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The Exchange > Sensei Cloud > SENSEI CLOUD > Sensei Cloud Release 0.1.7739 (Part 4)



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05-21-2022 11:14 PM

Sensei Cloud Release 0.1.7739 (Part 4)

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 3]

Updates to Managing and Using Treatment Plans

As discussed, this Sensei Cloud release includes significant updates to the existing treatment planning functionality, to accommodate the use of 'groups' to organize the proposed treatment and address several workflow detractors that we have heard from our customers. The functions for managing an existing treatment plan are divided between two modes of the 'Treatment Plan' dialog - 'Viewing' and 'Managing' (e.g., editing).

The initial 'Viewing Treatment Plan' mode is displayed whenever opening an existing plan and is used for general review, plan-level management (such as completing or rejecting the plan), printing out the treatment plan, or scheduling proposed work. Moving these actions into the 'Viewing Treatment Plan' dialog now enables you to perform some of these functions (such as scheduling and printing) from new contexts, including the Hard Tissue Chart (when in 'Planning' mode). In 'view mode', you can also see key summary information about the treatment plan, including:

- The current group and procedure count, as well as the total fee. For US treatment plans, this includes estimation details (for patients with insurance). For UK NHS courses of treatment, this includes the associated charge band, UDA credit, and NHS versus private fee subtotals. NOTE: NHS course of treatment calculations are not updated until all plan updates are saved.
- A group-by-group breakdown of the proposed work, including each procedure, its details, and current status.
- The group-based summary including the procedure count, total fee, and the current group status. NOTE: Group status is 'Unscheduled' if all group procedures are unscheduled, 'Scheduled' if all group procedures are scheduled, 'Pending' if all group procedures are pending, 'Completed' if all group procedures are already completed, 'In Progress' if the group procedures are in mixed states, or 'Declined' once the treatment plan has been rejected.

Sensei Cloud

cmpdemo.csdenal.com/patient/treatmentPlan/6c85b85a-475d-ea11-a94c-000d3a102cd5

Viewing Treatment Plan for Jeff Vieux

Click to edit this Treatment Plan's details prior to taking plan-level action.

Plan Name: Plan 3 - 05/18/2022 **4 Groups, 5 Procedures, Total Fee: \$584.00 (\$539.00)**

Plan Actions: [Schedule Selected](#) [Print Selected](#) [Send Pre-Auth](#) [Post Charges \(2\) for \\$245.00](#)

Notes

Group Name: **Group 1** Group Actions: [Schedule Group](#) [Print Group](#)

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Claim
<input type="checkbox"/> D0277 vertical bitewings - 7 to 8 radiographic images				Unscheduled	05/18/2022	\$70.00	

Group Status: **Unscheduled** **1 Procedure, Total Fee: \$70.00 (\$55.00)**

Group Name: **Group 2** Group Actions: [Schedule Group](#) [Print Group](#)

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Claim
<input type="checkbox"/>							

[Complete plan and procedures](#) [Reject Plan](#) [Close](#)

Sensei Cloud

phx4-dpms-app-demo.azurewebsites.net/patient/treatmentPlan/b0f21ca3-c8b4-ec11-9974-e019c53e11a6

Viewing Treatment Plan for Jones Kelly

Click to edit this Treatment Plan's details prior to taking plan-level action.

Plan Name: Plan 13 - 20/05/2022 **NHS** **Charge Band 2: 3 UDAs, 2 Groups, 3 Procedures, NHS: £0.00, PRV: £0.00, Total Fee: £0.00**

Plan Actions: [Schedule Selected](#) [Print Plan](#) [Print Plan](#)

Notes

Group Name: **Group 1** Group Actions: [Schedule Group](#)

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee
<input type="checkbox"/> 1001 Scale/Polish			Unscheduled	20/05/2022	Charge Band 1
<input type="checkbox"/> 101 Exam/Report			Unscheduled	20/05/2022	Charge Band 1

Group Status: **Unscheduled** **2 Procedures, PRV Subtotal: £0.00**

Group Name: **Group 2** Group Actions: [Schedule Group](#)

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee
<input type="checkbox"/>					

[Complete plan and procedures](#) [Abort NHS Plans through Fusion](#) [Close](#)

You can also perform management actions for any selected procedures or a specific group, such as scheduling the proposed treatment or printing out a treatment plan for review and acceptance. NOTE: The 'Schedule Selected' or 'Schedule Group' controls are only available when the associated procedures are 'Unscheduled'. Clicking on a 'Schedule' action creates a new appointment for the patient and automatically adds the selected procedures from the treatment plan. The 'Print Selected' and 'Print Group' controls are always available, even when the treatment plan has already been completed or rejected. The revised treatment plan document (printout) now includes the group-based structure and

details, including the group name, status, and subtotal as well as the standard procedure-based details for any selected procedures from each group. NOTE: For NHS courses of treatment, the entire plan must be printed in its totality, as an accurate reflection of the associated band charge and NHS fee cannot be determined from individual procedures or a single group.

