

Initial Training Workbook

Sensei Cloud



**Your Guide to a
Successful Transition**

Sensei Cloud

Initial Training Workbook

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Introduction

This workbook includes the following lessons. To access a lesson, click the link:

- [Adding Patients](#)
- [Scheduling Patients](#)
- [Checking Patients In and Out](#)
- [Working with Insurance](#)
- [Working with Charges and Payments](#)

Accessing the Shared Trial Sensei Cloud Database

We at Carestream Dental want your transition to our premier practice management system to go smoothly, and we believe that every opportunity that you have to learn can help you with this transition. During your training, and while your data is undergoing conversion to Sensei Cloud, we want you to be able to try the software so that you are prepared for your first live day. For this reason, we provide you access to a **SHARED TRIAL** Sensei Cloud database where you can practice what you learn and can complete the skill sharpeners outlined in this workbook.

To access Sensei Cloud and this **SHARED TRIAL** database:

- 1 Navigate to the website: <https://gosensei.us>.
- 2 Enter the following login information:

Email: SenseiCloud@outlook.com

Password: **\$enseiC!**

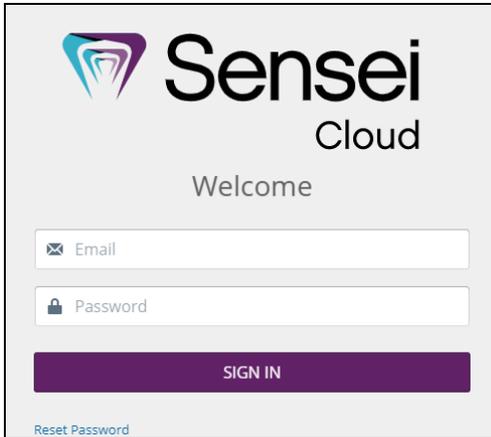
Disclaimer: Carestream Dental provides access to this Sensei Cloud **SHARED TRIAL** database for the purpose of learning. **Please be aware that much of the data that exists in this database has been added directly by other clients and should not be used for any purpose other than testing the program.** Since you and other clients will have access to any information you enter, **DO NOT USE ANY PERSONAL IDENTIFIABLE INFORMATION OR PATIENT HEALTH INFORMATION;** Use Only Fictitious or Made Up Information to Protect the Privacy of Patients, Staff, and Others. Fictitious data includes any identifiers, including but not limited to, patient/staff names, addresses, phone numbers, social security numbers, and images.

Note: This **SHARED TRIAL** database will be recreated periodically without warning, and all existing records will be overwritten and no longer retrievable. The **SHARED TRIAL** database should not be used to store any real or important medical data. Further, Carestream Dental is not liable for any loss **or unauthorized use** of data that occurs from this database.

Accessing the Software

To log in to the Sensei Cloud system:

- 1 Click <https://gosensei.us>. The **Sensei Cloud Welcome** window is displayed.

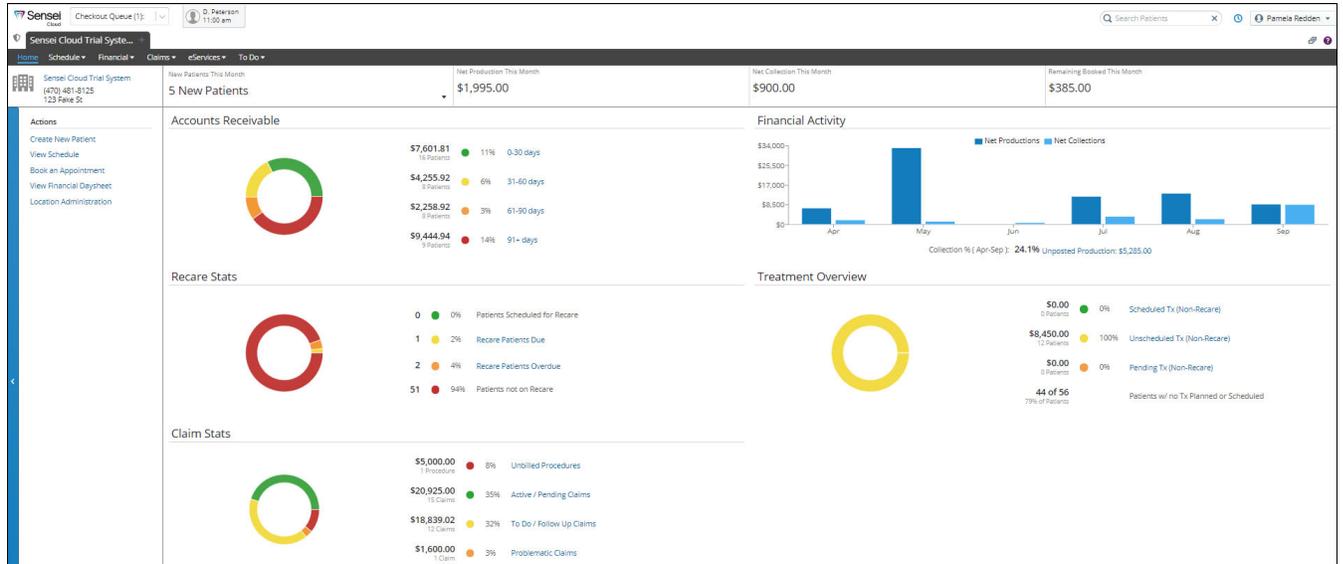
The image shows a screenshot of the Sensei Cloud login interface. At the top left is the Sensei Cloud logo, which consists of a stylized 'S' icon in purple and blue followed by the text 'Sensei Cloud'. Below the logo is the word 'Welcome'. There are two input fields: the first is labeled 'Email' with an envelope icon, and the second is labeled 'Password' with a lock icon. Below these fields is a purple button with the text 'SIGN IN'. At the bottom left of the form area, there is a small blue link that says 'Reset Password'.

- 2 In the **Email** field, type your email address.
- 3 In the **Password** field, type your password.
Note: If you have not set a password or have forgotten your password, click the **Reset Password** link.
- 4 Click **SIGN IN**.
- 5 If your office has more than one database, the **Database** window is displayed. Select the one you want to use and click **Get Started**.

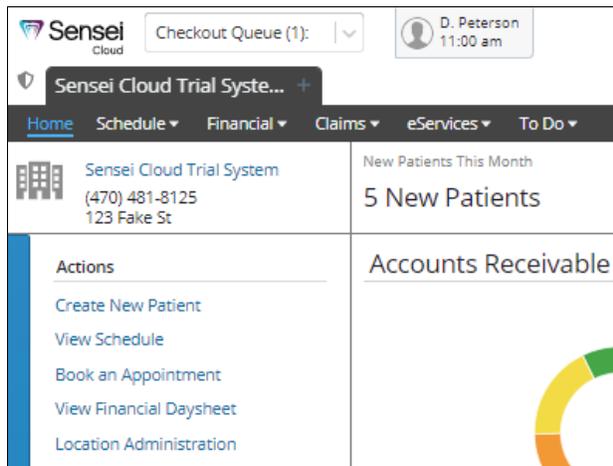
To exit the software, click the **X** in the upper-right corner of any window.

Using the Main Window

When you log in to the software, you see the **Sensei Cloud** main window, with the **Location** tab on the upper-left side of the screen and the **Search Patients** and **User** fields on the upper-right.



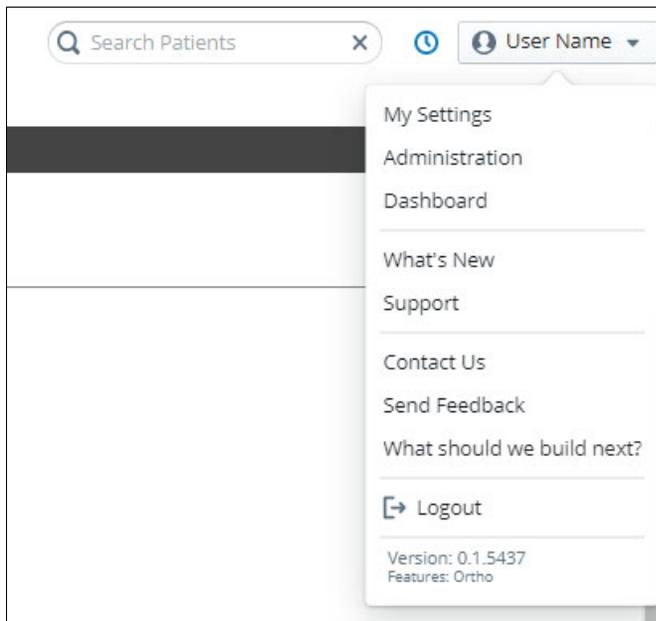
Left Side of the Window



The following fields, tabs, and icons are found on the left side of the window:

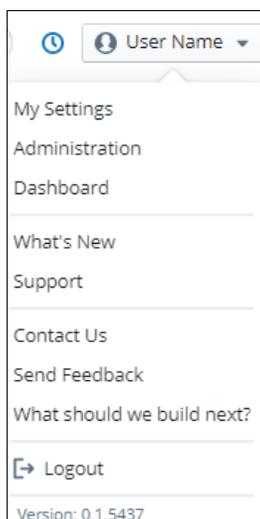
- **Queue** field—Click to display the **Waiting Queue** or the **Checkout Queue**.
- **HIPAA** icon —Click to enable or disable Privacy Mode.
- **Location** tab—Displays the practice name, with the practice phone number and address below it, under the menu bar. Click **+** on the **Location** tab to display other offices in the practice.
- **Menu** bar—Displays options you can click. These options vary depending on the tab you have open.
- **Actions** section—Displays options you can click. These options vary depending on the tab you have open.

Right Side of the Window



The following fields and icons are found on the right side of the window:

- **Search Patients** field—Enter identifying information, such as a patient's name, date of birth, address, or phone number. Click the patient's name to see a snapshot with additional information; click next to the name to select the patient.
- **Clock** icon—Click to clock in or clock out. This field is displayed only for hourly employees.
- **User** field—Displays your name. Click the name and a list is displayed:



- **My Settings**—Displays information about the staff member and a list of all staff members. You can create and edit staff member information.
- **Administration**—Displays information about the practice, if you have user permission. From the **Administration** tab, you can set up most of the functions of the practice.

- **Dashboard**—Gives you a quick look at the practice statistics, if you have user permission. From the **Dashboard** tab, you can run reports.
- **What's New**—Provides release notes on the Carestream Dental Exchange.
- **Support**—Enables you to search online help and opens a live chat dialogue box so you can speak directly to a Support representative during regular business hours.
- **Contact Us**—Provides a way for you to send a message to Carestream Dental and give general feedback, report a bug, or request support.
- **Send Feedback**—Provides another way for you to send a message to Carestream Dental and give general feedback, report a bug, or request support.
- **What should we build next?**—Provides a way for you to send your suggestions and ideas to Carestream Dental.
- **Logout**—Logs you out of the software.
- **Tab List** icon —Enables you to see a list of open tabs, close all patient tabs, or close all open tabs.
- **?** icon—Enables you to search online help and opens a live chat dialogue box so you can speak directly to a Support representative during regular business hours.

Tip: Within each area of Sensei Cloud, some of the displayed information is also a link. Hover the cursor over an item; if it changes from an arrow to a finger, you can click there for more details and options.

Related Documentation

See the *Sensei Cloud Configuration Guide* (CM100) and the Sensei Cloud Online Help for more information.

1 Adding Patients

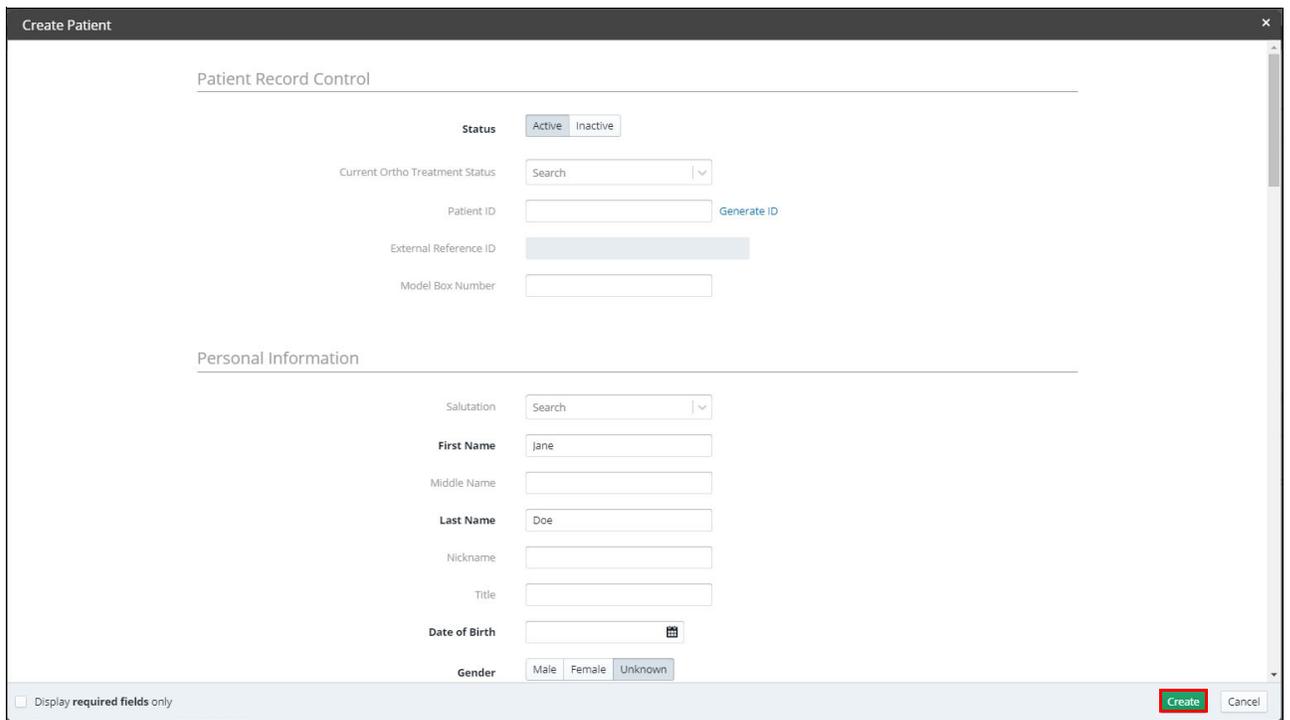
This lesson contains the following topics:

- [Adding New Patients](#)
- [Editing Patient Records](#)
- [Adding Patient Portraits or Avatars](#)

Adding New Patients

To add a new patient record:

- 1 In the location's **Home** view, search for the patient in the **Search Patients** field, and make sure he or she is not in the database already.
- 2 Under **Actions**, click **Create New Patient**. The **Create Patient** window is displayed.



The screenshot shows the 'Create Patient' window with the following fields and options:

- Patient Record Control**
 - Status: Active (selected), Inactive
 - Current Ortho Treatment Status: Search (dropdown)
 - Patient ID: [text input] Generate ID (button)
 - External Reference ID: [text input]
 - Model Box Number: [text input]
- Personal Information**
 - Salutation: Search (dropdown)
 - First Name: Jane
 - Middle Name: [text input]
 - Last Name: Doe
 - Nickname: [text input]
 - Title: [text input]
 - Date of Birth: [calendar icon]
 - Gender: Male, Female, Unknown

At the bottom left, there is a checkbox for 'Display required fields only'. At the bottom right, there are 'Create' and 'Cancel' buttons.

- 3 In the **Patient Record Control** section, verify that the patient is **Active** and generate an ID.
- 4 Scroll down and enter the following information:
 - Personal
 - Contact
 - Portrait

- Additional information, such as the school the patient attended
- Patient referrals
- Responsible parties
- Insurance
- Connected patients
- Patient preferences
- Recare appointments
- Medical alerts, if any

Note: Required fields are displayed in bold.

- 5 Add a note, if necessary.
- 6 Click **Create**.

Editing Patient Records

To edit a patient record:

- 1 In the patient's **Home** view, click the **Patient Record** tab. The **Patient Record** for window is displayed.

The screenshot shows the 'Patient Record' window for a patient named 'test smith'. The navigation menu on the left includes 'Actions', 'Jump To', and various record categories. The 'Edit Patient Record' option is highlighted with a red box. The main content area is divided into two sections: 'Patient Record Control' and 'Personal Information'.

Patient Record Control	
Status	Active
Patient Since	No Patient Appointment History
Last Seen	No Patient Appointment History

Personal Information	
First Name	test
Last Name	smith
Date of Birth	06/01/1994 26 years old
Gender	Male
Ethnicity	Unknown

- 2 Under **Actions**, click **Edit Patient Record**.
- 3 Under **Jump To**, select the information you want to edit, **OR** use the scrollbar to find the information you want to edit.
- 4 Edit the record.
- 5 Click **Save Patient**.

Note: You cannot delete a patient record, but you can mark it **Inactive** in the **Patient Record Control** section. To move the record to the bottom of the patient list, add **ZZZ** to the beginning of the last name; for example, **ZZZTest**.

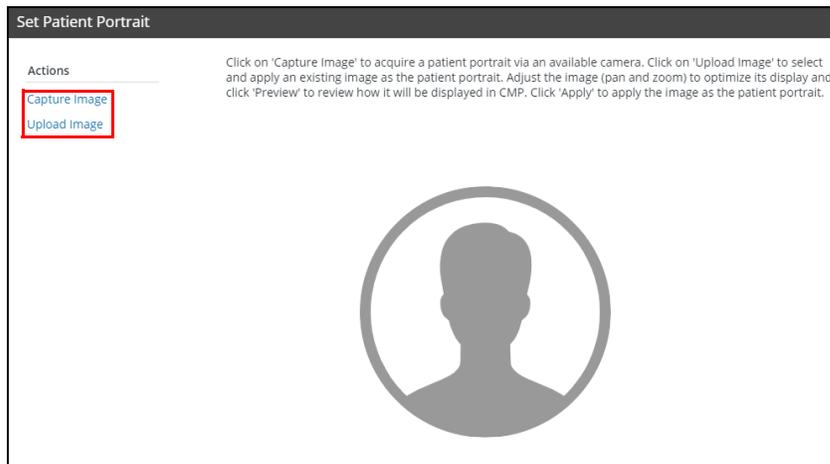
Adding Patient Portraits or Avatars

You can add a portrait or avatar as you create a new patient record or at a later date.

When You Create a Patient Record

To add a patient's portrait or avatar:

- 1 In the **Portrait** section, click **Add portrait**. The **Set Patient Portrait** window is displayed.

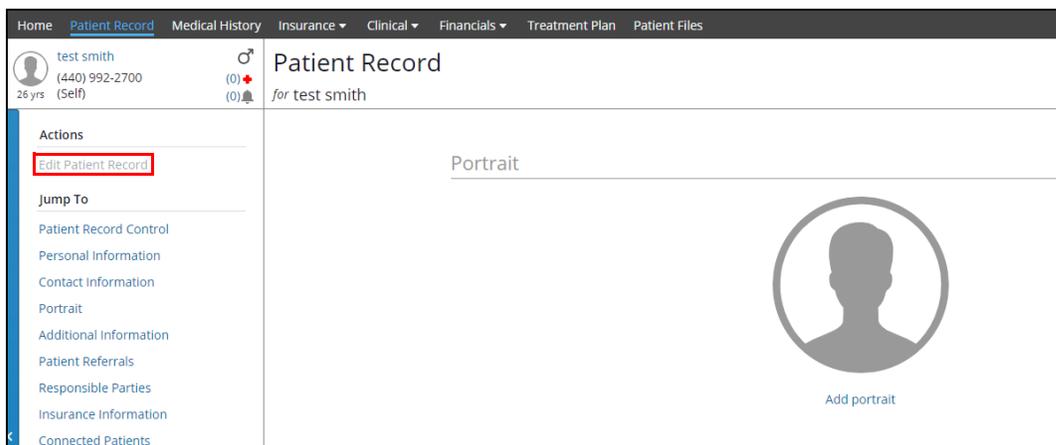


- 2 Click one of the following:
 - **Capture Image**—When the camera is ready, click **Take Photo**.
 - **Upload Image**—Select the image you want to upload and click **Open**.
- 3 Use the controls to adjust the image, and then click **Preview**.
- 4 When you are satisfied with the image, click **Apply**.

