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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.

Claims Management
For George Harrison

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Completed	Dent	Smiley Dental Surgery	Svc	O	Dr. Jon Barnes	10/22/...	Delta Dental of MN	Wells Fargo	D2393,...	\$63...	\$0.00
114000000000...	Paid	Dent	Smiley Dental Surgery	Svc	S	Dr. Jon Barnes	10/22/...	Delta Dental of MN	St. Anthony's Catholic Church	D2393,...	\$63...	\$17...
114000000000...	Paid	Dent	Smiley Dental Surgery	Svc	P	Dr. Jon Barnes	10/22/...	Metlife	CSD Enhanced	D2393,...	\$63...	\$37...

Sensei Cloud

cmpdemo.csdenal.com/patient/insurance-claimsManagement/c397e5de-5430-ec11-9820-501ac57b9999

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

Claims Management

For George Harrison

Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
11400000000...	Paid		Smiley Dental Surgery	Svc	S	Dr. Jon Barnes	10/22/...	Delta Dental of MN	St. Anthony's Catholic Church	D2393...	\$63...	\$17...

Claim Summary (Secondary)

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

Created On: 10/22/2021
 Status: Paid
 Status Change Note: Changed from Printed
 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

Buttons: Take Next Steps, Print Claim, Apply Payment, Edit Addl Info, Update Status, Cancel Claim

Sensei Cloud

cmpdemo.csdenal.com/patient/insurance-claimsManagement/c397e5de-5430-ec11-9820-501ac57b9999

Claim Details (Secondary)

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

Summary

Created On: 10/22/2021
 Pre-Authorization #: Not Specified
 Attachment Ref #: Not Specified
 Status: Paid
 Status Change Note: Changed from Printed
 Fri, Oct 22, 2021 12:00 PM - Dr. Kevin Rees

Billed Codes

2 codes for a total of \$639.00

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

Buttons: Print Claim, Update Status, Close

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 *FastAttach*-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 *FastAttach* 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.

The screenshot displays the 'Claim Rules' configuration page in Sensei Cloud. A modal dialog is open, titled '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.' The dialog features two radio buttons: 'Auto Transmit' and 'Hold For Review', with 'Hold For Review' selected. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows the Sensei Cloud interface with a navigation menu and a 'Claim Rules' section for 'All Locations'.

If your practice subscribes to the NEA *FastAttach* 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}].

The screenshot displays the 'Bill Next Insurance' dialog box within the Sensei Cloud application. The dialog provides instructions for billing completed work to a patient's next insurance policy. It includes a table of selected procedures and a dropdown menu for the insurance to bill.

Bill Next Insurance

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)

[Create Claim](#) [Cancel](#)

The screenshot displays the 'Claims Management' page for George Harrison. The main content area shows a table of claims with the following data:

