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02-27-2022 10:06 PM

Sensei Cloud Release 0.1.7461

# Sensei Cloud

Weekly Release

Build 0.1.7461 | February 27th, 2022

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

Next Free Slot Search

In response to customer feedback, Sensei Cloud now provides expanded support for finding available openings in the Schedule DayView. When trying to find a potential opening within a busy schedule, potentially months ahead of time, you now have the ability to quickly identify these specific openings without having to review each day and hunt for them. This now includes the ability to search for openings in the schedule across dates or even locations (for multi-location practices). The new 'Schedule Openings' functionality provides you with
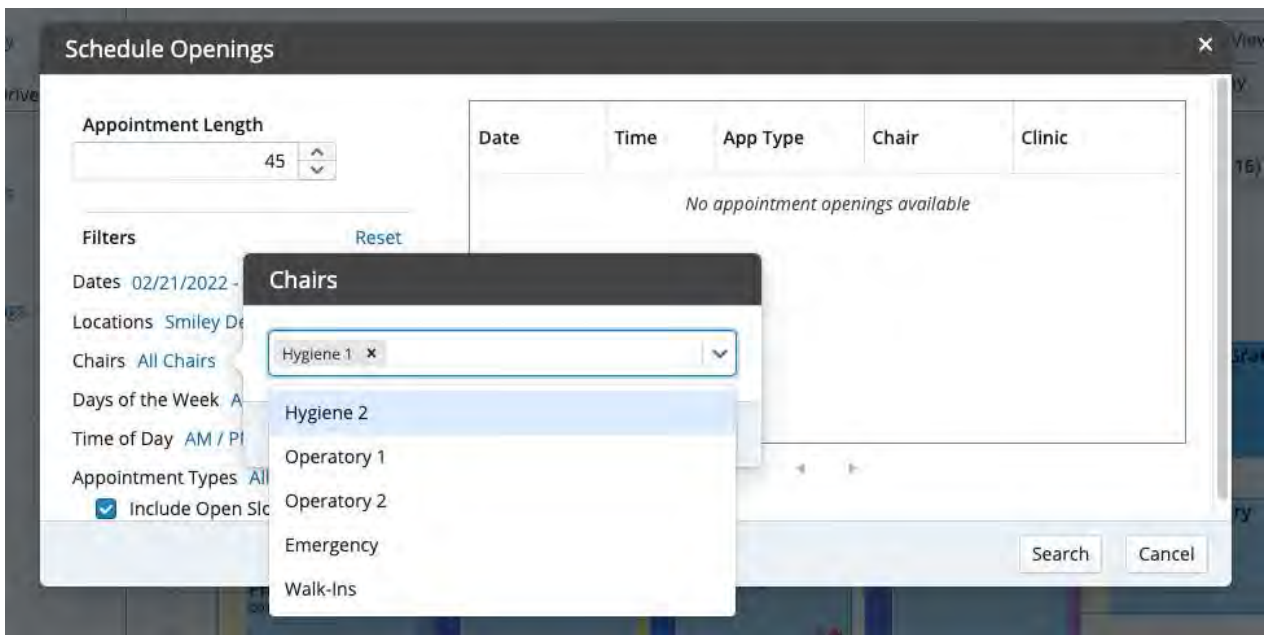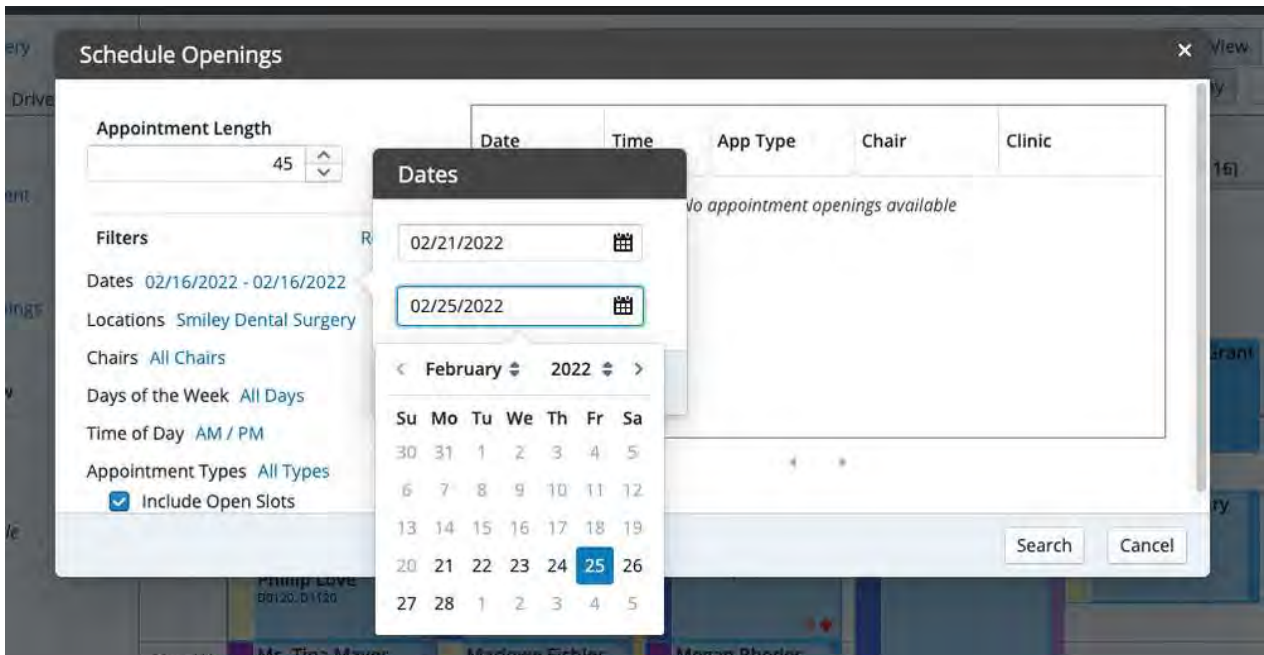
a flexible set of tools for finding available openings in your practice's schedule, based on various criteria that you define. NOTE: This is an enhanced version of the existing 'Today's Schedule Openings' function, originally released on 07.29.2020 (build 0.1.5130), which only identifies schedule openings for the current date (within a single location).
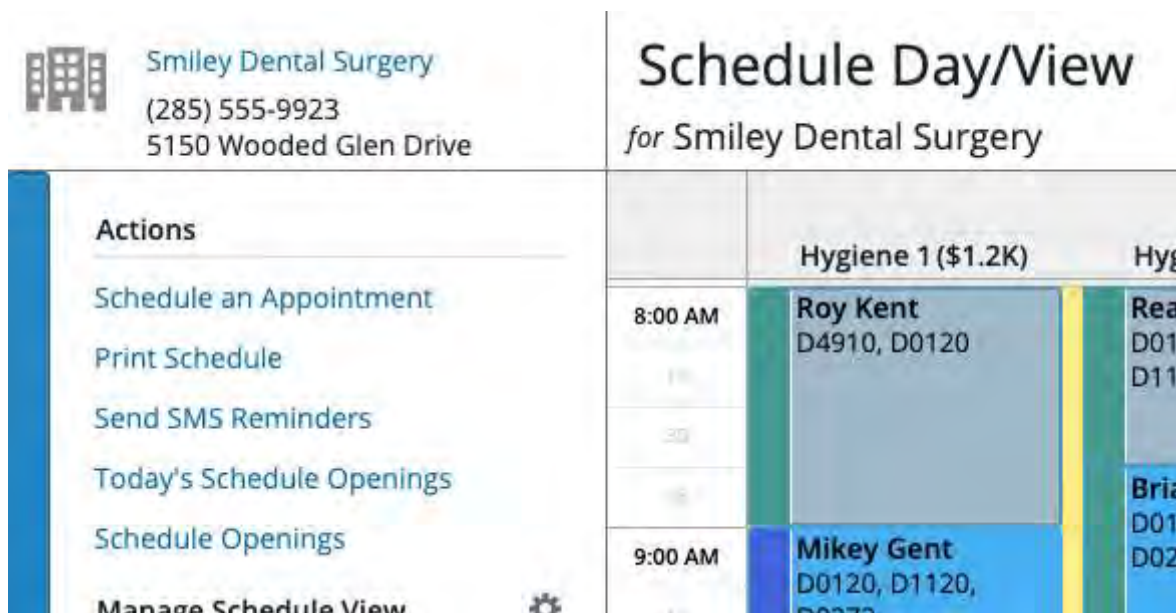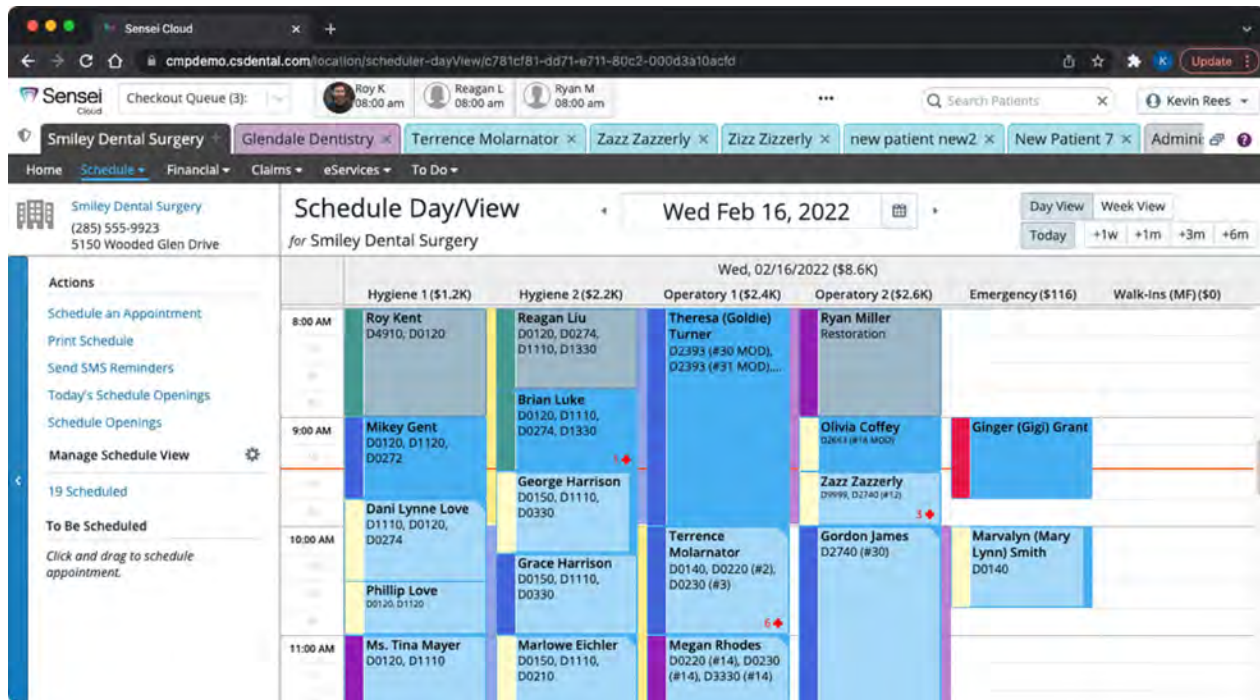
Click on the new 'Schedule Openings' in the side panel of the Schedule DayView to search for available slots in your practice's appointment book [Location Tab > Schedule > Day/Week View]. The search criteria defaults based on your current usage context, although all filter values can be modified to suit your current needs. This includes:

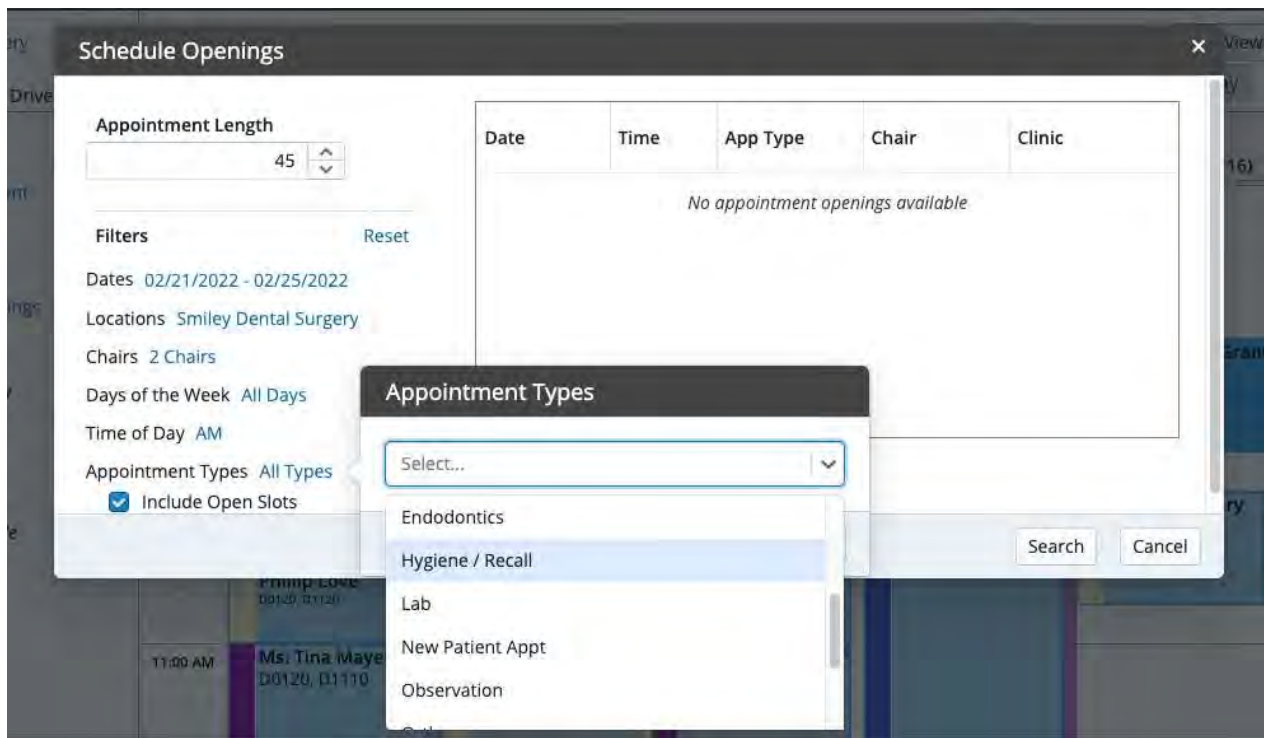- Appointment Length - Used to define the opening length or duration required for the appointment to be booked.
    - Filter value defaults based on the current location's base time unit [Administration Tab > Scheduler > Schedule Settings], but can be adjusted in 5 minute increments depending on the required opening duration.
- Dates - Used to define the date(s) to include in the search for schedule openings.
    - Filter value defaults to the current date(s) in view, but can be changed to any single date or contiguous date range (up to 30 days).
    - Note: Filter value can include the current date or any future date(s).
- Locations - Used to define which (active) location(s) to include in the search for schedule openings.
    - Filter value defaults to the current location, but can be modified to any single (active) location or a subset of locations.
    - Note: Practices with multiple locations can search across some or all (active) locations; however, the locations included must share the same base time unit (i.e., the same single time slot length).
- Chairs - Used to define which (active) chair(s) to include in the search for schedule openings.
    - Filter value defaults to the current set of (active) chairs, but can be updated to any single chair or subset of chairs.
    - Note: Used to include identified openings in (active) chairs, even when hidden from the user's current schedule view [Location Tab > Schedule > Day/Week View > 'Manage Schedule View' (Cog) > 'Select Chairs'].
    - Note: Available chairs must be active and are based on the current 'Locations' filter value, only including active chairs from the locations included in the search.
- Days of the Week - Used to define which day(s) of the week to include in the search for schedule openings.
    - Filter value defaults to all week days (i.e., Monday through Sunday), but can be changed to any single day or subset of days to include in your opening search.
    - Note: Search results automatically exclude days / dates on which the associated locations are set as 'closed'.

