

DENTRIX ASCEND

Release Notes: March 10, 2020 (Prod 351)

The product update released on March 10, 2020, introduces the first phase of clinical note template central management, with the ability to distribute from one location to many. You can now receive an automatic warning when the patient's primary insurance plan has no contract with your billing provider. Online booking time slots now show all available appointment times at once. And this update brings phase 3 of lab case management, which includes a new dashboard widget and a new power report.

Clinical Note Template Distribution

If your dental group practice wants to share standardized clinical note templates among all offices, this update introduces that capability. For example, if you've done the work of customizing a popular template, you can now share it with any location without having to build from scratch in each location or requiring each provider to log in and make it a favorite. This new distribution feature is located in the **Settings > Clinical Note Templates** page.



To distribute clinical note templates, begin by selecting the template names from the **Categories** lists. You can include entire categories or just a few templates within a category. When you are ready, click **Distribute**. This opens a **Distribute Selected Templates** dialog box.

Distribute Selected Templates [X]

Steps: Select Locations

Destination location(s)

All locations

Anderson Family Dental of Santa Ana CA

Clear all existing templates & replace with those that are checked

Distribute [Cancel]

Select **All locations** to send these templates to all the locations in your organization, or you can select specific locations. **IMPORTANT:** your user account must have rights to each of these locations; in other words, the destination location list is limited to the locations to which you have access.

The **Clear all existing templates & replace with those that are checked** option means the templates in the destination location(s) will be *completely removed*, and those locations will have only the templates selected here for distribution. A common use for this feature is when you are adding a brand new location and there is nothing there but the standard—and for you, *outdated*—set of templates.

If you do *not* select this option, the dialog box will warn you when a duplicate template name exists, and give you the option to replace, skip copying, or to keep both versions.

Distribute Selected Templates [X]

Steps: Select Locations [Template Conflicts]

Warning. 1 template(s) have a conflict with one or more locations you selected.

Select what to do with the template(s)

Skip templates with the same name.
Templates with the same name won't be copied.

Keep both templates.
Conflicting templates you are copying will be renamed as "Template Name (1)".

Replace templates with the same name.
Templates from this location will replace templates with the same name in destination location(s).

Clear all existing templates & replace with those that are checked.
Selected templates from this location will completely replace all templates in destination location(s).

[Back] **Distribute** [Cancel]

The same choices show up for any conflicting quick-picks associated with the templates. Conflicts may be common especially with bulk distribution because every location starts with the same default list of templates. If all you are distributing are new custom templates, conflicts are less likely.

To perform clinical note template distribution, your user role must include both the existing **Manage clinical note templates** right and the new **Distribute Clinical Note Templates** right (**Settings** category). Users in the Administrator role have these enabled automatically; any other role requires manual enablement by an administrator.

Note that if a provider is working on a clinical note from a destination template when you attempt to replace that template, you will receive a warning message, and distribution will skip that template.

The Audit Log tracks distribution activity.

Lab Tracking Phase 3

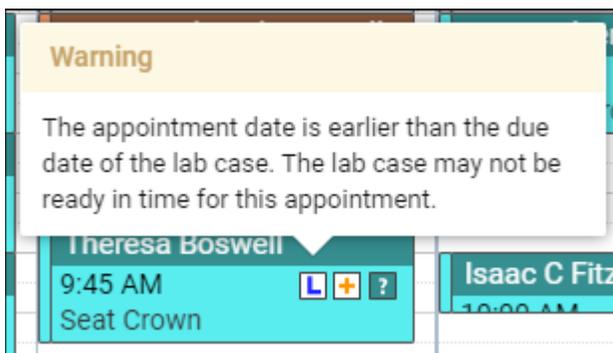
Lab Cases Widget

The home page/dashboard has a new widget called **Outstanding Lab Cases**. It provides an immediate link to the Lab Cases page and gives you a heads up for how many lab cases you are waiting to receive.



Due Date Warning

In support of lab case due dates—the date when the lab work is expected to return—you will now see a warning pop-up in the Calendar if you attempt to reschedule an appointment to a date before the lab work is due.



Lab Cases Power Report

To support the lab cases feature, a new Power Report called Lab Case – Appointments is now available. It is located in the **Schedule/Recare** category.

Power Reporting > Lab Case - Appointments ★

Available fields (59) for: Schedule

Find: View ▾

Layout

Rows

- Appt Date ▾
- Appt Time ▾
- Patient ▾
- Lab Due Date ▾
- Lab Status ▾
- Dental Lab ▾
- Lab Phone ▾
- Notes ▾
- Proc Desc ▾

Drop Level Here

Columns

2 Filters

- ✕ Lab Due Date includes yesterday, today and next 7 Lab Due Date
- ✕ Lab Status includes Outstanding and Received

Appt Date	Appt Time	Patient	Lab Due ...	Lab Status
2020-02-11	11:00 AM	Brown, Brand...	02/12/2020	Outstanding
2020-02-12	10:00 AM	Green, Aaron	02/13/2020	Outstanding
2020-02-13	09:50 AM	Dixon, Ching	02/14/2020	Outstanding
2020-02-14	11:00 AM	Black, Alma	02/15/2020	Received
		Gray, Joyce	02/15/2020	Outstanding
Grand Total				

Insurance

Warning when Billing Provider is Not Contracted

Dentrix Ascend can now warn you automatically when the billing provider is not contracted with the patient's primary insurance plan.