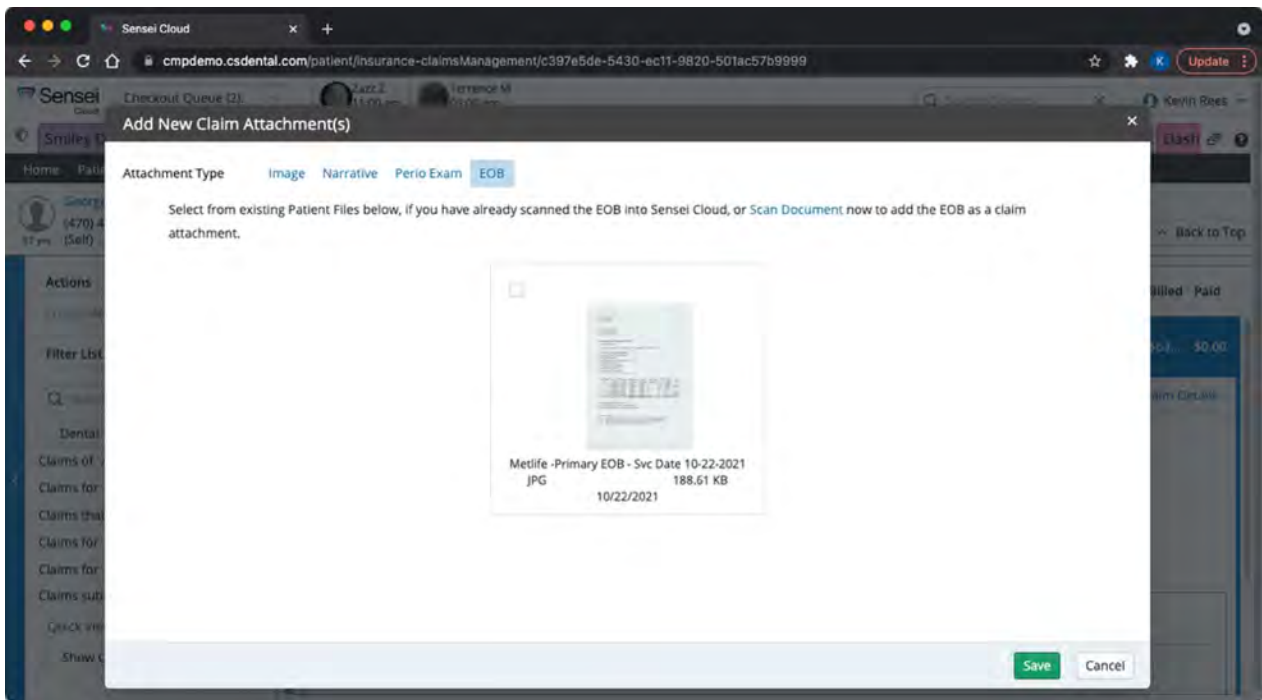
Claim Num...	Status	D/M	Location	Type	Cov	Provider	Last U...	Payer	Plan	Includ...	Billed	Paid
11400000000...	Awaiting Attachments		Smiley Dental Surgery	Svc	S	Dr. Jon Barnes	10/22/...	Delta Dental of MN	St. Anthony's Catholic Church	D2393...	\$63...	\$0.00

Below the table is the 'Claim Summary (Secondary)' for claim 11400000000... The summary includes a warning: 'All secondary / subsequent claims should include copies of the EOB from any prior claim(s)'. The patient information is George Harrison (470) 481-8471 (Self), 57 yrs, created on 10/22/2021, with status 'Awaiting Attachments'. The summary notes '2 codes performed at Smiley Dental Surgery for a total of \$639.00'.

