

DENTRIX ASCEND

Release Notes: May 19, 2022 (Prod 392)

This release introduces a new Power Report for tracking your success with collections and a new option to require the **placement date** and **months remaining** for orthodontic procedures. There is also a new user right to allow you to edit a patient's chart number after the number has been saved.

Power Reporting

Named Date Fields

Earlier versions of power reports were sometimes confusing when date fields were included, because in the report column headers the name was just "Date" with no hint of which date type was represented. With this update, descriptions have been added to the field names of Ledger-related reports. For example, the Applied Date fields are now named Day (Applied), Month (Applied), and Year (Applied).

Power Reporting > Applied Collection ★

Available fields (131) for: Ledger

Find: View ▾

Applied Date (YMD)

- Year (Applied)
- Month (Applied)
- Day (Applied)

Applied Date (local)

- Date (Applied)

Layout

Rows

- Provider
- Year (Applied)
- Month (Applied)
- Applied Date

Drop Level Here

Columns

Drop Level Here

3 Filters

- Month (Applied) includes previous Month (Applied)
- Production or Collection includes Collection
- Provider excludes n/a

| Provider | Year (Applied) | Month (Applied) | Applied Date |
|----------------------------|----------------|-----------------|--------------|
| Frankenhoff, Allys... | 2022 | Apr | 04/14/2022 |
| Frankenhoff, Allyson Total | | | |
| Grand Total | | | |

These date field names were also automatically updated in your custom reports.

New Collection Success Report

A new report has been added to the Financial section of Power Reporting. The purpose of the new Collection Success Report is to survey the various locations in a multisite practice over the past 12 months to see how successful they were at collecting production revenue. The report includes prepayments and unallocated monies. When you view the report, you will see only the locations that you have the rights to view.

Power Reporting > Collection Success ★

2 Filters

- Month (Service) includes current Month (Service) and previous 11 Month (Service)
- Revision History includes Current

| Location | Year (Service) | Month (Service) | Production | Collection | Collection Success |
|---------------------------------------|----------------|-----------------|--------------|---------------|--------------------|
| Dental Group of Washakie County | 2022 | Jun | \$72,550.92 | -\$71,769.72 | 99% |
| | | Jul | \$90,060.96 | -\$87,069.16 | 97% |
| | | Aug | \$87,084.61 | -\$82,338.71 | 95% |
| | | Sep | \$81,921.19 | -\$74,771.06 | 91% |
| | | Oct | \$85,885.48 | -\$66,422.58 | 77% |
| | | Nov | \$40,478.75 | -\$12,396.70 | 31% |
| Dental Group of Washakie County Total | | | \$457,981.91 | -\$394,767.93 | 86% |

The values on the Collection Success Report appear as a percentage and reflect the Collection amount divided by the Production amount. Conditional formatting makes it easier to see relative success: green is better; red is worse.

You can customize the baseline report to limit the scope to a specific location, change the date range, break out collection by provider, and so on.

Deposit Report Updated

The Power Reporting version of the Deposit Report has been updated to include fields recently added to the standard Deposit Slip Report located on the Home menu. Now both reports include the patient's name, electronic transaction ID, and payment reference information (for example, check number). The updated power report will be easier to compare with the Deposit Slip Report.

Power Reporting > Deposit Report ★

5 Filters

| Subcategory | Trans Date | Primary Guarantor | Patient | Claim Carrier | Transacti... ID | Payment Reference Info | Payment |
|---------------------------|------------|-------------------|---------|---------------|-----------------|------------------------|---------|
| Check Payment | | | | | | | |
| Check Payment Total | | | | | | | |
| Insurance Payment - Check | | | | | | | |

Credit Card Processed Payments Report Updated

The columns of the Credit Card Processed Payments Report have been rearranged to resemble the Integrated Payments Report located on the Home menu.

Insurance

Require Orthodontic Treatment Information

Insurance claims are more successful when you include as much information about procedures as possible. For orthodontic procedures, Dentrix Ascend includes treatment fields that populate the ancillary claim fields.

