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MOD kevin_moloney

Moderator



10-24-2021 04:44 PM

Sensei Cloud Release 0.1.6971 (Part 1)

Sensei Cloud

Weekly Release

Build 0.1.6971 | October 24th, 2021

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

[US Only] Secondary Claim Support (AKA Billing Multiple Payers)

In response to customer feedback, Sensei Cloud now supports the creation and management of secondary - and subsequent - insurance claims. This enables you to request reimbursement from all insurance policies that may provide coverage for a patient's treatment. You can now generate a series of related claims (e.g., primary, secondary, tertiary, etc.) for a set of billable

services, based on a patient's defined insurance coverage. With this update, you are now prompted to 'take next steps' once an existing insurance claim reaches its terminal state (e.g., posting of an insurance payment or manually indicating the claim is 'closed').

Review of Defining Patient Insurance Coverage

Sensei Cloud supports the definition of as many sources of insurance coverage (e.g., policies) as needed for a patient [Patient Tab > Patient Record]. The priority order (or type) of the coverage is also defined via the patient's record, with a 'Primary' or 'Secondary' (or beyond) assignment for each policy. NOTE: Each defined insurance policy beyond the 'secondary' coverage is given the general designation of 'other'. Whenever you create a new insurance claim the 'primary' policy is selected by default, but any of the patient's active, available policies can be selected.

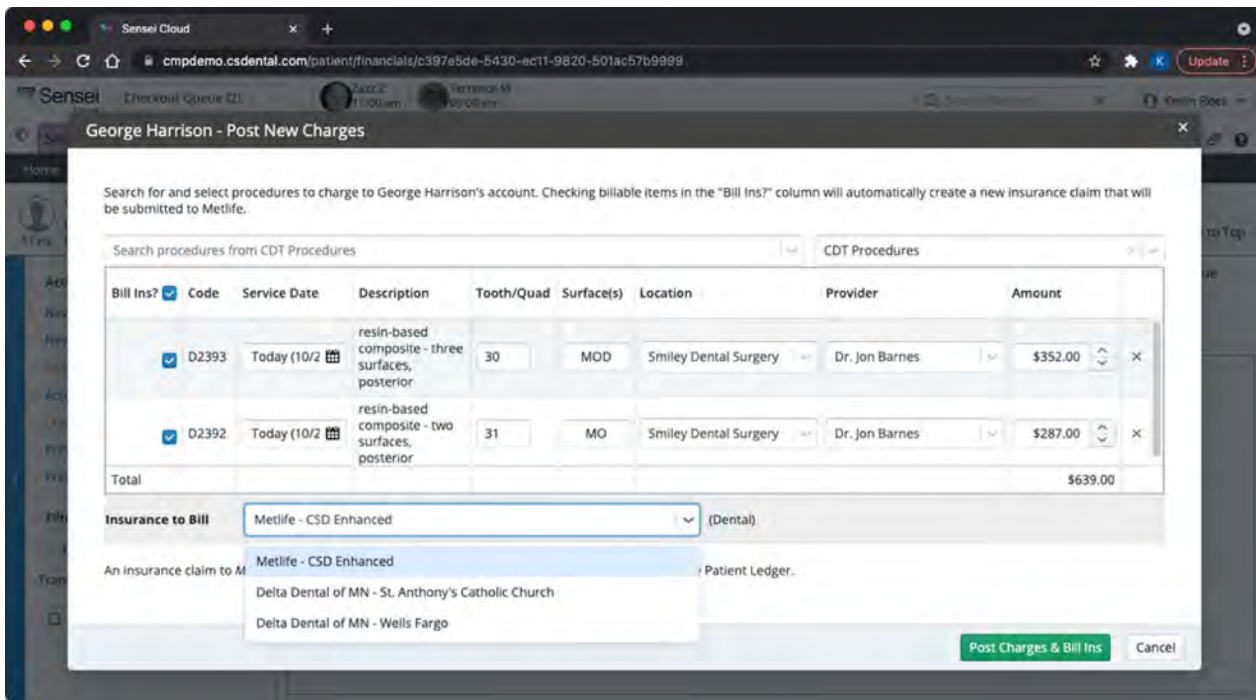
The screenshot displays the Sensei Cloud Patient Record interface for George Harrison. The page title is "Patient Record for George Harrison". The left sidebar contains a navigation menu with sections: "Actions" (Edit Patient Record), "Jump To" (Patient Record Control, Personal Information, Contact Information, Portrait, Additional Information, Patient Referrals, Responsible Parties, Insurance Information, Connected Patients, Patient Preferences, Recare Appointments, Medical Alerts), and "Insurance Information".

