

DENTRIX ASCEND

Release Notes: January 05, 2023 (Prod 403)

With this update, the subscription-based product known as Voice Perio is now called Dentrix Ascend Voice because you can now use it not only to dictate perio exams but also to dictate clinical notes. The ability to define and remember custom operator and provider groups in the Calendar is also included with this update. There is also a new sorting enhancement to the Day Sheet.

Scheduling

Custom Schedule Views

You have always been able to use the Calendar View menu to customize which operatories or providers are visible; however, there was no permanence to your view. With this update, you can define view groups that will be ready for you to use over and over again. The new enhancements are called Operator Group and User Group.

The screenshot shows the Dentrix Ascend interface with the 'View' dropdown menu open. The 'View' dropdown is highlighted with a red box. The 'Columns by' section is also highlighted with a red box, showing the following options:

- Operator
- Provider
- Operator Group
- User Group

The 'View mode by' section shows the following options:

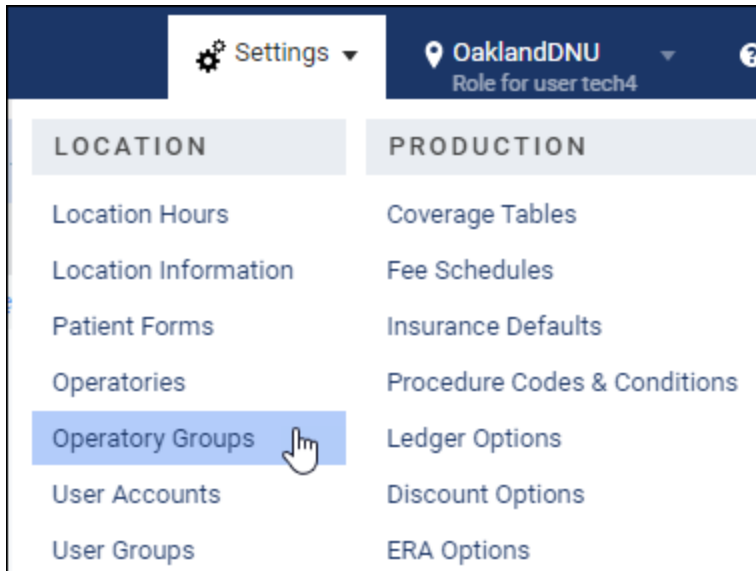
- Day
- Week

The 'Show all operatories' checkbox is checked. The 'Search' field is empty. The 'Production Totals' table is visible on the right side of the screen.

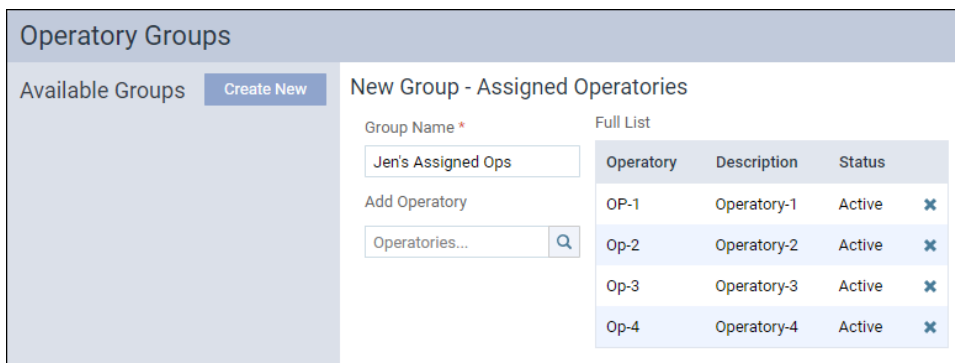
Production Totals	
Practice Event	
	7 AM
	10
	20
	30
	40
	50
	8 AM
	10
	20
	30
	40
	50
	9 AM
	10

Operator Groups

To define an Operator Group, go to **Settings > Operator Groups** and click **Create New**. Note that Operator Groups are location-specific. The group name is limited to 25 characters. There is no added user right associated with Operator Groups.



