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Sensei Cloud Release 0.1.7739 (Part 1)

Sensei Cloud

Weekly Release

Build 0.1.7739 | May 22nd, 2022

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

Correcting and Removing Posted Transactions

This week's Sensei Cloud release implements some significant enhancements to the Patient Ledger functionality, based on some of the most frequent feedback from our customer base. Primarily, this involves expanding your capabilities when adjusting posted transactions, enabling you to 'correct' or 'remove' transactions posted with errors (or in error) [Patient Tab > Financials >

Ledger]. Additionally, enhanced filtering logic has been applied to handle the 'corrective' transactions resulting from adjustments, whenever possible, to keep them from cluttering up your financial views and reports.

Although the capabilities for adjusting posted transactions have expanded, the core workflow remains the same. Simply click on a posted transaction in the ledger to expand the line item, which displays its associated details and provides access to the available actions [Patient Tab > Financials > Ledger]. From here, click 'Adjust This {Transaction}' and select either 'Remove Entry' (note: formerly '{Transaction} in Error') or 'Correct Information' (note: formerly 'Wrong Amount'), based on the issue at hand. These options are equally available for most posted transactions, including charges (e.g., procedures), payments, discounts, write-offs, refunds, initial balance transactions, and so on. NOTE: Some orthodontic contract-related transactions, such as recurring 'contract charges' and 'contract adjustments', have limited options as adjusting these transactions will impact the contract's associated schedule.

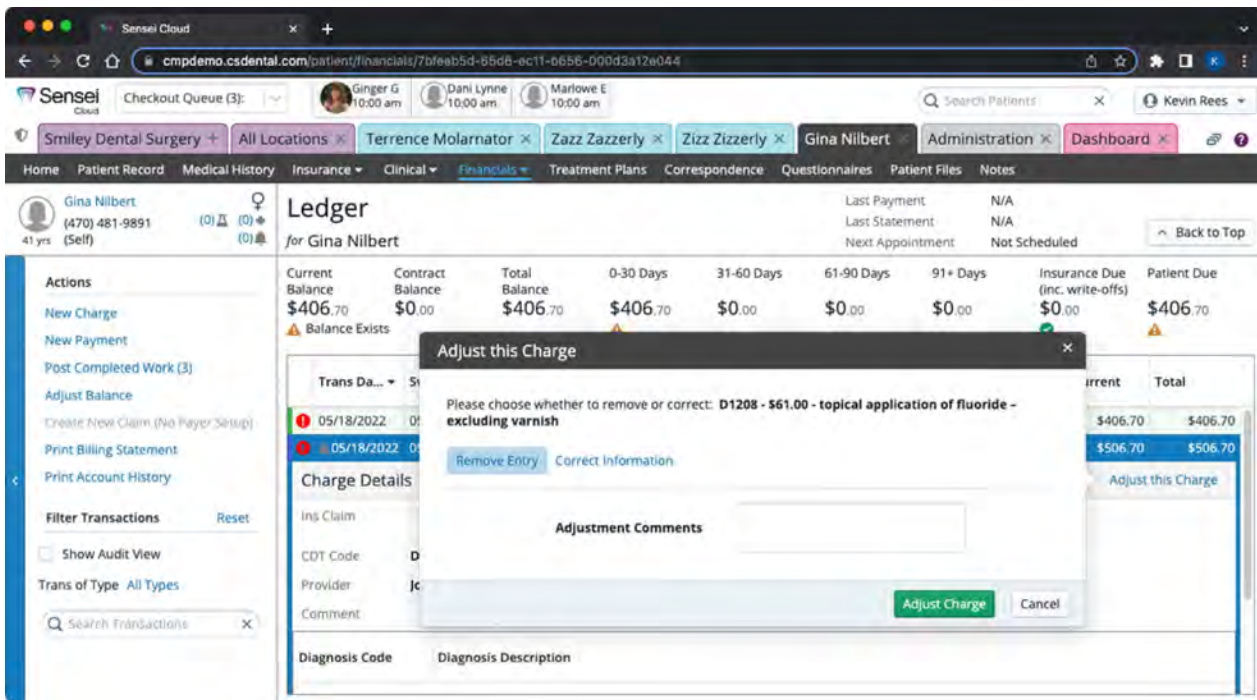
Ledger for Gina Nilbert

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$406.70	\$0.00	\$406.70	\$406.70	\$0.00	\$0.00	\$0.00	\$0.00	\$406.70

