



## Release Notes: March 23, 2023 (Prod 407)

This release introduces an update to the Calendar's handling of provider groups. Changes to the handling of patient email addresses reemphasize the relationship of the patient to the primary contact, and there is an enhancement to the sending of appointment reminders to the primary contact. Multiple enhancements have been made to the Imaging module.

### Scheduling

A user group is a selection of providers (dentists, hygienists, and so forth) that you can use to quickly customize the Calendar view, as explained in a [recent release](#). You can edit user (provider) groups as needed.

In this release, the User Groups name has been changed to **Provider Groups**.

This name change has been updated on the Calendar View menu, on the Settings menu, on the pages for setting up the groups, and for user rights on the User Roles page.

**On the Calendar View menu:** The name has been changed from User Groups to Provider Groups.

#### *Before Update*

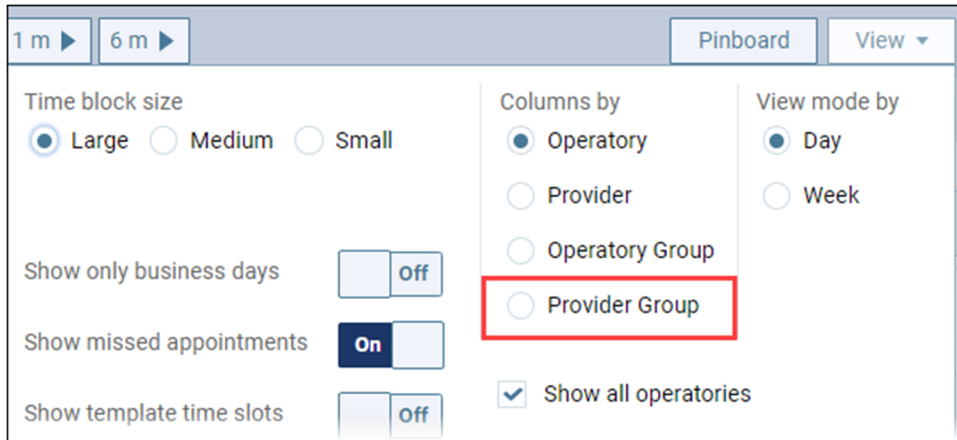
The screenshot shows the 'Calendar View' settings menu. At the top, there are navigation buttons for '1 m' and '6 m', and a 'Pinboard' button. The 'View' dropdown menu is open, showing three options: 'Day' (selected), 'Week', and 'User Group' (highlighted with a red box). Below the 'View' menu, there are three columns of settings:

- Time block size:** Radio buttons for 'Large' (selected), 'Medium', and 'Small'.
- Columns by:** Radio buttons for 'Operator' (selected), 'Provider', 'Operator Group', and 'User Group' (highlighted with a red box).
- View mode by:** Radio buttons for 'Day' (selected) and 'Week'.

At the bottom, there are three toggle switches:

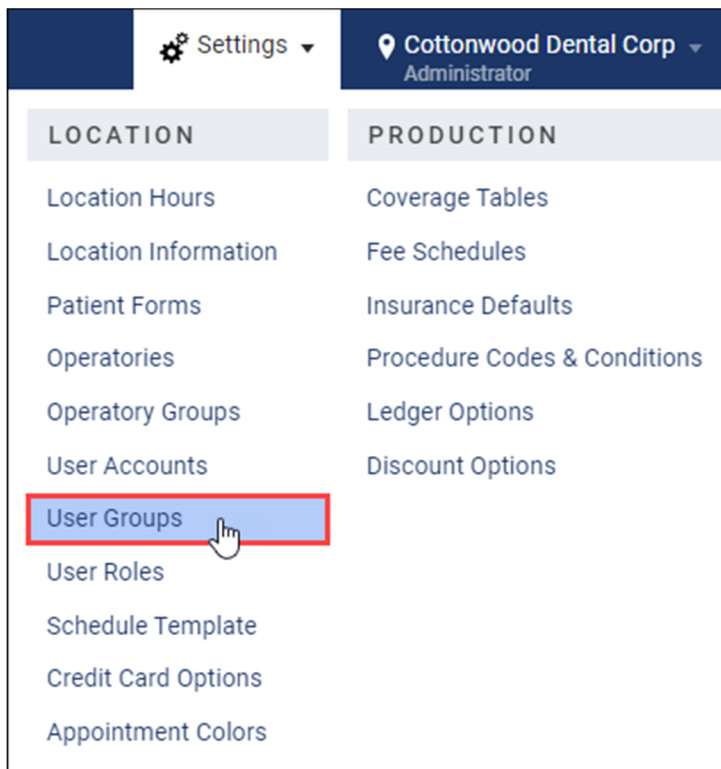
- 'Show only business days' (Off)
- 'Show missed appointments' (On)
- 'Show template time slots' (Off)

There is also a checked checkbox for 'Show all operatories'.



**On the Settings menu:** The menu name has been changed from User Groups to Provider Groups.

*Before Update*



*After Update*

Settings Cottonwood Dental Corp Administrator

| LOCATION               | PRODUCTION                   |
|------------------------|------------------------------|
| Location Hours         | Coverage Tables              |
| Location Information   | Fee Schedules                |
| Patient Forms          | Insurance Defaults           |
| Operatories            | Procedure Codes & Conditions |
| Operator Groups        | Ledger Options               |
| User Accounts          | Discount Options             |
| <b>Provider Groups</b> | ERA Options                  |
| User Roles             |                              |
| Schedule Template      |                              |
| Credit Card Options    |                              |
| Appointment Colors     |                              |

**On the User Groups page:** The title and page text have been changed from User Groups to Provider Groups.

*Before Update*

**User Groups**

Available Groups [Create New](#)

- Org 1
- Org 2

Please select a user group from the list on the left or create a new one by clicking the button "Create New".

