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CS Dental Employee

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Sensei Cloud Release 0.1.9764 | 26 Feb 2023

Product Enhancements and New Features:

## Patient Preferred Location Visibility Enhancement

To improve scheduling accuracy for practices with multiple locations, a visual notification has been added to alert you when scheduling an appointment in a location that is not the patient's preferred location.

Note: Location fields in Sensei Cloud default to the location to which you are currently logged in.

Note: A patient's Preferred Location is designated in the **Patient Record** and is displayed on the **Patient Home** screen and **Patient Snapshot**. To update this value, select **Patient > Patient Record > Edit Patient Record**, and scroll down to **Patient Preferences**.

When you are defining an appointment for a location that is NOT the preferred location, a notification icon is displayed next to the **Location** field. You can hover over this icon to see the **Preferred Location** and adjust the appointment as needed.
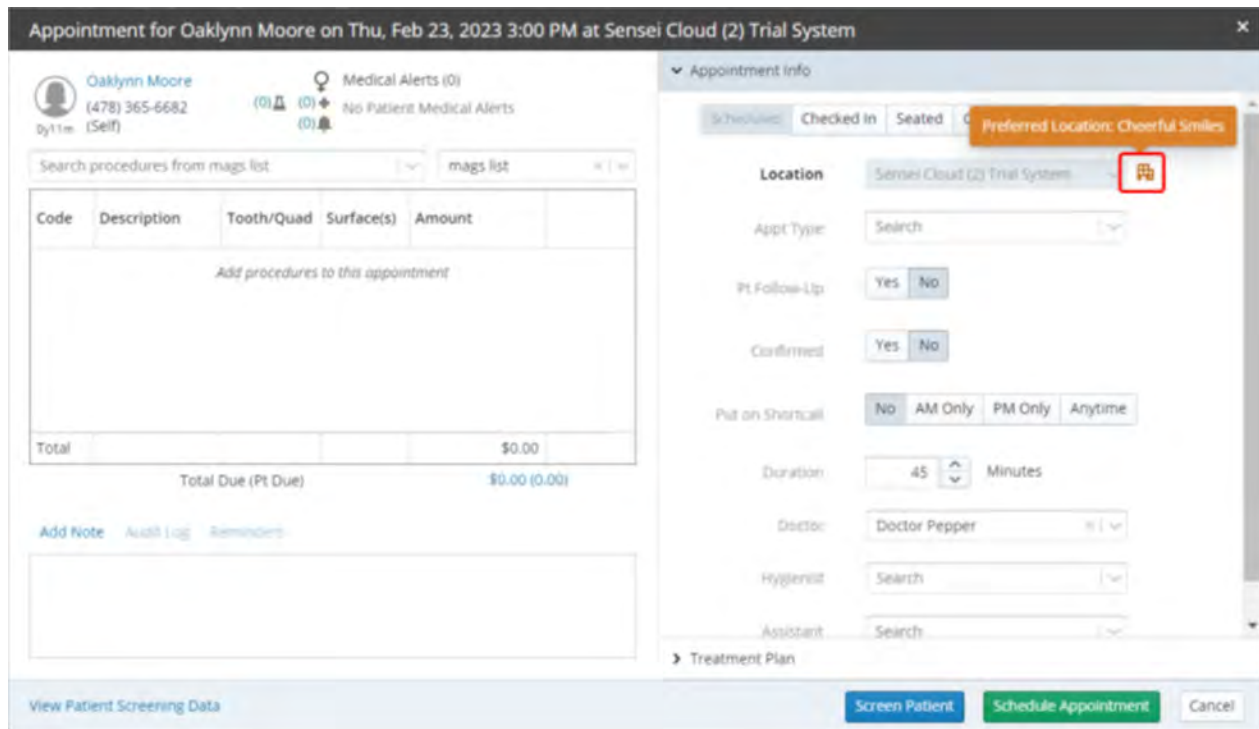
## Scheduling in Non-Preferred Location
If you want to schedule an appointment in the patient's non-preferred location, you are prompted to verify before continuing. Once the appointment is saved, the icon is displayed on the **Appointment Card**, the **Appointment Tile** on the Schedule, and on the **Confirmation List**.
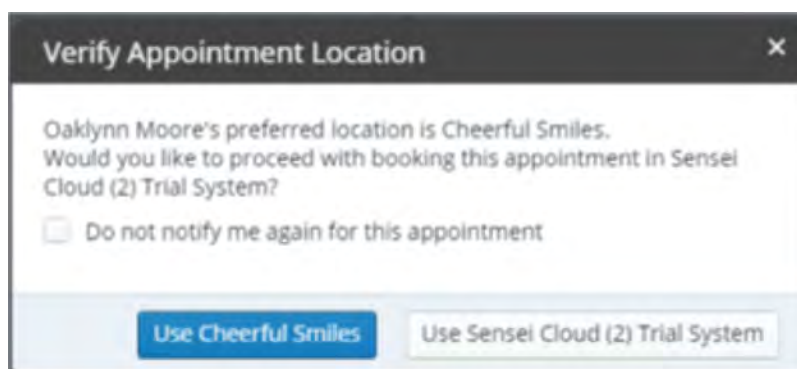
Enabling This Feature
You must enable this feature in Practice Settings before you can use it. To enable this feature:

1. Select **Administration > Practice Settings > Notifications**. **Practice Notifications** are displayed.
2. Click **Edit Practice Notifications**.
3. Under **Schedule Notifications**, click **Enable**, and then click **Save**.
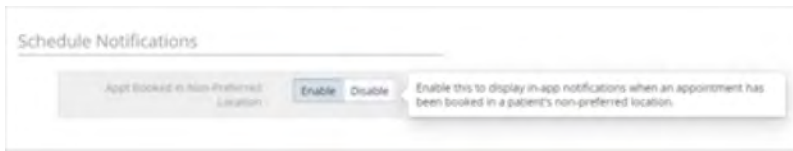
Improved Accessibility of Insurance Information

Plan Name Display

The notation of **(Dental)** or **(Medical)** has been added to a patient's insurance plan information, in all the locations where the name of the plan is displayed for the patient.

Allowance Table Access

Sensei Cloud has made it easier to view and update allowance tables for dental insurance plans. The **Update Insurance Plan** window has a new **View Allowance Table** option that enables you to jump directly to the plan's table, where you can view and edit the details as needed. You can access the **Update Insurance Plan** window not only from its primary location (**Administration > Insurance > Plans** [Coverage Colum] **> View**), but also from locations such as the **Patient Home** screen or **Patient Record**, where the plan name is hyperlinked.

New Procedure Trend Analysis Report by Referral

The new **Procedure Trend Analysis** report is available, providing you with insight into the business that referral sources provide your practice.

The report includes:

- Patient count
- Procedure count (by procedure type)
- Production value associated with each referral source for the selected reporting period, as well as the previous period (e.g., this quarter and this quarter last year), indicated by PY (prior year)

To generate this report:

1. Select **Location > Referrals > Procedure Trend Analysis**.
2. Use the **Filter List** to select one or more **Referral Sources**, define the **Reporting Period**, and narrow the report by **Treatment Types**, as desired. The list refreshes based on your selections.


Enhanced Clinical List Maintenance

This release provides a centralized location for managing your **Clinical** lists, such as Clinical Rules, **Medical Alerts, Patient Chief Concerns**, and so forth.