Enter a name for this group in the **Group Name** field, and then use the **Add Operatory** search field to find the operatories you want to include. When you are done, click **Save**.



To make use of this group, open the Calendar **View** menu. Select **Columns by Operatory Group**, and then select your group from the list. The Calendar view will update accordingly.

Time block size
 Large Medium Small

Show only business days Off

Show missed appointments On

Show template time slots Off

Warn when double-booking Off

Hide patient names Off

Include charge adj. in production calculation No

Include unapplied credit adj. in production calculation No

Columns by
 Operator
 Provider
 Operator Group
 User Group

View mode by
 Day
 Week

Show all groups

Search

Jen's Assigned Ops

Done

User Groups

To define a User Group view, go to **Settings > User Groups** and click **Create New**. The group name is limited to 25 characters. User Groups are organization-wide, but note that when you open a User Group view you will see only those providers that have user roles in your selected location. There is a new **Create/Update User Group** user right associated with the creation of User Groups. (See “User Rights” below for more information.)

User Groups

Available Groups [Create New](#)

New Group - Assigned Users

Group Name * [Full List](#)

User	Username	Specialty	Status
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User Specialty

Add User

Use the **User Specialty** filter as an aid to find providers of the same type, for example hygienists or endodontists. Only providers of the type you select will show up in the search results. Use the **Add User** search box to find the specific providers you want to include in this view. When you are done, click **Save**.

User Groups

Available Groups Create New

New Group - Assigned Users

Group Name *

User Specialty

Add User

User	Username	Specialty	Status
Artem Lutsko	alutsk	Dentist	Active ✕
Alex Voloshka	AVoloshka	Dentist	Active ✕
Bernard Low	Bern	Dentist	Active ✕
Steven Smith	DMD1	Dentist	Active ✕

To make use of this group, open the Calendar **View** menu. Select **Columns by User Group**, and then select your group from the list. The Calendar view will update accordingly.

Time block size Large Medium Small

Show only business days Off

Show missed appointments On

Show template time slots Off

Warn when double-booking Off

Hide patient names Off

Include charge adj. in production calculation No

Include unapplied credit adj. in production calculation No

Columns by Operator Provider Operator Group **User Group**

View mode by Day Week

Show all groups

Search

Smiley Smile Dental Assoc

Done

An operator can be included in multiple Operator Groups, and a user can be included in multiple User Groups.

You can select multiple groups for your custom view. If your list of groups is long, make use of the Search box above the groups list.

If an operator or a user gets inactivated, they will remain in your defined groups, with an updated status of Not Active in red. An inactive operator or user will not appear in the view.

Reports

Day Sheet Enhancement

With this update you can now sort the Location Details section on the Day Sheet Report by the **Description** column to help you visualize the data better or to group like payment types on the printed

version of the report. Note that when you run the Day Sheet Report for a date range and then group the report by Description, the entries will be ordered by Description and then by Transaction Date.

Day Sheet							
▼ The Smiley Smile Center - Location Details							
Transaction Date	Modified Date	Patient Name	Code	Description	Charges	Credits	Provider
01/02/2023	01/02/2023	Cassandra B...	Pay	Credit Card Payment		-137.60	
12/26/2022	01/02/2023	Adrienne Mann	Pay	Credit Card Payment		-215.20	
01/02/2023	01/02/2023	Elenilza Dalton	Adj	Credit Adjustment		-8.87	
12/13/2022	01/02/2023	Irene Hansen	Pay	Check Payment		-85.00	
12/12/2022	01/02/2023	William (Bill) ...	Pay	Check Payment		-100.00	
12/27/2022	12/27/2022	Mrs. Jane (J...	Pay	Cash Payment		-1.00	
12/26/2022	01/02/2023	Devon Callah...	Pay	Cash Payment		-120.00	
Total					0.00	-667.67	

Usability

Event Enhancement

Now when you create a new operatory in the Calendar, it will automatically be included in a scheduled event if **All operatories** was selected when the event was set up. Not having to add an event manually to a new operatory saves you time.

