

DENTRIX ASCEND

Release Notes: August 24, 2021 (Prod 379)

The product update released August 24, 2021 brings many new tools and enhancements to the Dentrix Ascend feature set. A new Statement Submission Report will help you track billing statements sent. There are updates to the Day Sheet and the Deposit Slip Report. You will find exciting changes to the clinical chart, the patient ledger, and more!

Revenue Cycle Management

Statement Submission Report

This update introduces a new standard report which provides insight into your billing activity. The Statement Submission Report summarizes or details the patient statements you sent electronically or printed during a given time frame. To open the report, select **Home > Statement Submission Report**.

The screenshot displays the 'Statement Submission Report' interface. On the left, there are filters for 'Locations' (All, Lee Dental of Clear Lake) and 'Date Range' (08/01/2021 - 08/12/2021). The main area shows a summary for 'Lee Dental of Clear Lake' with a total balance of 123,898.40 for 'Printed in Office (190)' statements. Below this is a table of individual statements.

Date & Time	Statement Type	Patient	Generated From	Balance
▶ Electronic eStatements (0)				
▼ Printed in Office (190)				123,898.40
08/12/2021 2:54 PM	Guarantor	Andy Zimmerman	Billing Statements	72.20
08/12/2021 2:54 PM	Guarantor	Larry Woodruff	Billing Statements	1,328.00
08/12/2021 2:54 PM	Guarantor	Robin Weber	Billing Statements	377.00
08/12/2021 2:54 PM	Guarantor	William White	Billing Statements	77.10
08/12/2021 2:54 PM	Guarantor	Lynn Whitaker	Billing Statements	10.00
08/12/2021 2:53 PM	Guarantor	Diane West	Billing Statements	1,045.65

The report selects a month-to-date date range by default. Click the **Date Range** field to make other selections. Select the locations to include in the report and click **Search** to run the report.

The report begins with a summary for each of three statement types: Electronic Statements, Printed in Office, and Printed and Mailed for Me. Note that **this release does not include the Print and Mail for Me feature**, which we will announce in a future update.

Statement Submission Report for 08/01/2021 – 08/12/2021					Collapse Locations
▼ Lee Dental of Clear Lake					
Date & Time	Statement Type	Patient	Generated From	Balance	
▶ Electronic eStatements (380)				234,767.20	
▶ Printed in Office (190)				123,898.40	
▶ Printed & Mailed for Me (0)					

The count shown in parentheses after the statement type name is how many billing statements you generated or printed during the selected time frame. The **Balance** column shows the sum of the “Please Pay This Amount” values in all the included billing statements.

To see a list of the individual billing statements for any of the types, click the expansion arrow next to the type name.

Statement Submission Report for 08/01/2021 – 08/12/2021					Collapse Locations
▼ Lee Dental of Clear Lake					
Date & Time	Statement Type	Patient	Generated From	Balance	
▶ Electronic eStatements (380)				234,767.20	
▼ Printed in Office (190)				123,898.40	
08/12/2021 2:54 PM	Guarantor	Andy Zimmerman	Billing Statements	72.20	
08/12/2021 2:54 PM	Guarantor	Larry Woodruff	Billing Statements	1,328.00	
08/12/2021 2:54 PM	Guarantor	Lynn Whitaker	Billing Statements	377.00	

If there are more than 100 statements in a section, a **Show More** link at the bottom loads more statements.

The **Generated From** column tells you where you generated the statement, whether it was from the billing statements generator, the patient walkout, or a patient’s individual statement.

You can print this report. Statement rows print either collapsed or expanded depending on their state at the moment you click **Print**.

The Statement Submission Report includes a link to the **Dentrix Ascend Account Portal**. Although the link is active now, its value will come in a future release when the purpose of visiting the portal will be to

pay for Printed & Mailed for Me statements. The portal has instructions for account creation. After you create an account, you will be able to view the statements printed for you and pay for that service.

Billing Statement Enhancements

This update improves the usability of the options to print or send statements. This is in preparation for the upcoming Print and Mail for Me option. The **Actions** menu button now contains all the checkboxes, switches and flyouts that you previously used to send statements.

The screenshot shows a 'Billing Statement' form with a grey header and a close button (X) in the top right. The form contains several sections: 'Statement start date' with radio buttons for 'From last zero balance' (selected), 'Other' (with a text input), and 'Walkout (today only)'; 'Statement view' with radio buttons for 'Guarantor view' and 'Patient view' (selected); 'Statement message' with an information icon and a text input; and checkboxes for 'Include credit card payment options' (checked), 'Include location abbreviation' (unchecked), and 'Include due date as' (checked) with a date input '09/12/2021' and an information icon. At the bottom, there is a dark blue 'Actions' button with a downward arrow and a light grey 'Cancel' button. A red rectangle highlights the 'Actions' button.

This screenshot shows the 'Actions' menu expanded. The menu items are 'Print', 'Send eStatement only' (highlighted in blue), and 'Actions' (with an upward arrow). A light grey flyout box is positioned over the 'Send eStatement only' item, containing a checked checkbox for 'Add to Patient Connection' and a 'Send' button. A mouse cursor is pointing at the 'Send' button. The 'Cancel' button is visible to the right of the menu.

This screenshot shows the 'Actions' menu expanded. The menu items are 'Print' (highlighted in blue), 'Send eStatement only', and 'Actions' (with an upward arrow). A light grey flyout box is positioned over the 'Print' item, containing a checked checkbox for 'Add to Patient Connection', an unchecked checkbox for 'Send eStatement', and a 'Print' button. A mouse cursor is pointing at the 'Print' button. The 'Cancel' button is visible to the right of the menu.

This update brings a simplified workflow for sending electronic statements. Previously we recommended you immediately print statements for patients who could not receive electronic statements. When you use **Send eStatement only**, a new **Billing Statements to Print** box automatically pops up with a list of patients for whom you cannot send an electronic statement. This saves you from having to re-run the billing statement generator.