When You Edit a Patient Record

To add a patient's portrait or avatar:

- 1 In the **Patient's Home** view, click the **Patient Record** tab. The **Patient Record** window is displayed.



- 2 Under **Actions**, click **Edit Patient Record**.
- 3 Under **Jump To**, click **Portrait**.
- 4 Under the portrait placeholder, click **Add portrait**. The **Set Patient Portrait** window is displayed.
- 5 Under **Actions**, click one of the following:
 - **Capture Image**—When the camera is ready, click **Take Photo**.
 - **Upload Image**—Select the image you want to upload and click **Open**.
- 6 Use the controls to adjust the image, and then click **Preview**.
- 7 When you are satisfied with the image, click **Apply**.
- 8 When you have finished editing the patient record, click **Save Patient** at the bottom of the window.

Tip: To access the **Set Patient Portrait** window from a patient's mini-card, click .

Adding Notes

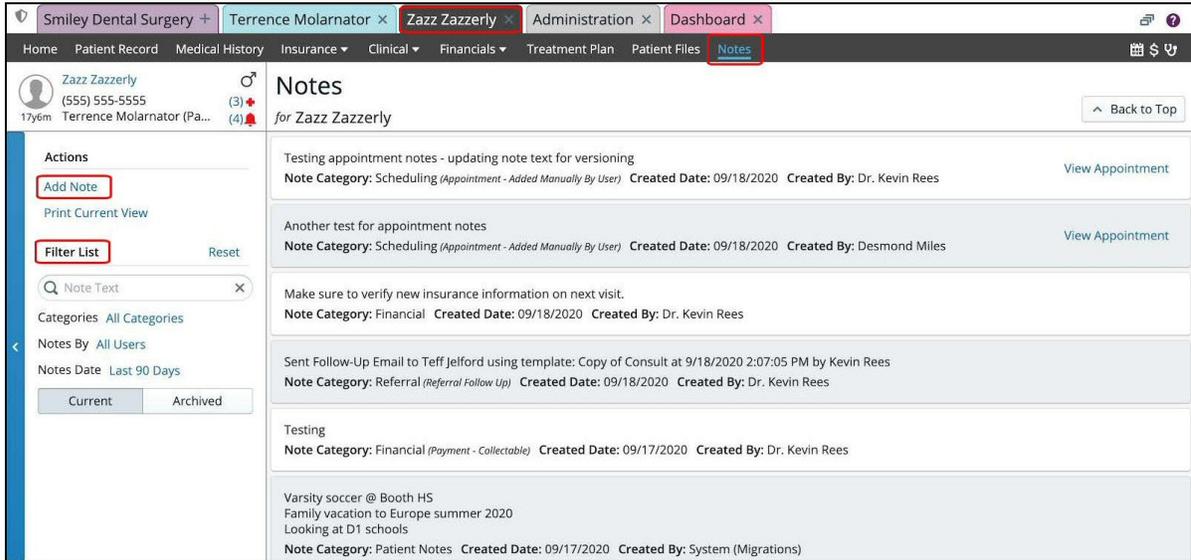
The **Notes** window lists all existing non-clinical notes that have been added to the patient account. Use this list to search for specific items by note text, or filter the list based on the note's category, author, or date. You can also print a patient's notes, generating a **.PDF** file of a patient's current notes.

The list of notes includes:

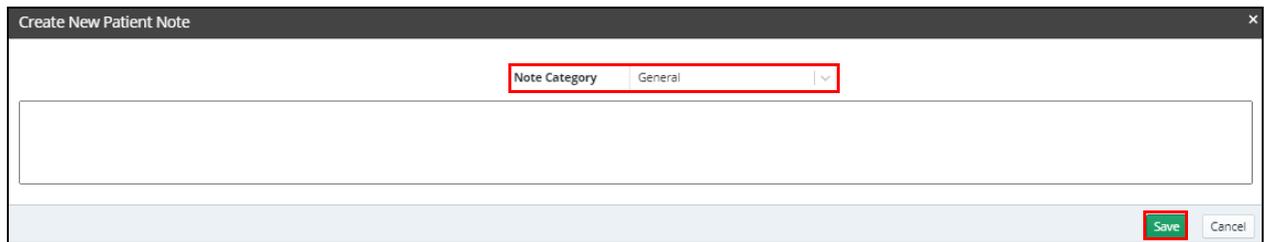
- Notes added in the **Appointment Card** when you schedule an appointment
- Notes entered when you cancel an appointment in the Day View of the Schedule
- Contact notes added when you manage appointments through a scheduled work list, such as the Pending list
- Comments added when you post a financial transaction to the Patient Ledger
- Automatic system notes created when you send correspondence to a referral source via the Referral Follow-Up list
- Automatic system notes created when you send recall reminders from the Recare list
- Text added to the **Patient Notes** field in the patient's record

To add free-text notes to a patient's record:

- 1 Find the patient. The patient's **Home** page is displayed.



- 2 Click **Add Note**. The **Create New Patient Note** window is displayed.



- 3 From the **Category** drop-down list, select a category:

- **General** (default)
- **Medical**
- **Financial**
- **Scheduling**
- **Referral**

- 4 Enter comments in the text field.

- 5 Click **Save**. The note appears in the **Notes** list for the patient.

Note: While you must assign a category when creating free-text notes manually, notes created from other workflow interfaces are automatically assigned a category.

Editing Notes

To edit a note, select it and click the **Pencil** icon. Notes that cannot be edited—such as system notes—display a **Lock** icon instead of a **Pencil**.

Tip: A revision history is maintained.

Skill Sharpeners

Exercise 1—A new patient by the name of John Smith calls to schedule an appointment. Add the required information and create a new patient record.

To add a new patient:

- 1 On the **Home** tab, in the **Search Patients** field, search for John Smith and make sure he is not in the database already.
- 2 Under **Actions**, click **Create New Patient**. The **Create Patient** window is displayed.
- 3 In the **Patient Record Control** section, make sure the patient is **Active**.
- 4 Ask the patient for required information on the phone and enter it in the following fields:
 - **First Name**
 - **Last Name**
 - **Date of Birth**
 - **Gender**
 - **Mobile Phone Number**
- 5 Select the **Is Self-Responsible** option.
- 6 In the **Preferred Location** field, select the location from the drop-down list.
- 7 In the **Preferred Doctor** field, select a name from the drop-down list.
- 8 In the **On Recare List** field, select **Yes**.
- 9 Select the **Use Practice Defaults** option.
- 10 Click **Create Patient**.

Exercise 2—Mr. Smith arrives at his first appointment, and you want to edit his patient record to add more information.

To edit a patient record:

- 1 In the **Search Patients** field, enter **John Smith**. The patient's **Home** window is displayed.
- 2 Click the **Patient Record** tab. The **Patient Record** window is displayed.
- 3 Under **Actions**, click **Edit Patient Record**.
- 4 Click **Generate ID**.
- 5 Under **Jump To**, do the following:
 - Click **Contact Information** and enter addresses in the email and street address fields.
 - Click **Insurance Information** and then **Add Insurance Policy**. Fill in the insurance information and click **Create**.
 - Click **Medical Alerts** and add **High Blood Pressure** as a medical alert.
- 6 Click **Save Patient**.

Exercise 3—Add and edit a note to John Smith’s patient record that reads “Patient takes medication for high blood pressure.”

To add and edit a note:

- 1 In the **Search Patients** field, enter **John Smith**. The patient’s **Home** window is displayed.
- 2 Click the **Notes** tab. The **Note** window is displayed.
- 3 Under **Actions**, click **Add Note**. The **Create New Note** window is displayed.
- 4 From the drop-down list in the **Category** field, select **Medical**.
- 5 Type **Patient takes medication for blood pressure**.
- 6 Click **Save**.
- 7 Hover the cursor on the note and then click the **Pencil** icon to the far right of the window. The **Edit Existing Patient Note** window is displayed.
- 8 Type **high** before **blood pressure**.
- 9 Click **Save**.

2 Scheduling Patients

This lesson contains the following topics:

- [Scheduling New Appointments](#)
- [Scheduling Treatment Plan Appointments](#)
- [Scheduling Teledentistry Appointments](#)
- [Confirming Appointments](#)
- [Rescheduling Appointments](#)
- [Cancelling Appointments](#)
- [Using the Shortcall List](#)
- [Printing the Schedule](#)

Scheduling New Appointments

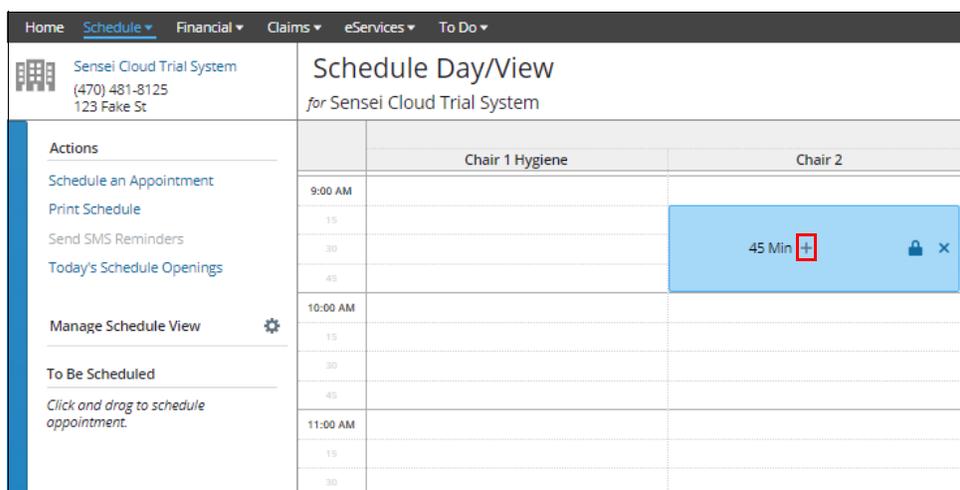
You can schedule appointments from the following locations:

- Schedule Day/View
- **Patient** tab
- Location's **Home** window
- Existing appointment

From the Schedule Day/View

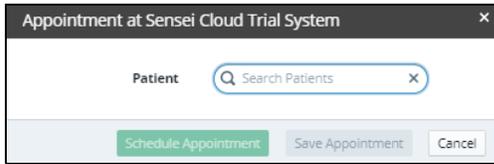
To schedule an appointment:

- 1 Find a date and time on the Schedule and click-and-drag the length of the appointment.

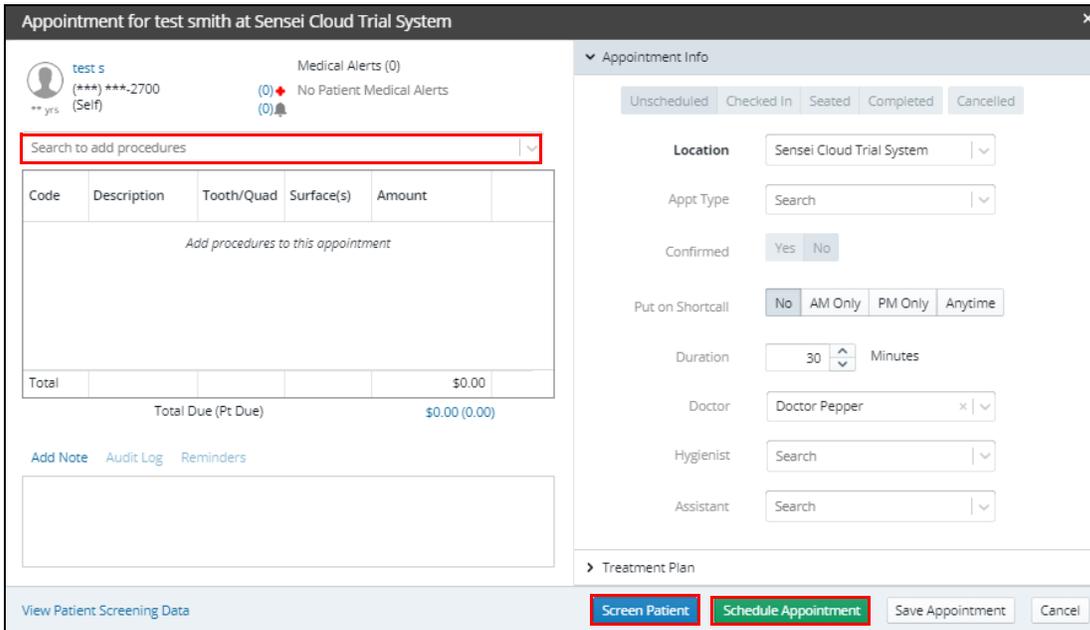


- 2 Click the + next to the duration time.

The **Search Patients** field is displayed.



- 3 Find and select the patient's name. The **Appointment for** window is displayed.



- 4 From the **Search for procedures** drop-down list, select the procedures.
- 5 In the **Appointment Info** section, verify or select the appropriate information in the fields.
- 6 To screen the patient for COVID-19 symptoms, click **Screen Patient**, have the patient answer the questions, and click **Save Changes**. See "[Screening Patients](#)" for more information.
- 7 Click **Schedule Appointment**. The Schedule displays the appointment.

From the Patient Tab

To schedule an appointment:

- 1 On a patient's tab, click **Home**. The patient's **Home** window is displayed.

The screenshot shows the patient's Home window for Sebastian Bach. The top navigation bar includes Home, Patient Record, Medical History, Insurance, Clinical, Financials, Treatment Plan, Patient Files, and Notes. The patient's name, age (52 yrs), and contact information are displayed. A Patient Balance of \$5,350.00 is shown with a note that an Aged Balance Exists. The Treatment Plan section indicates 2 items, with 1 pending and 1 scheduled. The Actions menu on the left has 'Schedule an Appointment' highlighted with a red box. The patient's personal information, including DOB, mobile, email, and address, is listed. The Appointments section shows a table of recent appointments.

Appt. Status	Appt Info
Scheduled	Tuesday, June 2, 2020 at 09:45 am in Chair 1 Hygiene at Sensei Cloud Trial System
Checked Out	Monday, June 1, 2020 at 08:00 am in Chair 2 at Sensei Cloud Trial System
Checked Out	Friday, May 29, 2020 at 01:30 pm in Chair 2 at Sensei Cloud Trial System
Checked Out	Wednesday, May 27, 2020 at 05:30 pm in Chair 1 Hygiene at Sensei Cloud Trial System

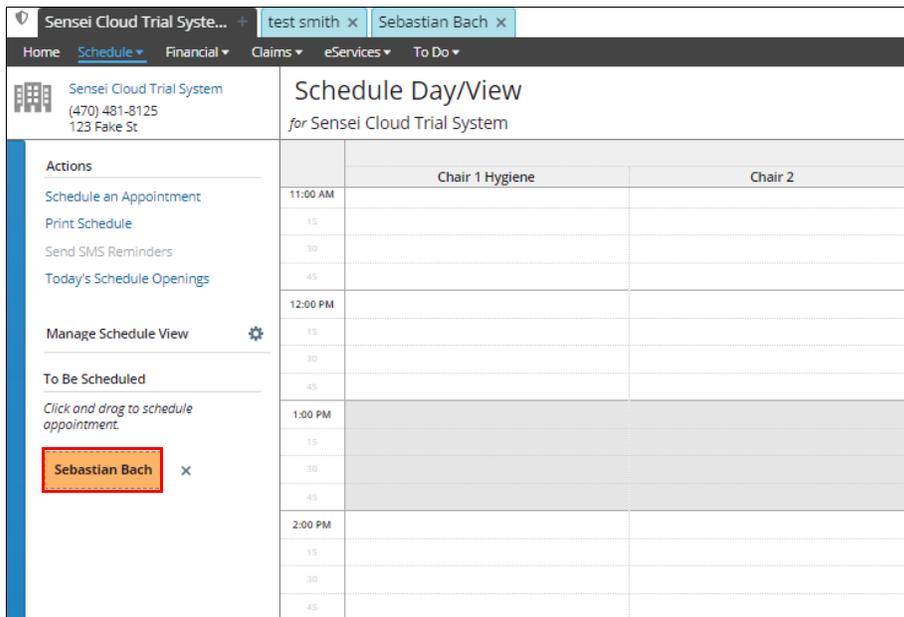
- 2 Under **Actions**, click **Schedule an Appointment**. The **Appointment** for window is displayed.

The screenshot shows the Appointment for Sebastian Bach window. The patient's information is repeated at the top. A search box for procedures is highlighted with a red box. Below it is a table of procedures. The Appointment Info section on the right contains various fields for scheduling, including location, appt type, confirmed status, duration, and staff selection. The 'Schedule Appointment' button at the bottom is highlighted with a red box.

Code	Description	Tooth/Quad	Surface(s)	Amount
D0220	intraoral - periapical first radiographic image			\$0.00
Total				\$0.00
Total Due (Pt Due)				\$0.00 (\$0.00)

- 3 From the **Search to add procedures** drop-down list, add procedures.
- 4 In the **Appointment Info** section, verify or select the appropriate information in the fields.

- Click **Schedule Appointment**. The Schedule is displayed.

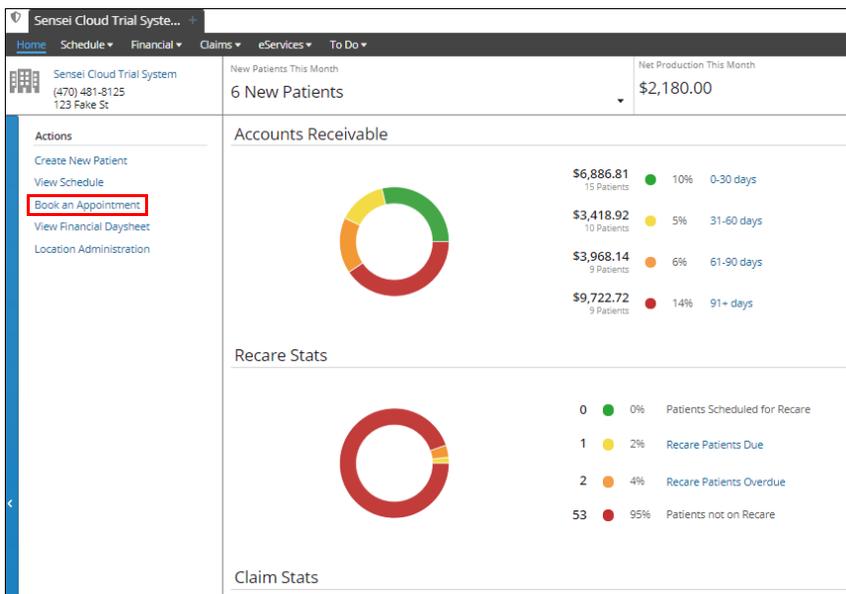


- Find a time slot in the Schedule.
- Click-and-drag the appointment from the left side of the window to the time slot.

From the Location's Home Window

To schedule an appointment:

- On the **Location** tab, click **Home**. The location's **Home** window is displayed.



- Under **Actions**, click **Book an Appointment**. The **Search Patients** field is displayed.

- Find and select the patient. The **Appointment for** window is displayed.

Appointment for Sebastian Bach at Sensei Cloud Trial System

Sebastian B
 (***) (***)-9852 (Self)
 ** yrs

Medical Alerts (0)
 (0) No Patient Medical Alerts (0)

Search to add procedures

Code	Description	Tooth/Quad	Surface(s)	Amount
Add procedures to this appointment				
Total				\$0.00
Total Due (Pt Due)				\$0.00 (0.00)

Add Note Audit Log Reminders

Appointment Info

Unscheduled Checked In Seated Completed Cancelled

Location: Sensei Cloud Trial System

Appt Type: Search

Confirmed: Yes No

Put on Shortcall: No AM Only PM Only Anytime

Duration: 30 Minutes

Doctor: Doctor Pepper

Hygienist: Search

Assistant: Search

Treatment Plan

View Patient Screening Data

Screen Patient **Schedule Appointment** Save Appointment Cancel

- From the **Search to add procedures** drop-down list, add procedures.
- In the **Appointment Info** section, verify or select the appropriate information in the fields.
- Click **Schedule Appointment**. The Schedule is displayed.

