

DENTRIX ASCEND

Release Notes: June 23, 2020 (Prod 357)

The product update released June 23, 2020, adds a COVID-19 patient screening form to the Patient Forms suite. You can edit copayment coverage templates in bulk by uploading a .CSV file, and the routing panel has a new button for completing all the procedures in an appointment at once. You can now print the 2019 ADA claim form for carriers with that requirement.

Patient Information

COVID-19 Patient Questionnaire Form

Protect your patients and team members by screening patients in advance of their coming into your practice using ADA-approved questions. Send a link to this new form to support your virtual waiting room plan.


COVID-19 Patient Screening ✕

COVID-19 Patient Screening Edit Sign out

06/02/2020

COVID-19 Patient Screening

NO	Do you have a fever or have you felt hot or feverish recently (14-21 days)?
NO	Are you having shortness of breath or other difficulties breathing?
NO	Do you have a cough?
NO	Do you have any flu-like symptoms, such as gastrointestinal upset, headache or fatigue?
NO	Have you experienced recent loss of taste or smell?
NO	Have you had any contact with any confirmed COVID-19 positive patients?
YES	Is your age over 60?
NO	Do you have heart disease, lung disease, kidney disease, diabetes or any auto-immune disorders?
NO	Have you traveled in the past 14 days to any regions affected by COVID-19?

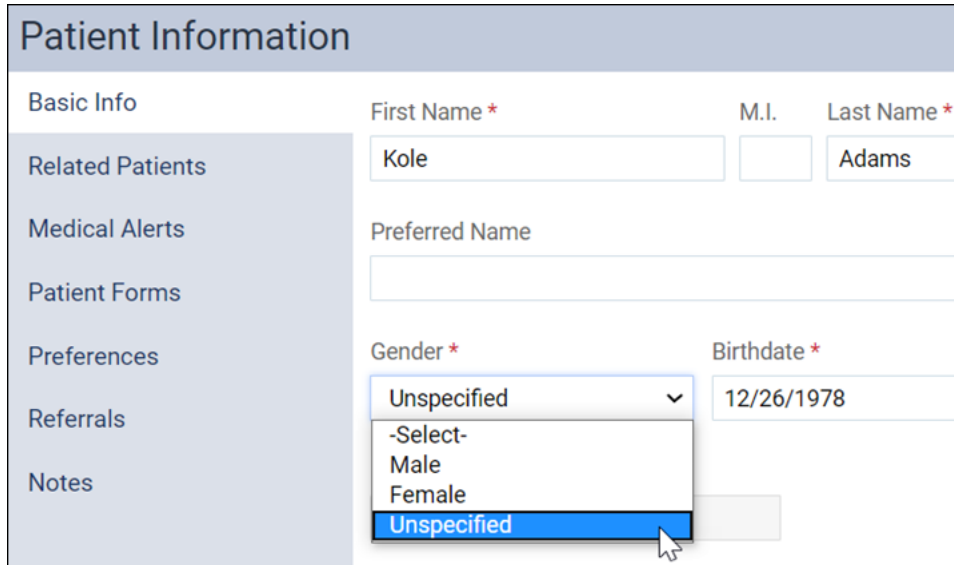
Signature


[Click here](#) for a refresher on how to send this questionnaire to patients as they arrive at your practice location.

Unspecified Gender Identity

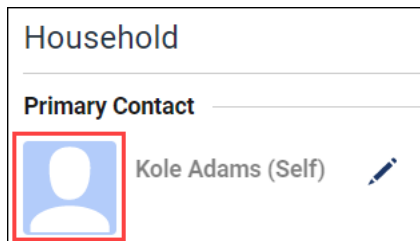
Dentrix Ascend now makes available a printed 2019 ADA insurance claim form. The **Gender** field in this form includes “U” (unspecified) as an option. To support this feature, you will see several changes in the Dentrix Ascend platform. For example:

The **Gender** field in the patient **Basic Info** tab now includes Unspecified as an option.