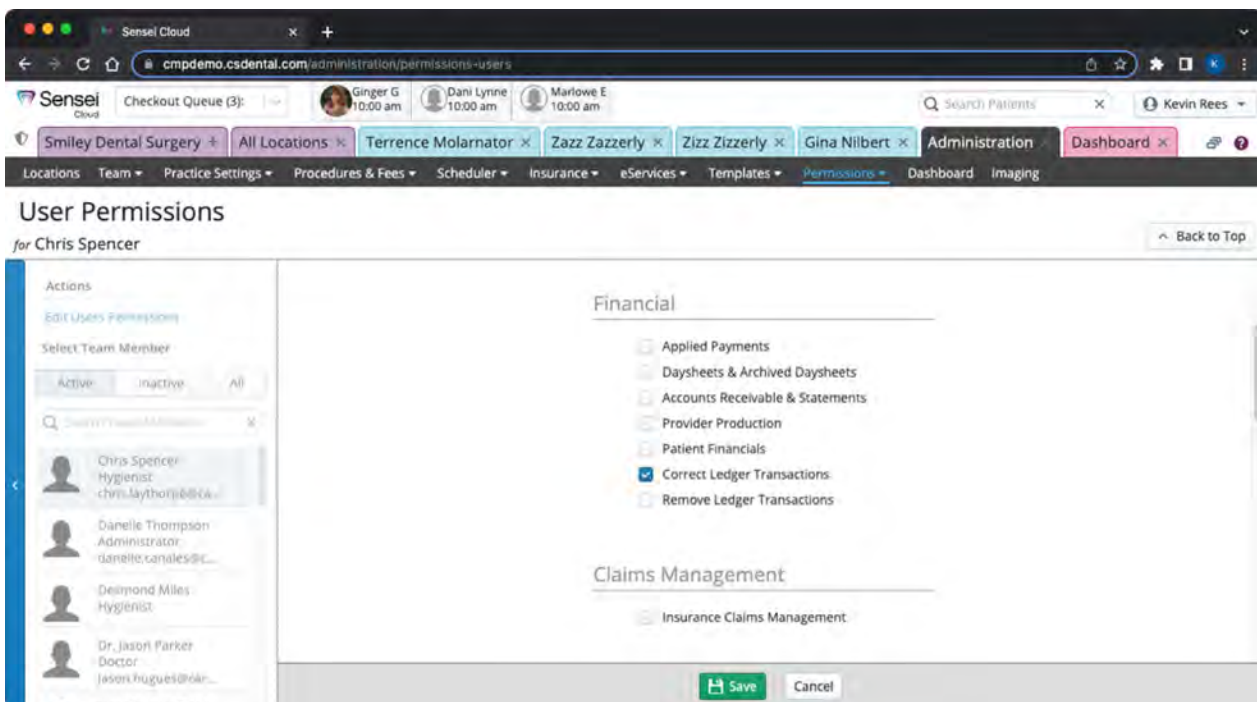
Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/18/2022	05/18/2022	Check	Payment Check	-\$100.00	\$406.70	\$406.70
05/18/2022	05/17/2022	D1208	topical application of fluoride - excluding varnish	\$61.00	\$506.70	\$506.70

Charge Details

Ins Claim	Create New Claim	Tooth/Quad	Already Paid	\$0.00
CDT Code	D1208	Surface(s)	Left to be Paid	\$61.00
Provider	Jon Barnes	Posted By	Danelle Thompson at 12...	
Comment		Location	Smiley Dental Surgery	



There are two new 'Financial' settings in the 'User Permissions' that can be used to control which team members have access to one or both of these adjustment functions ('Correct Ledger Transactions' and 'Remove Ledger Transactions') [Administration Tab > Permissions > User Permissions]. NOTE: As is currently the case with all Sensei Cloud permissions, team members in the 'Administrators' group are automatically granted access to these functions [Administration Tab > Permissions > Group Permissions].



