

DENTRIX ASCEND

Release Notes: March 7, 2023 (Beta 406)

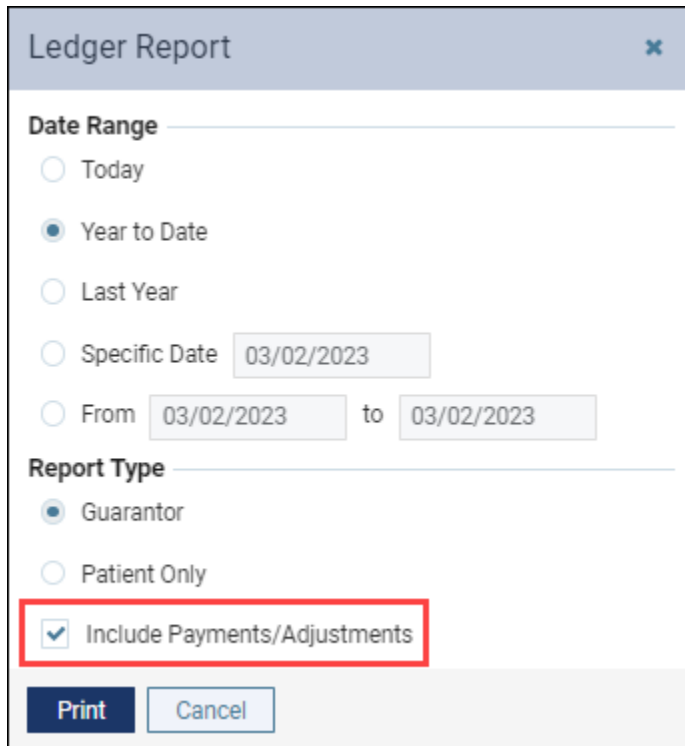
This update introduces a refinement to the Ledger Report released earlier and adds a minor adjustment to the Ledger for carrier payments by credit card.

Ledger

Ledger Report Enhancement

This release introduces a new **Include Payments/Adjustments** checkbox to the Ledger Report.

In the [last release](#), the Ledger Report included all completed procedures, payments, adjustments, and claims. In this release, the new **Include Payments/Adjustments** checkbox gives you the option to include or exclude that information from the patient's Ledger Report.



The screenshot shows a window titled "Ledger Report" with a close button (x) in the top right corner. The window is divided into two main sections: "Date Range" and "Report Type".

Date Range

- Today
- Year to Date
- Last Year
- Specific Date
- From to

Report Type

- Guarantor
- Patient Only
- Include Payments/Adjustments

At the bottom of the window, there are two buttons: "Print" and "Cancel".

406_ledger_report_enhancement.png

Note: By default, Include Payments/Adjustments is checked.

When **Include Payments/Adjustments** is selected, the following items appear on the Ledger Report:

- Completed procedures
- Payments
- Adjustments

- Claims
- Balance Forward
- Balance as of [date]

When **Include Payments/Adjustments** is **not selected**, only the completed procedures appear on the Ledger Report.

Edit Claim Payment Modification

Because our third-party provider, WorldPay, does not return a cardholder name when you process an insurance carrier credit card payment, the Edit Claim Payment window will no longer include the **Cardholder Name** field for this transaction type.

Edit Claim Payment ✕

Payment date *	Transaction ID	Insurance Adjustment	Adjustment Type	Amount
11/11/2022	1RY82308	None	None	\$ 1200.00
Amount *	Cardholder Name			
\$ 1200.00				
Payment method *	Claim *			
Insurance Payment - Credit...	11/11/2022 MetLife - Strick...	<input checked="" type="checkbox"/> Additional payment(s) expected later from insurance		

Transaction Date	Tooth	Surface	Code	Description	Provider	Charge	Other Credits	Allowed	Adjustment	Ins. Estimate	Applied	Balance
11/08/2022			D0120	Periodic Evaluation	MetLife - S...	544.50	0.00	150.00	150.00	150.00	12.00	544.50
11/08/2022			D0120	Periodic Evaluation	MetLife-W...	154.00	0.00	150.00	150.00	150.00	12.00	154.00
11/08/2022			D0120	Periodic Evaluation	MetLife Pr...	278.00	0.00	150.00	150.00	150.00	12.00	278.00

[406_cardholder_name_removed.png]

User Rights

No new user rights were added for this update.

New Learning Content

As the Dentrax Ascend software continues to change and improve, our resources also expand and update when needed.

Blog Tip

[Customizing Overdue Claim Timeframes](#)

You can customize the expected period of insurance claim resolution and get a more exact picture of how many of your claims are overdue.