

# DENTRIX ASCEND

## Release Notes: November 08, 2022 (Prod 399-400)

This release introduces an enhancement to your recare management workflows by allowing note entry. Filtering the Day Sheet by provider now limits the detailed transaction list so you can focus on specific providers' transactions. The timeframe settings for Patient Communications have been updated, and the experience of viewing Patient Forms has been improved.

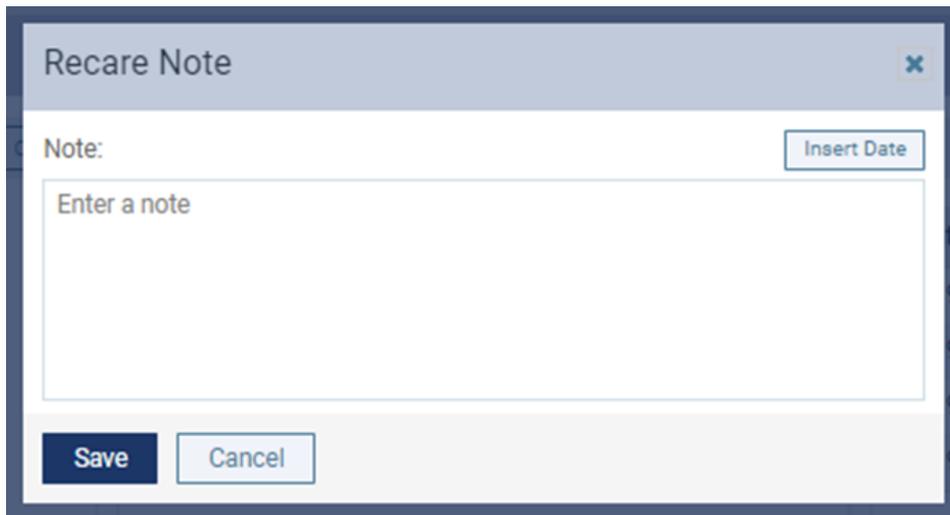
### Recare

#### Recare Note Enhancement

You can now add a **Recare Note** to record thoughts, progress, and next steps for a patient's recare record in three places in Dentrix Ascend:

- Patient's Recare page
- Patient's Overview page
- Recare Management page

The Recare Notes feature helps you as you follow up and communicate with patients.



The screenshot shows a modal dialog box titled "Recare Note". At the top right of the dialog is a close button (an 'x' icon). Below the title bar, there is a label "Note:" followed by a text input field. To the right of the input field is a button labeled "Insert Date". The input field contains the placeholder text "Enter a note". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

399\_recare\_note

#### Recare Page

To add a note on the patient's Recare page, select the recare type. In the **Note** field, add a note, or edit an existing note. Click **Insert Date** to add the date if needed. Then, click **Save**.

Recare Add New Recare

Type	Due Date	Appointment	Interval
BITEWINGS	10/27/2023	Unscheduled	1 Yr
FMX	09/20/2025	Unscheduled	3 Yrs

### BITEWINGS

Added after procedure completion on 10/26/2022  
annual bitewings

Due Date:

Appointment:  ↗

Interval:  + -

Note:

399\_patient\_recare\_page

### Patient Overview Page

To add a note on the patient's Overview page, locate the **Recare widget**, and click the new **note icon** for a recare type.

The screenshot shows a patient overview dashboard with several widgets. The 'Recare' widget is highlighted with a red box. It contains a table with the following data:

Type	Due Date	Appointment	Note
BITEWINGS	10/27/2023	Unscheduled	
FMX	09/20/2025	Unscheduled	

399\_recare\_widget

A Recare Note dialog box opens. You can add a note or edit an existing note. Then, click **Save**.

### Recare Management Page

A new note column has been added to the Recare Management page so you can add a note to the patient's recare record.