Viewing Treatment Plan for Gina Nilbert

Plan Name: Restorations - 05/20/2022 3 Groups, 5 Procedures, Total Fee: \$1,785.00

Plan Actions: [Schedule Selected](#) [Print Selected](#) [Send Pre-Author](#)

Notes

Group Name: **Visit 1** Group Actions: [Schedule Group](#) [Print Group](#)

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Claim
D2391 resin-based composite - one surface, posterior	4	0		Unscheduled	05/18/2022	\$227.00	
D2391 resin-based composite - one surface, posterior	5	0		Unscheduled	05/18/2022	\$227.00	

Group Status: **Unscheduled** 2 Procedures, Total Fee: \$454.00

Group Name: **Visit 2** Group Actions: [Schedule Group](#) [Print Group](#)

[Complete plan and procedures](#) [Reject Plan](#) [Close](#)

Appointment for Gina Nilbert at Smiley Dental Surgery

Gina Nilbert (470) 481-9891 (Self) 41 yrs

Medical Alerts (0) No Patient Medical Alerts

Search procedures from CDT Procedures CDT Procedures

Code	Description	Tooth/Quad	Surface(s)	Amount
D2391	resin-based composite - one surface, posterior	4	0	\$227.00
D2391	resin-based composite - one surface, posterior	5	0	\$227.00
Total				\$454.00

Total Due (Pt Due) \$454.00

Appointment Info

Unscheduled | Checked In | Seated | Completed | Cancelled

Teledentistry:

Location: Smiley Dental Surgery

Appt Type: Search

Pt Follow-Up: Yes No

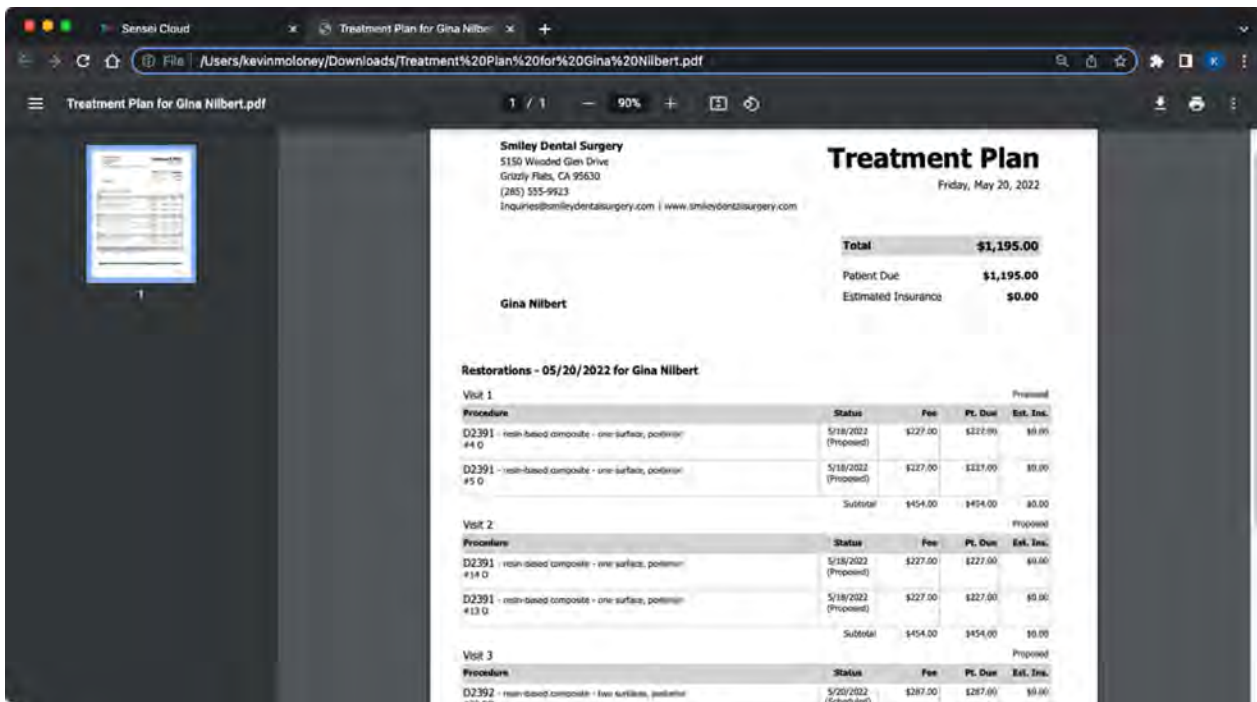
Confirmed: Yes No

Put on Shortcall: No AM Only PM Only Anytime

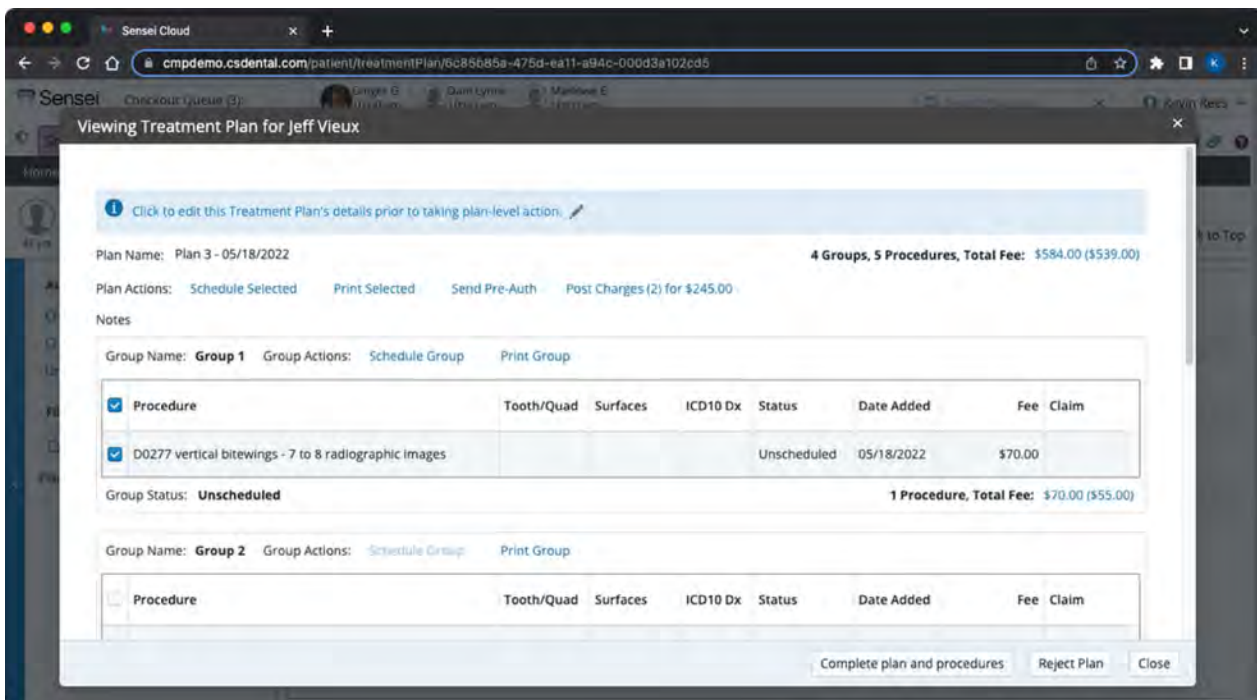
Duration: 30 Minutes

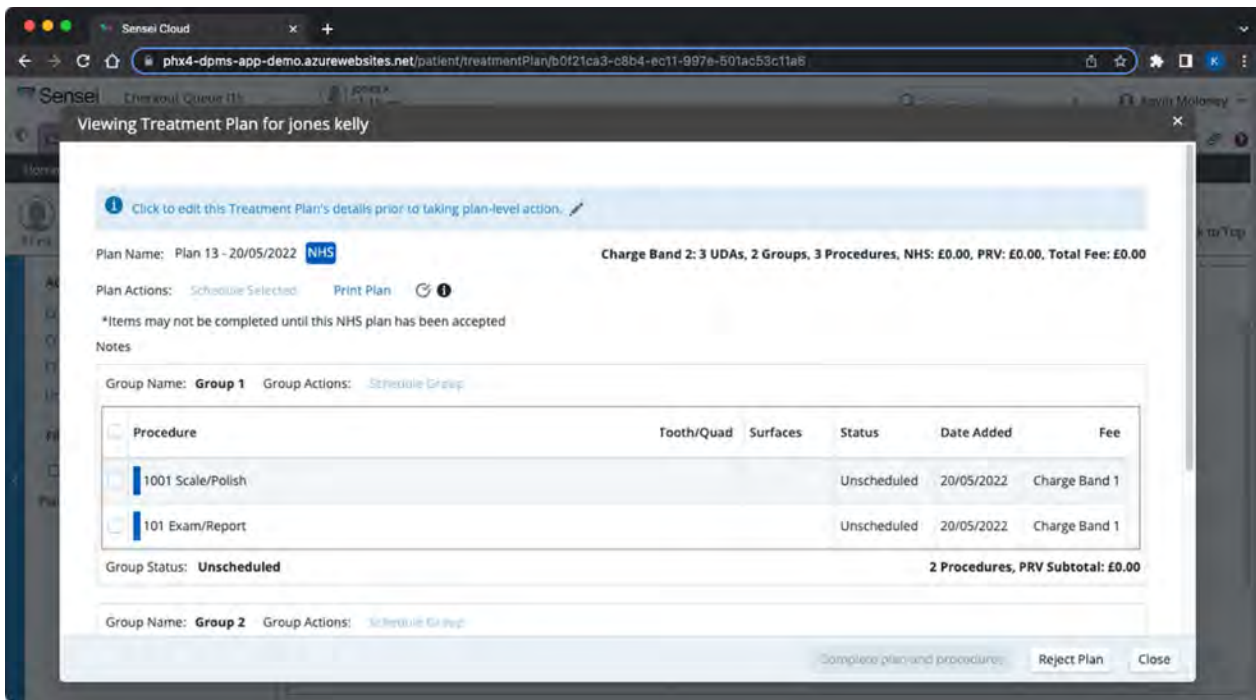
Doctor: Dr. Jason Parker

[Schedule Appointment](#) [Save Appointment](#) [Cancel](#)



When US patients have insurance coverage, you can generate and submit a pre-authorization claim for all or some of the plan's procedures. For UK NHS courses of treatment, users can accept the plan and generate the claim, view the generated claim, and delete or 'FTR' the plan using the existing controls. For all treatment plans, you can post any completed procedures by clicking the 'Post Charges' action. You are prompted with the 'Post New Charges' dialog to provide you with an option to add any additional charges, make any modifications, and define additional service details prior to posting.