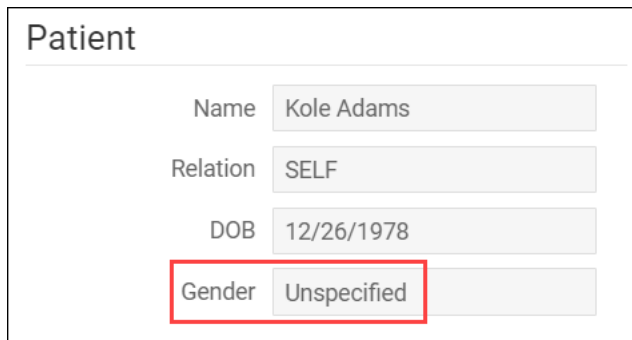
The screenshot shows the 'Patient Information' form with a sidebar on the left containing menu items: Basic Info, Related Patients, Medical Alerts, Patient Forms, Preferences, Referrals, and Notes. The main form area has the following fields: First Name * (Kole), M.I. (empty), Last Name * (Adams), Preferred Name (empty), Gender * (Unspecified), and Birthdate * (12/26/1978). A dropdown menu is open for the Gender field, showing options: -Select-, Male, Female, and Unspecified (highlighted in blue with a mouse cursor pointing to it).

When a patient’s gender is unspecified, and there is no patient picture, the patient avatar becomes a non-gender-specific icon.



The screenshot shows the 'Household' form with a 'Primary Contact' section. Below the section title is a red-bordered box containing a non-gender-specific icon (a blue circle with a white person silhouette) and the text 'Kole Adams (Self)' with a pencil icon to its right.

The online demographics form includes a Neither option for gender, and in pages or windows where gender is indicated, unspecified gender displays as “U” or “Unspecified” according to the field.



The screenshot shows the 'Patient' demographics form with the following fields: Name (Kole Adams), Relation (SELF), DOB (12/26/1978), and Gender (Unspecified). The Gender field is highlighted with a red border.

Insurance

Copayment Coverage Table Import from .CSV File

Next time you need to create a copayment coverage table, you can do that quickly and in bulk by importing a .CSV file. You still have the option to add procedures manually.

To import copayments from a file, open the Coverage Table Setup page (**Settings > Coverage Tables**) and select the coverage table you would like to edit (you can also import information into a new coverage table after first creating the table). Click the new **Import from File** button at the bottom of the page.

The screenshot shows the 'Coverage Table Setup' interface. On the left, there's a 'Templates' sidebar with 'Insurance Coverage, %' (47) and 'Patient Copayment, \$' (2) selected. The main area is titled 'New Coverage Table Template'. It has a 'Template name' field with 'Salt Lake City' and a 'Type' dropdown with 'Patient Copayment, \$'. Below this are 'Procedures' (to edit, please click a table row), 'Manage Exceptions', and 'Add Procedure' buttons. A table with columns 'Code', 'Description', 'Deductible Type', 'Copayment \$', and 'EXC' is shown, but it's empty with the message 'No procedures have been added yet'. At the bottom, there are 'Create', 'Import from File' (highlighted with a red box), and 'Cancel' buttons.

There are several steps to importing a coverage table, and a wizard walks you through it.

The screenshot shows the 'Import Table from File' wizard. It has a progress bar with four steps: 'File Upload' (active), 'Select Code Column', 'Select Copayment Column', and 'Select Deductible Type Column'. The main area is a dashed box containing the text 'Drop CSV File Here' with an information icon, 'or', and a 'Browse' button. Below this is a note: 'A file should be less than 20 MB and contain at least two columns.' At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.

The first thing to do is to acquire the file. You can do this by dragging the file into the work area or by using the **Browse** button to open an explorer window. Note that your file format and extension *must* be .CSV, which is an Excel or text file option. Only two columns are required: the procedure code, and the copayment amount (you may optionally include a deductible type column). Dentrix Ascend ignores any additional columns of information. After the file uploads, the wizard automatically advances to the next step.

If your file includes descriptions at the top of each column, toggle the **Table has header row** switcher to On.

