MOD kevin_moloney
Moderator

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Sensei Cloud Release 0.1.6971 (Part 2)

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.

[0.1.6971 RELEASE UPDATES CONTINUED FROM PART 1]

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

Lastly, the claims worklist screen(s) has been enhanced to help you manage 'claim chains' (e.g., series of related claims for a set of billed services) [Patient Tab > Insurance > Claims Management OR Location Tab > Claims > Claims Management]. A new 'Cov'(erage) column is available that indicates the claim order / priority, with 'P' for the primary / first claim, 'S' for the secondary / second claim, and 'O' for any subsequent claim. A corresponding filter has also been added to the side panel to help you isolate claims of a certain coverage level. NOTE: Pre-authorization, orthodontic contract, and COT claims are not assigned a coverage type. There are also 'Go To Next Claim' and 'Go To Previous Claim' navigational controls in the Claim Summary (as applicable) to quickly navigate to the preceding or succeeding (related) claim record in the 'claim chain'. NOTE: These controls are also in the Claim Details dialog and automatically open the details of the associated claim record.

We hope these enhancements better support your insurance billing needs, including the expanded claiming requirements for patients with multiple sources of coverage. We look forward to your feedback on what works well and what additional enhancements can be made to support your claim management workflows.

[US Only] EOB Claim Attachments for Secondary / Subsequent Claims

This week's release also extends the existing NEA *Fast*Attach-based electronic claims attachment functionality, accommodating the ability to attach primary (preceding) claim EOBs as supporting evidence on a secondary (subsequent) claim. While there is now a new 'EOB' attachment type, the existing workflow for adding electronic attachments to your claims in Sensei Cloud remains unchanged. NOTE: Please refer to the Release Notes for build 3687 (from April 12, 2019) for a discussion of Sensei Cloud's integration with the NEA *Fast*Attach service and a detailed description of the workflow for submitting electronic claim attachments.

NOTE: For effective handling of secondary (or subsequent) claims, it is suggested that you update your 'New Claim Handling' rule to 'Hold For Review' (instead of 'Auto Transmit') [Administration Tab > Practice Settings > Claim Rules]. This ensures that all claims are held in a 'pending review' state and prevents queueing (and automatic transmission) when the payer does not accept electronic attachments. In these cases, it is suggested that you print a copy of the claim and manually submit it to the payer, along with a copy of any necessary EOB(s) and supporting documentation.

If your practice subscribes to the NEA *Fast*Attach service and has been configured for integration, then you are already able to add electronic attachments to your claims prior to submission to the clearinghouse. Secondary (or subsequent) claims are automatically flagged as requiring EOBs upon creation. You are reminded of this general requirement when requesting reimbursement from a secondary payer in the 'Bill Next Insurance' dialog when creating the secondary (or subsequent) claim [Patient Tab > Insurance > Claims Management > {Select Claim} > {Take Next Steps} > {Bill Next Insurance}]. Once generated, the Claim Summary of the secondary (or subsequent) claim record also clearly indicates this 'EOB' attachment requirement [Patient Tab > Insurance > Claims Management > {Select Claim}].