*After Update*

**Provider Groups**

Available Groups [Create New](#)

- Org 1
- Org 2

Please select a provider group from the list on the left or create a new one by clicking the button "Create New".

**On the Assigned Users details section:** The labels have been changed in the details section from User(s) to Provider(s).

*Before Update*

Org 1 - Assigned Users

Group Name \*

User Specialty

Add User

Search for User

| User           | Username | Specialty | Status |   |
|----------------|----------|-----------|--------|---|
| Adam Jones     | AJones   | Hygienist | Active | ✕ |
| Adam McDerm... | DDS1     | Dentist   | Active | ✕ |

*After Update*

Org 1 - Assigned Providers

Group Name \*

Provider Specialty

Add Provider

Search for Provider

| User           | Username | Specialty | Status |   |
|----------------|----------|-----------|--------|---|
| Adam Jones     | AJones   | Hygienist | Active | ✕ |
| Adam McDerm... | DDS1     | Dentist   | Active | ✕ |

**On the User Roles page:**

Under the Settings category, the names of these rights have been updated:

- Review User Group has been changed to **Review Provider Group**.
- Delete User group has been changed to **Delete Provider Group**.
- Create/Update User Group has been changed to **Create/Update Provider Group**.

## Patient Information

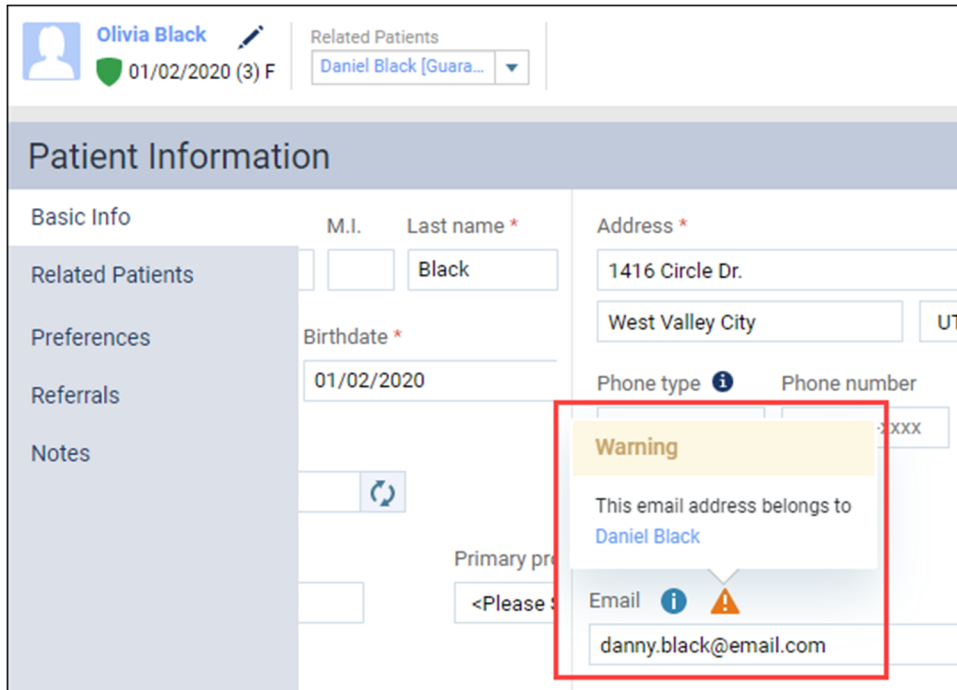
This update introduces several enhancements to the handling of patient email addresses, as configured in the Basic Info tab of the Patient Information menu.

### Duplicate Email Address Alert

Dentrix Ascend does all automated patient messaging by looking at the patient's primary contact. In family or group situations many patients can share the same primary contact. For reference purposes,

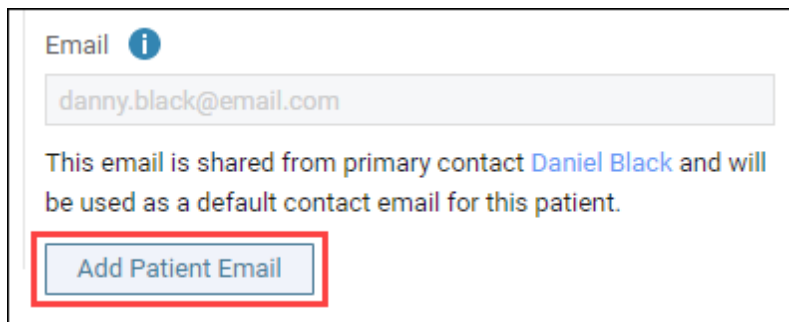
Dentrix Ascend does allow you to enter duplicate email addresses; however, this is unnecessary data entry.

We want to help you avoid duplication of effort. With this update, an alert appears when you save a duplicate email address on a patient’s Basic Info page. Click the alert icon to see whose email you have duplicated. The warning message contains a link to that person. The alert appears only when you first save the duplicate.