User Rights

This update introduces the new **Create/Update User Group** right under the Settings Assigned Access Rights. You must select **Review User Group** first to enable the Create/Update User Group right. This right grants the ability to create provider user groups for custom views in the Calendar. With the "Review User Group" right selected, the **Delete User Group** option is also available so you can grant the right to delete user groups.

Admin - Assigned Access Rights [Assigned to 8 user\(s\)](#)

Role name *

Full List

Security Category	Assigned Access Rights		
<ul style="list-style-type: none"> Review User Edit Working Hours Manage Location Informati... Create procedure codes Review recare setup 	<ul style="list-style-type: none"> Create New User Inactivate User Set up Location Access Re... Edit procedure/condition c... Manage recare setup 	<ul style="list-style-type: none"> Edit User Review Location Information Review procedure/conditio... Delete/Inactivate procedur... Review referral sources 	
<input checked="" type="checkbox"/> All available rights ⬆			
<input checked="" type="checkbox"/> Review User	<input checked="" type="checkbox"/> Create New User	<input checked="" type="checkbox"/> Edit User	
<input checked="" type="checkbox"/> Review prescription	<input checked="" type="checkbox"/> Create prescription (template)	<input checked="" type="checkbox"/> Edit prescription	
<input checked="" type="checkbox"/> Delete prescription	<input checked="" type="checkbox"/> Manage Printed Prescription For...	<input checked="" type="checkbox"/> Manage Web Profile	
<input checked="" type="checkbox"/> Review Communications setup	<input checked="" type="checkbox"/> Manage Communications setup	<input checked="" type="checkbox"/> Review/Generate letters	
<input checked="" type="checkbox"/> Manage letters	<input checked="" type="checkbox"/> Manage clinical note templates	<input checked="" type="checkbox"/> Distribute clinical note templates	
<input checked="" type="checkbox"/> Manage Shareable Set	<input checked="" type="checkbox"/> Manage coverage f		
<input checked="" type="checkbox"/> Review role	<input checked="" type="checkbox"/> Create/Update role		
<input type="checkbox"/> Review User Group	<input checked="" type="checkbox"/> Review Insurance Defaults	<input type="checkbox"/> Create/Update User Group i	
<input checked="" type="checkbox"/> Edit Insurance Defaults	<input type="checkbox"/> Delete User Group i	<input checked="" type="checkbox"/> Review ledger options	
<input checked="" type="checkbox"/> Manage ledger options	<input checked="" type="checkbox"/> Review Discount Options	<input checked="" type="checkbox"/> Edit Discount Options	
<input checked="" type="checkbox"/> Move transaction lock date forward	<input checked="" type="checkbox"/> Move transaction lock date back...	<input checked="" type="checkbox"/> Review Patient Forms	
<input checked="" type="checkbox"/> Manage Patient Forms	<input checked="" type="checkbox"/> Manage Organization Forms	<input checked="" type="checkbox"/> Create transaction tags	
<input checked="" type="checkbox"/> View Credit Card Options	<input checked="" type="checkbox"/> Manage Credit Card Options		

Please select "Review User Group" to enable this right.

New Learning Content

The Education Team continuously adds new content for Dentrix Ascend. Below are the latest examples. Click the title to get more information about these topics.

[Video: Adding a Clinical Note Using Dentrix Ascend Voice](#)

Voice dictation allows providers to create more complete notes, without the need for abbreviations or shorthand, making notes clearer and easier to understand.

[Blog: Selecting All Operatories When Scheduling an Event](#)

Although setting up your schedule takes time, there is a shortcut you can use to block all operatories in the schedule at one time when you know the office will be closed, such as for holidays and staff meetings.

[Blog: What You Should Do When You are Expecting Inclement Weather](#)

Even though severe weather is coming, patients still need to be seen, especially if they are in pain. You also know that your internet could go down. At this moment, you want to do everything you can do to prepare for any issues that you may have.