As previously discussed, clicking the 'pencil' to edit the plan displays the 'Manage Treatment Plan' dialog. This provides access to all of the aforementioned controls to modify the proposed treatment, complete or defer / remove procedures, reorganize the course of treatment, enter plan notes, and plan-level management (such as completing or rejecting the plan).

Once created, you have the option to 'Complete plan and procedures' or to 'Reject Plan' whenever editing (or viewing) an existing treatment plan. Clicking 'Complete plan and procedures' automatically marks all of the unscheduled, scheduled, or pending procedures as 'Completed' and marks the overall plan as 'Completed'. If the patient does not have a scheduled appointment on the current date, then you are prompted to define the service details (e.g., the associated location, provider, and service date) for the procedures being completed. Clicking 'Reject Plan' automatically marks all of the unscheduled, scheduled, or pending procedures as 'Declined' and marks the overall plan as 'Declined'. You are prompted as to how Sensei Cloud should handle any of the plan that is already completed or is 'in-flight' (e.g., 'Scheduled' or 'Pending'). 'Completed' procedures remain intact in the plan record, while the remaining procedures are marked as 'Declined' and maintained in the plan record. However, existing appointments (scheduled or pending) remain intact. The procedures, in their associated states (e.g., 'Scheduled' or 'Pending'), are added to the patient's 'Unmanaged (Procedures) List'.

Sensei Cloud

cmpdemo.cs dental.com/patient/treatmentPlan/6c85b85a-475d-ea11-a94c-000d3a102cd5

Manage Treatment Plan for Jeff Vieux

⚠ Changes to Treatment Plan must be saved prior to taking plan-level action.

Plan Name: Plan 3 - 05/18/2022

Notes: Enter Notes

Group Name: Group 1

Search procedures to add to Group 1

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Actions
D0277 vertical bitewings - 7 to 8 radiographic ima...			Add	Unscheduled	05/18/2022	\$70.00	⬆ ⬇ ⬆

Group Status: **Unscheduled**

Group Name: Group 2

Search procedures to add to Group 2

Complete plan and procedures | Reject Plan | **Save Changes** | Cancel

Sensei Cloud

cmpdemo.cs dental.com/patient/treatmentPlan/6c85b85a-475d-ea11-a94c-000d3a102cd5

Manage Treatment Plan for Jeff Vieux

⚠ Changes to Treatment Plan must be saved prior to taking plan-level action.

Plan Name: Plan 3 - 05/18/2022

Notes: Enter Notes

Group Name: Group 1

Search procedures to add to Group 1

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Date Added	Fee	Actions
D0277 vertical bitewings - 7 to 8 radiographi						\$70.00	⬆ ⬇ ⬆

Group Status: **Unscheduled**

Group Name: Group 2

Search procedures to add to Group 2

Complete plan and procedures | Reject Plan | **Save Changes** | Cancel

Define Service Details

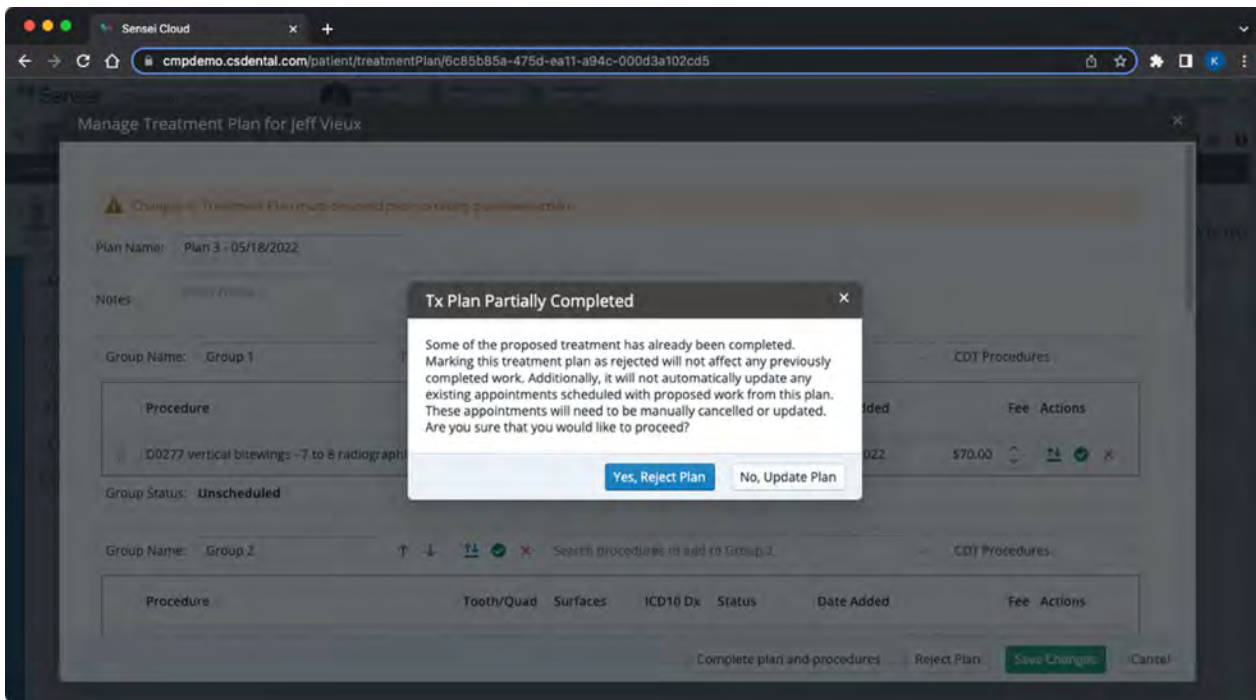
This patient does not currently have an appointment booked today. Choose the location at and date of service on which these procedures were completed.