The main content area is titled "Insurance Information" and contains a table of active insurance policies:

Policy Holder	Policy	Group #	Status	Type		
George Harrison	CSD Enhanced MetLife	555111000	Active (as of 01/01/2019)	Primary	Edit	Remove
George Harrison	St. Anthony's Catholic Church Delta Dental of MN	71333337	Active (as of 01/01/2019)	Secondary	Edit	Remove
Grace Harrison	Wells Fargo Delta Dental of MN	98743178	Active (as of 01/01/2019)	Other	Edit	Remove

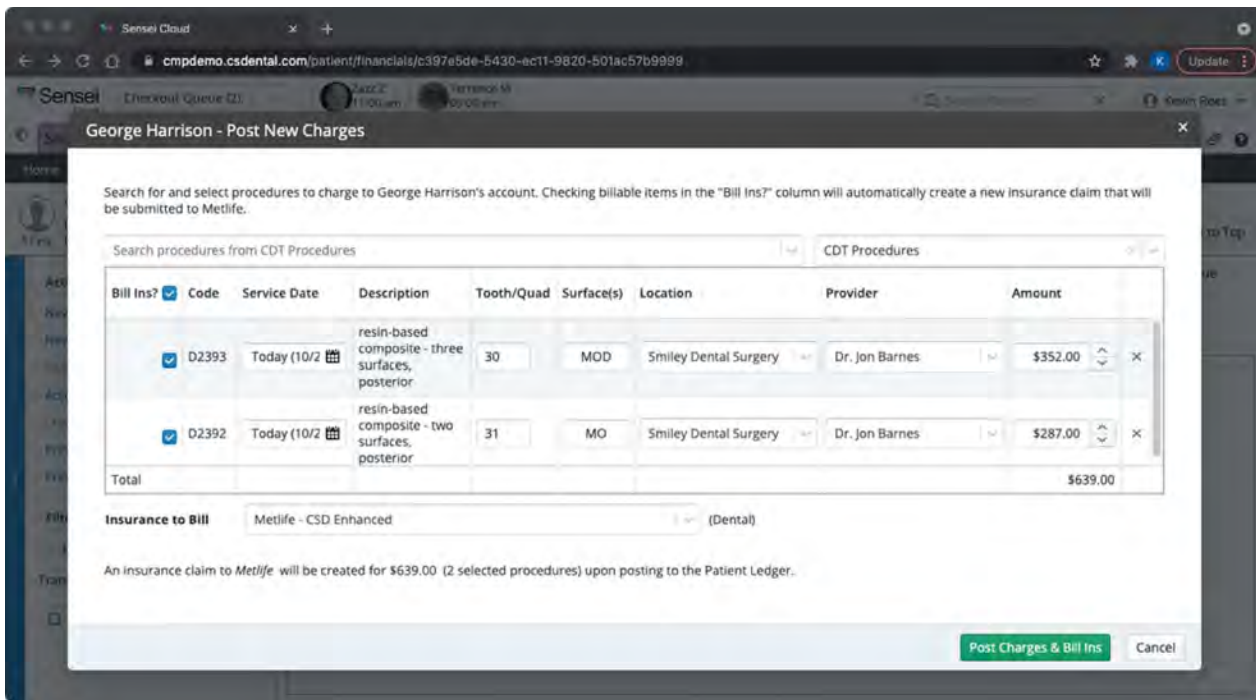
Below the table is a link "Add Insurance Policy".

The "Connected Patients" section is currently empty. At the bottom of the page, there are buttons for "Save Patient", "Cancel", and a checkbox for "Display required field only".



Review of Generating a Primary (Initial) Insurance Claim

For patients with at least one defined insurance policy, an insurance claim can be created at the time of charge posting. When posting new charges - via the patient's Ledger (generally) [Patient Tab > Financial > Ledger] or the Checkout Queue (upon completion of an appointment) [Application Framework > Checkout Queue] - simply check the 'Bill Ins?' option for each billable procedure and select the applicable policy to bill. NOTE: Sensei Cloud suggests the patient's 'primary' coverage - as defined in the Patient Record - by default. In order to bill the procedures, the selected policy must have been active as of the Date of Service. Finally, click 'Post Charges & Bill Ins' to post the charges to the patient ledger and generate the primary (initial) claim record. Notifications are displayed for both the posted charges (with a link to the patient's Ledger) and the created claim (with a link to the patient's Claims Management list).



2 new charges for \$639.00 have been posted to the account of George Harrison. [View Ledger](#) X

An insurance claim to Metlife for \$639.00 has been created. This claim may require some attachments for submission [View Claim](#) X

IMPORTANT: As previously mentioned, the patient's 'primary' policy - as defined in the Patient Record - is selected by default when creating the initial claim for a set of unbilled services. However, any of the patient's applicable policies can be chosen as the target payer for the claim. The policy chosen for the initial claim is considered 'primary' for the resulting chain of related claims generated for a set of services, regardless of its designation in the Patient Record. In other words, coverage order for any given 'claim chain' is ultimately determined by which policy is chosen at the time of claim creation for each successive claim. You have full control over the order in which the patient's available policies are billed (or not).

Depending on your office configuration for claim handling [Administration Tab > Practice Settings > Claim Rules] and integration with the NEA *FastAttach* service, the initial claim record may require some additional attention prior to its submission to the clearinghouse. If your office has determined that each new claim should be reviewed prior to submission (e.g., 'Hold For Review'), then you need to manually submit the claim to queue it for submission to the

clearinghouse. If the payer rules (as defined by NEA *FastAttach*) determine that the billed services require supporting documentation, then you may need to add some (electronic) attachments to the claim record before submission. Once this initial state of 'Pending Review' or 'Awaiting Attachments' is resolved, the claim is initially 'Queued' and finally 'Submitted' (to the clearinghouse).

Claim Rules
for All Locations

Define how your practice prefers to handle newly created insurance claims. Auto Transmit will automatically queue claims for transmission to the Carestream Dental clearinghouse, when possible. Note that there may be times when manual intervention is needed, such as when payer rules require that electronic attachments are to be sent with the claim. Hold For Review will hold all new insurance claims in the queue, giving users an opportunity to review before transmission.

