

# DENTRIX ASCEND

## Release Notes: April 26, 2022 (Beta 391)

The product update released April 26, 2022 includes the ability to block multiple operatories when you are creating an event. This release includes updates to help when you are adding an age limitation to a procedure. This release also includes a new Credit Card Processed Payments report in Power Reporting.

### Calendar

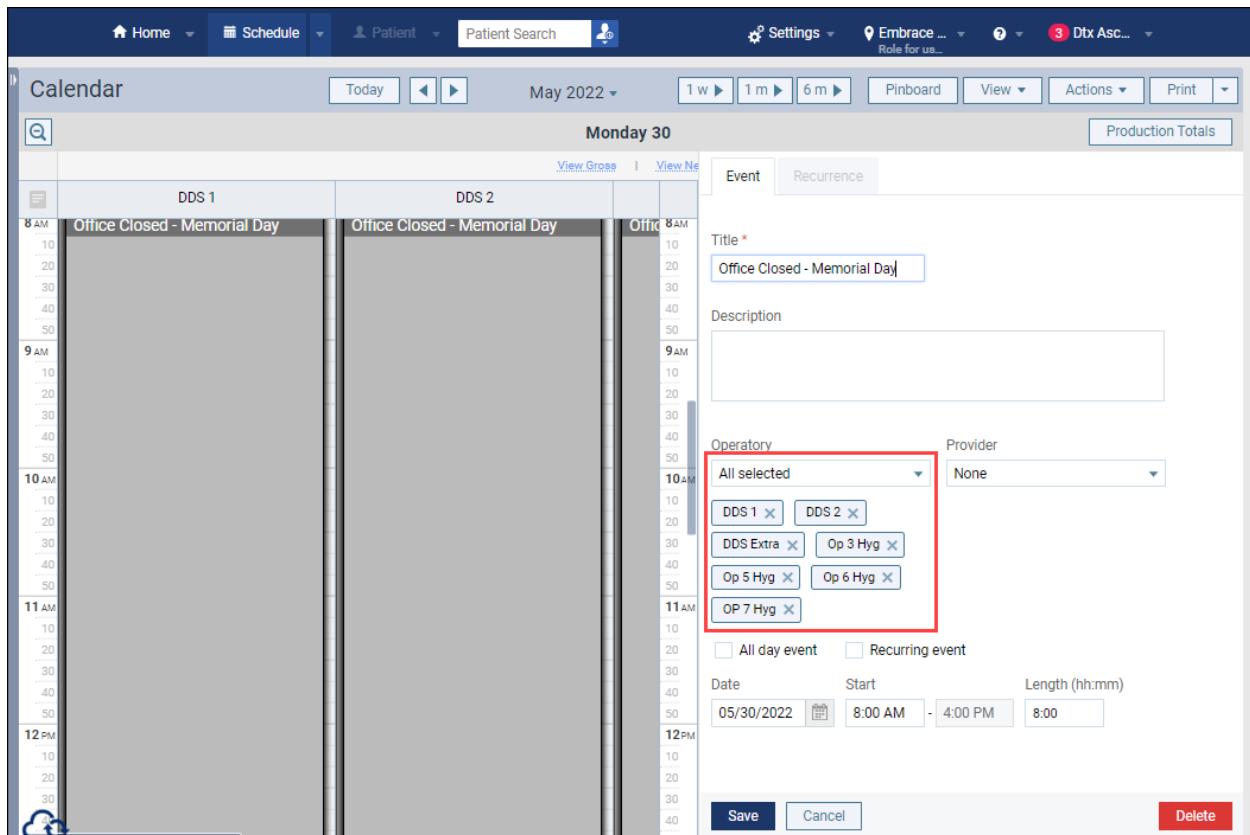
#### Blocking Multiple Operatories

With this release, you can now block multiple operatories in one event. This will save you time when you need to create an event for multiple operatories at once, such as for early closures, meetings, holidays, and lunch breaks.

When you need to block multiple operatories for an event, expand the **Operatory** list, and select the checkboxes for the operatories you want to include, or select the checkbox at the bottom of the list to select all operatories. Then, click **Apply Selected**.

