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Sensei Cloud Release 0.1.7739 (Part 5)

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 4]

Identifying Open Treatment Plans (and NHS Courses of Treatment) Without an Appointment

The 'Treatment Plan List' (scheduling worklist) has also been significantly redesigned to improve support for your expressed workflow needs [Location Tab > Schedule > Treatment Plan List]. Namely, this includes a restructuring of the list to be treatment plan-based as opposed to patient-based, which provides more control and visibility into those treatment plans that may require more immediate or regular attention. Previously, the worklist presented a list of patients with 'to be scheduled' treatment items, with no indication of the organization of the patient's various treatment plans. The new worklist presents all open treatment plans, which include at least one procedure in the 'Unscheduled' or 'Pending' state. Treatment Plans that are already completed, closed, rejected, or completely scheduled are automatically filtered from view. NOTE: The 'Unmanaged Procedures' list for a patient is not included in the 'Treatment Plan List', so any proposed treatment added to this general bucket needs to be managed from another context (e.g., [Patient Tab > Treatment Plans > {Unmanaged Procedures}]).

Patient	Plan Name	Next Appointment	Groups / Procedures	Total Fee	Latest Note
Arron Bass	Plan 2 - 01/19/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 1 Procedure	\$94.00	
Arron Bass	Plan 3 - 01/20/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 2 Procedures	\$4,495.00	
Bill Davidson	Plan 1 - 02/25/2020	---	1 Group / 4 Procedures	\$415.25	
Deborah Robinson	Plan 1 - 07/14/2021	May 20, 2022 3:00 PM Smiley Dental Surgery	1 Group / 5 Procedures	\$2,550.00	
Gina Nilbert	Restorations - 05/20/2022	May 20, 2022 4:00 PM Smiley Dental Surgery	3 Groups / 4 Procedures	\$908.00	
Gina Nilbert	Cosmetic - 05/20/2022	May 20, 2022 4:00 PM Smiley Dental Surgery	2 Groups / 7 Procedures	\$7,910.00	
Jeff Vieux	Plan 3 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	4 Groups / 3 Procedures	\$339.00	
Jeff Vieux	Plan 4 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	3 Groups / 3 Procedures	\$433.00	
Keeley Jones	Full Denture - UA	---	1 Group / 2 Procedures	\$1,933.00	

The screenshot displays the 'Treatment Plan List' in the Sensei Cloud application. The interface includes a navigation menu on the left with options like 'Home', 'Schedule', 'Financial', 'NHS Claims', and 'To Do'. The main content area shows a table of treatment plans, filtered by 'All Procedures, All Patients (3)'. The table has columns for Patient, Plan Name, Next Appointment, Total U..., Groups / Procedu..., Total Fee, and Latest Note.

Patient	Plan Name	Next Appointment	Total U...	Groups / Procedu...	Total Fee	Latest Note
Ken Brownlee	PRV Plan 1 - 14/11/2019	---	n/a	1 Group / 4 Procedures	£4,027.00	
James Wright	NHS Plan 2 - 15/05/2022	---	n/a	2 Groups / 2 Procedures	£282.80	
Adam Cox	PRV Plan 2 - 14/11/2019	---	n/a	1 Group / 1 Procedure	£889.00	

Every open treatment plan (associated with the location) is displayed, including multiple entries for an individual patient if they currently have multiple open treatment plans. NOTE: As patients are not rigidly tied to a location in Sensei Cloud, treatment plans are (similarly) not directly associated with a particular practice location. The Treatment Plan list displays open treatment plans based on the patient's association with a location, as defined by the 'Preferred Location' in the Patient Record [Patient Tab > Patient Record]. EXCEPTION: For our UK NHS practices, as there is a direct linkage of an NHS course of treatment to an NHS contract, which is associated with an NHS location (thereby logically linking the treatment plan to the location).

Left click on a treatment plan in the list to expand its details, which displays the Patient Minicard, patient preferences (doctor and location), provides group- and procedure-level detail, and gives access to common actions. NOTE: For NHS courses of treatment, this information includes the associated NHS contract, performer, and location. Clicking on 'Schedule Appointment' automatically creates an appointment for the patient, loads the 'Treatment Plan' accordion in the Appointment Card, and pre-selects the associated treatment plan so that you can quickly add the unscheduled procedures (or groups) to the appointment. Clicking on 'Manage Treatment Plan' opens the 'Viewing Treatment Plan' dialog for the associated plan, enabling you to quickly edit its contents, complete the remaining treatment, or reject the plan (or discontinue treatment).