### Patient Reference Email

This update brings a new **Add Patient Email** button to the Patient Information > Basic Info page. The button appears only when the patient is NOT their own primary contact (i.e., “Self” is not selected as the patient’s primary contact).



Click **Add Patient Email** to add an alternate email address to the patient’s record. **IMPORTANT:** This email address is for your reference only and Dentrix Ascend will NOT use it to reach out to the patient through the automated Patient Communications system. You could, however, copy the address and paste it into an email sent from your practice’s email service provider for incidental communications.

Email ⓘ

danny.black@email.com

This email is shared from primary contact [Daniel Black](#) and will be used as a default contact email for this patient.

Email (Patient)

kristen.black@email.com ✕

This email can be used for reference purposes.

### Missing Email Alert

If you have selected the primary contact's preferred contact method as **Email me** (in the Preferences tab), but you later remove that primary contact's email address in the Basic Info tab, you will see an **Error** alert when you attempt to save the change. You can save your changes, but the alert will remain until the issue is corrected.

**Error**

'Email me' has been selected as the Preferred Contact Method for this patient. An email address must be entered or the Preferences changed.

Email ⓘ ⚠

Ext

You will also see a message, without an alert, under the **Email** field in the patient records of the patients attached to the primary contact, reminding you to add an email.

Email ⓘ

No email provided

Please add an email to primary contact [Daniel Black](#).

Add Patient Email

## Scheduling

### Appointment Reminders Send Time Update

A recent release modified the handling of automated appointment reminders. Now, any reminders that would have gone out between 9:01 p.m. and 7:59 a.m. local time will not be sent to patients. This is to be compliant with the Telephone Consumer Protection Act (TCPA).

As an improvement to this behavior, rather than simply not sending the appointment reminder, any reminder whose notification logic would lead to it being sent out between 9:01 p.m. and 7:59 a.m. will now be sent at 9:00 p.m. that day (or what will become the day before).

### Edit Reminder

Setup steps: Notification Schedule Preferred Sending Method Email Message Text Message

This reminder is set to send 2 hours before the appointment is started with the ability for the patient to confirm method for this reminder.

When would you like to send the notification?

Appointment reminder is based on \*

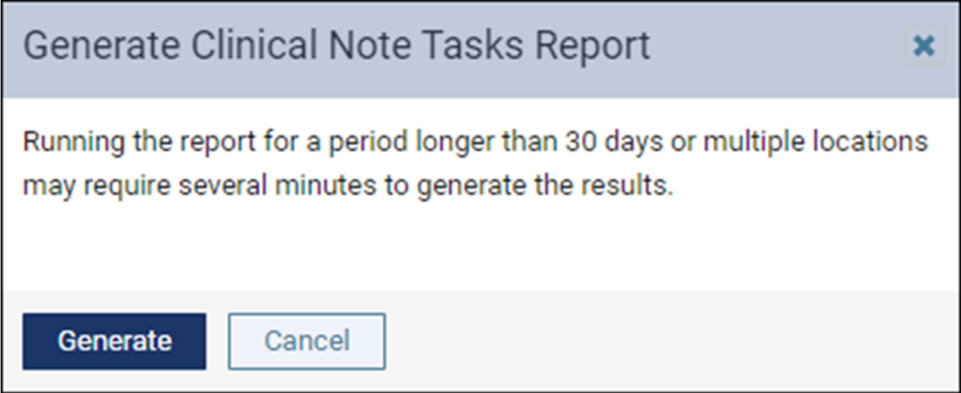
2 + - hours  After  Before Appointment Start Date and Time

Exclude automated message  Off Include Premedicate message on Email  Off Ability to confirm  On

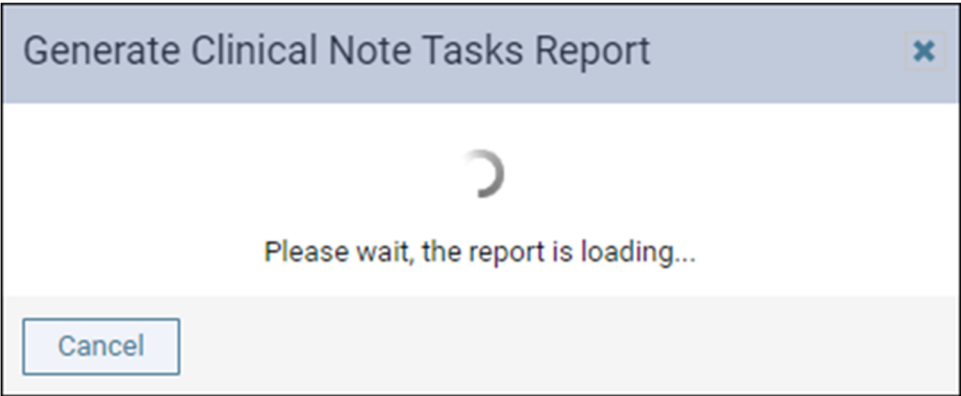
Continue sending  Off Repeat every 1 + - days until confirmed Discontinue after 1 + - notices

## Clinical

This release introduces a new Generate Clinical Tasks Report notification. When you select dates spanning more than 30 days, or select multiple locations, the new notification alerts you that the report may take more time to generate. You can then either click **Generate** to generate the report or click **Cancel** to generate the report later when you have more time.