Billing Statements to Print
✕

Warning. Electronic statements could not be sent to 3 guarantors, due to the lack of a valid email address and/or mobile number. No records have been added to Patient Connection.

<input checked="" type="checkbox"/> Guarantor Name	Balance
<input checked="" type="checkbox"/> Cervantes, Nemesio	693.00
<input checked="" type="checkbox"/> Chart, Pat	270.00
<input checked="" type="checkbox"/> Chiltepin, Isaac	368.00

Actions ▾

Cancel

The list automatically selects all the patients who couldn't receive an eStatement, ready to go to the **Print** action. You can deselect individual patients for whom you do not wish to print.

This update includes a small improvement to the presentation of the electronic statement itself. The statement is now grouped into visits to make it easier to read.

DATE	DESCRIPTION	PATIENT NAME	AMOUNT	BALANCE		
09/25/2020	Credit Card Payment \$195.00*	Pamela Abrams	-38.25	-652.90		
09/26/2020	D1110 - Prophylaxis - Adult [SOJO]	Harrison (Harry) Abrams	65.00	-587.90		
09/25/2020	Full Payment Courtesy \$9.75	Harrison (Harry) Abrams	-9.75			
09/25/2020	Credit Card Payment \$195.00*	Pamela Abrams	-55.25	-652.90		
09/26/2020	D1110 - Prophylaxis - Adult [SOJO]	Jason Abrams	65.00	-587.90		
09/25/2020	Full Payment Courtesy \$9.75	Jason Abrams	-9.75			
09/25/2020	Credit Card Payment \$195.00*	Pamela Abrams	-55.25	-652.90		
02/17/2021	D0150 - Comprehensive Evaluation [SOJO] [SOJO] Location	Brody Abrams	1,500.00	847.10		
(*) = Payments have been split between more than one visit. (**) = Pending insurance payment.						
BALANCE 0-30 DAYS	BALANCE 31-60 DAYS	BALANCE 61-90 DAYS	BALANCE 90+ DAYS	TOTAL BALANCE	ESTIMATED INSURANCE	PATIENT PORTION
0.00	0.00	0.00	2,028.70	2,028.70	333.00	1,695.70

The Patient Connection page now includes colored status icons in the **Delivery** column. This will be particularly useful to show you which electronic statements are In Progress or Failed to be delivered.

Patient Connection							
Statements		Text Messages		● Success ▲ In Progress ▼ Failed			
Date	Statement Type	Patient	Delivery	Total Balance	Patient Portion	Please Pay	Att.
08/12/2021	Guarantor	Andy Zimmerman	● Print	72.20	72.20	72.20	📎
08/12/2021	Guarantor	Andy Zimmerman	● Print	72.20	72.20	72.20	📎
11/03/2020	Guarantor	Andy Zimmerman	● Print	72.20	72.20	72.20	

Clinical

Charting Symbol Priority Update

In the past, certain charting symbols for newer conditions and procedures were hidden behind charting symbols for older conditions and procedures. This update features a new priority order for charting symbols to ensure that the most recent conditions and procedures are visible in the Patient Chart. The following sections give examples of where you will see changes to the layering of charting symbols.

Completed Procedures and Existing Procedures

With this update, most completed procedures overlay existing procedures. Some exceptions are pins, posts, sealants, and apicoectomies.

Example: There is an existing occlusal amalgam restoration on tooth 1. The doctor removes the existing amalgam restoration and replaces it with a MOD composite restoration. In the Chart, the completed procedure will overlay the existing procedure.

Date	Th	Surfaces	Code	Description	Status	Provider ...
08/16/2021	1	MOD	D2393	Posterior Resin Composite 3s	Completed	Ben
07/01/2021	1	O	D2140	Amalgam 1 Surface	Existing	Ben

Procedures and Conditions

Here are some rules for the layering of charting symbols when procedures and conditions are charted on the same tooth.

- Treatment planned procedures overlay conditions despite the posted dates.
- Conditions always overlay existing procedures.
- Conditions overlay completed procedures when the conditions have a more recent date.
- If a condition and a procedure have the same date, the procedure will overlay the condition.

Appointment Handling When Moving Procedures Between Cases

If you are working with a patient that requires multiple visits for treatment-planned procedures, you may need to move those procedures between visits or even treatment cases. When this happens, it may cause you to move all the scheduled procedures out of an appointment you have scheduled for the patient.

In the past, when you moved all scheduled procedures out of an appointment, that appointment was deleted from the Calendar. This led to some frustration when patients showed up for their previously scheduled appointments and there was no record of those appointments in the schedule.

With this release, when you move all scheduled procedures out of an appointment, Dentrix Ascend keeps the empty appointment on the Schedule with a note that the procedures initially scheduled for that appointment were moved to another appointment.

Scheduling Treatment Planned Procedures

When you create a new appointment, you can click **Add Tx Planner** to add procedures from the treatment plan.

The screenshot displays the Dentrix Ascend software interface. On the left, a calendar view shows a grid for August 2021, with a specific appointment for Candice Bentley at 9:00 AM highlighted. The main window shows the appointment details for Candice Bentley (DOB: 12/01/1989, 31 years old). The appointment is currently in an 'Unconfirmed' status. The 'Add Tx Planner' button is highlighted with a red box, indicating its location for adding procedures from the treatment plan. Other visible fields include 'Operator' (DDS 2), 'Appointment Provider' (-Select-), and 'Additional Provider' ([None]).