Insurance Information

Add Plan

Coverage Type	Carrier	Plan/Employer (Group #)
Primary	 The Loomis Company- TPA	8777D90F968842 (B41)

The warning triangle pops up an explanation when you click it.

Coverage Type	Carrier	Plan/Employer (Group #)
Primary	 The Loomis Company- TPA	8777D90F968842 (B41)

Edit Plan: The Loomis Company- TPA 8777D90F968842

Subscriber Info

Subscriber *
 Joseph Helms

Subscriber ID # *
 0876D4147

Carrier: The Loomis Company- TPA 

Payer ID: 23223

Plan: 8777D90F968842 (B41)

[Coverage Table](#) [Benefits](#)

Warning

The Billing Provider (DMD1 - Steven Smith) is not contracted with this patient's primary insurance plan.

The warning also appears in the patient's appointment panel.

 **Joseph Helms** 
 03/28/1969 (50 years old)

[Chart](#) [Ledger](#) [Tx Planner](#)

[Appt](#) [Contact Info](#) [Rel. Appts](#) [Med. Alerts](#) [Lab Case](#)

Your settings in the **Insurance Defaults** page determine who the billing provider is. This warning feature is optional and you can turn it off or on with a new switcher in the **Billing Provider** section of the page. The feature is turned Off by default.

Insurance Defaults

Billing Provider

Specific Provider Steven Smith

Provider of Procedures

Warn when scheduling an appointment if Billing Provider is not contracted with the patient's primary insurance plan On

Outstanding Claims Subscriber Link

In addition to the patient name hyperlink, the Outstanding Claims report (**Home > Outstanding Claims**) now includes name hyperlinks to the insurance subscriber. Clicking the name opens the subscriber's Ledger page in a new tab. The advantage of this is that when you're done looking at the subscriber's ledger, you can close the tab and go back to the Outstanding Claims report without needing to regenerate the report.

Date	Insurance Carrier	Group Plan	Subscriber	Subscriber #	Patient	Aging	Billed
10/08/20...	Dental Select Phone (800) 555-2020	C17284F87AF04F8... Phone (801) 555-30...	Henry McNamara 01/27/1968 (34)	008275	Margaret McNamara 07/01/1966 (53)	over 60	140.00
10/08/20...	The Loomis Company- Phone (800) 367-37...	8777D90F968842 Phone (800) 367-37...	Joseph Helms 03/28/1969 (50)	000100204	Tessa Hickens 12/29/1993 (26)	over 60	192.00
10/07/20...	Dental Select Phone (800) 555-2020	9E94FDAA Phone (801) 495-30...	Michaun Buleppo 10/21/1988 (31)	868253	Michaun Buleppo 10/21/1988 (31)	over 60	405.00

Insurance Adjustment Description Update

To make insurance payment adjustment descriptions easier to understand, the names of the dropdown options have been renamed from "Write-Off" to "Write-Off (-)" and from "Refund" to "Offsetting (+)".

Balance	Insur. Portion	Write-Off	Patient Portion
100.60	- 33.60	- 52.00	= 15.00

Insurance Adjustment	Adjustment Type	Amount
Write-off (-)	Insurance Adjustment	\$ 52.00
None		
Write-off (-)		
Offsetting (+)		

Submitting Automated Eligibility Checks

The **Location Information** page (under **Settings**) has a new option that allows you to turn off automated eligibility checking. For each location, you can choose whether the automated inquiry runs each morning. To keep the checks going as they have been for some time now, keep the **Batch Job for Insurance Eligibility** switcher set to Yes. This is the default setting. For more information about the automatic insurance eligibility feature, see [Verifying eligibility statuses](#) in the Resource Center.

Accounting Information

Preferred fee schedule * Local tax *

SoJoDental fees 7.1 % E.g. \$100 * 7.1% = \$7.1

Require reasons for incomplete appointment tasks Yes Available Procedures

Local timezone *

America/Denver MST - Mountain Standard Time (UTC-07:00)

Batch Job for Insurance Eligibility Yes

Scheduling

Online Booking Multi-Slot Display Enhancement

With this update, when you create a time block for online booking, Dentrix Ascend can present all of the slots available in that block to the patient at the same time. Previously, the patient could only select the first slot available, and when that filled, the next patient would see the next slot, and so on. We hope this increased flexibility improves the patient experience and increases online booking participation.