When you click **Generate**, a “Please wait, the report is loading...” message appears while the report generates.



### Audit Log

The Audit Log allows managers to track changes so they can easily identify who, when, and what kind of changes were made. This release includes several new tracking items. The Audit Log now reports creation, update, and delete events for the following activities:

- Ortho and prosthesis information in a patient’s existing or treatment-planned procedures.
- **Require treatment info** field setting for orthodontic and prosthetic procedure codes.

| Audit Log               |           |               |             |                           |               |  | Print |
|-------------------------|-----------|---------------|-------------|---------------------------|---------------|--|-------|
| Date/Time               | User      | Location      | Type        | Patient                   | Action        | Details  |       |
| 03/15/2023 - 03/21/2023 | All Users | VIP-Dental123 | Select type | Patient search            | Select action | Search here  |       |
| 03/21/2023 07:49:27 PM  | drogers   | VIP-Dental123 | Ledger      | Kristen Black, 04/13/1991 | Update        | <div style="border: 1px solid red; padding: 5px;">           TYPE: Procedure<br/>           OLD: 03/21/2023   D8010   Limited Ortho for Primary   Alex   120.00   Orthodontic treatment: Placement 03/21/2023, Months remaining 0   Completed<br/>           NEW: 03/21/2023   D8010   Limited Ortho for Primary   Alex   120.00   Orthodontic treatment: Placement 03/21/2023, Months remaining 10   Completed         </div> |       |

*Zoomed in view of Audit Log Details*



| Patient  | Action   | Details  |
|--|--|--|
| <input type="text" value="Patient search"/> <input type="button" value="Q"/> | <input type="button" value="Select act"/> <input type="button" value="v"/> | <input type="text" value="Search here"/> <input type="button" value="Q"/>  |
| Kristen Black,<br>04/13/1991   | Update   | TYPE: Procedure<br>OLD: 03/21/2023   D8010  <br>Limited Ortho for Primary   Alex  <br>120.00   Orthodontic treatment:<br>Placement 03/21/2023, Months<br>remaining 0   Completed<br>NEW: 03/21/2023   D8010  <br>Limited Ortho for Primary   Alex  <br>120.00   Orthodontic treatment:<br>Placement 03/21/2023, Months<br>remaining 10   Completed |

**Note:** A user's role controls whether they have access to the Audit Log.

For a better understanding of user roles, watch [Roles and Rights Overview](#) in the Resource Center. For a complete listing of user rights and their application, see [Security rights list](#) in the Resource Center.

## Imaging

This release introduces enhancements to Detect AI (Artificial Intelligence) and other imaging features.

### Dentrix Ascend Detect AI Enhancements

This release introduces enhancements to Dentrix Ascend Detect AI that include the ability to rotate the AI results when the image is rotated,

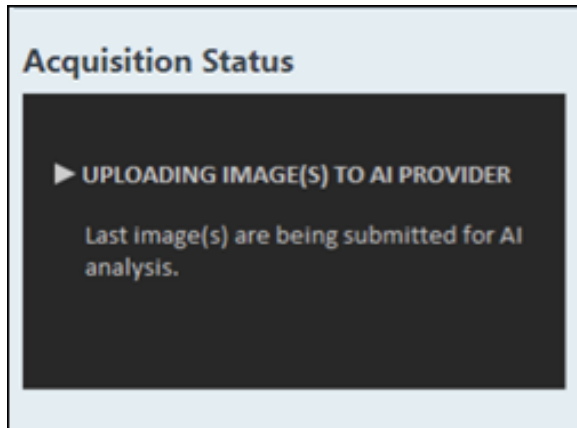
#### Rotated Images

With this update, when you rotate an image, the caries detect AI results will automatically appear on the rotated image.

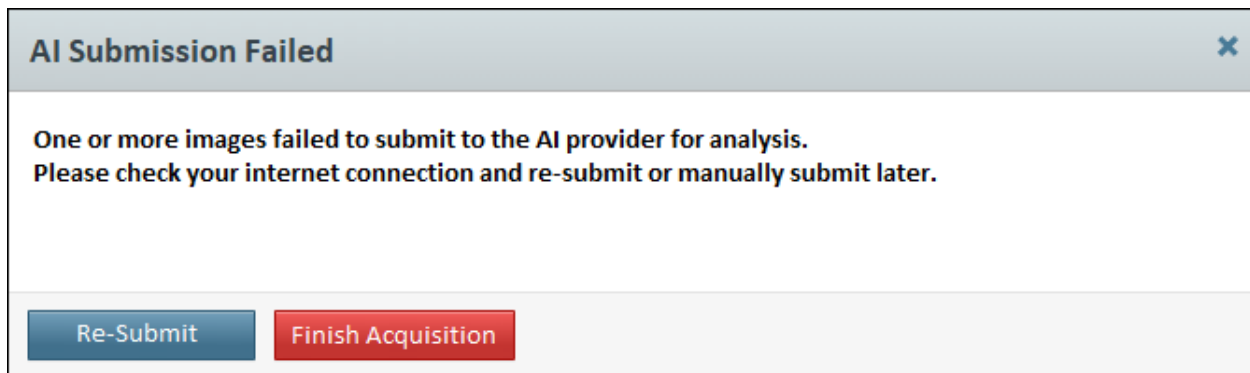
**Note:** If you choose to rotate an image, be aware that the image will get resubmitted to Videa Heath and there may be a 3 to 5 second delay for the caries detection boxes to reappear.

