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Sensei Cloud Release 0.1.7160

# Sensei Cloud

Weekly Release

Build 0.1.7160 | November 16th, 2021

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

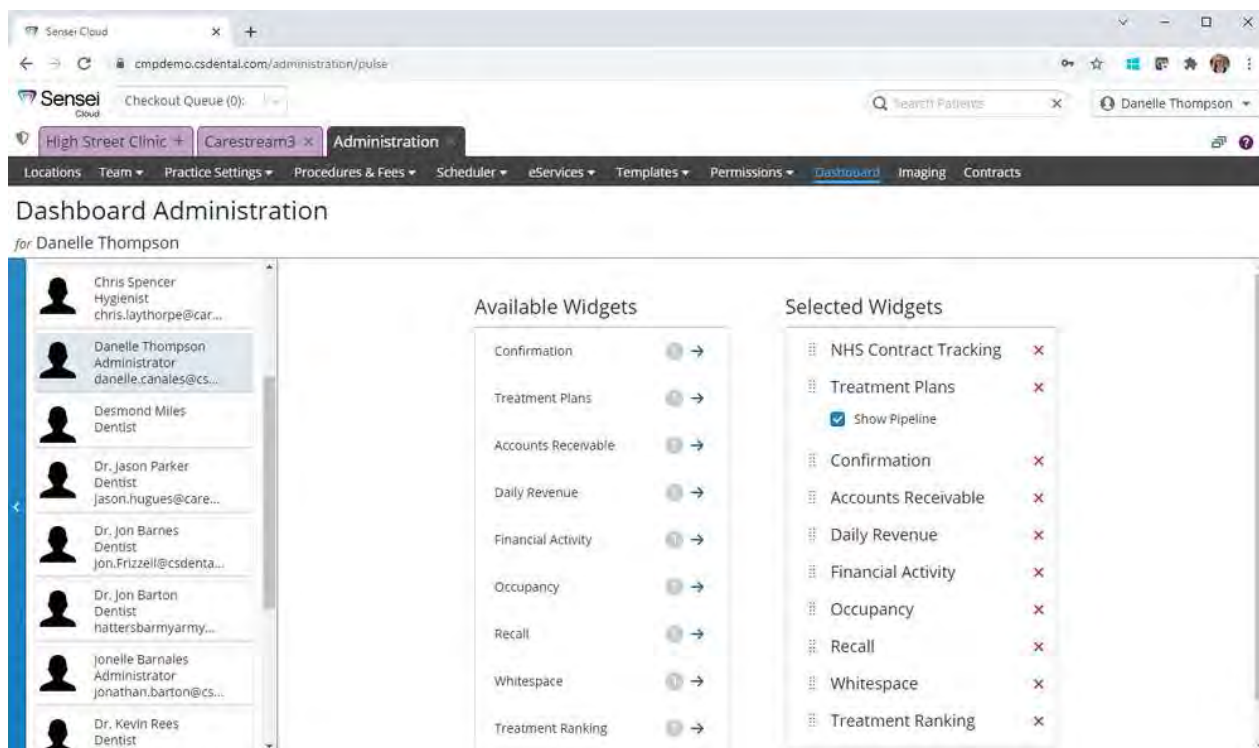
## [UK Only] NHS Contract Tracking (Widget)

In response to customer feedback, this week's release includes the implementation of a new Springboard widget that tracks progress towards an NHS contract's UDA target. This provides NHS practices with a simple, visual overview of a contract's current status, along with a categorised breakdown of UDAs by NHS claim status. The new 'NHS Contract Tracking' widget makes it easier for you to ensure that you are meeting your contract targets, preventing any clawback of funds.

