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05-21-2022 11:15 PM

Sensei Cloud Release 0.1.7739 (Part 3)

# Sensei Cloud

Weekly Release

Build 0.1.7739 | May 22nd, 2022

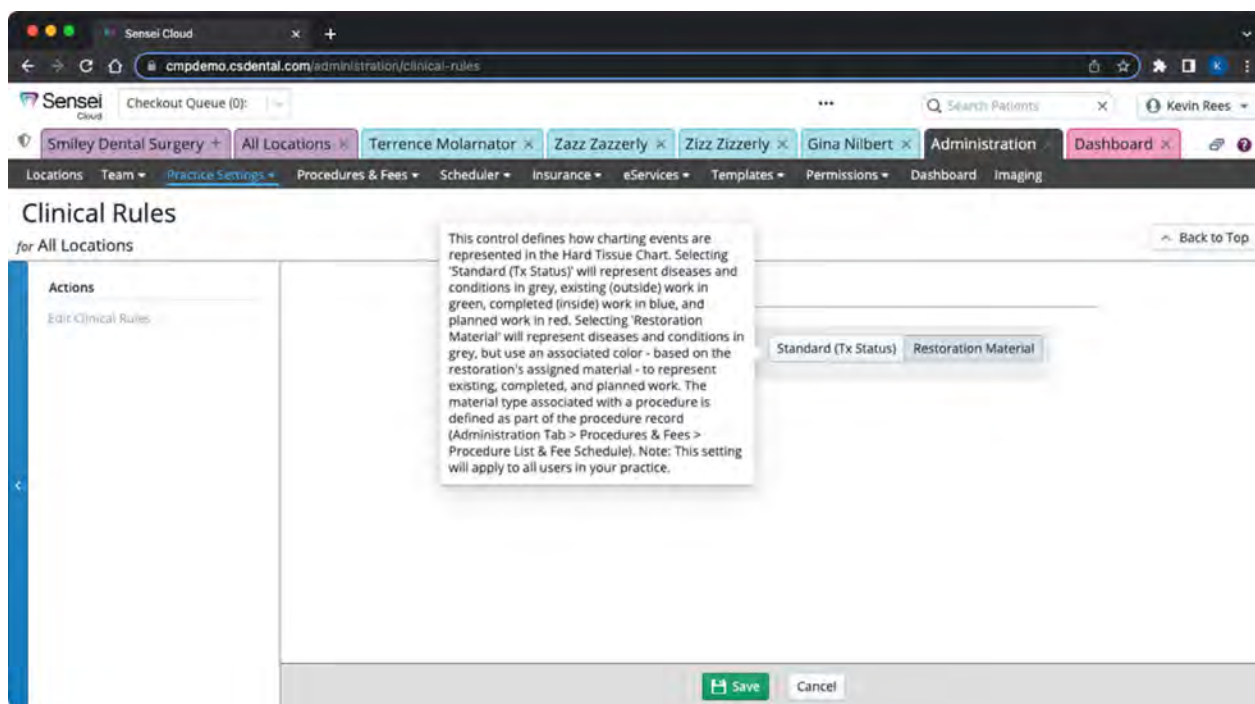
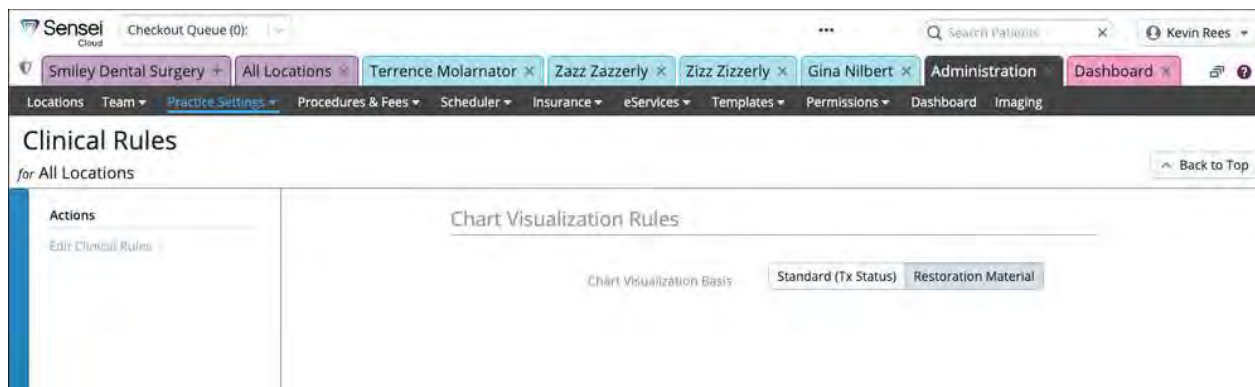
This week's Sensei Cloud updates continue to expand core application functionality and deliver on recent customer requests.

[0.1.7739 RELEASE UPDATES CONTINUED FROM PART 2]