Auto Transmit Hold For Review

Save Cancel

Claims Management
For George Harrison

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Awaiting Attachments		Smiley Dental Surgery	Svc	P	Dr. Jon Barnes	10/22/...	Metlife	CSD Enhanced	D2393...	\$63...	\$0.00

Claim Summary (Primary)

Claim Does Not Require Attachments - Click Skip Attach to Submit Without Attachments

George Harrison (470) 481-8471 (Self) 57 yrs
Created On 10/22/2021
Policyholder George Harrison
Attachment Ref # Add Attachments

2 codes performed at Smiley Dental Surgery for a total of \$639.00

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D2393	resin-based composite - three surfaces, posterior	30	MOD	Dr. Jon Barnes	October 22, 2021	\$352.00	None
D2392	resin-based composite - two surfaces, posterior	31	MO	Dr. Jon Barnes	October 22, 2021	\$287.00	None

Skip Attach Submit Claim Print Claim Apply Payment Edit Add Info Update Status Cancel Claim

Review of 'Closing' an Existing Insurance Claim

Once the remittance advice or EOB for the primary (initial) claim is received, you can appropriately 'close' the initial (primary) claim. This includes the posting of any insurance payment received or manually updating the claim record to a 'terminal' status (e.g., 'Closed', 'Completed', 'Denied', 'Paid', or 'Rejected'). If payment has not been received, you can manually update the claim record's status (once in a 'Submitted' (or 'Printed') state) to one of the aforementioned 'terminal' states by clicking 'Update Status' in the Claim Summary UI [Patient Tab > Insurance > Claims Management > {Select Claim}]. If remittance has been received, navigate to the patient's Ledger, click 'New Payment' and then specify the payment amount, select the 'Insurance' payment type, select the associated claim, and finally click 'Post Payment' [Patient Tab > Financials > Ledger]. This posts the payment to the patient's ledger and automatically puts the associated claim in a 'Paid' status. NOTE: The 'Claim Number' search control when posting an insurance payment has been enhanced, making it easier to find and identify the claim associated with the payment received. You can now search by partial claim number (using the last, unique digits of the claim ID), payer name, or service date. All of these details are now displayed in the list of available claims, along with each claim's creation date, billed amount, and coverage type (e.g., P for primary, S for secondary, O for tertiary or successive).

George Harrison - Post New Payment

George Harrison \$371.20 \$639.00 \$267.80

Search

Payment Information

Location: Smiley Dental Surgery

Acceptance Date: Today (10/22/2021)

Payment Type: Insurance

Claim Number: Select an insurance claim

Reference: 114000000000257P (P)

Payer: Metlife

Service Date: 10/22/2021

Created On: 10/22/2021

Billed: \$639.00

The insurance claim to which this payment is being applied

Post Payment Cancel

Sensei Cloud
 cmpdemo.csidental.com/patient/financials/c397e5de-5430-ec11-9820-501ac57b9999

Checkout Queue (2): Zazz Z 11:00 am Terrence M 09:00 pm

Smiley Dental Surgery + The Exchange Dental + Terrence Molarnator + Zazz Zazzerly + Zizz Zizzerly + George Harrison + Administration + Dash

Home Patient Record Medical History Insurance Clinical Financials Treatment Plan Correspondence Questionnaires Patient Files Notes

George Harrison (470) 481-8471 (Self) 57 yrs

Ledger

for George Harrison

Last Payment: \$371.20 (Oct 22, 2021)
 Last Statement: N/A
 Next Appointment: Nov 3, 2021

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Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$267.80	\$0.00	\$267.80	\$267.80	\$0.00	\$0.00	\$0.00	-\$371.00	\$638.80

Balance Exists

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
10/22/2021	10/22/2021	Insurance	Payment Insurance - Claim #: 114000000000257P	-\$371.20	\$267.80	\$267.80

Payment Details

Adjust This Payment

Trans. Type	Payment	Location	Smiley Dental Surgery	Amount	\$371.20
Payment Type	Insurance	Is Split Payment	No	Already Applied	\$0.00
Posted By	Kevin Rees at 9:37 am	To be Applied			\$371.20
Reference	Claim #: 114000000000257P				
Full Comment	Prim Ins pmt				

10/22/2021	10/22/2021	D2392	(#31 MO) resin-based composite - two surfaces, posterior	\$287.00	\$639.00	\$639.00
10/22/2021	10/22/2021	D2393	(#30 MOD) resin-based composite - three surfaces,	\$352.00	\$352.00	\$352.00

Sensei Cloud
 cmpdemo.csidental.com/patient/insurance-claimsManagement/c397e5de-5430-ec11-9820-501ac57b9999

Checkout Queue (2): Zazz Z 11:00 am Terrence M 09:00 pm

Smiley Dental Surgery + The Exchange Dental + Terrence Molarnator + Zazz Zazzerly + Zizz Zizzerly + George Harrison + Administration + Dash

Home Patient Record Medical History Insurance Clinical Financials Treatment Plan Correspondence Questionnaires Patient Files Notes

George Harrison (470) 481-8471 (Self) 57 yrs

Claims Management

for George Harrison

Back to Top

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Paid		Smiley Dental Surgery	Svc	P	Dr. Jon Barnes	10/22/...	Metlife	CSD Enhanced	D2393,...	\$63...	\$37...