The screenshot shows the 'Edit Procedure (+)' window. The 'Orthodontic Treatment' section is highlighted with a red box. It contains the following fields:

- Orthodontic treatment
- Placement: 05/09/2022
- Months remaining: 24

This update introduces the option to require a placement date and months remaining for an orthodontic procedure. This new feature also includes warnings and new windows that are intended to remind you to enter orthodontic treatment information.

You can make the orthodontic fields required for selected procedures by turning on a new switcher in the procedure code editor. To enable the **Required treatment info** feature, open the Settings menu and select **Procedure Codes & Conditions**. Enter the procedure code or description in the search bar to search for orthodontic procedure codes.

The screenshot shows the 'Procedure Codes & Conditions' window. The search bar contains 'orthd' and is highlighted with a red box. Below the search bar is a table of orthodontic procedure codes.

| ADA Code | Description | Office Code | Category | Treatment Area | Location Fee | Favorite |
|----------|---------------------------|-------------|--------------|----------------|--------------|----------|
| D8010 | Limited Ortho for Primary | LimitPrim | Orthodontics | Mouth | \$3,000.00 | ★ |
| D8020 | Limited Ortho for Mixed | LimitMix | Orthodontics | Mouth | \$381.00 | ★ |
| D8030 | Limited Ortho for Teen | LimitAdol | Orthodontics | Mouth | \$381.00 | ★ |
| D8040 | Limited Ortho for Adult | LimitAdlt | Orthodontics | Mouth | \$5,000.00 | ★ |

Select an orthodontic procedure to open its Edit Procedure Code window. By default, the **Require treatment info** switcher is set to No for all orthodontic procedures. Toggle the **Require treatment info** switcher to **Yes** and click **Save** to require users to input the **Placement date** and **Remaining months** when the procedure is posted.

Automated warnings and windows will now appear on the following pages if you try to post or complete a procedure but do not have the required orthodontic treatment information entered:

- Chart
- Treatment Planner (from the Edit Procedure window)
- Routing Panel (from the Chair and Checkout Statuses)
- Progress Notes
- Ledger (from the Patient Walkout)

Chart

The screenshot shows the 'Add Procedure' form with a modal window for 'Orthodontic Treatment'. The modal contains the following fields:

- Placement * (MM/DD/YYYY)
- Months remaining * (with + and - buttons)
- Post button
- Cancel button

The background form shows 'Tx Plan' selected, 'Completed' status, and procedure code 'D8090'.

Treatment Planner and Routing Panel

The screenshot shows the 'Edit Procedure (+)' form with the following details:

- Transaction date: 05/10/2022
- Provider: Nate - Nate Miller
- Status: Completed
- Procedure: D8090 - Comprehensive Ortho for Adult
- Bill to insurance: On
- Amount: \$ 5,000.00

The right-hand panel includes 'Options', 'Insurance Estimates', and 'Diagnosis' tabs. Under 'Start/Completion Dates', there are checkboxes for 'Require start/completion dates' and 'Orthodontic treatment'. The 'Orthodontic Treatment' section has a 'Placement *' field and a 'Months remaining *' field.

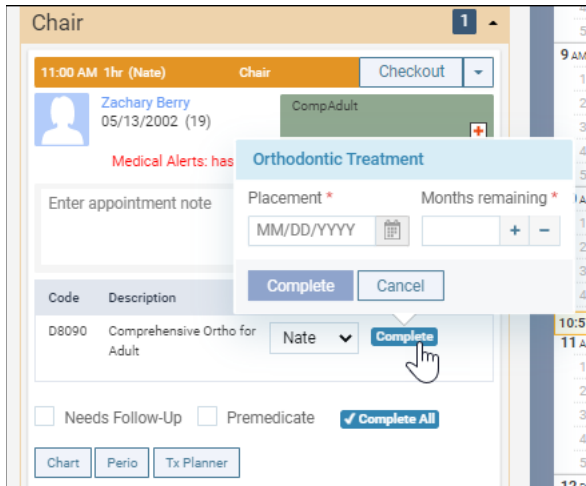
Progress Notes and Routing Panel

The screenshot shows the 'Progress Notes' panel with a table of procedures and a modal for 'Orthodontic Treatment'.