## Choosing the Odontogram Color Palette

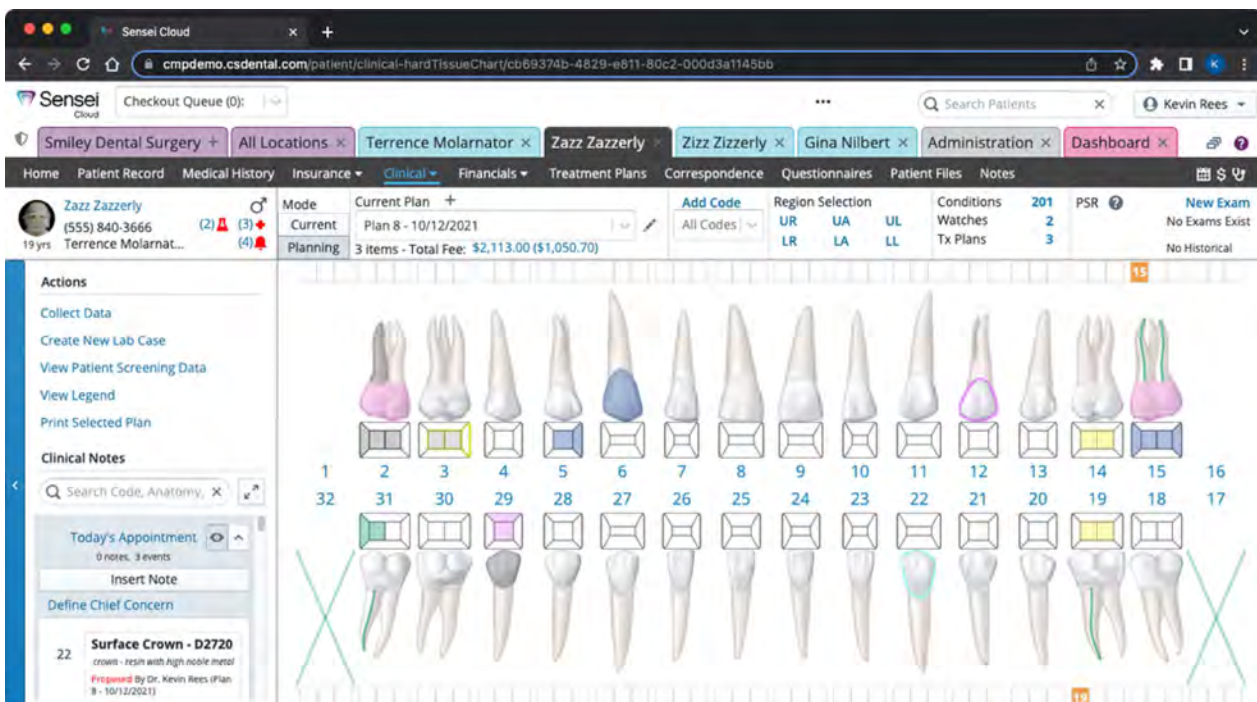
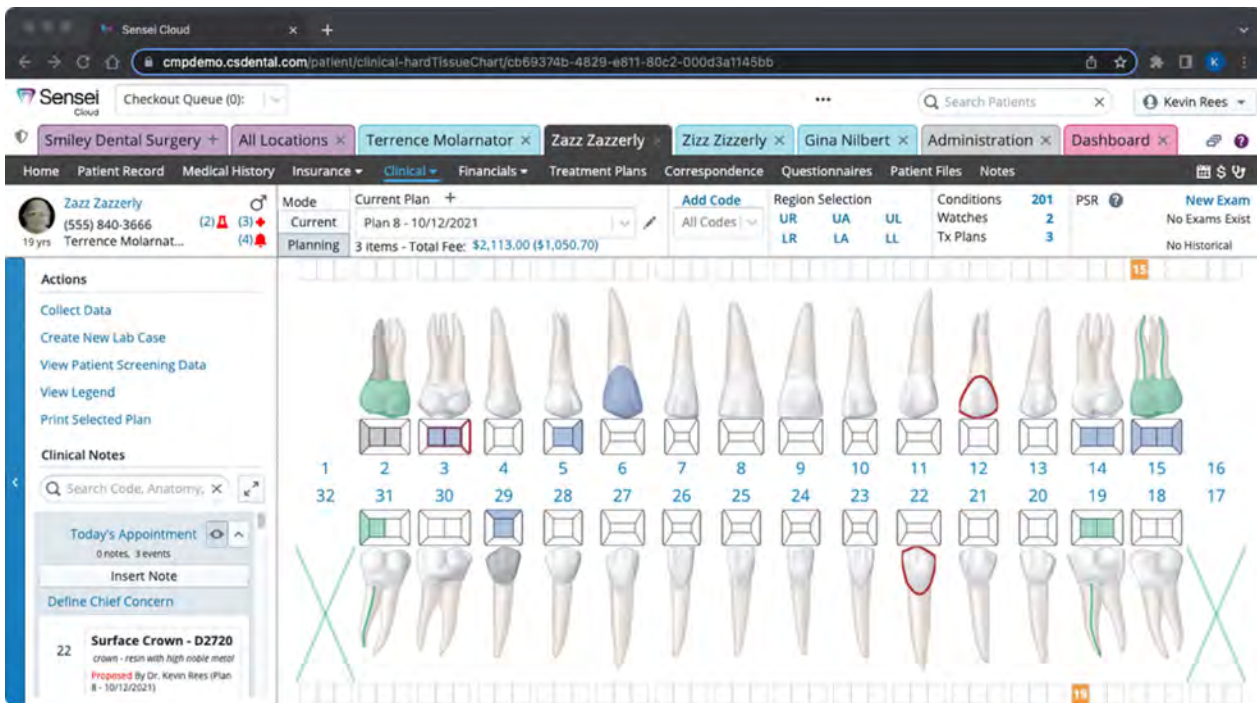
Based on customer feedback, you now have the ability to choose how charted events are visually represented on the patient's odontogram (e.g., Hard Tissue Chart). A new 'Chart Visualization Basis' setting has been added, which enables you to determine whether the color scheme, used to represent charted history