Click 'Add Attachments' in the Claim Summary screen to add electronic attachments to the claim record. Use the existing 'Image', 'Narrative', or 'Perio Exam' controls to add any necessary supporting documentation for the billed services, based on the payer rules (and indicated in the service line details of the Claim Summary). To add an EOB or remittance advice received from the primary (or preceding) claim select the 'EOB' attachment type. Image-based files that have been previously uploaded to Patient Files [Patient Tab > Patient Files] are displayed and available for selection (in the case that you have already scanned and/or uploaded the EOB). Check the applicable file(s) for submission and then 'Save' to associate the files with the claim record.
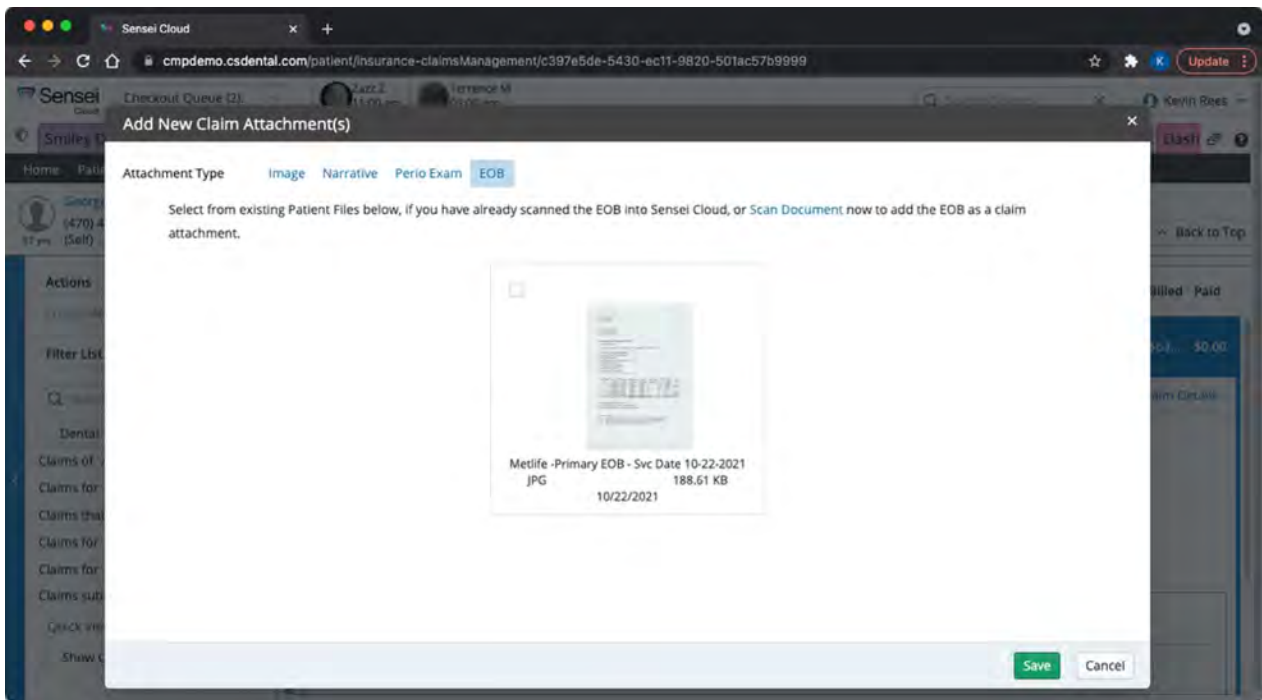
Alternatively, if you have not already scanned and uploaded the EOB to Patient Files, then click the 'Scan Document' hyperlink to utilize your TWAIN-based optical scanner to add your EOB to the claim record. Once scanned and saved in the 'Scan Document' dialog, it is selected for submission with the claim and is also added to the patient's Patient Files repository. Click 'Save' to associate the file(s) with the claim record. NOTE: Direct document scanning requires the installation of the Sensei Cloud imaging bridge. Please refer to the Release Notes for build 5623 (from January 13, 2021) for details on how to configure Sensei Cloud for document scanning and the workflow for scanning documents into Patient Files.

Add New Claim Attachment(s)   ✕

Attachment Type   Image   Narrative   Perio Exam   **EOB**

Select from existing Patient Files below, if you have already scanned the EOB into Sensei Cloud, or Scan Document now to add the EOB as a claim attachment.

