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Sensei Cloud Release 0.1.6913 (Part 4)

Sensei Cloud

Weekly Release

Build 0.1.6913 | October 10th, 2021

This week's Sensei Cloud updates continue to expand core application functionality and deliver on recent customer requests.

[0.1.6913 RELEASE UPDATES CONTINUED FROM PART 3]

Generating Pre-Auth Claims for Ortho Contracts

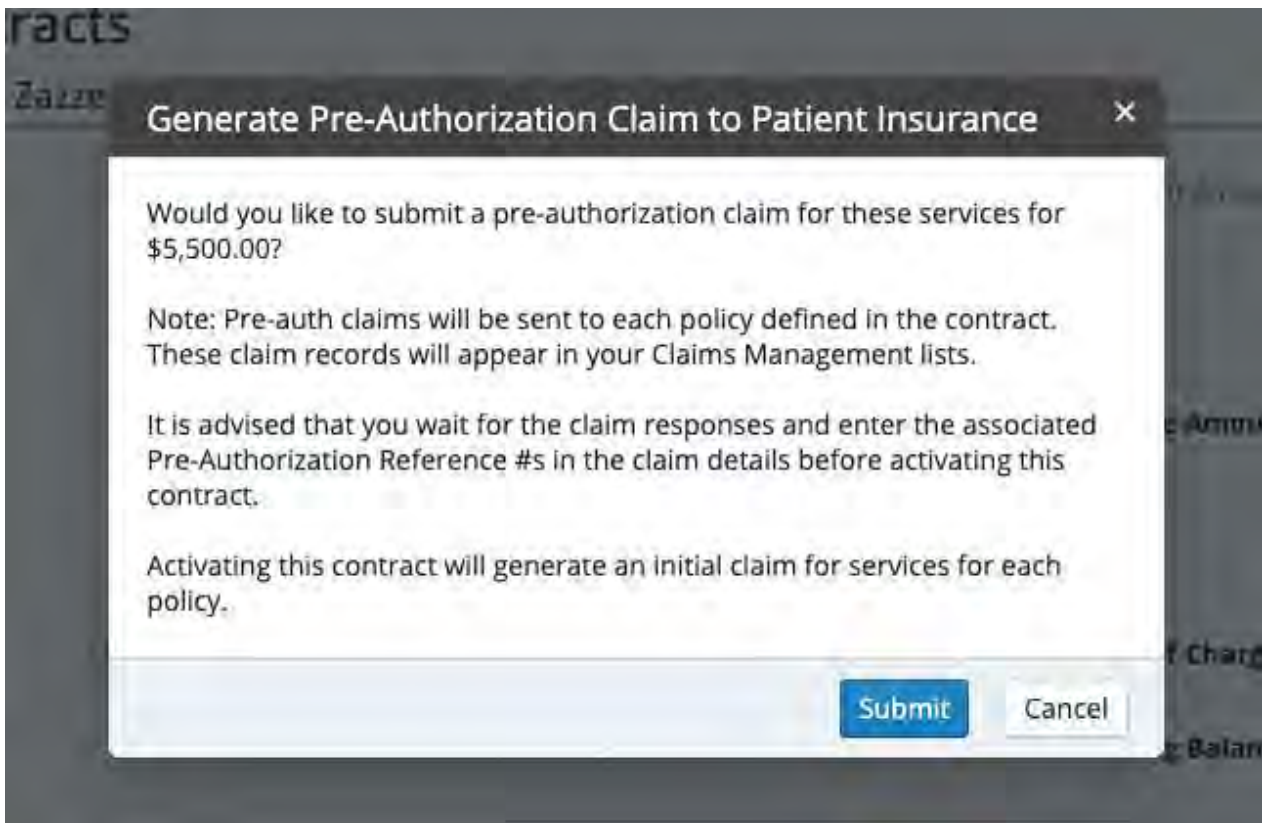
This week's release also includes support for the generation of pre-authorization claims as part of the creation of orthodontic contracts. This update provides you with a means of verifying expected insurance coverage before finalizing the financial terms and activating the contract.

