

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.

Recare Note	×
Note:	Insert Date
Enter a note	
Save 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
Туре	Due Date	Appointment	Interval	BITEWINGS
BITEWINGS	10/27/2023	Unscheduled	1 Yr	Added after procedure completion on 10/26/2022
FMX	09/20/2025	Unscheduled	3 Yrs	Due Date: 10/27/2023 Appointment: Unscheduled Interval: 1 + - Years Note: Interval: I + - Years Note: Insert Date
				Save Cancel Delete

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.

Overview	ı										
Appoin	ntments		Create	I Ins	urance			Add	• Medical	Alerts	Add
Next Appointr	nent			Туре	Plan	Sub		Eligibility	Created On	Alert Name	
				1	3A0071C916	Robert At	obott	Y 11/19	09/19/2019	Erythromycin / Penicillin /	Other antibiotics
									09/19/2019	Tuberculosis	
									09/19/2019	Autoimmune disease	
Missed Appoin	tments:								09/19/2019	Arthritis / Pain in joints	
0 Broken / 0	No Show										
🖧 Recare	•		Add	\$ Led	iger				Treatme	ent Plan	
Туре	Due Date	Appointment	Note	0 - 30	31 - 60	61 -90	Over 90	Pt. Bal	Case	Status	
BITEWINGS	10/27/2023	Unscheduled	Ð	82.00	247.00	0	0	329.00			
FMX	09/20/2025	Unscheduled	Ð					Guar. Bal			
				Primar	n Guarantor: Pr	ohart Abbott					
_					y oddramor. No				_		
Referra	als			Pat	tient Notes				Patient I	Forms	Request Forms
Referred		First Visit Date		Date 👲					Form	Status	
					No note:	s have been	added vet.				

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.

Recare Managemen	ıt							
Filters	Available R	ecords				Only show act	ive patients On	Print
Locations	Recare Type :	Due Date 🖕	Appointment o	Patient Name :	Contact =	Last Visit 🛛	Last Contacted \circ	Note
District Perio Patients	PROPHY	04/13/2016	Unscheduled	Barr, Ibrahim	Barr, Ibrahim (800) 336-8749	01/12/2016		Ð
With Recare No Recare	PROPHY	04/21/2016	Unscheduled	Welch, Terri	Welch, Terri do_not_reply@ident.c	01/20/2016		Ð
Appointment All	PROPHY	06/25/2016	Unscheduled	Lynn, Kogod	Lynn, Kogod (800) 336-8749			Ð
O Scheduled Unscheduled	PROPHY	09/29/2016	Unscheduled	Dillon, Fred	Dillon, Fred (800) 336-8749	09/22/2016		Ð

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.

	.		R
ľ	The Patient Recare was updated by Michelle McDonald. C here to refresh data in order to proceed.	lick 🙁	
ole Re	Note:	Insert Date	
rpe ⇒	~ Oct 27, 2022 ~ Ibrahim prefers x-rays every 6 months even though insurance will the 2nd set of bitewings.	not cover	49
	Save Cancel		<u>ක</u> ident
		(800) 336-87	49

399_recare_note_refresh

Note: A blue note icon means that the patient <u>has</u> a recare note. A white note icon means that the patient <u>does not have</u> a recare note.

Recare			Add	\$ Led	ger		
Туре	Due Date	Appointment	Note	0 - 30	31 - 60	61 -90	Over 90
BITEWINGS	10/27/2023	Unscheduled	- 8	-Has a	recare n	ote.	
FMX	09/20/2025	Unscheduled	-	- Does n	not have	a recar	e 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

Appointment	Create New	Edit Reminder Active Orr
Appt confirmed	Inactive	Setup steps: Notification Schedule Preferred Sending Method Email Message Text Message Practice Info
Appt scheduled	Inactive	This reminder is set to send 3 days before the appointment is started with the ability for the patient to confirm. Email is the preferred sending method for this reminder.
Sent immediately or 1 hour for househ	blor	When would you like to send the notification?
Appt start Sent 3 days before	Inactive	Appointment reminder is based on * 3 + - days After Before Appointment Start Date and Time Appointment Scheduled Date Exclude automate days Include Premedicate m Appointment Confirmed Date Ins link
Appt start Sent 1 day before and send forms to patients	Inactive	Off Appointment Start Date and Time I Appointment Completed Date Appointment Completed Date I Appointment Broken Date Appointment No Show Date I
Appt completed Sent 1 hour after	Inactive	Off 1 + - hours v I + - notices