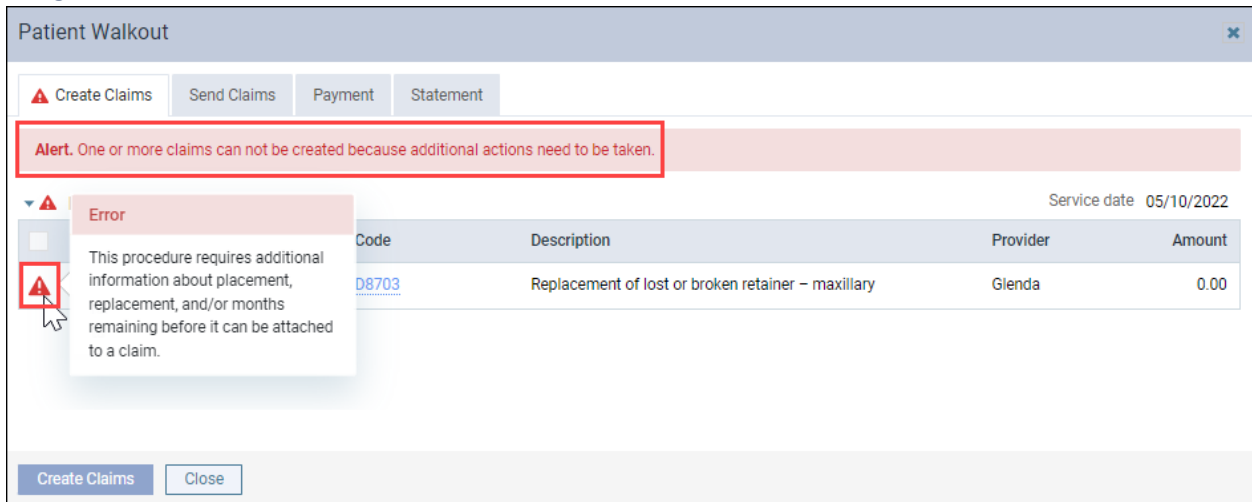
| Date | Th | Surface... | Code | Description | Status | Provide... | Amount |
|------------|----|------------|-------|-------------------------------|---------|------------|----------|
| 05/10/2022 | | | D8090 | Comprehensive Ortho for Adult | Tx Plan | Nate | 5,000.00 |

The modal for 'Orthodontic Treatment' contains:

- Placement * (MM/DD/YYYY)
- Months remaining * (with + and - buttons)
- Complete button
- Cancel button



Ledger

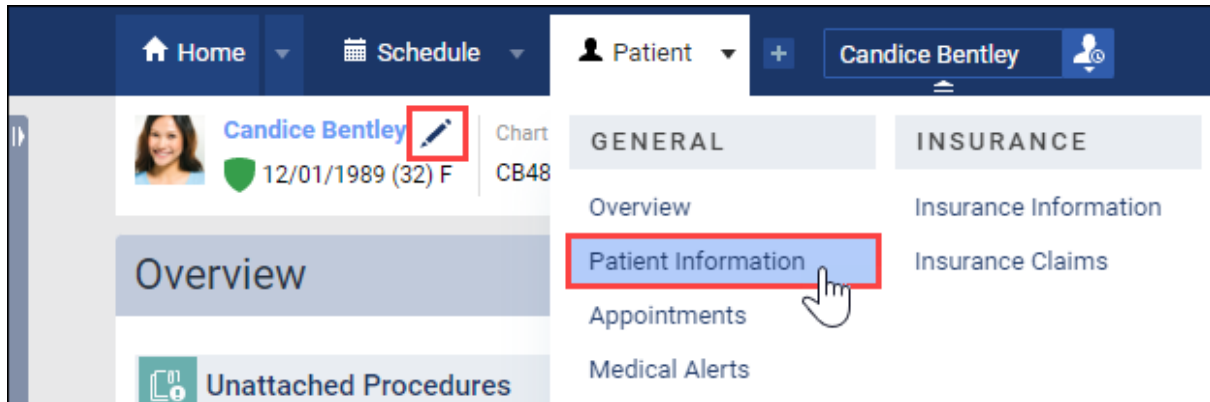


Patient Information

Editing the Chart Number

In the past, once you entered a chart number and clicked **Save**, you could not edit the chart number. As of this release, users with the applicable right can now edit the chart number assigned to a patient.