Attach Treatment Plan

▼ Unassigned procedures

<input type="checkbox"/>	Date	Code	Th	Surface	Description	Appointment
<input checked="" type="checkbox"/>	08/09/2021	D2390	TH: 16		Anterior Resin...	08/24/2021 9:00 AM
<input checked="" type="checkbox"/>	08/09/2021	D2160	TH: 14	MOD	Amalgam 3 S...	08/19/2021 9:00 AM
<input type="checkbox"/>	08/09/2021	D2150	TH: 15	MO	Amalgam 2 S...	

Update appointment Cancel

If you add procedures to the new appointment that have previously been scheduled for a different appointment, Dentrix Ascend will prompt you to confirm the change. You will see which appointments will be left empty (be left with no scheduled procedures) and which appointments will be updated (include procedures other than those you moved).

Attach Treatment Plan

Are you sure you would like to attach the selected Treatment Plan procedure(s) to the current appointment?

This action will update the patient's other Treatment Plan appointment(s) listed below and will affect the scheduled production amount for that day(s):

- 08/19/2021 | 9:00 AM - will be updated
- 08/24/2021 | 9:00 AM - will remain empty in the Calendar

Attach to This Appointment Back to Calendar

By default, Dentrix Ascend will save the empty appointment and add this note to the **Other** field: "The procedure(s) scheduled initially were moved to another appointment dated [XX/XX/XXXX]"

Calendar Today August 2021 Tuesday 24 Production Totals

DDS 2 Candice Bentley 12/01/1989 (31 years old) Preferred Days [None] Preferred Times [None]

Chart Ledger Tx Planner Show production

Appt Contact Info Rel. Appts Med. Alerts Lab Case

Status Unconfirmed Schedule

ASAP Needs Follow-up Premedicate Pinned

Procedure(s) 0 selected * Other The procedure(s) scheduled initial

Procedure search

Add Tx Planner

Operator * Appointment Provider * Additional Provider

DDS 2 Bert - Wombert Halsted [None]

Date Time Length (h:mm)

Save Cancel Delete

Empty appointments will not be deleted from the schedule unless you click **Delete**.

Calendar: Tuesday 24, August 2021

Patient: Candice Bentley, 12/01/1989 (31 years old)

Appointment: 9:00 AM, Candice Bentley

Status: Unconfirmed

Procedure(s): 0 selected * Other: The procedure(s) scheduled initially ...

Operator: DDS 2, Appointment Provider: Bert - Wombert Halsted, Additional Provider: [None]

Buttons: Save, Cancel, Delete

Scheduling Recare

You will also see a confirmation message when you are scheduling recare procedures that had previously been attached to another appointment.

Calendar: Monday 7, February 2022

Patient: Candice Bentley, 12/01/1989 (31 years old)

Appointment: 9:00 AM, Candice Bentley

Status: Unconfirmed

Procedure(s) 0 selected * Other: type a reason here

RECARÉ	DUE DATE	APPOINTMENT
PROPHY	02/11/2022	02/11/2022

Operator: DDS 2, Appointment Provider: -Select-, Additional Provider: [None]

Buttons: Save, Cancel

Attach Recare ✕

Are you sure you would like to attach the selected Recare procedure(s) to the current appointment?

This action will update the patient's other Recare appointment(s) listed below and will affect the scheduled production amount for that day(s):

- 02/11/2022 | 9:00 AM - will remain **empty** in the Calendar

Attach to This Appointment
Back to Calendar

Scheduling Treatment Planned Procedures and Recare

If you are adding previously scheduled recare and treatment planned procedures to a new appointment, the confirmation message will note the changes for all affected appointments.

Attach Treatment Plan & Recare

Are you sure you would like to attach the selected Treatment Plan and Recare procedure(s) to the current appointment?

This action will update the patient's other Treatment Plan and Recare appointment(s) listed below and will affect the scheduled production amount for that day(s):

Treatment plan appointment(s)

- 08/18/2021 | 9:00 AM - will be updated
- 08/19/2021 | 9:00 AM - will remain empty in the Calendar

Recare appointment(s)

- 02/11/2022 | 9:00 AM - will be updated

[Attach to This Appointment](#) [Back to Calendar](#)

Treatment Planner and Progress Notes Section

You will also see a confirmation message in the Treatment Planner and the Progress Notes sections to notify you when deleting a procedure will leave an appointment empty.

The screenshot shows a software interface with a 'Delete Procedure' dialog box. The dialog contains the following text:

Delete Procedure

Are you sure you want to delete this procedure?

Deleting this procedure will also leave the following appointment empty:

- 08/24/2021 9:00 AM

This action can't be undone.

[Delete](#) [Cancel](#)

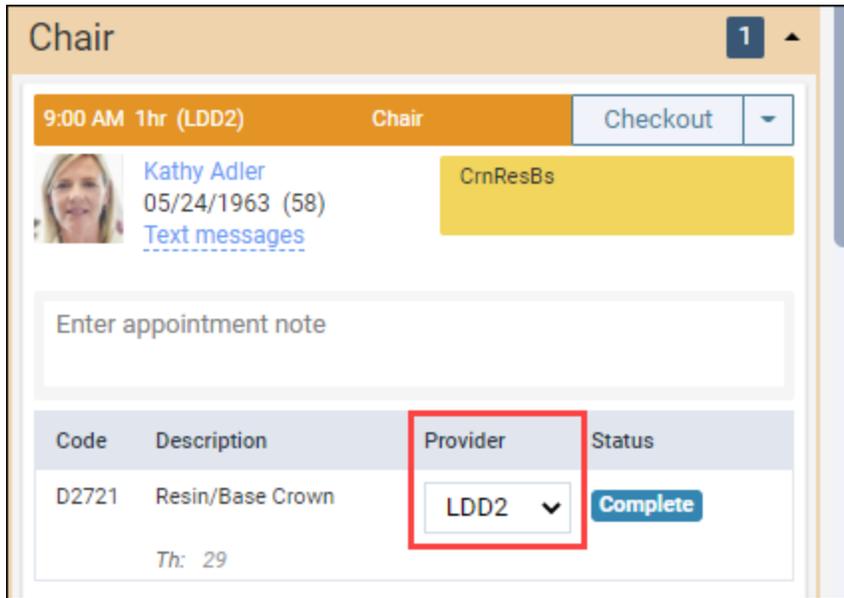
The background interface shows a table of appointments with the following columns: Date, Procedure, Provider, Amount, and Appointment. The table contains three rows of data:

Date	Procedure	Provider	Amount	Appointment
08/09/2021	D2150 15 MO	Amal...	179.00	08/19/2021 9:00 AM
08/09/2021	D2390 16	Anterl...	260.00	08/24/2021 9:00 AM

Scheduling

Provider ID Added to Routing Panel

This update adds a new **Provider** field to the Chair and Checkout statuses in the routing panel.