#### Acquisition Status Notification

With this release, the Acquisition Status shows that the images are being uploaded to the AI provider. While the images are being submitted, no buttons are available at the bottom of the viewer, such as Finish Acquisition and Recapture.



If an error occurs during AI submission, an AI Submission Failed message appears. You have the option to click **Re-Submit**, **Finish Acquisition**, or **X** to close the message.



If you click **Re-Submit**, the message closes, the image(s) are resubmitted for AI analysis, and the Acquisition Status box displays the Uploading Image(s) to AI Provider message.

- If you click **Finish Acquisition**, the imaging acquisition mode closes. From the image viewer, you can select the image and click **Submit for analysis** to get the AI caries detect results for that image.
- If you click **X**, the message closes, and the imaging acquisition will proceed to the next image. When you finished acquiring images, you can select the image where the AI submission failed and click **Submit for analysis** to get the AI caries detect results for that image.

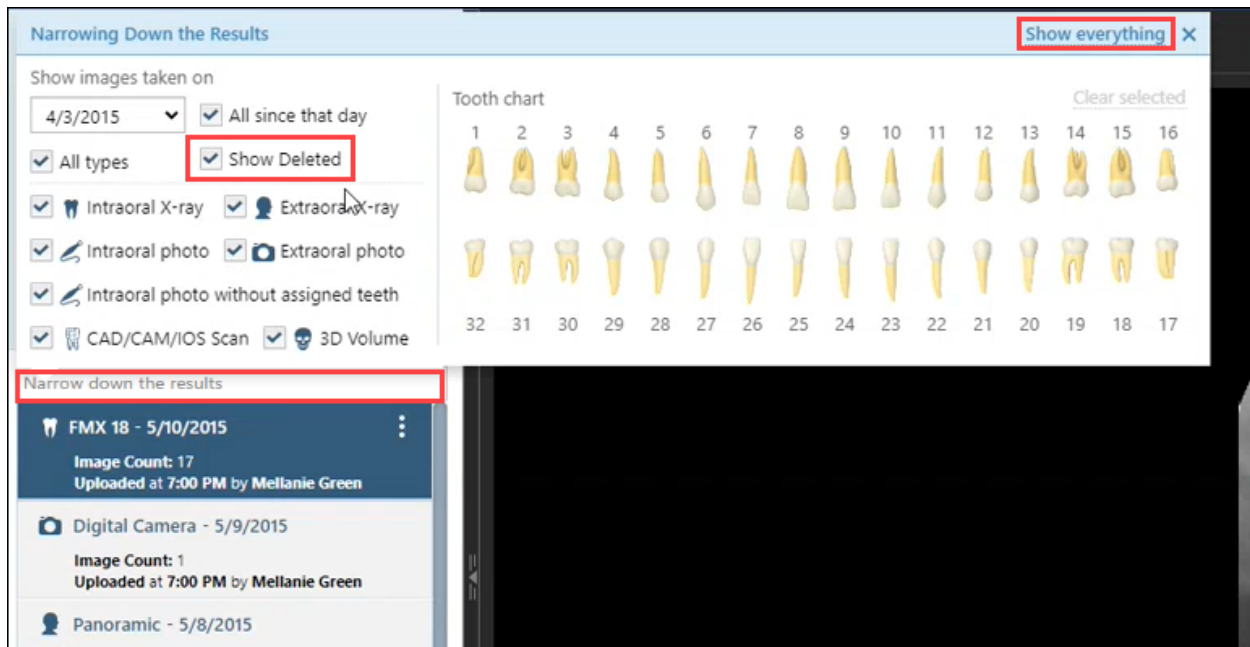
## Other Imaging Enhancements

### Restoring a Deleted Imaging Exam or Deleted Images

With this release, you can restore previously deleted imaging exams and images.

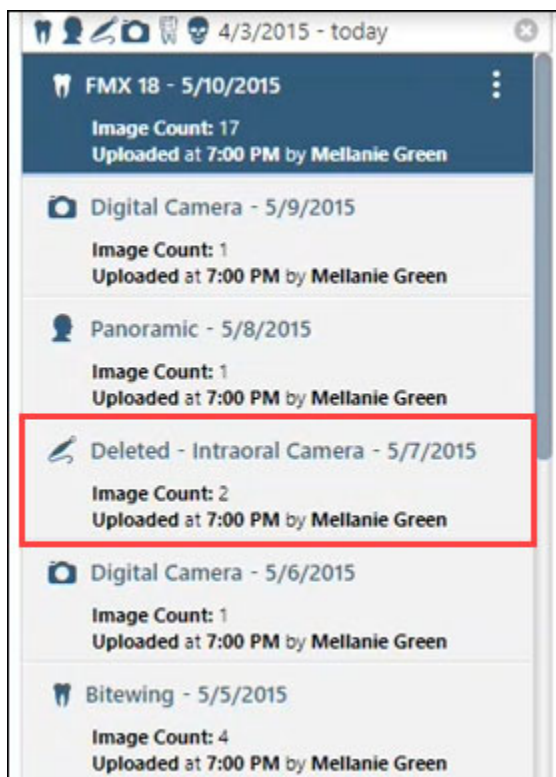
**Note:** By default, the **Show Deleted** option is not available.

