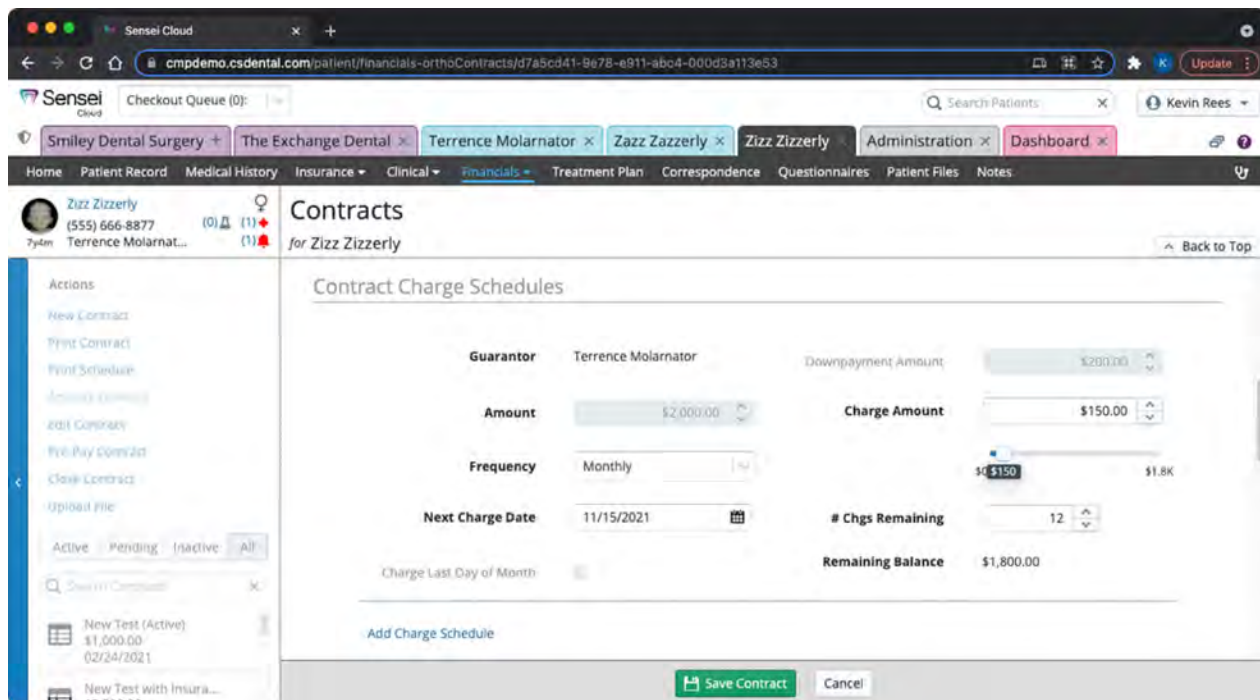
At the bottom of the form, there is a green 'Save Contract' button and a grey 'Cancel' button. The sidebar on the left contains a list of actions (New Contract, Print Contract, etc.) and a list of recent contracts, including 'New Test (Active)' and 'New Test with Insura...'.

Some minor enhancements have been added to the contract details to better communicate its current state as it progresses (and is possibly altered) over its normal lifespan. A 'Remaining Balance' indicator is now provided on each schedule (guarantor and insurance), providing a calculation of the remaining financial liability. This field automatically recalculates as the guarantor amount changes, a downpayment is defined, pre-payment adjustments are made, and periodic, recurring charges are posted. Additionally, the '# of Charges' field

(indicating the proposed number of charges for the schedule) becomes '# of Chgs Remaining' once the contract is activated, further providing a picture of each schedule's current progress.

Contract Charge Schedules

Guarantor	Terrence Molarnator	Downpayment Amount	\$200.00
Amount	\$2,000.00	Charge Amount	\$150.00
Frequency	Monthly	# of Charges	12
First Charge Date	11/15/2021	Remaining Balance	\$1,800.00
Charge Last Day of Month	<input type="checkbox"/>		



The 'Charge History and Schedule' tables (formerly 'Proposed Payment Schedule') have been enhanced to provide some summary information for each schedule, as well as the current status of each charge (e.g., 'Proposed' for pending contracts and 'Scheduled' vs. 'Charged' for active contracts). Click 'Print Schedule' in the side panel to generate a .PDF or physical copy of the guarantor's schedule, which can be shared with the patient or guarantor and reflects the schedule's current state.

Proposed Charge Schedule

Guarantor	Guarantor Amount	Downpayment	Financed Amount
Terrence Molarnator	\$2,000.00	\$200.00	\$1,800.00

Date	Charge #	Status	Amount	Remaining Balance
11/30/2021	1 of 12	Proposed	\$150.00	\$1,650.00
12/31/2021	2 of 12	Proposed	\$150.00	\$1,500.00
01/31/2022	3 of 12	Proposed	\$150.00	\$1,350.00
02/28/2022	4 of 12	Proposed	\$150.00	\$1,200.00
03/31/2022	5 of 12	Proposed	\$150.00	\$1,050.00
04/30/2022	6 of 12	Proposed	\$150.00	\$900.00
05/31/2022	7 of 12	Proposed	\$150.00	\$750.00
06/30/2022	8 of 12	Proposed	\$150.00	\$600.00

Save Contract Cancel

Proposed Charge Schedule

Guarantor	Amount	Frequency	Bill Day	Charge Amount:
Terrence Molarnator	\$2,000.00	Monthly	15	\$150.00