As with the workflow for posting an adjustment, the outcomes from posting a 'Removal' or 'Correction' adjustment are also largely unchanged. IMPORTANT: As will be discussed, while 'corrective' (offsetting) transactions get posted and the (original) 'removed' or 'corrected' transactions are retained, they are hidden from view by default. In other words, we maintain all posted transactions for accurate record-keeping (and make them readily accessible for review), but we avoid the related visual clutter in the ledger views and financial reporting by automatically filtering the unnecessary 'noise' from view.

When completing a 'Remove Entry' adjustment to a posted transaction:

- The original (adjusted) transaction is retained and flagged as 'REMOVED'; and
- A 'corrective', mathematically-offsetting transaction is added to adjust the account balance accordingly and flagged as 'ADJUSTMENT: {Transaction Type} {Adjustment Type}'.
- NOTE: Both transactions are automatically hidden from the default Ledger view.

The screenshot displays the 'Ledger' for patient Gina Nilbert. The interface includes a navigation menu on the left with options like 'New Charge', 'New Payment', and 'Adjust Balance'. The main area shows a summary of the account balance and a table of transactions.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/18/2022	05/18/2022	Check	Payment Check	-\$100.00	\$406.70	\$406.70
05/18/2022	05/17/2022	D1208	topical application of fluoride - excluding varnish	\$61.00	\$506.70	\$506.70
05/18/2022	05/17/2022	D0210	intraoral - complete series of radiographic images	\$182.00	\$445.70	\$445.70
05/18/2022	05/17/2022	D1110	prophylaxis - adult	\$129.00	\$263.70	\$263.70
05/18/2022	05/17/2022	D0150	comprehensive oral evaluation - new or established patient	\$134.70	\$134.70	\$134.70

The screenshot shows the Sensei Cloud interface for patient Gina Nilbert. The Ledger summary shows a Current Balance of \$406.70 and a Patient Due amount of \$406.70. A modal window titled "Adjust this Charge" is open, displaying a transaction from 05/18/2022 with a description: "D1208 - \$61.00 - topical application of fluoride - excluding varnish". The modal offers options to "Remove Entry" or "Correct Information". The "Adjustment Comments" field contains "Pt declined fluoride".

The screenshot shows the Ledger for Gina Nilbert after the adjustment. The Current Balance is now \$345.70 and the Patient Due amount is \$345.70. The transaction table below shows the original transaction and the corrective adjustment.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/18/2022	05/18/2022	Check	Payment Check	-\$100.00	\$345.70	\$345.70
05/18/2022	05/17/2022	D0210	Intraoral - complete series of radiographic images	\$182.00	\$445.70	\$445.70
05/18/2022	05/17/2022	D1110	prophylaxis - adult	\$129.00	\$263.70	\$263.70
05/18/2022	05/17/2022	D0150	comprehensive oral evaluation - new or established patient	\$134.70	\$134.70	\$134.70

When completing a 'Correct Information' adjustment to a posted transaction:

- The original (adjusted) transaction is retained and flagged as 'CORRECTED'; and
- A 'corrective', mathematically-offsetting transaction is added to adjust the account balance accordingly and flagged as 'ADJUSTMENT: {Transaction Type} {Adjustment Type}'; and
- A new standard transaction is posted, which contains the corrected information.

- NOTE: Only the new, resulting transaction (e.g., the correct one) is visible in the Ledger by default.

Ledger for Roy Kent

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$202.25	\$0.00	\$202.25	\$202.25	\$0.00	\$0.00	\$0.00	\$0.00	\$202.25

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/20/2022	05/20/2022	D0120	periodic oral evaluation - established patient	\$83.25	\$202.25	\$202.25
05/20/2022	05/20/2022	D4910	periodontal maintenance	\$119.00	\$119.00	\$119.00
05/17/2022	05/17/2022	Credit Card	Payment Credit Card	-\$700.00	\$0.00	\$0.00
04/19/2022	04/19/2022	Write-Off	WRITE-OFF: Contracted Insurance	-\$400.00	\$700.00	\$700.00
04/08/2022	04/08/2022	D2740	(#10) crown - porcelain/ceramic	\$1,100.00	\$1,100.00	\$1,100.00
08/31/2021	08/31/2021	Credit Card	Payment Credit Card	-\$1,008.50	\$0.00	\$0.00
08/31/2021	08/26/2021	D1206	topical application of fluoride varnish	\$61.00	\$1,008.50	\$1,008.50
08/31/2021	08/26/2021	D0120	periodic oral evaluation - established patient	\$83.25	\$947.50	\$947.50
08/31/2021	08/26/2021	D1120	prophylaxis - child	\$99.00	\$864.25	\$864.25
08/26/2021	08/26/2021	D1206	topical application of fluoride varnish	\$61.00	\$765.25	\$765.25

