MOD kevin_moloney
Moderator

05-21-2022 11:15 PM

Sensei Cloud Release 0.1.7739 (Part 2)

Sensei Cloud

Weekly Release

Build 0.1.7739 | May 22nd, 2022

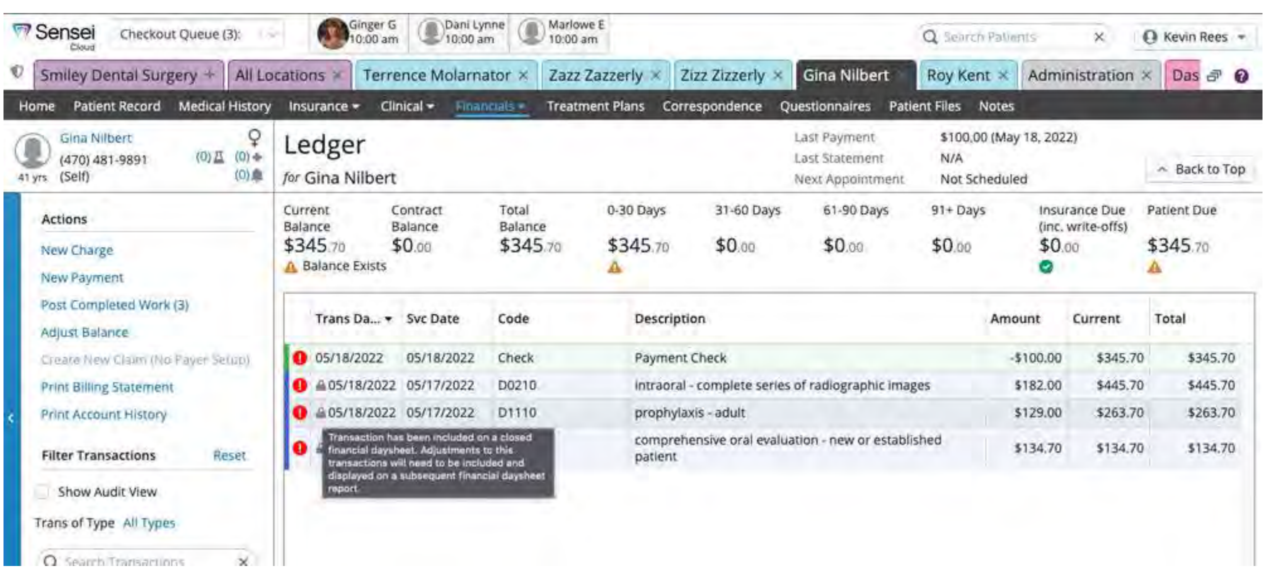
This week's Sensei Cloud updates continue to expand core application functionality and deliver on recent customer requests.

[0.1.7739 RELEASE UPDATES CONTINUED FROM PART 1]

Handling Adjustments in Financial Daysheet Reporting

As an extension of the enhancements to the adjustment functionality in the Patient Ledger, related changes have been implemented in the Financial Daysheet (FD) and its reporting [Location Tab > Financial > Daysheet]. As with the ledger, enhanced filtering logic has been added to limit the 'noise' resulting from the posting of adjustments. Finally, this also includes a new 'Transaction Audit' report in the Financial Daysheet (FD), which maintains records of all the adjustments ('corrections' and 'removals') that occurred during the FD period.

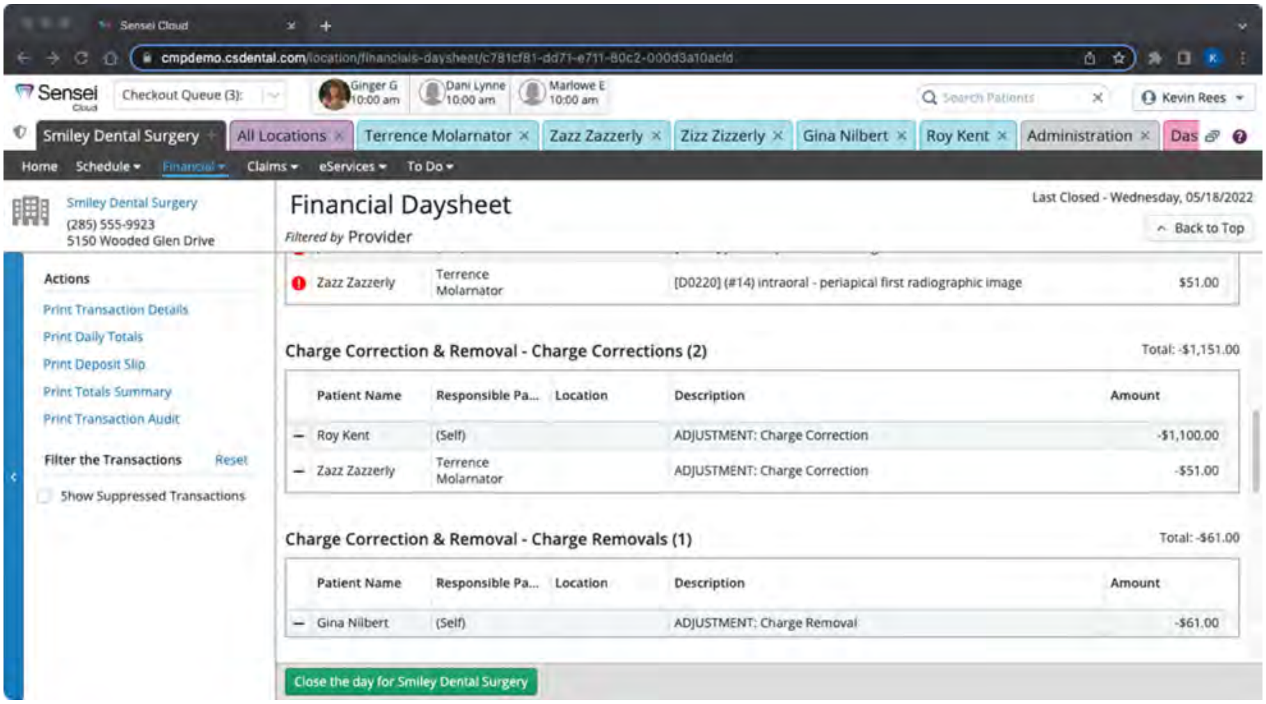
While many of the transactions resulting from adjustments are always hidden by default from the Patient Ledger, this is not necessarily the case for the Financial Daysheet (FD) reporting. To increase the predictability about the impact of making an adjustment to a particular transaction, a new visual indicator (a 'lock') has been added to the Patient Ledger. When present on a transaction, the 'lock' indicates that it has already been included on a closed FD. In other words, the transaction was posted prior to the most recent FD closing and has already been accounted for in the A/R calculations. NOTE: This does not impact your ability to adjust the procedure and does not change how or if the associated adjustment transactions are hidden in the default ledger view. However, it does have an impact on whether the resulting 'corrective' transactions will appear on the FD (both on-screen and in the generated reports). As indicated by the tooltip for the 'lock' indicator, if you adjust a posted transaction that is 'locked', then the 'corrective' transactions that result from the adjustment are included in the current FD period reporting. This is by necessity, as these transactions are needed to explain the math behind the changes in A/R.