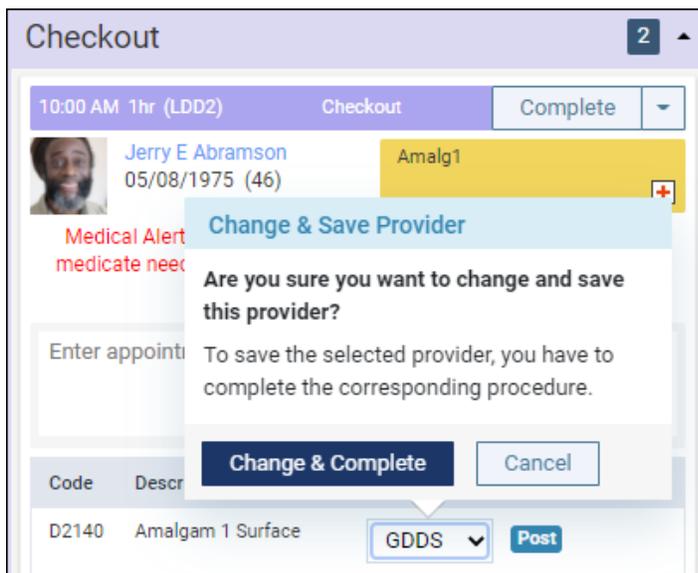


The screenshot shows the 'Chair' routing panel for a 9:00 AM 1hr (LDD2) appointment. The patient is Kathy Adler, 05/24/1963 (58). The procedure is Resin/Base Crown (Code D2721). The 'Provider' dropdown menu is highlighted with a red box and shows 'LDD2' selected. The status is 'Complete'.

Code	Description	Provider	Status
D2721	Resin/Base Crown	LDD2	Complete

The purpose of this field is to allow you to easily assign the correct provider to any procedure in the appointment. By default, this field lists the provider associated with the appointment, but you can update the field to show who actually performed the procedure in real time.

If you need to make a change to a treatment-planned procedure, simply click the dropdown and select from the provider list. For appointment procedures, when you select a different provider from the list a **Change & Save Provider** pop-up asks you to confirm the change and complete that procedure.



The screenshot shows the 'Checkout' routing panel for a 10:00 AM 1hr (LDD2) appointment. The patient is Jerry E Abramson, 05/08/1975 (46). The procedure is Amalgam 1 Surface (Code D2140). The 'Provider' dropdown menu shows 'GDSS' selected. A 'Change & Save Provider' pop-up dialog is displayed, asking for confirmation to change and save the provider. The dialog text reads: 'Are you sure you want to change and save this provider? To save the selected provider, you have to complete the corresponding procedure.' The dialog has 'Change & Complete' and 'Cancel' buttons.

Code	Description	Provider	Status
D2140	Amalgam 1 Surface	GDSS	Post

Things to Know about Changing Providers

- The **Provider** field also appears in the **Post Procedures Complete** box if you make use of the **Complete All** feature, and in the procedure completion confirmation pop-up.
- You cannot use the routing panel to change the provider for completed procedures.
- If the appointment includes multiple procedures, you can only change one procedure at a time (no group changes).
- For treatment-planned procedures, if you change the provider in the patient Progress Notes, that change automatically updates the routing panel. The opposite is also true: updating the provider in the routing panel automatically updates the Progress Notes.
- Your user role must have the **Edit Patient Procedure** right to use this feature.

Patient Information

Discount Plan Expiration Field

This update continues our progress towards a new discount plan type. In this phase, we added a new switch to the Ledger Rules tab of the Ledger Options page.

The screenshot shows the 'Ledger Options' interface with the 'Ledger Rules' tab selected. The page is divided into two main sections: 'Transaction Locking' and 'Insurance Estimates & Write-Offs'. Under 'Transaction Locking', there is a date field set to '07/14/2021' and two radio button options for locking transactions. The first option, 'Automatically lock transactions for posting/editing/deleting that are older than 30 days', is selected. The second option is 'Manually initiate transaction lock as of a specified date'. Under 'Insurance Estimates & Write-Offs', there are two 'Require' sections. The first is 'Require reason(s) for transaction revision' with a 'Yes' switch. The second is 'Require expiration date for discount plans' with a 'No' switch, which is highlighted by a red rectangular box. At the bottom of the page are 'Save' and 'Cancel' buttons.

Toggle the **Require expiration date for discount plans** switch to Yes to require a team member to set an expiration when they assign a patient to the basic uninsured discount plan and fee schedule combination. The default setting on this switcher is No. The expiration date still has no actual effect upon the discount plan; this is merely a preparatory addition.

Reporting

Day Sheet Enhancements

Updated Estimated Net Production Calculation

You now have the option to include charge adjustments and unapplied credit adjustments in the calculation of Estimated Net Production in the Day Sheet.