Claim Summary (Primary)

View Claim Details

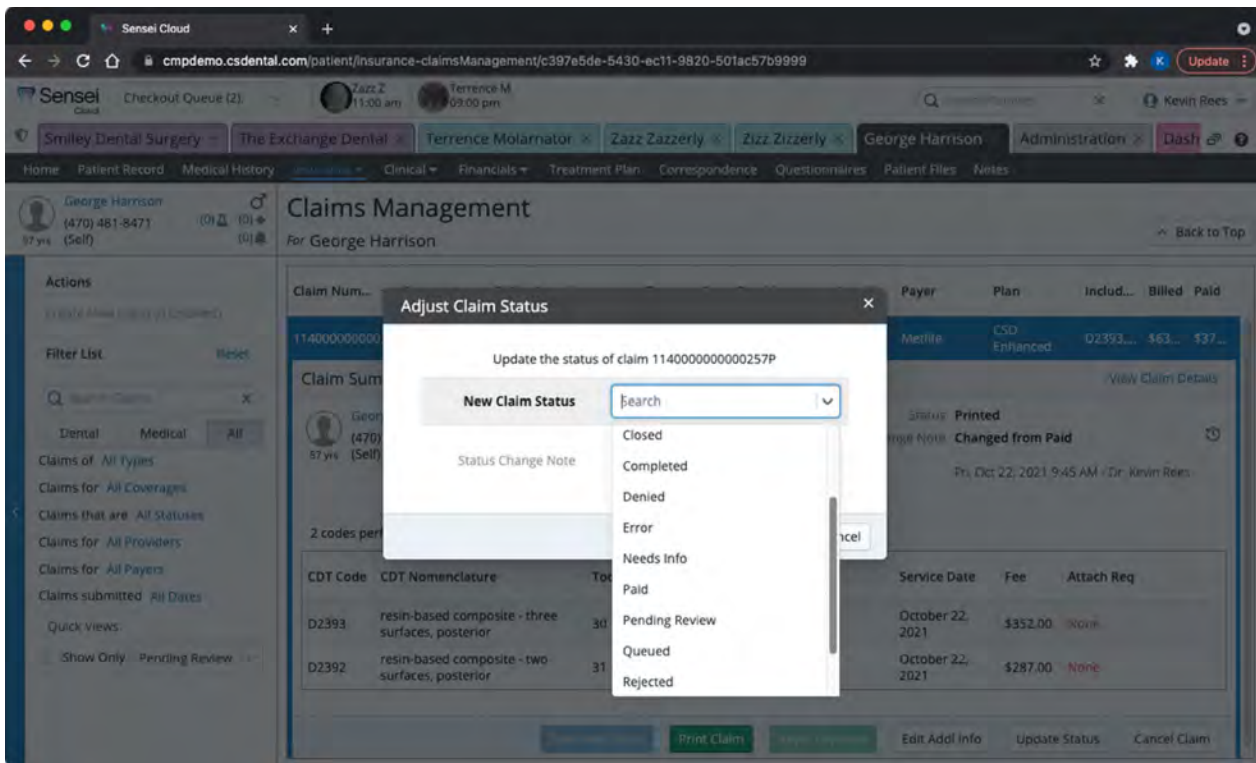
George Harrison (470) 481-8471 (Self) 57 yrs

Created On: 10/22/2021
 Status: Paid
 Policyholder: George Harrison
 Status Change Note: [icon]
 Attachment Ref #: Not Specified

