# Sensei Cloud Training Topics

Thank you for your interest in additional training. Use the form below to define the training topics and determine the approximate time your training will require.

Check each item that you would like to include in your training and make notes to help us customize the training for you. Include notes such as your goals; current use; and whether the training is for new team members, new roles, or cross training.

After you complete the form, email it to SalesCoordinators.US@csdental.com. A rep will get back to you within two business days with details and a quote. **Note**: The minimum amount of training that can be purchased is one hour.

If you have any questions before you send the form, please call 800.944.6365.

**Name:** ________________________________ **Practice Name:** ________________________________

**Email Address:** ___________________________ **Phone Number:** ________________________________

☐ **Please contact me about additional training.**

**Note**: All times are approximate, and some topics might overlap.

## ☐ New Employee—General Review (3 hours)

- Adding Patients
- Insurance Overview
- Scheduler Overview
  - Making / Rescheduling Appointments
  - Appointment Openings
  - Managing Schedule View
- Checking Patients In and Out
- Posting Payments and Adjustments
- Daily Routine / Reports

**Notes for New Employee:**

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## ☐ Accounts Receivable Management / Billing Statements (1 hour)

- A/R Report
- Correspondence for Overdue Accounts
- Applying Write-Offs
- Financial Rules
  - Applied Payments
  - Transaction Type Colors
  - Ledger Default Order

**Notes for A/R Management and Billing Statements:**

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- Reading a Patient's Ledger
- Billing Statements
  - Individual Patient vs. Entire Practice
  - Filters
  - Generate Statements > Billing Statement Settings

## ☐ Detailed Insurance Plan Setup (1 hour)

- Adding Payers
- Adding Plans
- Insurance Plan Estimation
  - Indemnity, PPO, DMO, Medicaid
  - Filtering
  - Adjusting All Procedures
  - Importing Values
  - Limitations

**Notes for Insurance Plan Setup:**

## ☐ Insurance Tracking and Management (30 minutes)

- Insurance Claim Rules (Administration)
- Posting Insurance Payments
  - Billing Secondary
- Unbilled Procedure Report
- Claims Management
  - Cancelling Claims
  - Resubmitting Claims
  - Updating Status
  - Filtering

**Notes for Insurance Tracking and Management:**

## ☐ Posting Payments and Adjustments (30 minutes)

- Patient Payments
- Insurance Payments
- Adjusting Balances
- Reading a Patient's Ledger
- Correcting Ledger Entries
- Printing an Account History
- Printing an Individual Billing Statement

**Notes for Posting Payments and Adjustments:**

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## ☐ Treatment Planning (30 minutes)

- Creating Treatment Plans
- Submitting Pre-Determinations
- Printing Treatment Plans
- Scheduling from Treatment Plans
- Tracking Treatment Plans

**Notes for Treatment Planning:**

## ☐ Recare Management (30 minutes)

- Review Recare Settings
- Generate Recare for Unscheduled Patients
  - Filtering the List
  - Letters
  - Emails

**Notes for Recare Management:**

## ☐ Reports (30 minutes)

- Daysheet
- Accounts Receivable
- Archived Daysheets
- Provider Production
- Referral Activity
- Dashboard Reports

**Notes for Reports:**

## ☐ Creating and Utilizing Correspondence Templates (30 minutes)

- Creating Correspondence Templates
- Sending Correspondence
- Previewing / Deleting / Downloading Correspondence

**Notes for Correspondence Templates:**

## ☐ Lab Tracking (30 minutes)

- Creating Lab Cases
- Tracking Outstanding Lab Cases
  - Filtering
  - Updating / Closing

**Notes for Lab Tracking:**

## ☐ Referral Tracking (30 minutes)

- Adding a Patient Referral Source
- Referral Activity Tracking

**Notes for Referral Tracking:**

## ☐ Setting Up Ortho Contracts (30 minutes)

- Creating Ortho Contracts
- Printing Contracts
- Submitting Ortho Pre-Determinations
- Activating Contracts
- Pre-Paying Contracts
- Cancelling Contracts

**Notes for Ortho Contracts:**

## ☐ Clinical Charting (2 hours)

- Hard Tissue Chart
  - Clinical Rules (Administration)
  - Tooth Numbering System (Administration)
  - Current / Planning
  - Charting Conditions and Procedures
  - Adding / Editing Watches
  - Viewing the Legend
  - Printing Clinical History
  - Clinical Notes
- Treatment Chart
- Soft Tissue Chart
  - Record New Exam
  - View Legend
  - Manage Conditions
  - Add New Findings
- Perio Chart
  - Exam Settings
  - Problem Thresholds
  - View Legend
  - Adding New Charts
    - Pockets
    - Gingival Margin
    - Furcation
    - Bleeding
    - Suppuration
    - Mobility
- Prescriptions, if applicable

**Notes for Clinical Charting:**

- Orthodontic Clinical Summary
  - Begin New Treatment
  - Adding Notes
  - Mechanics Tracking
  - Aligner Tracker