Schedule appointment

Patient type

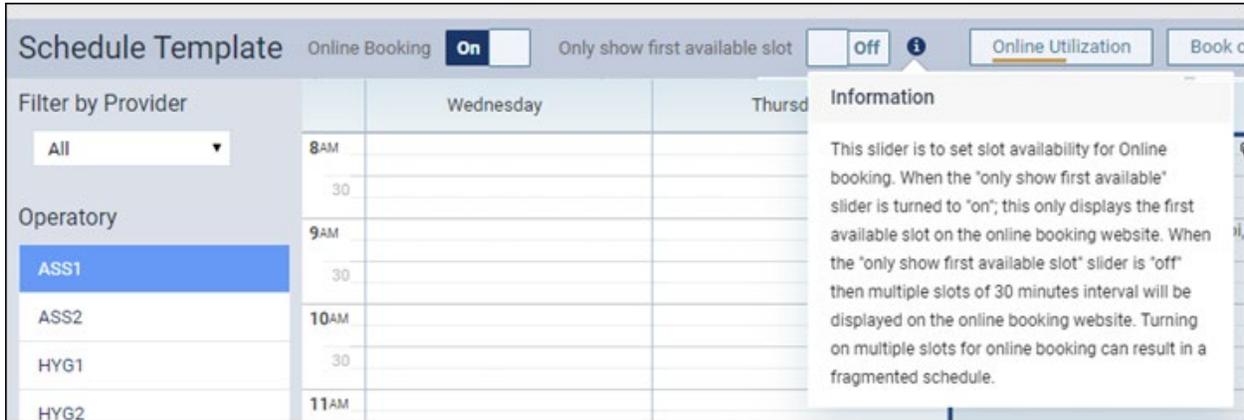
Reason

Provider

Tue Feb 18	Wed Feb 19	
1:00 pm	-	
1:30 pm	-	
2:00 pm	-	
2:30 pm	-	
3:00 pm	-	

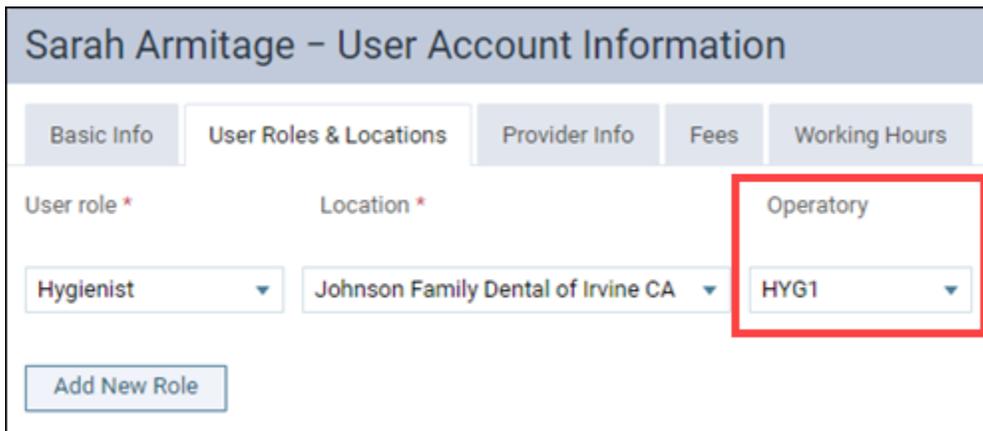
The appointment reason determines the appointment times presented to the patient; you can assign different appointment lengths to different appointment reasons.

If you prefer to retain the original functionality, you may turn that back on using the new **Only show first available slot** switcher in the Schedule Template page.

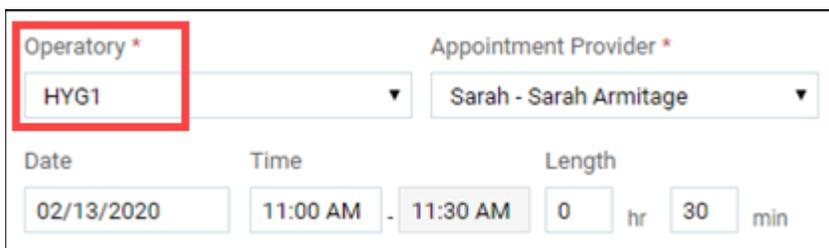


Provider Default Operatory

To make scheduling more efficient, you now can assign a default operatory to a provider.



The effect of this is, when you view the Calendar by provider (**Provider View**) and click to create an appointment, the operatory automatically fills in when you select the provider.

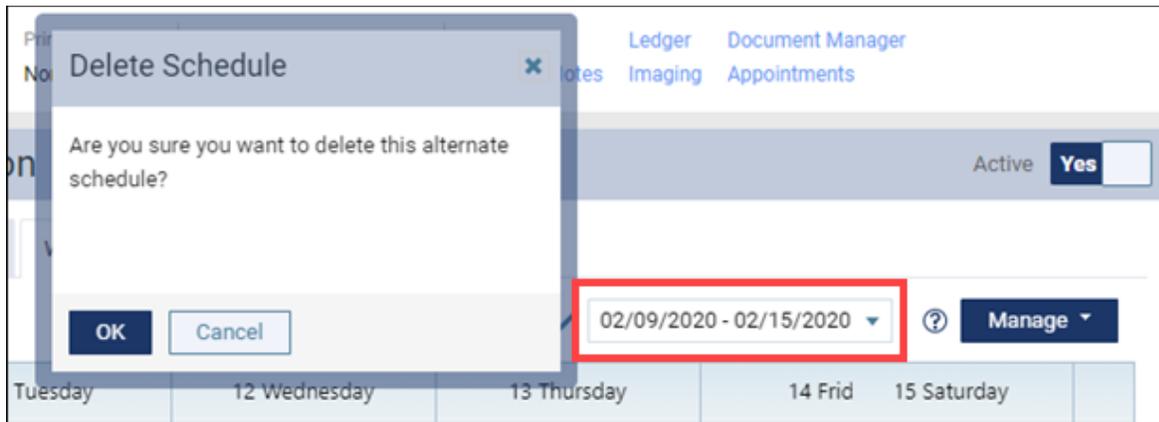


If you change the provider, the operatory changes automatically. You can change the operatory as needed after selecting the provider.