2 codes performed at Smiley Dental Surgery for a total of \$639.00

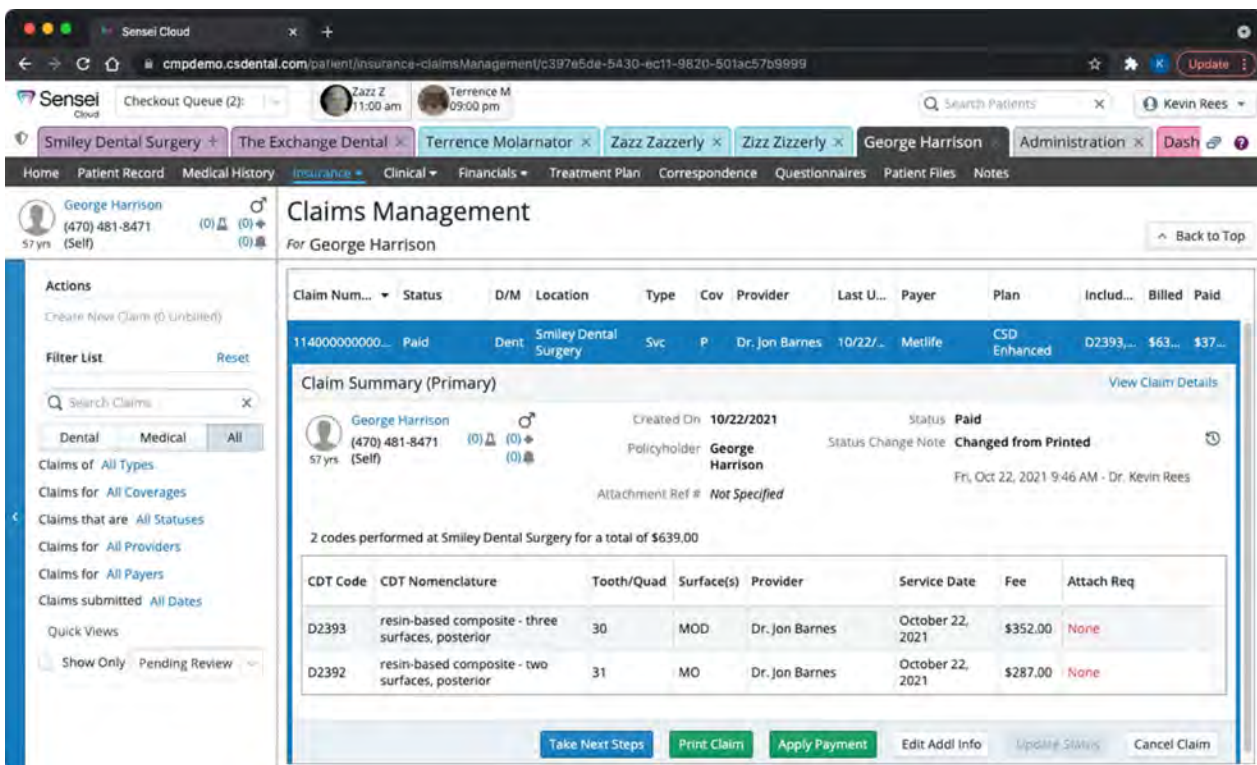
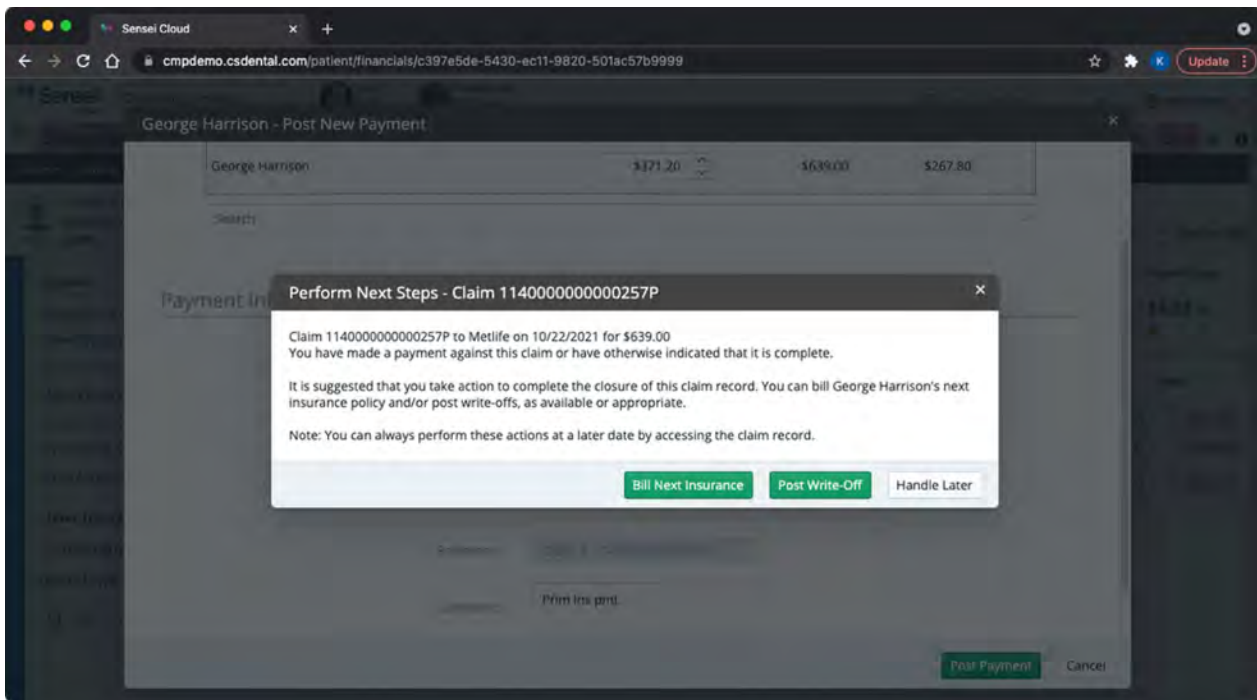
CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D2393	resin-based composite - three surfaces, posterior	30	MOD	Dr. Jon Barnes	October 22, 2021	\$352.00	None
D2392	resin-based composite - two surfaces, posterior	31	MO	Dr. Jon Barnes	October 22, 2021	\$287.00	None

Take Next Steps Print Claim Apply Payment Edit Addl Info [icon] Cancel Claim



NEW - Generating a Secondary (or Subsequent) Claim

Once the initial claim has reached a 'terminal' state - via the posting of an insurance payment against it or manual assignment of a 'terminal' status - Sensei Cloud now prompts you to 'take next steps' to continue or finalize the billing of the associated services. If the patient has additional policies that provide coverage, click 'Bill Next Insurance'. If no additional coverage applies (e.g., no additional policies) or is not necessary (e.g., anticipated remittance received), click 'Post Write-Off' to resolve any uncovered portion of the office fees. If you are currently unsure or not ready to proceed, click 'Handle Later' to defer any additional action to a later time. NOTE: You can access the 'Perform Next Steps' dialog by navigating to the patient's claim list, clicking on the associated claim (to display the 'Claim Summary'), and then clicking 'Take Next Steps' [Patient Tab > Insurance > Claims Management].