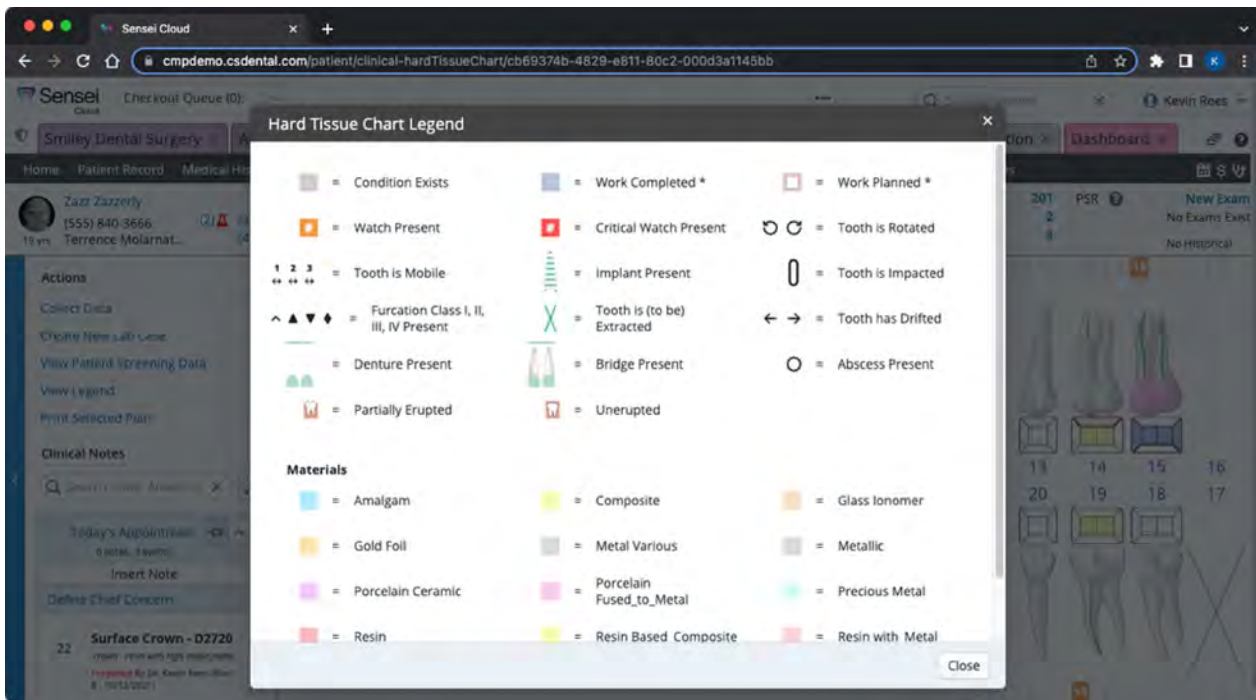
(and planning), is based on general status or associated restoration material [Administration Tab > Practice Settings > Clinical Rules]. NOTE: This setting applies to your entire practice, altering the color scheme used in all patient's Hard Tissue Charts for all of your team members. Based on a previous Sensei Cloud update, which introduced the material-based visualization of a patient's charting history, current customers are defaulted to the 'Restoration Material' option (but you now have the choice to change back).



Once applied, every patient's Hard Tissue Chart will be visualized using the selected scheme [Patient Tab > Clinical > Hard Tissue Chart]. The 'Standard (Tx Status)' option will visualize all applicable clinical events based on the nature of their status, conditions and issues in black / grey, existing work (e.g., outside work) in green, completed work (e.g., inside work) in blue, and planned work in red (outline). This may be more familiar to and preferred by former PracticeWorks and SoftDent users. The 'Restoration Material' option, on the

other hand, will show applicable clinical events based on their associated material. Under this scheme, recorded events are colored based on the material associated with the procedure code, with conditions and issues in black / gray, completed work (inside or outside work) in a colored fill, and planned work in a colored outline. This may be more familiar to and preferred by former R4 users. The material-to-color mapping can be reviewed in the chart's legend, available via the side panel. NOTE: Please refer to the release notes for 6534 (Part 2, from 07.13.2021) for more information on the visual representation of materials in the Hard Tissue Chart.





We hope that this enhancement provides our customers with more flexibility in how they prefer to view their patients' charted history. Please send us your feedback on what works well and what additional enhancements can support your clinical workflows.