This is an optional feature. Assigning a default operator is not required to set up a provider user account.

Provider Working Hours Enhancement

The ability to create alternate work hours for a provider, for a specific date range, was introduced a couple of releases ago. New to this release is the ability to delete the alternate schedule configuration. To do this, open the provider's **Working Hours** tab (**Settings > User Accounts**), select the configured date range from the dropdown, and click the **Delete** button in the lower right corner of the page. A pop-up window will ask you to confirm the deletion.

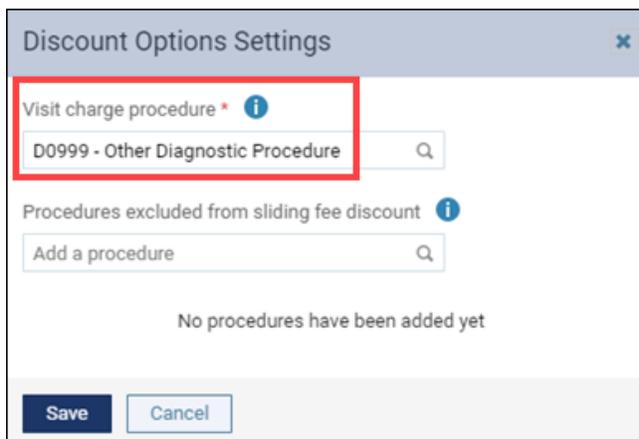


Billing

Per-visit Charge for Sliding Fee Program

As an additional enhancement for practices participating in an income-based sliding fee discount program, Dentrix Ascend now can charge a flat per-visit fee, regardless of the procedures performed during the visit.

To enable per-visit fees, open the **Discount Options** page (under the **Settings** menu). Click the **Settings** button to open the **Discount Options Settings** window. In the **Visit charge procedure** field, designate a procedure code to represent the visit charge. You can choose any whole-mouth procedure. For this example, we are using D0999 "Other Diagnostic Procedure".



Next, edit the Discount Fee Scale and set the **Patient Pays** method to "\$ per visit". Type in the charge amount and click **Save**.

8		43,430	86,860.00
Each ADDL		4,420	8,840.00
Patient Pays	45.00	\$	100.00 %
			100.00 %
			Per procedure
			Per procedure
			\$ per procedure
			\$ per visit

Once you configure a per-visit charge, patients assigned to a sliding fee will have a message in their **Patient Information** page that reflects this discount arrangement, assuming that they fall within the column guidelines. For more information on configuring the Discount Fee Scale, see [Setting up a sliding fee scale](#) in the Resource Center.

Primary Provider: DMD1 - Steven Smith

Discount Plan: Sliding fees

Family size: 4

Annual family income: \$ 10,000

Poverty level: 38.83%

Patient pays: **\$45.00** Per visit

To apply this per-visit feature, after completing today's procedures you must use a new **Discount** tab in the **Patient Walkout** window (and your user role must have the **Edit patient procedure amount** right). When you first open the patient's Ledger, you will see the regular charge amounts for the procedures completed today. Click the **Patient Walkout** button to open the **Patient Walkout** window.

Ledger

Guarantor statement: All history

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment Patient Walkout

Unapplied Credits: 0.00

0 - 30: +89.00

31 - 60: +0.00

61 - 90: +0.00

91+: +0.00

Balance: 89.00

Insurance Portion: 0.00

Write-Off Adjustment: 0.00

Patient Portion: 89.00

Balance: \$89.00

Date	Patient	Code	Description	Provider	Amount	Running Balance
02/17/2020			Balance Forward			0.00
02/17/2020	Joseph Helms	D2140	Amalgam 1 Surface Th: 13(D)	DMD1	89.00	89.00

Patient Walkout

Discount Create Claims Send Claims Payment Statement

Information. The patient(s) below qualifies for a per-visit sliding fee program. Specify the visit charge procedure that will be posted with the dis

▼ Helms, Joseph Visit charge provider: DMD1 - Steven Smith Service date: 02/17/2020

Th	Surfaces	Code	Description	Provider	Amount
<input checked="" type="checkbox"/>	13	D	D2140 Amalgam 1 Surface	DMD1	89.00

Visit charge \$45.00 Total amount \$89.00

Post Discount Close

In the **Discount** tab, select the procedures to include in the visit, and set the **Visit charge provider** if different from the rendering provider. When you're ready, click **Post Discount**. The visit details disappear. Click **Close** to close the window and return to the Ledger.

Ledger Guarantor statement: All history View

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment Patient Walkout

Unapplied Credits	0 - 30	31 - 60	61 - 90	91+	Balance	Insurance Portion	Write-Off Adjustment	Patient Portion
0.00	+45.00	+0.00	+0.00	+0.00	= 45.00	0.00	- 0.00	= 45.00

Balance : \$45.00

Date	Patient	Code	Description	Provider	Amount	Running Balance
02/17/2020			Balance Forward			0.00
02/17/2020	Joseph Helms	D2140	Amalgam 1 Surface Th: 13(D)	DMD1	89.00	
02/17/2020	Joseph Helms	D0999	Other Diagnostic Procedure	DMD1	45.00	134.00
02/17/2020	Joseph Helms	Adj	Discount \$89.00		-89.00	45.00

Returning to the Ledger, you will see two things: the addition of the per-visit procedure code, and an adjustment that sets the total amount of the visit to the per-visit charge.