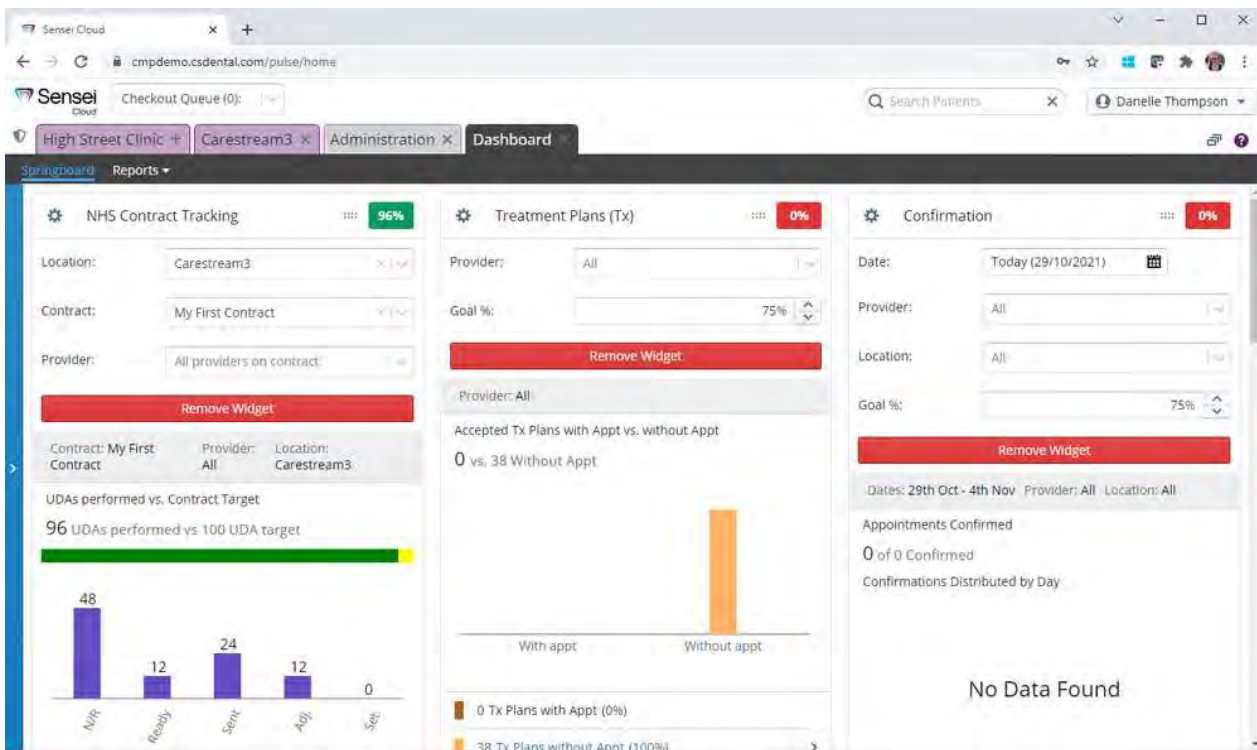
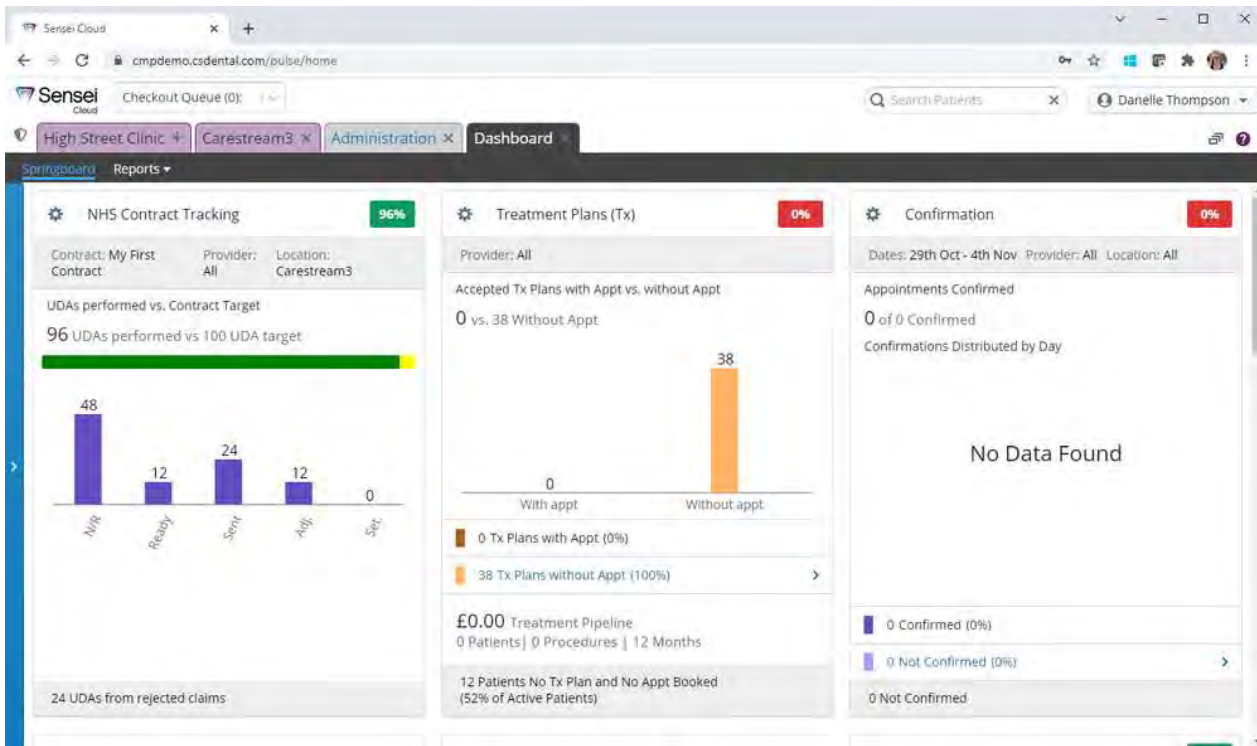
# Review of Springboard