To view a deleted image or imaging exam, click in the **Narrow down the results** field to open the Narrowing Down Results dialog box. Then, click **Show Everything** to enable the **Show Deleted** option.

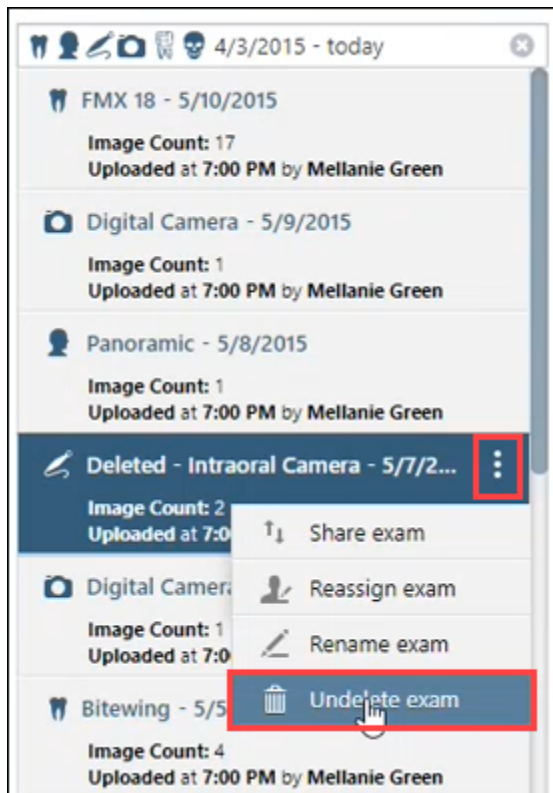


### Restoring a Deleted Imaging Exam

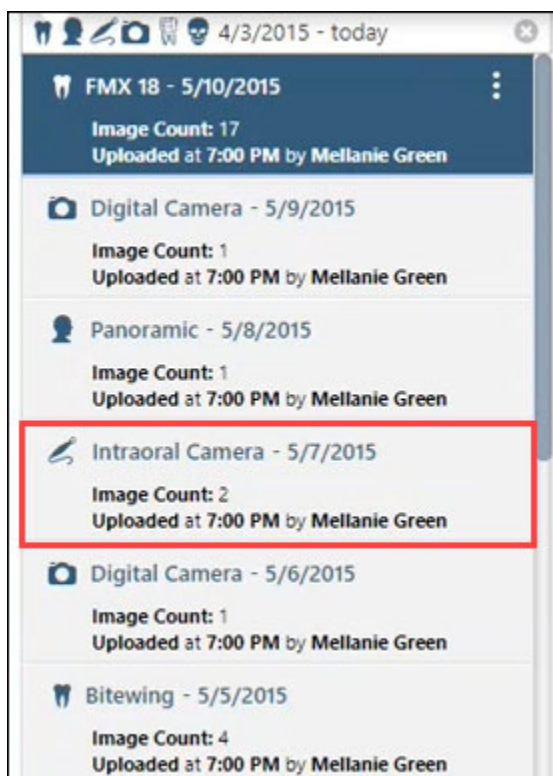
“Deleted –” appears before the name of any deleted exams so they are easily distinguishable from the non-deleted exams.



To restore an imaging exam, select the deleted imaging exam, click the 3 dots, and select **Undelete exam** to restore the deleted image.