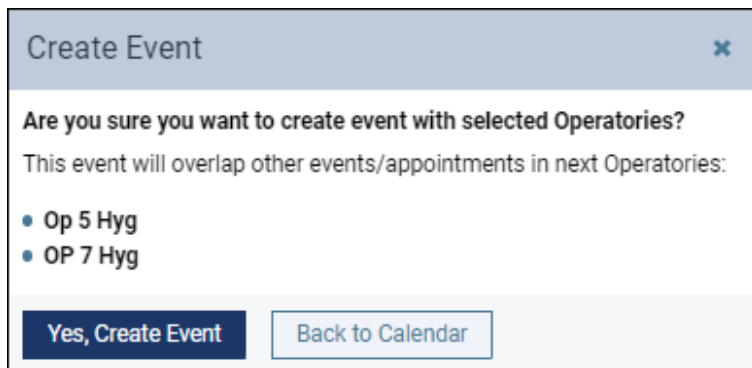
The screenshot displays the Dentrix Ascend Calendar interface. The main calendar view shows a grid for Monday, May 30, 2022, with two greyed-out blocks labeled 'Office Closed - Memorial Day' for DDS 1 and DDS 2 between 8 AM and 10 AM. An event creation modal is open on the right side of the screen. The modal has a title field containing 'Office Closed - Memorial Day' and a description field. Below these fields are two dropdown menus: 'Operatory' and 'Provider'. The 'Operatory' dropdown is expanded, showing a list of operatories with checkboxes: DDS 1, DDS 2, DDS Extra, Op 3 Hyg, Op 5 Hyg, Op 6 Hyg, OP 7 Hyg, and 'Apply Selected'. The 'Apply Selected' option is checked and highlighted with a red box. The 'Provider' dropdown is set to 'None'. At the bottom of the modal, there are 'Save' and 'Cancel' buttons. The 'Length (hh:mm)' field is set to 9:00 AM and 1:00.

391\_apply\_selected



391\_all\_selected

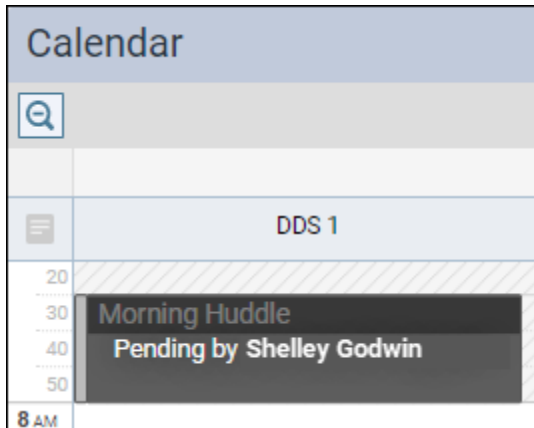
When you are done configuring your event, click **Save**. If there are other events or appointments in the operatories you selected that conflict with the event you are adding, a Create Event window will open to alert you. You can either select **Yes, Create Event** to bypass the notification or select **Back to Calendar** to make changes to the event.



391\_create\_event

### Pending Message

This update introduces a new pending message for events. Now, when you are editing an event, other staff members will see a pending message on the event in the calendar. When the pending message appears, other staff members will not be able to open or edit the same event. This new feature helps you to avoid any interruptions or conflicts when you are editing an event.