Ledger for Roy Kent

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$202.25	\$0.00	\$202.25	\$202.25	\$0.00	\$0.00	\$0.00	\$0.00	\$202.25

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
04/08/2022	04/08/2022	D2740	(#10) crown - porcelain/ceramic	\$1,100.00	\$1,100.00	\$1,100.00

Charge Details

Inis Claim	Create New Claim	Tooth/Quad	10	Already Paid	\$1,100.00
CDT Code	D2740	Surface(s)		Left to be Paid	\$0.00
Provider	Jon Barnes	Posted By	Daneille Thompson at 4:...		
Comment		Location	Smiley Dental Surgery		

Diagnosis Code: [Empty] Diagnosis Description: [Empty]

No codes to display.

Adjust this Charge

Please choose whether to remove or correct: **D2740 - \$1,100.00 - crown - porcelain/ceramic**

Remove Entry Correct Information

Amount: \$900.00

Location: Glendale Dentistry

Provider: Dr. Jon Barnes

Adjustment Comments: Posted to wrong location, fee adjusted

Adjust Charge Cancel

Ledger for Roy Kent

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$202.25	\$0.00	\$202.25	\$2.25	\$0.00	\$0.00	\$0.00	\$0.00	\$2.25

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/20/2022	04/08/2022	D2740	(#10) crown - porcelain/ceramic	\$900.00	\$2.25	\$2.25
05/20/2022	05/20/2022	D0120	periodic oral evaluation - established patient	\$83.25	-\$897.75	-\$897.75
05/20/2022	05/20/2022	D4910	periodontal maintenance	\$119.00	-\$981.00	-\$981.00
05/17/2022	05/17/2022	Credit Card	Payment Credit Card	-\$700.00	-\$1,100.00	-\$1,100.00
04/19/2022	04/19/2022	Write-Off	WRITE-OFF: Contracted Insurance	-\$400.00	-\$400.00	-\$400.00
08/31/2021	08/31/2021	Credit Card	Payment Credit Card	-\$1,008.50	\$0.00	\$0.00
08/31/2021	08/26/2021	D1206	topical application of fluoride varnish	\$61.00	\$1,008.50	\$1,008.50
08/31/2021	08/26/2021	D0120	periodic oral evaluation - established patient	\$83.25	\$947.50	\$947.50
08/31/2021	08/26/2021	D1120	prophylaxis - child	\$99.00	\$864.25	\$864.25
08/26/2021	08/26/2021	D1206	topical application of fluoride varnish	\$61.00	\$765.25	\$765.25

While the nature of the 'Removal' adjustment has not changed much, the 'Correction' adjustment has been significantly revised. When selecting the 'Correct Information' option, you now have the ability to adjust many more transaction properties compared to the previous restriction to just the transaction amount. While the 'correctable' properties vary by the type of transaction being adjusted, you are now able to make changes to one, several, or all available items when correcting a transaction. These properties include:

- Amount - Used to correct the value of the posted transaction. NOTE: This is restricted for ePayment-based payment transactions, which will need to be completely refunded (e.g., a 'Remove Entry', not a 'Correct Information' adjustment) and a new payment collected.
- Location - Used to correct the location associated with the posted transaction.
- Provider - Used to correct the provider associated with the posted transaction.
- Payment Type (payments only) - Used to correct the payment type associated with the posted transaction. NOTE: This option is disabled for ePayment-based transactions, as you cannot change ePayment transactions to a non-ePayment type (and vice versa).
- Discount Type (discounts only) - Used to correct the discount type associated with the posted transaction.
- Write-Off Type (write-offs only) - Used to correct the write-off type associated with the posted transaction.
- Reference (payments only) - Used to correct the 'Reference' text associated with the posted payment transaction. NOTE: Original text is pre-populated and made available for edits, as needed.
- Transaction Comments - Used to correct the 'Comment' text associated with the posted transaction. NOTE: Original text is pre-populated and made available for edits, as needed.