Location: Smiley Dental Surgery

Provider: Dr. Kevin Rees

Service Date: Today (05/20/2022)

Save | **Cancel**



NOTE: The treatment plan management rules discussed above are slightly different for our UK customers, especially when handling NHS courses of treatment. Once created, an NHS course of treatment must first be marked as accepted before it can be further managed (e.g., scheduled or completed). This still occurs using the 'Accept Plan' button (e.g., 'circle with check') available in the 'Viewing Treatment Plan' dialog (once the initial plan is saved) or via the banner in the Hard Tissue Chart (in 'Planning' mode). As only one active ('Accepted') NHS course of treatment is allowed at any given time, all other open ('Proposed') NHS courses are automatically marked as 'Declined'. Once the plan is accepted (and NHS claim record generated), proposed treatment can be scheduled and completed as normal. To 'delete' (decline) an NHS course (which has no completed work) or mark the course 'Failed to Return' (if it is partially completed), click on the 'i' button in the 'Viewing Treatment Plan' dialog. As with US and UK private treatment plans, scheduled or pending appointments associated with treatment plan procedures are maintained even after the NHS course is declined or discontinued (e.g., FTR) and need to be manually cleaned up. However, any associated NHS procedures are stripped from the appointments (NHS work cannot be scheduled without an accepted course of treatment).

Sensei Cloud

phx4-dpms-app-demo.azurewebsites.net/patient/treatmentPlan/b0f21ca3-c8b4-ec11-997e-501ac53c11a6

Manage Treatment Plan for Jones Kelly

Changes to Treatment Plan must be saved prior to taking plan-level action.

Plan Name: Plan 15 - 20/05/2022 **NHS** Charge Band 3: 12 UDAs, 1 Group, 2 Procedures, NHS: £0.00, PRV: £0.00, Total Fee: £0.00

Notes: Enter Notes

Group Name: Group 1 Search procedures to add to Group 1 NHS

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee	Actions
111 Extensive Exam			Unscheduled	20/05/2022	Charge Band 1	📄 🟢 ⚙️ ✖️
1726 Crown - Synthetic Resin	URS		Unscheduled	20/05/2022	Charge Band 3	📄 🟢 ⚙️ ✖️

Group Status: **Unscheduled**

Add New Group

Unmanaged List

Complete plan and procedures | About NHS Plans through 'i' icon | **Save Changes** | Cancel

Sensei Cloud

phx4-dpms-app-demo.azurewebsites.net/patient/treatmentPlan/b0f21ca3-c8b4-ec11-997e-501ac53c11a6

Manage Treatment Plan for Jones Kelly

Changes to Treatment Plan must be saved prior to taking plan-level action.

Plan Name: Plan 15 - 20/05/2022 **NHS** Charge Band 3: 12 UDAs, 1 Group, 2 Procedures, NHS: £0.00, PRV: £0.00, Total Fee: £0.00

Notes: Enter Notes

Group Name: Group 1 Search procedures to add to Group 1 NHS

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee	Actions
111 Extensive Exam			Unscheduled	20/05/2022	Charge Band 1	📄 🟢 ⚙️ ✖️
1726 Crown - Synthetic Resin	URS		Unscheduled	20/05/2022	Charge Band 3	📄 🟢 ⚙️ ✖️

Group Status: **Unscheduled**

Add New Group

Unmanaged List

Complete plan and procedures | About NHS Plans through 'i' icon | **Save Changes** | Cancel