You are now prompted to create pre-authorization claims upon saving a new or pending ortho contract, which contains at least one insurance schedule. The services (CDT codes) submitted on the pre-auth claim(s) are defined in the 'CDT for Initial Billing' (the 'primary' code that carries the contract's fee) and the 'Addl. CDT for Initial Claim' fields. As noted in the dialog, it is suggested that you wait for the payer response before activating the contract. NOTE: Activating a contract automatically generates the initial service claims, thus negating any utility of unadjudicated pre-auth claims. Click 'Submit' to generate a pre-auth claim for each defined insurance schedule and to save the pending contract. As with general claim creation, notifications are displayed upon pre-auth claim creation.

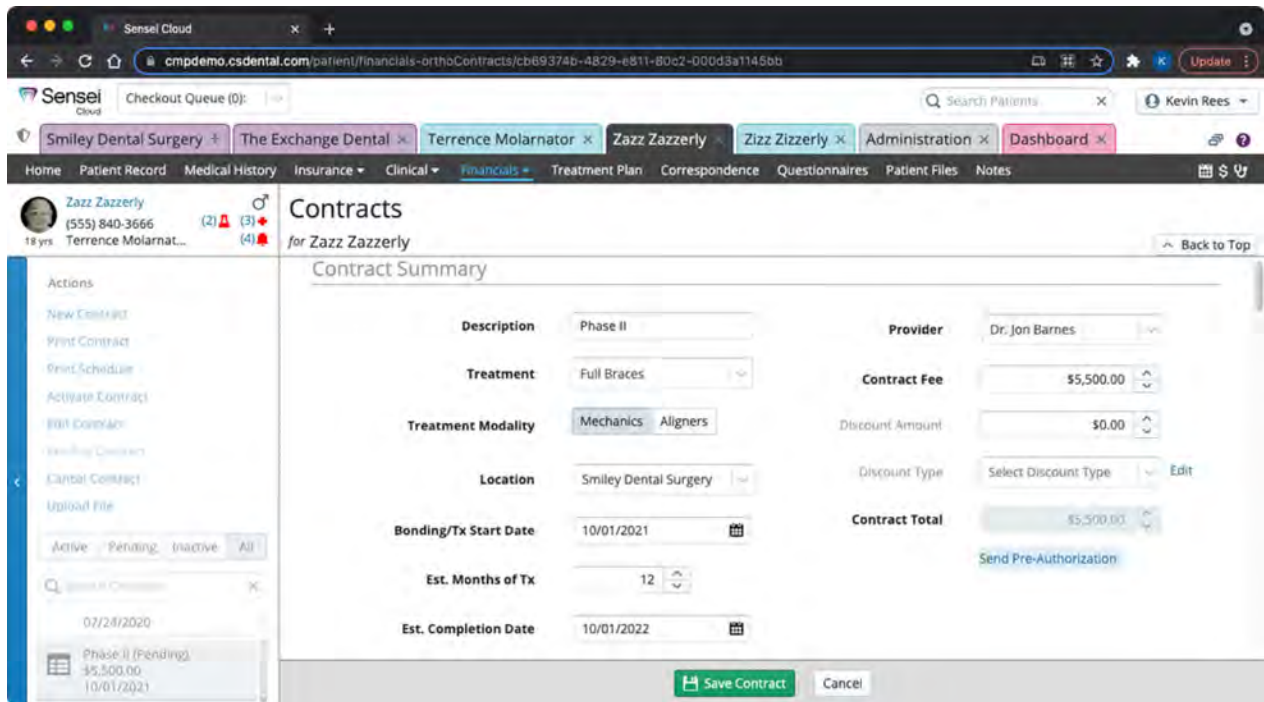
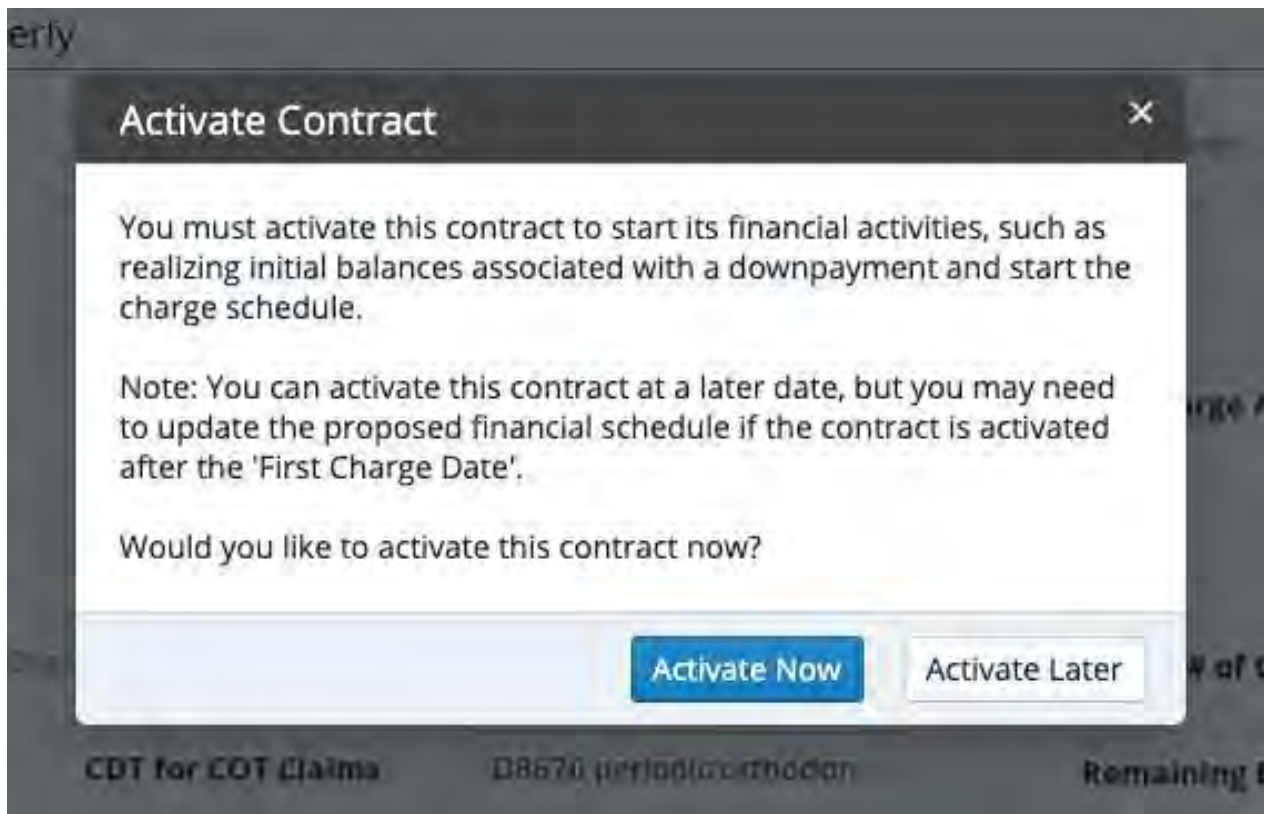
The screenshot displays the 'Contracts' form for patient Zazz Zazerly. The form is titled 'Contracts for Zazz Zazerly' and includes the following fields and values:

- Plan:** Metlife - CSD Enhanced
- Amount:** \$1,500.00
- Frequency:** Monthly
- First Charge Date:** 11/06/2021
- CDT for COT Claims:** D8670 periodic orthodont
- Charge Amount:** \$62.50
- # of Charges:** 12
- Remaining Balance:** \$750.00
- Downpayment Amount:** \$750.00

The interface also shows a sidebar with 'Actions' (New Contract, Print Contract, Print Schedule, Activate Contract, Edit Contract, Upload File) and a 'Save Contract' button at the bottom.



NOTE: If you click 'Cancel' in this dialog, you are prompted to activate the contract. If you click 'Activate Now' the contract becomes active, the initial service claim(s) are generated, and the initial contract charges are posted to the ledger. If you choose 'Activate Later', the contract remains in a Pending state. You can generate pre-auth claims at a later time by clicking the 'Send Pre-Authorization' hyperlink available in the 'Contract Summary' section of a pending contract.



REMINDER: Pre-auth claims generated from ortho contracts default to a 'Needs Info' or 'Pending Review' status, depending on your configuration. This gives you the opportunity to define the additional details for the proposed treatment. Click on the 'View Claim' link in the notification displayed in the Ortho Contract screen when generating the pre-auth claims or navigate to the patient's claims worklist [Patient Tab > Insurance > Claims Management]. Click the pre-auth claim to display its claim summary and then click 'Edit Additional

Info' to define any remarks and specify the months of treatment before submitting the claim. Once the payer response is received, you can add the reference number to the pre-auth claim record (via the Claims Management screen) and then activate the contract. The pre-auth claim(s) details are included with the initial service claim(s).