☑

George Harrison - EOB - Svc Date 10-21-2021
JPG   187.60 KB
10/22/2021

☐

Metlife -Primary EOB - Svc Date 10-22-2021
JPG   188.61 KB
10/22/2021

Save   Cancel
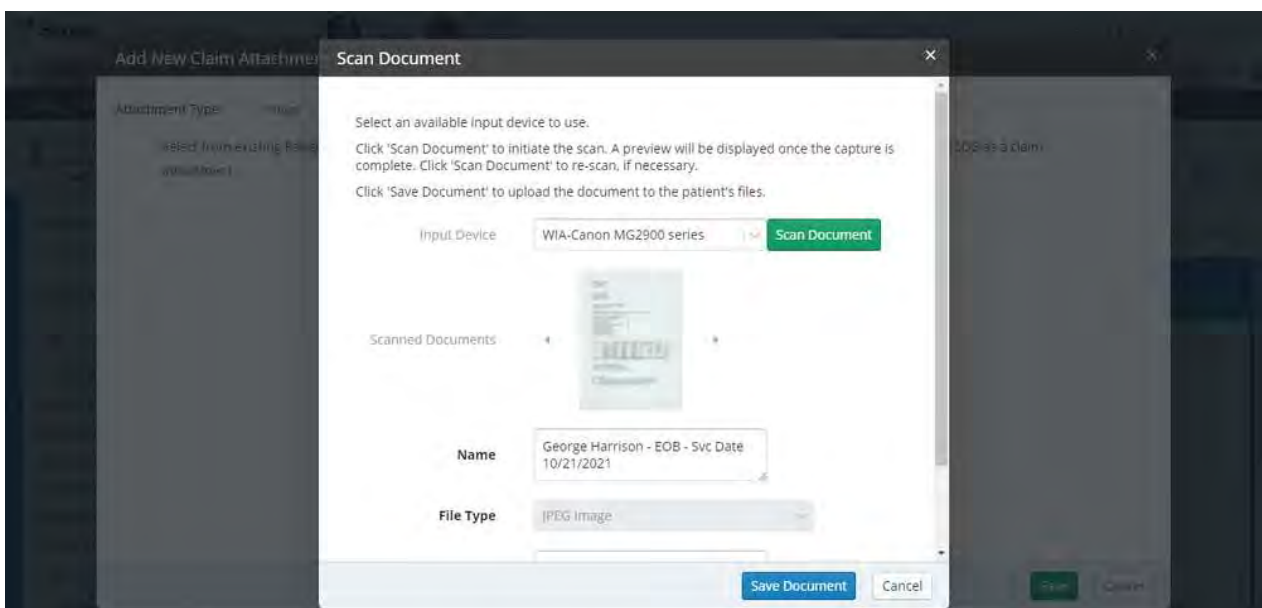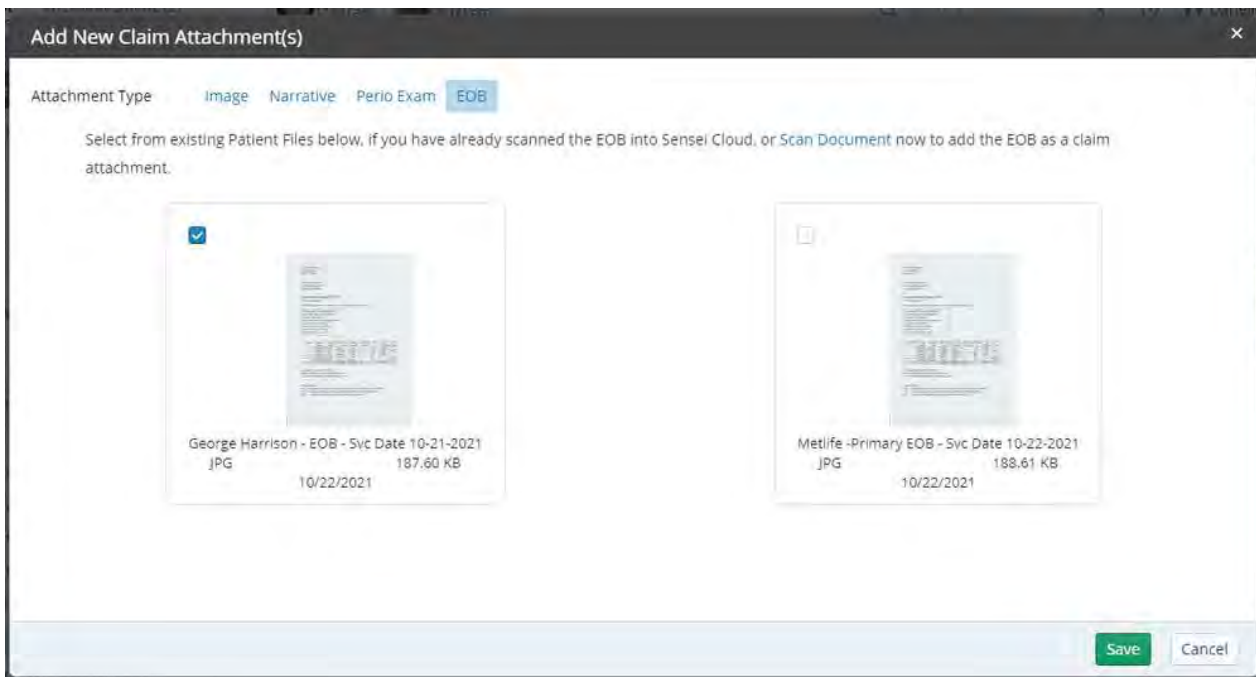
Finally, click 'Submit Claim' in the Claim Summary screen to transmit the added electronic attachments to NEA *Fast*Attach. REMEMBER: You need to log into NEA *Fast*Attach and confirm the claim / attachments to finalize the process. This adds the Attachment Reference Number to the claim record in Sensei Cloud and queues it for submission to the clearinghouse.
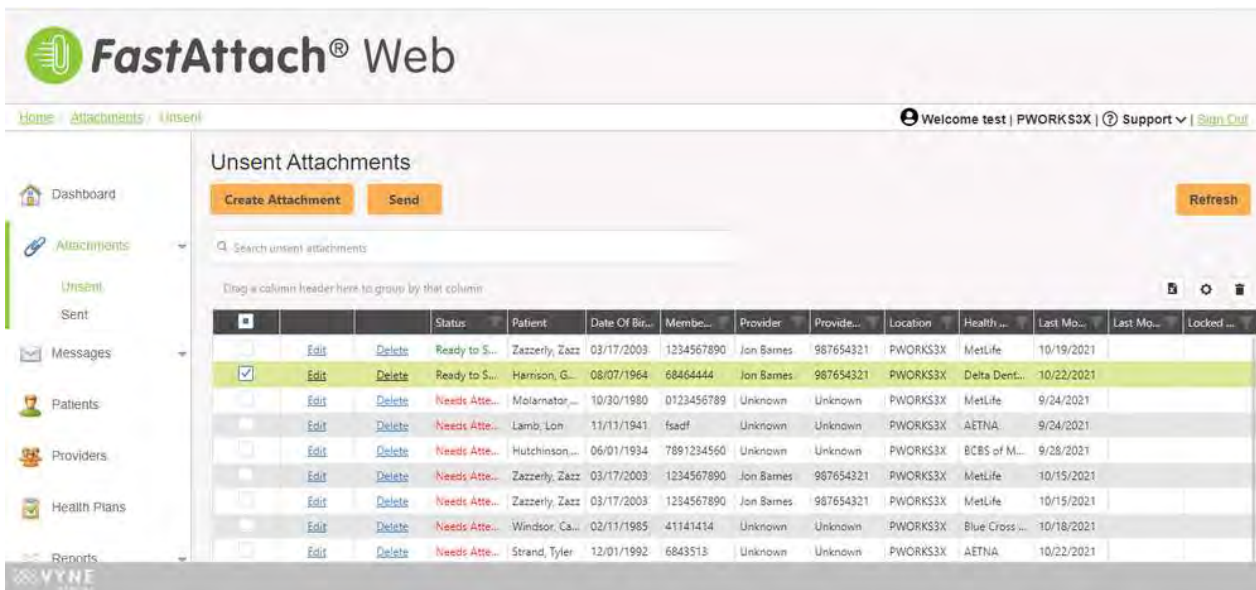
In order to improve the efficiency of the electronic claim attachment process for a series of related claims (e.g., secondary and/or subsequent claims), Sensei Cloud automatically inherits any attachments from the primary (or preceding) claim. More specifically, any electronic claim attachments that were added through Sensei Cloud and were included with the previous (preceding) claim submission will be automatically added to the next