Sensei Cloud Trial System
 (470) 481-8125
 123 Fake St

Schedule Day/View
 for Sensei Cloud Trial System

Actions

- Schedule an Appointment
- Print Schedule
- Send SMS Reminders
- Today's Schedule Openings

Manage Schedule View

To Be Scheduled

Click and drag to schedule appointment.

Sebastian Bach x

	Chair 1 Hygiene	Chair 2
11:00 AM		
15		
30		
45		
12:00 PM		
15		
30		
45		
1:00 PM		
15		
30		
45		
2:00 PM		
15		
30		
45		

- Find a time slot in the Schedule.
- Click-and-drag the patient's appointment from the left side of the window to the time slot.

From an Existing Appointment

To schedule an appointment:

- 1 In the Schedule, click the appointment to display the **Appointment Details** window.

The screenshot shows the 'Appointment Details' window for Sebastian Bach. The title bar reads 'Appt for Sebastian Bach at 11:00 am (45 min) at Sensei Cloud Trial System'. The window includes a navigation bar with options: Clinical, Reschedule, Cancel, Confirm, Check In, Screen Patient, and Send SMS Reminder. Patient information includes a profile icon, name 'Sebastian Bach', phone '(770) 452-9852', and age '.52 yrs (Self)'. Medical Alerts are listed as '(0) No Patient Medical Alerts'. A 'View Patient Screening Data' link is present. A table displays appointment details: Location (Sensei Cloud Trial System), Time (Oct 28, 2020 (45 mins)), Appt Type, Model Box (Medicaid), Chair (Chair 1 Hygiene), Providers (DP), Total (Pt Due): \$0.00 (\$0.00), and Pat Bal: \$5,350.00. A 'Procedure List' section shows 'D0210 - Intraoral - complete series of radiographic images'. A 'Latest Note' section contains the text: 'Patient screening form skipped / not collected - Wed, Sep 23, 2020 1:41 PM by Pamela Redden'. A red box highlights the 'Copy' icon in the top right corner.

- 2 Click the **Copy Appointment**  icon. The **Appointment for** window is displayed.

The screenshot shows the 'Appointment for' window for test smith. The title bar reads 'Appointment for test smith on Tue, Oct 20, 2020 8:45 AM at Sensei Cloud Trial System in Chair 3'. The window includes a navigation bar with options: Scheduled, Checked In, Seated, Completed, and Cancelled. Patient information includes a profile icon, name 'test smith', phone '(440) 992-2700', and age '26 yrs (Self)'. Medical Alerts are listed as '(1) Screening Risk'. A search bar for adding procedures is present. A table displays appointment details: Code, Description, Tooth/Quad, Surface(s), Amount, and Total Due (Pt Due) \$0.00 (0.00). A 'Treatment Plan' section is visible. A 'Copy as New Appt' button is highlighted with a red box. Other buttons include 'Screen Patient', 'Update Appointment', 'Reschedule', and 'Cancel'. A 'Latest Note' section contains the text: 'Patient screening form skipped / not collected - Tue, Oct 20, 2020 10:47 AM by Pamela Redden'.

- 3 Modify the appointment details, as needed.
- 4 Click **Schedule Appointment**.
- 5 Find a time slot in the Schedule.
- 6 Click-and-drag the patient's appointment from the left side of the window to the time slot.

Editing an Appointment

To edit an appointment:

- 1 In the Schedule, click the appointment to display the **Appointment Details** window.

The screenshot shows the 'Appointment Details' window for 'Cookie Doe' at 'Sensei Cloud Trial System'. The window title is 'Appt for Cookie Doe at 03:45 pm (60 min) at Sensei Cloud Trial System'. At the top, there are navigation buttons: Clinical, Reschedule, Cancel, Confirm, Check In, Screen Patient, and Send SMS Reminder. Below this, the patient's name 'Cookie Doe' is displayed with a profile icon, phone number '(614) 291-9981', and age '48 yrs (Self)'. To the right, there are medical alert indicators: 'Medical Alerts (0)', 'No Patient Medical Alerts (0)', and a bell icon. A link 'View Patient Screening Data' is present. A table displays appointment details: Location (Sensei Cloud Trial System), Time (Sep 14, 2020 (60 mins)), Appt Type, Model Box (N/A), Chair (Chair 2), Providers (DP), Total (Pt Due): \$0.00 (0.00), and Pat Bal: \$0.00. Below the table is a 'Procedure List' section and a 'Latest Note' section containing the text: 'Patient screening form skipped / not collected - Mon, Sep 14, 2020 3:44 PM by Pamela Redden'. In the top right corner, there is a pencil icon for editing.

- 2 Click the **Pencil** icon in the upper-right corner. The appointment information is displayed.
- 3 Edit the following fields, as necessary:
 - **Appointment Status**
 - **Confirmed**
 - **Appointment Duration**
 - **Doctor, Hygienist, Assistant**
 - **Appt Type**
 - **Procedures**
 - **Note**
 - **Treatment Plan**
- 4 Click **Update Appointment**.

Adding a Note to an Appointment

To add a note:

- 1 In the **Appointment** for window, click **Add Note**.

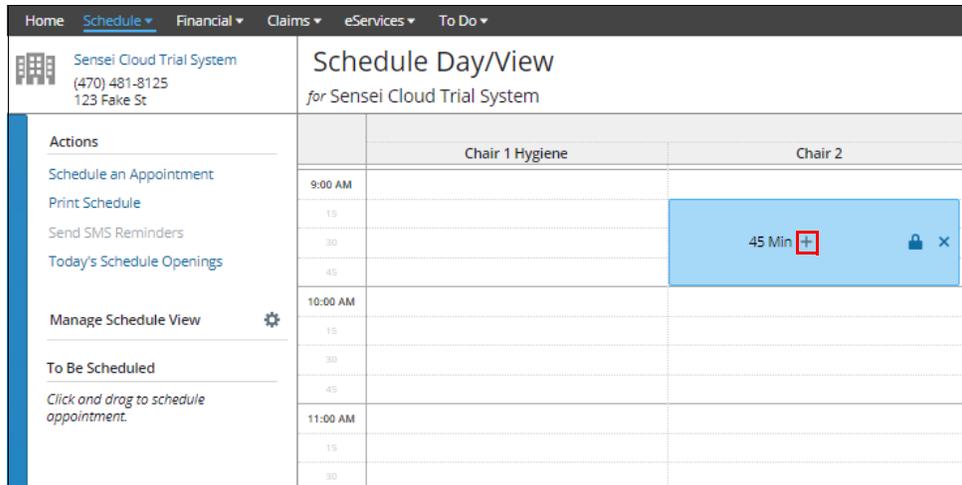
The screenshot shows the 'Appointment' window for 'Clark Moore' at 'Sensei Cloud Trial System'. The window title is 'Appointment for Clark Moore at Sensei Cloud Trial System'. At the top, there are navigation buttons: Clinical, Reschedule, Cancel, Confirm, Check In, Screen Patient, and Send SMS Reminder. Below this, the patient's name 'Clark Moore' is displayed with a profile icon, phone number '(919) 425-1135', and age '30 yrs (Self)'. To the right, there are medical alert indicators: 'Medical Alerts (0)', 'No Patient Medical Alerts (0)', and a bell icon. A search bar 'Search to add procedures' is present. Below the search bar is a table with columns: Code, Description, Tooth/Quad, Surface(s), and Amount. The table contains the text 'Add procedures to this appointment'. At the bottom of the table, there is a 'Total' row with a value of '\$0.00' and a 'Total Due (Pt Due)' row with a value of '\$0.00 (0.00)'. Below the table is an 'Add Note' button, which is highlighted with a red box. To the right of the 'Add Note' button are links for 'Audit Log' and 'Reminders'. On the right side of the window, there is an 'Appointment Info' panel with tabs: 'Unscheduled', 'Checked In', 'Seated', 'Completed', and 'Cancelled'. The 'Unscheduled' tab is selected. The panel contains fields for: Location (Sensei Cloud Trial System), Appt Type (Search), Confirmed (Yes/No), Put on Shortcall (No/AM Only/PM Only/Anytime), Duration (30 Minutes), Doctor (Doctor Pepper), Hygienist (Search), and Assistant (Search). At the bottom of the window, there are buttons for 'Screen Patient', 'Schedule Appointment', 'Save Appointment', and 'Cancel'.

- 2 In the **Note** field, type the note and press **Enter**.

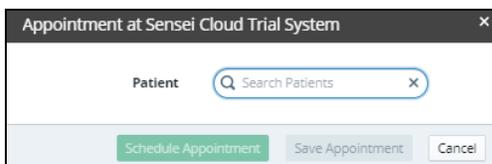
Scheduling Treatment Plan Appointments

To schedule a treatment plan appointment:

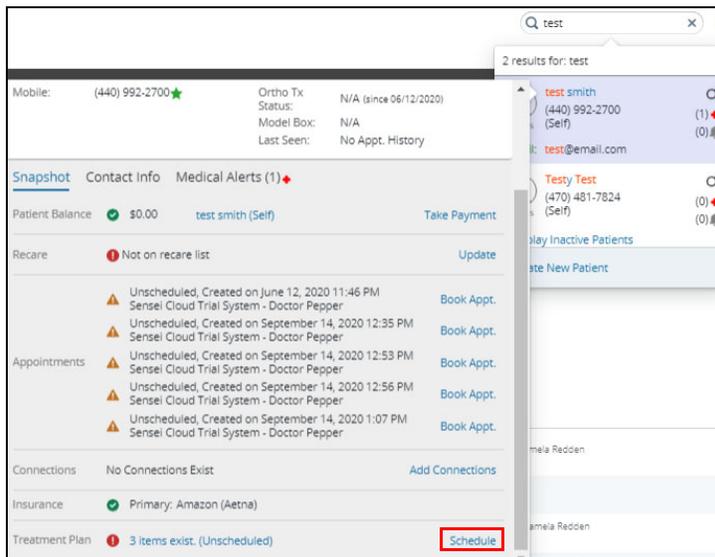
- 1 Find a date and time on the Schedule and click-and-drag the length of the appointment.



- 2 Click the + next to the duration time. The **Search Patients** field is displayed.

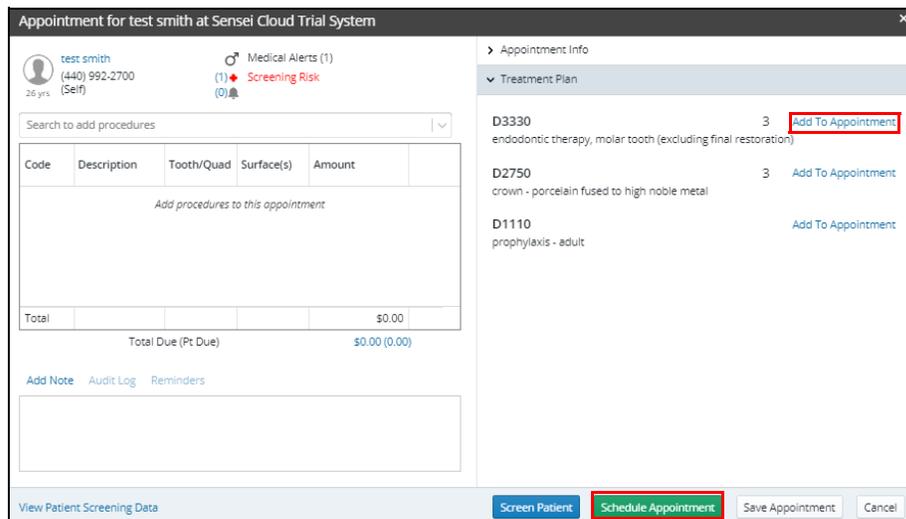


- 3 Find and click the patient's name. The patient's **Snapshot** is displayed.



- 4 Scroll down until you see **Treatment Plan** and click **Schedule**.

The **Appointment for** window shows the procedures that have been added to the treatment plan.



- 5 Click **Add To Appointment** next to the procedure you want to schedule.
- 6 Click **Schedule Appointment**. The Schedule displays the appointment.

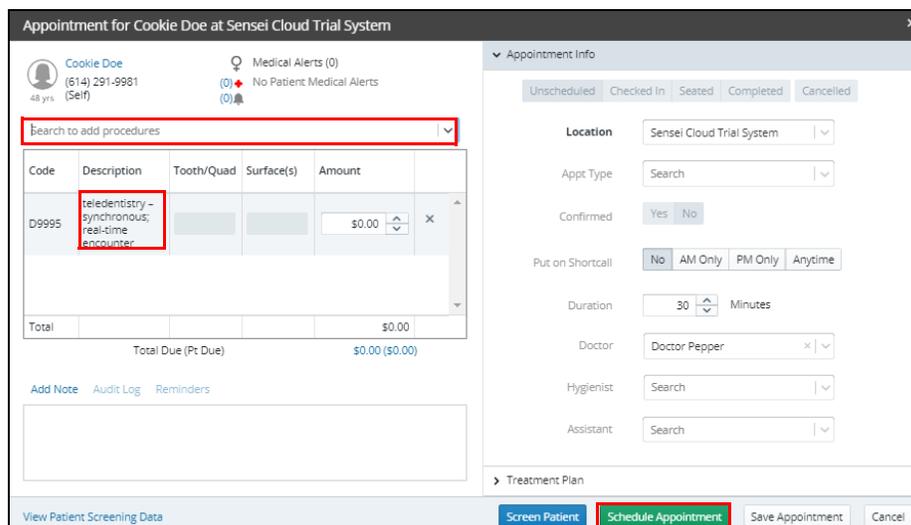
Scheduling Teledentistry Appointments

Sensei Cloud integrates with Microsoft Teams™, enabling you to schedule and launch live teledentistry consultations from your Schedule. If your practice uses Microsoft 365™, you can enroll in Carestream Dental's teledentistry solution. Once the teledentistry feature is configured, you can create online meetings as part of the appointment booking process.

When a teledentistry appointment is booked, an email is sent to the patient confirming the appointment, with a **Join Session** link. By clicking the link, the patient enters the virtual lobby for the online appointment, where you can admit them to begin the consultation.

To schedule an appointment:

- 1 Find the patient and begin scheduling the appointment. The **Appointment for** window is displayed.



- From the **Search to add procedures** drop-down list, select the **Teledentistry** option.
- Select the appropriate procedure codes and enter the appropriate information.
- In the **Appointment Info** section, verify or enter the appropriate information.
- Click **Schedule Appointment**. You are prompted to either log in or confirm your Office 365 account.
- Click **Continue** and verify your credentials. The appointment is noted on the Schedule with teledentistry indicators.

Note: A confirmation email is sent to the patient with a link to the appointment.

When the appointment time arrives, the link to the **Appointment Card** is activated. Click **Start Online Meeting**. Microsoft Teams opens the meeting.

See the Sensei Cloud Online Help for more information.

Confirming Appointments

You can confirm an appointment from the **Confirmation List** and on a patient's **Appointment Details** window.

From the Confirmation List

To confirm an appointment:

- On the **Location** tab, select **Schedule > Confirmation List**. The appointments that need to be confirmed are displayed.
- Use the filters on the left to choose the appointments that you want to confirm. You can filter by the provider, appointment's production value, duration, and number of days prior to appointment.
- Select the appointment you want to confirm. Information about the appointment is displayed.

The screenshot shows a 'Confirmation List' window with the following details:

- Patient:** test-smith (440) 992-2700 (Mobile)
- Date / Time:** Tue, Oct 20 at 8:45 am (45 minutes)
- Location / Chair:** Sensei Cloud Trial System / Chair 3
- Medical Alerts:** (1) Screening Risk
- Procedures:** (Empty)
- Notes:** Add Note, Patient screening form sk, Tue, Oct 20, 2020 10:47 AM
- Buttons:** Confirm (highlighted in red), Reschedule, Cancel Appt., Send SMS Reminder

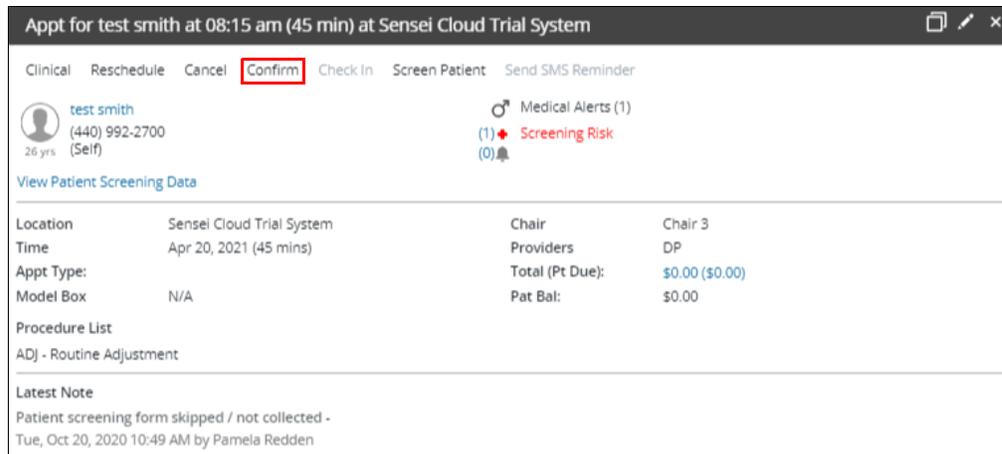
- Click **Confirm**. Confirmed appointments are displayed on the Schedule with a dark blue triangle in the upper-right corner of the appointment.

The screenshot shows an appointment card for 'William' with ID 'D0140'. A dark blue triangle is visible in the upper-right corner, and a red '2+' icon is in the bottom right corner.

From the Appointment Details Window

To confirm an appointment:

- 1 Click the appointment. The **Appointment Details** window is displayed.



- 2 Click **Confirm**.
- 3 Close the **Appointment Details** window.

Rescheduling Appointments

You can click-and-drag an appointment to another time slot on the Schedule, or you can reschedule an appointment in the **Appointment Details** window or from the **Pending List**.

Click-and-Drag an Appointment

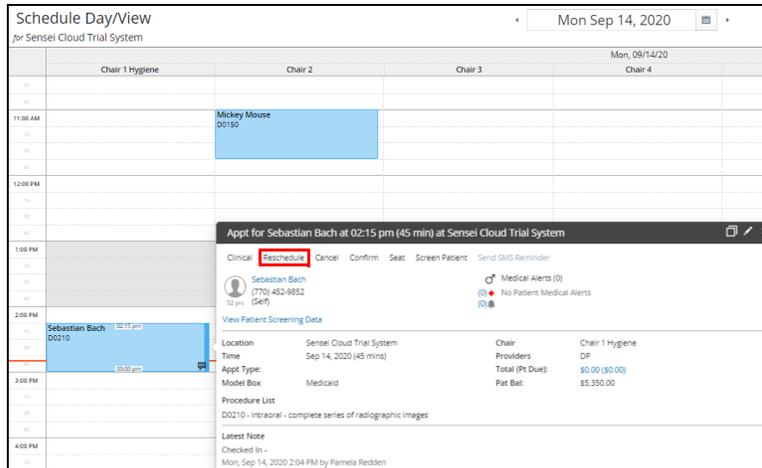
To reschedule an appointment:

- 1 Click-and-drag the appointment to the **Actions** section of the Schedule. The appointment is listed under **To Be Scheduled**.
- 2 Find the new appointment date.
- 3 Click-and-drag the patient's appointment to the new time slot.

From the Appointment Details Window

To reschedule an appointment:

- 1 On the Schedule, click the appointment. The **Appointment Details** window is displayed.