Day Sheet Report

Filter

Locations

All

Lee Dental of Clear Lake

No other locations are selected

Select Locations

Include Summary ⓘ

Date Range

08/06/2021-08/06/2021

Run By

Transaction date

Include in Estimated Net Prod. ⓘ

Charge adjustments

Unapplied credit adjustments

Report Type

Search Reset

For example, in this patient's Ledger, there is a charge adjustment, a credit adjustment, and some unapplied credit.

Ledger Patient. By statement. All history View

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment ⓘ Primary Guarantor: Candice Bent Patient Walkout

Unapplied Credits -50.00

0 - 30 31 - 60 61 - 90 91+ Balance ⓘ

1.25k + 0.00 + 0.00 + 0.00 = 1.20k

Insurance Portion 0.00 Write-Off Adjustment ⓘ 0.00 Patient Portion 1.20k

Expand All Balance \$1,200.00

Transaction Date	Modified Date	Code	Description	Provider	Amount	Running Balance
08/16/2021			Balance Forward			0.00
▶ 08/16/2021	08/16/2021	D2933	Steel Crown w/ Resin Window Th: 6 ⓘ	Bert	1,000.00	1,000.00
▶ 08/16/2021	08/16/2021	Adj	Charge Adjustment	Bert	600.00	1,600.00
08/16/2021	08/16/2021	Adj	Credit Adjustment \$400.00		-350.00	1,250.00
▶ 08/16/2021	08/16/2021	Adj	Credit Adjustment \$400.00		-50.00	1,200.00

If you run the report without including these adjustments, it looks like this:

Day Sheet Report	
Filter	Day Sheet
Locations	▼ Location - Location Totals
<input checked="" type="checkbox"/> Location	Report Type Current
<input type="checkbox"/> Include Summary ⓘ	Procedure Charges 1,000.00
Date Range	Entered Payments 0.00
08/02/2021-08/02/2021	Applied Payments ⓘ 0.00
Run By	Unapplied Payments 0.00
<input checked="" type="radio"/> Transaction date	Entered Credit Adjustments -400.00
<input type="radio"/> Modified date	Applied Credit Adjustments ⓘ -350.00
Include in Estimated Net Prod. ⓘ	Unapplied Credit Adjustments -50.00
<input type="checkbox"/> Charge adjustments	Charge Adjustments 600.00
<input type="checkbox"/> Unapplied credit adjustments	Charges Billed to Insurance 0.00
Report Type	Estimated Insurance Write-Offs 0.00
All ▼	Estimated Net Production 650.00
Provider	New Patients 0
All providers ×	Patients Seen 1
Search Reset	Average Production Per Patient 1,000.00
	Average Charge Per Procedure 1,000.00

When the adjustments are included, the report looks like this:

Day Sheet Report	
Filter	Day Sheet
Locations	▼ Location - Location Totals
<input checked="" type="checkbox"/> Location	Report Type Current
<input type="checkbox"/> Include Summary ⓘ	Procedure Charges 1,000.00
Date Range	Entered Payments 0.00
08/02/2021-08/02/2021	Applied Payments ⓘ 0.00
Run By	Unapplied Payments 0.00
<input checked="" type="radio"/> Transaction date	Entered Credit Adjustments -400.00
<input type="radio"/> Modified date	Applied Credit Adjustments ⓘ -350.00
Include in Estimated Net Prod. ⓘ	Unapplied Credit Adjustments -50.00
<input checked="" type="checkbox"/> Charge adjustments	Charge Adjustments 600.00
<input checked="" type="checkbox"/> Unapplied credit adjustments	Charges Billed to Insurance 0.00
Report Type	Estimated Insurance Write-Offs 0.00
All ▼	Estimated Net Production 1,200.00
Provider	New Patients 0
All providers ×	Patients Seen 1
Search Reset	Average Production Per Patient 1,000.00
	Average Charge Per Procedure 1,000.00

Tooth and Surface Information for Deleted Procedures

If you delete a procedure, the tooth and surface information will now be included in the deleted record in the Day Sheet.

Day Sheet							
Collapse All Print							
▼ Location - Location Details							
Transaction Date	Modified Date	Patient Name	Code	Description	Charges	Credits	Provider
08/02/2021	08/02/2021 *	Kathy Jones	Adj	Credit Adjustment		-400.00	
08/02/2021	08/02/2021	Kathy Jones	Adj	Charge Adjustment	600.00		jax
08/02/2021	08/02/2021	Kathy Jones	D2140	Amalgam 1 Surface Th: 6 (MD)	0.00		jax
08/02/2021	08/02/2021 *	Kathy Jones	D2933	Steel Crown w/ Resin Window. Th: 6	1.00k		jax
Total					1.60k	-400.00	

Display Patient Names in the Deposit Slip Report

This update enhances the Deposit Slip Report by adding patient names to the report. The main benefit of this change is that now you can see the patients included in a bulk insurance payment. Dentrix Ascend assumes that payments sharing the same check number, carrier, and transaction date are part of the same bulk insurance payment.

Deposit Slip Report						Print
Lee Dental of Clear Lake				Transaction date period: 08/13/2021-08/13/2021		
Insurance Check Payments						Collapse rows
Transaction Date	Patients	Carrier Name	Bank	Check #	Amount	
08/13/2021		Denti-Cal		26263	144.00	
08/13/2021		Ameritas		001626747	375.00	
	Kathy Adler				120.00	
	Patsy Brandt				83.00	
	Teresa (Teresa) Barry				172.00	
2 items					Total	519.00
					Subtotal	519.00