Date	Charge #	Status	Amount	Remaining Balance
11/30/2021	1 of 12	Proposed	\$150.00	\$1,650.00
12/31/2021	2 of 12	Proposed	\$150.00	\$1,500.00
01/31/2022	3 of 12	Proposed	\$150.00	\$1,350.00
02/28/2022	4 of 12	Proposed	\$150.00	\$1,200.00
03/31/2022	5 of 12	Proposed	\$150.00	\$1,050.00
04/30/2022	6 of 12	Proposed	\$150.00	\$900.00
05/31/2022	7 of 12	Proposed	\$150.00	\$750.00
06/30/2022	8 of 12	Proposed	\$150.00	\$600.00
07/31/2022	9 of 12	Proposed	\$150.00	\$450.00
08/31/2022	10 of 12	Proposed	\$150.00	\$300.00
09/30/2022	11 of 12	Proposed	\$150.00	\$150.00
10/31/2022	12 of 12	Proposed	\$150.00	\$0.00

Print 1 page

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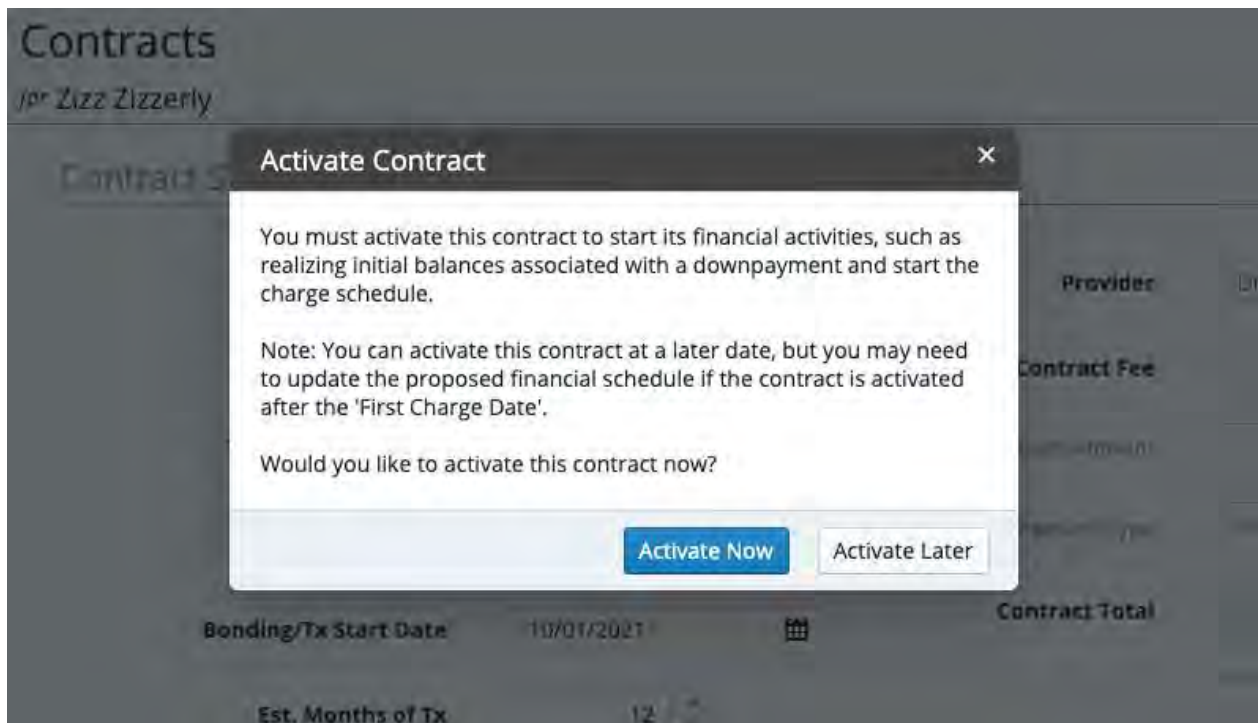
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More settings

Cancel Save

To help prevent pending contracts from becoming 'stale' or never getting activated (and not realizing the related production), you are now prompted to activate a contract whenever saving a new contract or updating a pending contract. REMINDER: Contract activation is a necessary step to realize its production, generate insurance claims, post the initial ledger transactions (such as discounts and downpayments), as well as to start the periodic, recurring charge schedules.



Finally, activation of a contract is now linked to the course of treatment (and the 'Treatment Tracker') in the banner of the patient's Orthodontic Clinical Summary [Patient Tab > Clinical > Orthodontic Clinical Summary]. Upon contract activation, the value used to define the 'Treatment' field in the contract is displayed as the 'Current Tx' in the Ortho Clinical Summary. The 'Bonding/Tx Start Date' and 'Est. Completion Date' are used to calculate the 'Tx Track' indicator, which provides a summary of the projected treatment time remaining based on the contract's original proposal. NOTE: If the patient already has current treatment in progress (e.g., manually started via the Ortho Clinical Summary), then contract activation automatically ends the current treatment and starts treatment tracking based on the now active contract.

We hope that all of these enhancements to the orthodontic contract functionality provide support for your financial workflows, providing your practice with more flexibility in the construction and management of your financial agreements. Please send us your feedback on what additional enhancements would improve your ortho contract-based workflows.

[0.1.6913 RELEASE UPDATES CONTINUED ON PART 3]

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