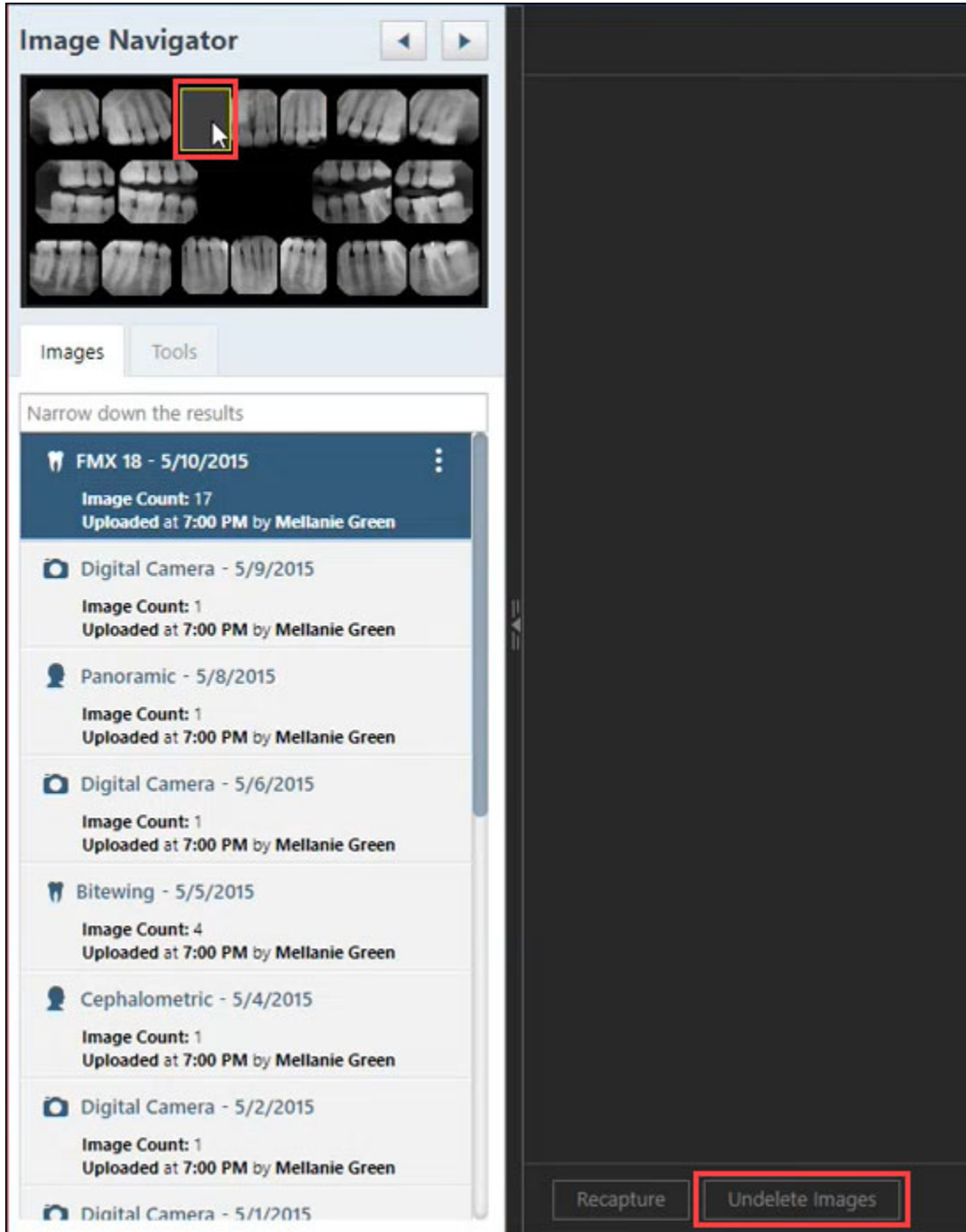


After the exam is undeleted, the “Deleted –” text is removed from the exam name. Also, if you click the 3 dots with this exam selected, the **Delete exam** option appears instead of the **Undelete exam** option.

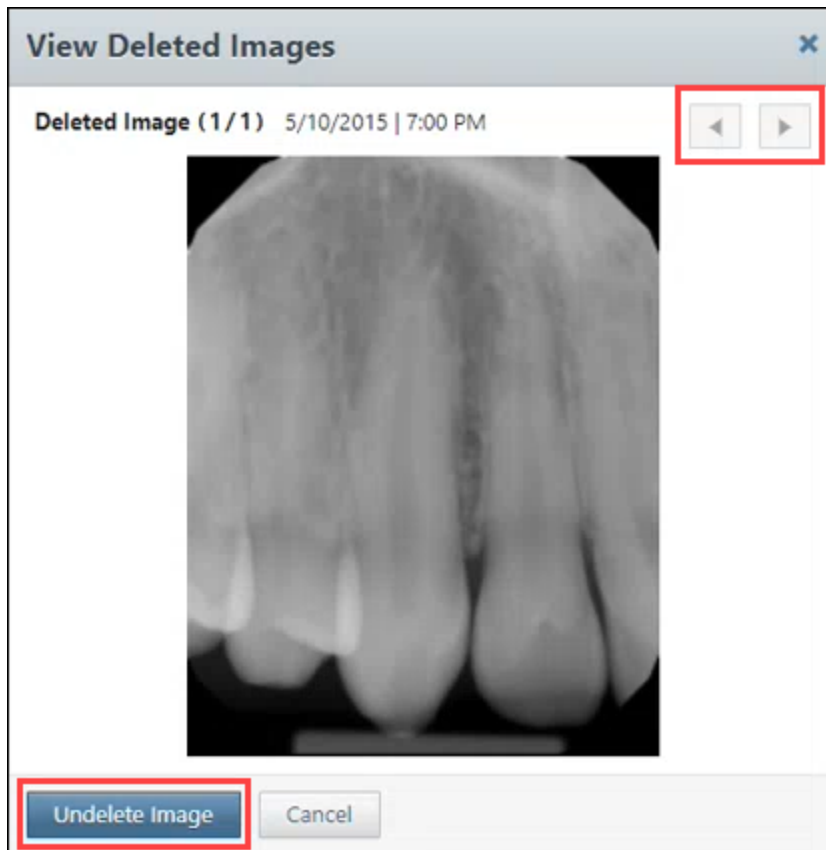


## Restoring an Image Within an Existing Imaging Exam

When an imaging exam has a deleted image, you can now select empty exam slots in the imaging exam template. If deleted images exist for the selected slot, an **Undelete Images** button appears in the image viewer. Otherwise, the button is not shown.



When you click **Undelete Images**, the **View Deleted Images** dialog box opens. Here you can click the arrows to scroll through each deleted image and click the **Undelete Image** to restore that image to the imaging exam.