To get to the chart number, from the Patient menu, select **Patient Information**, or click the pencil icon next to the patient's name on the patient information ribbon.



To edit the chart number, click the pencil icon next to the chart number field, edit the field, and click **Save**.

Patient Information

| | | | | |
|------------------|-------------------|------------------|-------------|-----------------------------|
| Basic Info | First name * | M.I. | Last name * | Address * |
| Related Patients | Candice | | Bentley | 123 Main |
| Medical Alerts | Preferred name | Title | Suffix | |
| Patient Forms | | | | City * State * ZIP code * |
| Preferences | Gender * | Birthdate * | Status | Pleasant Grove UT 84062 |
| Referrals | Female | 12/01/1989 | Active | Phone type Phone number Ext |
| Notes | Chart # | First visit | Last visit | Mobile (801) 555-2526 |
| | CB4876V | 03/31/2022 | 04/25/2022 | Add Phone |
| | Social Security # | Primary provider | | Email |
| | ###-##-#### | <Please Select> | | candice.bentley@email.com |
| | Discount plan | | | |
| | [None] | | | |
| | Save | Cancel | | |

A chart number can contain any combination of letters and numbers. A warning message appears if a chart number is in use by another patient.

Patient Information The entered chart number is already in use by another patient.

Basic Info

First name * Paige M.I. Last name * Bentley

Address * 123 Main

Preferred name Title Suffix

City * Pleasant Grove State * UT ZIP code * 84062

Gender * Female Birthdate * 01/01/2001 Status * New

Chart # ⚠ TSJHGD

First visit Last visit

MM/DD/YYYY MM/DD/YYYY

Social Security # i Primary provider aleded - Alex Lebed

Discount plan [None]

Save Cancel

Changes to chart numbers are recorded in the Audit Log.

Notes on Rights

- For existing users, if you have the **Update patient information** right and the **Access Social Security #** right, the **Edit patient chart #** right will automatically be turned on for you with this update.
- Going forward, users must have the **Update patient information** right selected and the **Edit patient chart #** right selected to edit the chart number.

User Roles

Available Roles Create New

- Administrator
- Billing Coordinator
- Dental Assistant
- Front Office
- Limited Access
- Office Manager
- Provider
- Receptionist
- Tester

Admin - Assigned Access Rights

Role name * Admin

Full List

| Security Category | Assigned Access Rights |
|---|--|
| <ul style="list-style-type: none"> ▼ Patient Information | <ul style="list-style-type: none"> ● Create a patient ● Review recare procedures ● Access Social Security # ● Create med ● Manage rec |
| <input checked="" type="checkbox"/> All available rights | |
| <input checked="" type="checkbox"/> Create a patient | |
| <input type="checkbox"/> Update patient information | |
| <input type="checkbox"/> Edit patient chart # i | |

Please select "Update patient information" to enable this right.

User Rights

This release introduces the new right **Edit patient chart #**. Users with this right will be able to edit a patient's chart number after the number has been saved.

New Learning Content

The Practice Education team is constantly building new content to support you. The following resources were recently added to the Dentrix Ascend Resource Center:

Videos

- [Creating a Custom Letter Template](#)
- [Adding Required Attachments to Claims](#)
- [Setting Up Predetermination Reminders](#)

Blog Tips

- [Refreshing the Status of a Claim](#)
- [Configuring Discount Plan Expiration Notifications](#)

Webinar

- [Getting the Right Numbers in the Dentrix Ascend Treatment Planner](#)