The **Administration** tab (**User Menu > Administration**), now contains a **Clinical** menu, where you can select and display a list and make the necessary updates. **Note**: You must have **Administrator** group permissions to access the **Administration** tab; **Manage Clinical Lists** is also a separate permission under **User Permissions > Clinical.**

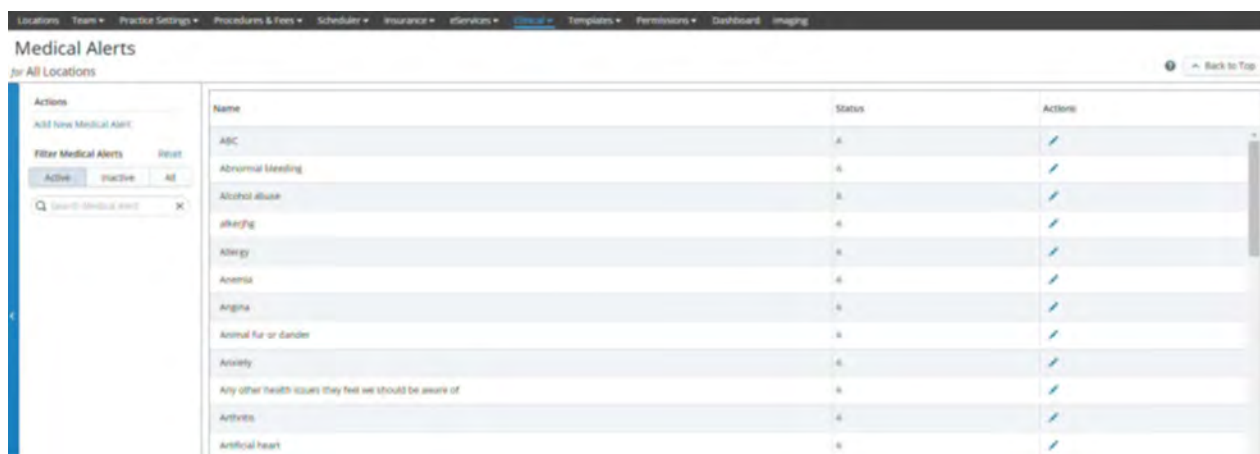- Dental and Ortho practices can access these screens:
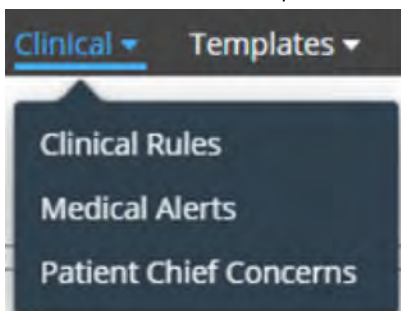
- Oral Surgery practices have additional lists:

When you select a Clinical list, you can:

- Add an item to the list.
- Use the **Filter** and **Search** features to find and edit an item (pencil icon, green check to save).
- Change the status (active or inactive).

Note: When you edit an item that has already been used on a patient's record, you are prompted to confirm the action, as changes made to this list will affect all records where the label is used.

Ability to Flag Allergies and Medications as Medical Alerts
(Oral Surgery Only)

Using the Clinical List maintenance feature (described above), Oral Surgery practices can now designate an Allergy or a Medication as a Medical Alert, so that any use of those labels also generates a Medical Alert for the patient to whom it is applied.

Novocaine	A	✏
Peanuts	A	✏
Penicillin ☑ Medical Alert	A ⓘ	✔ ✖
Seasonal Allergies	A	✏

To designate an item as a Medical Alert:

1. Select **Administration > Clinical > Allergy** or **Medication**. The corresponding list is displayed.
2. Select the item you want to flag, and then click **Edit** (pencil icon). A **Medical Alert** checkbox is displayed next to the name of the Allergy or Medication.
3. Select the checkbox and then click the green check to save. The item is designated as a Medical Alert, and will be displayed in both panels (Allergy or Medication and Medical Alert) whenever it is used for a patient.

Penicillin ✚

Defects

18 miscellaneous defects were addressed in this release.

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Reply

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For more information, see:

- How to Generate a Procedure Trend Analysis Report by Referral
- How to Manage and Update Clinical Lists
- How to Flag Allergies and Medications as Medical Alerts

✏ Add tags

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