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CS Dental Employee



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## Sensei Cloud Release 0.1.9482 | 29 Jan 2023



**Product Enhancements and New Features:**

### Referral Source Demographics

Because Referral Sources are an important part of your business, Sensei Cloud now provides a better way to record and access important details about these providers. By storing professional and personal details in a centralized location, you can quickly access the information you need to initiate smoother professional interactions and strengthen working relationships.

To display the **Referral Sources** list, select **Administration > Practice Settings > Referral Sources**. The list is populated with existing sources added to your practice in the Patient Records. From here, you can add a new resource or select a name from the list to update the details. The **Referral Entry** tabs are displayed.

The screenshot shows a web interface for 'Referral Entry'. At the top, there are four tabs: 'Referral Entry', 'Provider Info', 'Clinical Preferences', 'Interests/Family', and 'Public Relations'. The 'Provider Info' tab is selected. The form is divided into several sections:

- Personal Information:** Fields for First Name (Kevin), Last Name (Johnson), Title, Specialty (Please select a specialty...), Birthday (Month and Day dropdowns), NPI Number, and UPIN.
- Address:** Fields for Practice Name (SkyMall Dental), Practice Address (8587 Main Street), Street Line 2, City (Atlanta), State (Georgia), and Zip Code (30339).
- Contact:** Email field, a phone number field containing '(555) 551-5161', and a radio button for 'Add Phone Number'. Below this is a 'Correspondence Preferences' section with radio buttons for 'Email' and 'Letter'.
- Referral Status:** Radio buttons for 'Active' and 'Inactive'.
- Notes:** A large empty text area for entering notes.

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

- Use the **Provider Info** tab to update personal and contact information, correspondence preference, status, and enter any additional notes.
- Use the **Clinical Preferences** tab to enter the provider's preferred Implants, Lab locations, and additional notes.
- Use the **Interests/Family** tab to make notes about interests, hobbies, family information, and so forth, that you want to remember when meeting or communicating with the provider through work or in your community.
- Use the **Public Relations** tab to record gifts or events used for marketing purposes with the provider.

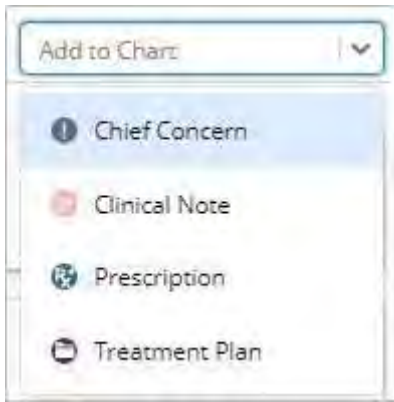
**Note:** These new data fields interface with the existing referral-based functionality.

For more information, see [How to Manage Referral Sources](#).

## Clinical Chart (EMR) Design Enhancements

The EMR screen is the central access point for a patient's clinical details, and therefore the focus of continued enhancements in functionality and visual design. This week's updates include some noticeable, colorful improvements:

- The **Add to Chart** list now has more selections.



- Each entry type now has a colorful icon to aid in visually identifying items on the screen.
- Cards are now displayed for Tx Plans events, Clinical Questionnaires, Prescription events, Chief Concerns, Clinical Notes, Lab Cases, and Procedures, as well as additional entry types for oral surgery practices.
- Each card displays the icon (entry type), the user name and date/time stamp of the entry, as well as a number of relevant controls for adding, editing, removing, or displaying history.
- Additional controls (such as **Show More** and **View Data**) are present in relevant spaces to improve the workflow and link to additional entry fields.
- New filters were added to enable sorting of the EMR list by **Treatment Type** and **Date Range**.

- **Vitals** cards (oral surgery) now include the ability to edit details, remove the entry, and view history of edited entries.

## Improved Handling of Patients “Not on Recare/Recall”

General Dentistry practices have been asking for a better way to quickly identify and process patients who are not on Recare (US) or Recall (UK) schedules. Sensei Cloud now delivers.

- A **Not on Recare/Recall** status was added to the **Recare/Recall Worklist**. (**Location > Appt. Worklists > Recare/Recall List**).
- The **Recare Stats** widget (**Location > Home**) now includes an active link for **Patients not on Recare/Recall**. Click this link to access the worklist already

filtered for patients on the list.



- When you select a patient on the list to display details, there is now a button to **Put on Recare/Recall**, which updates the status from **Not on Recare/Recall** list to **Due**. You can also click **Schedule Recare/Recall** to schedule an appointment, which puts them on recare/recall.

For more information, see [How to Use the Recall/Recare List](#).

## Ortho Contract Transaction Enhancements (US Only) (Ortho Only)

Orthodontic Practices will see more information on the Ledger for active Ortho contracts. Automated transactions, such as down payment installments and periodic charges, now include more details in the description and comments.

Total Balance	Contract Balance	Current Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
\$3,459.46	\$2,020.82	\$1,438.67 ⚠ Balance Exists	\$1,438.67 ⚠	\$0.00	\$0.00	\$0.00	\$560.27	\$878.40 ⚠

Trans Date	Service Date	Code	Description	Amount To Current	Amount To Total	Current Balance	Total Balance
01/23/2023	01/23/2023	Ins. Ortho Contract Charge	Full Treatment - 18 months - Provident - Mercy Hospital	\$187.50	\$0.00		
01/22/2023	01/22/2023	Pt. Ortho Contract Charge	Full Treatment - 18 months - Guar: Marlove Eichler	\$250.00	\$0.00		

- The **Description** fields for each charge display who is responsible, such as the **Guarantor** or **Insurance Payer - Plan**. This is particularly useful for contracts that have multiple insurance payers.
- Additional details are also added to down payment transactions for new contracts going forward.
- When you select a line item to view details, a comment has been added that indicates the number of the total number, such as **“Charge #: 3 of 4”** as defined in the contract. This enables you to keep track of the status of the contract’s scheduled transactions.

**Note:** These changes are visible going forward; previous Ledger entries are not updated.

For more information, see [How to Create an Ortho Contract](#).

## Taxonomy Code Updates for NUCC Guideline Compliance (US Only)

The **Taxonomy Code** list has been updated per the latest National Uniform Claims Committee (NUCC) guidelines to ensure that locations and providers are correctly classified when billing for services. A new Oral & Maxillofacial Surgery code (204E00000X) has been added. Additional Oral & Maxillofacial Surgery codes identify specific provider types.

- To assign a Location code, select **Administration > Location Settings**. Click **Edit Selected Location**, and then scroll down to the **Business** section. Select the appropriate code and click **Save**.
- To assign a code to a Provider, select **Administration > Team > Team Members**, and then select the provider. Click **Edit Selected Team Member** and use the **Taxonomy Code** field to select the appropriate code. Click **Save**.

## Defects

11 Miscellaneous Items were addressed, including:

- An issue with mixed NHS/private practices in which patient NHS information was not accessible when the user was logged into the non-NHS location.
- When generating a statement batch, the **Exclude if Patient had Outstanding Claims** filter now ensures that your list of patients receiving statements will properly account for any open insurance claims (if you choose to enable the filter).
- Various minor UI fixes were made to the Lab Case functionality.

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