The Springboard console presents an array of crafted widgets that provide useful KPIs (key performance indicators) on practice performance.

Springboard is readily accessible via the user menu [User Menu > Dashboard > Springboard] and can be customised to each user's needs. Practice administrators can determine which Springboard widgets should be displayed for each user, as well as the default layout and ordering of the widgets on the screen [Administration Tab > Dashboard]. NOTE: To prevent team member access to the Dashboard Tab (including Springboard), simply uncheck the 'Dashboard and Customized Reporting' option in User Permissions [Administration Tab > Permissions > User Permissions > {Select Team Member} > {Edit User Permissions}].



Following administration configuration, all team members with access to Springboard can further customise their individual views, reorganizing their available widgets and applying filters. Within Springboard, each widget can be customised using a set of contextually-relevant filters. Click on the 'cog' icon to display the widget's available controls and use the filters to view data by provider, location, or time period, as appropriate. Some widgets also support the definition of a goal that can be further used to indicate whether the overall practice (or filtered location and/or provider) is meeting a specified target for the performance metric. Click the 'cog' icon again to hide the controls.



## NEW – Utilising the NHS Contract Tracking Widget

As previously mentioned, Sensei Cloud now includes a new 'NHS Contract Tracking' widget. This widget can be applied to any team member's Springboard configuration via the Dashboard Administration screen [Administration Tab > Dashboard > {Select Team Member}]. As with all Springboard widgets, click on the arrow (in the 'Available Widgets' list) next to the 'NHS Contract Tracking' widget to add it to the user's 'Select Widgets' list.

NOTE: If the team member you are customising Springboard for is an NHS provider, an option to 'Show all NHS claims data' becomes available. Check this option if you want the team member (provider) to be able to view NHS contract data for themselves and any other providers (performers) on the contract. If you prefer that individual providers (performers) can only see their own UDA data, then leave this option unchecked. Additionally, providers are only able to view data for NHS contracts on which they are an associated performer. IMPORTANT: Non-providers (e.g., administrators) are able to see all contract and performer data by default. The same is true for any provider team members (whether NHS or not) that have access to the widget with this option unchecked. Simply do not add the widget to the Springboard for any team members that should not have access to NHS contract data.

### Dashboard Administration

for Dr. Jon Barton

Available Widgets	Selected Widgets
Confirmation	NHS Contract Tracking <input checked="" type="checkbox"/> Show all NHS claims data
Treatment Plans	Confirmation
Accounts Receivable	Treatment Plans <input checked="" type="checkbox"/> Show Pipeline
Daily Revenue	Accounts Receivable
Financial Activity	Daily Revenue
Occupancy	Financial Activity
Recall	Occupancy
Whitespace	Recall
Treatment Ranking	Whitespace
NHS Contract Tracking	Treatment Ranking

Click and drag (using the handle control) to change the order of the widgets when viewing Springboard. NOTE: Each widget can be added multiple times to the team member's Springboard view. This is useful if the user would like to track multiple providers individually or monitor different NHS contracts simultaneously, without having to continually update the widget's filters. The indicator in the 'Available Widgets' column updates to indicate how many instances of the widget have been added to the team member's view.