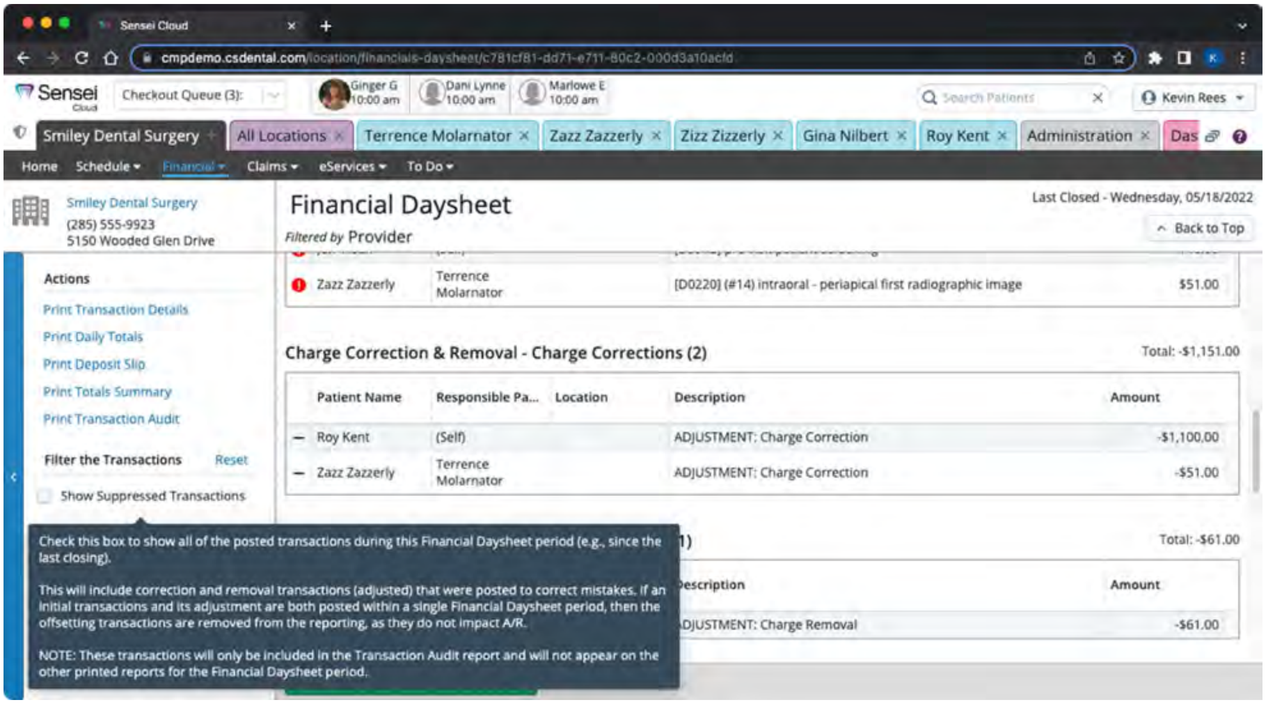
As mentioned, whether or not the ‘corrective’ transactions generated get displayed in the FD reporting ends up being a matter of timing. Simply put, if the posting of the original transaction and its adjustments occur within the same, open FD period (e.g., adjustment to an ‘unlocked’ transaction), then only the A/R-impacting transactions are displayed in the FD, factored in the calculations, and included in the core reporting. For a ‘Removal’, this means that no transactions appear on the FD. For a ‘Correction’, only the final, resulting transaction (e.g., the one with the correct information) appears on the FD.

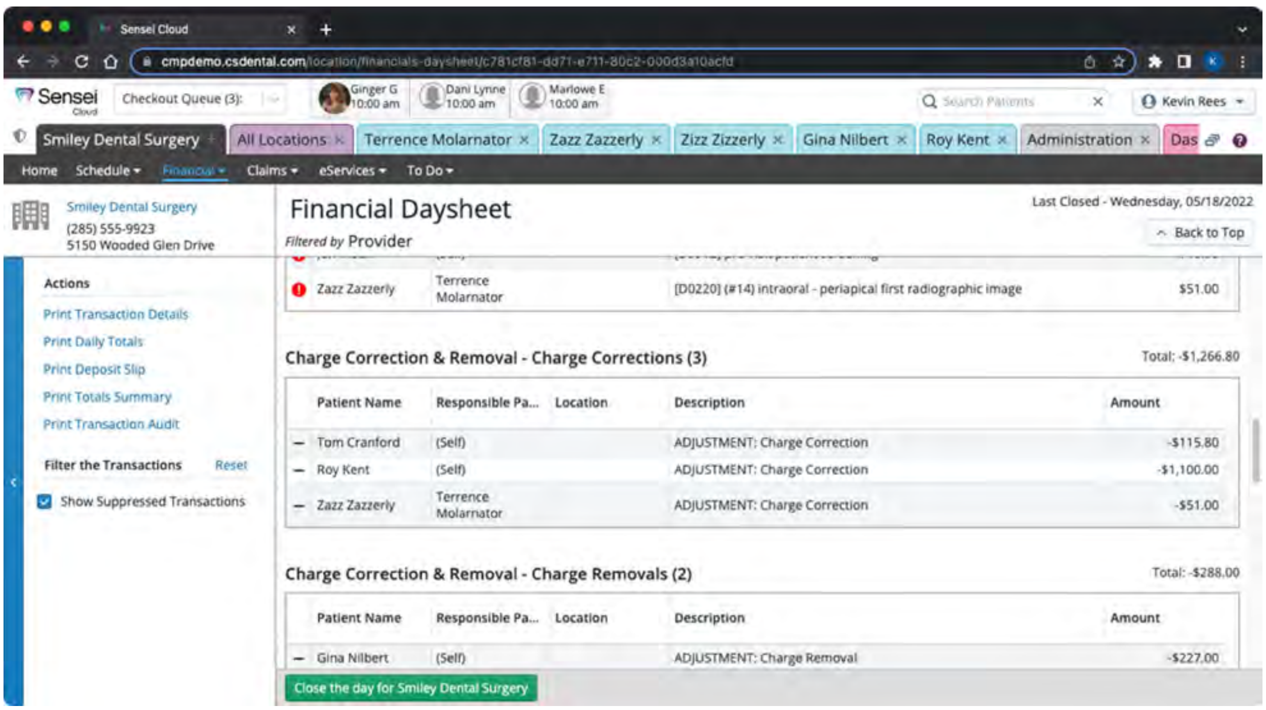
On the other hand, if the adjustment was made against a ‘locked’ transaction, which was already included in a previous (closed) FD period, then the FD includes any ‘corrective’ transactions that are needed to explain the A/R changes. This means:

- For a ‘Removal’, the mathematically-offsetting adjustment (e.g., that reverses the impact to the account balance) is included in the current FD period. NOTE: The original (e.g., removed) transaction does not appear on this FD period, as it was accounted for in a previous FD period that has already been closed.
- For a ‘Correction’, both the mathematically-offsetting adjustment and the new, resulting transaction (e.g., the one with the correct information) are included in the current FD period. NOTE: Again, the original (e.g., corrected) transaction does not appear in this FD period, as it was accounted for in a previous FD period which has already been closed.

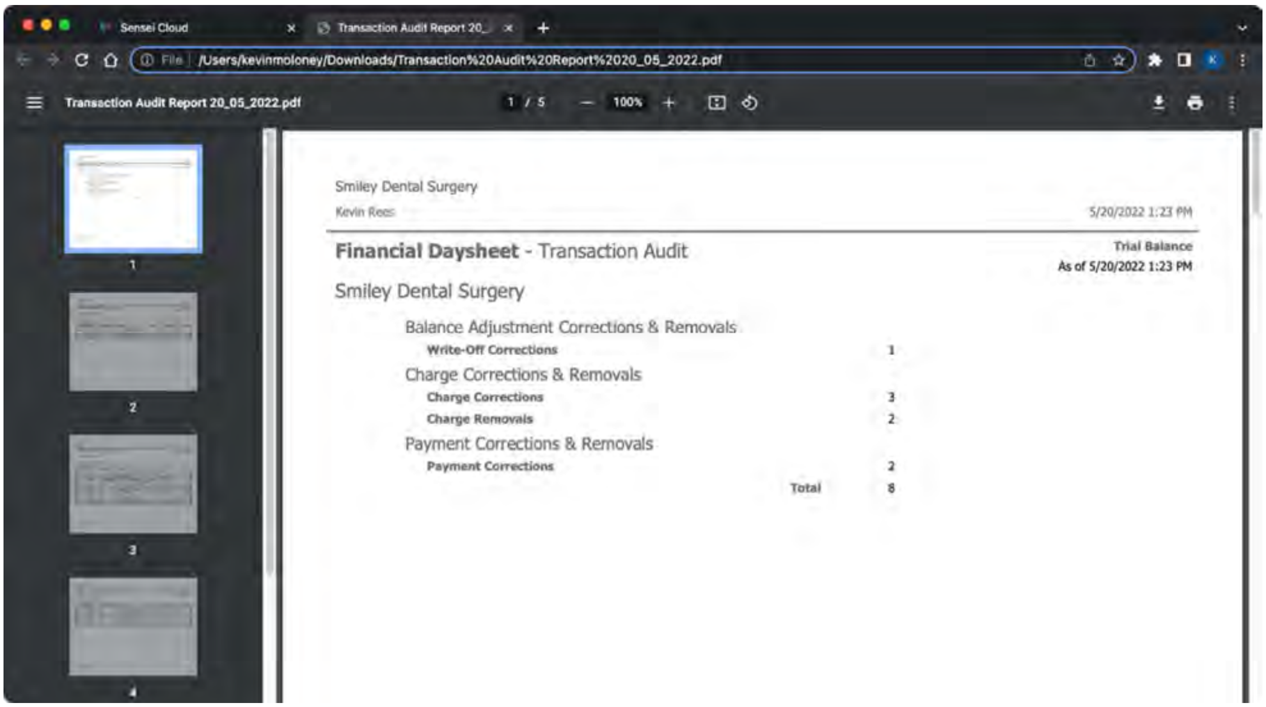


While potentially hidden from the FD reporting, all of the suppressed ‘corrective’ transactions can be reviewed and verified in two ways - using the new ‘Show Suppressed Transactions’ filter or generating the new ‘Transaction Audit’ report. Both are available via the side panel of the Financial Daysheet. Along with the Ledger’s ‘Show Audit View’ filter option, these ‘safety valves’ are provided to protect the practice and facilitate your review of possible transaction irregularities. Check the ‘Show Suppressed Transactions’ option to temporarily display the hidden ‘corrective’ transactions, which do not mathematically impact the FD reporting. NOTE: While the suppressed transactions are displayed (by checking this view filter), they are still not included in the core FD reporting (e.g., Transaction Details, Deposit Slip, etc.). However, they are fully accounted for in the transaction counts and totals summary at the top of the Financial Daysheet UI and in the subsequent transaction tables. Additionally, they are also accounted for in the new Transaction Audit report, as discussed below.





A new Financial Daysheet report has been created to provide a record of all of the transaction adjustments that occur during the FD period. As with all FD reports, a live copy can be generated at any time during the open FD period by clicking the associated hyperlink (e.g., 'Print Transaction Audit') in the side panel. Additionally, it is automatically generated and stored with the other core FD reports whenever the FD is closed [Location Tab > Financial > Archived Daysheets]. The 'Transaction Audit' report includes a record of all adjustments (and their related transactions) posted during the FD period, whether or not they are displayed and included in the main FD reporting (e.g., whether the adjustment was made to a 'locked' or 'unlocked' transaction). A summary page is provided with the breakdown of the various adjustment types that occurred during the FD period. On the subsequent pages of the report, the posted adjustments are grouped by type (e.g., adjustments to charges versus payments, etc.) and subtype (e.g., 'Corrections' versus 'Removals'). For each adjustment, all of the related transactions are grouped together (e.g., the original transaction, the 'corrective' adjustment, and the new transaction, as applicable), along with the transaction details, to provide a clear picture of what happened.