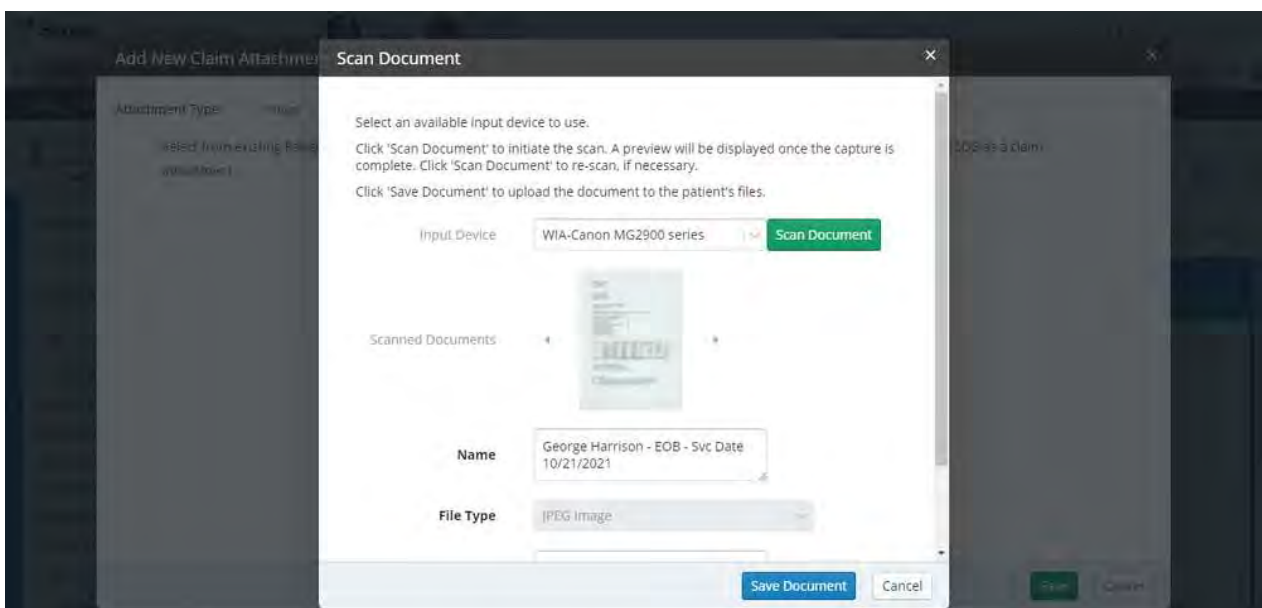
CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D2393	resin-based composite - three surfaces, posterior	30	MOD	Dr. Jon Barnes	October 22, 2021	\$352.00	EOB
D2392	resin-based composite - two surfaces, posterior	31	MO	Dr. Jon Barnes	October 22, 2021	\$287.00	EOB

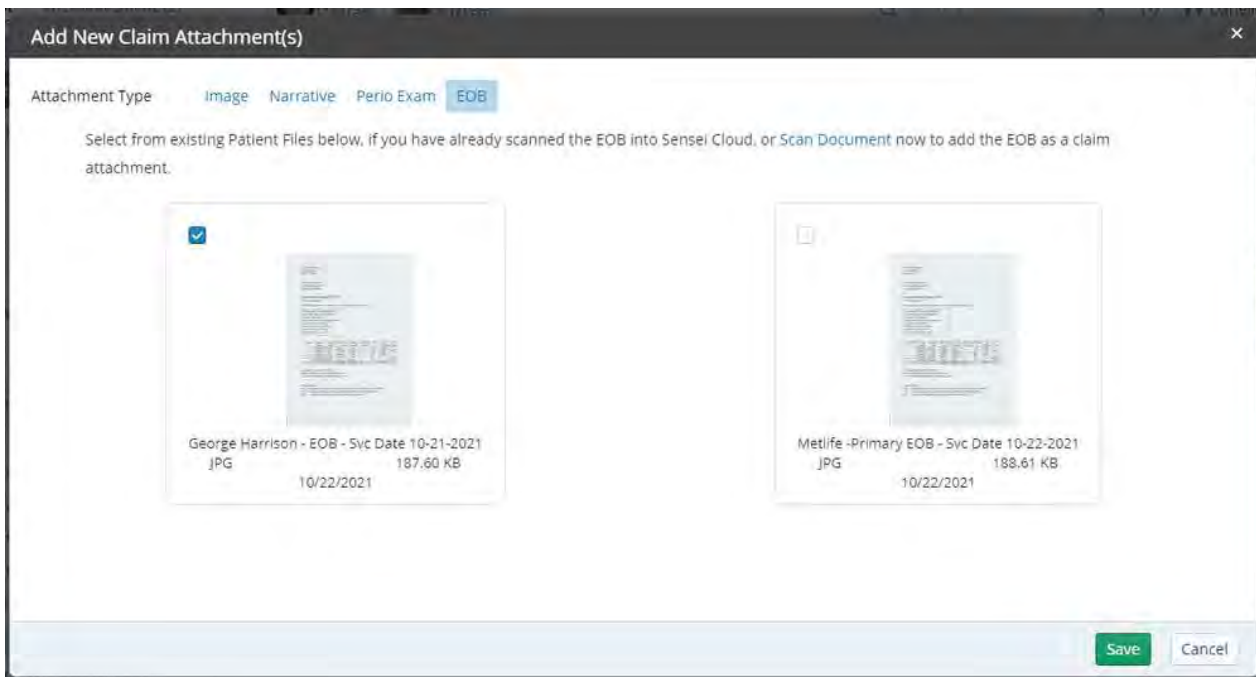
At the bottom of the claim summary, there are buttons for 'Add Attachments', 'Skip Attach', 'Submit Claim', 'Print Claim', 'Ready Payment', 'Edit Addl Info', 'Update Status', and 'Cancel Claim'.