- Time of Day - Used to define which range of hours (i.e., morning vs. afternoon / evening) to include in the search for schedule openings.
  - Filter value defaults to both morning (AM) and afternoon (PM), but can be adjusted to limit the search to only morning or afternoon openings.
- Appointment Types - Used to define which appointment type blocks, based on applied block booking templates, to include in the search for schedule openings.
  - Filter value defaults to include all (active) appointment types [Administration Tab > Practice Settings > Appointment Types].
  - Note: Results reflect the calculated openings within any defined appointment type-based blocks as specified in the block booking template [Administration Tab > Templates > Block Booking Templates] that has been applied to the day(s) being searched [Administration Tab > Scheduler > Location Schedule Planning].
  - Note: Results reflect the calculated openings based on an applied block booking template, even if the 'Block Booking Guidance' is currently disabled for your Schedule DayView [Location Tab > Schedule > Day/Week View > 'Manage Schedule View' (Cog) > 'Show Block Booking Guidance'].
- 'Include Open Slots' - Used to define whether or not to include unblocked (i.e., untemplated) time in the results when searching for schedule openings.
  - When checked, search results include openings that have been identified in 'unblocked' time, where the office has not specified that the schedule time is reserved for appointments of a particular type. Note: These openings are designated as 'OPEN SLOT' in the search results.
  - When unchecked, search results exclude any openings that are not specifically located within 'blocked' time, as defined by the block booking template applied to the calendar date(s).
  - Note: Offices that do not use block booking templates or do not apply block booking templates to schedule dates should always leave this option checked.
  - Note: It is suggested that offices that use block booking templates that do not fully block out the schedule's working hours also leave this option checked.