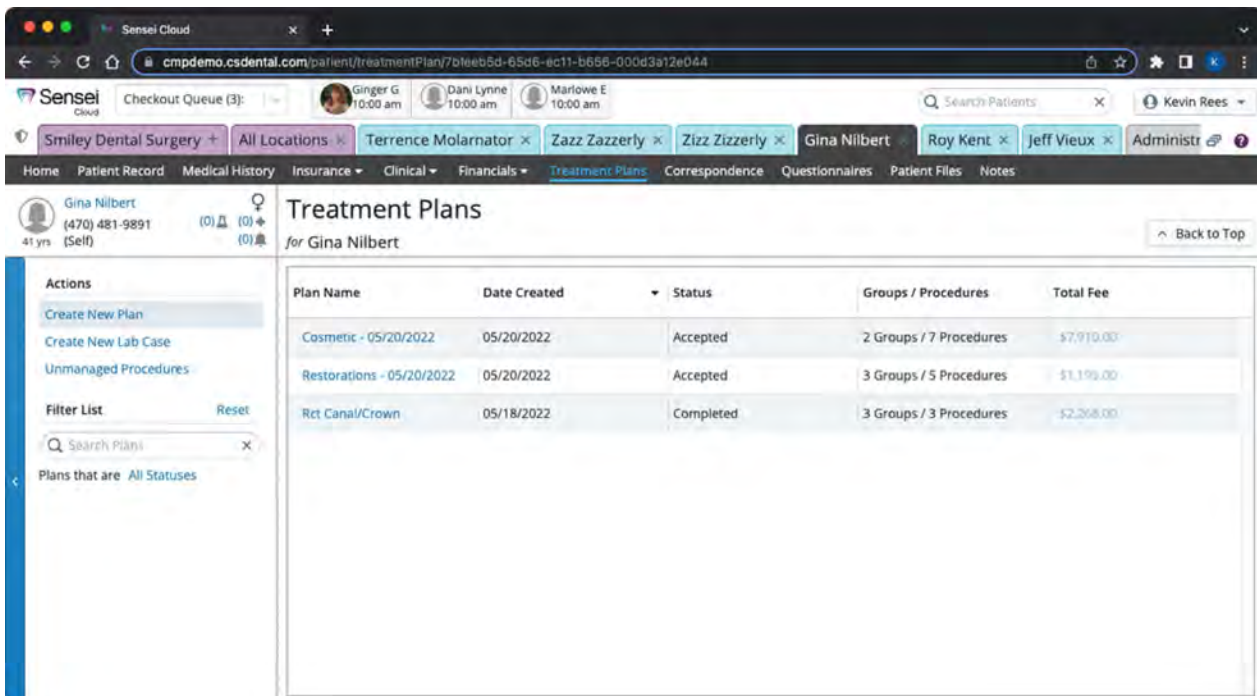
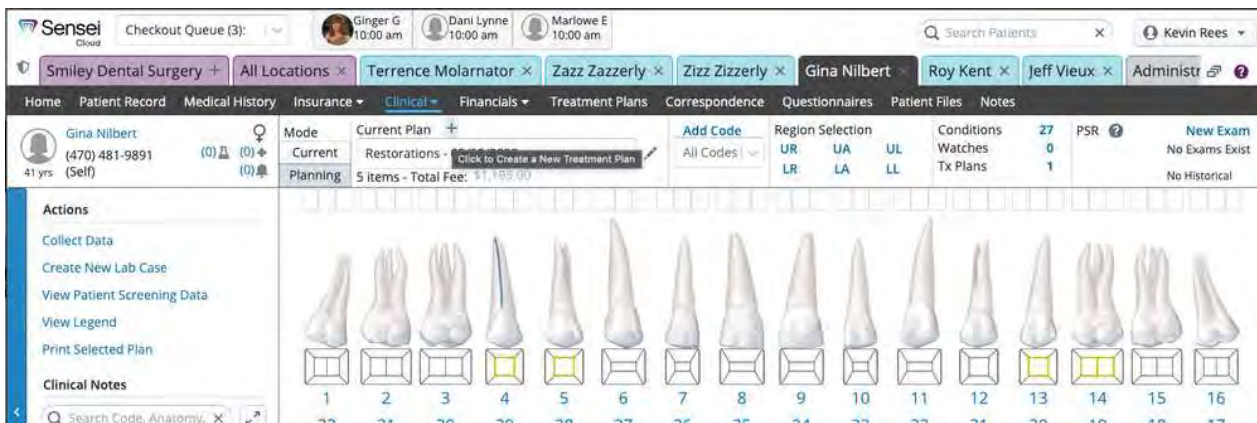
## 'Groups' Now Available in Treatment Plans

With this release, Sensei Cloud now provides additional flexibility when formulating treatment plans. In response to customer feedback, you now have the ability to create, order, and manage 'groups' when generating or editing a treatment plan [Patient Tab > Treatment Plan]. These enhancements give you some additional degrees of freedom when proposing, sequencing, presenting, and scheduling patient care.

The workflow for creating a new treatment plan remains largely unchanged, with direct paths from patient clinical contexts. Simply click the 'Create New Plan' action in the side panel of the patient's 'Treatment Plans' UI and then use the newly enhanced 'Manage Treatment Plan' dialog (discussed in more detail below) to create the plan [Patient Tab > Treatment Plans]. Alternately, click on the new '+' button when in 'Planning' mode of the Hard Tissue Chart, confirm or edit the default plan name, click OK, and then start using the charting tools to propose treatment (e.g., click 'Add Code' or select anatomy to chart against) [Patient Tab > Clinical > Hard Tissue Chart > {Planning}]. NOTE: Our NHS

customers in the UK have an extra step of determining if the treatment plan is 'Treatment Under the NHS' (or not), and selecting the relevant NHS course of treatment options, when creating treatment plans for NHS patients.

The process to edit or manage an existing treatment plan has not changed significantly either. Click on the target treatment plan from the list of the patient's Treatment Plans list to view it and then click the 'pencil' to edit the proposed treatment plan. From the Hard Tissue Chart (in 'Planning' mode), select the target treatment plan and then click the 'pencil' to further manage the proposed treatment. The major enhancements can be found in the patient's 'Treatment Plans' UI itself, the revised 'Managing Treatment Plan' dialog, and the supporting UI contexts in which patient treatment plans are displayed and used.