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.

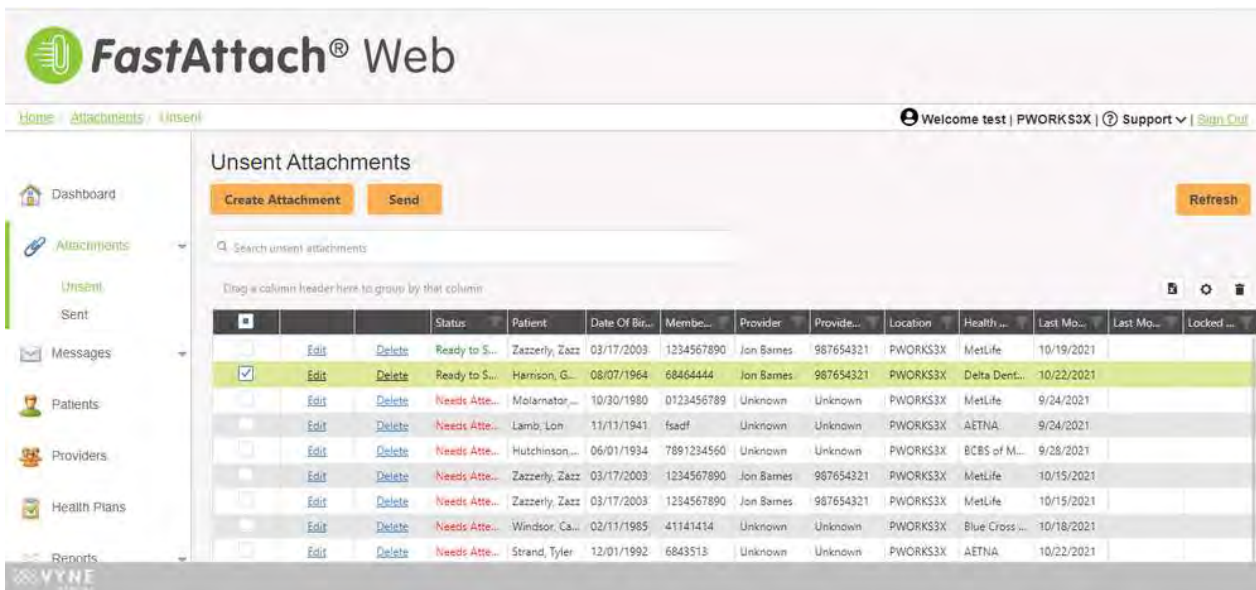


Alternatively, if you have not already scanned and uploaded the EOB to Patient Files, then click the 'Scan Document' hyperlink to utilize your TWAIN-based optical scanner to add your EOB to the claim record. Once scanned and saved in the 'Scan Document' dialog, it is selected for submission with the 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.





Finally, click 'Submit Claim' in the Claim Summary screen to transmit the added electronic attachments to NEA *FastAttach*. REMEMBER: You need to log into NEA *FastAttach* 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 *FastAttach* in order to release the claim to the clearinghouse. EXCEPTION: Any items attached to the claim directly through NEA *FastAttach*, 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.

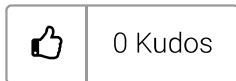
Optimizations and Fixes

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.

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