Note that **Production Totals** in the Calendar uses the per-visit fee to calculate the **Net** production.

Reporting

Aged Receivables Enhancement

The Aged Receivables report has a new **Skip accounts with claim pending** filter. When the checkbox is marked, the report will not include accounts with claims pending.

Related to this, a new **CP** (claims pending) column was added to the report. When you choose to include accounts with claims pending, the **CP** column displays a count of how many claims are pending for each guarantor. A blank means no claims are pending. The claims pending counts are as of the time you run the report.

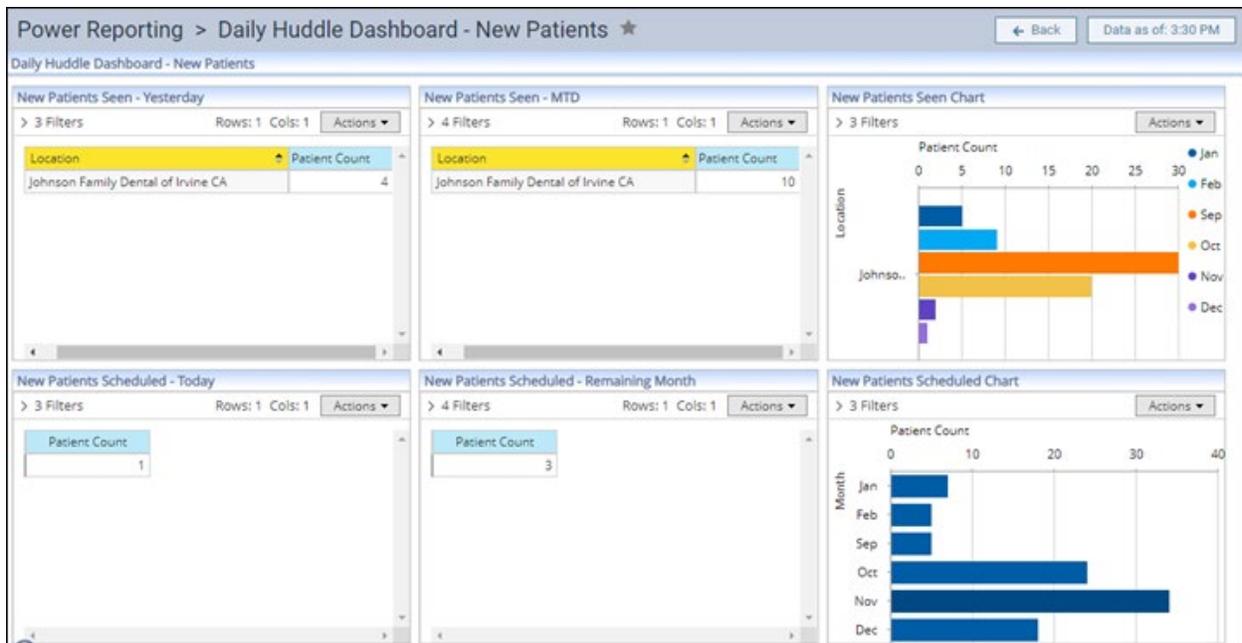
Primary Guarantor	Phone Number	Last Payment	CP	Unapplied Credits	0-30	31-60	61-90	Over 90	Balance
Abbott, Beth		50.00 on 11/19/2019		-163.75	0.00	0.00	129.00	40.00	5.25
Abbott, Elisabeth		10.00 on 03/20/2017		0.00	0.00	0.00	0.00	97.00	97.00
Abbott, Joan		339.50 on 07/19/2017		-21.00	0.00	0.00	0.00	0.00	-21.00
Abbott, Olivia		100.00 on 12/05/2019		-100.00	0.00	0.00	0.00	0.00	-100.00
Abbott, Vernon		15.00 on 09/29/2014		0.00	0.00	0.00	39.00	0.00	39.00
Adams, Annette		20.00 on 01/27/2020	1	0.00	180.00	0.00	0.00	0.00	180.00
Adams, Eric		368.00 on 11/08/2018		-153.20	0.00	0.00	0.00	0.00	-153.20
Adams, Melissa J		58.40 on 02/11/2020	1	0.00	0.00	0.00	0.00	463.20	463.20