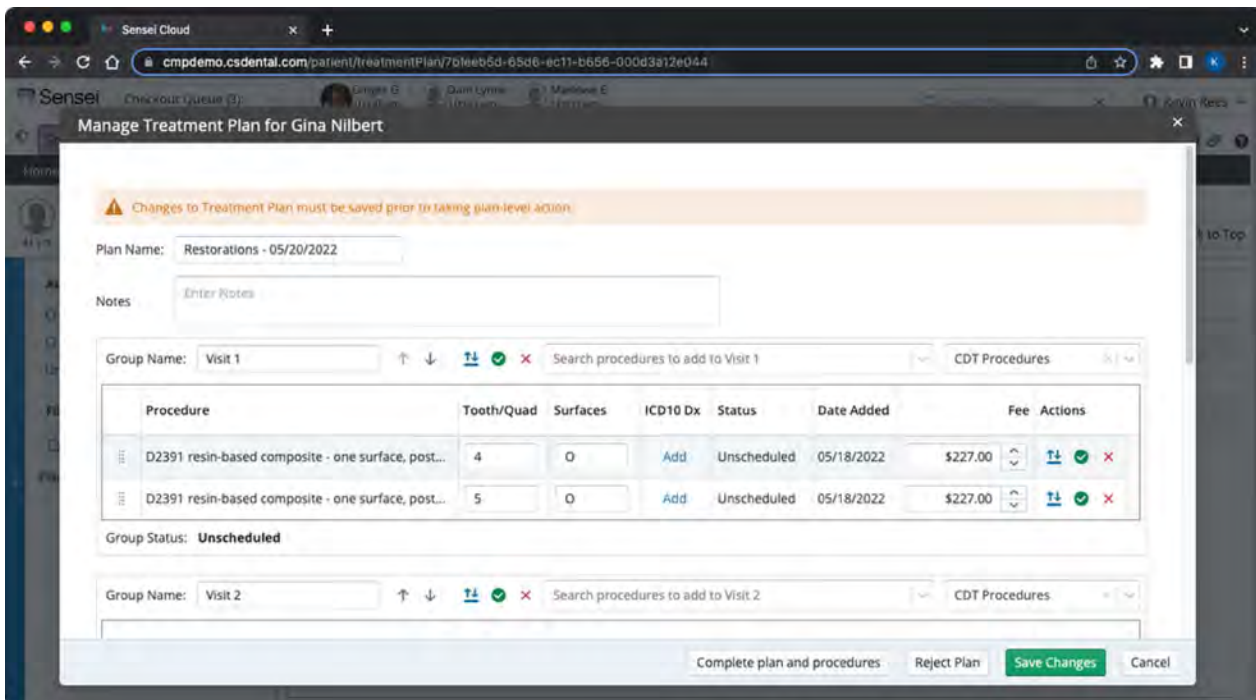
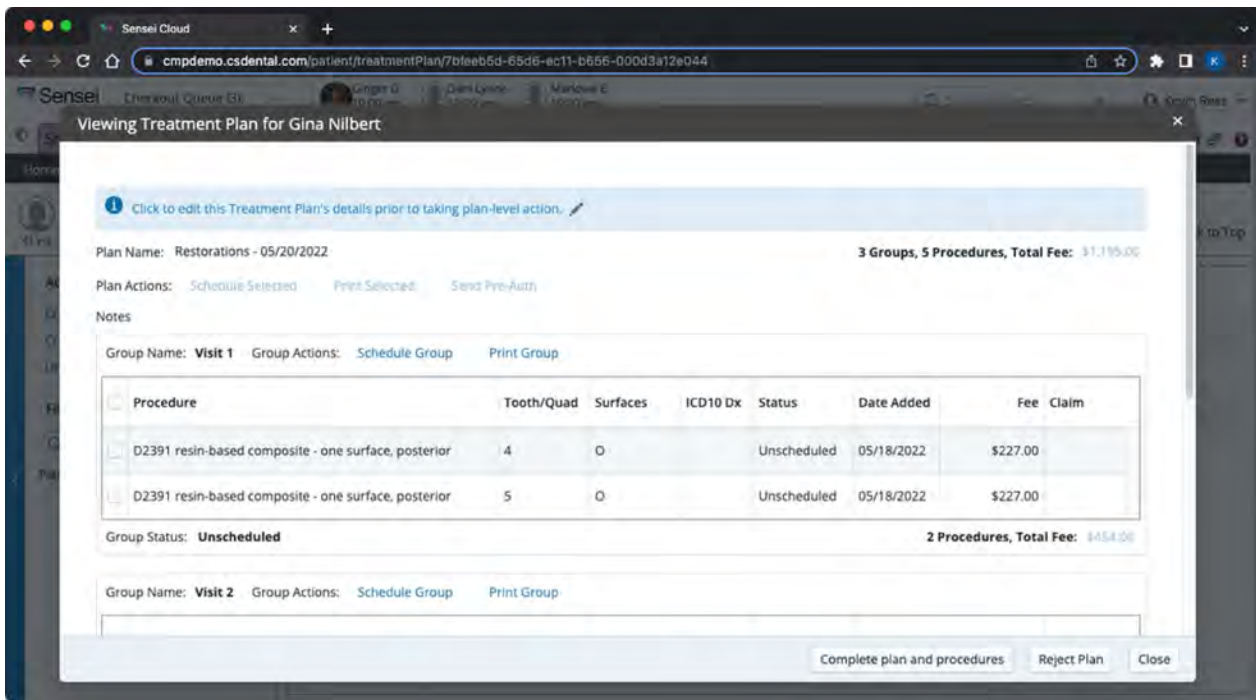
The 'Treatment Plan' UI has undergone significant changes to improve the overall usability of your treatment planning workflows [Patient Tab > Treatment Plans]. It now presents a list of the patient's existing treatment plans, providing better visibility into the status of all of a patient's proposed treatment. More importantly, the list of plans available for review and management now includes ones already completed or declined (rejected), which were previously inaccessible. Summary information is provided for each plan, including the plan name, its creation date, current (plan-level) status, basic content (in terms of groups and procedures), and its total fee. New filters are available in the side panel that enable you to filter the list by plan status (e.g., 'Proposed', 'Accepted', 'Completed', 'Declined', or 'FTR') or search by the plan name, included procedure code, or associated anatomy (e.g., tooth number). To review and/or manage a given plan, simply click on the 'Plan Name' link to access the new 'Viewing Treatment Plan' dialog. Click the 'pencil' to edit and further manage the selected plan. All of the treatment plan management and use functions are now managed via the '{Viewing / Manage} Treatment Plan' dialog rather than the 'Treatment Plans' UI itself.