Schedule Openings ✕ View

Appointment Length
15 ⌃⌄

Date	Time	App Type	Chair	Clinic
		No appointment openings available		

Filters   Reset

Dates 02/16/2022 - 02/16/2022

Locations Smiley Dental Surgery

Chairs All Chairs

Days of the Week All Days

Time of Day AM / PM

Appointment Types All Types

☑ Include Open Slots

◄ ►

Search   Cancel

Schedule Openings ✕ View

Appointment Length
45 ⌃⌄

Date	Time	App Type	Chair	Clinic

Dates

Filters   R

Dates 02/16/2022 - 02/16/2022

Locations Smiley Dental Surgery

Chairs All Chairs

Days of the Week All Days

Time of Day AM / PM

Appointment Types All Types

☑ Include Open Slots

02/21/2022 📅

02/25/2022 📅

‹   **February** ⇕   **2022** ⇕   ›

Su	Mo	Tu	We	Th	Fr	Sa
30	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	1	2	3	4	5

◄ ►

Search   Cancel

Schedule Openings ✕ View

Appointment Length
45 ⌃⌄

Date	Time	App Type	Chair	Clinic
		No appointment openings available		

Filters   Reset

Dates 02/21/2022 -

Locations Smiley De

Chairs All Chairs

Days of the Week A

Time of Day AM / Pl

Appointment Types All

☑ Include Open Slo

Chairs

Hygiene 1 ✕   ⌄

Hygiene 2

Operatory 1

Operatory 2

Emergency

Walk-Ins

◄ ►

Search   Cancel

Once you have defined your search criteria, click search to generate the relevant schedule openings. Results are determined by finding openings in the schedule that can accommodate the specified appointment length and meet the defined criteria. As previously alluded to, no schedule openings are calculated for days on which the associated office is set as closed [Administration Tab > Scheduler > Location Schedule Planning]. Similarly, if a provider is associated with a chair and is 'set as closed' (e.g., no working hours that day), then the chair is set as closed and no openings are available for that chair (on that day) [Administration Tab > Scheduler > Provider Schedule Planning]. In addition to the working hours for the location and/or providers (when associated with chairs), 'time locks' that have been applied to the Schedule DayView also refine the schedule openings [Location Tab > Schedule > Day/Week View > {Select Time Slots} > {Click 'Lock'}].