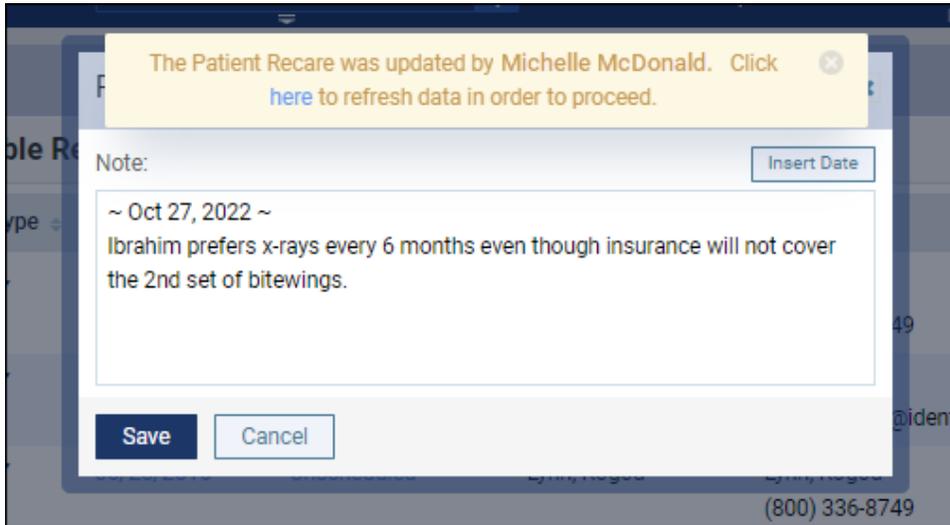
The screenshot shows the 'Recare Management' page. On the left, there are filters for Locations, Patients, and Appointment. The main area displays a table of 'Available Records' with the following data:

Recare Type	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted	Note
PROPHY	04/13/2016	Unscheduled	Barr, Ibrahim	Barr, Ibrahim (800) 336-8749	01/12/2016		
PROPHY	04/21/2016	Unscheduled	Welch, Terri	Welch, Terri do_not_reply@ident.c...	01/20/2016		
PROPHY	06/25/2016	Unscheduled	Lynn, Kogod	Lynn, Kogod (800) 336-8749			
PROPHY	09/29/2016	Unscheduled	Dillon, Fred	Dillon, Fred (800) 336-8749	09/22/2016		

399\_recare\_management\_report

Click the **note icon** to add your note. A Recare Note dialog box opens. You can add a note or edit an existing note in the note field and click **Insert Date** to add the date if needed. Then, click **Save**.

In all three places, if another staff member is adding a note at the same time for the same patient, the other staff member will see a warning message and must click **here** (in blue) to refresh the note before they can add and save their note.



399\_recare\_note\_refresh

**Note:** A blue note icon means that the patient has a recare note. A white note icon means that the patient does not have a recare note.

Recare				Ledger			
Type	Due Date	Appointment	Note	0 - 30	31 - 60	61 - 90	Over 90
BITEWINGS	10/27/2023	Unscheduled	 — Has a recare note.				
FMX	09/20/2025	Unscheduled	 — Does not have a recare note.				

399\_recare\_note\_icons

## Patient Communications

### Updates to Appointment Start Date and Time in Patient Communications

In the Patient Communications settings, you can set up appointment reminders to be sent a specific number of hours, days, weeks, or months before or after a specific event. These events include:

- Appointment Scheduled Date
- Appointment Confirmed Date
- Appointment Start Date and Time
- Appointment Completed Date
- Appointment Broken Date
- Appointment No Show Date

The screenshot shows the 'Edit Reminder' configuration page. On the left, there are several reminder types: 'Appt confirmed', 'Appt scheduled', 'Appt start' (selected), and 'Appt completed'. The main area shows the configuration for the selected reminder. A dropdown menu is open, listing events: 'Appointment Start Date and Time', 'Appointment Scheduled Date', 'Appointment Confirmed Date', 'Appointment Start Date and Time' (selected), 'Appointment Completed Date', 'Appointment Broken Date', and 'Appointment No Show Date'. The selected option is highlighted in blue. The number '3' is also highlighted in a red box next to the 'days' unit.

399\_patient\_comms\_dropdowns.png

This release introduces an update to prevent patients from receiving communications during times that are significantly outside of business hours. As of this release, you can choose a number of hours only for the **Appointment Start Date and Time** event. The maximum number of hours you can choose is 3 hours. This is to prevent patients with early appointments from receiving communications from your office early in the morning. The hours option is no longer available for other events.

### Implications for Existing Reminders

Existing reminders linked to the Appointment Start Date and Time event:

- If you selected a timeframe between 1 and 3 hours, the timeframe would not change.
- If you selected a timeframe over 3 hours, the timeframe will be changed to 1 day.