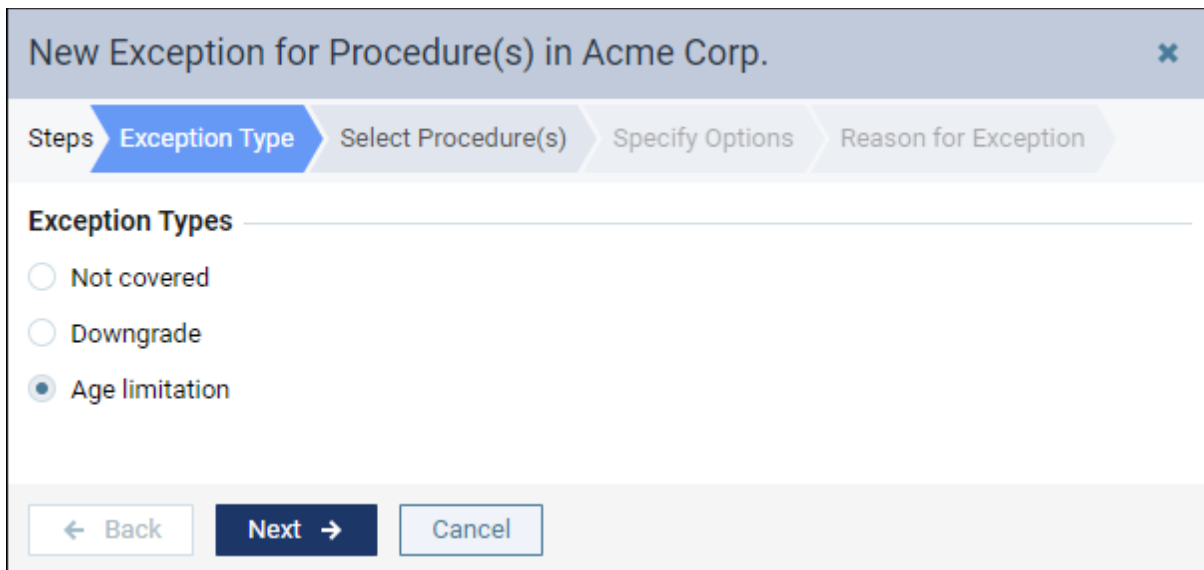
391\_message\_pending

## Insurance

### Coverage Exception Update

The New Exception window that helps define coverage table exceptions has been modified in anticipation of several new capabilities. The intent of these changes is to increase the accuracy of insurance estimate calculations and thereby increase treatment plan acceptance rates.

In the Exception Type step, instead of selecting an individual procedure code, you will select the type of exception you will be adding first.



[image:391\_exception\_type.png]

In this update a new Select Procedure(s) step has been added, where you can select the procedure or procedures to which the exception applies. A search field allows you to look up procedures by code or by name the same way it does in other places in Dentrix Ascend. There is also a checkbox at the top of the column that allows you to select all or clear all selections. **Tip:** you can Shift+click to select a range of procedure codes.

New Exception for Procedure(s) in Acme Corp. ✕

Steps Exception Type **Select Procedure(s)** Specify Options Reason for Exception

**Selected Exception Types**

Age limitation

**Add Procedure(s) (4)** i

fluoride ✕

<input checked="" type="checkbox"/>	Code	Description	Category	Treatment Area	EXC
<input checked="" type="checkbox"/>	D1206	Topical Applic Fluoride Varnish	Preventive	Mouth	
<input checked="" type="checkbox"/>	D1208	Topical Application of Fluoride	Preventive	Mouth	
<input checked="" type="checkbox"/>	D5986	Fluoride Gel Carrier	Maxillo Prosth	Mouth	
<input checked="" type="checkbox"/>	Fluoridex	Fluoridex paste/rinse	Adjunct Serv	Mouth	

[image:391\_select\_procedures.png]

In the Specific Options step, you can enter the age in the numeric fields or set a range for the age limitation with the new slider. To save time, you can use the Tab key to switch between fields so that you can add data to each field without clicking into it.

### New Exception for Procedure(s) in Acme Corp. ✕

Steps Exception Type Select Procedure(s) **Specify Options** Reason for Exception

#### Options for Age Limitation

Age limitation

13 Years Min Max 110+ Years

Deductible type

Preventive ▼

Coverage, % 0 % or Downgrade to Search for procedure 🔍

← Back Next → Cancel

[image:391\_specify\_options.png]

You can only add one exception to a procedure code. Once you do, that procedure code is hidden from the Search results as you add more exceptions. In a future release, you will be able to apply multiple exceptions to procedure codes. In preparation for this enhancement, the Manage Exceptions window now lists procedure codes with an expansion arrow so you will be able to see all the exceptions associated with that procedure code; however, at this time there can be only one exception per procedure.

Manage Exceptions for Acme Corp. ✕

Exceptions Search for a procedure by code  Collapse All Add New Exception

Code -> Exceptions	Description	Reason	# of exceptions
▶ D1206			1
▶ D1208			1
▶ D5986			1
▼ Fluoridex			1
Exception Type			
Age limitation	0%, age 13 through 110+	Fluoride covered at 100% for ages 0 -12 and covered at 0.00 for 13 and above.	✕

Done

[image:391\_manage\_exceptions.png]

**Note:** The pre-estimate required functionality was removed from the exceptions table because predeterminations are now configured separately in the [Manage Predeterminations](#) window.