The date, time, associated appointment type, chair, and location (clinic) are displayed for each calculated opening. Results are grouped by start time and ordered by chair (in ascending order by left-to-right chair order) When searching across multiple dates, the openings from each date are grouped into a 'page' of results. Simply click on the arrow navigational controls to view the openings associated with any given date. NOTE: When including multiple locations in the

search criteria, results are further grouped by location (in ascending alphabetical order by location name). Openings are displayed in ascending start time order, grouped by location, and then further ordered by chair.

Schedule Openings

Appointment Length: 45

Filters — Reset

Dates 02/21/2022 - 02/25/2022
Locations Smiley Dental Surgery
Chairs 2 Chairs
Days of the Week All Days
Time of Day AM
Appointment Types Hygiene / Recall
☐ Include Open Slots

Date	Time	App Type	Chair	Clinic
02/22/2022	08:00 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/22/2022	08:15 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/22/2022	08:30 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/22/2022	08:45 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery

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Search   Cancel

Schedule Openings

Appointment Length: 45

Filters — Reset

Dates 02/21/2022 - 02/25/2022
Locations Smiley Dental Surgery
Chairs 2 Chairs
Days of the Week All Days
Time of Day AM
Appointment Types Hygiene / Recall
☐ Include Open Slots

Date	Time	App Type	Chair	Clinic
02/25/2022	09:00 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/25/2022	09:15 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/25/2022	09:30 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery
02/25/2022	09:45 am	Hygiene / Recall	Hygiene 1	Smiley Dental Surgery

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Search   Cancel

Once an appropriate opening has been identified, simply click on the associated result to begin booking the appointment. Following the existing appointment booking workflow, search for and select a patient, then define any additional appointment details (e.g., appointment type, procedures, allocated providers, etc.) in the Appointment Card screen, and then click 'Schedule Appointment'. The appointment is automatically booked into the selected schedule opening, automatically navigating you to this context for visual confirmation and review. NOTE: When searching for schedule openings across multiple locations, if the

