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Sensei Cloud Release 0.1.9582 | 12 Feb 2023



Product Enhancements and New Features:

Ortho Continuation of Treatment Enhancements (US Only) (Ortho Only)

You now have more control when managing continuation of treatment (COT) insurance claims for your patients with Ortho contracts. **Ortho Coverage** settings have been added to the **Fee Coverage** details for Insurance plans, enabling you to specify the defaults for the charge frequency and the necessity of continuation of treatment (COT) claims.

When these settings are defined for a plan, they are reflected in any charge schedule you create for an Ortho contract using the plan.

Note: The values can be edited as needed on the schedule.

To access the Ortho Coverage settings:

1. Select **Administration > Insurance > Plans**.
2. Select **Add New Plan**, or click on the **Plan Name** of an existing plan. The **Create/Update Insurance Plan** window is displayed.
3. Scroll down to **Fee Coverage Information > Ortho Coverage**.

The screenshot shows the 'Update Insurance Plan' window with the following details:

- Fee Coverage Information**
- Coverage Information**
 - Coverage Method: Percentage Flat Fee
 - Annual Coverage Period (MM/DD): 01/01 to 12/31
- Monetary Limits**
 - Individual: Deductible \$50.00, Maximum Allowable Benefit \$1,500.00
 - Family: Deductible \$200.00, Maximum Allowable Benefit \$6,000.00
- Ortho Coverage** (highlighted with a red box)
 - Ortho Charge Frequency: Monthly (dropdown menu highlighted with a red box)
 - COT Claims Not Required
- Update** (highlighted with a red box) and **Cancel** buttons at the bottom right.

4. For **Ortho Charge Frequency**, select **Monthly, Quarterly, Semi-Annually**, or **Annually**.
5. If the Insurance payer/plan does not require or accept COT claims, select the **COT Claims Not Required** option.
6. Click **Create** or **Update**.

Note: When creating COT claims, the frequency is inherited and the default CDT code is D8670.

Custom Correspondence Using Data Export and Microsoft Word Templates

If you have correspondence templates that you use regularly, or if you want to customize new templates, you can use Data Export templates to merge patient data from Sensei Cloud into your external Microsoft Word documents and templates.

Note: This process requires the full application version of the Microsoft Word (or other) software that uses merge fields, and not the web-based (browser) version.

When Data Export templates are enabled, you can:

- Export data via a .CSV (spreadsheet) file from Sensei Cloud to third party applications.
- Create and manage templates for multiple correspondence categories.
- Select external templates when generating correspondence from any of the usual locations within Sensei Cloud (**Patient** tab, **Dashboard > Patient List**, etc.).

To use this feature, you will:

1. Enable the feature.
2. Create a data export template.
3. Generate correspondence in Sensei Cloud using an External Template.
4. Open your existing letter template in Microsoft Word.
5. Link the data export (.CSV) from Sensei Cloud to the Word template.
6. Insert merge fields into the Word document.
7. Generate letters with the newly merged data.
8. Save the Word template to reuse for future letters.

For more information and instructions, see [How to Generate Custom Correspondence with Microsoft Word and Data Export Templates](#).

Insurance Write-Off Distributions

The credit distribution functionality has been tightened up to prevent over distributions of insurance write-offs (credits) when the estimation data under-predicted remittance (e.g., insurance paid more than expected).

To apply write-off distributions:


1. Select **Patient Tab > Financials > Ledger**.
2. Select a transaction and click **Apply This {Transaction Type}**.

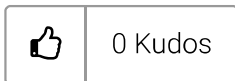
When you access this function, Sensei Cloud now defaults distribution values when distributing a Contracted Insurance Write-Off to the lesser of the values between the following:

- Originally estimated write-off value for the given charge.
- Remaining, uncovered amount left on the charge (e.g., what isn't already covered by other, existing distributions).
- Amount still available to distribute from the write-off.

Defects

11 miscellaneous defects were addressed in this release.

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