#### Enhanced Coverage Exception Messages

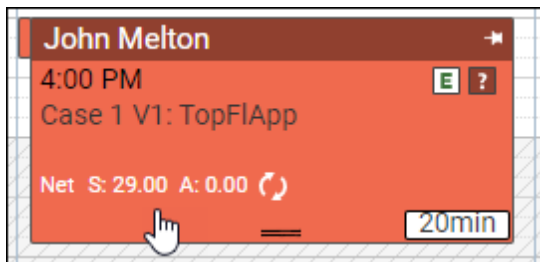
The Ledger and the Treatment Planner have a Detailed View window where you see a breakdown of the patient portion or estimated guarantor portion. Coverage exception messages are also updated in this release. When you click an orange link on the Detailed View page, the Coverage Exception(s) message shows the age limitation details.

Primary Allowable Amount	Primary Coverage, %	Primary Copayment, \$						
	0.000%							
<b>Coverage Exception(s)</b> EXC: Age limitation <table border="1"> <thead> <tr> <th>Coverage</th> <th>Deductible</th> <th>Age Limit</th> </tr> </thead> <tbody> <tr> <td>0.000%</td> <td>Preventive</td> <td>13 - 110+</td> </tr> </tbody> </table> <a href="#">Reason for exception ▶</a>			Coverage	Deductible	Age Limit	0.000%	Preventive	13 - 110+
Coverage	Deductible	Age Limit						
0.000%	Preventive	13 - 110+						

[image:391\_detailed\_view.png]

### Location Production Update

With this update, the location production calculations now include any exceptions you have added to the patient's insurance coverage table.



[image:391\_location\_production.png]

## Power Reporting

### New WorldPay Credit Card Processing Fields in Ledger Reports

The Credit Card Processing fields introduced in Release 390 are now available for both Analysis Reports and Interactive Reports

Power Reporting > Analysis Ledger Report Builder

Available fields (138) for: Ledger

Find:  View

Layout

Rows

- Date
- Transaction Type
- Transaction ID
- Reference Number
- Card Type
- Card Source
- Card Holder
- Account Name

Columns

Measures

2 Filters

- Day includes today and previous 7 Day
- Transaction Type includes Credit Card Payment, Credit Card Refund and Credit Card Void

Date	Transaction Type	Transaction ID	Reference Number	Card Type	Card Source	Card Holder	Account Name
03/27/2022	Credit Card Payment	140145085	2 Test d10w888d31642f8b0d84...	Discover	Online	Test_1	Online Payments
		140146188	1 Test 21c2d3ca8d8d973e886f09...	Amex	Online	Test_3	Online Payments
03/28/2022	Credit Card Payment	140146542	1 Test 11f05615a5e44a0957189b...	Amex	Online	Test_3	Online Payments
		140120181	Sanvile Three 4e79445e5174078...	Mastercard	Online	Three Sam...	Online Payments
		140138646	0001 Patient: b50c07eaf694ab18...	Mastercard	Terminal	Not Available	1096759
		140138847	0001 Patient: 740bde8eb89e49a9...	Amex	Terminal	TEST CARD ...	1096759
		140139050	0001 Patient - 9e582297506c40ae...	Mastercard	Terminal	Not Available	1096759
		140139418	0001 Patient m 44abf189bba0465...	Amex	Terminal	TEST CARD ...	1096759
		140145007	2 Test b63346e4e34b4135ab835a...	Mastercard	Online	Test B 2	Online Payments
		140146106	1 Test 479abb1f38f483b397eef95...	Visa	Online	Test_2	Online Payments
			0001 Patient: 4d2e336a060e45418...	Not Availa...	Terminal	Not Available	1096759
			Sanvile Three 3950e314141414...	Not Availa...	Terminal	Not Available	1096759
			Sanvile Three 87b90e0e6f114c0f...	Not Availa...	Terminal	Not Available	1096759
			Sanvile Three bfc4ab3b202b49bd...	Not Availa...	Terminal	Not Available	1096759
			Sanvile Three ec0373713644915...	Not Availa...	Terminal	Not Available	Online Payments
			2 Test B 206f2c74ae99483b89e7...	Not Availa...	Online	Test_1	Online Payments
			2 Test B 44aa87be3f22410e966e1...	Not Availa...	Online	Test_1	Online Payments
			2 Test B 893e2f1c3b480ca512b...	Not Availa...	Online	Test_1	Online Payments
			2 Test d4f688440e8d79aa955af...	Not Availa...	Online	Test_1	Online Payments
			1 Test A 17789644c24024b6699...	Not Availa...	Online	Test_3	Online Payments
			1 Test A 122474b061c459c941e4...	Not Availa...	Online	Test_3	Online Payments
			1 Test A ebf9a92b267457e903f62...	Not Availa...	Online	Test_3	Online Payments

[image:391\_worldpay.png]

## New Credit Card Processed Payments Power Report

This release introduces a new financial Power Report: Credit Card Processed Payments. This new report allows you to see the credit card transactions for the past week.