Existing reminders linked to all other events:

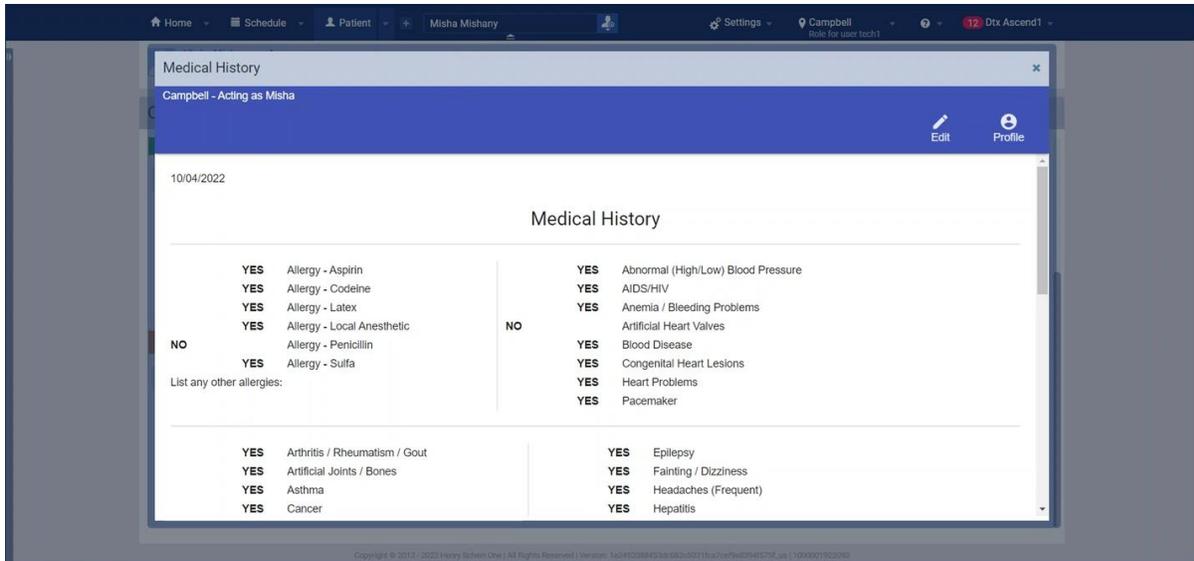
- If you selected a timeframe using the hours selection, the timeframe will be changed to 1 day.

## Clinical

### Patient Forms Window Enhancements

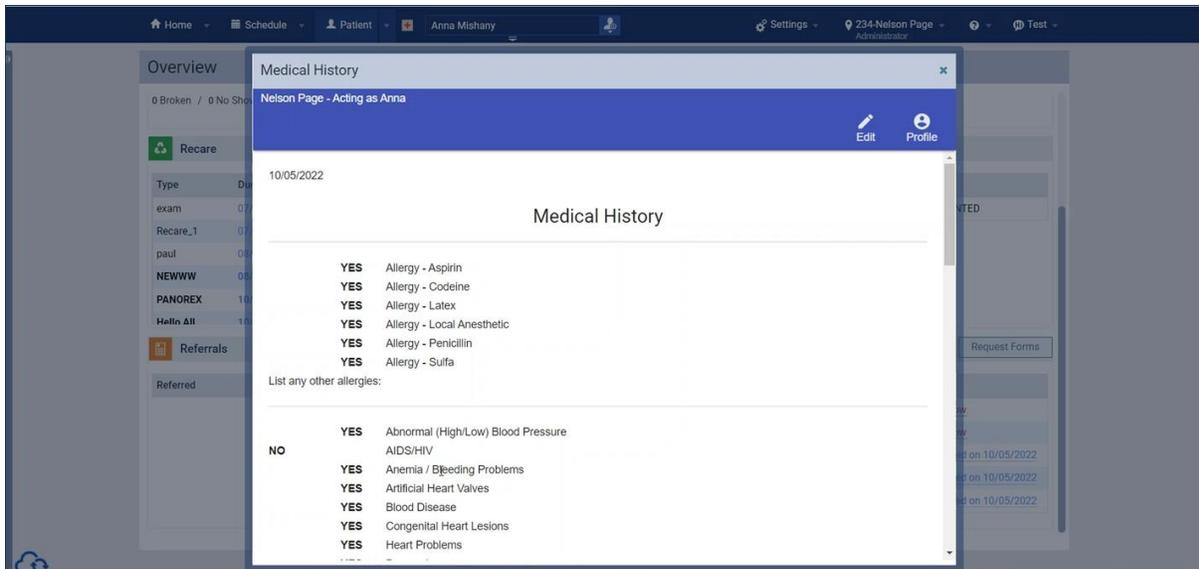
The window size has increased for all patients forms. This enhancement helps you review and analyze more information at one time and minimizes scrolling when you are reviewing a patient form.