selected opening is associated with a location that you are not currently viewing, then you need to open the location's Schedule DayView to visually confirm the booking.
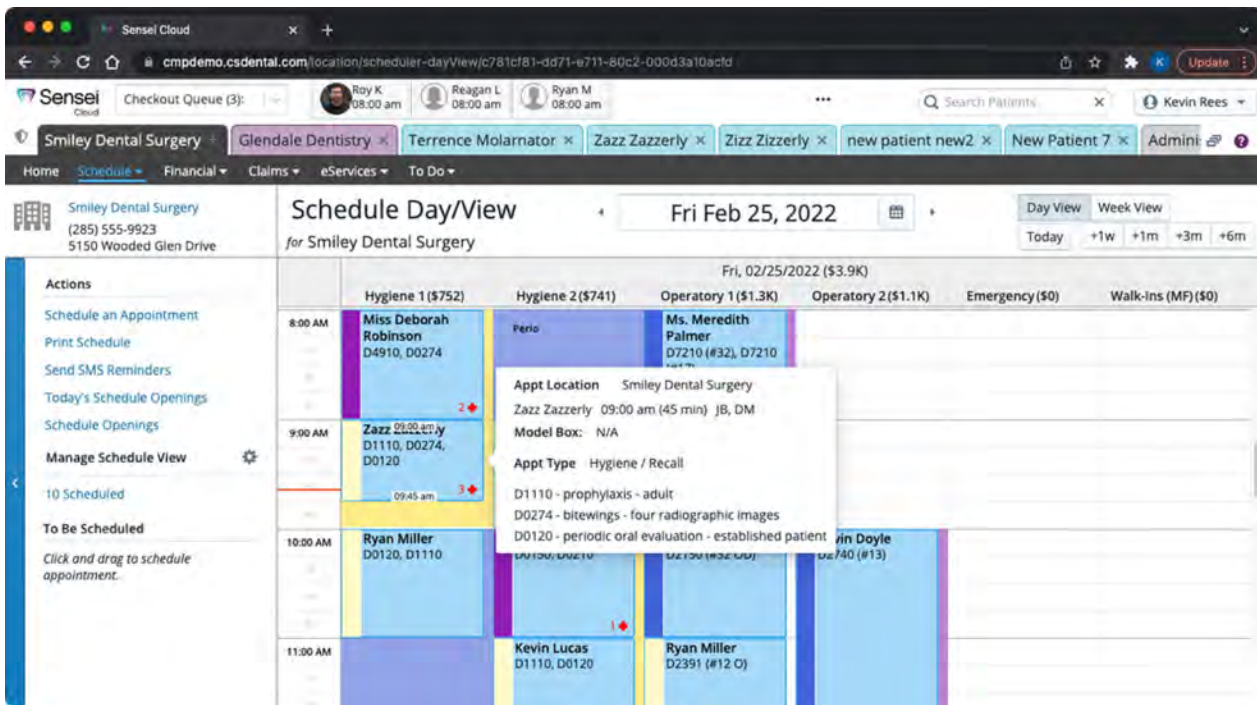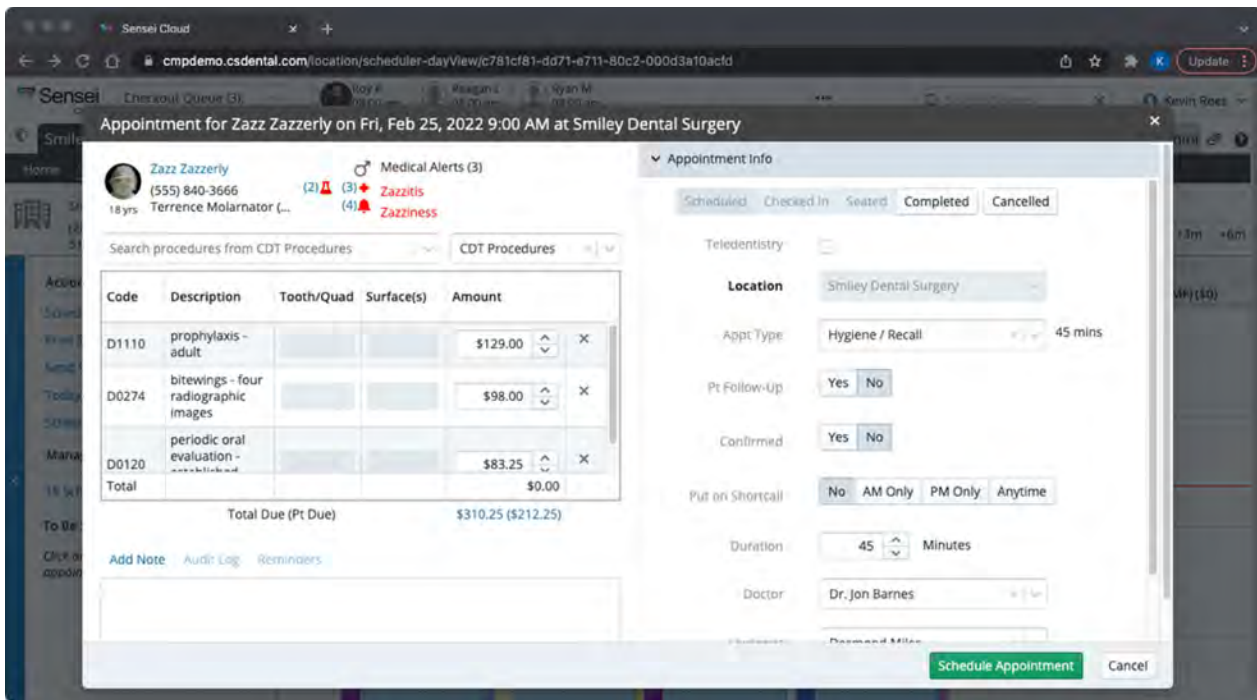
We hope these enhancements better support your scheduling workflow needs. Please let us know what works well and what additional enhancements can be made to improve your scheduling efficiency.

Optimizations and Fixes

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

1. Resolved a defect with the ePrescriptions integration in which electronic prescriptions would not always sync back to the patient's prescription list in Sensei Cloud.

✎ Add tags

👍 | 0 Kudos

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