Clicking 'Bill Next Insurance' begins the creation of a secondary (or subsequent) claim record. A summary of the primary (or preceding) claim is provided, along with a list of the previously billed services. At this time, you can deselect any procedures that you don't want to include in the next claim submission. Finally, specify the policy to use for the secondary (or subsequent) claim and click 'Create Claim' to generate the new claim record. NOTE: As with initial claim generation, the ability to include specific service line items may be impacted by your selection of the policy that is to be billed for

each subsequent claim (e.g., checkboxes may become unchecked and disabled). The selected policy must provide coverage for the types of services being billed, must not have been already billed for the services, and must have been active at the time of the Service Date. NOTE: Carestream Dental's recommendation is that you wait for the payer response to the primary (or preceding) claim before proceeding with the generation of a secondary (or subsequent) claim.

The screenshot shows the 'Bill Next Insurance' dialog box in the Sensei Cloud application. The dialog box contains the following information:

This screen is used to bill completed work to George Harrison's next insurance policy. Select from the list of procedures (previously billed to Metlife) to include on the claim to Delta Dental of MN for the selected procedures.

Note: Remember that EOB or remittance advice from the previous claims must be included with the submission of this subsequent claim. Procedures previously billed to Metlife for Dr. Jon Barnes at Smiley Dental Surgery on 10/22/2021 for \$639.00.

2 of 2 previously billed procedure(s) selected

<input checked="" type="checkbox"/>	Svc Date	Code	Description	Tooth/Quad	Surface(s)	Amount
<input checked="" type="checkbox"/>	10/22/2021	D2393	resin-based composite - three surfaces, posterior		MOD	\$352.00
<input checked="" type="checkbox"/>	10/22/2021	D2392	resin-based composite - two surfaces, posterior		MO	\$287.00

Insurance to Bill: Delta Dental of MN - St. Anthony's Catholic Church (Dental)

An insurance claim to Delta Dental of MN will be created for \$639.00 (2 selected procedures)

Buttons: Create Claim, Cancel

An insurance claim to Delta Dental of MN for \$639.00 has been created. This claim may require some attachments for submission [View Claim](#)

The secondary (or subsequent) claim record is added to the patient's claim list [Patient Tab > Insurance > Claims Management]. The claim record is automatically populated with the 'primary' policy information as the 'Other Insurance' (e.g., Item 11) and any previous amount(s) paid (by insurance) towards the billed services in the 'Remarks' (e.g., Item 35). By default, the secondary claim is held prior to submission, providing you with an opportunity to review the claim information and provide any necessary supporting documentation (e.g., EOBs). Refer to the next section of these release notes for more information on attaching EOB(s) from the preceding claim (or claims).

Sensei Cloud Checkout Queue (2): Zazz Z 11:00 am Terrence M 09:00 pm Search Patients Kevin Rees

Smiley Dental Surgery | The Exchange Dental | Terrence Molarnator | Zazz Zazzerly | Zizz Zizzerly | George Harrison | Administration | Dash

Home Patient Record Medical History Insurance Clinical Financials Treatment Plan Correspondence Questionnaires Patient Files Notes

George Harrison (470) 481-8471 (Self) 57 yrs

Claims Management

For George Harrison

Actions: Create New Claim (0 Unbilled)

Filter List: Dental Medical All

Search Claims

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Awaiting Attachments		Smiley Dental Surgery	Svc	S	Dr. Jon Barnes	10/22/...	Delta Dental of MN	St. Anthony's Catholic Church	D2393...	\$63...	\$0.00
114000000000...	Paid		Smiley Dental Surgery	Svc	P	Dr. Jon Barnes	10/22/...	Metlife	CSD Enhanced	D2393...	\$63...	\$37...

George Harrison - Claim 114000000000258P (2021-10-22).pdf

1 / 1 125%

OTHER COVERAGE (Mark applicable box and complete items 5-11, if none, leave blank.)

4. Dental? Medical? (If both, complete 5-11 for dental only.)

5. Name of Policyholder/Subscriber in #4 (Last, First, Middle Initial, Suffix)
Harrison, George

6. Date of Birth (MM/DD/YYYY) 08/07/1964 7. Gender M F U

8. Policyholder/Subscriber ID (Assigned by Plan) 3591681

9. Plan/Group Number 555111000 10. Patient's Relationship to Person named in #5 Self Spouse Dependent Other

11. Other Insurance Company/Dental Benefit Plan Name, Address, City, State, Zip Code
MetLife / CSD Enhanced
P.O. Box 4567
El Paso, TX 79998

16. Plan/Group Number 71333337 17. Employer Name St. Anthony's Catholic Church

PATIENT INFORMATION

18. Relationship to Policyholder/Subscriber in #12 Above Self Spouse Dependent Child Other

19. Reserved For Future Use

20. Name (Last, First, Middle Initial, Suffix), Address, City, State, Zip Code
Harrison, George
1811 Huburn Dr.
Arlington, GA 39813

21. Date of Birth (MM/DD/YYYY) 08/07/1964 22. Gender M F U 23. Patient ID/Account # (Assigned by Dental)

RECORD OF SERVICES PROVIDED

24. Procedure Date (MM/DD/YYYY)	25. Area of One Tooth	26. Tooth System	27. Tooth Number(s) or Letter(s)	28. Tooth Surface	29. Procedure Code	29a. Diag. Frontier	29b. Qty	30. Description	31. Fee
10/22/2021	JP	30	MOD	D2393		01		resin-based composite - three su...	\$352.00
10/22/2021	JP	31	MO	D2392		01		resin-based composite - two surf...	\$287.00