## Available Widgets

Confirmation	1 →
Treatment Plans	1 →
Accounts Receivable	1 →
Daily Revenue	1 →
Financial Activity	1 →
Occupancy	1 →
Recall	1 →
Whitespace	1 →
Treatment Ranking	1 →
NHS Contract Tracking	3 →

## Selected Widgets

⋮ NHS Contract Tracking	×
<input checked="" type="checkbox"/> Show all NHS claims data	
⋮ Confirmation	×
⋮ Treatment Plans	×
<input checked="" type="checkbox"/> Show Pipeline	
⋮ NHS Contract Tracking	×
⋮ NHS Contract Tracking	<input checked="" type="checkbox"/> Show all NHS claims data
<input checked="" type="checkbox"/> Show all NHS claims data	
⋮ Accounts Receivable	×
⋮ Daily Revenue	×
⋮ Financial Activity	×
⋮ Occupancy	×
⋮ Recall	×
⋮ Whitespace	×

Once team members have access to the 'NHS Contract Tracking' widget, they can further customise each instance via Springboard [Dashboard Tab > Springboard]. As previously discussed, click on the 'cog' to access the widget's available filters. You are able to filter the presented data to a specific NHS contract or a specific performer on an NHS contract. Changes to the widget's filters are applied immediately, updating the data display of performed UDAs (and associated targets) based on the selected context. The current filter settings are displayed below the widget's header bar after the filters are closed, so that the applied context remains readily visible.



# NHS Contract Tracking

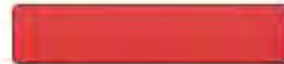


96%

Location: Carestream3

Contract: My First Contract

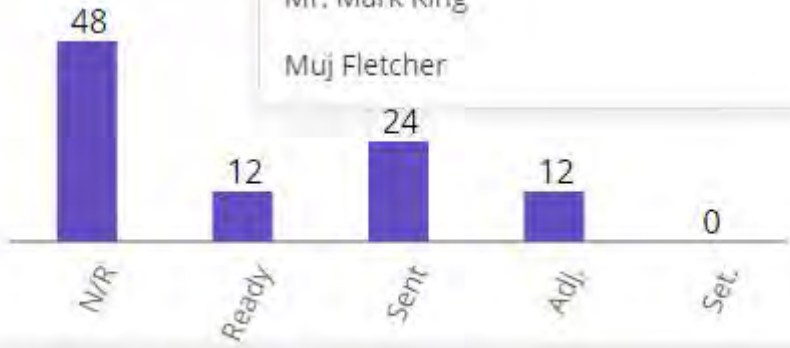
Provider: All providers on contract



- Chris Spencer
- Desmond Miles
- Dr. Jason Parker
- Dr. Jon Barnes
- Dr. Jon Barton
- Dr. Kevin Rees
- Mr. Mark King
- Muj Fletcher