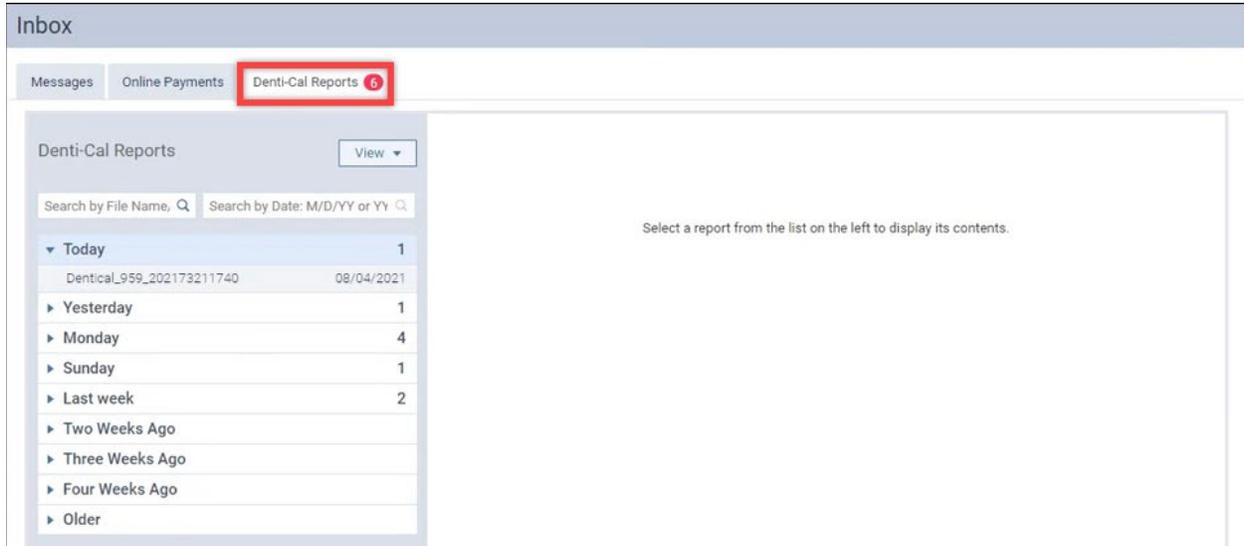
If an insurance carrier pays for multiple claims with one check, the payments applied to each claim show as individual line items in the expanded view of the report.

Payment rows print either collapsed or expanded depending on their state when you click **Print**.

Denti-Cal Reporting Enhancements

The following enhancements only affect practices in California working with Denti-Cal.

This release features additional enhancements to Denti-Cal Reports in the Inbox.



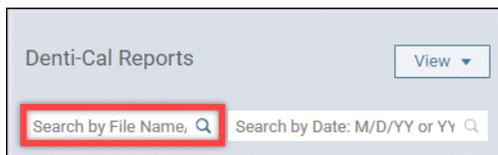
To view Denti-Cal Reports, you must have the **Review Denti-Cal Reports** right. To manage the reports, you must have the **Manage Denti-Cal Reports** right.

Filter the Report List

Dentrix Ascend initially only displays Denti-Cal reports within the past four weeks. This is to help decrease loading times. Still, the list of reports may be quite long. This release introduces several ways to filter and search the list to find the report you are looking for.

Search by File Name, Patient Name, or Other Piece of Information

Use the Search by File Name field to search for a specific file name, patient name, report type, or other piece of information. Dentrix Ascend will show you a list of all the reports within the past four weeks that contain the piece of information you searched for.



Search by Date or Time Range

Use the Search by Date field to filter the report list by a specific date or time range. Dentrix Ascend will show you a list of all the reports that fall on the date or within the time range you search for. The limit for the time range is 30 days.

Denti-Cal Reports View ▾

Search by File Name, Search by Date: M/D/YY or YY

▼ Today	07/01/2021 - 07/31/2021	1
Dental_959_202173211740	Today	1/2021
▶ Yesterday	Yesterday	1
▶ Monday	Last 7 Days	4
▶ Sunday	This Month	1
▶ Last week	Last Month	2
▶ Two Weeks Ago	Specific Date ▶	
▶ Three Weeks Ago	Custom Range ▶	
▶ Four Weeks Ago		
▶ Older		

Search for Older Reports

As stated above, the report list initially shows reports within the last 4 weeks. To search for a report that falls outside of that window, you will need to use the Search by Date field. To reduce loading time, be specific with your search parameters. Use both of the Search fields to narrow your search further.

Denti-Cal Reports View ▾

Dental_959_202173211740 Unresolved

*CPSRPT0157162980502DR101117080CAMED 870426999665516531
 REPORT ID: CP-0-959-P DENTI-CAL

BECKY 07/29/2021 - 08/04/2021

Dental_959_202173211740 07/29/2021 - 08/04/2021

Start date End date

JUNE 2021							JUNE 2021						
SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1	2	3	4	5	30	31	1	2	3	4	5
6	7	8	9	10	11	12	6	7	8	9	10	11	12
13	14	15	16	17	18	19	13	14	15	16	17	18	19
20	21	22	23	24	25	26	20	21	22	23	24	25	26
27	28	29	30	1	2	3	27	28	29	30	1	2	3
4	5	6	7	8	9	10	4	5	6	7	8	9	10

Today
 Yesterday
 Last 7 Days
 This Month
 Last Month
 Specific Date ▶
 Custom Range ▶ Done

Denti-Cal Reports View ▾

Dental_959_202173211937 Unresolved Claims

*CPSRPT0157162980502DR101117080CAMED 870426999665516531
 REPORT ID: CP-0-959-P DENTI-CAL RUN ON: 10/10/17
 PERIOD ENDING: 10/10/17 PROVIDER/SVC OFC PAGE: 1
 PROGRAM ID: DCB96985 ... DOCUMENT REJECTIONS

BECKY 06/01/2021 - 06/30/2021

Dental_959_202173211937	06/28/2021
Dental_959_202173211942	06/07/2021

PROV/SVC	PROVIDER	RECIPIENT	NAME	D	SSN/CIN	RSN
OR NPI	DCN	LAST	FIRST	T	OR MEDS	BASE DCN CD
1881766848	739544722	BLUE	BECKY	C		A

PROVIDER/SERVICE OFC TOTALS

Search for Outstanding Claims

Once you have found the correct Denti-Cal report, you can associate that report with a patient insurance claim. Use the Search Patient/Claims field to search all outstanding Denti-Cal claims in your practice. Type a patient's name. Then select a claim from the list.

