

DENTRIX ASCEND

Release Notes: February 14, 2023 (Beta 405)

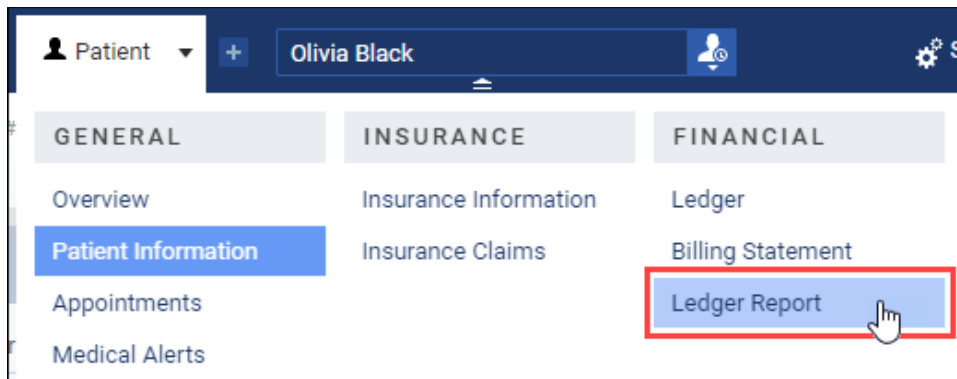
This release introduces a new Ledger report that allows you to give patients a report for a specific time frame, like last year's procedures and payments. You can now use Dentrix Ascend Pay to process bulk insurance payments using an insurance carrier credit card. There are also enhancements to the merge carriers feature and the Clinical Note Tasks Report.

Patient Information

Ledger Report

You may sometimes, especially at the beginning of a new year, get requests from patients for a ledger-based report listing the procedures completed and payments made during a specific time frame, for example the previous year. With this update, Dentrix Ascend now provides just such a report. It includes ADA procedure codes in case the patient's health plan requires that information.

To open the new Ledger Report, after selecting a patient, open the **Patient** menu and then select **Ledger Report** (under Financial).



In the Ledger Report window that appears, select the specific time frame for the report and the report type. For the report type, you can choose between the selected patient or all the patients that share the patient's guarantor. Then, click **Print**.

Ledger Report ✕

Date Range

Today

Year to Date

Last Year

Specific Date

From to

Report Type

Guarantor

Patient Only

A new browser tab opens with a PDF print preview. You can download and save the file so you can upload it to the Document Manager later or email it to the patient. Commonly you will use the print dialog in your browser to print the report and hand it to the patient.

Note: The highlights in the image below just call attention to the types of transactions that the report might include.

GUARANTOR LEDGER REPORT								
VIP-Dental123 18 W Market Street Salt Lake City, UT 84180-1235								
GUARANTOR / RESPONSIBLE PARTY Olivia Black 1416 Circle Dr. West Valley City UT 85671-1111								
		<table border="1"> <thead> <tr> <th>START DATE</th> <th>END DATE</th> </tr> </thead> <tbody> <tr> <td>01/01/2022</td> <td>12/31/2022</td> </tr> </tbody> </table>	START DATE	END DATE	01/01/2022	12/31/2022		
START DATE	END DATE							
01/01/2022	12/31/2022							
DATE	DESCRIPTION	PATIENT NAME	AMOUNT	BALANCE				
12/31/2021	Balance Forward			0.00				
10/27/2022	D0418 - Analysis of Saliva Sample **	Olivia Black	100.00					
	D0180 - Periodontal Evaluation **	Olivia Black	133.20					
	D0210 - Intraoral – comprehensive series of radiographic images	Olivia Black	100.00	333.20				
10/27/2022	Bankruptcy Write-off \$50.00*	Olivia Black	-50.00	283.20				
10/27/2022	Primary dental insurance claim 00083C2B17104398A07D5845685 [\$233.20] Claim status: UNPAID							
10/27/2022	Insurance Adjustment \$40.00	Olivia Black	-40.00	243.20				
11/17/2022	D0145 - Evaluation of Young Patient	Olivia Black	100.00					
	D0120 - Periodic Evaluation	Olivia Black	150.00	493.20				
12/07/2022	D1352 - Preventive Restoration, Perm Th Th: 2	Olivia Black	100.00	593.20				
10/27/2022	Patient Financing Payment \$18.00	Olivia Black	-18.00	575.20				
12/31/2022	Balance as of 12/31/2022			575.20				

(*) = Payments have been split between more than one visit. (**) = Pending insurance payment.

The Ledger Report does not get added to the Patient Connection.