Contract: My First Contract

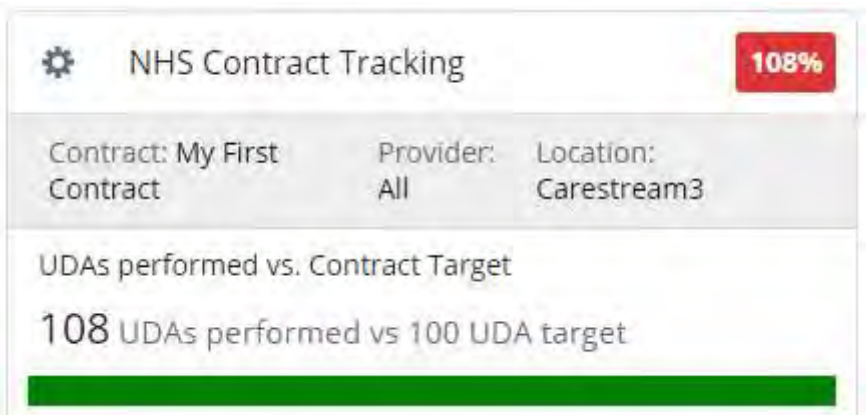
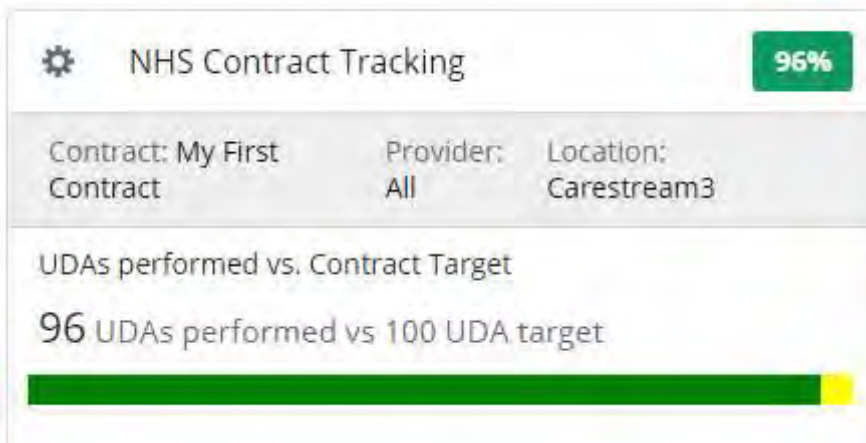
UDAs performed vs. 96 UDAs perform



24 UDAs from rejected claims



Key details of the widget are color-coded to increase its usability, making the status of the selected contract data view (e.g., contract and/or provider) readily apparent. The current percentage towards (UDA target) completion is displayed at the top of the widget. This indicator is displayed in red until the performed UDAs are within 5% of the contract's (or performer's) associated target. Once within 5% of the target (e.g., 95 - 105%), the indicator turns green. Additionally, a clear, numerical summary of the performed UDAs versus the target is provided, along with a progress bar. As UDAs are performed, the bar becomes progressively green, indicating that an increasing percentage of the target UDAs (in yellow) has been fulfilled.