NOTE: 'Adjustment Comments' are required whenever entering either of the adjustment types ('Remove Entry' or 'Correct Information') to help provide justification or context. Entered text will be displayed as the 'Full Comment' in the transaction details of the offsetting adjustment transaction that gets posted.

Ledger for Roy Kent

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/20/2022	05/20/2022	D4910	periodontal maintenance	\$119.00	-\$981.00	-\$981.00
05/17/2022	05/17/2022	Credit Card	Payment Credit Card	-\$700.00	-\$1,100.00	-\$1,100.00

Payment Details

Trans. Type	Payment	Location	Smiley Dental Surgery	Amount	\$700.00
Payment Type	Credit Card	IS Split Payment	No	Already Applied	\$0.00
Posted By	Danelle Thompson at 6:...	To be Applied			\$700.00

Adjust this Payment

Please choose whether to remove or correct: **Credit Card - \$700.00 - Payment Credit Card**

Amount: \$700.00

Location: Smiley Dental Surgery

Payment Type: Credit Card

Reference:

Transaction Comments:

Adjustment Comments:

SPECIAL CASE: When adjusting posted charges that already have one or more associated insurance claims, this necessarily requires that the claims are canceled and (if needed) resubmitted. When removing or correcting such a charge, you are automatically prompted to cancel all existing claims associated with the charge. In the case of a 'Removal', the existing claims are canceled, the adjustment is posted, and the account balance is updated. In the case of a 'Correction', the existing claims are canceled, the adjustment and new (corrected) transaction are posted, the account balance is updated, and you are automatically prompted to re-generate the (primary) claim. IMPORTANT: This

process can be performed for claims in any status. As such, if the claim has already been transmitted to the payer (or even paid against), then some manual housekeeping may need to happen outside of Sensei Cloud.

Ledger for Zazz Zazerly

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$7,853.92	\$2,249.98	\$10,103.90	\$0.00	\$0.00	\$250.00	\$7,603.92	\$0.00	\$10,103.90

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
06/21/2021	06/21/2021	D0220	(#14) Intraoral - periapical first radiographic image	\$51.00	\$4,288.41	\$6,702.20

Charge Details

Ins Claim	114000000000120P	Tooth/Quad	14	Already Paid	\$0.00
CDT Code	D0220	Surface(s)		Left to be Paid	\$51.00
Provider	Jon Barnes	Posted By	Kevin Rees at 11:49 am		
Comment		Location	Smiley Dental Surgery		