Define Service Details

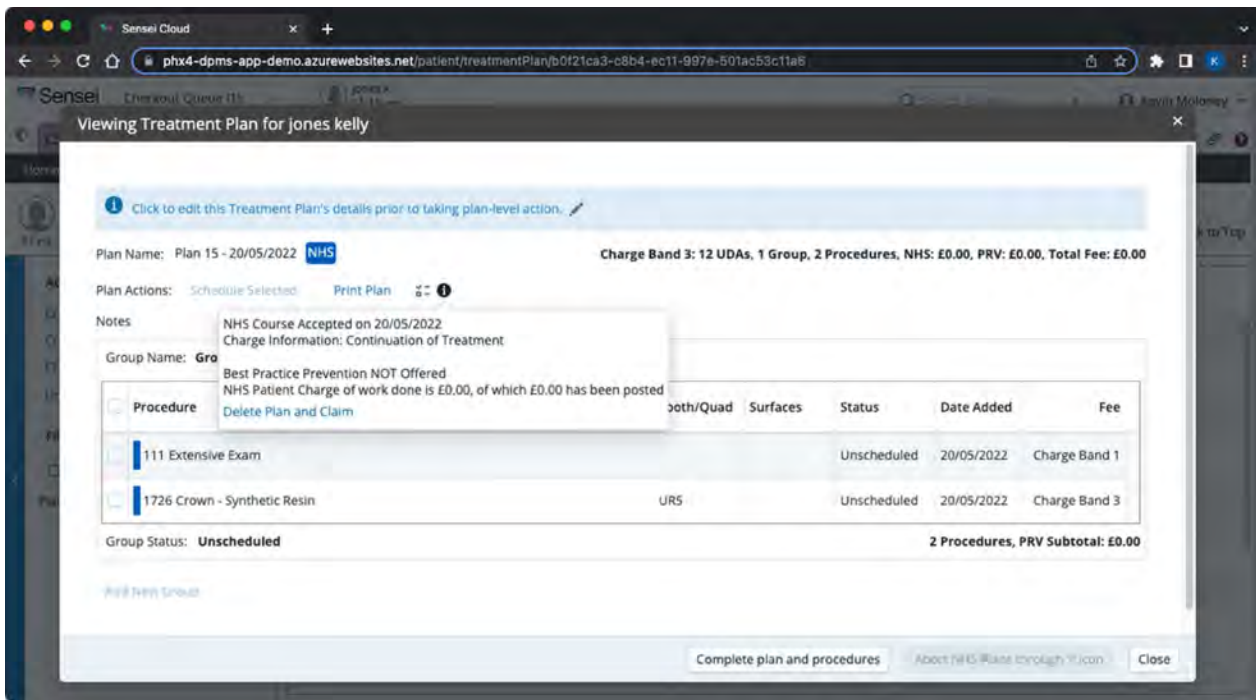
This patient does not currently have an appointment booked today. Choose the location at and date of service on which these procedures were completed.

Location CS Dental Practice

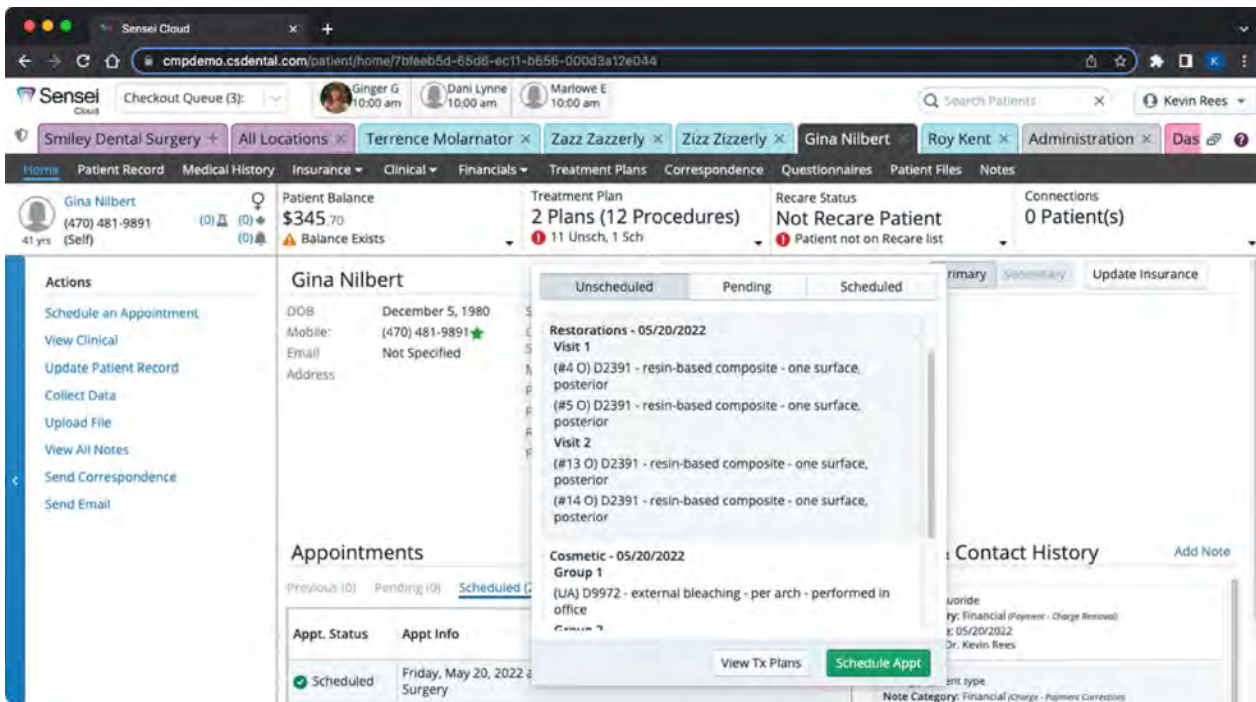
Provider Jonathan Barton

Service Date Today (20/05/2022)