The screenshot displays the 'Treatment Plans' interface for patient Gina Nilbert. The main table lists the following plans:

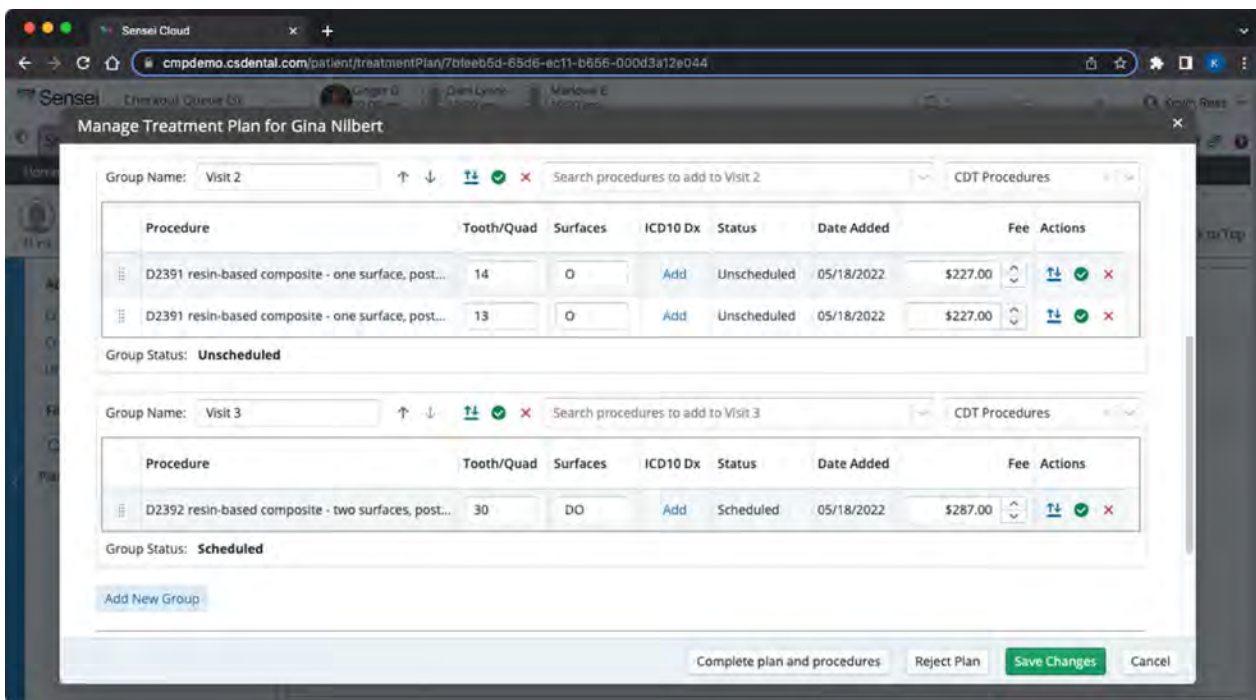
Plan Name	Date Created	Status	Groups / Procedures	Total Fee
Cosmetic - 05/20/2022	05/20/2022	Accepted	2 Groups / 7 Procedures	\$7,910.00
Restorations - 05/20/2022	05/20/2022	Accepted	3 Groups / 5 Procedures	\$1,199.00
		Completed	3 Groups / 3 Procedures	\$2,268.00

The 'Select Treatment Plan Statuses' dialog box is open, showing a dropdown menu with the following options:

- All Statuses
- Proposed
- Accepted
- Completed
- Declined

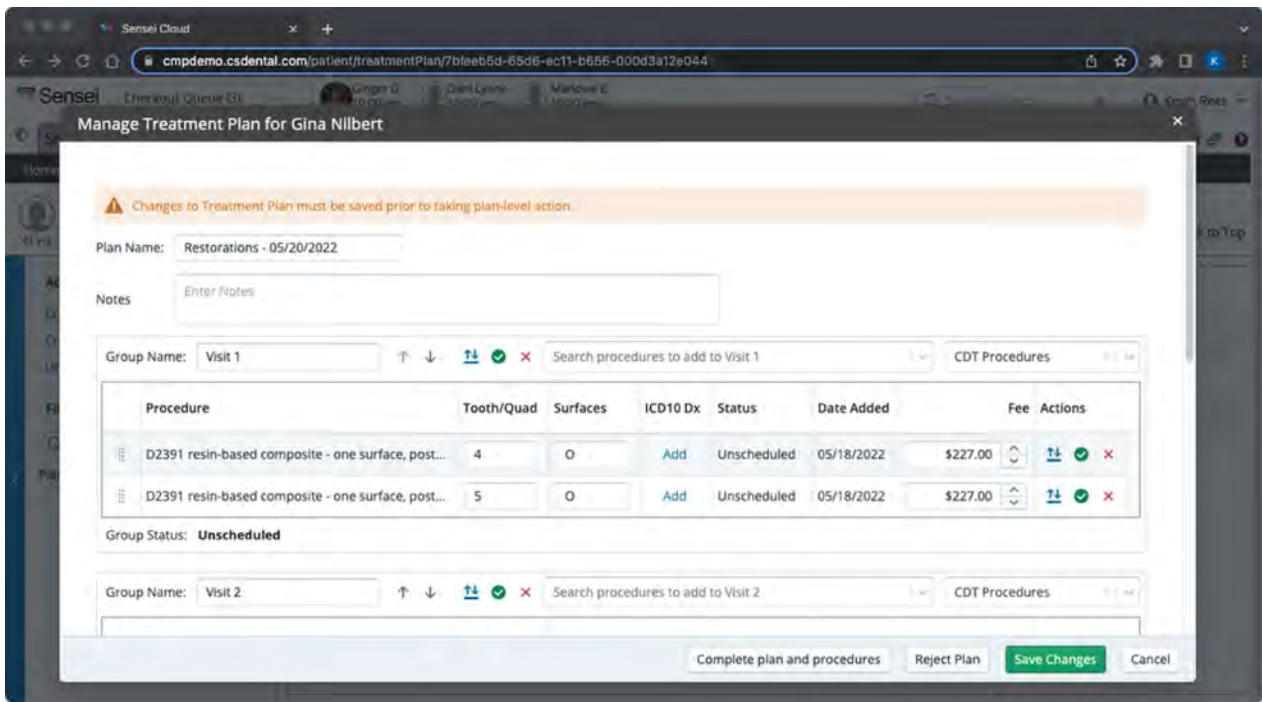


When creating or managing a treatment plan, you now have the ability to utilize 'groups' of planned procedures within the plan. Groups can be used to provide structure and sequence to a proposed course of treatment, enabling you to more efficiently communicate and schedule the plan. New treatment plans default to a single group and any procedures added to the treatment plan are automatically added to this group. Click the 'Add New Group' link to add an additional group to the plan. Groups receive a default name, but you can edit this to something more descriptive. Use the procedure search control to select and add procedures to a given group.