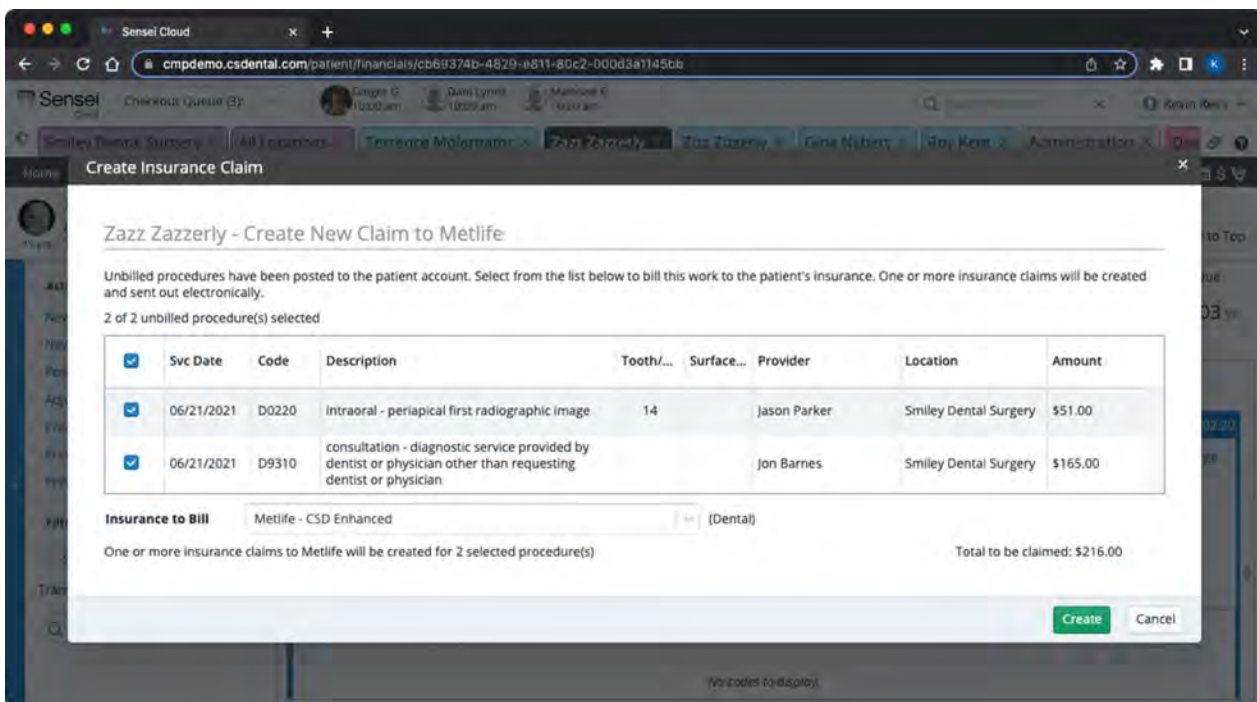
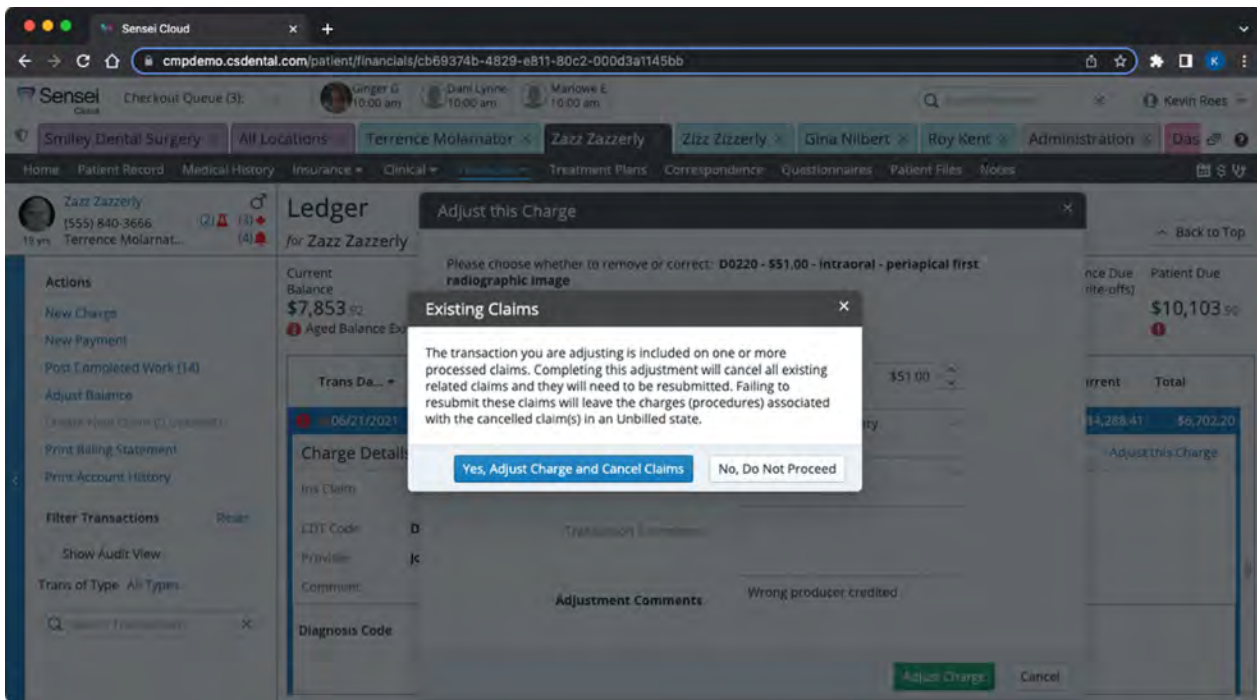
Diagnosis Code: [Empty] | Diagnosis Description: [Empty]

No codes to display.