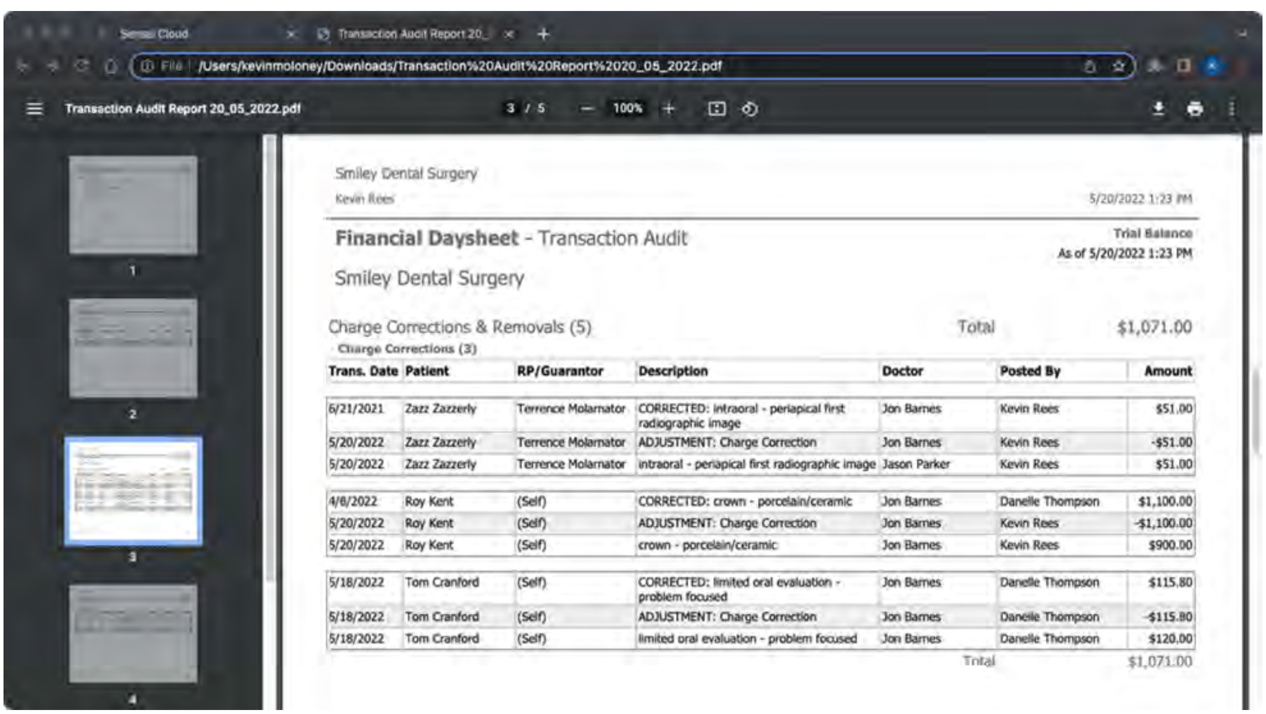
Smiley Dental Surgery
Kevin Rees 5/20/2022 1:23 PM

Financial Daysheet - Transaction Audit

Trial Balance
As of 5/20/2022 1:23 PM

Smiley Dental Surgery

Balance Adjustment Corrections & Removals	
Write-Off Corrections	1
Charge Corrections & Removals	
Charge Corrections	3
Charge Removals	2
Payment Corrections & Removals	
Payment Corrections	2
Total	8



Smiley Dental Surgery
Kevin Rees 5/20/2022 1:23 PM

Financial Daysheet - Transaction Audit

Trial Balance
As of 5/20/2022 1:23 PM

Smiley Dental Surgery

Charge Corrections & Removals (5) Total $1,071.00

Charge Corrections (3)

Trans. Date	Patient	RP/Guarantor	Description	Doctor	Posted By	Amount
6/21/2021	Zazz Zazzerly	Terrence Molarnator	CORRECTED: intraoral - periapical first radiographic image	Jon Barnes	Kevin Rees	$51.00
5/20/2022	Zazz Zazzerly	Terrence Molarnator	ADJUSTMENT: Charge Correction	Jon Barnes	Kevin Rees	-$51.00
5/20/2022	Zazz Zazzerly	Terrence Molarnator	intraoral - periapical first radiographic image	Jason Parker	Kevin Rees	$51.00
4/8/2022	Roy Kent	(Self)	CORRECTED: crown - porcelain/ceramic	Jon Barnes	Danelle Thompson	$1,100.00
5/20/2022	Roy Kent	(Self)	ADJUSTMENT: Charge Correction	Jon Barnes	Kevin Rees	-$1,100.00
5/20/2022	Roy Kent	(Self)	crown - porcelain/ceramic	Jon Barnes	Kevin Rees	$900.00
5/18/2022	Tom Cranford	(Self)	CORRECTED: limited oral evaluation - problem focused	Jon Barnes	Danelle Thompson	$115.80
5/18/2022	Tom Cranford	(Self)	ADJUSTMENT: Charge Correction	Jon Barnes	Danelle Thompson	-$115.80
5/18/2022	Tom Cranford	(Self)	limited oral evaluation - problem focused	Jon Barnes	Danelle Thompson	$120.00
					Total	$1,071.00

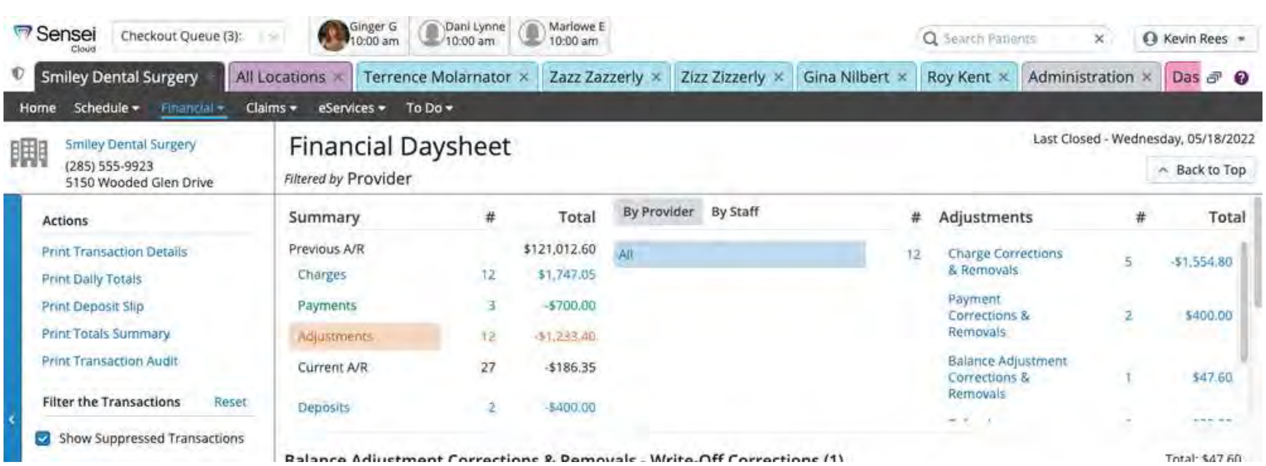
SPECIAL CASE: If the associated location is changed as part of a 'Correction' adjustment (e.g., from Location 1 to Location 2), then the resulting 'corrective' transactions appear in the Financial Daysheet reporting of each location, accordingly.