The screenshot shows the 'Denti-Cal Reports' interface. On the left, there is a search bar with 'BECKY' and a date range of '06/01/2021 - 06/30/2021'. Below the search bar, two reports are listed: 'Dentalca_959_202173211937' dated '06/28/2021' and 'Dentalca_959_202173211942' dated '06/07/2021'. The main area displays the report 'Dentalca_959_202173211937' with 'Unresolved Claims' and a search filter set to 'blue'. A table lists claims with columns for Patient, DOB, Service Date, Subscriber ID, Insurance Plan, and Amount Billed. The row for 'Blue, Becky' is highlighted in blue and has a red box around it. Below the table is a section for 'PROV/SVC OR NPI' and 'PROVIDER DCN', followed by 'RECIPIENT NAME' and 'D SSN/CIN'. At the bottom, there is a 'PROVIDER/SERVICE OFC TOTALS' section with a list of error codes and counts.

Patient	DOB	Service Date	Subscriber ID	Insurance Plan	Amount Billed
Blue, Matt	01/01/1970	08/02/2021	2345	Postal Workers of CA	275
Blue, Becky	02/02/1970	08/03/2021	2345	Postal Workers of CA	248

PROV/SVC OR NPI PROVIDER DCN RECIPIENT NAME D SSN/CIN

1881766848 739544722 GXXXX Jxxxx C A

PROVIDER/SERVICE OFC TOTALS

- A - INVALID PROV/SVC OFC : 1
- B - INVALID C/H : 0
- C - INVALID PROV/CH : 0
- D - BATCH REJECTED : 0
- E - RECORD COUNTS MISMATCH : 0
- F - INVALID PROVIDER NAME : 0
- G - DUPLICATE DOCUMENTS : 0
- H - SECOND NOA ISSUED : 0

The Denti-Cal Report patient dialog appears. You have two options in this dialog.

The dialog box is titled 'Denti-Cal Report - Becky Blue'. It asks 'What would you like to do for this report?' and has two checked options: 'View Claim Detail' and 'Copy Report to Document Manager'. A warning message states: 'Warning. This report must include only the selected patient's claim information. No other patients should be listed on the report.' At the bottom, there are 'Continue' and 'Cancel' buttons.

- Select **View Claim Detail** to view the Claim Detail so that you can add a status note to the claim.

- Select **Copy Report to Document Manager** to add the selected Denti-Cal report to the patient’s Document Manager. This action takes place in the background. You will see a green success message when this action is complete. Navigate to the Document Manager to view the file.

Warning: Sometimes Denti-Cal reports contain information on multiple patients. Make sure that the report you are attaching only contains information on the selected patient.

After you select one or both of the checkboxes, click **Continue** to open the Claim Detail window or to copy the report to the Document Manager.

Link to Unresolved Claims

There is now a hyperlink on every Denti-Cal Report so that you can quickly navigate to the Unresolved Claims report.

The screenshot shows the 'Denti-Cal Reports' interface. At the top, there is a search bar for 'Dentical_959_20217' and a 'View' dropdown. The main report title is 'Dentical_959_202173211740' with a date of '08/04/2021'. A red box highlights the 'Unresolved Claims' link in the top right corner. Below the header, there is a table with columns: PROV/SVC OR NPI, PROVIDER DCN, RECIPIENT NAME LAST FIRST, D T OR MEDS, SSN/CIN, and RSN BASE DCN CD. The table contains one row of data. Below the table, there is a section for 'PROVIDER/SERVICE OFC TOTALS' with a list of error codes and their counts.

PROV/SVC OR NPI	PROVIDER DCN	RECIPIENT NAME LAST FIRST	D T OR MEDS	SSN/CIN	RSN BASE DCN CD
1881766848	739544722	GXXXX JXXXX	C		A

PROVIDER/SERVICE OFC TOTALS

A - INVALID PROV/SVC OFC	: 1
B - INVALID C/H	: 0
C - INVALID PROV/CH	: 0
D - BATCH REJECTED	: 0
E - RECORD COUNTS MISMATCH	: 0
F - INVALID PROVIDER NAME	: 0
G - DUPLICATE DOCUMENTS	: 0
H - SECOND NDA ISSUED	: 0
I - INVALID RETURN DCN	: 0

The Unresolved Claims page includes a link back to the Denti-Cal Reports page for quick access.

The screenshot shows the 'Unresolved Claims' page with a total of 53 claims worth \$17,035.00. On the left, there is a list of insurance providers with their respective claim counts and amounts. On the right, there is a detailed view of a claim for 'Delta Dental of Michigan' with a phone number '(800) 524-0149'. A red box highlights the 'Denti-Cal Reports' link in the top right corner. The claim details include subscriber information, service date, and procedures.