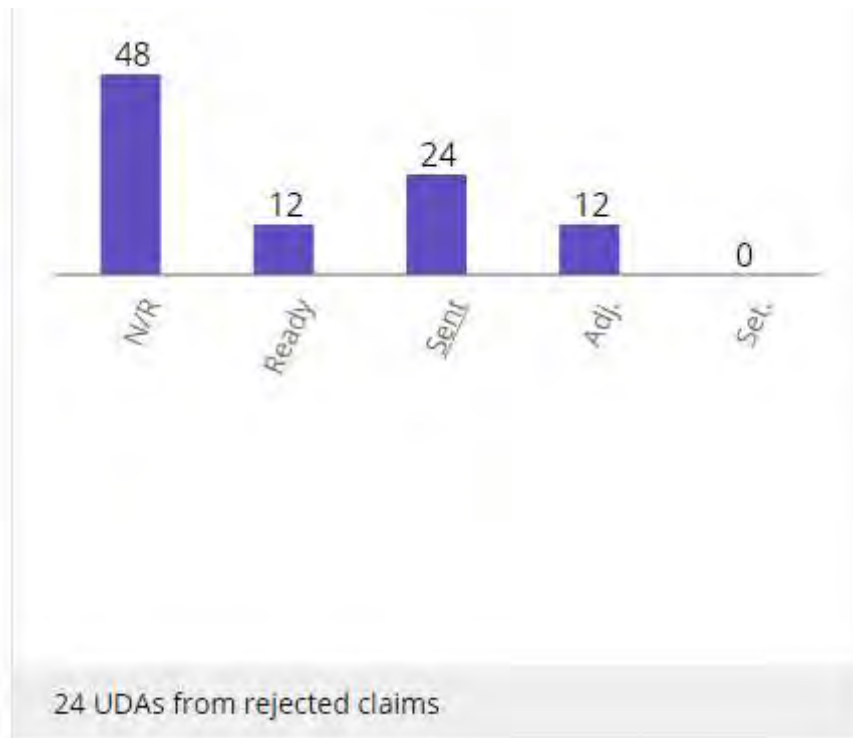


Below the progress bar, a summary of the performed UDAs is provided, broken down by NHS claim status. This includes all UDAs associated with NHS claims that are 'Not Ready' (N/R), 'Ready to Send' (Ready), 'Sent', 'Adjusted' (Adj.), and 'Settled' (Set.). Each of the bar graph's status titles is a hyperlink that navigates you to the 'Claims Management' screen [Location Tab > NHS Claims > Claims Management]. The widget's associated filters, including the contract, provider, and claim status, are automatically applied, making it easy to review and act on the associated NHS claims, as needed. In the case of the 'Settled' (Set.) hyperlink, you are redirected to the 'Recently Settled Claims' screen [Location Tab > NHS Claims > Recently Settled Claims]. Again, the widget's relevant



filters are automatically applied, making it easy to review the associated claims. NOTE: The footer of the widget includes any UDAs associated with rejected NHS claims, providing awareness of any work performed that is in dispute. These UDAs are not counted in the overall progress towards the contract's (or performer's) target. Once any rejected claims are corrected, resubmitted, and processed, these UDAs are then reflected in the status data.

Claim #	Status	Acceptance	Completion	Charge	UDA	Claiming Dentist	Patient Foren...	Patient Surna...		
000007	Sent	27/10/2021	27/10/2021	£0.00	12	Dr. Jon Barton	Ben	Brown	↻	✓
000008	Sent	27/10/2021	27/10/2021	£0.00	12	Dr. Jon Barton	Ben	Brown	↻	



We hope that this new Springboard widget provides support to our NHS customers, making it easier to track the progress of their active NHS contracts (and contract performers) towards the contract period's UDA target. We look forward to your feedback on what additional enhancements can be made to further improve your NHS claim tracking workflows.

## Optimizations and Fixes

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

1. Fixed a workflow issue with multi-dentition charting (e.g., mixed dentition or supernumerary teeth) in which users could inadvertently make an existing supernumerary tooth inaccessible when swapping a primary and permanent tooth (or vice versa).
2. Addressed a defect that would sometimes create errors when scanning in new EOB claim attachments.
3. Resolved a bug in which the 'Last Statement Date' was not being correctly updated for patient accounts when bulk statements are generated.
4. Fixed a UI issue with the generation of Billing Statements in which the RP name was not being included in the addressee information.
5. Addressed a defect in which the printing of an insurance claim would fail when certain patient data conditions existed.
6. Fixed a bug that could allow users to inadvertently produce multiple claim records when generating a secondary (or subsequent) claim.
7. Resolved an issue with billing statements for patients with orthodontic contracts to ensure that the 'Due Now' amount accurately reflects the account's current balance.
8. Addressed a UI defect in which the 'Included Codes' in the Claim Summary information for pre-authorization claims for an orthodontic contract were not accurately reflecting the CDT codes submitted in the claim record.
9. Fixed a UI issue in which an incorrect column header was sometimes displayed when printing the Contracts report.
10. Resolved a bug in which the continuation of treatment (COT) claims would continue to be generated beyond the completion of the orthodontic contract.
11. Addressed an issue with the configuration of orthodontic contracts that could cause application performance issues if the contract schedule exceeded a nominal timeframe (e.g., 60 months).

12. Fixed a bug in which the transactions of the Payment History and Schedule of an orthodontic contract were presented out of date order.
13. Resolved a defect in an orthodontic contract's Truth in Lending Statement in which the final payment amount was correctly calculated and displayed on screen, but incorrectly reported on the printout.
14. Additional (other) coverage information added to claims when an orthodontic contract has multiple insurance schedules.
15. Corrected an issue in which changes to treatment plans (including removal of procedures) would sometimes not be reflected on save without an application refresh.
16. Fixed a bug in which address information was not being displayed on the claim form when printing insurance claims.
17. Resolved an issue in which additional, duplicate COT claims were sometimes generated under certain conditions.
18. Addressed a defect that prevented the printing of claims when the insurance payer record was missing address information.
19. Fixed an issue with the Hard Tissue Chart to address a workflow issue when trying to (visually) reset a tooth that is involved in a multi-tooth restoration.
20. Addressed a bug in the Hard Tissue Chart in which NHS Treatment Plan status was not appropriately updating without an application refresh in some cases.
21. Fixed a defect in which an accepted NHS treatment plan could sometimes not be completed.

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