#### New Window Size



399\_new\_window\_size.png

Old Window Size



399\_old\_window\_size.png

## Financial

### Default Tags Added for Insurance Credit Card Payments

When entering a payment in a patient's ledger, if you select the **Insurance Payment - Credit Card** method, you will now automatically be prompted to choose a tag for the credit card type. The default tags include VISA, American Express, Discover, and MasterCard.

Home Schedule Patient Stephen Shapiro Settings District Perio Dtx Ascend7

### Enter Payment (-)

Transaction date \* 10/28/2022 Transaction ID

Balance	Insur. Portion	Write-Off	Patient Portion
373.00	- 307.60	- 0.00	= 65.40

Amount \* \$ 0.00

Method \* Insurance Payment - Credit Card Claim \* 11/10/2021 BCF178 Stephen  Additional payment(s) expected later from insurance

Insurance Adjustment	Adjustment Type	Amount
None	None	\$ 0.00

Transaction Date	Patient	Provider	Tooth	Surface	Code	Description	Charge	Other Credits	Guar Estimate	Applied	Balance
11/10/2021	Stephen Shapiro	Kate			0002	Prevent	22.00	0.00	22.00	0.00	22.00

Tags Xfer Reason(s) Notes

Mandatory tag(s) (Select one)

VISA American Express Discover MasterCard

Amount not applied 0.00  
Amount applied 0.00

Save Cancel

Image: 400\_default\_tags.png

To edit the default tags, from the **Settings** menu, select **Ledger Options**.

Settings District Perio Dtx Ascend7

LOCATION	PRODUCTION	PATIENT CARE
Location Hours	Coverage Tables	Clinical Note Templates
Location Information	Fee Schedules	Medical Alerts Library
Patient Forms	Insurance Defaults	Patient Communications
Operatories	Procedure Codes & Conditions	Prescriptions
User Accounts	Ledger Options	Recare
User Roles	Discount Options	Referral Sources

Image: 400\_ledger\_options.png

Click the pencil icon next to the **Insurance Payment – Credit Card** option.

Ledger Options			
Transaction Types		Ledger Rules	
Payment Methods		Charge Adjustment	
<input checked="" type="checkbox"/>	Insurance Payment - Check		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Insurance Payment - Electronic		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Insurance Payment - Credit Card		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Check Payment		<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

Image: 400\_ledger\_options\_edit.png

In the dialog box, edit, add, or delete tags as needed. Then click **Save**.

### Edit Insurance Payment - Credit Card Method

Active

**Tagging Rules**

Tag restriction rules  On-demand tag creation  i

**Tag Restriction Rules**

**Information.** If no tags are specified below, tagging capabilities will be disabled for this payment method.

Mandatory tag(s)

VISA x

Discover x

American Express x

MasterCard x

Optional allowed tag(s)