33. Missing Teeth Information: (Place an "X" on each missing tooth.)

34. Diagnosis Code List Qualifier (ICD-10 = AB)

34a. Diagnosis Code(s) A: B: C: D:

34b. (Primary diagnosis in "A")

31a. Other Fee(s)

32. Total Fee \$639.00

35. Remarks
Paid by other ins: \$371.20

AUTHORIZATIONS

36. I have been informed of the treatment plan and associated fees. I agree to be responsible for all

ANCILLARY CLAIM/TREATMENT INFORMATION

38. Place of Treatment (1-11; in-p: 11-office; 22-OP Hospital) 39. Enclosures (Y or N)

cmpdemo.csdental.com/patient/insurance-claimsManagement/c397a5de-5430-ec11-9820-501ac57b9899

George Harrison (470) 481-8471 (Self) 57 yrs

Claims Management

For George Harrison

Actions: Create New Claim (0 Unbilled)

Filter List: Dental Medical All

Search Claims

Claims of All Types

Claims for All Coverages

Claims that are All Statuses

Claims for All Providers

Claims for All Payers

Claims submitted All Dates

Quick Views: Show Only Pending Review

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Awaiting Attachments		Smiley Dental Surgery	Svc	S	Dr. Jon Barnes	10/22/...	Delta Dental of MN	St. Anthony's Catholic Church	D2393...	\$63...	\$0.00

Claim Summary (Secondary) Go to Previous Claim View Claim Details

All secondary / subsequent claims should include copies of the EOB from any prior claim(s)

George Harrison (470) 481-8471 (Self) 57 yrs Created On 10/22/2021 Status Awaiting Attachments

Policyholder George Harrison Status Change Note

Attachment Ref # Add Attachments

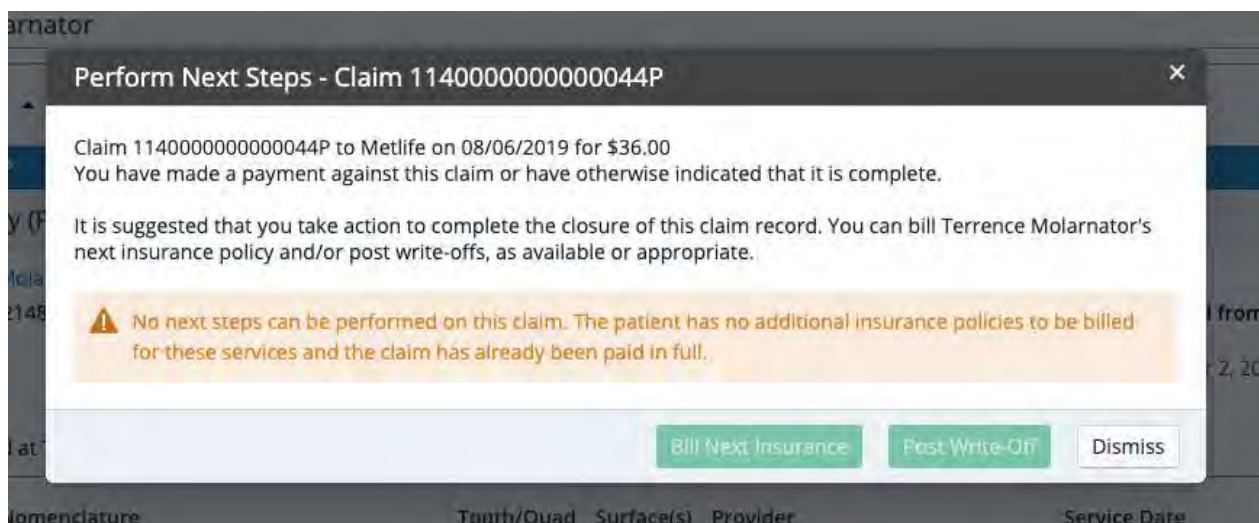
2 codes performed at Smiley Dental Surgery for a total of \$639.00

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D2393	resin-based composite - three surfaces, posterior	30	MOD	Dr. Jon Barnes	October 22, 2021	\$352.00	EOB
D2392	resin-based composite - two surfaces, posterior	31	MO	Dr. Jon Barnes	October 22, 2021	\$287.00	EOB

Take Next Step Skip Attach Submit Claim Print Claim Request Payment Edit Add Info Update Status Cancel Claim

IMPORTANT: If your practice regularly submits secondary (or subsequent) claims, then it is suggested that you set your 'New Claim Handling' rule to 'Hold For Review' [Administration Tab > Practice Settings > Claim Rules]. This ensures that all claims are prevented from being automatically queued before you have a chance to review the (secondary or subsequent) claim, as you may need to print and manually send the claim to the payer and include a copy of the EOB. This prevents your secondary (or subsequent) claims from getting unnecessarily rejected in case the payer does not accept electronic attachments or if your practice does not utilize the NEA *FastAttach* service.

Once submitted to the clearinghouse, repeat the process of getting the secondary (or subsequent) claim to a 'terminal' state. Once 'paid' (via the posting of an insurance payment) or manually assigned another 'terminal' status (e.g., 'Closed', 'Completed', 'Denied', or 'Rejected'), you are again prompted to 'perform next steps'. You can continue to bill each available, remaining insurance policy or post a write-off, as appropriate. NOTE: The 'next steps' actions available to you vary with the contextual conditions of the patient coverage and the existing claim's status. 'Bill Next Insurance' is only available when the patient has an applicable insurance policy that has not yet been billed for the associated services (and was active at the time of the Service Date). Additionally, if the billed services have been already paid in full by insurance, then the options to 'Bill Next Insurance' or 'Post Write-Off' are unavailable (as the billed services have already been completely covered).