- If the original transaction (e.g., the one being corrected) is 'unlocked', then no transactions are displayed in the originating location's FD (Location 1). However, the resulting (correct) transaction is displayed in the new location's FD (Location 2). All of the 'suppressed' transactions are included in the 'Transaction Audit' report for the original location (Location 1). As explained above, this report includes all of the transactions resulting from this adjustment. In this case, it includes the original (corrected) transaction and mathematically-offsetting adjustment from the current FD period of Location 1, as well as the new (correct) transaction posted to Location 2.
- If the original transaction (e.g., the one being corrected) is 'locked', then the offsetting adjustment transaction is displayed in the originating location's FD (Location 1), but the resulting (correct) transaction is displayed in the new location's FD (Location 2). Again, all of the 'suppressed' transactions are included in the Transaction Audit report for the original location (Location 1). This includes the original (corrected) transaction from the previous FD period of Location 1, the mathematically-offsetting adjustment posted in the current FD period of Location 1, and the new (correct) transaction posted to Location 2.

Finally, several related updates were made to the Financial Daysheet to handle these improvements, as well as to address some known gaps in the FD reporting resulting from the continual expansion of Sensei Cloud. The majority of these changes focus on the renaming and categorization of transaction types in the FD reporting, including the 'accounting bucket' filters at the top of the FD screen. These label and grouping changes are also reflected in the FD reporting, such as the Daily Totals and Transaction Details reports. Updates to the Financial Daysheet reporting include:

- The 'Adjustments' bucket logic has been updated to include all adjustment type transactions posted during the current FD period. The transaction count and total in the 'Summary' now reflect these changes.

- The ‘Adjustments’ breakdown (e.g., when clicking ‘Adjustments’ in the FD banner ‘Summary’) now includes a grouping-based breakdown of posted adjustments, including:
  - Initial balance transactions (e.g.., Initial debit and credit balance transactions)
  - Initial balance corrections and removals (e.g., Adjustments made to initial balance transactions)
  - Refunds, Write-Offs, and Discounts (note: tracked separately)
  - Balance adjustment corrections and removals (e.g., Adjustments made to refunds, write-offs, and discounts)
  - Orthodontic contract adjustments (e.g., Contract adjustments and closures)
  - Charge corrections and removals
  - Payment corrections and removals
- The tables of transactions included in the on-screen reporting have been updated to include new transaction subcategories, including the separation of ‘Corrections’ and ‘Removals’ for the adjustment of different transaction types.
- Related content and labeling updates have also been made to the Transaction Details, Daily Totals, and Totals Summary reports.The separation and inclusion of the new adjustment categories are now both displayed and accounted for in the FD period’s calculations, as appropriate.
- Offsetting transactions posted during the current FD period are excluded from the on-screen reporting (as previously discussed) and in the printed reports.