Power Reporting > Credit Card Processed Payments

Layout

Rows

- Account Name
- Modified Date
- Card Holder
- Card Type
- Transaction ID
- Card Source
- Reference Number
- Transaction Type

Columns

Measures

Amount

Account Name	Modified Date	Card Holder	Card Type	Transaction ID	Card Source	Reference Number	Transaction Type	Amount
Global Processing	04/18/2022	Tony Ferguson	Discover	143864833	Terminal	Ferguson Tony ad26d673fd7d4...	Credit Card Payment	-\$444.00
			Discover	143872391	Terminal	Blanda George 1b2557f68b174...	Credit Card Payment	-\$100.00
	04/19/2022	Roberto Clem...	Discover	143872484	Terminal	Blanda George 4feeae6b4bf5341...	Credit Card Void	\$100.00
			Mastercard	143864659	Terminal	Oliveira Charles f51e3ffed8d64...	Credit Card Payment	-\$100.00
Jen's CC Processi...	04/19/2022	Frank Robinson	Discover	144235674	Terminal	Clemente Roberto 3c078d81d5...	Credit Card Payment	-\$69.88
			Mastercard	144235906	Terminal	Fingers Rollie 660c733e2cc243f...	Credit Card Payment	-\$247.44
			Amex	144235131	Terminal	Robinson Frank 17fa317349be4...	Credit Card Payment	-\$886.32
			Amex	144237540	Terminal	Robinson Frank 17fa317349be4...	Credit Card Payment	-\$199.99
			Mastercard	144262006	Terminal	Robinson Frank 17fa317349be4...	Credit Card Payment	-\$399.40
			Mastercard	144262706	Terminal	Robinson Frank 17fa317349be4...	Credit Card Void	\$399.40
			Visa	144234864	Terminal	Robinson Frank 17fa317349be4...	Credit Card Payment	-\$677.29
Amex	144234917	Terminal	Robinson Frank 17fa317349be4...	Credit Card Void	\$677.29			
Jen's CC Processing Total			Amex	144234448	Terminal	Willis Patrick b8bd0a398cac45a...	Credit Card Payment	-\$543.86
			Discover	144234636	Terminal	Harbaugh Jim a6260a266fd843...	Credit Card Payment	-\$126.35
<b>Grand Total</b>								<b>-\$2,620.15</b>

[image: 391\_cc\_processed\_payments]

The new Credit Card Processed Payments report is similar to the [Integrated Payments Report](#), which is available from the Home menu. However, there are some important differences.

Credit Card Processed Payments	Integrated Payments Report
<ul style="list-style-type: none"> <li>Shows data for multiple Worldpay accounts at one time</li> <li>Credit card payments are shown as negative values; voids are shown as positive values</li> <li>Customizable</li> </ul>	<ul style="list-style-type: none"> <li>Only shows data for one Worldpay account at one time</li> <li>Credit card payments are shown as positive values; voids are shown as negative values</li> <li>Not customizable</li> </ul>



The fields in this report are linked to the Ledger to allow for advanced customization. As with any Power Report, you can add fields to get additional information. For example, you can add the Patient field to the Credit Card Processed Payment report. This allows you to see whether a credit card payment was allocated to multiple patients, for instance if the payment was split between the guarantor and a dependent.

## User Rights

No new user rights were introduced in this release.

## New Learning Content

The Dentrix Ascend Practice Education Team strives to keep you informed on the latest feature updates and existing features in Dentrix Ascend. Click the title on the resources below to learn more about these features in Dentrix Ascend.

### [Two-way Text Messaging in Dentrix Ascend](#)

The two-way texting feature in Dentrix Ascend allows you to view, send, and reply to text messages for primary patient contacts. Watch this video to learn how to use the two-way text messaging feature in Dentrix Ascend.

### [Scheduling an Appointment for an Existing Patient](#)

Scheduling appointments is one of the most frequent things you do in your practice. Watch this video to see how Dentrix Ascend makes it easy to set up a patient appointment.

### [Acquiring Images](#)

In case you missed it, watch this updated video to learn the new acquiring images workflow with the recent release updates.