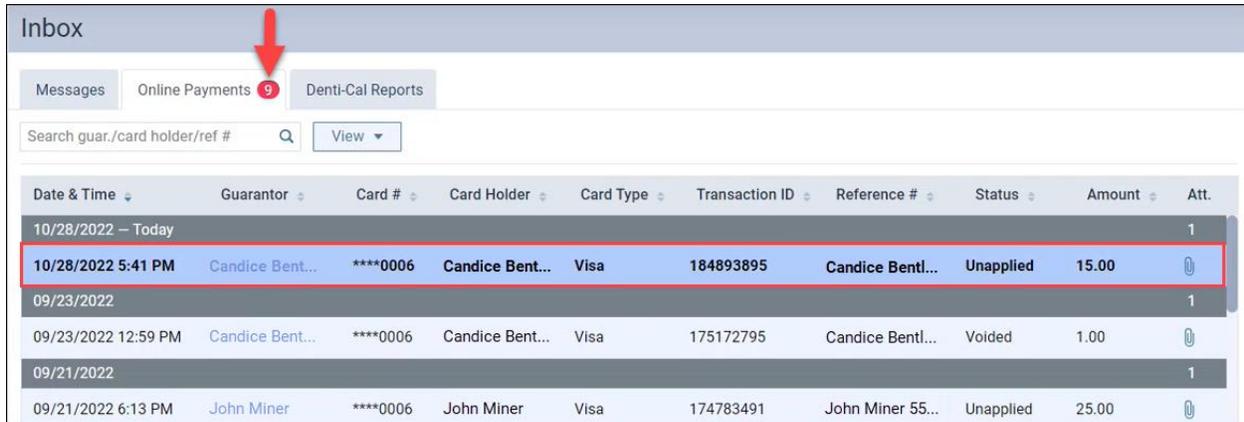
Image: 400\_ledger\_options\_tags.png

We received lots of feedback on this feature, and many customers indicated that it would take a task off their plate to just have those tags already provided.

### View Online Payments without the Edit Payment Right

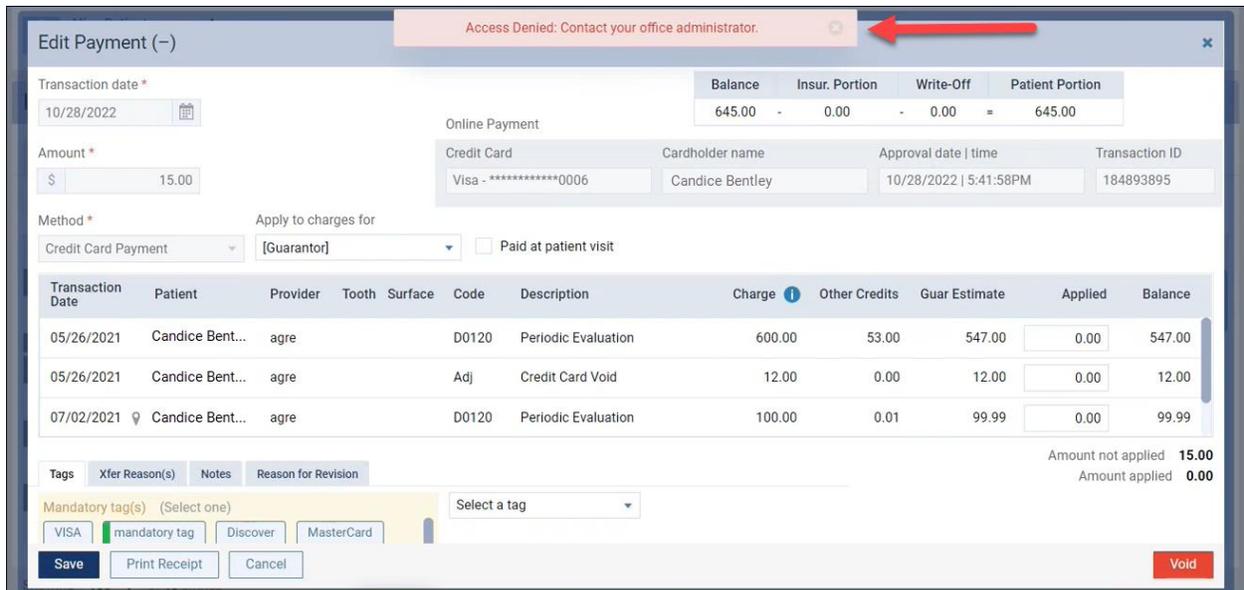
In the Inbox, users with the **Review inbox messages** right see a message each time a patient makes an online payment. In the past, users who did not have the **Edit Payment** right could not open these online payment messages, and therefore could not clear the red dot notification in the Inbox for these

messages. With this release, users who do not have the Edit Payment right will be able to click the payment entry row to open a view-only record of the payment. This will allow them to see more information on the payment. Viewing the window clears the red dot notification.



400\_online\_payments.png

If a user without the **Edit Payment** right attempts to edit the payment and save those changes, they will see an Access Denied error message.