The screenshot shows the Sensei Cloud interface for Smiley Dental Surgery. The main heading is "Treatment Plan List" with a filter of "All Procedures, All Patients (44)". The interface includes a sidebar with "Filter List" and search options for "Search Plans" and "Search Procedures". The main content area displays a table of treatment plans:

Patient	Plan Name	Next Appointment	Groups / Procedures	Total Fee	Latest Note
Arron Bass	Plan 2 - 01/19/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 1 Procedure	\$94.00	

Below the table, a detailed view for the selected plan shows patient information (Arron Bass, 56 yrs, phone: (756) 555-5108, parent: Blanca Bender), provider information (Dr. Jason Parker), and a table of procedures:

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee (Pt Due)
D7111 extraction, coronal ...	2		Pending since Fri, Mar 25, ...	01/19/2022	\$94.00

Buttons for "Schedule Appointment" and "Manage Treatment Plan" are visible at the bottom of the detailed view.

The screenshot shows the Sensei Cloud interface for CS Dental Practice. The main heading is "Treatment Plan List" with a filter of "All Procedures, All Patients (3)". The interface includes a sidebar with "Filter List" and search options for "Search Plans" and "Search Procedures". The main content area displays a table of treatment plans:

Patient	Plan Name	Next Appointment	Total U...	Groups / Procedu...	Total Fee	Latest Note
Ken Brownlee	PRV Plan 1 - 14/11/2019	---	n/a	1 Group / 4 Procedures	E4,027.00	
James Wright	NHS Plan 2 - 15/05/2022	---	n/a	2 Groups / 2 Procedures	E282.80	

Below the table, a detailed view for the selected plan shows patient information (James Wright, 61 yrs, phone: 07878 787654, self), provider information (Jonathan Barton), and a table of procedures:

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee (Pt Due)
1021 Perio - Prolonged			Unscheduled	15/05/2022	Charge Band 2

Buttons for "Notes" and "Add Note" are visible at the bottom of the detailed view.

In order to more efficiently manage open treatment plans, there are various filters available in the side panel of the Treatment Plan List. You can use the 'plans' search to filter the list of open treatment plans based on patient first name, patient last name, or the name assigned to the treatment plan. Additionally, you can use the 'procedures' search to filter the list of open treatment plans based on an included procedure (by code or description).

The screenshot displays the Sensei Cloud interface for Smiley Dental Surgery. The main content area is titled "Treatment Plan List" and is filtered by "All Procedures, All Patients (44)". A "Filter List" sidebar on the left allows users to search and select specific procedures. The main table lists treatment plans for various patients, including details on the next appointment, the number of groups and procedures, and the total fee.

Patient	Plan Name	Next Appointment	Groups / Procedures	Total Fee	Latest Note
Arron Bass	Plan 2 - 01/19/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 1 Procedure	\$94.00	
Arron Bass	Plan 3 - 01/20/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 2 Procedures	\$4,495.00	
Bill Davidson	Plan 1 - 02/25/2020	---	1 Group / 4 Procedures	\$415.25	
Deborah Robinson	Plan 1 - 07/14/2021	May 20, 2022 3:00 PM Smiley Dental Surgery	1 Group / 5 Procedures	\$2,550.00	
Gina Nilbert	Restorations - 05/20/2022	May 20, 2022 4:00 PM Smiley Dental Surgery	3 Groups / 4 Procedures	\$908.00	
Gina Nilbert	Cosmetic - 05/20/2022	May 20, 2022 4:00 PM Smiley Dental Surgery	2 Groups / 7 Procedures	\$7,910.00	
Jeff Viewx	Plan 3 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	4 Groups / 3 Procedures	\$339.00	
Jeff Viewx	Plan 4 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	3 Groups / 3 Procedures	\$433.00	
Keeley Jones	Full Denture - UA	---	1 Group / 2 Procedures	\$1,933.00	

Based on expressed customer needs, specific new filters have also been added to the Treatment Plan List as an extension of the general overhaul of treatment planning in this release [Location Tab > Schedule > Treatment Plan List]. These new filters are useful to help identify patients that have open treatment plans (e.g., not completed in full) but are not currently scheduled to come into the office. This is particularly important for our NHS practices in the UK, which need to identify these open courses of treatment to determine whether to contact the patient to schedule the remaining treatment or if the course can be closed (e.g., as 'Failed to Return'), allowing the practice to claim for the work that has been completed (e.g., UDAs).

Smiley Dental Surgery
(285) 555-9923
5150 Wooded Glen Drive

Treatment Plan List

Filtered by All Procedures, All Patients (42)

Patient	Plan Name	Next Appointment	Groups / Procedures	Total Fee	Latest Note
Arron Bass	Plan 2 - 01/19/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 1 Procedure	\$94.00	
Arron Bass	Plan 3 - 01/20/2022	May 20, 2022 2:30 PM Smiley Dental Surgery	1 Group / 2 Procedures	\$4,495.00	
Bill Davidson	Plan 1 - 02/25/2020	---	1 Group / 4 Procedures	\$415.25	
Deborah Robinson	Plan 1 - 07/14/2021	May 20, 2022 3:00 PM Smiley Dental Surgery	1 Group / 5 Procedures	\$2,550.00	
Jeff Vieux	Plan 3 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	4 Groups / 3 Procedures	\$339.00	
Jeff Vieux	Plan 4 - 05/18/2022	May 20, 2022 3:00 PM Smiley Dental Surgery	3 Groups / 3 Procedures	\$433.00	
Keeley Jones	Full Denture - UA	---	1 Group / 2 Procedures	\$1,933.00	
Kenneth Smith	Plan 1 - 03/03/2020	---	1 Group / 7 Procedures	\$1,130.00	
new ortho	Plan 2 - 07/06/2021	---	1 Group / 2 Procedures	\$216.00	