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

Medical History					×
Campbell - Acting as Mis	ha				
C				1	θ
				Edit	Profile
10/04/2022					î.
TOTOTILOLL					
		Medical	History		
		medical	Thotory		II
VES	Alleroy - Aspirin	VES	Abnormal (High/Low) Blood Pressure		
YES	Alleray - Codeine	YES	AIDS/HIV		
YES	Allergy - Latex	YES	Anemia / Bleeding Problems		
YES	Allergy - Local Anesthetic	NO	Artificial Heart Valves		
NO	Allergy - Penicillin	YES	Blood Disease		
YES	Allergy - Sulfa	YES	Congenital Heart Lesions		
List any other allergies:		YES	Heart Problems		
		YES	Pacemaker		
YES	Arthritis / Rheumatism / Gout		YES Epilepsy		
YES	Artificial Joints / Bones		YES Fainting / Dizziness		
YES	Asthma		YES Headaches (Frequent)		_
YES	Cancer		YES Henatitis		

399_new_window_size.png

Old Window Size

🕈 Home 👻 🧮 S	Schedule 👻 💄 Patient 👻	🛃 🛛 Anna Mishany 🗢		¢ ^o Settings →	Q 234-Nelson P Administrator		€ → Ø Test →
Overview	Medical History					×	
0 Broken / 0 No Sho	Nelson Page - Acting as Anna	1				~	
△ Recare					Edit Pr	rofile	
Type Du	10/05/2022					Î	
exam 07			Medical History				TED
paul 08	YES Alle	rov - Aspirin				1	
NEWWW 08 PANOREX 10	YES Alle	ergy - Codeine					
Hello All 10	YES Alle	ergy - Local Anesthetic					
Referrals	YES Alle	ergy - Sulfa					Request Forms
Referred	List any other allergies.					-	<u>v</u>
	YES Abr	normal (High/Low) Blood S/HIV	Pressure				ton 10/05/2022
	YES And YES Arti	emia / Bleeding Problem ficial Heart Valves	s				d on 10/05/2022
	YES BIO	od Disease					d on 10/05/2022
6	YES Hea	art Problems				-	

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.

A Home → A Schedule →	💄 Patient 👻 🖶	Stephen Shapiro 🛥	ş	¢¢ [°] S	ettings 👻 🤇	District Perio Role for user tech7	∀ 0 ₹	2 Dtx Ascend7 👻
Enter Payment (-)								×
Transaction date * 10/28/2022	Transaction ID			Balance In 373.00 -	nsur. Portion 307.60	Write-Off - 0.00 =	Patient Portion 65.40	
Amount * \$ 0.00				Insurance Adjust	tment Adjustm	ent Type	Amount	0.00
Method *	Claim * 11/10/2021 BCF178 S	tephen 👻 Add	ditional payment(s) expected la	ter from insurance	,			
Transaction Patient Date	Provider Tooth S	urface Code	Description	Charge 🚺	Other Credits	Guar Estimate	Applied	Balance
11/10/2021 Stephen Shapir	o Kate	0002	Prevident	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 i Amoi	not applied 0.00 unt applied 0.00
Save Cancel								

Image: 400_default_tags.png

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

	💣 Setting	S ▼ Oistrict Perio ▼ Role for user tech7	😧 👻 🔁 Dtx Ascend7 👻
ovi	LOCATION	PRODUCTION	PATIENT CARE
	Location Hours	Coverage Tables	Clinical Note Templates
	Location Information	Fee Schedules	Medical Alerts Library
	Patient Forms	Insurance Defaults	Patient Communications
D	Operatories	Procedure Codes & Conditions	Prescriptions
	User Accounts	Ledger Options	Recare
-C	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				
 Insurance Paymer 	nt - Check		Charge Adjustme				
 Insurance Payme 	nt - Electronic	1	 Collected Bad Del 				
 Insurance Payme 	nt - Credit Card		 Electronic Check 				
 Check Payment 			✓ Initial Balance For				

Image: 400_ledger_options_edit.png

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

Edit Insurance Payment - Credit Car	d Method	×
Active		
Yes		
Tagging Rules		
Tag restriction rules On-demand tag creation	n 🕕	
On Off		L
Tag Restriction Rules		_
Information. If no tags are specified below, tag payment method.	ging capabilities will be disabled for this	
Mandatory tag(s)	Optional allowed tag(s)	
Add a tag Q	Add a tag Q	
VISA × Discover ×		1
American Express X MasterCard X		
Save		

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.