Power Reporting

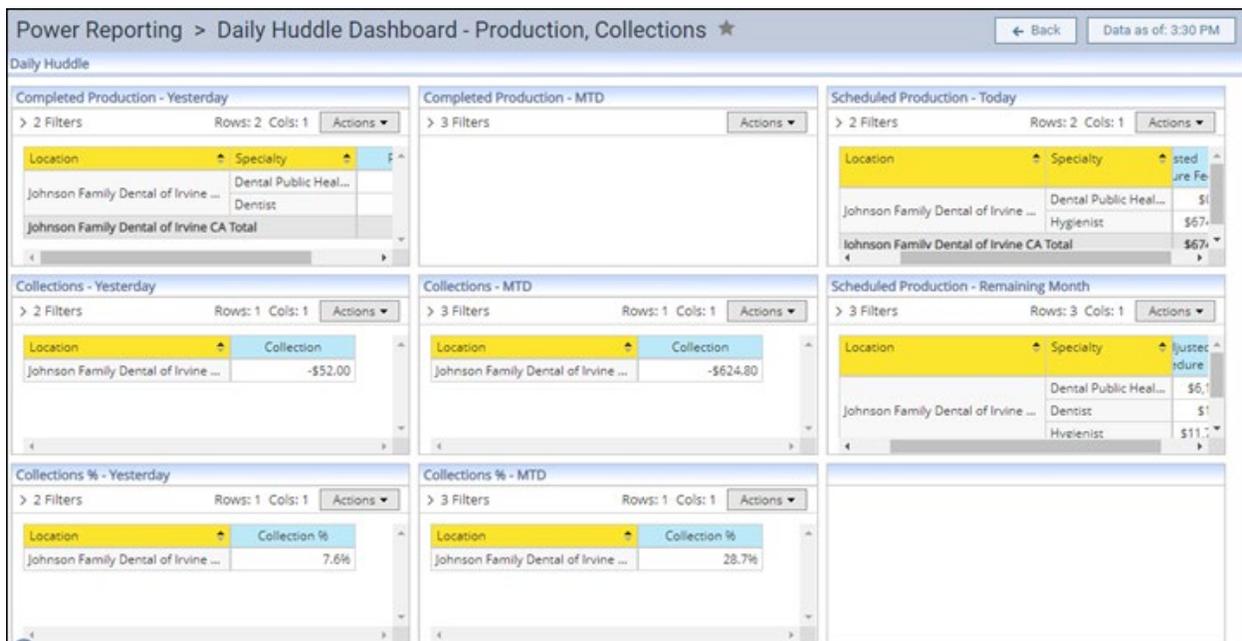
Daily Huddle Dashboards

Two new “daily huddle” dashboards are now included in the Power Reporting suite. As you know, the purpose of a daily huddle is to get a snapshot of how things went yesterday in terms of production, collections, new patients, and scheduling. These two dashboards represent phase one of Dentrix Ascend’s daily huddle implementation.

In Power Reporting, a dashboard is a collection of several pre-configured reports. The Daily Huddle Dashboard – New Patients report focuses entirely on your new patients, with the ability to see numbers for yesterday, today, the rest of the month, and so on.



The Daily Huddle Dashboard – Production, Collections report, as the name implies, summarizes production and collection numbers for yesterday and the month to date, looks at today’s scheduled production, and forecasts production for the remainder of the month.



The individual reports within the dashboards is exportable to PDF or Excel. You can remove but not edit the pre-configured filters. You can convert tables to graphic charts and vice versa.

Each of the reports within dashboards also exists as standalone report within the Power Reporting module, and you can edit and save new versions of those reports for yourself or your organization. To find them, type “DH” in the Power Reporting search field.

Power Reporting Data as of: 3:45 PM

Search Results for "dh"

Search: 🔍

- All Reports
- My Reports
- Organization Reports
- Auditing

DH Collection % - MTD	DH Collection % - Yesterday	DH Collections - MTD	DH Collections - Yesterday
DH Completed Production - MTD	DH Completed Production - Yesterday	DH New Patients Scheduled - Remaining Month	DH New Patients Scheduled - Today

At this time, the daily huddle reports are not under any category and just live in the All Reports section.

New Lab Cases Report Added

To support the lab cases feature, which has rolled out over the last three releases, new to Power Reporting is a default report called Lab Case - Appointments, located in the **Schedule/Recare** category.

Power Reporting > Lab Case - Appointments ★

Available fields (59) for: Schedule

Find: View

- Lab Cases
 - Dental Lab
 - Dental Lab Phone
 - Lab Case Status
 - Lab Case Note
 - Lab Due Date
- Lab Due Date (YMD)
 - Due Date Year
 - Due Date Month
 - Due Date Day

Layout

Rows

- Appt Date
- Appt Time
- Patient
- Lab Due Date
- Lab Status
- Dental Lab
- Lab Phone
- Notes
- Proc Desc