Import Table from File: "MyCoplayTable.csv" ✕

Steps File Upload **Select Code Column** Select Copayment Column Select Deductible Type Column

Table has header row **On**

A B C D

Code	Name	Type	Amount
D0120	Periodic Evaluation	Preventive	\$10.00
D0180	Periodontal Evaluation	Preventive	\$10.00

← Back Next → Cancel

In the **Select Code Column** step, click the radio button of the column that contains the procedure code. The procedure code format must *exactly* match the ADA codes in your Procedure Codes & Conditions page (for example no space allowed between the D and the number) or else the code will not import. Multi-codes do not import. Click **Next**.

Import Table from File: "MyCoplayTable.csv" ✕

Steps File Upload **Select Code Column** Select Copayment Column Select Deductible Type Column

Table has header row **On**

A B C D

Code	Name	Type	Amount
D0120	Periodic Evaluation	Preventive	\$10.00
D0180	Periodontal Evaluation	Preventive	\$10.00

← Back Next → Cancel

In the **Select Copayment Column** step, click the radio button of the column that contains the copayment amount. It doesn't matter if the amount format includes a "\$" or not. Click **Next**.

Import Table from File: "MyCopayTable.csv" ✕

Steps File Upload Select Code Column **Select Copayment Column** Select Deductible Type Column

Table has header row On

A
 B
 C
 D

Code	Name	Type	Amount
D0120	Periodic Evaluation	Preventive	\$10.00
D0180	Periodontal Evaluation	Preventive	\$10.00

If your .CSV includes a column with the deductible type, toggle the **Deductible type column is present in file** switcher to Yes. Then, click the radio button of the column that contains the deductible type. The allowed values for this column are Basic, Preventive, Orthodontic, or Major. Any other description will import as None. Click **Import**. Be patient while the wizard works.

Import Table from File: "MyCopayTable.csv" ✕

Steps File Upload Select Code Column Select Copayment Column **Select Deductible Type Column**

Table has header row On

Deductible type column is present in file Yes

A
 B
 C
 D

Code	Name	Type	Amount
D0120	Periodic Evaluation	Preventive	\$10.00
D0180	Periodontal Evaluation	Preventive	\$10.00

Once the import is complete, Dentrix Ascend reports any errors it encountered.

Warning. The following procedure codes do not exist in the database and were skipped during the import:
D0179870

The last step in the update is to review the import results. You can make manual adjustments if needed at this time.

Coverage Table Setup New Coverage Table

Templates

- Insurance Coverage, % 47
- Patient Copayment, \$ 16
- All Procedures

Edit - Salt Lake City

Template name * Type *

Procedures * (to edit, please click a table row) Manage Exceptions Add Procedure

Code	Description	Deductible Type	Copayment \$	EXC	
D0120	Periodic Evaluation	Preventive	10.00	0	✕
D0140	Limited Evaluation	Preventive	10.00	0	✕

Save Save As New Template Import from File Cancel Delete

When you finish the review, click **Save**.

Note that in an insurance plan copayment table, the button named **Delete** in the template window was renamed **Clear Coverage Table** because a plan must always have a table, but it can be empty, which is what the clear function accomplishes. A procedure that does not appear in the copayment coverage table is not covered (patient is responsible for the full amount).

2019 ADA Claim Form

Dentrix Ascend prints claims using the 2012 ADA claim form by default. With this update, you can comply with a carrier request to print the 2019 ADA claim form and avoid delays or denials from that specific carrier. There is no change to electronic claims, which the ASC X12 Standards for Electronic Data Interchange regulates.

To indicate that you want to print a claim using the 2019 version of the form, open the carrier record (**Home > Carriers**) to see the new **Claim Form Options** section. Click the **Printed claim format** dropdown to select American Dental Association, 2019 version, as needed.

Claim Form Options

Printed claim format

American Dental Association, 2012 version

American Dental Association, 2012 version

American Dental Association, 2019 version

The Audit Log tracks changes to this configuration.

Scheduling

Complete All Appointment Procedures with a Single Click

To make the patient checkout process more efficient, a new **Complete All** button in the patient's routing panel appointment card allows you to quickly post or complete all the procedures in the appointment.