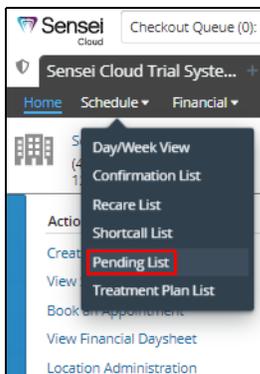


- 2 Click **Reschedule**. The appointment is listed in the **To Be Scheduled** section under **Actions** in the Schedule.
- 3 Find the new appointment date.
- 4 Click-and-drag the patient's name to the new time slot.

From the Pending List

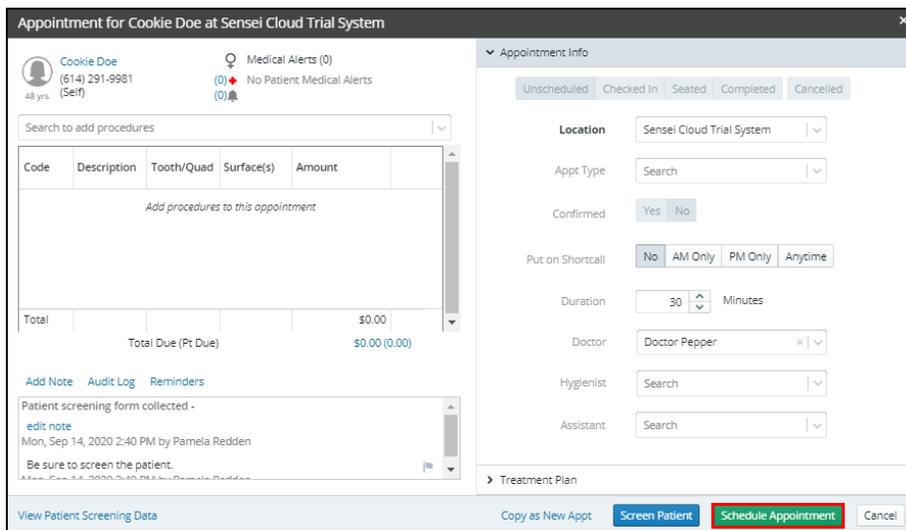
To reschedule an appointment:

- 1 In the location's **Home** window, click **Schedule**. A list is displayed.



- 2 Select **Pending List**. The **Appointment Pending List** is displayed.
Note: You can apply filters, if necessary, to locate the appointment you are rescheduling.
- 3 Click the pending appointment. The appointment information is displayed.

- 4 Click **Reschedule**. The **Appointment Card** for the patient is displayed.



- 5 Click **Schedule Appointment**. The Schedule is displayed.
- 6 Find the new appointment date.
- 7 Click-and-drag the patient's appointment from the **To Be Scheduled** section to the new time slot.

Canceling Appointments

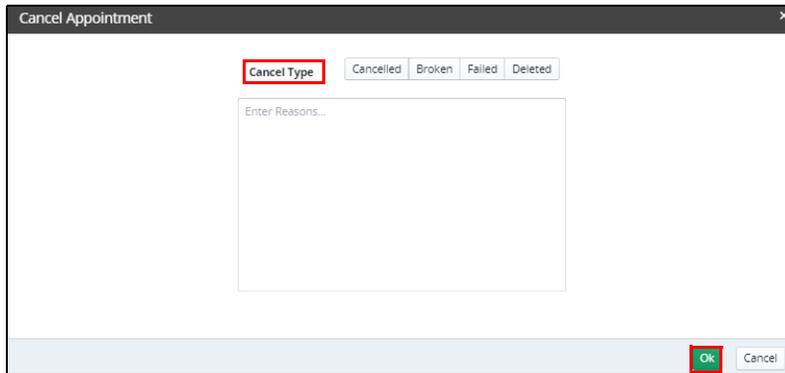
To cancel an appointment:

- 1 Click the appointment. The **Appointment Details** window is displayed.



- 2 Click **Cancel**.

The **Cancel Appointment** window is displayed.



3 Select from the **Cancel Type** list:

- **Cancelled**—Appointment is cancelled more than 24 hours before the appointment date.
- **Broken**—Appointment is broken less than 24 hours before the appointment date.
- **Failed**—Patient failed to show up for the appointment.
- **Delete**—Appointment is removed from the Schedule.

Note: Cancelled, broken, and failed appointments are placed on the Pending List.

4 In the **Reason** field, type the reason for the cancellation.

5 Click **OK**.

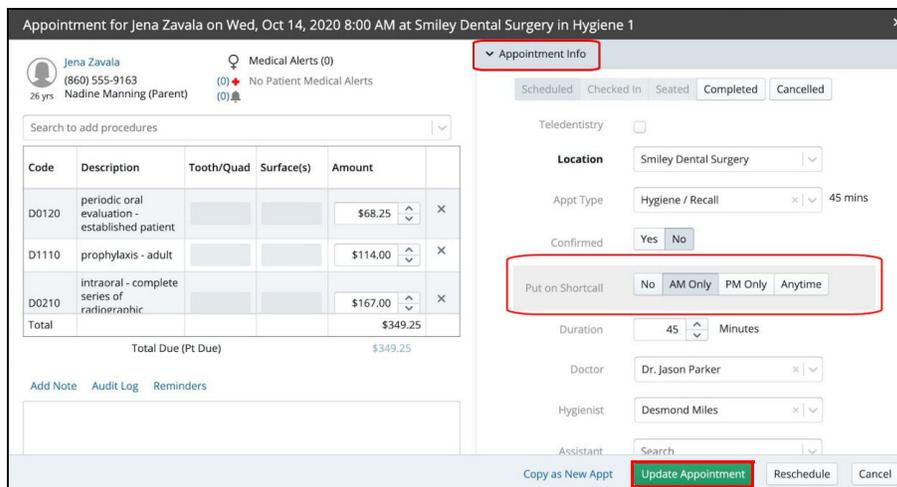
Using the Shortcall List

The Shortcall list enables you to rebook scheduled appointments for an earlier date and time. Use this list to fill a cancellation or open slot in your schedule. To view the list, on the **Location** tab, select **Schedule > Shortcall List**.

Adding an Appointment

To add an appointment to the Shortcall list:

1 On the **Appointment Card**, expand the **Appointment Info** section.

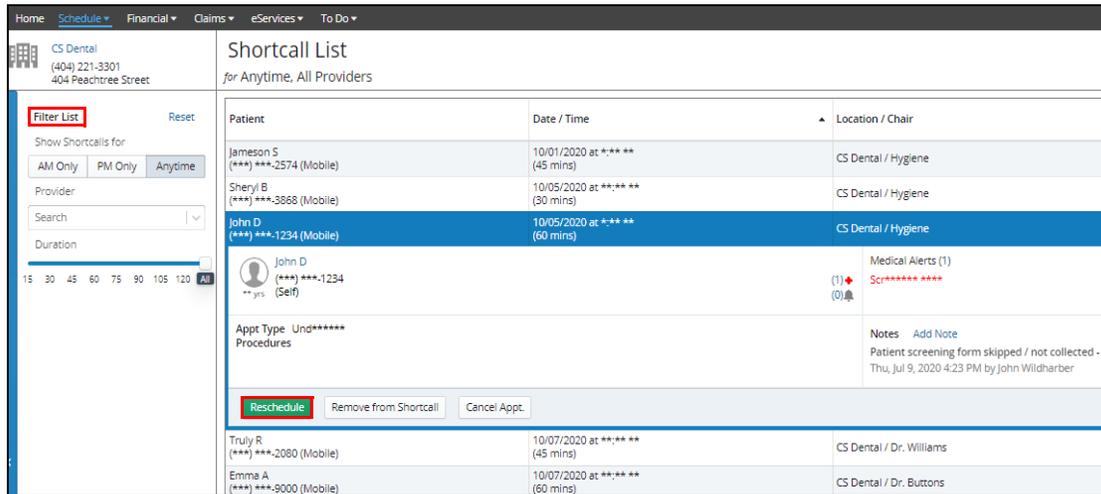


- 2 In the **Put on Shortcall** field, select **AM Only**, **PM Only**, or **Anytime**.
- 3 Click **Update Appointment**.

Rescheduling an Appointment on the Shortcall List

To reschedule an appointment:

- 1 On the **Location** tab, select **Schedule > Shortcall List**. The **Shortcall List** window is displayed.



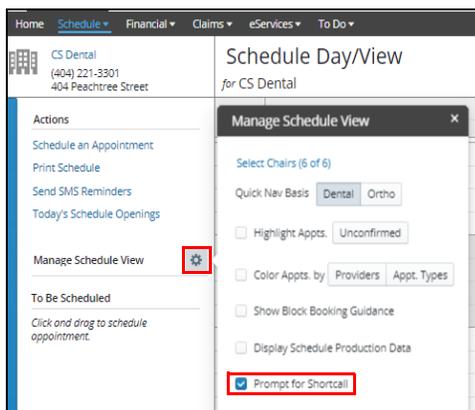
- 2 Use the filters to narrow the list, if needed, for time of day, provider, or duration.
- 3 Select the appointment in the list. The details are displayed.
- 4 Click **Reschedule**. The **Appointment Card** is displayed, where you can review or update details of the appointment and reschedule it.

Accessing Shortcall Appointments From the Schedule

You can configure the Schedule to prompt you to book an appointment from the Shortcall list when you cancel an appointment.

To access Shortcall appointments:

- 1 Select **Schedule > Day/Week View**.



- 2 Click the **Manage Schedule View Control**  icon. The **Manage Schedule View** settings are displayed.
- 3 Select the **Prompt for Shortcall** option.

Removing Appointments From the Shortcall List

The Shortcall list automatically purges appointments that occur as scheduled.

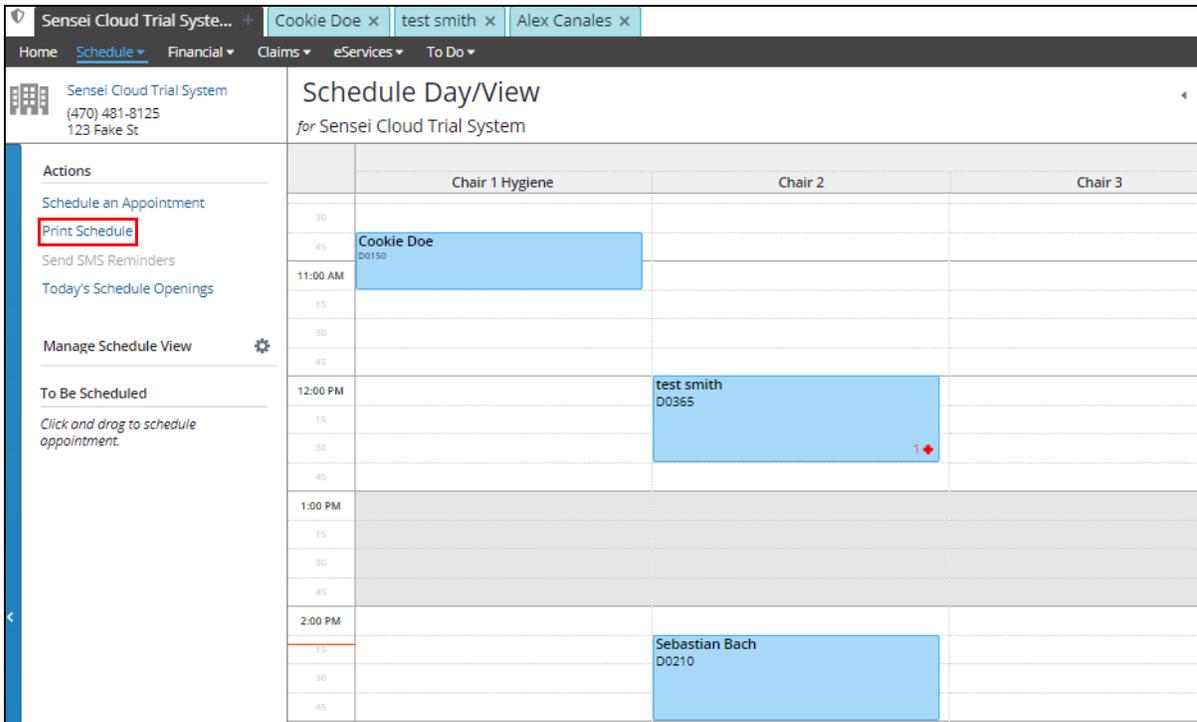
To manually remove them:

- Select **Remove from Shortcall** or **Cancel Appt.** from the details in the Shortcall list.
- OR**
- Change the **Put on Shortcall** status to **No** on the **Appointment Card**.

Printing the Schedule

To print the Schedule:

- 1 On the **Location** tab, select **Schedule > Day/Week View**. The Schedule is displayed.



The screenshot displays the 'Sensei Cloud Trial System' interface. The top navigation bar includes 'Home', 'Schedule', 'Financial', 'Claims', 'eServices', and 'To Do'. The main header shows 'Sensei Cloud Trial System' with contact information: '(470) 481-8125' and '123 Fake St'. The title of the view is 'Schedule Day/View for Sensei Cloud Trial System'. On the left, a sidebar menu lists 'Actions' (Schedule an Appointment, **Print Schedule**, Send SMS Reminders, Today's Schedule Openings), 'Manage Schedule View' (with a gear icon), and 'To Be Scheduled' (with a note to click and drag to schedule an appointment). The main content area is a grid with columns for 'Chair 1 Hygiene', 'Chair 2', and 'Chair 3', and rows for time slots: 11:00 AM, 1:00 PM, and 2:00 PM. Appointments are shown as blue blocks: 'Cookie Doe' (D0130) at 11:00 AM on Chair 1, 'test smith' (D0365) at 12:00 PM on Chair 2, and 'Sebastian Bach' (D0210) at 2:00 PM on Chair 2.

- 2 Under **Actions**, click **Print Schedule**. The **Print** window is displayed.
- 3 Select the printer settings.
- 4 Click **Print**.

Skill Sharpeners

Exercise 1—Screen and schedule an appointment for John Smith.

To screen and schedule an appointment:

- 1 Find a date on the Schedule on which to schedule Mr. Smith.
- 2 Under **Actions**, select **Schedule an Appointment**. The **Search Patients** field is displayed.
- 3 Enter **John Smith**. The **Appointment for John Smith** window is displayed.
- 4 Click **Screen Patient**. The **Patient Screening Form** is displayed.
- 5 Ask Mr. Smith each question and select **Yes** or **No**. Then click **Save Changes**.
- 6 From the **Search for procedures** drop-down list, select **D0150 (comprehensive oral evaluation - new or established patient)**.
- 7 Click **Schedule Appointment**. The Schedule is displayed.
- 8 Click-and-drag **John Smith** from the **To Be Scheduled** section to the time slot.

Exercise 2—John Smith calls and states that he needs to reschedule his appointment. He also indicates that he would like an earlier appointment if one becomes available.

To reschedule an appointment and to put John Smith on the Shortcall list:

- 1 On the Schedule, find Mr. Smith's appointment.
- 2 Click the appointment. The **Appointment Details** window is displayed.
- 3 Click **Reschedule**.
- 4 Find a new date on the Schedule.
- 5 Under **To Be Scheduled**, click-and-drag **John Smith** to the new time slot. Because Mr. Smith would like an earlier appointment, if possible, you need to add him to the Shortcall list.
- 6 On the Schedule, click John Smith's appointment. The **Appointment Details** window is displayed.
- 7 Click the **Pencil** icon in the upper-right corner. The **Appointment Card** is displayed.
- 8 Under **Appointment Info**, in the **Put on Shortcall** field, select **Anytime**.
- 9 Click **Update Appointment**.

Exercise 3—You call John Smith to remind him of his appointment date and time. He confirms the date, so you want to confirm Mr. Smith's appointment on the Schedule.

To confirm an appointment:

- 1 On the Schedule, find Mr. Smith's appointment.
- 2 Click the appointment. The **Appointment Details** window is displayed.
- 3 Click **Confirm**. His appointment is displayed with a dark blue triangle in the upper-right corner.

3 Checking Patients In and Out

This lesson contains the following topics:

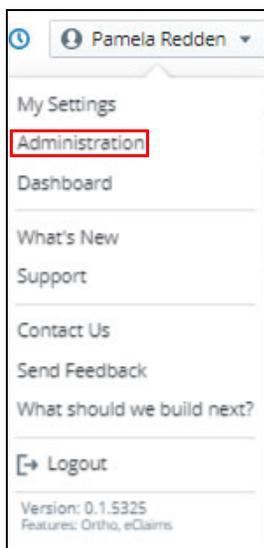
- [Screening Patients](#)
- [Checking Patients In](#)
- [Checking Patients Out](#)

Screening Patients

Sensei Cloud provides a way to screen patients for illness, symptoms, and risk factors prior to booking and checking in. Pre-appointment screening has become common to help protect staff and patients from COVID-19 and other transmissible infections. The Patient Screening form is based on the ADA Return to Work Interim Guidance Toolkit.

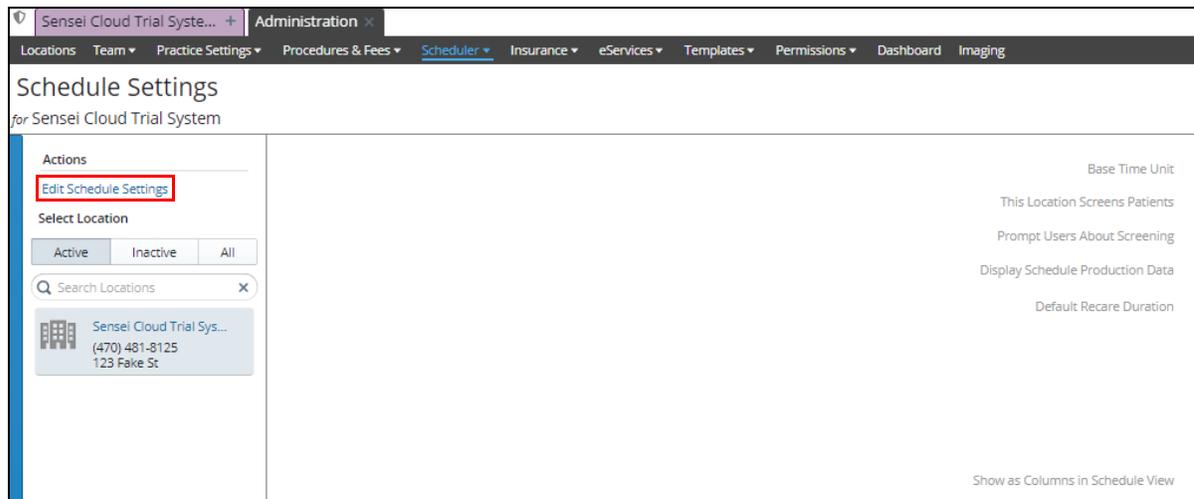
To enable the Patient Screening form:

- 1 Click your user name and select **Administration**.

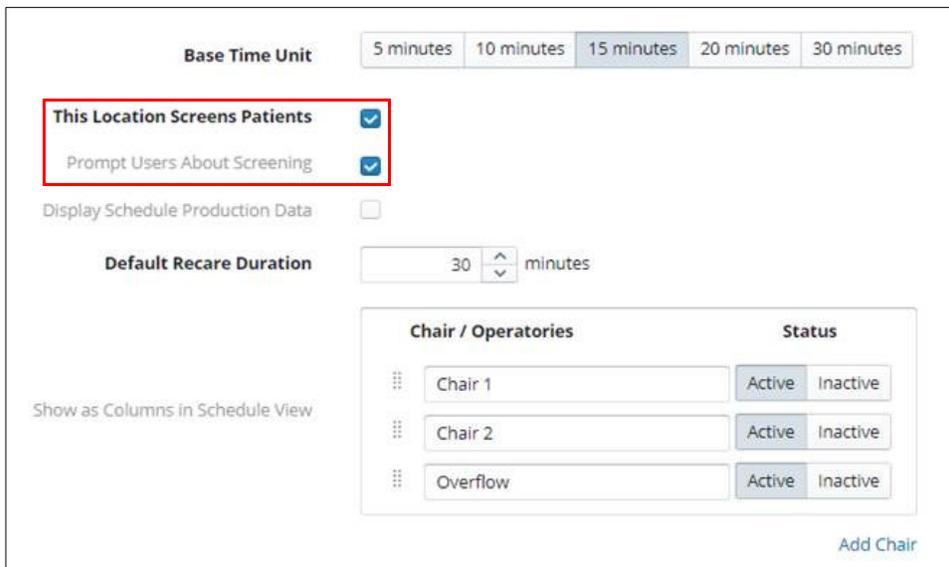


- 2 On the **Administration** tab, select **Scheduler > Schedule Settings**.