Drop Level Here

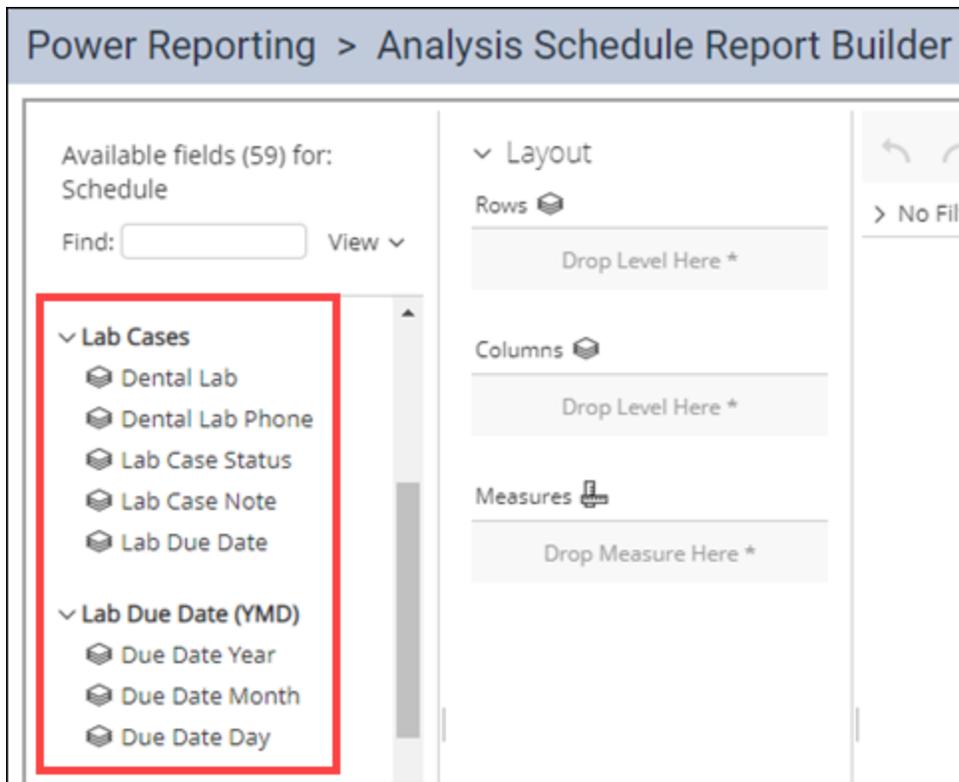
Columns

2 Filters

- Lab Due Date includes yesterday, today and next 7 Lab Due Date
- Lab Status includes Outstanding and Received

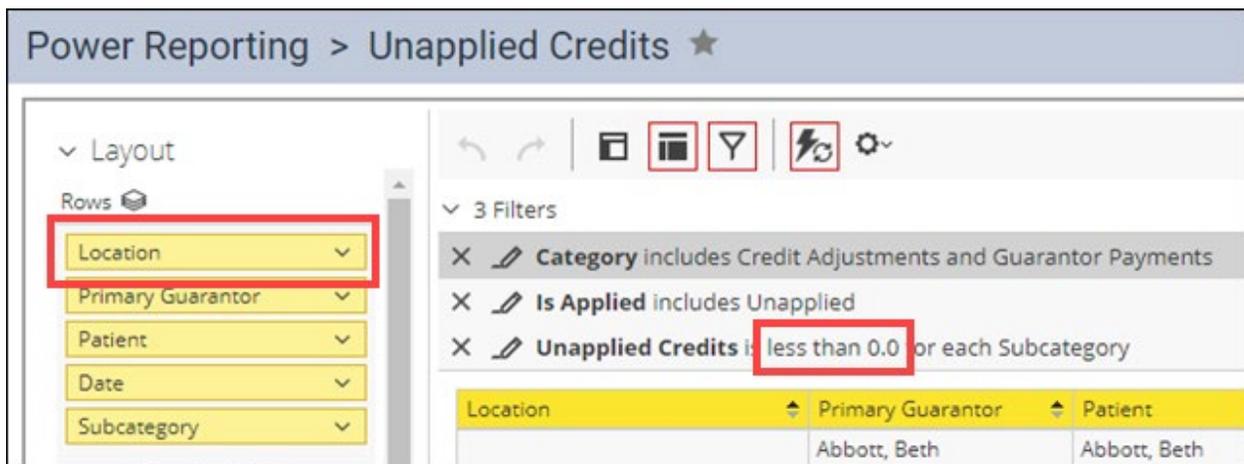
Appt Date	Appt Time	Patient	Lab Due ...	Lab Status
2020-02-11	11:00 AM	Brown, Brand...	02/12/2020	Outstanding
2020-02-12	10:00 AM	Green, Aaron	02/13/2020	Outstanding
2020-02-13	09:50 AM	Dixon, Ching	02/14/2020	Outstanding
2020-02-14	11:00 AM	Black, Alma	02/15/2020	Received
		Gray, Joyce	02/15/2020	Outstanding
Grand Total				

Additionally, the Analysis Schedule Report Builder now includes **Lab Cases** data fields for your custom-built reports.



Unapplied Credit Report Redesigned

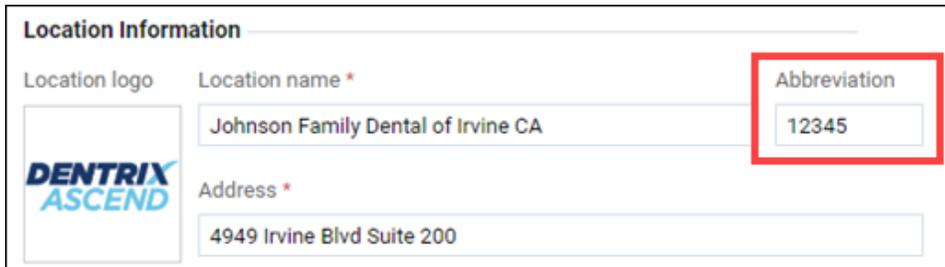
Based on your feedback, the Unapplied Credit Report has a new set of default filters. We added a **Location** field and now include all unapplied credit amounts.



Usability

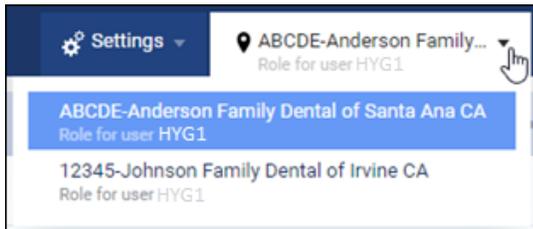
Location Abbreviation Code Expanded to Five Characters

The new **Abbreviation** field in the Location Information page, introduced in the last release, has expanded to allow a prefix of up to five characters to the location name.