When the patient has no remaining coverage to bill and/or all of the expected reimbursement has been received, click 'Post Write-Off' to resolve the remaining portion of the unpaid balance from the billed services. This opens

the 'Adjust Balance' dialog and automatically selects the 'Write-Off' adjustment type. The claim's associated provider and location are assigned by default. The 'Contracted Insurance' write-off type has also been defaulted, although you can change this to any active write-off type. Additionally, a comment with associated claim details has been added for contextual reference, which includes the claim number, payer, date of service, and the billed services (e.g., procedures). Specify the amount of the write-off and click 'Save Changes' to post the write-off to the patient ledger. NOTE: Carestream Dental's recommendation is that you wait to post a write-off until all of the submitted claims have been adjudicated, so that the lowest acceptable write-off can be posted.

The screenshot shows the Sensei Cloud interface for Claims Management. A modal dialog is open with the following text:

Perform Next Steps - Claim 114000000000259P

Claim 114000000000259P to Delta Dental of MN on 10/22/2021 for \$639.00
You have made a payment against this claim or have otherwise indicated that it is complete.

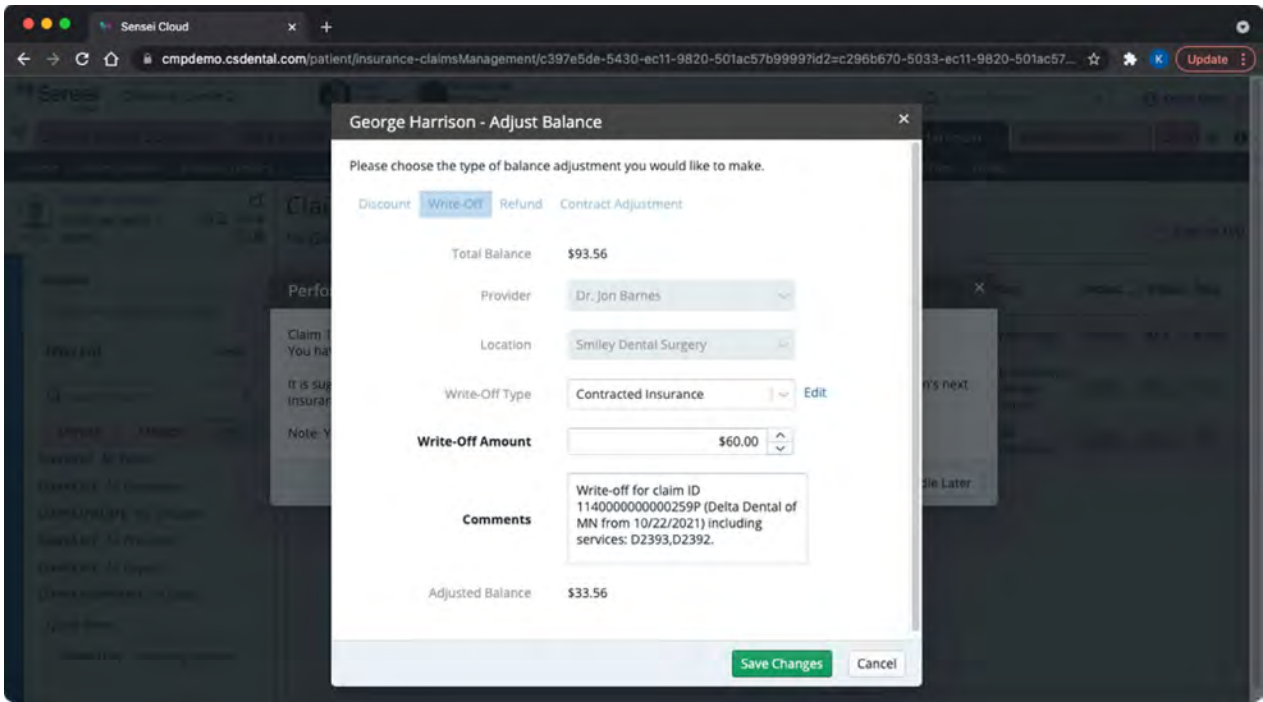
It is suggested that you take action to complete the closure of this claim record. You can bill George Harrison's next insurance policy and/or post write-offs, as available or appropriate.

Note: You can always perform these actions at a later date by accessing the claim record.

Buttons: **Bill Next Insurance**, **Post Write-Off**, **Handle Later**

The background interface shows a patient record for George Harrison (470) 481-8471, 37 yrs (Self). The 'Claims Management' section is active, showing a list of claims with columns for Plan, Includ..., Billed, and Paid. A table of claims is partially visible:

Plan	Includ...	Billed	Paid
Wells Fargo	D2393...	\$63...	\$0.00
St. Anthony's Catholic Church	D2393...	\$63...	\$17...
NO Authorized	D2393...	\$63...	\$37...



[0.1.6971 RELEASE UPDATES CONTINUED ON PART 2]

 Add tags



Reply

Sort: Newest to Oldest

All forum topics < Previous Topic Next Topic >



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Post Reply

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Khoros 

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Atlanta, GA 30339

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