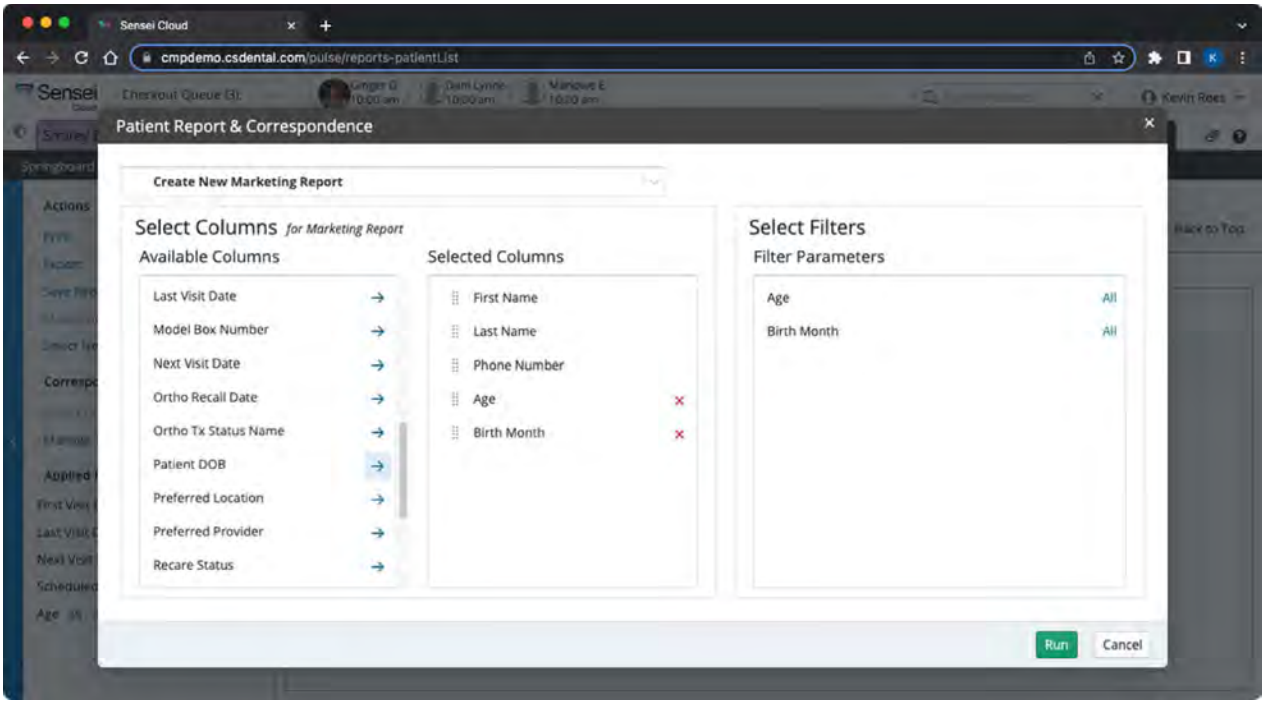


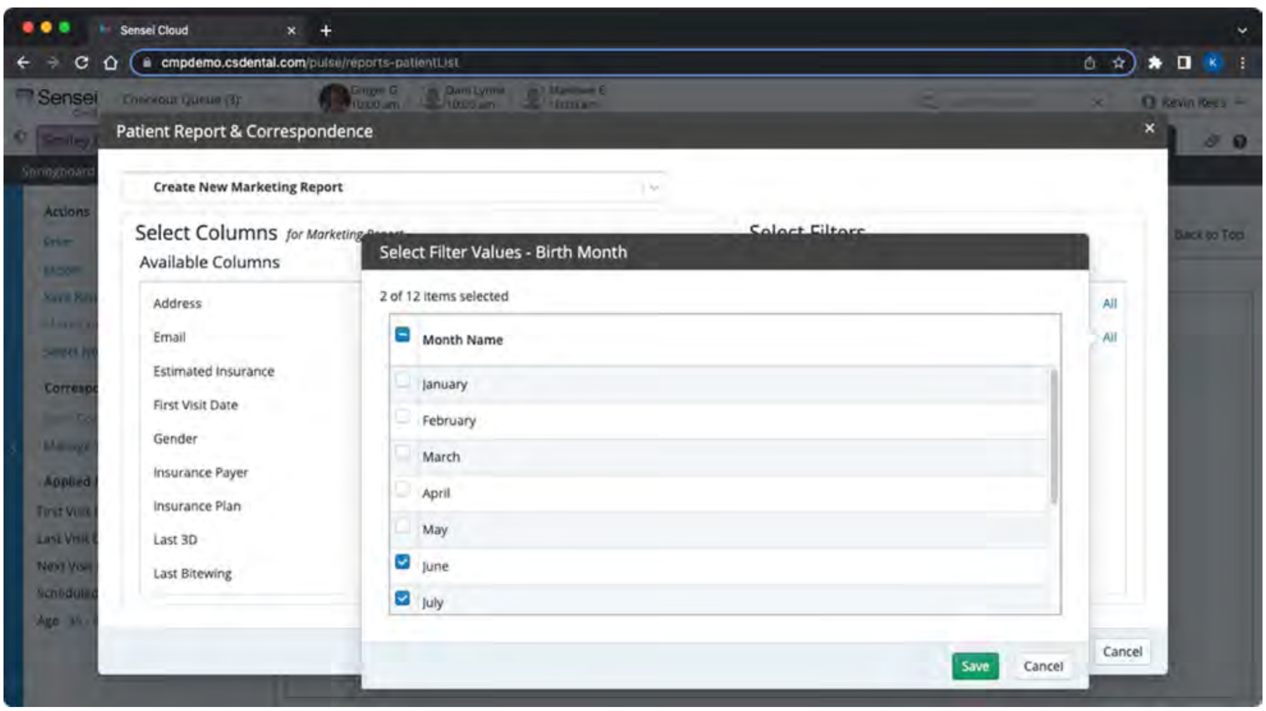
These enhancements should provide you with more flexibility in the correction of errors that may occur when posting transactions, as well as keeping your financial records free from unnecessary transactional clutter. Please send us your feedback on what works well and what additional improvements can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

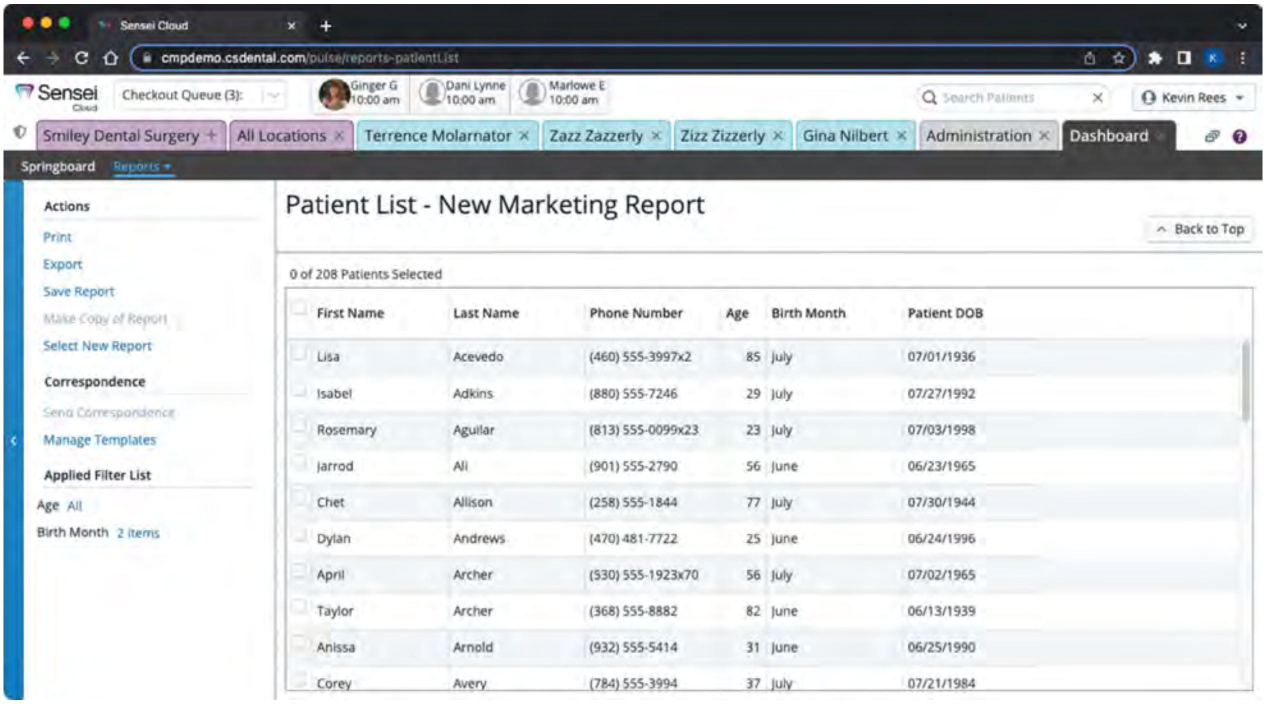
Enhancements to Patient List Reporting

The ‘Patient List’ custom reporting functionality has also been enhanced as part of this week’s Sensei Cloud update [Dashboard Tab > Reports > Patient List]. Based on your requests, we have added several new - and enhanced some existing - variables to the set of ‘Available Columns’ from which you can generate custom reports. These enhancements should provide our customers with more flexibility in the types of common, useful reports that can be generated.

Notably, this includes new ‘Patient DOB’ and ‘Birth Month’ variables, which enable you to generate your monthly ‘Happy Birthday’ lists to send out birthday wishes to your patient base. Along with the existing ‘Age’ variable, you can now generate a number of new types of custom reports, such as a list of patients, which fall within a certain age range and whose birthday falls next month, to target with a marketing campaign for specific goods or services. NOTE: ‘Patient DOB’ is simply a reporting variable (e.g., read-only) and cannot be used as a filter (TIP: use the existing ‘Age’ variable instead), while ‘Birth Month’ is a filterable variable permitting the selection of one or more month values.