The screenshot shows a patient appointment card for Joel Brennan, dated 05/23/1998 (22). The appointment is scheduled for 12:30 PM, 50 minutes, in the LAUR room, at the Chair. The status is Checkout. The patient's medical alerts are listed as "No conditions". The appointment note field is empty. Below the note field is a table of procedures:

Th	Surfaces	Code	Description	Status
		D0120	Periodic Evaluation	Post
		D1110	Prophylaxis - Adult	Post
		D1351	Sealant	Post
		D1351	Sealant	Post
		D1351	Sealant	Post
		D1351	Sealant	Post

Below the table are checkboxes for "Needs Follow-up" and "Premedicate", and a highlighted "Complete All" button. At the bottom, there are buttons for "Chart", "Perio", and "Tx Planner", and a "Schedule Recare (1)" section with an "Add New Recare" button.

The button appears once the appointment card makes it to the Chair, Checkout, or Complete status in the routing panel.

The name of a procedure's **Status** button is **Post** when the procedure is added to the appointment without being treatment-planned, and **Complete** when the procedure is treatment-planned.

One of two things happen when you click **Complete All**:

- All treatment-planned procedures and any posted procedures not requiring a tooth number or surface (for example, a prophy) change to the Completed status.
- A **Bulk Edit Procedure** wizard opens to guide you through inputting any required tooth number or surface information for posted procedures.

The **Bulk Edit Procedure** wizard includes a tab for each procedure requiring additional information. Navigate to each procedure either by clicking the procedure number at the top or by clicking the **Back** or **Next** buttons at the bottom of the window.

The screenshot shows the 'Bulk Edit Procedure (+)' window. At the top, a navigation bar contains 'Procedures' followed by four tabs labeled 'D1351'. The first 'D1351' tab is highlighted in blue, and a mouse cursor is pointing at it. Below the navigation bar, the form fields are: Date: 06/04/2020; Provider: LAUR - Lauren Hejazi; Status: Completed; Procedure: D1351 - Sealant; Bill to insurance: On; Amount: 70.00; Tooth: 2; Note: Please add a note here. On the right side, there is a 'General Information' sidebar with sections for 'Start/Completion Date' and 'Insurance Estimate'. At the bottom, there are four buttons: 'Complete All', 'Cancel', 'Back', and 'Next'. The 'Back' and 'Next' buttons are highlighted with red boxes.

After you enter the required information, a green highlight appears on the navigation panel under the procedure number.

Once you satisfy all the requirements for each of the procedures, the **Complete All** button becomes available.

The screenshot shows the 'Bulk Edit Procedure (+)' window after the first procedure is completed. The navigation bar now shows four 'D1351' tabs, with the fourth tab highlighted in blue. The form fields are: Date: 06/04/2020; Provider: LAUR - Lauren Hejazi; Status: Completed; Procedure: D1351 - Sealant; Bill to insurance: On; Amount: 70.00; Tooth: 18; Note: Please add a note here. The 'Complete All' button at the bottom left is now highlighted in blue and has a mouse cursor over it. The 'Back' and 'Next' buttons are still present but are no longer highlighted.

When you click **Complete All**, the status becomes Completed for each procedure.

The screenshot shows a patient chart for Joel Brennan, dated 05/23/1998 (22). The chart includes a 'Medical Alerts: No conditions' section and a table of procedures. The table has columns for 'Th', 'Surfaces', 'Code', 'Description', and 'Status'. The 'Status' column for all listed procedures is 'Completed'. The 'Th' column has values 2, 3, 14, and 18. The 'Description' column lists 'Periodic Evaluation', 'Prophylaxis - Adult', and 'Sealant' (repeated for three rows).

Th	Surfaces	Code	Description	Status
		D0120	Periodic Evaluation	Completed
		D1110	Prophylaxis - Adult	Completed
2		D1351	Sealant	Completed
3		D1351	Sealant	Completed
14		D1351	Sealant	Completed
18		D1351	Sealant	Completed

Completed procedures automatically post to the Ledger.

Clinical

Show Perio Exams in Progress Notes

This update adds perio exam visibility to the Progress Notes tab and to the progress notes section of the Chart chairside dashboard.

Date	Th	Surfaces	Code	Description	Status	Provider ...
06/03/2019				Periodontal Exam	Perio Exam	RDHCB

The Progress Notes tab has a new **Perio Exam** checkbox to help you filter the patient's notes for perio exams; and if you have an uncompleted exam, a new **Resume** button reopens the exam from within the notes. Clicking the line item opens any perio exam.