The screenshot shows the 'Location Information' form. It includes fields for 'Location logo' (with the DENTRIX ASCEND logo), 'Location name *' (containing 'Johnson Family Dental of Irvine CA'), 'Address *' (containing '4949 Irvine Blvd Suite 200'), and 'Abbreviation' (containing '12345'). The 'Abbreviation' field is highlighted with a red border.

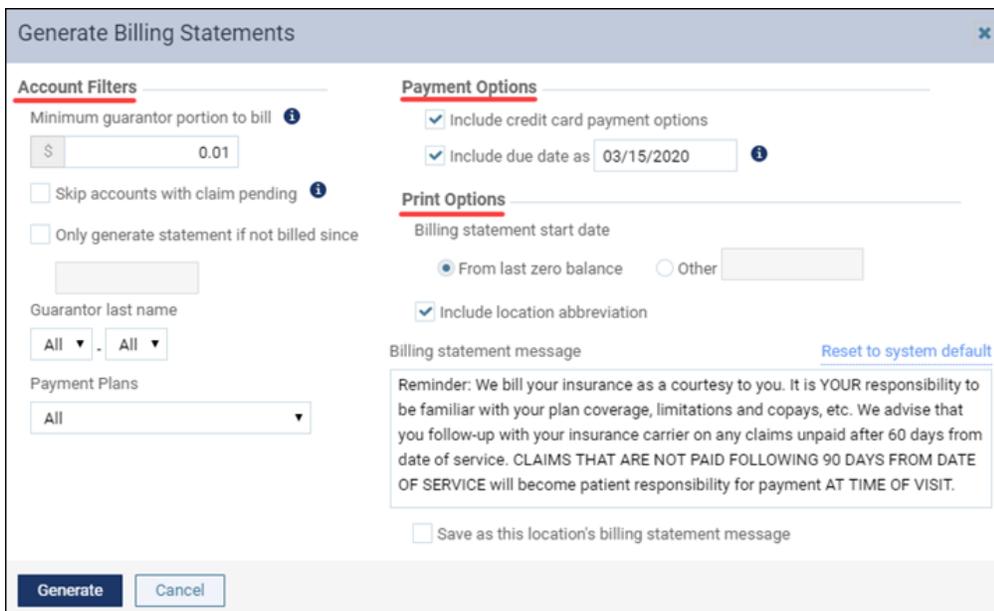
As before, the abbreviation shows up in the location selector, and optionally in your walkout and billing statements.



The screenshot shows a location selector dropdown menu. The selected item is 'ABCDE-Anderson Family...' with the role 'Role for user HYG1'. The dropdown list shows three options: 'ABCDE-Anderson Family Dental of Santa Ana CA', '12345-Johnson Family Dental of Irvine CA', and another 'ABCDE-Anderson Family...' entry. The expanded abbreviation '12345' is visible in the second option.

Generate Billing Statements Interface Update

This release introduces some improvements to the organization and field naming in the **Generate Billing Statements** window in the **Billing Statements** page.



The screenshot shows the 'Generate Billing Statements' window. It is divided into several sections: 'Account Filters' (with fields for 'Minimum guarantor portion to bill' and 'Skip accounts with claim pending'), 'Payment Options' (with checkboxes for 'Include credit card payment options' and 'Include due date as'), 'Print Options' (with radio buttons for 'Billing statement start date' and a checkbox for 'Include location abbreviation'), and a 'Billing statement message' section with a text area and a 'Save as this location's billing statement message' checkbox. The window has 'Generate' and 'Cancel' buttons at the bottom.

User Rights

The following changes to user rights are included in this release:

- **Distribute clinical note templates** (in the **Settings** category) allows the user to copy selected clinical note templates from the current location to other locations in a multi-site practice.

Imaging

This release includes several new Imaging features and improvements to existing features. New features include:

- Direct integration with the Dexis DEXcam4 HD camera
- Direct integration with the Dexis CariVu camera

New Learning Content

Have you visited the Resource Center lately? We add or update topics all the time. Here is a sampling of what's new:

[Sending Electronic Statements](#)

The simplest and most inexpensive way to transmit your patients' billing statements is to send them electronically.

[Collecting Missing Contact Information](#)

Automated appointment reminders are the most efficient way to reduce patient no-shows and retain patients.

[Adding Procedure-Specific Treatment Consent Messages](#)

One of the best ways dentists can protect themselves is by ensuring patients are armed with the facts needed to make informed decisions, and the best place to provide this information is in a treatment consent form.

[Scheduling Recare from the Routing Panel](#)

Unless a consistent workflow is established or a reminder system is in place, it can be difficult to remember to schedule a patient's next recare appointment. Dentrrix Ascend has a solution!

[Checking Insurance Eligibility](#)

In the ever-changing world of dental insurance, keeping track of patient insurance can be a full-time job. Fortunately, Dentrrix Ascend makes it easy to verify insurance eligibility in just a few clicks.

[Attaching Lab Cases to Appointments](#)

Did you ever have a patient show up for an appointment, only to discover that the lab case hasn't arrived from the lab yet? Dentrrix Ascend helps you avoid this awkward situation.