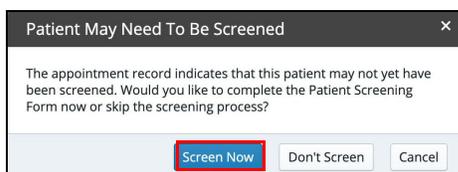
The **Schedule Settings** window is displayed.



- 3 Under **Actions**, click **Edit Schedule Settings**. The fields for changing the Schedule settings are displayed.



- 4 Select the **This Location Screens Patients** option. Patient screening controls are added to appointment interfaces and can be accessed at any time.
- 5 Select the **Prompt Users About Screening** option to prompt users to screen the patient. Prompts are also displayed when screening results indicate risk factors.
- 6 Click **Save**.
- 7 When scheduling or checking a patient in and you see the following message, click **Screen Now**.



Using the Patient Screening Form

When Patient Screening is enabled, the **Screen Patient** and **View Patient Screening Data** options are added to appointment controls.

A note is created and stored with the patient's appointment and clinical records each time the form is used. When you select **View Patient Screening Data**, the most recent screening is displayed. You can use the drop-down list to access previous forms.

To screen a patient:

- 1 Select **Screen Now** from the prompt or open a patient's appointment card.

Appointment for Samantha McDonald at Smiley Dental Surgery

Samantha McDonald
(916) 555-8965
Steve McDonald (Parent)

Medical Alerts (0)
No Patient Medical Alerts

Search to add procedures

Code	Description	Tooth/Quad	Surface(s)	Amount	
D0120	periodic oral evaluation - established patient			\$65.00	X
D1120	prophylaxis - child			\$84.00	X
D0274	bitewings - four radioeraphic			\$83.00	X
Total				\$0.00	

Total Due (Pt Due) \$232.00

[Add Note](#) [Audit Log](#) [Reminders](#)

Patient Screening form collected.
Tue, Nov 17, 2020 8:09 AM

Appointment Info

Unscheduled | Checked In | Seated | Completed | Cancelled

Location: Smiley Dental Surgery

Appt Type: Search

Confirmed: Yes No

Put on Shortcall: No AM Only PM Only Anytime

Duration: 30 Minutes

Doctor: Dr. Kevin Rees

Hygienist: Chris Spencer

Assistant: Search

Treatment Plan

[View Patient Screening Data](#) [Screen Patient](#) [Schedule Appointment](#) [Save Appointment](#) [Cancel](#)

- 2 Select **Screen Patient**.

The **Patient Screening Form** is displayed.

The screenshot shows a web application window titled "Patient Screening Form". The form contains the following fields and questions:

- Patient Name:** Samantha McDonald
- Date Collected:** 06/11/2020
- Collected By:** Dr. Kevin Rees
- Temperature Taken?** Yes No
- Patient Temperature:** A numeric input field with up/down arrows and unit selectors for °C and °F.
- Do you/they have fever or have you/they felt hot or feverish recently (14-21 days)?** Yes No
- Are you/they having shortness of breath or other difficulties breathing?** Yes No
- Do you/they have a cough?** Yes No
- Any other flu-like symptoms, such as gastrointestinal upset, headache or fatigue?** Yes No
- Have you/they experienced recent loss of taste or smell?** Yes No
- Are you/they in contact with any confirmed COVID-19 positive patients?** Yes No

At the bottom right of the form, there are two buttons: "Save Changes" (highlighted with a red box) and "Cancel".

- 3 Collect the patient's data and click **Save Changes**.

If the patient answers **Yes** to any question, the following alert is displayed.

The screenshot shows a dialog box titled "Screening Alert" with a close button (X) in the top right corner. The text inside the dialog reads:

Based on the responses entered in the Patient Screening Form, it is possible that the patient presents a risk of infection or illness.

Are you sure that you want to proceed with the appointment? You can choose to proceed with the appointment as scheduled or elect to rebook this appointment for a later date.

At the bottom of the dialog, there are two buttons: "Yes" (highlighted in blue) and "No".

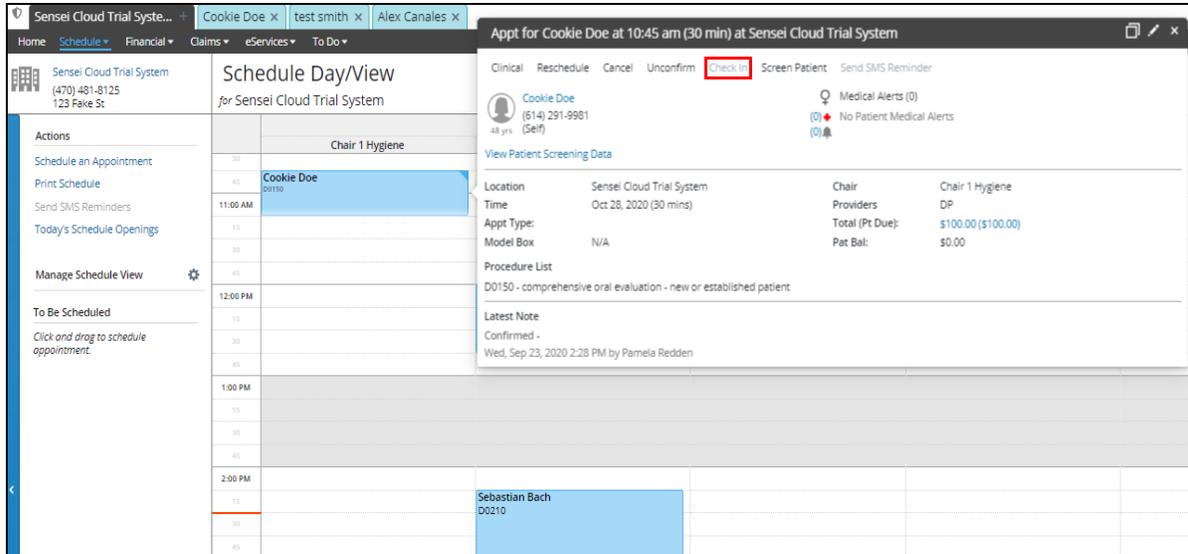
- 4 Click **Yes** or **No**.

Important: If risks are present, the patient is flagged with a medical alert for a period of three weeks; the **Screening Alert** message is displayed whenever an attempt is made to schedule the patient during that time period.

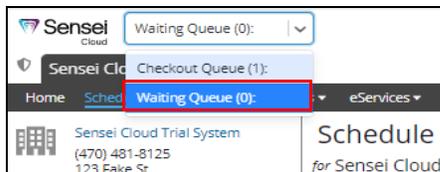
Checking Patients In

To check a patient in:

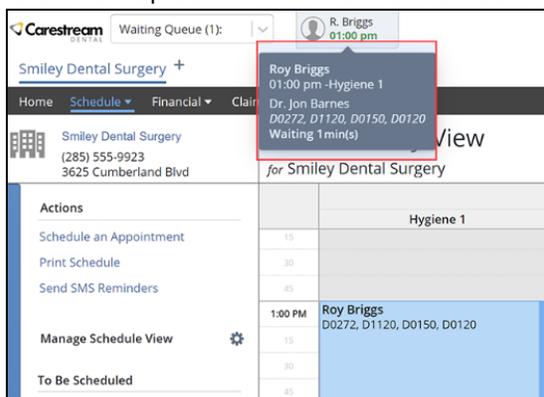
- 1 Select the patient's appointment on the Schedule. The **Appt. for** window is displayed.



- 2 Click **Check in**. A blue bar is added to the patient's appointment card, notifying that the patient has arrived, and the patient is placed in the **Waiting Queue**.



- 3 Click the drop-down arrow to switch between the **Waiting Queue** and the **Checkout Queue**.



- 4 To view details about the appointment, hover the cursor over the patient tile.

Tip: When a patient has been waiting longer than the scheduled appointment time, the time on the tile changes to red.

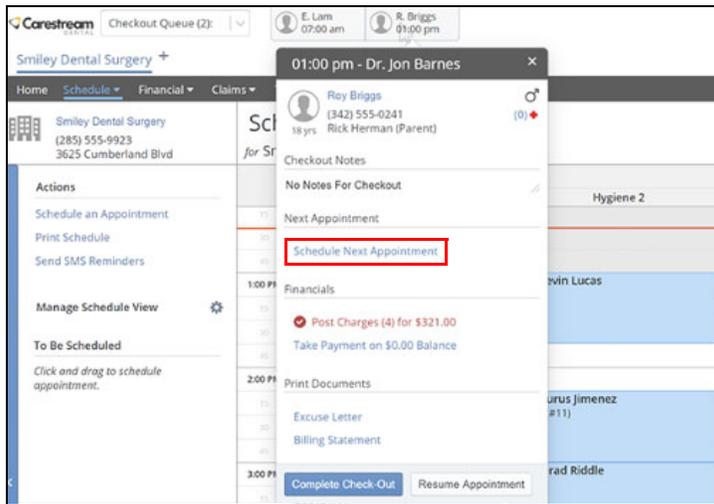
- 5 After the patient is taken to the operatory, select the appointment and click **Seat**. The patient is removed from the Waiting Queue, and the appointment turns dark blue.

Checking Patients Out

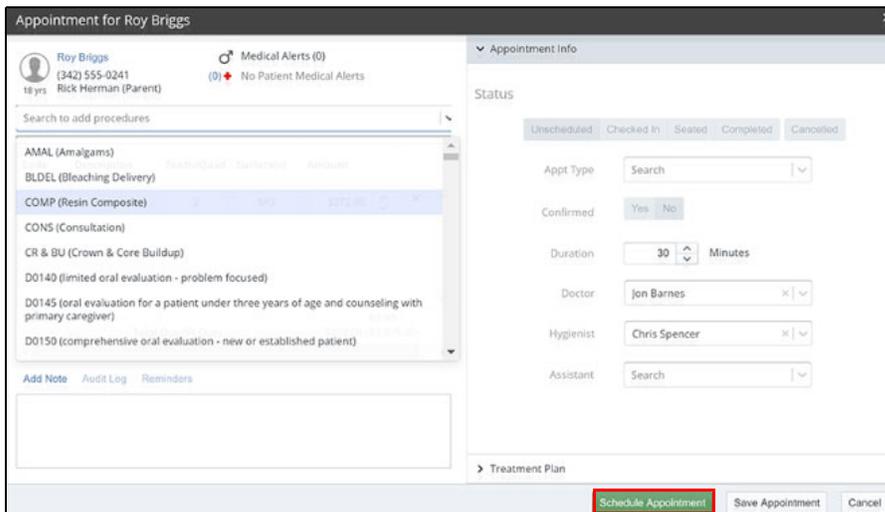
When a patient finishes treatment, change the status to **Complete**. The appointment color changes to light gray, and the patient is moved to the **Checkout Queue**.

To check a patient out:

- 1 Select **Checkout Queue** from the **Queue** drop-down list. The patient's name is displayed to the right of the queue.



- 2 Click the **Patient's name** to see the **Check-out** options and to review any checkout notes.
- 3 To schedule the patient's next appointment, click **Schedule Next Appointment**. The **Appointment for** window is displayed.



- 4 Enter the appointment information.
- 5 Click **Schedule Appointment**. The Schedule is displayed.
- 6 Find the date for the appointment and click-and-drag the patient's name from the **To Be Scheduled** section to the time slot.

-
- 7 Select the patient tile in the **Checkout Queue** again. To complete today's charges, click **Post Charges**.

The **Post Charges** window is displayed.

Bill Ins?	Code	Service Date	Description	Tooth/Quad	Surface(s)	Location	Provider	Amount
	ADJ	Today (09/1)	Routine Adjustment			Sensei Cloud Trial System	Doctor Pepper	\$0.00
Total								\$0.00

- 8 Add, edit, or delete charges, if necessary.
- 9 Click **Post Charges**.
- 10 To post a payment, from the **Checkout Queue**, click **Take Payment**.
- 11 Enter the payment information.
- 12 Click **Post Payment**.
- 13 To print a billing statement or an excuse letter, under **Print Documents** in the **Checkout Queue**, click **Excuse Letter** or **Billing Statement**.
- 14 Click **Complete Checkout**. The appointment turns dark gray.

Skill Sharpeners

Exercise 1—John Smith arrives for his appointment, so you want to screen him and check him in.

To check a patient in and to move the patient to the **Checkout Queue**:

- 1 Find Mr. Smith's appointment on the Schedule and click it. The **Appt. for John Smith** window is displayed.
- 2 Click **Check In**. The **Patient May Need To Be Screened** window is displayed.
- 3 Click **Screen Now**. The **Patient Screening Form** is displayed.
- 4 Take his temperature, record the temperature, and ask him the questions on the form.
- 5 Click **Save Changes**. Mr. Smith is placed in the **Waiting Queue**.
- 6 To view details about his appointment, click or hover the cursor over the patient tile next to the **Waiting Queue**.
- 7 When Mr. Smith is moved to the operatory, click the patient tile and click **Seat**. The patient is removed from the **Waiting Queue**, and the appointment turns dark blue.
- 8 When Mr. Smith's treatment is finished, click his name on the Schedule and click **Complete**. The appointment color changes to light gray, and John Smith is moved to the **Checkout Queue**.

Exercise 2—When you check Mr. Smith out, you want to schedule his next appointment and bill his insurance company for today's procedures.

To check Mr. Smith out:

- 1 Select **Checkout Queue** from the **Queue** drop-down list. Mr. Smith's patient tile is displayed to the right of the queue.
- 2 Click his name and see if there are any notes in the **Checkout Notes** field.
- 3 To schedule Mr. Smith's next appointment, click **Schedule Next Appointment**. The **Appointment for John Smith** window is displayed.
- 4 In the **Search to add procedures** field, click **D7220 (removal of impacted tooth - soft tissue)**.
- 5 In the **Tooth/Quad** field, type **17**.
- 6 In the **Location** field, verify that the office location is correct.
- 7 In the **Appt Type** field, select **Perio** from the drop-down list.
- 8 In the **Put on Shortcall** field, verify that **Anytime** is selected.
- 9 In the **Duration** field, increase the appointment time to **60 Minutes**.
- 10 In the **Doctor** and **Assistant** fields, select the names.
- 11 Click **Schedule Appointment**. The Schedule is displayed.

-
- 12 On the Schedule, find the date for the appointment and click-and-drag the patient's name from the **To Be Scheduled** section to the time slot.
 - 13 Because Mr. Smith has an insurance plan, open the **Checkout Queue** again and click **Post Charges and Bill Ins.**
 - 14 Because Mr. Smith has a \$50 deductible, collect the payment for today's services.
 - 15 Mr. Smith requests a receipt, so click **Billing Statement** under **Print Documents**. A PDF file is created and can be printed or emailed.
 - 16 Click **Complete Checkout**. The appointment turns dark gray.

4 Working with Insurance

This lesson includes the following topics:

- [Adding New Insurance Payers](#)
- [Adding New Insurance Plans](#)
- [Setting Up Insurance Claim Processing](#)
- [Managing Insurance Claims](#)
- [Printing Insurance Claims](#)

Adding New Insurance Payers

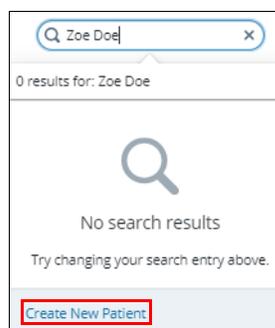
You can add new insurance payers in the Patient Record and as an administrator from the **Administration** tab.

In a Patient Record

You can add insurance information when you create a new Patient Record and when you edit an existing Patient Record.

To add an insurance payer in a new Patient Record:

- 1 In the **Search Patients** field, type the new patient's name to make sure he or she is not in the database. A **No Search Results** message is displayed.



- 2 Click **Create New Patient**. The **Create Patient** window is displayed.
- 3 Add information in the fields. See [Adding Patients](#) for more information.

- 4 Use the scroll bar to find the **Insurance Information** section, and click **Add Insurance Policy**. The **Create Insurance Policy** window is displayed.

The screenshot shows the 'Create Insurance Policy' window with the following fields and values:

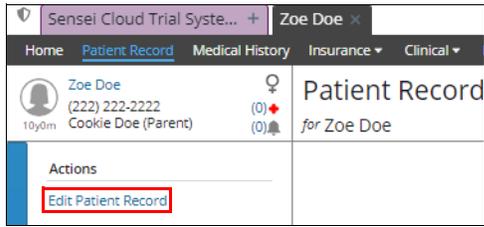
- Coverage:** Primary (selected), Secondary, Other
- Policyholder:** Cookie Doe
- Patient Relationship to Policyholder:** Child
- Associated Plan:** Delta Care - Iolo
- Insurance Carrier / Payer:** Delta Care
- Group Plan / Employer:** Iolo
- Subscriber / Member ID:** (empty)
- Effective Date:** 01/01/2020
- Assignment of Benefits:** Assigned (selected), Not Assigned
- Eligibility / Status:** Active (selected), Inactive, Unverified
- Individual:** (selected), Family
- Deductible Remaining:** \$0.00
- Benefits Remaining:** \$0.00

Buttons at the bottom: **Create** (highlighted in red), Cancel

- 5 In the **Coverage** field, select **Primary**, **Secondary**, or **Other**.
- 6 In the **Policyholder** field, select the policyholder to be associated with the policy.
- 7 In the **Patient Relationship to Policyholder** field, select:
- **Spouse**
 - **Child**
 - **Employee**
 - **Handicapped Dependent**
 - **Life Partner**
 - **Dependent**
- 8 In the **Associated Plan** field, select the employer from the list.
- 9 In the **Subscriber / Member ID**, enter the identification number.
- 10 In the **Effective Date**, select a date from the calendar.
- 11 In the **Assignment of Benefits** field, click **Assigned** or **Not Assigned**.
- 12 In the **Eligibility / Status** field, click **Active**, **Inactive**, or **Unverified**.
- 13 In the **Deductible Remaining**, add the amount per individual.
- 14 Click **Create**.
- 15 Click **Save Patient**.

To add an insurance payer to an existing Patient Record:

- 1 On a patient's tab, click **Patient Record**.



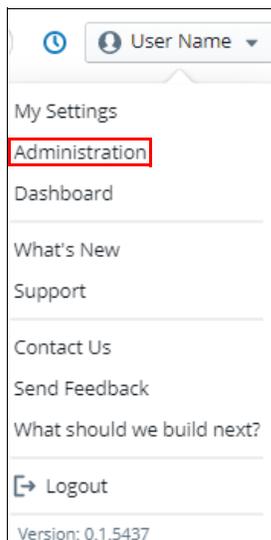
- 2 Under **Actions**, click **Edit Patient Record**.
- 3 Scroll down or jump to the **Insurance Information** section.
- 4 Click **Add Insurance Policy**. The **Create Insurance Policy** window is displayed.
- 5 Enter information in the fields as in the preceding steps 5 through 13.
- 6 Click **Create**.
- 7 Click **Save Patient**.

Note: To edit existing insurance information in the **Insurance Information** section, click **Edit** to the far right of the Policy Holder's name.

From the Administration Tab

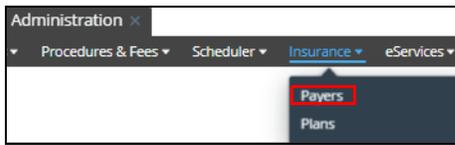
To add an insurance payer from the **Administration** tab:

- 1 Click your user name in the upper-right corner of the window. A list is displayed.