Provider	Count	Amount
Blue Cross Blue Shield of Texas	1	\$72.00
Patients	6	\$2,027.00
Genworth Life & Health Insurance Co (GLHIC)	4	\$649.00
CIGNA/ EQUICOR	14	\$3,331.00
Humana	1	\$167.00
Prudential Dental Organization (PDO)	4	\$1,675.00
JLT Services Corporation	1	\$293.00

Delta Dental of Michigan (800) 524-0149

Overdue Claim [Review/Edit]

Subscriber ID	351368057	Service date	05/03/2014
Subscriber	Josh Novak	Created on	05/03/2014
Birthdate	08/20/1940	Patient	Josh Novak
		Birthdate	08/20/1940
Amount	\$ 711.00	Status	Sent
Rendering provider	DDS3 - Salvatore Gillespie (DDS3)	Procedures	D2391(Posterior Resin Composite 1s), D2391(Posterior Resin Composite 1s)

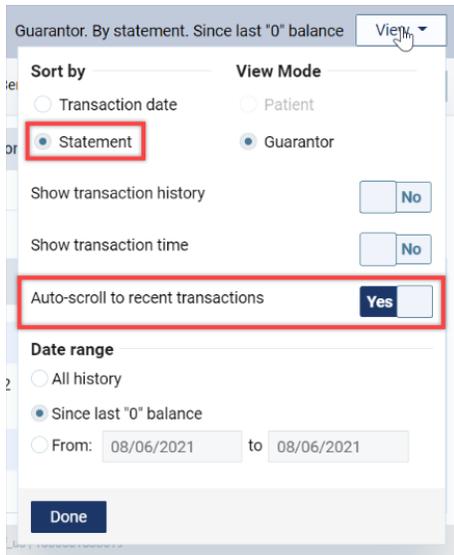
Usability

Ledger Enhancements

Auto Scroll to Most Recent Transaction

When working in the Ledger for a patient with an extensive history, it can be time-consuming to find the most recent transaction. With this new release, you will be able to see the most recent transaction right after opening the Ledger.

In the Ledger, click the **View** menu, and set the transaction list to **Sort by Statement**. Then toggle the **Auto-scroll to recent transactions** switcher to Yes. Now, each time you open the Ledger, Dentrix Ascend will automatically scroll to the most recent transaction. This feature is enabled by default, but you may switch it off according to your preference. Auto scroll is not available in the Transaction date view.

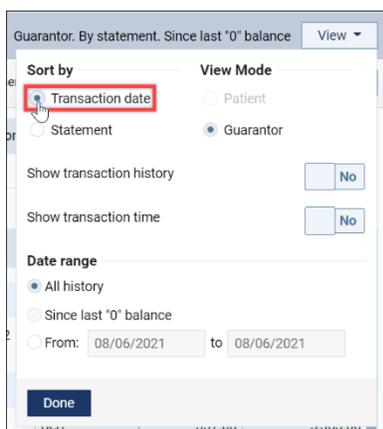


Transaction Date Sorting Order

This release features another enhancement in the Ledger. Currently, you can change the sorting order of the **Transaction Date** column from oldest to newest or newest to oldest by clicking the column header.

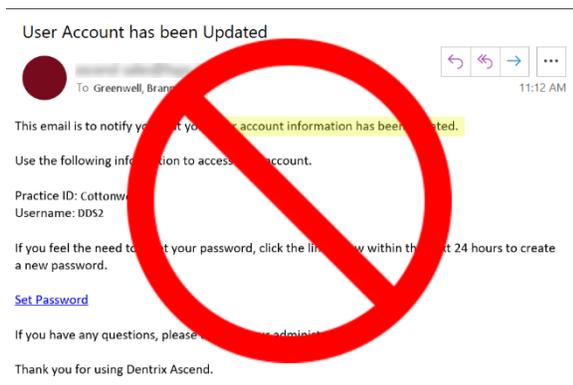
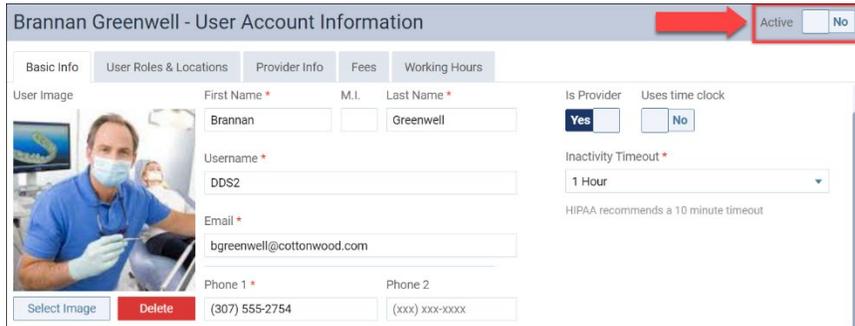
Transaction Date	Modified Date	Patient
05/31/2021		
▶ 07/01/2021	08/05/2021	Candice Bentley
▶ 07/01/2021	08/05/2021	Candice Bentley
▶ 07/01/2021	08/05/2021	

With this release, Dentrix Ascend will now remember the sorting order that you select and automatically sort the Transaction Date column according to that order the next time you visit the Ledger. Note that to be able to change the sorting order of the **Transaction Date** column, you must select Sort by Transaction date in the **View** menu.



No Emails to Inactive Users

In the past, inactive users were receiving account update emails when their user account information changed or the rights associated with their role changed. As of this release, inactive users will no longer receive emails when you make changes to their account or their assigned roles.



User Rights

This release includes the following user right changes:

- The **Edit Patient Procedure** right now extends to include procedure provider selection in the routing panel appointment cards.

New Learning Content

Dentrix Ascend includes access to hundreds of articles that can answer a wide variety of questions, available at any hour of the day and every day of the week. Here are some popular topics. Click a title to open the topic.

[Online Booking Overview](#)

Why make a patient wait a minute longer than necessary when they're ready to book an appointment? When you offer online booking, you give your patients the flexibility to book 24/7.

[Scheduling Related Patients](#)

By selecting any patient in Dentrix Ascend, you can quickly check to see whether related patients (i.e., a spouse, a dependent, etc.) have their next appointment scheduled.

[Using the Chairside Dashboard](#)

Using the Chairside dashboard streamlines processes and saves time so that you don't have to keep switching tabs while working on a patient.

[Adding a New Patient Record](#)

Probably the most fundamental task you will do is add a patient record. Dentrax Ascend automatically searches existing patients to help prevent duplicate records in your database.