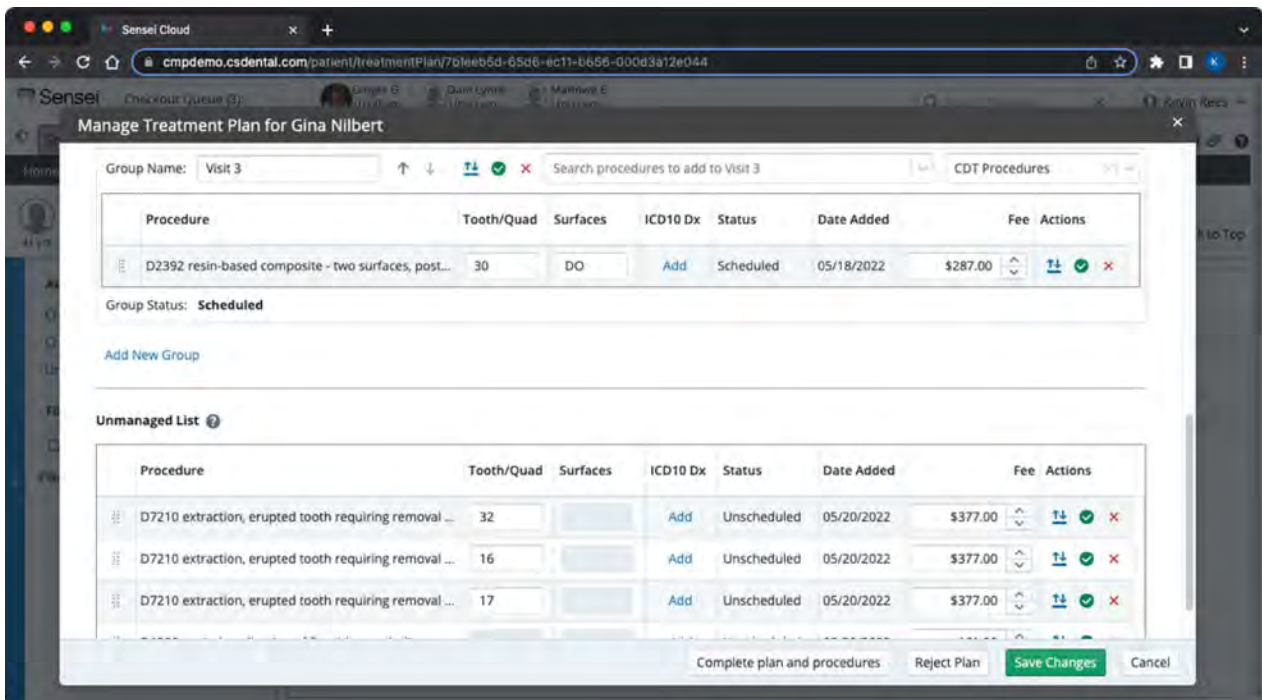


Once added, individual procedures can be dragged and dropped (using the 'drag handle') to reorder within the group. Procedures can quickly be moved between groups using the 'drag handle' or the 'Move' (e.g., 'dual arrows') action. Individual procedures can also be completed (using the green 'check' action) or removed (using the red 'X' action). The 'Uncomplete' (e.g., yellow 'circular arrow') can be used to undo the completion of procedures, as long as they are not tied to a completed appointment or have already been posted (as charges). NOTE: Completed procedures cannot be directly removed from the treatment plan, but can be moved to another group within the plan or moved to the 'Unmanaged (Procedures) List'. Similar actions can be performed to an entire group using the buttons next to the group name. The 'Move' (e.g., 'dual arrows') button relocates all of the procedures to a selected group. The 'Complete' (e.g., green 'check') completes (but does not post) all of the group's (uncompleted) procedures. The 'Remove' (e.g., red 'X') button allows you to determine whether to remove the procedures entirely (e.g., delete), move to another group, or move to the patient's 'Unmanaged (Procedures) List' (e.g., defer). Groups, themselves, can be reordered within the plan using the group's 'Reorder' (e.g., 'up arrow' and 'down arrow') buttons.