Claims Management
For Zazz Zazzerly

Claim Number	Status	D/M	Location	Type	Provider	Last ...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Awaiting Attachments		Smiley Dental Surgery	Pre-Auth	Dr. Jon Barnes	10/06/...	Metlife	CSD Enhanced	D8090	\$5,5...	\$0.00

Pre-Authorization Claim Summary

Warning: Claim Does Not Require Attachments - Click Skip Attachments to Submit Without Attachments

Claim Details:
 Patient: Zazz Zazzerly (555) 840-3666, 18 yrs
 Policyholder: Terrence Molarnator (Parent)
 Created On: 10/06/2021
 Status: Awaiting Attachments

1 code performed at Smiley Dental Surgery for a total of \$5,500.00

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D8090	comprehensive orthodontic treatment of the adult dentition			Dr. Jon Barnes	TBD	\$5,500...	

Buttons: Skip Attachments, Submit Claim, Print Claim, Apply Payment, Edit Additional Info, Update Status, Cancel Claim

Additional Claim Information

Box 35. Remarks:

Box 41. Date Appliance Placed: 10/01/2021

Box 42. Months of Tx Remaining: 12

Box 44. Date of Prior Placement:

Buttons: Save Changes, Cancel

The screenshot displays the 'Claims Management' page for patient Zazz Zazerly. On the left, there are navigation tabs for 'Smiley Dental Surgery', 'The Exchange Dental', 'Terrence Molarnator', 'Zazz Zazerly', 'Zizz Zizzerly', 'Administration', and 'Dashboard'. The main content area shows a table of claims with columns for Claim Number, Status, D/M, Location, Type, Provider, Last..., Payer, Plan, Includ..., Billed, and Paid. A 'Pre-Authorization Claim Summary' is expanded for claim 114000000000, showing it is 'Queued' and created on 10/06/2021. The summary includes patient and policyholder information, and a table of CDT codes performed at Smiley Dental Surgery.

Claim Number	Status	D/M	Location	Type	Provider	Last ...	Payer	Plan	Includ...	Billed	Paid
114000000000...	Queued		Smiley Dental Surgery	Pre-Auth	Dr. Jon Barnes	10/06/...	Metlife	CSD Enhanced	D8090	\$5,5...	\$0.00

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
D8090	comprehensive orthodontic treatment of the adult dentition			Dr. Jon Barnes	TBD	\$5,500...	

NOTE: You can re-generate pre-auth claims, if needed, to account for issues identified in the explanation of benefits you receive. Simply cancel the pre-auth claim via the patient's claims worklist [Patient Tab > Insurance > Claims Management]. Then make any necessary adjustments to the patient's insurance (via the Patient Record) or the contract details (such as the CDT codes to bill) and then click the 'Send Pre-Authorization' hyperlink in the contract. Alternatively, any updates made to the insurance policies or associated schedules while the contract is pending are reflected in the initial service claim(s) generated upon contract activation.

We hope that these enhancements provide support for your financial workflows and increase your confidence in the anticipated insurance coverage before finalizing the terms of the financial agreement. We look forward to your feedback on what works well and what additional enhancements can be made.

Optimizations and Fixes

The following fixes and optimizations have been added to Sensei Cloud this week.

1. [US Only] Addressed an issue in planning mode of the Hard Tissue Chart that prevented the selection of CDT codes associated with 'retainer crowns' when planning a bridge.
2. Resolved an issue in which the appointment queues (e.g., Waiting / Seated / Checkout Queues) could create application performance issues when an excessive number of appointments were loaded into a queue state.
3. [UK Only] Fixed an issue with the function of the Exemption field for a patient's NHS Details when creating or editing a patient record.
4. Adjusted the default color values assigned to the 'Glass Ionomer' and/or 'Composite' materials to help better visually distinguish restoration in the Hard Tissue Chart.
5. [US Only] Fixed an issue in which adjustments made to an ePayments transaction would create errors (if it had been distributed using the Applied Payments functionality).
6. [US Only] Addressed a defect which prevented the generation of bulk / batch statements (via the Accounts Receivable screen).
7. Resolved a UI defect in which the ordering of the clinical notes included in the Clinical History and Treatment Plan printouts (via the Hard Tissue Chart).

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