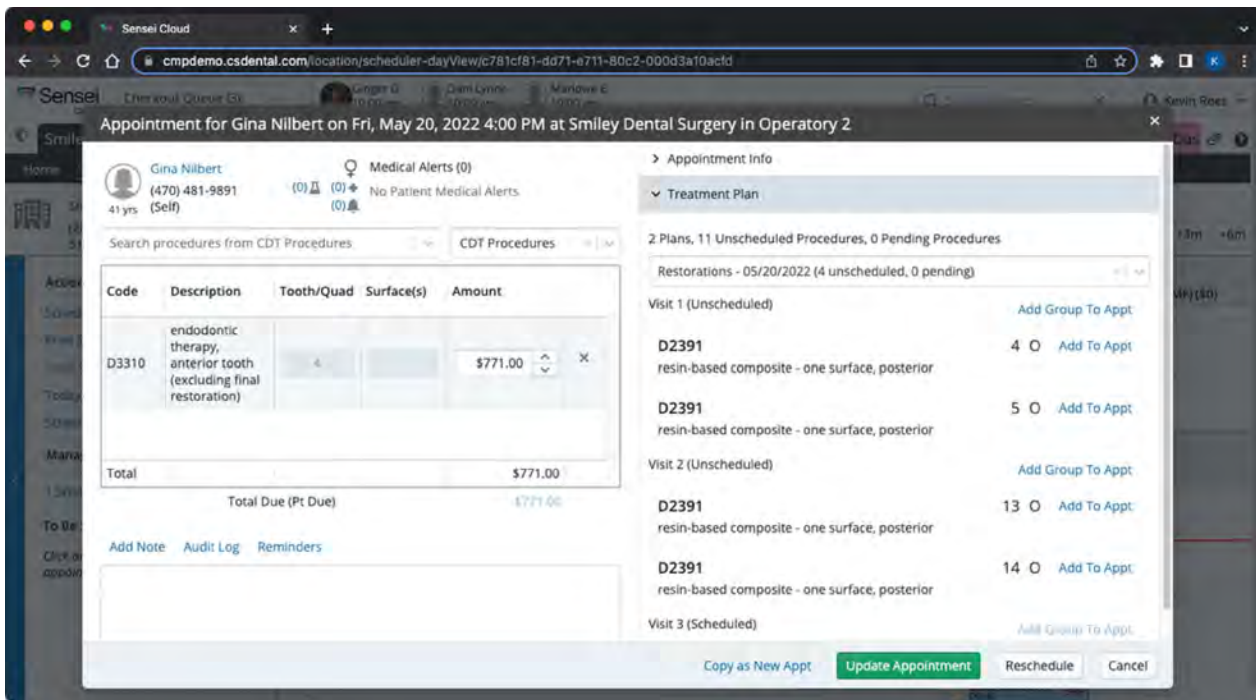
Save **Cancel**



To accommodate the group-based structure of treatment plans, contextually-relevant UIs have been revised throughout Sensei Cloud. This includes the 'Treatment Plan' controls within the Appointment Card, the 'Treatment Plan' module in the banner of the Patient Homepage, and the 'Manage Today's Appointment' dialog (available via the Hard Tissue Chart and Treatment Chart UIs when the patient has a scheduled appointment on the current date). In each case, the design and functionality have been enhanced to represent and leverage the new group-based organization of your treatment plans. For example, the 'Treatment Plan' module in the banner of the Patient Homepage has been reorganized to distinguish the 'Unscheduled' treatment versus the pending and scheduled appointments that contain procedures from the patient's treatment plans [Patient Tab > Home]. The 'Unscheduled' list breaks down the (unscheduled) proposed treatment in a clear plan-by-plan basis, with each plan's groups clearly labeled. The 'Pending' and 'Scheduled' lists now provide a clearer summary of each pending or scheduled appointment with proposed treatment and a link to open the associated Appointment Card.



Additionally, the 'Treatment Plan' accordion panel inside the Appointment Card has been revamped to increase the efficiency and clarity with which proposed, unscheduled treatment can be scheduled. You can select from the patient's available open treatment plans, which now display the number of unscheduled and pending procedures to be addressed. Once selected, the plan's group structure is clearly displayed, including the associated scheduled, pending, and unscheduled procedures. Click the 'Add to Appt' ('Add Group to Appt') link to quickly add the unscheduled procedures to the appointment. As with the previous implementation, clicking on the 'Pending' or 'Scheduled' links opens the associated Appointment Card.



Finally, the 'Manage Today's Appointment' dialog, which is available via the patient's Hard Tissue Chart or Treatment Chart when the patient has an appointment scheduled on the current date [Patient Tab > Clinical > ...]. The 'Planned Procedures' section at the bottom, provides access to the patient's 'Unmanaged Procedures' list and all open treatment plans. When a treatment plan is selected, the group-based structure is clearly displayed. You can quickly and easily complete procedures from any treatment plan, thereby automatically adding it to today's appointment. You can also defer any planned treatment that wasn't completed back to the originating treatment plan (or the 'Unmanaged Procedures' list for procedures not associated with an open treatment plan).