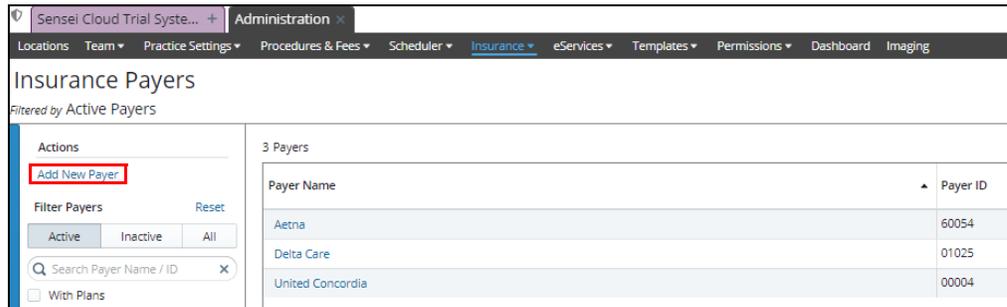


- 2 Click **Administration**, if you have user permission.

- 3 On the **Administration** tab, click **Insurance**.



- 4 Select **Payers**. The **Insurance Payers** window is displayed.



- 5 Under **Actions**, click **Add New Payer**. The **Create New Payer** window is displayed.

A screenshot of the 'Create New Payer' form. The form is divided into three sections: 'Payer Information', 'e-Services', and 'Contact Information'.
Payer Information:

- Payer Name: [Text Input]
- Status: [Active] [Inactive]
- Payer ID: [Search] [Dropdown]
- Payer Type: [Search] [Dropdown]

e-Services:

- eVerifications:
- eClaims:
- ePostings:

Contact Information:

- Main: [Text Input] [Star Icon] [Close Icon]
- Add Phone Number: [Link]
- Contact Name: [Text Input]
- Website: [Text Input]
- Notes: [Text Area]
- Address: [Text Input]
- Street Line 1: [Text Input]

At the bottom, there are 'Create' and 'Cancel' buttons.

- 6 Enter information in the fields.

Note: In the **Payer Type** field, if the type is not listed, select **Commercial**.

- 7 Click **Create**.

Editing Insurance Payers

To edit an insurance payer from the **Administration** tab:

- 1 Click your user name in the upper-right corner of the window. A list is displayed.
- 2 Click **Administration**, if you have user permission.
- 3 On the **Administration** tab, click **Insurance**.
- 4 Select **Payers**.
- 5 Under **Actions**, click the name of the insurance payer you want to edit. The **Update [Payer]** window is displayed.
- 6 Make the changes.
- 7 Click **Update**.

Adding New Insurance Plans

You add new insurance plans when you create a new policy in a Patient Record and, as an administrator, from the **Administration** tab.

In a Patient Record

You can add an insurance plan when you create a new Patient Record and when you edit an existing Patient Record.

To add an insurance plan in a Patient Record:

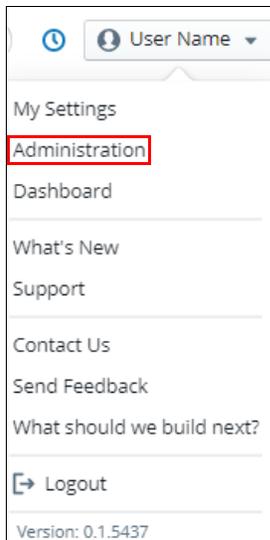
- 1 For a new patient, in the **Search Patients** field, type the patient's name to make sure he or she is not in the database and then click **Create New Patient**.
- 2 In the **Patient Record**, add information in the required fields, which are displayed in bold.
- 3 In the **Jump To** section, click **Insurance Information**, or use the scroll bar to find the **Insurance Information** section.
- 4 Click **Add Insurance Policy**. The **Create Insurance Policy** window is displayed.
- 5 Follow steps 5 through 15 in ["Adding New Insurance Payers" on page 37](#).

Note: The **Associated Plan** field is required. From the drop-down list, select the patient's employer.

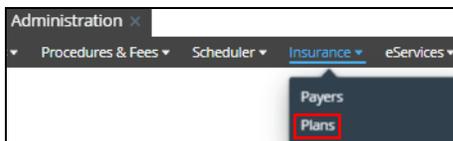
From the Administration Tab

To add an insurance plan from the **Administration** tab:

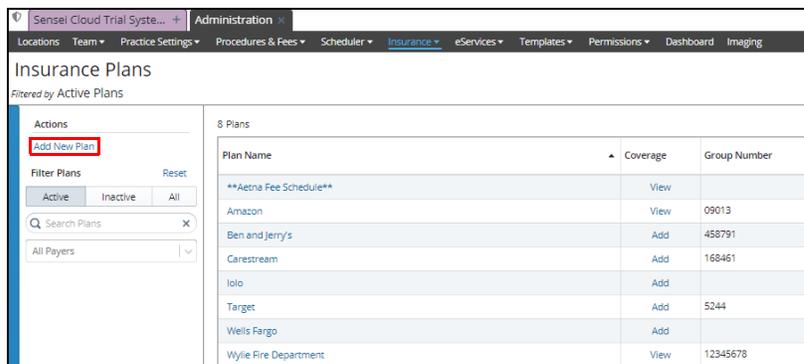
- 1 Click your user name in the upper-right corner of the window. A list is displayed.



- 2 Click **Administration**, if you have user permission.
- 3 On the **Administration** tab, click **Insurance**.



- 4 Select **Plans**. The **Insurance Plans** window is displayed.



- 5 Under **Actions**, select **Add New Plan**. The **Create Insurance Plan** window is displayed.

Create Insurance Plan

Plan Information

Status: Active Inactive

Contracted: Yes No

Name:

Payer: Search |

Group Number:

Contact Information

Same as Payer

Main: ★ x

Contact Name:

Address

Street Line 1:

Street Line 2:

City:

State: Search |

Zip Code:

Fee Coverage Information

- 6 In the **Status** field, verify that **Active** is selected.
- 7 In the **Name** field, type the employer name.
- 8 In the **Payer** field, select an insurance company.
- 9 In the **Group Number** field, enter the number, if you know it.
- 10 In the **Contact Information** section, select the **Same as Payer** option **OR** deselect the option and add the information in the fields.
- 11 Click **Create**.

Editing Insurance Plans

To edit an insurance plan:

- 1 In a patient's record, click **Edit Patient Record**.
- 2 In the **Jump To** section, click **Insurance Information**, or use the scroll bar to find the **Insurance Information** section.
- 3 To the right of the **Type** field, click **Edit**.

The **Update Insurance Policy** window is displayed.

Update Insurance Policy

Coverage: Primary Secondary Other

Policyholder: Testy Test

Patient Relationship to Policyholder: Self

Associated Plan: Aetna - Ben and Jerry's

Insurance Carrier / Payer: Aetna

Group Plan / Employer: Ben and Jerry's

Group Number: 458791

Subscriber / Member ID: 1-25451254156

Effective Date: 01/01/2020

Assignment of Benefits: Assigned Not Assigned

Eligibility / Status: Active Inactive Unverified

Individual: Family

Deductible Remaining: \$50.00 \$100.00

Benefits Remaining: \$1,500.00 \$0.00

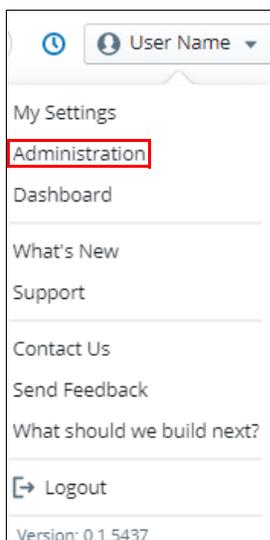
Update Cancel

- 4 In the **Associated Plan** field, select a different employer from the drop-down list.
- 5 Click **Update**.

Setting Coverage Details and Benefits by Category on an Insurance Plan

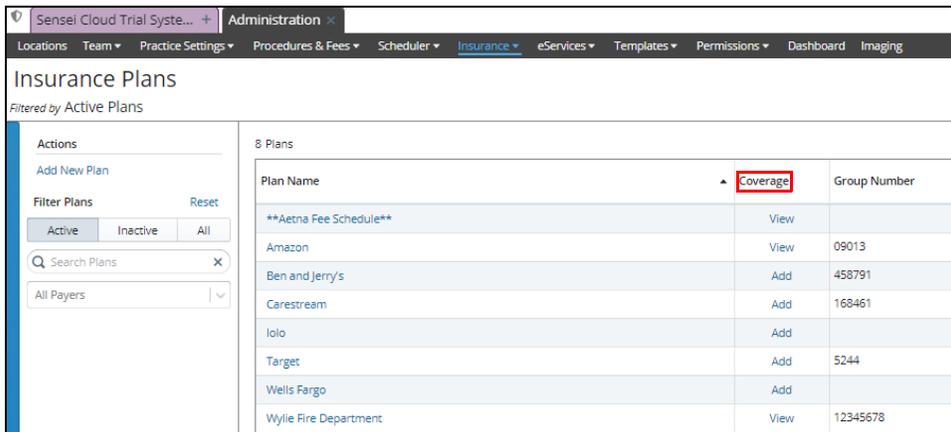
To set up coverage details and benefits by category on an insurance plan:

- 1 Click your user name in the upper-right corner of the window. A list is displayed.



- 2 Click **Administration**, if you have user permission.

- On the **Administration** tab, select **Insurance > Plans**. The **Insurance Plans** window is displayed.



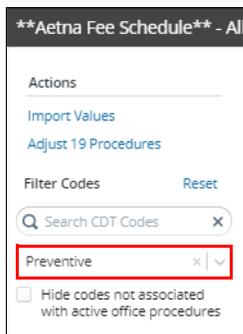
- In the **Coverage** column, click **Add** or **View** for the plan.

The **Allowance Table Summary** for the plan is displayed.

Category	Coverage	Copay Amt	Allowed Amt	Coverage %
Diagnostic	Covered	Not Specified	\$0.00 - \$65.00	0% - 100%
Preventive	Covered	Not Specified	\$0.00 - \$95.00	Not Specified
Restorative	Not Covered	Not Specified	\$0.00 - \$900.00	Not Specified
Endodontics	Not Covered	Not Specified	Not Specified	Not Specified
Periodontics	Not Covered	Not Specified	Not Specified	Not Specified
Prosthodontics, removable	Not Covered	Not Specified	Not Specified	Not Specified

Edit Allowance Table Details for this Plan

- Click **Edit Allowance Table Details for this Plan**.



- Under **Actions**, from the **Category** drop-down list, select a category.

The **Allowance Table** for the procedures in that category are displayed.

****Aetna Fee Schedule** - Allowance Table**

Actions: Import Values, **Adjust 19 Procedures**, Filter Codes, Reset, Search CDT Codes, Preventive, Hide codes not associated with active office procedures

CDT Code	CDT Nomenclature	Covered	Applies to Ded	Copay Amt	Allwd Amt	Cov %
D1110	prophylaxis - adult	Yes	No	\$0.00	\$95.00	0%
D1120	prophylaxis - child	Yes	No	\$0.00	\$0.00	0%
D1206	topical application of fluoride varnish	Yes	No	\$0.00	\$0.00	0%
D1208	topical application of fluoride - excluding varnish	Yes	No	\$0.00	\$0.00	0%
D1310	nutritional counseling for control of dental disease	Yes	No	\$0.00	\$0.00	0%
D1320	tobacco counseling for the control and prevention of oral disease	Yes	No	\$0.00	\$0.00	0%
D1330	oral hygiene instructions	Yes	No	\$0.00	\$0.00	0%
D1351	sealant - per tooth	Yes	No	\$0.00	\$0.00	0%
D1352	preventive resin restoration in a moderate to high caries risk patient - permanent tooth	Yes	No	\$0.00	\$0.00	0%
D1353	sealant repair - per tooth	Yes	No	\$0.00	\$0.00	0%
D1354	interim caries arresting medicament application	Yes	No	\$0.00	\$0.00	0%
D1510	space maintainer - fixed - unilateral	Yes	No	\$0.00	\$0.00	0%
D1515	space maintainer - fixed - bilateral	Yes	No	\$0.00	\$0.00	0%
D1520	space maintainer - removable - unilateral	Yes	No	\$0.00	\$0.00	0%
D1525	space maintainer - removable - bilateral	Yes	No	\$0.00	\$0.00	0%
D1550	re-cement or re-bond space maintainer	Yes	No	\$0.00	\$0.00	0%
D1555	removal of fixed space maintainer	Yes	No	\$0.00	\$0.00	0%
D1575	distal shoe space maintainer - fixed - unilateral	Yes	No	\$0.00	\$0.00	0%
D1999	unspecified preventive procedure, by report	Yes	No	\$0.00	\$0.00	0%

7 Click **Adjust # Procedures**. The **Adjust Coverage Rules** window is displayed.

Adjust Coverage Rules

Covered Yes No

Applies To Deductible Yes No

Copay Amount [] []

Coverage Percentage [] []

Apply Cancel

8 Select the items you want to adjust and then make the adjustment:

- **Covered**—Select **Yes** or **No**.
- **Applies To Deductible**—Select **Yes** or **No**.
- **Copay Amount**—Enter a dollar amount.
- **Coverage Percentage**—Enter a percentage.

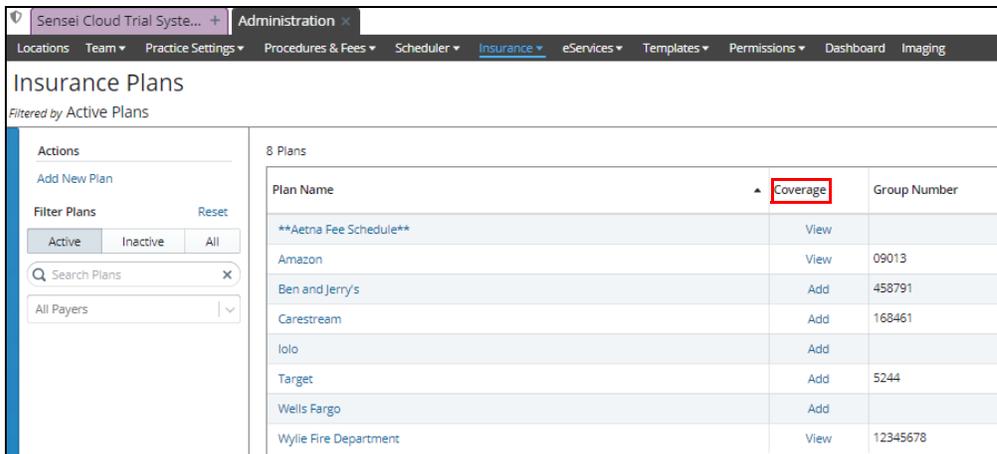
9 Click **Apply**.

10 Click **Save Changes**.

Importing Coverage Details to an Insurance Plan

To import coverage details:

- 1 On the **Administration** tab, select **Insurance > Plans**. The **Insurance Plans** window is displayed.



- 2 In the **Coverage** column field for the appropriate plan, click **Add** or **View**.

If you click **View**, you must then click **Edit Allowance Table Details for this Plan**. The **Allowance Table** for the plan is displayed.

CDT Code	CDT Nomenclature	Covered	Applies to Ded	Copay Amt	Allwed Amt	Cov %	Limitations
D0120	periodic oral evaluation - established patient	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0140	limited oral evaluation - problem focused	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0145	oral evaluation for a patient under three years of age and counseling with primary caregiver	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0150	comprehensive oral evaluation - new or established patient	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0160	detailed and extensive oral evaluation - problem focused, by report	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0170	re-evaluation - limited, problem focused (established patient; not post-operative visit)	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0171	re-evaluation - post-operative office visit	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0180	comprehensive periodontal evaluation - new or established patient	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0190	screening of a patient	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0191	assessment of a patient	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0210	intraoral - complete series of radiographic images	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0220	intraoral - periapical first radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0230	intraoral - periapical each additional radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0240	intraoral - occlusal radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0250	extra-oral - 2D projection radiographic image created using a stationary radiation source, and detector	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0261	extra-oral posterior dental radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0270	bitewings - single radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0272	bitewings - two radiographic images	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0273	bitewings - three radiographic images	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0274	bitewings - four radiographic images	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0277	vertical bitewings - 7 to 8 radiographic images	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined
D0290	posterior-anterior or lateral skull and facial bone survey radiographic image	Yes No	Yes No	\$0.00	\$0.00	0%	None Defined

- 3 Under **Actions**, click **Import Values**. The **Import Allowance Table Values** window is displayed.

Important: Before you can import office fees into an insurance plan, all procedures must have a fee associated with them.

4 In the **Import From** field, select **Office Fee Schedule** or **Existing Allowance Table**.

- If you select **Office Fee Schedule**, select **Overwrite All** or **Fill in Blanks**.

- If you select **Existing Allowance Table**, more options are displayed.

- Do the following:
 - Select the plan from the drop-down list.
 - Select **All Coverage Rules** or **Only Allowed Amounts**.
 - Select **Overwrite All** or **Fill in Blanks**.

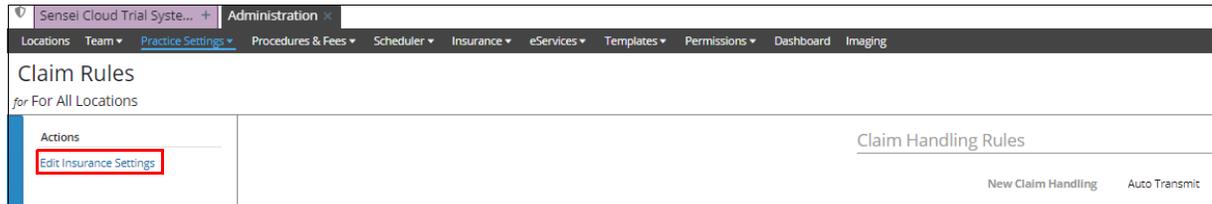
5 Click **Import Values**.

6 Click **Save Changes**.

Setting Up Insurance Claim Processing

To define how insurance claims are processed:

- 1 Click your user name and then click **Administration**. The **Administration** tab is displayed.
- 2 Select **Practice Settings > Claim Rules**. The **Claim Rules** for window is displayed.



- 3 Click **Edit Insurance Settings**.
- 4 Under **Claim Handling Rules**, in the **New Claim Handling** field, select one of the following:
 - **Auto Transmit**—Automatically queues generated insurance claims for transmission to the clearinghouse, provided that all claim requirements are met.
 - **Hold for Review**—Places all generated insurance claims into a temporary hold state, allowing for a review prior to transmission of the claim.

Note: The hold status enables you to print and review the claim before sending it.
- 5 Click **Save**.

Managing Insurance Claims

To manage claims for a location or for all locations in a practice, use the **Claims Management** window. From the **Location** tab, select **Claims > Claims Management**. The **Claims Management** window is displayed, listing the claims for the location.

The screenshot shows the 'Claims Management' window with a table of claims. The table has columns for Claim Number, Status, Type, Provider, Last Updated, Payer, Plan, Patient Name, Billed, and Paid. The claims are filtered by 'All Types, All Statuses, All Providers, All Dates'.