CS Dental Practice
Wiltron House

Treatment Plan List

Filtered by All Procedures, All Patients (3)

Patient	Plan Name	Next Appointment	Total U...	Groups / Procedu...	Total Fee	Latest Note
Ken Brownlee	PRV Plan 1 - 14/11/2019	---	n/a	1 Group / 4 Procedures	£4,027.00	
James Wright	NHS Plan 2 - 15/05/2022	---	n/a	2 Groups / 2 Procedures	£282.80	
Adam Cox	PRV Plan 2 - 14/11/2019	---	n/a	1 Group / 1 Procedure	£889.00	

When checked, the 'Hide Pts with Appts' checkbox filters out any open treatment plans associated with a patient that has a currently scheduled appointment in the associated location. NOTE: The appointment just needs to be scheduled in the location; it does not need to be associated with the work from a specific, open treatment plan or any of the patient's treatment plans. If the patient is already scheduled to come into the location, then you will have an opportunity to discuss any open treatment at that time.

The screenshot shows a web application interface for a dental practice. The main content is a table titled "Treatment Plan List" with the following data:

Patient	Plan Name	Next Appointment	Groups / Procedures	Total Fee	Latest Note
Bill Davidson	Plan 1 - 02/25/2020	---	1 Group / 4 Procedures	\$415.25	
Keeley Jones	Full Denture - UA	---	1 Group / 2 Procedures	\$1,933.00	
Kenneth Smith	Plan 1 - 03/03/2020	---	1 Group / 7 Procedures	\$1,130.00	
new ortho	Plan 2 - 07/06/2021	---	1 Group / 2 Procedures	\$216.00	
New Patient 1	Extraction 3rds	---	1 Group / 2 Procedures	\$358.00	
New Patient 13	Plan 1 - 08/28/2019	---	1 Group / 3 Procedures	\$1,429.00	
New Patient 4	Full Denture - LA	---	1 Group / 3 Procedures	\$5,784.00	
New Patient 4	Full Denture - UA	---	1 Group / 1 Procedure	\$1,754.00	
New Patient 5	Full Denture - UA	---	1 Group / 17 Procedures	\$4,618.00	

Finally, our UK NHS practices have an additional 'Associated with {NHS Provider}' filter at their disposal. This filter enables you to limit the list of open treatment plans to those associated with the specified (NHS) provider(s). This relationship between treatment plan and provider only applies to NHS courses of treatment and is based on the treatment plan's assignment to an NHS contract and performer (e.g., NHS provider). NOTE: Private treatment plans do not have any such direct association with a provider and are removed from view by default when applying this filter. This enables you to more easily identify those open NHS courses of treatment - associated with a particular provider (or providers) - that may either require patient follow-up to schedule the remaining treatment or can be otherwise closed, so that the UDAs can be claimed for the completed work. Use of both new filters, in conjunction, can help NHS practices (or NHS providers) identify the most likely candidates for NHS courses of treatment to be FTR'd. NOTE: Click on an NHS course of treatment from the list to expand the treatment plan details, which now include the associated NHS contract, location, and performer.

Treatment Plan List
Filtered by All Procedures, All Patients (3)

Patient	Plan Name	Next Appointment	Total U...	Groups / Procedu...	Total Fee	Latest Note
Ken Brownlee	PRV Plan 1 - 14/11/2019	---	n/a	1 Group / 4 Procedures	£4,027.00	
			n/a	2 Groups / 2 Procedures	£282.80	
			n/a	1 Group / 1 Procedure	£889.00	

Treatment Plan List
Filtered by All Procedures, All Patients, Jonathan Barton (1)


James Wright
NHS Plan 2 - 15/05/2022
61 yrs | 07878 787654 (Self) | Prefs: Jonathan Barton, CS Dental Practice

Contract: NHS Contract
Performer: Jonathan Barton
Location Name: CS Dental Practice

Procedure	Tooth/Quad	Surfaces	Status	Date Added	Fee (Pt Due)
Group Name: Group 1					
1021	Perio - Prolonged		Unscheduled	15/05/2022	Charge Band 2
Group Name: Group 2					
1726	Crown - Synthetic R...	LR5	Unscheduled	18/05/2022	Charge Band 3

We are excited to provide these additional treatment plan enhancements to our customers, especially to meet the more specific needs of our NHS practices in the UK. We look forward to your feedback on how this supports your treatment planning workflows and what additional improvements can be made to make treatment plan management even easier.

[0.1.7739 RELEASE UPDATES CONTINUED ON PART 6]

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Carestream Dental LLC
3625 Cumberland Blvd. Ste. 700
Atlanta, GA 30339

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