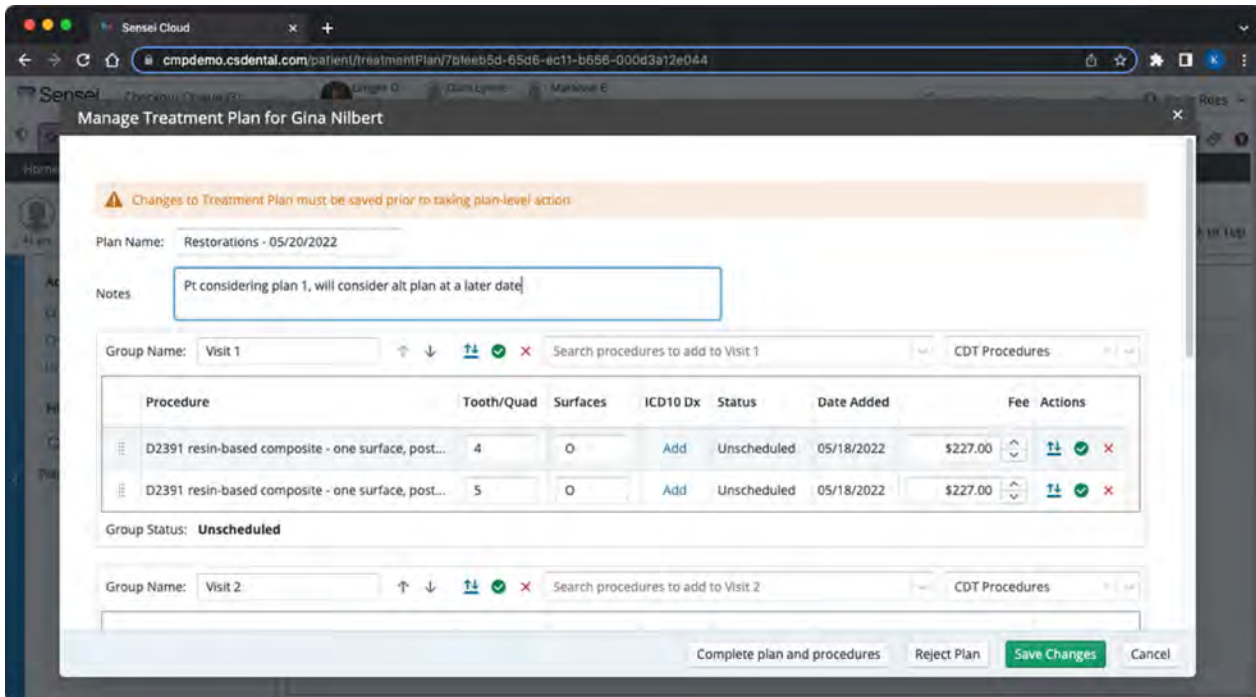




The patient's 'Unmanaged (Procedures) List' (e.g., the general planning bucket) is always available at the bottom when editing a treatment plan. Procedures can be added to the current plan from the 'Unmanaged List' items or can be deferred from the current plan (adding to the 'Unmanaged List' for later consideration). NOTE: NHS procedures from NHS courses of treatment cannot be deferred to the 'Unmanaged List', although private procedures from this list can be moved into the plan's treatment groups.



The new 'Notes' in the 'Manage Treatment Plan' dialog (edit mode) are only associated with the plan and intended to help facilitate internal communication and record keeping. These notes are neither propagated to the patient's clinical event note history, nor are they included when the treatment plan is printed. NOTE: All of these functions occur when editing the treatment plan, either when directly creating a new treatment plan or editing an existing treatment plan (e.g., via the 'Manage Treatment Plan' dialog). As will be discussed, the available actions vary slightly when reviewing a plan versus editing it.



Finally, when saving your changes, you are prompted to automatically remove any empty groups within the current treatment plan. NOTE: Empty groups are automatically removed from NHS courses of treatment, without requiring a prompt.

It should be noted that the 'Unmanaged (Procedures) List' is now maintained separately, distinguishing it from proper treatment plans. It can still be used to track and manage informally proposed treatment and/or manage deferred work that was originally scheduled, but then declined. NOTE: Only applies to non-NHS (private) work in the UK. Click on the 'Unmanaged Procedures' action in the side panel of the 'Treatment Plans' UI to access this list of 'proposed' treatments. You can still use this mechanism for informal treatment planning, but the more robust, group-based sequencing of treatment is not available. You can use the existing controls to send pre-authorization claims (US only), schedule or print

the proposed work. To see treatment already completed, which were not specifically added to a treatment plan, check the 'Show Past Completed Procedures' option in the footer of the 'Edit Unmanaged Procedures' dialog. This includes any procedures added specifically to the 'Unmanaged Procedures' list, deferred to the list from a treatment plan, or directly added to an appointment. Click the 'pencil' to edit the list and add new proposed treatments, complete procedures, or remove them from the list. The list can be sequenced via drag-and-drop using the available 'drag handles'.

**Treatment Plans**  
for Jeff Vieux

Plan Name	Date Created	Status	Groups / Procedures	Total Fee
Plan 2 - 05/13/2022	05/13/2022	Declined	4 Groups / 6 Procedures	\$1,444.00 (\$1,163.20)
Plan 3 - 05/18/2022	05/18/2022	Accepted	4 Groups / 5 Procedures	\$584.00 (\$539.00)
Plan 4 - 05/18/2022	05/18/2022	Accepted	3 Groups / 3 Procedures	\$433.00 (\$388.00)
Plan 5 - 05/19/2022	05/19/2022	Declined	2 Groups / 2 Procedures	\$330.00 (\$300.00)
Plan 6 - 05/19/2022	05/19/2022	Declined	1 Group / 2 Procedures	\$254.55 (\$224.55)
Partial Denture	03/03/2020	Declined	1 Group / 1 Procedure	\$1,120.00 (\$1,120.00)

**Edit Unmanaged Procedures**

Click to edit Unmanaged Procedures' details.

Actions: Schedule Selected | Print Selected | Send Pre-Auth | **5 Procedures, Total Fee: \$2,160.00 (\$1,738.80)**

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Claim
<input type="checkbox"/> D0120 periodic oral evaluation - established patient				Scheduled	06/04/2020	\$65.00	
<input type="checkbox"/> D2750 crown - porcelain fused to high noble metal	19			Scheduled	03/31/2020	\$1,254.00	
<input type="checkbox"/> D2950 core buildup, including any pins when required	19			Scheduled	03/31/2020	\$327.00	
<input type="checkbox"/> D2140 amalgam - one surface, primary or permanent	3	0		Scheduled	05/13/2022	\$187.00	
<input type="checkbox"/> D2161 amalgam - four or more surfaces, primary or perman...	15	MODL		Scheduled	05/13/2022	\$327.00	

Show Past Completed Procedures | Close

We hope that these enhancements provide the requested flexibility with presenting and delivering proposed patient care. Please send us feedback on what works well and what additional improvements could be made to further support your treatment planning workflows.

## [0.1.7739 RELEASE UPDATES CONTINUED ON PART 4]

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