400\_online\_payments\_error.png

## Reporting

In the Day Sheet, you can filter the report data by one provider or several providers that you choose. In this release, the Location Details table at the top of the report has been updated to reflect the selection you make for the Provider filter.

### Day Sheet Report

**Filter**

**Locations**

All

Location\_1

No other locations are selected

Select Locations

Include Summary ⓘ

**Date Range**

10/22/2022-10/28/2022

**Run By**

Transaction date

Modified date

**Include in Estimated Net Prod. ⓘ**

Charge adjustments

Unapplied credit adjustments

**Report Type**

All

**Provider**

All providers

Search Reset

**Day Sheet** Collapse All Print

▼ Location\_1 - Location Details

Transaction Date	Modified Date	Patient Name	Code	Description	Charges	Credits	Provider
10/26/2022	10/26/2022	Egor Ivanov	Pay	Check Payment		-100.00	
10/26/2022	10/26/2022	Egor Ivanov	Adj	Credit Adjustment		-30.00	
10/26/2022	10/26/2022	Egor Ivanov	D0120	Periodic Evaluation	100.00		Prov_1
10/26/2022	10/26/2022	Egor Ivanov	D0140	Limited Evaluation	120.00		Prov_2
<b>Total ⓘ</b>					<b>220.00</b>	<b>-130.00</b>	

▼ Location\_1 - Location Totals

Report Type	Current	Month-To-Date	Year-To-Date	Previous Month
Procedure Charges	220.00	220.00	220.00	0.00
Entered Payments	-300.00	-300.00	-300.00	0.00
Applied Payments ⓘ	-100.00	-100.00	-100.00	0.00
Unapplied Payments	-200.00	-200.00	-200.00	0.00
Entered Credit Adjustments	-30.00	-30.00	-30.00	0.00
Applied Credit Adjustments ⓘ	0.00	0.00	0.00	0.00
Unapplied Credit Adjustments	0.00	0.00	0.00	0.00
Charge Adjustments	0.00	0.00	0.00	0.00
Charges Billed to Insurance	0.00	0.00	0.00	0.00
New Patients	1	1	1	0

400\_day\_sheet\_all\_providers.png

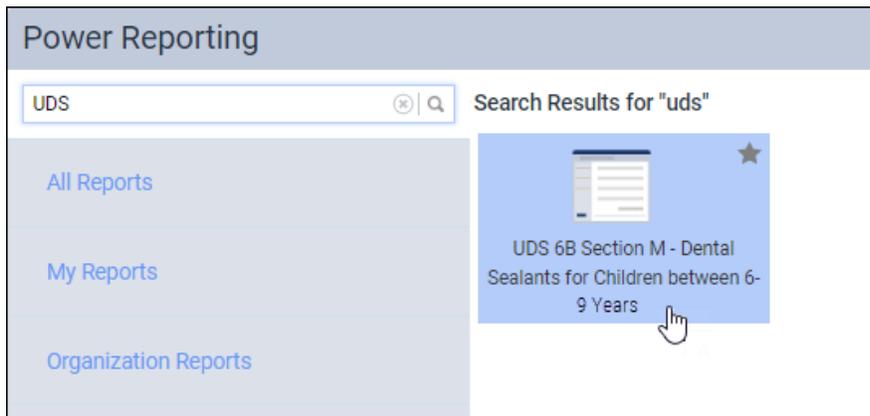
- If you select **All providers** in the Provider filter, the Location Details show transactions for all providers.
- If you select one provider in the Provider filter, only that provider's transactions will be shown in the Location Details table.
- If you select **None** in the provider field, the Locations Details box will show only transactions that are not tied to any provider.
- If you select a provider who has no transactions attached, you will still see the Location Detail table. However, it will be blank and show this message: "There are no transactions that match to your search criteria."

# Power Reporting

## UDS 6B 2022 Fluoride Varnish Health Metric

This update provides a new report for community health organizations. The purpose of this update is to provide the numbers needed for UDS 6B section M Line 22a reports for 2022. This report includes procedure codes for fluoride varnish applications (D1206 and D1208) for the past year.