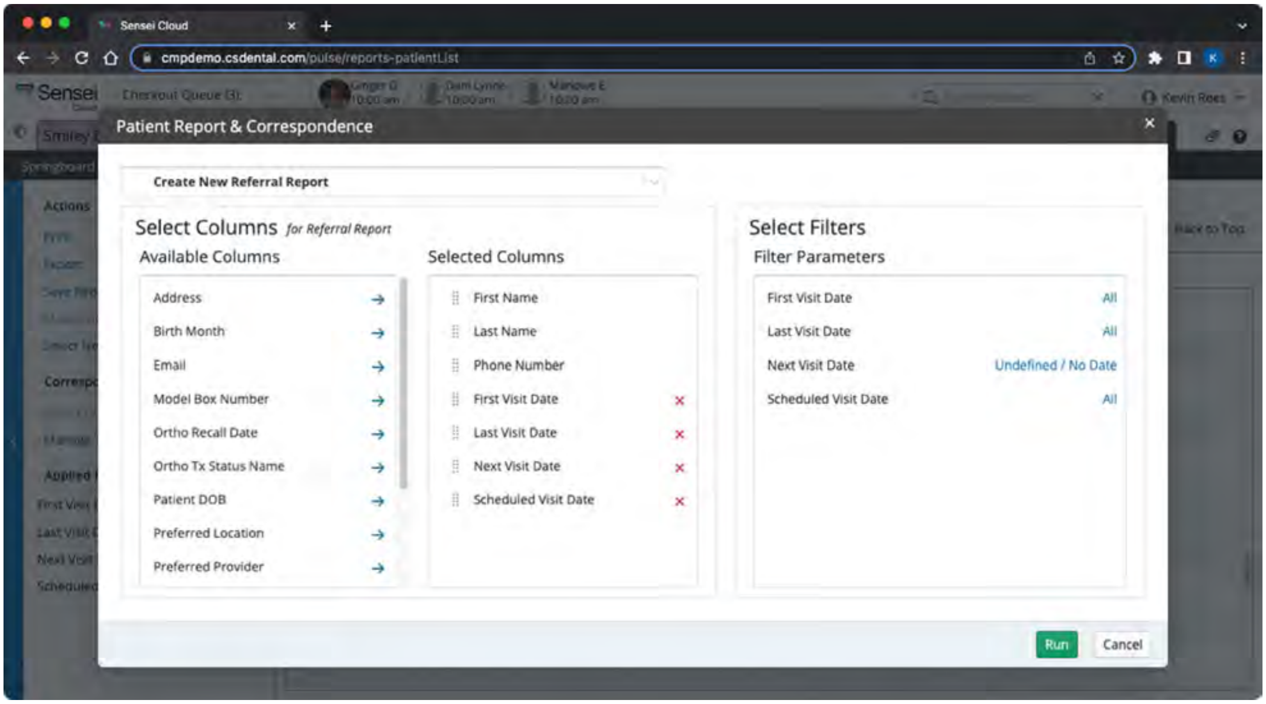

Sensei Cloud
cmpdemo.csdental.com/pulse/reports-patientList
Patient Report & Correspondence
Create New Marketing Report
Select Columns for Marketing Report
Available Columns
Last Visit Date
Model Box Number
Next Visit Date
Ortho Recall Date
Ortho Tx Status Name
Patient DOB
Preferred Location
Preferred Provider
Recare Status
Selected Columns
First Name
Last Name
Phone Number
Age
Birth Month
Select Filters
Filter Parameters
Age
All
Birth Month
All
Run
Cancel

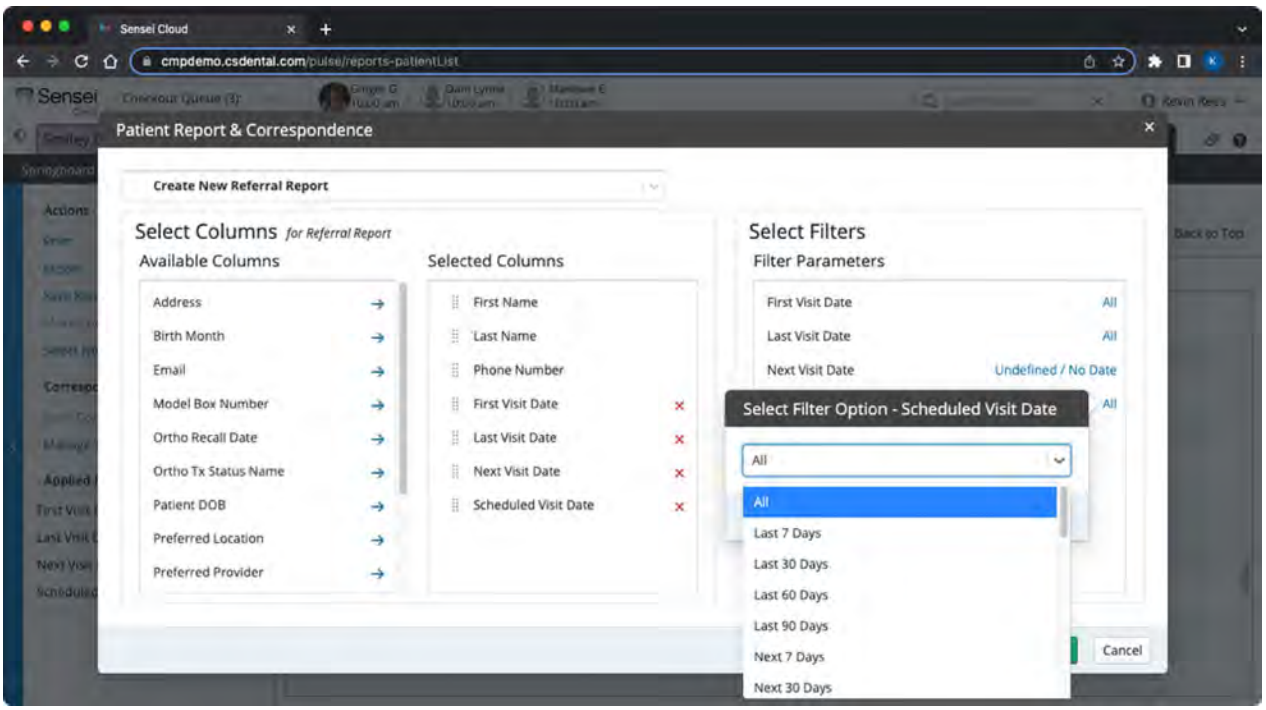

Sensei Cloud
cmpdemo.csdental.com/pulse/reports-patientList
Patient Report & Correspondence
Create New Marketing Report
Select Columns
Available Columns
Address
Email
Estimated Insurance
First Visit Date
Gender
Insurance Payer
Insurance Plan
Last 3D
Last Bitewing
Select Filter Values - Birth Month
2 of 12 items selected
Month Name
January
February
March
April
May
June
July
All
All
Save
Cancel
Cancel