(succeeding) claim record. Simply attach any new EOB(s) or unique payer requirements and submit the claim. NOTE: You still need to confirm the claim / attachments in NEA *Fast*Attach in order to release the claim to the clearinghouse. EXCEPTION: Any items attached to the claim directly through NEA *Fast*Attach, instead of the adding through Sensei Cloud and transmitting to NEA, will not be inherited by the next related claim. Additionally, if a payer within the 'claim chain' does not accept electronic attachments, then you will need to manually add any previous attachments to a successive claim (e.g., attachments submitted with the primary claim, secondary claim's payer did not accept electronic attachments, so any previous attachments need to be manually added to the tertiary claim). As previously discussed, if the payer for a secondary (or subsequent) claim does not accept electronic attachments, then it is recommended that you print a copy of the claim and manually submit it to the payer, along with a copy of any necessary EOB(s) and supporting documentation.

We hope these further enhancements to claim management ensure the successful handling of secondary (subsequent) claims. Please let us know what works well and what additional improvements are needed in support of your multiple payer billing needs.

Optimizations and Fixes

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

1. Addressed an issue that would allow for the definition of excessive patient Chief Concerns on a given date / appointment via the Ortho Clinical Summary.
2. Resolved some interaction issues that occurred when resizing the block of reserved time slots for an appointment in the Schedule DayView.
3. Fixed a defect which would sometimes prevent the saving of updates to a Block Booking template.
4. Addressed a bug that generated errors when viewing or editing a Block Booking template.
5. Fixed an issue with the Payment Type field when posting a new payment that prevented the user from searching against and selecting a payment type.

6. Resolved a defect in which the creation of a Yes/No question (in the Question Library) would generate errors when it included an 'unspecified' option.
7. Fixed a bug in the Hard Tissue Chart in which the supernumerary tooth would not be displayed upon selection in specific anatomical contexts.
8. Addressed an issue in which the Team Timecards menu option was sometimes missing from the Administration Tab.
9. Resolved a defect in which the saving or activation of an orthodontic contract would sometimes fail due to a conflict with the NEA FastAttach service integration.
10. Fixed an issue that would prevent the successful activation of a contract when a CDT code (selected for billing) is not associated with an active procedure.
11. Addressed a bug in which errors would sometimes be generated when trying to edit an orthodontic contract.
12. Resolved an issue in which the generation of bulk electronic statements was failing.

✎ Add tags

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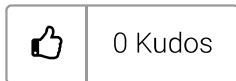
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