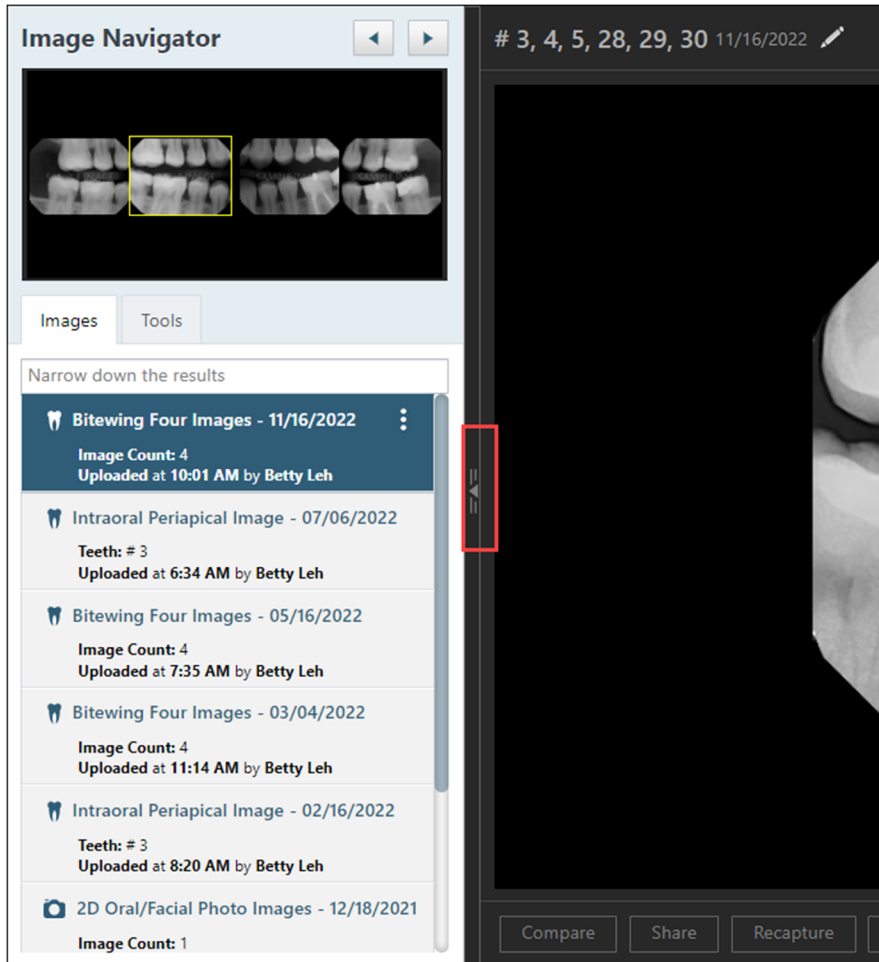
#### Allow Restart on Acquisition Device Error

If acquisition stops because of a device error, a new **Start** button allows you to restart the acquisition.

#### Show/Hide Exam List – Imaging Exam Flyout

The new **Show/Hide Exam List – Imaging Exam Flyout** allows you to hide the imaging exam list so you can view each image from all imaging exams and not have to click each imaging exam on the imaging exam list.

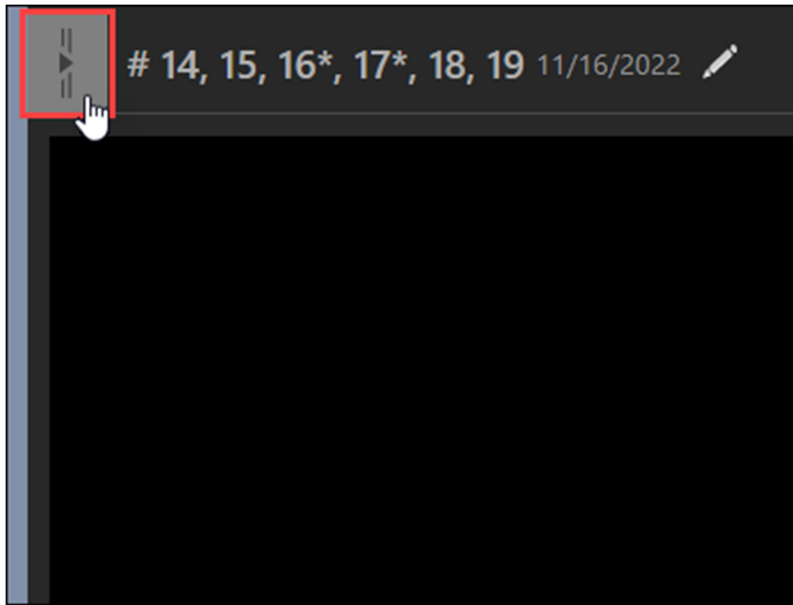
To use the Imaging Exam Flyout, click the **Hide Exam List arrow** to hide the imaging exam listing.



Then, click the **left arrow** to view the previous image of the imaging exam or click the **right arrow** to view the next image of the imaging exam.

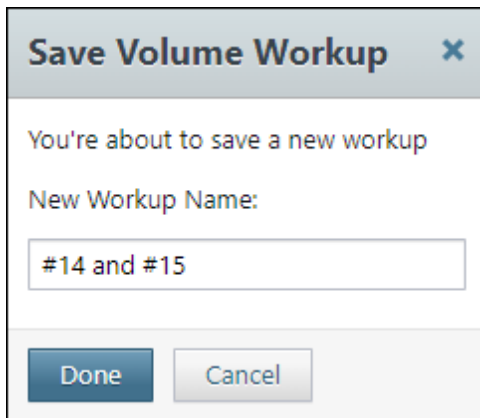


When you want to show the exam list, click the **Show Exam List arrow**.



### 3D Volume Workups

With this release, you can press **Enter** on your computer keyboard instead of clicking **Done** to save a New Workup Name for a 3D CBCT (Cone Beam Computed Tomography) image.



### User Rights

No new user rights were introduced in this update, but several user right names were modified, as noted above.