Adjust this Charge

Please choose whether to remove or correct: **D0220 - \$51.00 - Intraoral - periapical first radiographic image**

Amount	\$51.00
Location	Smiley Dental Surgery
Provider	Dr. Jason Parker
Transaction Comments	[Empty]
Adjustment Comments	Wrong producer credited



While the mechanical behavior and outcomes from adjusting posted transactions has not fundamentally changed, some key changes have been implemented to address your feedback. This includes a change to the native filtering behavior of the Patient Ledger, which now automatically hides the unnecessary transactions from view. This means that the 'corrective' transactions that have a mathematically-offsetting or neutral impact on the patient balance are not cluttering the ledger when you review a patient's account history. For example, this means that for 'Remove Entry' adjustments the original, removed transaction and its mathematically-offsetting ('reverse')

adjustment are both hidden from view, as the net effect on the patient's balance is zero. For 'Correct Information' adjustments, the original, corrected transaction and its mathematically-offsetting ('reverse') adjustment are hidden from view, while only the resulting transaction (e..g, the new, correct one) remains visible.

While hidden from view by default, records of this activity are maintained in Sensei Cloud. As with all posted transactions, the team member who posted the adjustment (and when it was done) are recorded. A new 'Show Audit View' filter is available in the side panel of the Patient Ledger, which can be used to display all of the 'corrective' transactions. NOTE: As previously discussed in the release notes for 5130 (Part 2, from 07.29.2020), 'corrective' (adjustment-based) transactions are only included in statements when they are needed to explain a change in the account balance from a previous statement. When necessary, inclusion in generated statements may occur regardless of whether the transactions are visible in the Patient Ledger view.

The screenshot displays the 'Ledger' for patient Gina Nilbert. The top section shows summary statistics: Current Balance of \$345.70, Contract Balance of \$0.00, and Total Balance of \$345.70. A warning icon indicates 'Balance Exists'. The ledger is broken down by due date: 0-30 Days (\$345.70), 31-60 Days (\$0.00), 61-90 Days (\$0.00), and 91+ Days (\$0.00). Insurance Due is \$0.00, and Patient Due is \$345.70.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/18/2022	05/18/2022	Check	Payment Check	-\$100.00	\$345.70	\$345.70
05/18/2022	05/17/2022	D0210	intraoral - complete series of radiographic images	\$182.00	\$445.70	\$445.70
05/18/2022	05/17/2022	D1110	prophylaxis - adult	\$129.00	\$263.70	\$263.70
05/18/2022	05/17/2022	D0150	comprehensive oral evaluation - new or established patient	\$134.70	\$134.70	\$134.70

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
05/20/2022	05/17/2022	Charge Correction & Removal	ADJUSTMENT: Charge Removal	-\$61.00	\$345.70	\$345.70
05/18/2022	05/18/2022	Check	Payment Check	-\$100.00	\$406.70	\$406.70
05/18/2022	05/18/2022	Payment Correction & Removal	ADJUSTMENT: Payment Correction	-\$100.00	\$506.70	\$506.70
05/18/2022	05/18/2022	Charge Correction & Removal	ADJUSTMENT: Charge Removal	-\$227.00	\$406.70	\$406.70
05/18/2022	05/18/2022	D2391	(#30 O) REMOVED: resin-based composite - one surface, posterior	-\$227.00	\$633.70	\$633.70
05/18/2022	05/18/2022	Cash	CORRECTED: Payment Cash	-\$100.00	\$406.70	\$406.70
05/18/2022	05/17/2022	D1208	REMOVED: topical application of fluoride - excluding varnish	\$61.00	\$506.70	\$506.70
05/18/2022	05/17/2022	D0210	INTRASEAL - complete series of endosseous implants	\$182.00	\$688.70	\$688.70

These enhancements should provide you with more flexibility in the correction of errors that may occur when posting transactions, as well as keeping your financial records free from unnecessary transactional clutter. Please send us your feedback on what works well and what additional improvements can be made in support of your financial tracking and reporting workflows.

[0.1.7739 RELEASE UPDATES CONTINUED ON PART 2]

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kmccall
 CS Dental Employee

05-24-2022 11:04 AM



For more information, see [How to Adjust or Remove Charges on the Patient Ledger](#), [How to Adjust or Remove Payments on the Patient Ledger](#), and [How to Adjust or Remove Write-Offs on the Patient Ledger](#).

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