Sensei Cloud

cmpdemo.csidental.com/patient/clinical-hardTissueChart/7bfeeb5d-65d6-ec11-b656-000d3a12e044

Checkout Queue (3): Ginger G 10:00 am Dani Lynne 10:00 am Marlowe E 10:00 am

Search Patients Kevin Rees

Smiley Dental Surgery + All Locations Terrence Molarnator Zazz Zazzerly Zizz Zizzerly Gina Nilbert Roy Kent Administration Das

Home Patient Record Medical History Insurance Clinical Financials Treatment Plans Correspondence Questionnaires Patient Files Notes

Gina Nilbert (470) 481-9891 41 yrs (Self)

Mode: Current Planning

Region Selection: UR, UA, UL, LR, LA, LL

Conditions: 19, Watches: 0, Tx Plans: 1

PSR: ?

New Exam, No Exams Exist, No Historical

Actions: Collect Data, Create New Lab Case, View Patient Screening Data, View Legend, Print Clinical History

Clinical Notes: Search Code, Anatomy, Today's Appointment (01:00 pm Operatory 1) Dr. Jason Parker D2392, D2954, D2740

Sensei Cloud

cmpdemo.csidental.com/patient/clinical-hardTissueChart/7bfeeb5d-65d6-ec11-b656-000d3a12e044

Checkout Queue (3): Ginger G 10:00 am Dani Lynne 10:00 am Marlowe E 10:00 am

Search Patients Kevin Rees

Manage Today's Appointment for Gina Nilbert on Fri, May 20, 2022 1:00 PM

Appointment Summary: Fri, May 20, 2022 1:00 PM (Operatory 1) Dr. Jason Parker 3 Procedures, Total Fee: \$1,784.00

Notes for Checkout

Today's Procedures

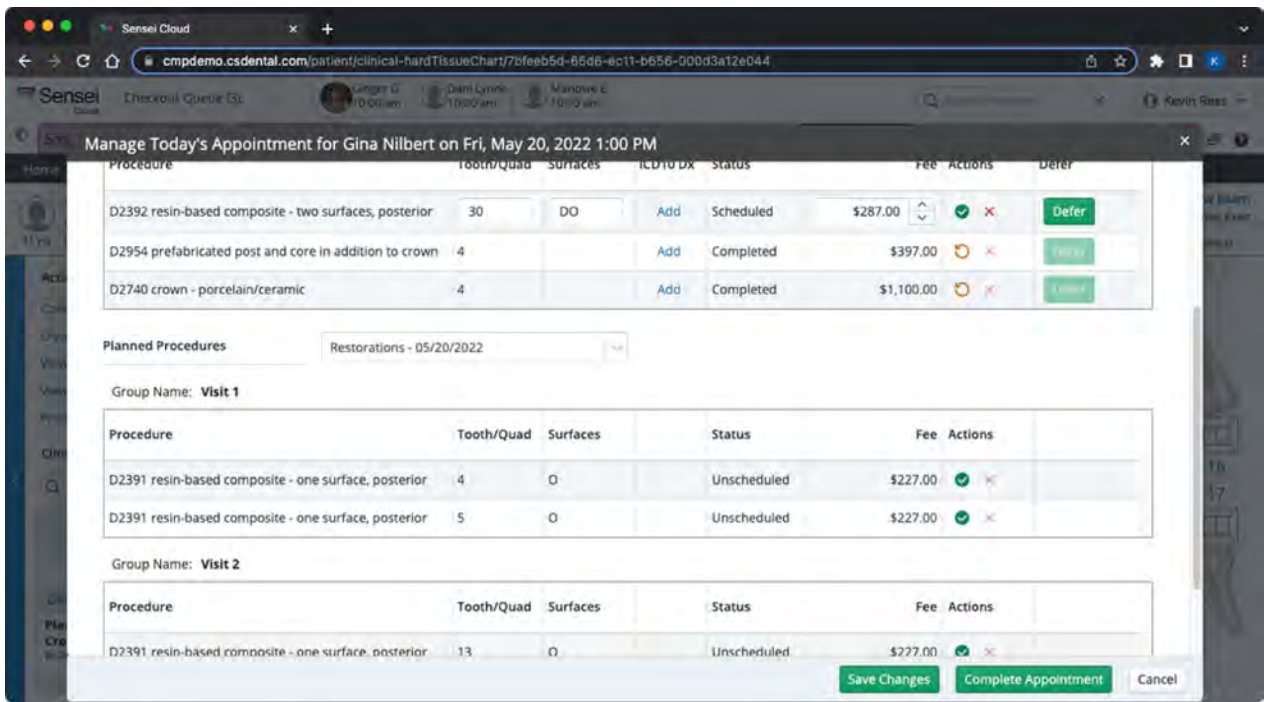
Search procedures from CDT Procedures CDT Procedures

Procedure	Tooth/Quad	Surfaces	ICD10 Dx	Status	Fee	Actions	Defer
D2392 resin-based composite - two surfaces, posterior	30	DO	Add	Scheduled	\$287.00	✓ ✕	Defer
D2954 prefabricated post and core in addition to crown	4		Add	Completed	\$397.00	🔄 ✕	Defer
D2740 crown - porcelain/ceramic	4		Add	Completed	\$1,100.00	🔄 ✕	Defer

Planned Procedures Unmanaged Procedures

Procedure	Tooth/Quad	Surfaces	Status	Fee	Actions

Save Changes Complete Appointment Cancel



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 5]

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