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CS Dental Employee

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Sensei Cloud Release 0.1.9375 | 22 Jan 2023

Product Enhancements and New Features:

Insurance-Based Transaction Handling [US Only]

An option has been added to the practice settings for Financial Rules to enable more control over how insurance-based transactions are represented in the patient Ledger and on financial documents. Insurance payments and write-offs (when tied to a claim) – now display the associated claim's ID and date of service.

To access this option, select **Administration > Practice Settings > Financial Rules**. You can choose to have the date on insurance claim transactions reflect **Today's Date** (when posted), or the **Service Date** of the associated claim.

For more information, see How to Set Up Ledger Defaults.

Bulk Insurance Payments

The Bulk Insurance Payment feature (**Location > To Do > Bulk Insurance Payments**) contains the following enhancements:

- The Acceptance Date field is now enabled, and defaults based on your practice preference. You can edit the date as needed.
- Write-offs require comments.
- You can now enter $0 for a claim in a bulk insurance payment, enabling you to close that claim and move forward with subsequent, or secondary billing for those charges.

For more information, see How to Enter Bulk Insurance Payments.

Production by Provider Reporting

The Production by Provider Report feature has been enhanced to improve the way the data is calculated and displayed.

- Unallocated transactions are included in the on-screen, printed, and exported reporting. They are also accounted for in the summary calculations for the on-screen & printed reporting (doesn't apply to the export).
- You can now retroactively correct posted write-off transactions to associate a transaction with a provider, if a provider was not entered for a write-off transaction. You can correct (adjust) this from the Ledger line item.
- Production by Provider is based on Service Date.
- The report filters for and displays a separate list of transactions for which no provider was assigned.
- Additional filters enable refining the list to hide transactions for inactive providers or providers with no data for the specified reporting period.

For more information, see How to Generate Provider Production Reports.

Anesthesia Record (Oral Surgery practices)

You can now print out an Anesthesia Record or save it as a .PDF file. A printer icon was added to the Anesthesia Record panel on the Clinical Chart (EMR) screen. Since not all the fields are required, the print feature captures only the data that was entered into the record, and does not include or display fields that were not completed.

For more information, see How to Create an Anesthesia Record.

Clinical Notes

The Clinical Notes interface has been enhanced slightly to improve usability. As you know, you can access or create Clinical Notes from the Hard Tissue Chart, Soft Tissue Chart, Perio Chart, Clinical Chart (EMR) screen, or the Orthodontic Clinical Summary.

- The Edit/Remove icons are hidden and spaced farther apart to improve accuracy. To reveal them, hover your cursor over the note in the list.
- Notifications resulting from clinical note edit or removal events have been enhanced to provide more contextual information (patient name & note date) and provide a better opportunity to correct a mistake (in case you accidentally edit or remove a clinical note).

For more information, see <u>How to Add Event-Based Clinical Notes</u>.

Recare/Recall Defaults

Sensei Cloud's Recare (US) and Recall (UK) functionality permeates many locations and workflows throughout the software. Most practices use recare/recall workflows on a daily basis, but some specialty practices may not. Those practices now have the option to turn off recare/recall, and simplify their interface by removing unnecessary functions and roles.

This feature is turned on by default, but you can turn it off by selecting **Administration > Practice Settings > Recare/Recall Rules > Edit Recare/Recall Settings**. At the top, you will see the option**: This Practice Utilizes Recare/Recall**. Select **No** and click **Save**.

Bulk Correspondence Workflow

(Recare/Recall List, Patient List Report, Referral Follow-Up List)

In response to customers experiencing a reduction in application performance issues when generating and sending multiple types of bulk correspondence, the following enhancements have been implemented to improve speed and usability:

- The **Bulk Correspondence** file is now generated on the back end, asynchronously, so that users can continue to work in Sensei Cloud while

this process is happening rather than being stuck behind a progress indicator.

- The **Select All** option has been restored to the Patient List Report (**Dashboard > Reports > Patient List**).
- Temporary messages are displayed at the bottom of the screen when a list is generating and when the task is complete, enabling the user to proceed with other workflows during the process.
- PDF files can be retrieved from the new **Bulk Correspondence** screen, located on the new **Archives** menu (**Archives > Correspondence**) where correspondence files are stored and accessible for future download.
- The **Referral Follow-Up** List now only supports individual correspondence, requiring the use of a 'Referral' type (category) template. Each line item now contains an individual option to **Send Follow-Up** (green button).

Archives Menu

To help facilitate the retrieval of previously-generated documents, a new **Archives** menu has been added to the **Location** tab for accessing **Correspondence**, **Archived Daysheets**, **Bulk Statement Reports**, and **eServices Reports**.

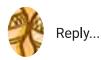## Defects

14 miscellaneous items were addressed.

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