Claim Number	Status	Type	Provider	Last Updated	Payer	Plan	Patient Name	Billed	Paid
1750000000000053P	Paid	Svc	Doctor Pepper	10/07/2020	Aetna	Amazon	test smith	\$400.00	\$250.00
1750000000000054P	Queued	Svc	Doctor Pepper	09/24/2020	Delta Care	1010	Cookie Doe	\$200.00	\$0.00
1750000000000055P	Paid	Svc	Doctor Pepper	09/24/2020	Aetna	Wylie Fire Department	Debi Peterson	\$475.00	\$0.00
1750000000000057P	Paid	Svc	Doctor Pepper	09/24/2020	Aetna	Amazon	test smith	\$387.00	\$337.00
1750000000000058P	Needs Info	COT	Doctor Pepper	09/27/2020	Aetna	Wylie Fire Department	Sebastian Bach	\$342.23	\$0.00
1750000000000059P	Queued	Svc	Doctor Pepper	10/01/2020	Aetna	Wylie Fire Department	Debi Peterson	\$1,600.00	\$0.00
1750000000000060P	Needs Info	COT	Doctor Pepper	10/06/2020	Aetna	Wylie Fire Department	Miguel (Mike) Canales	\$499.91	\$0.00
1750000000000061P	Queued	Svc	Doctor Pepper	10/07/2020	Aetna	Ben and Jerry's	Debi Peterson	\$60.00	\$0.00
1750000000000062P	Queued	Svc	Doctor Pepper	10/07/2020	Aetna	Ben and Jerry's	Mary Smith	\$60.00	\$0.00
1750000000000063P	Queued	Pre-Auth	Doctor Pepper	10/07/2020	Aetna	Ben and Jerry's	Mary Smith	\$60.00	\$0.00
1750000000000064P	Paid	Svc	Doctor Pepper	10/09/2020	Aetna	Wylie Fire Department	Evan Daniels	\$500.00	\$500.00
1750000000000023P	Printed	Svc	Doctor Pepper	07/30/2020	Aetna	Wylie Fire Department	Kid - 8 years Doe	\$600.00	\$660.00
1750000000000024P	Needs Info	COT	Doctor Pepper	07/27/2020	Aetna	Wylie Fire Department	Sebastian Bach	\$342.23	\$0.00
1750000000000025P	Paid	Svc	Doctor Pepper	07/28/2020	Aetna	Wylie Fire Department	Kid - 8 years Doe	\$100.00	\$35.00
1750000000000026P	Queued	Svc	Doctor Pepper	07/29/2020	Aetna	Ben and Jerry's	Testy Test	\$210.00	\$0.00
1750000000000027P	Paid	Ortho	Doctor Pepper	09/24/2020	Aetna	Ben and Jerry's	Testy Test	\$5,000.00	\$500.00
1750000000000048P	Paid	Svc	Doctor Pepper	09/15/2020	Aetna	Wylie Fire Department	Debi Peterson	\$240.00	\$150.00

For each claim, you can view the **Claim Number, Status, Type, Provider, Last Updated Date, Payer, Plan, Patient Name, Billed Amount, and Paid Amount**.

You can:

- Sort the list by any column
- Search claims by patient, policyholder, claim ID, and procedure code
- Display only the claims that are cancelled, pending review, or awaiting attachments

Claims that require action display an **Alert** icon in the **Status** column.

Claim Number	Status	Type
1750000000000016P	Printed	Svc
1750000000000017P	Queued	Ortho
1750000000000018P	⚠ Needs Info	Ortho
1750000000000019P	Queued	Ortho
1750000000000035P	Printed	Ortho
1750000000000036P	Printed	Ortho
1750000000000037P	Error	Svc
1750000000000040P	⚠ Needs Info	COT
1750000000000041P	Paid	Ortho
1750000000000042P	⚠ Awaiting Attachment Confirmation	COT
1750000000000043P	⚠ Needs Info	Ortho

The claim type is assigned automatically when a claim is generated:

- **Svc**—Statement of actual services
- **Pre-Auth**—Request for pre-authorization
- **COT**—Continuation of treatment for orthodontic services
- **Ortho**—Initial claim for orthodontic treatment

To view a claim summary, select a claim in the list. The **Claim Summary** window is displayed.

1750000000000054P Queued Svc Doctor Pepper 09/24/2020 Delta Care Iolo Cookie Doe \$200.00 \$0.00

Claim Summary

Cookie Doe (614) 291-9981 (Self) Created On 09/24/2020 Status Queued
 Policyholder Cookie Doe Status Change Note
 Attachment Ref # Not configured

1 code performed at Sensei Cloud Trial System for a total of \$200.00

CDT Code	CDT Nomenclature	Tooth/Quadrant	Surface(s)	Provider	Service Date	Fee	Attach Req
D9970	enamel microabrasion			Doctor Pepper	September 24, 2020	\$200.00	None

Print Claim Apply Payment Edit Additional Info Update Status Cancel Claim

In the **Claim Summary** window, you can:

- View the claim details
- Print the claim
- Apply a payment
- Edit additional information
- Update the claim status
- Cancel the claim

Cancelling and Resubmitting Insurance Claims

If an error exists on a claim, you must cancel it and then resubmit it. To cancel and resubmit a claim:

- 1 From the **Patient** tab, select **Insurance > Claims Management**. The **Claims Management** window is displayed.

Claim Number	Status	Location	Provider	Last Updated	Payer	Plan	Included Codes	Billed	Paid
1750000000000028P	Queued	Sensei Cloud Trial System	Doctor Pepper	07/29/2020	Aetna	Ben and Jerry's	D0210	\$210.00	\$0.00
1750000000000029P	Needs Info	Sensei Cloud Trial System	Doctor Pepper	07/30/2020	Aetna	Ben and Jerry's	D8090	\$5,000.00	\$0.00

- 2 Select the claim you want to cancel.

1750000000000025P	Printed	Sensei Cloud Trial System	Doctor Pepper
-------------------	---------	---------------------------	---------------

The **Claim Summary** window is displayed.

Print Claim	Apply Payment	Edit Additional Info	Update Status	Cancel Claim
-----------------------------	-------------------------------	--------------------------------------	-------------------------------	------------------------------

- 3 In the lower-right, click **Cancel Claim**. A message is displayed.
- 4 Click **Yes**.
- 5 Click **Financials**. The **Ledger for** window is displayed.

Trans Da...	Svc Date	Code	Description	Amount	Current	Total
08/30/2020	08/30/2020	Contract Charge	Aligners	\$0.00	\$960.00	\$5,210.00
07/30/2020	07/30/2020	Contract Downpayment	Aligners	\$0.00	\$710.00	\$5,210.00
07/30/2020	07/30/2020	D8090	comprehensive orthodontic treatment of the adult dentition	\$5,000.00	\$210.00	\$5,210.00
07/29/2020	07/29/2020	D0210	intraoral - complete series of radiographic images	\$210.00	\$210.00	\$210.00
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment	-\$500.00	\$0.00	\$0.00
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment	-\$4,500.00	\$500.00	\$500.00
07/27/2020	07/27/2020	Contract Downpayment	Ortho	\$0.00	\$500.00	\$5,000.00
07/27/2020	07/27/2020	D8090	comprehensive orthodontic treatment of the adult dentition	\$5,000.00	\$0.00	\$5,000.00

- 6 Under **Actions**, click **Create New Claim**. The **Create Insurance Claim** window is displayed.

Svc Date	Code	Description	Tooth/Quad	Surface(s)	Provider	Location	Amount
<input type="checkbox"/> July 27, 2020	D8090	comprehensive orthodontic treatment of the adult dentition			Doctor Pepper	Sensei Cloud Trial System	\$5,000.00

Total to be claimed: 0.00

[Create](#) [Cancel](#)

- 7 Click **Create**.

Adjusting Charges

If you need to adjust a charge that was submitted to insurance, you must first cancel the insurance claim. See “[Cancelling and Resubmitting Insurance Claims](#)” on page 51 for more information.

To adjust a charge posted in error to a patient's ledger:

- 1 Find the patient for whom you want to adjust a charge and click the **Patient Record** tab.
- 2 Select **Financials > Ledger**. The **Ledger for** window is displayed.

Trans Da...	Svc Date	Code	Description
08/30/2020	08/30/2020	Contract Charge	Aligners
07/30/2020	07/30/2020	Contract Downpayment	Aligners
07/30/2020	07/30/2020	D8090	comprehensive orthodontic treatment of the adult dentition
07/29/2020	07/29/2020	D0210	intraoral - complete series of radiographic images
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/27/2020	07/27/2020	Contract Downpayment	Ortho
07/27/2020	07/27/2020	D8090	comprehensive orthodontic treatment of the adult dentition

- 3 Click on the procedure line to view the charge details. The **Charge Details** window is displayed.
- 4 Click **Adjust This Charge** in the upper-right corner of the window. The **Adjust This Charge** window is displayed.

- 5 Select **Charge in Error** or **Wrong Amount**.

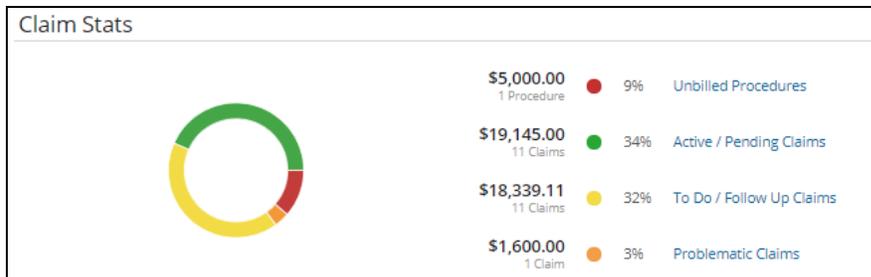
Note: **Charge in Error** removes the entire charge; **Wrong Amount** enables you to enter the correct procedure fee.

- 6 Enter the correct amount.
- 7 Enter a note in the **Comments** field.
- 8 Click **Adjust Charge**.

Viewing Insurance Claim Statistics

To view claim stats:

- 1 Click the location's **Home** tab. The **Home** window displays the claim statistics at the bottom.



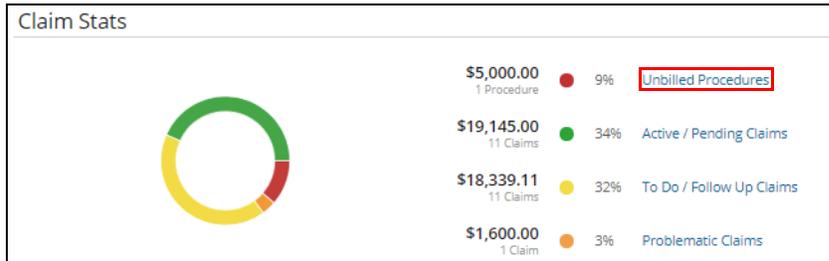
- 2 In the **Claim Stats** section, click one of the following to see the statistics:
 - **Unbilled Procedures**—Patients who have insurance, but claims have not been prepared for the services rendered.
 - **Active / Pending Claims**—Claims that have been submitted to an insurance company or are queued and pending submission.
 - **To Do / Follow Up Claims**—Claims that need action. These claims are filtered by:
 - Needs Info
 - Awaiting Attachments
 - Awaiting Attachment Confirmation
 - Pending Review
 - All Providers
 - All Payers
 - All Dates
 - **Problematic Claims**—Claims that contain errors or encountered problems. These claims are filtered by:
 - Rejected
 - Denied
 - Error
 - Reopened
 - All Providers
 - All Payers
 - All Dates

Processing Unbilled Procedures

Unbilled procedures are procedures that have been completed and posted to patient ledgers, but not yet billed to an insurance company.

To process unbilled procedures:

- 1 Click the location's **Home** tab. The **Home** window displays the claim statistics at the bottom.



- 2 In the **Claim Stats** section, click **Unbilled Procedures**.

OR

On the **Home** tab, select **To Do > Unbilled Procedures**.

The **Unbilled Procedures** window displays a list of patients for whom billable work has been completed, but not billed to their insurance companies.

Unbilled Procedures		# Patients	4
		# Procedures	12
Filtered by All Patients, All Providers, All Payers, All Production Values, All Times		Production Value	\$1,268.30
Patient	Unbilled procedures	Unbilled Since	Unbilled
Heath Garza	(4) D0120, D1110, D0274, D1330	10/30/2019	\$415.25
Terrence Molarnator	(4) D9310, D0220, D0230, D9310	08/02/2019	\$367.00
Nye Moloney	(2) D9310, D0210	08/15/2019	\$317.00
Kenneth Smith	(2) D0120, D0140	01/07/2020	\$169.05

Note: You can filter the list by patients, providers, payers, a service date or range, or a revenue value range.

- 3 Click an item in the list to view summary details and insurance information, to view the patient's ledger, or to manage claims for the patient.

Billy Kid		(2) D1110, D0160	
	Billy Kid (770) 558-9999 30 yrs (Self)		2 Unbilled Procedures from 05/06/2019 to 09/05/2019 totalling \$300.00
		Last claim on 08/17/2020 3 open claims totalling \$480.00	
Create New Claim View Ledger Manage Claims			

- Click **Create New Claim**. The **Create Insurance Claim** window is displayed with a list of the patient's unbilled procedures.

Unbilled procedures have been posted to the patient account. Select from the list below to bill this work to the patient's insurance. One or more insurance claims will be created and sent out electronically.

2 of 2 unbilled procedure(s) selected

Svc Date	Code	Description	Tooth/Quad	Surface(s)	Provider	Location	Amount
September 5, 2019	D1110	prophylaxis - adult			David Williams	CS Dental	\$50.00
May 6, 2019	D0160	detailed and extensive oral evaluation - problem focused, by report			Emily Nelson	CS Dental	\$250.00

One or more insurance claims to Anthem Blue Cross of GA will be created for 2 selected procedure(s)

Total to be claimed: \$300.00

Create Cancel

- Select the procedures to include in the claim.
- Click **Create**.

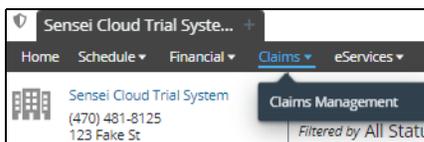
Printing Insurance Claims

You can print claims from the location's **Home** tab and from a **Patient Record** tab.

Important: If you print a claim before submitting it electronically, you must change the status of the claim back to queued for it to be submitted.

To print insurance claims:

- On the location's **Home** tab, select **Claims > Claims Management**.



A list of claims is displayed.

- Use the **Filter List** options to refine the list, as needed.
- Select a claim to print. The **Claim Summary** is displayed.

Claim Summary

Printed Sensei Cloud Trial System Doctor Pepper 07/30/2020 Aetna Ben and Jerry's DB090 \$5,000.00 \$0.00

Testy Test (470) 481-7824 38 yrs (Self) Created On: 07/27/2020 Attachment Ref #: Not configured Status: Printed Status Change Note: Changed from Queued Thu Jul 30 2020 11:02 AM - Deborah (Debbie) Fletcher

1 code performed at Sensei Cloud Trial System for a total of \$5,000.00

CDT Code	CDT Nomenclature	Tooth/Quad	Surface(s)	Provider	Service Date	Fee	Attach Req
DB090	comprehensive orthodontic treatment of the adult dentition			Doctor Pepper	July 27, 2020	\$5,000.00	None

Print Claim Apply Payments Edit Additional Info Update Status Cancel Claim

- To view details, click **View Claim Details**.
- Click **Print Claim**. A PDF file that can be printed is generated, and the status of the claim is changed to **Printed**.

Note: A notification is displayed when you submit a claim electronically to the CSD clearinghouse with a status of **Printed**, or when you print a claim that has already been submitted, paid, or settled.

Skill Sharpeners

Exercise 1—John Smith arrives for his appointment and provides you with his insurance information. Create the insurance policy for Mr. Smith.

To add a new insurance payer:

- 1 On John Smith's **Patient** tab, click **Patient Record**.
- 2 Under **Actions**, click **Edit Patient Record**.
- 3 Use the scroll bar or jump to **Insurance Information**.
- 4 Click **Add Insurance Policy**. The **Create Insurance Policy** window is displayed.
- 5 In the **Coverage** field, click **Primary**.
- 6 In the **Payer Name** field, select **John Smith**.
- 7 In the **Patient Relationship to Policyholder** field, verify that **Self** is displayed.
- 8 In the **Associated Plan** drop-down list, select **ABC Dental**.
- 9 In the **Subscriber / Member ID** field, type **DO123**.
- 10 In the **Effective Date**, select **10/01/2020**.
- 11 In the **Assignment of Benefits** field, click **Assigned**.
- 12 In the **Eligibility / Status** field, click **Active**.
- 13 In the **Individual Deductible** field, enter **\$150.00**.
- 14 Click **Create**.
- 15 Click **Save Patient**.

Exercise 2—You realize you made an error on Mr. Smith's policy.

To edit an insurance policy:

- 1 On John Smith's **Patient** tab, click **Patient Record**.
- 2 Under **Actions**, click **Edit Patient Record**.
- 3 Use the scroll bar or jump to **Insurance Information** and click **Edit**. The **Update Insurance Policy** window is displayed.
- 4 Change the **Individual Deductible** amount to **\$50.00**.
- 5 Click **Update**.
- 6 Click **Save Patient**.

5

Working with Charges and Payments

This lesson contains the following topics:

- Posting Charges
- Posting Payments
- Running the Final Daysheet

Posting Charges

To post a charge at check out:

- 1 After changing the **Appointment Status** to **Complete**, the patient is placed in the **Checkout Queue**.
- 2 If more than one patient is displayed, click the patient you want to check out. The **Checkout** window is displayed.

10:15 am - Dr. Jason Parker

William (Bill) Murphy
(770) 222-6011
63 yrs (Self)

Next Appointment

Schedule Treatment Plan Items (8)
Schedule Next Appointment

Financials

⚠ Post Charges (1) for \$120.00
🔴 Take Payment on \$159.20 Balance

Print Documents

Excuse Letter
Billing Statement

Complete Check-Out Resume Appointment

- 3 Click **Post Charges**. The **Post New Charges** window displays the procedures attached to the appointment. In the **Search to add procedures** field, you can add additional procedures.

John Smith - Post New Charges

Search for and select procedures to charge to John Smith's account. Checking billable items in the 'Bill Ins?' column will automatically create a new insurance claim that will be submitted to ABC Dental.

Search to add procedures

Bill Ins?	Code	Service Date	Description	Tooth/Quad	Surface(s)	Location	Provider	Amount
<input checked="" type="checkbox"/>	D0150	Today (12/0)	comprehensive oral evaluation - new or established patient			Sensei Cloud Trial System	Doctor Pepper	\$100.00
<input checked="" type="checkbox"/>	D0210	Today (12/0)	intraoral - complete series of radiographic images			Sensei Cloud Trial Sys	Doctor Pepper	\$200.00
Total								\$300.00

An insurance claim to ABC Dental will be created for \$300.00 (2 selected procedures) upon posting to the Patient Ledger.

Post Charges & Bill Ins Cancel

- 4 Click **Post Charges & Bill Ins**.

Posting Charges to the Ledger

To post a charge directly to the ledger:

- 1 Select the patient from whom you want to post the charge.
- 2 Select **Financials > Ledger**. The **Ledger** for window is displayed.

The screenshot shows the 'Ledger' window for 'Testy Test'. The top navigation bar includes 'Home', 'Patient Record', 'Medical History', 'Insurance', 'Clinical', 'Financials', 'Treatment Plan', 'Patient Files', and 'Notes'. The 'Financials' menu is open, showing 'Ledger' and 'Contracts'. The 'Ledger' window displays the following summary:

Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days
\$1,460.00	\$3,250.00	\$4,710.00	\$250.00	\$250.00	\$250.00

Below the summary is a table of transactions:

Trans Da...	Svc Date	Code	Description
12/30/2020	12/30/2020	Contract Charge	Aligners
12/16/2020	11/30/2020	Charge Adjustment	ADJUSTMENT: Charge in Error
11/30/2020	11/30/2020	Contract Charge	Aligners
11/30/2020	11/30/2020	Contract Charge	ADJUSTED: Aligners
10/30/2020	10/30/2020	Contract Charge	Aligners
09/30/2020	09/30/2020	Contract Charge	Aligners
09/24/2020	09/24/2020	Insurance	Payment Insurance - Claim #: 1750000000000029P
08/30/2020	08/30/2020	Contract Charge	Aligners
07/30/2020	07/30/2020	Contract Downpayment	Aligners
07/30/2020	07/30/2020	D8090	comprehensive orthodontic treatment of the adult dentition
07/29/2020	07/29/2020	D0210	intraoral - complete series of radiographic images
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment

- 3 Under **Actions**, click **New Charge**. The **Post New Charges** is displayed. .