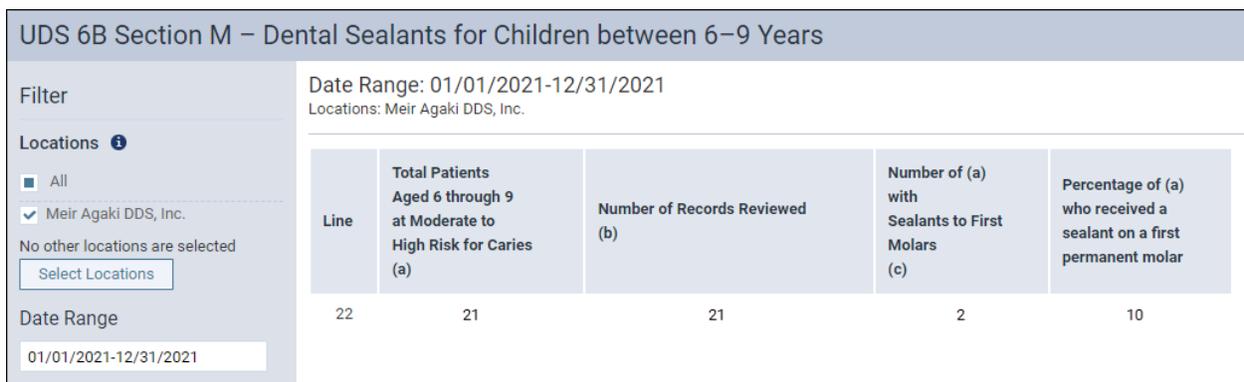
To locate this report, open the Power Reporting page from the Home menu, type “UDS” in the Power Reporting search box, and select the report titled **UDS 6B section M – Dental Sealants for Children between 6-9 Years**.



400\_uds\_6B\_report.png

The report includes:

- the total of patients meeting the criteria
- the sample size of all applicable patients
- the number of patients who received sealants



Line	Total Patients Aged 6 through 9 at Moderate to High Risk for Caries (a)	Number of Records Reviewed (b)	Number of (a) with Sealants to First Molars (c)	Percentage of (a) who received a sealant on a first permanent molar
22	21	21	2	10

[image:400\_UDS\_rpt.png]

Previous users of this report will note a small update to the wording in column (b).

## Imaging

This release includes enhancements to custom templates, intraoral images, and the template/mount.

### Custom Templates Enhancements

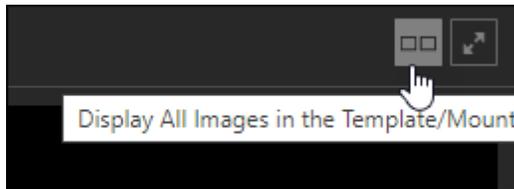
The vertical and horizontal custom template place holders have been reduced by 33% so that you can create a custom template for a full mouth series of 20 images. Prior to this update, there was not enough room to accommodate 20 images for a full mouth series, and the images would overlap.

### Intraoral Images Enhancements

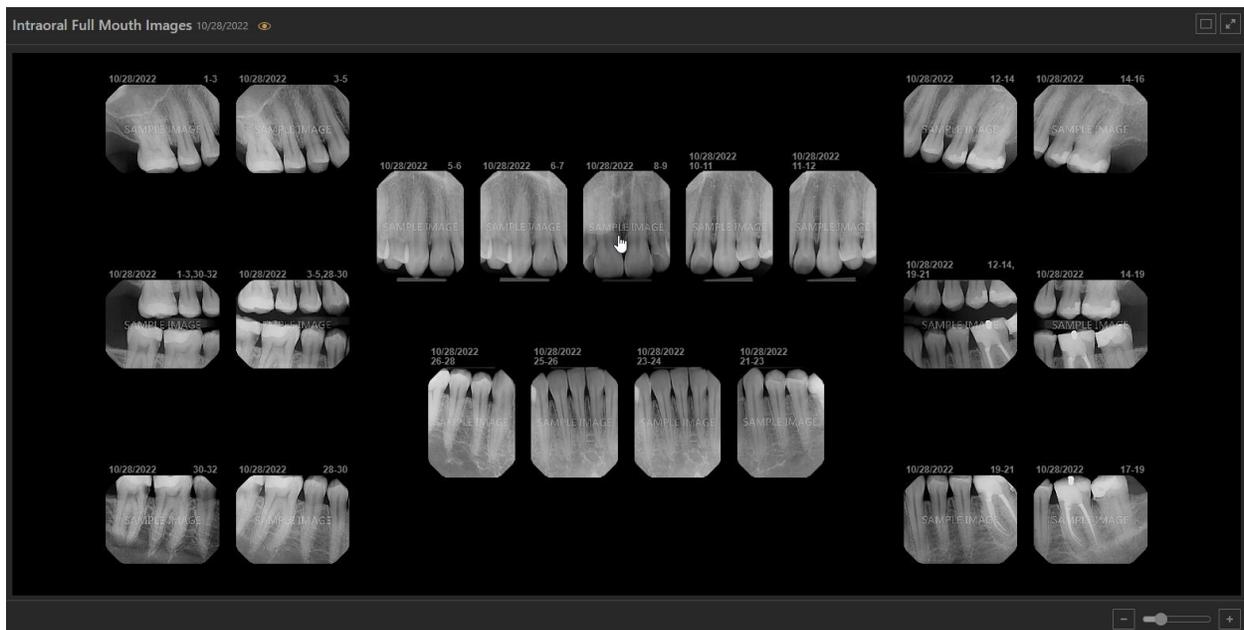
The full screen display has been enhanced for intraoral images so they can be displayed up to 125%. This is especially helpful for smaller, low resolution intraoral images so they can be viewed better on a full screen monitor. Prior to this update many older intraoral images could not be increased and were difficult to view.