The screenshot shows a progress notes interface with a 'Filters' sidebar on the left. The sidebar has a 'Perio Exam' checkbox checked. The main area shows a table with columns for 'Date', 'Th', 'Surface...', 'Code', 'Description', 'Status', 'Provide...', and 'Amount'. A row is visible for '06/10/2020' with 'Periodontal Exam' as the description, 'Perio Exam' as the status, and 'DRTB' as the provider. A 'Resume' button is highlighted in a red box next to the provider name.

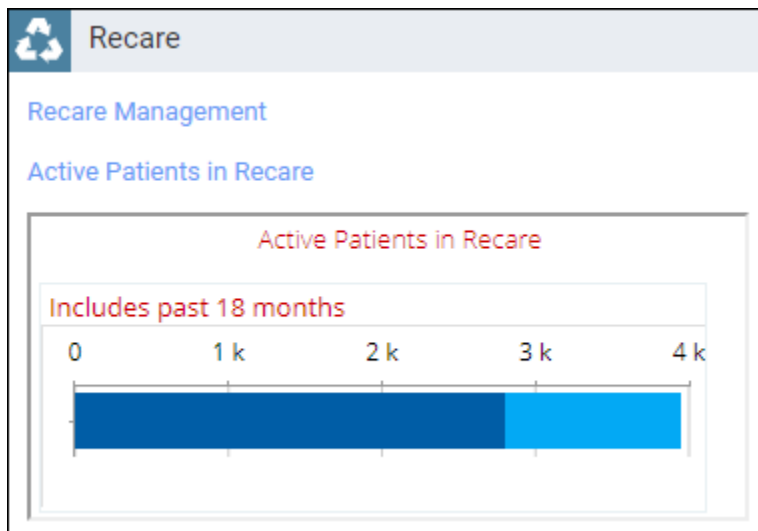
Date	Th	Surface...	Code	Description	Status	Provide...	Amount
06/10/2020				Periodontal Exam	Perio Exam	DRTB	Resume

Reporting

Insights Dashboard Enhancements

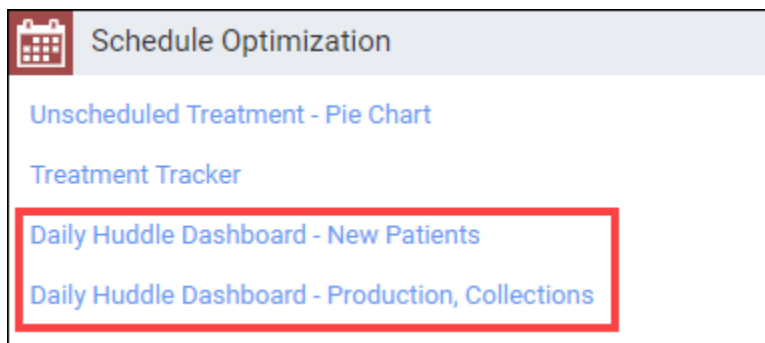
Some practices define patient retention as the percentage of active patients who consistently return for recare visits within a specified period. Want to keep an eye on your numbers? The Insights Dashboard has a couple enhancements, one of which specifically targets active patients in recare. To see the enhancements, open the Insights dashboard (**Home > Insights**).

The Recare section has a new bar chart giving you a snapshot of active patients in recare. Note this graphic only includes patients assigned to prophies and not perio. The timeframe is 18 months. As a rough gauge, you can see at a glance the total number of active patients and the percentage in recare for the current location. Hover over the color bars to see the numbers.



For a more detailed report, or to see data for the entire organization, click the associated **Active Patients in Recare** link to open the Active Patient in Recare power report, which you can edit to get the report you want.

The second enhancement is two links to the Daily Huddle dashboards from the Schedule Optimization section.