The screenshot shows the 'Post New Charges' window for 'John Smith'. The window includes a search field for procedures and a table of selected procedures:

Bill Ins?	Code	Service Date	Description	Tooth/Quad	Surface(s)	Location	Provider	Amount
<input checked="" type="checkbox"/>	D0150	Today (12/0)	comprehensive oral evaluation - new or established patient			Sensei Cloud Trial System	Doctor Pepper	\$100.00
<input checked="" type="checkbox"/>	D0210	Today (12/0)	intraoral - complete series of radiographic images			Sensei Cloud Trial Sys	Doctor Pepper	\$200.00
Total								\$300.00

At the bottom of the window, there is a message: 'An insurance claim to ABC Dental will be created for \$300.00 (2 selected procedures) upon posting to the Patient Ledger.' The 'Post Charges & Bill Ins.' button is highlighted in red.

- 4 In the **Search to add procedures** field, add the procedures.
- 5 Click **Post Charges & Bill Ins.**

Adjusting Charges Posted in Error

Note: If the procedure is associated with an outstanding claim, cancel the claim first.

To adjust a charge posted in error to a patient's ledger:

- 1 Find the patient for whom you want to adjust a charge and click **Patient Record** on the menu bar.
- 2 Select **Financials > Ledger**. The **Ledger** for window is displayed.

Trans Da...	Svc Date	Code	Description
08/30/2020	08/30/2020	Contract Charge	Aligners
07/30/2020	07/30/2020	Contract Downpayment	Aligners
07/30/2020	07/30/2020	D8090	comprehensive orthodontic treatment of the adult dentition
07/29/2020	07/29/2020	D0210	intraoral - complete series of radiographic images
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/27/2020	07/27/2020	Contract Downpayment	Ortho
07/27/2020	07/27/2020	D8090	comprehensive orthodontic treatment of the adult dentition

- 3 Click on the procedure line to view the charge details. The **Charge Details** window is displayed.
- 4 Click **Adjust This Charge** in the upper-right corner. The **Adjust This Charge** window is displayed.

Please choose the type of adjustment for: D2610 - \$500.00 - inlay - porcelain/ceramic - one surface

Charge in Error **Wrong Amount**

New Amount: \$0.00

Comments:

Adjust Charge Cancel

- 5 Select **Charge in Error** or **Wrong Amount**.
Note: **Charge in Error** removes the entire charge; **Wrong Amount** enables you to enter the correct procedure fee.
- 6 Enter a note in the **Comments** field. This field is required.
- 7 Click **Adjust Charge**. The original line item is adjusted, and a new line item with the corrected fee is added.

Posting Payments

To post a payment at check out:

- 1 After changing the **Appointment Status** to **Complete**, the patient is placed in the **Checkout Queue**.
- 2 If more than one patient is displayed, click the patient you want to check out. The **Checkout** window is displayed.

06:15 pm - Doctor Pepper

Willy Brown
(458) 478-9658
53 yrs (Self)

Checkout Notes
2 unit Adjustment

Next Appointment
Schedule Treatment Plan Item (1)
Schedule Next Appointment

Financials
Post Charges (0) for \$0.00
Take Payment on \$4,525.00 Balance

Print Documents
Excuse Letter
Billing Statement

Complete Check-Out Resume Appointment

- 3 Click **Take Payment**. The **Post New Payment** window displays the procedures attached to the appointment. In the **Search to add procedures** field, you can add additional procedures.

Willy Brown - Post New Payment

Patient Payment and Balances

Patient Name	Amount Paid	Patient Balance	Resulting Balance
Willy Brown	\$300.00	\$4,650.00	\$4,350.00

Search

Payment Information

Location: Sensei Cloud Trial System
Acceptance Date: Today (01/25/2021)
Payment Type: Insurance
Claim Number: 175000000000111P
Reference: Claim # 175000000000111P
Comment:
Payment Amount: \$300.00

Post Payment Cancel

- 4 In the **Amount Paid** field, enter the amount.
- 5 In the **Location** field, confirm the location.
- 6 In **Acceptance Date** field, confirm the date.
- 7 From the **Payment Type** drop-down list, select the type of payment.

8 In the **Reference** field, enter a reference, if necessary; for example, **Deductible**.

Note: Text you enter in the **Reference** field is displayed on patient statements and in financial reports.

9 In the **Comments** field, enter comments, if any.

10 Click **Post Payment**.

Posting Insurance Payments

To post an insurance payment:

1 In a patient's chart, select **Financials > Ledger**. The **Ledger for** window is displayed.

The screenshot shows the 'Ledger for Testy Test' window. At the top, there is a navigation bar with 'Financials' selected. Below the navigation bar, the patient's name 'Testy Test' and contact information are displayed. A summary section shows the following balances:

Current Balance	Contract Balance	Total Balance	0-30 Days
\$710.00	\$4,000.00	\$4,710.00	\$250.00

Below the summary, there is a table of transactions with columns for 'Trans Da...', 'Svc Date', 'Code', and 'Description'. The transactions include contract charges, insurance payments, and orthodontic treatments.

2 Under **Actions**, click **New Payment**. The **Post New Payment** window is displayed.

The screenshot shows the 'Post New Payment' window. It is divided into two main sections: 'Patient Payment and Balances' and 'Payment Information'. In the 'Patient Payment and Balances' section, the patient name 'Testy Test' is entered, and the 'Amount Paid' field is highlighted with a red box, containing the value '\$2,000.00'. The 'Patient Balance' is \$4,710.00 and the 'Resulting Balance' is \$2,710.00. In the 'Payment Information' section, the 'Location' is 'Sensei Cloud Trial System', the 'Acceptance Date' is 'Today (10/14/2020)', the 'Payment Type' is 'Insurance', and the 'Claim Number' is '1750000000000025P'. The 'Payment Amount' is \$2,000.00. A 'Post Payment' button is located at the bottom right of the window.

3 In the **Amount** field, enter the payment amount.

4 In the **Payment Type** field, select **Insurance**.

5 From the **Claim Number** drop-down list, select the claim.

- 6 In the **Comments** field, enter any additional information about the payment.
- 7 Click **Post Payment**.

Posting Split Payments

To split a payment between patients:

- 1 Find one of the patients for whom you want to post a payment and select **Financials > Ledger**. The **Ledger for** window is displayed.
- 2 Under **Actions**, click **New Payment**. The **Post New Payment** window is displayed.
- 3 In the **Search** field, type the name of an additional patient.
- 4 Select the patient. The **Post New Payment** window is displayed with all patients you have selected.

Alex Canales - Post New Payment

Patient Payment and Balances

Patient Name	Amount Paid	Patient Balance	Resulting Balance
Alex Canales	\$100.00	\$9,375.00	\$9,275.00
Miguel (Mike) Canales	\$100.00	\$15,511.00	\$15,411.00

Search

Payment Information

Location: Sensei Cloud (2) Trial System

Acceptance Date: Today (09/22/2020)

Payment Type: Credit Card

Reference:

Comment:

Payment Amount: \$200.00

Post Payment Cancel

- 5 In **Amount Paid** field, enter the amounts for each patient.
 - 6 In the **Location** field, confirm the location.
 - 7 In **Acceptance Date** field, confirm the date of the payment.
 - 8 From the **Payment Type** drop-down list, select the type of payment.
 - 9 In the **Reference** field, enter a reference; for example, **Deductible**.
- Note:** Text you enter in the **Reference** field is displayed on patient statements and in financial reports.
- 10 In the **Comments** field, enter comments, if any.
 - 11 Click **Post Payment**. The **Split Payment Summary** window is displayed for reference. You can select any patient to view his or her ledger.

Posting Applied Payments

For practices that pay providers based on collections, Sensei Cloud's Applied Payments functionality enables you to apply funds from posted credits to open debits, or charges. By applying payments directly to a producer's work, you can track and report on collection activities for each provider. This functionality is disabled by default. Administrative permissions are required to enable it.

You can also enable a prompt that displays the **Apply Payment** window automatically when a payment is posted, enabling a team member to distribute the funds.

When this feature is enabled, you can:

- Apply credits to open charges when posting the transaction
- Apply credits after the payment is posted
- View distribution details
- Track and report on distributions and un-applied credits in the **Applied Payments** window.

To enable the Applied Payments feature:

- 1 In the upper-right corner of a window, select your name and then click **Administration**. The **Administration** window is displayed.



- 2 Select **Practice Settings > Financial Rules**.
- 3 Under **Actions**, click **Edit Financial Rules**.
- 4 In the **This Practice Distributes Credits** field, click **Yes**.
- 5 To prompt users to apply posted funds to open charges, in the **Automatically Prompt to Distribute** field, click **Yes**.

Note: If you click **No**, you must select the payment from the ledger and then apply it.

- 6 Click **Save**.

Note: If you select **This Practice Distributes Credits**, you enable the Pre-Payment functionality.

Applying Payments When Posting a Transaction

To apply payments when posting a transaction:

- 1 In the **Post New Payment** window, enter the payment information and click **Post Payment**. The **Apply Payment** window is displayed, showing the amount available to apply.

Terrence Molarnator - Apply Payment

Distribute this payment against completed procedures.
Select procedures below and specify amounts to distribute against each procedure.
Note: You cannot over-distribute the payment.
Any previous distributions to providers (pre-payments) or procedures must be adjusted to free up money to distribute against other procedures.

Credit

Description	Date	Comment/Reference	Amount	Already Ap...	Remaining To Apply
Payment Credit Card	07/23/2020		\$300.00	\$181.00	\$119.00

No pre-payment distributions exist for this credit

Charges

Description	Svc Date	Provider	Ins Claim Ref	Amount	Other P...	Apply
D0272 - bitewings - two radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000043P	\$58.00	\$0.00	\$17.00 <input checked="" type="checkbox"/>
D0220 - intraoral - periapical first radiographic image	08/06/20...	Dr. Jason Parker	1140000000000044P	\$36.00	\$0.00	\$14.00 <input checked="" type="checkbox"/>
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00 <input checked="" type="checkbox"/>
D0273 - bitewings - three radiographic images	08/06/20...	Dr. Kevin Rees	1140000000000045P	\$150.00	\$100.00	\$50.00 <input checked="" type="checkbox"/>

Save Cancel

The **Other Payments** column displays any distributions already made to the charge from other credits. The **Apply** column displays any existing distributions made towards the charge from the selected credit.

Note: When distributing the funds of an insurance payment, the available charges are limited to those for the associated insurance claim.

- 2 Check the box next to the open charges to which you want to apply the payment.
- 3 Enter the amounts in the **Apply** column.

Note: You cannot over-distribute the credit's total funds or over-distribute to a debit.

- 4 Click **Save**.

Note: You can adjust the credit's distributions at any time, adding distributions for new charges or changing existing distributions.

Applying Payments After Posting a Transaction

To apply payments after posting a transaction:

- 1 On a patient's tab, select **Financials > Ledger**. The **Ledger for** window is displayed.
- 2 Select a payment to view the details.

Ledger		Last Payment		N/A				
for Terrence Molarnator		Last Statement		\$8,532.58 (Jun 11, 2020)				
		Next Appointment		Not Scheduled				
Current Balance	Contract Balance	Total Balance	0-30 Days	31-60 Days	61-90 Days	91+ Days	Insurance Due (inc. write-offs)	Patient Due
-\$77.42	\$0.00	-\$77.42	-\$77.42	\$0.00	\$0.00	\$0.00	\$0.00	-\$77.42
Paid in Full								
Trans Da...	Svc Date	Code	Description	Amount	Current	Total		
09/01/2020	09/01/2020	Insurance	Payment Insurance - Claim #: 114000000000045P	-\$200.00	-\$77.42	-\$77.42		
07/23/2020	07/23/2020	Credit Card	Payment Credit Card	-\$75.00	\$122.58	\$122.58		
07/23/2020	07/23/2020	Credit Card	Payment Credit Card	-\$300.00	\$197.58	\$197.58		
Payment Details				Adjust This Payment	Apply This Payment	Apply as Pre-Payment	View Distribution Detail	
Trans. Type	Payment	Location	Smiley Dental Surgery	Amount	\$300.00			
Payment Type	Credit Card	Is Split Payment	No	Already Applied	\$181.00			
Posted By	Kevin Rees at 10:43 am	Reference		To be Applied	\$119.00			
		Full Comment						

- 3 Click **Apply This Payment**. The **Apply Payment** window is displayed.
- 4 Check the box next to the charges to which you want to apply the payment.
- 5 Enter the amounts in the **Apply** column.
- 6 Click **Save**.
- 7 To view distribution details, select the payment in the ledger and click **View Distribution Detail**.

Tracking Applied and Unapplied Payments

To track applied and unapplied payments:

- 1 From the **Location** tab, select **Financials > Applied Payments**.
- 2 Do one of the following:
 - To track applied payments, under **Actions**, click **Print Applied Payments Report**.
 - To track unapplied payments, under **Actions**, click **Print Unapplied Payments Report**.
- 3 After the report is generated into a **.PDF** file, you can print it.

Adjusting Payments Posted in Error

- 1 Find the patient for whom you want to adjust a payment and click **Patient Record** on the menu bar.
- 2 Select **Financials > Ledger**. The **Ledger for** window is displayed.

The screenshot shows the 'Ledger for Testy Test' window. At the top, there is a navigation bar with 'Home', 'Patient Record', 'Medical History', 'Insurance', 'Clinical', 'Financials', 'Treatment Plan', 'Patient Files', and 'Notes'. Below this, the patient's name 'Testy Test' and contact information '(470) 481-7824' are displayed. The main area is divided into two sections. On the left is an 'Actions' sidebar with options like 'New Charge', 'New Payment', 'Post Completed Work (0)', 'Adjust Balance', 'Create New Claim (1 Unbilled)', 'Print Billing Statement', and 'Print Account History'. On the right, there is a summary of balances: Current Balance (\$960.00), Contract Balance (\$4,250.00), and Total Balance (\$5,210.00). A warning icon indicates 'Aged Balance Exists' with a 0-30 Days period. Below the summary is a table of transactions:

Trans Da...	Svc Date	Code	Description
08/30/2020	08/30/2020	Contract Charge	Aligners
07/30/2020	07/30/2020	Contract Downpayment	Aligners
07/30/2020	07/30/2020	D8090	comprehensive orthodontic treatment of the adult dentition
07/29/2020	07/29/2020	D0210	intraoral - complete series of radiographic images
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment
07/28/2020	07/28/2020	Write-Off	WRITE-OFF: Discontinue Treatment

- 3 Click on the procedure line to view the payment details. The **Payment Details** window is displayed.
- 4 Select **Adjust This Payment** in the upper-right corner of the window. The **Adjust This Payment** window is displayed.

The 'Adjust This Payment' dialog box is shown. It contains the following elements:

- Title: Adjust This Payment
- Text: Please choose the type of adjustment for: Check - \$80.00 - Payment Check
- Buttons: Payment in Error, Wrong Amount, Returned Check
- Field: New Amount (value: \$0.00)
- Field: Comments
- Buttons: Adjust Payment (highlighted with a red box), Cancel

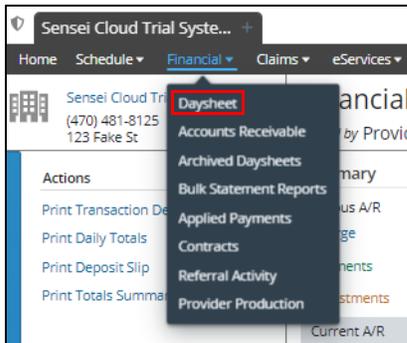
- 5 Select **Payment in Error**, **Wrong Amount**, or **Returned Check**.
Note: **Payment in Error** removes the entire payment; **Wrong Amount** enables you to enter the correct procedure fee; **Returned Check** enables you to apply an **NSF Fee** to the patient's Ledger.
- 6 Enter a note in the **Comments** field.
- 7 Click **Adjust Payment**.

Running the Final Daysheet

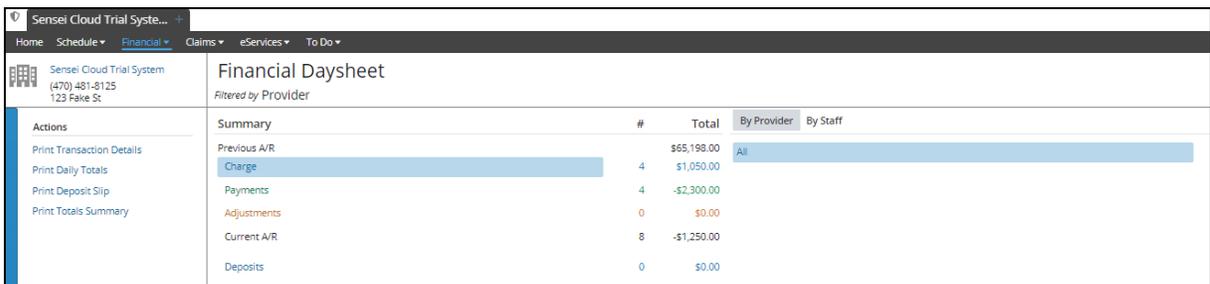
To close the day, you must run the final Daysheet.

To run the Daysheet:

- 1 On the location's **Home** tab, click **Financial > Daysheet**.



The **Financial Daysheet** window is displayed.

A screenshot of the 'Financial Daysheet' window in the Sensei Cloud Trial System. The window title is 'Financial Daysheet' and it is filtered by 'Provider'. The table shows a summary of financial activity with columns for '#', 'Total', 'By Provider', and 'By Staff'. The data rows are: Previous A/R (\$65,198.00), Charge (4 items, \$1,050.00), Payments (4 items, -\$2,300.00), Adjustments (0 items, \$0.00), Current A/R (8 items, -\$1,250.00), and Deposits (0 items, \$0.00). The 'Charge' row is highlighted in blue.

	#	Total	By Provider	By Staff
Previous A/R		\$65,198.00		All
Charge	4	\$1,050.00		
Payments	4	-\$2,300.00		
Adjustments	0	\$0.00		
Current A/R	8	-\$1,250.00		
Deposits	0	\$0.00		

- 2 Verify the information in the Daysheet.
- 3 Click **Close the day for Location** at the bottom of the window. **Close the day for Sensei Cloud Trial System**

Skill Sharpeners

Exercise 1—John Smith owes \$400 after his insurance company pays for his most recent treatment. Post his payment.

To post a payment:

- 1 With John Smith's patient record open, click **Financials**. The **Ledger for John Smith** window is displayed.
- 2 Under **Actions**, click **New Payment**. The **Post New Payment** window is displayed. In the **Amount Paid** field, enter **\$300.00**.
- 3 In the **Location** field, confirm the location.
- 4 In the **Acceptance Date** field, confirm the current date.
- 5 From the **Payment Type** drop-down list, select **Credit Card**.
- 6 In the **Reference** field, enter a reference; for example, **Co-pay**.
- 7 Leave the **Comments** field blank.
- 8 Click **Post Payment**.

Exercise 2—You realize that you have made an error in Mr. Smith's posted payment, so you must correct it.

To correct a payment posted in error:

- 1 With John Smith's patient record open, click **Financials**. The **Ledger for John Smith** window is displayed.
- 2 Click on the payment line to view the payment details. The **Payment Details** window is displayed.
- 3 Select **Adjust This Payment** in the upper-right corner of the window. The **Adjust This Payment** window is displayed.
- 4 Select **Wrong Amount**.
- 5 In the **New Amount** field, enter **\$400.00**.
- 6 In the **Comments** field, type **Corrected dollar amount posted in error**.
- 7 Click **Adjust Payment**.

Exercise 3—At the end of the day, you want to run the final Daysheet.

To run the Daysheet:

- 1 On the location's **Home** tab, click **Financials**.
- 2 Select **Daysheet**. The **Financial Daysheet** window is displayed.
- 3 Verify the information in the Daysheet.
- 4 Click **Close the day for Location**.