The existing appointment-based variables (e.g., '{First/Next/Last} Visit Date') have been improved, tightening up the underlying logic so that resulting reports are more reliable and accurate. 'First Visit Date' is now calculated based on the patient's oldest known appointment with a status of at least 'Checked In' (e.g., 'Checked In', 'Seated', 'Completed', or 'Checked Out'). 'Last Visit Date' is based on the patient's most recent (past date) appointment also with at least a 'Checked In' status. Appointments that were canceled or never went beyond 'Scheduled' status do not count. 'Next Visit Date' is calculated based on the patient's nearest, future (or current) date appointment with a 'Scheduled' status. Past date appointments or current date appointments that have already been 'Checked In' do not count. You can specify a fixed date period (e.g., Last 90 Days, Next 30 Days, etc.), a custom date range, or a specific date to generate a list of patients whose first or last or next appointment occurred (or is scheduled to occur) on or within the specified dates.

In addition, a new 'Scheduled Visit Date' variable has been added, enabling you to generate reports of patients that have (or had) appointments that fall on a specific date (or within a specific date range). 'Scheduled Visit Date' includes any appointments that are scheduled to occur ('Scheduled') or have already occurred (e.g., 'Checked In', 'Seated', 'Completed', or 'Checked Out') on or within the specified dates. NOTE: It will display all applicable dates on which the patient has (or had) appointments that fall within the specified time period.


Sensei Cloud
cmpdemo.csdental.com/pulse/reports-patientList
Patient Report & Correspondence
Create New Referral Report
Select Columns for Referral Report
Available Columns
Address
Birth Month
Email
Model Box Number
Ortho Recall Date
Ortho Tx Status Name
Patient DOB
Preferred Location
Preferred Provider
Selected Columns
First Name
Last Name
Phone Number
First Visit Date
Last Visit Date
Next Visit Date
Scheduled Visit Date
Select Filters
Filter Parameters
First Visit Date All
Last Visit Date All
Next Visit Date Undefined / No Date
Scheduled Visit Date All
Run
Cancel


Sensei Cloud
cmpdemo.csdental.com/pulse/reports-patientList
Patient Report & Correspondence
Create New Referral Report
Select Columns for Referral Report
Available Columns
Address
Birth Month
Email
Model Box Number
Ortho Recall Date
Ortho Tx Status Name
Patient DOB
Preferred Location
Preferred Provider
Selected Columns
First Name
Last Name
Phone Number
First Visit Date
Last Visit Date
Next Visit Date
Scheduled Visit Date
Select Filters
Filter Parameters
First Visit Date All
Last Visit Date All
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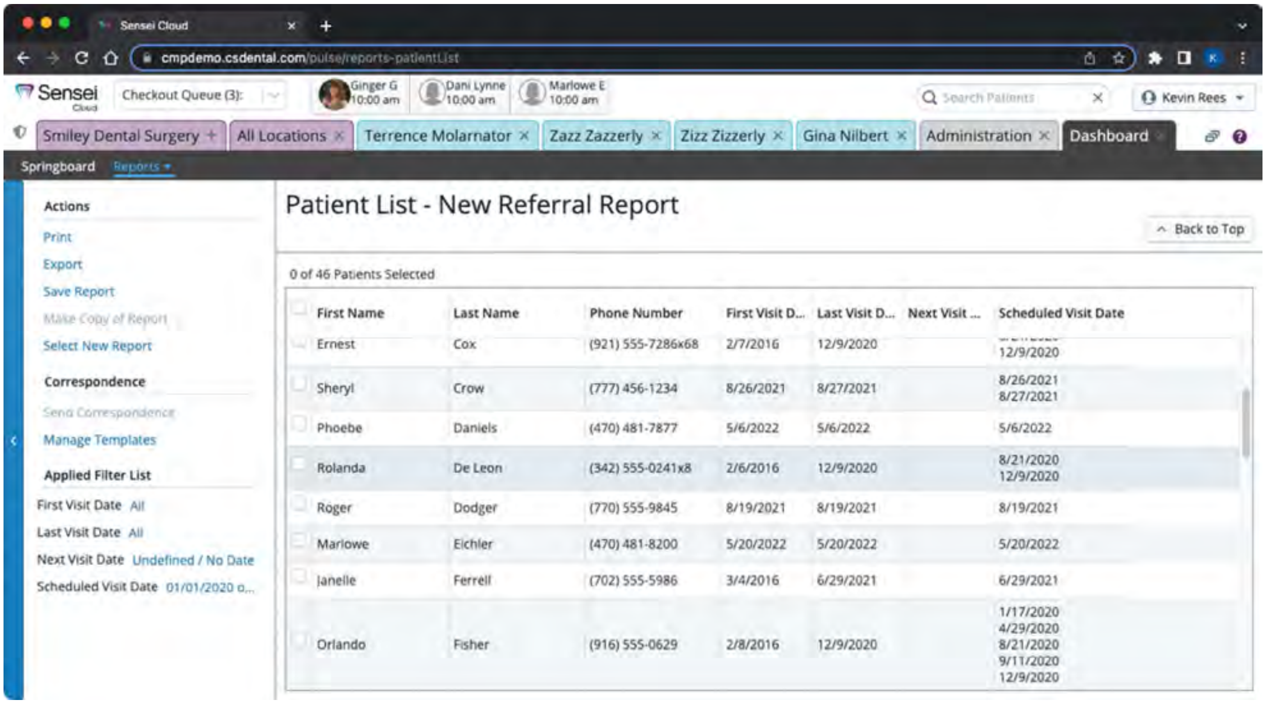
Last 30 Days
Last 60 Days
Last 90 Days
Next 7 Days
Next 30 Days
Cancel



We hope that these enhancements provide support for your reporting workflows, enabling you to generate more of the useful reports needed to operate your practice smoothly. We look forward to your feedback on what works well and what additional variables may be helpful in creating custom lists of patients.

[0.1.7739 RELEASE UPDATES CONTINUED ON PART 3]

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0 Kudos

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