Inbox	1								
Messages Online Pa	ayments 9 Denti-	Cal Reports							
Search guar./card holder/	ref # Q Vi	ew 💌							
Date & Time 🖕	Guarantor 👙	Card # 👳	Card Holder 👙	Card Type 👳	Transaction ID 👳	Reference # 👙	Status 👳	Amount 👳	Att.
10/28/2022 — Today									1
10/28/2022 5:41 PM	Candice Bent	****0006	Candice Bent	Visa	184893895	Candice Bentl	Unapplied	15.00	0
09/23/2022									
09/23/2022 12:59 PM	Candice Bent	****0006	Candice Bent	Visa	175172795	Candice Bentl	Voided	1.00	0
09/21/2022									1
09/21/2022 6:13 PM	John Miner	****0006	John Miner	Visa	174783491	John Miner 55	Unapplied	25.00	0

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.

Edit Payment (-)	Access Denied: Contact your of	fice administrator.
Transaction date * 10/28/2022	Online Payment	BalanceInsur. PortionWrite-OffPatient Portion645.00-0.00-0.00=645.00
Amount *	Credit Card	Cardholder name Approval date time Transaction ID
\$ 15.00	Visa - *********0006	Candice Bentley 10/28/2022 5:41:58PM 184893895
Method * Apply to charges for		
Credit Card Payment v [Guarantor]	 Paid at patient visit 	
Transaction Patient Provider Tooth S Date	urface Code Description	Charge 1 Other Credits Guar Estimate Applied Balance
05/26/2021 Candice Bent agre	D0120 Periodic Evaluation	600.00 53.00 547.00 0.00 547.00
05/26/2021 Candice Bent agre	Adj Credit Card Void	12.00 0.00 12.00 0.00 12.00
07/02/2021 V Candice Bent agre	D0120 Periodic Evaluation	100.00 0.01 99.99 0.00 99.99
Tags Xfer Reason(s) Notes Reason for Revision Mandatory tag(s) (Select one) VISA Mandatory tag Discover MasterCard	Select a tag 🔹	Amount not applied 15.00 Amount applied 0.00
Save Print Receipt Cancel		Void

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	Day Sheet						Collapse All Print
Locations	✓ Location_1 - Location Details						
All	Transaction 🖕 Date	Modified _© Date	Patient Name 🕆	Code	Description	Charges	Credits Provider
 Location_1 No other locations are selected 	10/26/2022	10/26/2022	Egor Ivanov	Pay	Check Payment		-100.00
Select Locations	10/26/2022	10/26/2022	Egor Ivanov	Adj	Credit Adjustment		-30.00
Include Summary	10/26/2022	10/26/2022	Egor Ivanov	D0120	Periodic Evaluation	100.00	Prov_1
Date Ranne	10/26/2022	10/26/2022	Egor Ivanov	D0140	Limited Evaluation	120.00	Prov_2
10/22/2022.10/28/2022 🛞	Total 🚺					220.00	-130.00
10/20/2022 10/20/2022	 Location_1 	- Location To	otals				
Run By	Report Type			Current	Month-To-Date	Year-To-Date	Previous Month
Modified date	Procedure Charg	jes		220.00	220.00	220.00	0.00
Include in Estimated Net Prod.	Entered Paymen	ts		-300.00	-300.00	-300.00	0.00
Charge adjustments	Applied Paymen	ts 🕕		-100.00	-100.00	-100.00	0.00
Unapplied credit adjustments	Unapplied Paym	ents		-200.00	-200.00	-200.00	0.00
Report Type	Entered Credit A	djustments		-30.00	-30.00	-30.00	0.00
All	Applied Credit A	djustments 🕚)	0.00	0.00	0.00	0.00
Provider	Unapplied Credit	Adjustments		0.00	0.00	0.00	0.00
Allerevidee	Charge Adjustm	ents		0.00	0.00	0.00	0.00
	Charges Billed to	Insurance		0.00	0.00	0.00	0.00
Search Reset	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.
- <u>If you select one provider in the Provider filter</u>, only that provider's transactions will be shown in the Location Details table.
- <u>If you select **None** in the provider field</u>, the Locations Details box will show only transactions that are not tied to any provider.
- <u>If you select a provider who has no transactions attached</u>, 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**.

Power Reporting		
UDS	⊛ Q	Search Results for "uds"
All Reports		*
My Reports		UDS 6B Section M - Dental Sealants for Children between 6- 9 Years الحم
Organization Reports		

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

UDS 6B Section M – Dental Sealants for Children between 6–9 Years										
Filter	Date Ra	Date Range: 01/01/2021-12/31/2021 Locations: Meir Agaki DDS, Inc.								
Locations 1										
 All Meir Agaki DDS, Inc. No other locations are selected Select Locations 	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					
Date Range 01/01/2021-12/31/2021	22	21	21	2	10					



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.