### Template/Mount Loading Enhancements

Enhancements have been made to decrease the load time when you want to view all images in the template/mount mode. Now when you click **Display All Images in the Template/Mount**, it takes less time to load the images in the template/mount. For example, a full mouth series of 18 images used to take upwards of 30-40 seconds to load; - now it takes about 10 to 15 seconds to load.



400\_display\_all\_images\_in\_template



400\_display\_all\_images\_in\_template(2)

Also, if you decide to close the **Display all Images in Template/Mount** mode and then return to that mode again, the cache stores the full template of images so they can be re-opened immediately without having to wait.

**Note:** The imaging exam remains in the cache while you have the imaging exam loaded. For example, if you click another imaging exam, and then want to go back to the previous exam you were viewing, it will take about 10 to 15 seconds to load again when you click **Display All Images in the Template/Mount**.

## User Rights

No new user rights were introduced in this update. The requirement to have the **Edit Payment** right in order to open and read online payment messages was removed.

## New Learning Content

The Education Team continuously adds to and updates content in the Dentrix Ascend Resource Center. Below are the latest videos. Click the title to get more information about these topics.

### [Blog: Increasing Your Billing Frequency to Improve Cash Flow](#)

Afraid of offending your patients by sending too many statements? No worries! Dentrix Ascend allows you to send statements to patients who haven't received a bill within a specified period. Find out how in this blog post.

### [On-Demand Webinar: 5 Steps to Getting Patient Portion Estimates You Can Trust \(Sept 2022\)](#)

If you missed the live webinar, you can watch this new on-demand webinar to learn how to set up computer and imaging devices, acquire images, and solve common problems in Dentrix Ascend Imaging. This webinar has something for everyone, regardless of your experience level.

### [Video: Updating Insurance Plan Information](#)

From time to time, you may need to update information for an insurance plan, such as the group ID, benefits, or contact person's information. Ascend makes it easy to update all insurance plan information in one place.

### [Video: Exploring the Insights Dashboard](#)

The Insights dashboard can help you monitor how your practice is doing. This dashboard gathers important metrics for Recare, Billing, Production, Insurance, Schedule Optimization, and Patient data. If you aren't sure where to look for reports in any of these categories, the Insights Dashboard is a great place to start.

### [Blog: Evaluating Your Insurance Carriers](#)

PPO write-offs can have a substantial impact on your bottom line. But before you consider dropping a payer or negotiating with a PPO, you need the numbers on your side. Dentrix Ascend has a report that lists everything you need to know about each insurance carrier so that you can make good decisions for your practice.

### [Webinar: End-of-Year Best Practices \(Oct 2022\)](#)

The end of the year is always a busy time in dental practices. In addition to your everyday tasks, you need to complete tasks for the end of the year and for the upcoming year. Watch this webinar to learn how to find and contact patients with remaining benefits, update fee schedules, and complete other end-of-year tasks in Dentrix Ascend.