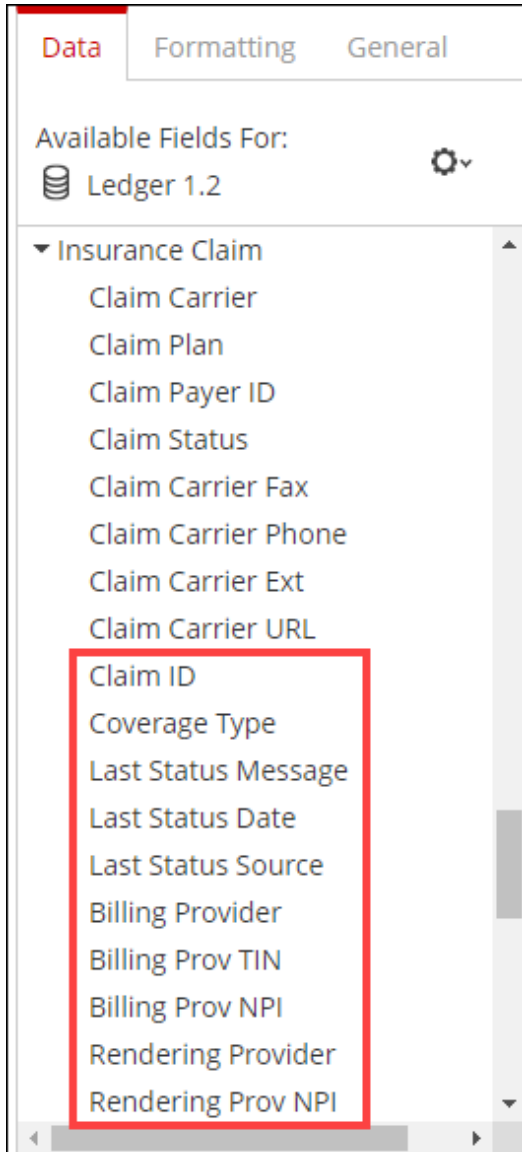
New within the production and collection daily huddle dashboard, the Scheduled Production – Today and Scheduled Production – Remaining Month reports solely measure gross estimated production. Net production is not yet available for these reports (which you can see in the Production Totals report in the Calendar).

Scheduled Production - Today			
> 2 Filters		Rows: 3 Cols: 1	Actions ▼
Location	Specialty	Scheduled Gross Production	
Strong Smiles ...	Dental Public Heal...	\$2,998.00	
	Dentist	\$0.00	
	Hygienist	\$484.00	
Strong Smiles EDGEWATER Total		\$3,482.00	

Power Reporting

Additional Claim Fields in Power Reporting

Give your revenue cycle management a boost by better identifying claims and providers in those claims. Create Ledger reports that associate transactions to unique claims, claims by rendering providers with their NPI scores, and claims by billing providers and their TINs by utilizing a new set of data fields added to the **Insurance Claim** section of the Interactive Ledger Report Builder.



- The **Claim ID** is a large number used internally to the database and does not display on any page. As a unique identifier, it can be useful in creating claim histories.
- The **Coverage Type** refers to primary, secondary, and so on out to 10 levels.
- The **Last Status** fields show which user last touched the record, and when, and any notes they entered.
- The remaining field names should be self-explanatory.

No new report was prebuilt to make use of these fields.

User Rights

No changes to user rights are included in this release.

New Learning Content

Dentrix Ascend includes an extensive library of learning materials, freely available to every member of your practice at any time. Below is a sample of both new and popular topics.

[Appointment Colors](#)

The Calendar include colors and icons that give you appointment information at a glance. You have the option to color your appointments two ways: by provider, or by procedure.

[Checking Text Message Responses](#)

At the beginning of the day, one of the first things you need to do is check your patient messages to see if a patient canceled an appointment.

[Validating Appointments Booked Online](#)

It's a new day, and one of your many tasks is to ensure that all overnight online appointment bookings are correctly assigned to your patient's records.

[Adding Insurance Carriers and Plans](#)

From Dentrix Ascend, you have access to a large database of supported payers that is updated regularly for your convenience.

[The NEW Normal in the Dental Office \(COVID-19 Ideas\)](#)

We're facing a new world with new challenges. We all need to be educated on new guidelines and procedures for dental offices to best use Dentrix Ascend to implement these changes.