Insurance

This update introduced multiple enhancements which improve the workflow for processing bulk insurance carrier payments received through an insurance credit card. The enhancements specifically apply to the integrated Dentrix Ascend Pay service.

Note: Dentrix Ascend Pay is included with your subscription, but it is powered through WorldPay, a third-party provider of credit card transaction services. For information about buying, configuring, and using Dentrix Ascend Pay, refer to the [Dentrix Ascend Pay Getting Started Guide](#).

Insurance Credit Card Bulk Payment using Dentrix Ascend Pay

You are now able to use Dentrix Ascend Pay to process bulk insurance payments using an insurance carrier credit card. The bulk insurance payments workflow is very much the same except that the last step includes the ability to use Dentrix Ascend Pay to process bulk insurance credit card payments if you have a World Pay account.

A new **Use lane** field and a **Process Card** button appear on the Summary tab so you can process the insurance credit card payment using Ascend Pay.

Create New Bulk Insurance Payment ✕

Setup steps: Payment Information Select Claims Summary

Claims Included on the Bulk Payment from **Delta Dental of Virginia** (\$600.00)

Patient Name	Service Date	Created On	Subscriber	Insurance Plan	Amount Billed
Franko, Ivan	02/09/2023	02/09/2023	Franko, Ivan	Metlife Plan	400.00
Shevchenko, Taras	02/09/2023	02/09/2023	Shevchenko, Taras	Metlife Plan	1,213.54
Stus, Vasyl	02/09/2023	02/09/2023	Stus, Vasyl	Metlife Plan	124.00

Use lane * ISMP4 Total billed (3 Claims) \$1,737.54

← Back
Create
or
Process Card
Cancel

In the Summary tab the **Use lane** field lets you select the payment terminal, and the **Process Card** button starts the transaction, at which time Dentrix Ascend waits for you either to swipe or insert a physical card if one was provided or to enter the virtual card information manually.



If something did not work, or the transaction was canceled, you will see an alert message in the Create New Bulk Insurance Payment window, and the **Process Card** button name will change to **Click to Try Again**.

Create New Bulk Insurance Payment

Setup steps: Payment Information Select Claims Summary

Alert. The "Cancel" key was pressed in response to a prompt on the PINpad device. The transaction in progress was canceled.

Use lane * ISMP4

or

When the transaction is successful, the window switches back to the Payment Information tab to display the masked credit card number, approval date/time, and the Transaction ID associated with this payment.

Edit Bulk Insurance Payment ✕

Setup steps: **Payment Information** | Select Claims | Summary

Carrier name *

Payment date *

Amount * \$

Payment method *

Credit Card	Cardholder name	Approval date time	Transaction ID
Discover - *****1111		02/09/2023 6:55:32PM	210041105

Important: Once WorldPay has processed this transaction you cannot change, void, or delete the bulk insurance payment because an insurance credit card is a one-use-only payment method.

Bulk insurance payment activity is tracked in the Audit log.

Updated Deposit Slip Report

The Deposit Slip Report will include the reference numbers generated for bulk insurance credit card payments entered using Dentrix Ascend Pay. (The added **Reference #** column is present for all credit card payments processed using Dentrix Ascend Pay.)

Deposit Slip Report Print

Filters

Date Range
2/9/2023-2/9/2023

Run by
 Transaction date
 Modified date period

Payment Methods
 All
 Cash payments
 Check payments
 Insurance check payments
 Credit card payments
 Include voided payments
 Insurance credit card payments
 Insurance electronic payments
 Patient financing payments
 Electronic transfer payments

Search

VIP-Dental123

Credit Card Payments (4) Total **489.98**

Transaction Date	Name	Transaction ID	Reference #	Amount
02/09/2023		210011033	7bd323830b...	152.99
02/09/2023		210011324	9a5243f31d4d4d1...	36.99
02/09/2023				100.00
02/09/2023		210021442	20a0e4da391649...	200.00

Insurance Credit Card Payments (4) [Collapse rows](#) Total **1,014.99**

Transaction Date	Patients	Carrier Name	Transaction ID	Reference #	Amount
02/09/2023		Delta Dental of Virginia	210019637	aa012b96-0de9-4fad-8a75-a2...	235.00
02/09/2023		Delta Dental of Virginia	210041105	5a92cf5e-8d6e-429f-8161-36a...	600.00
	Ivan Franko				400.00
	Taras Shevchenko				100.00
	Vasyl Stus				100.00
02/09/2023		Delta Dental of Virginia			50.00

Credit card payments **489.98**
 Insurance credit card payments **1,014.99**
Totals 1,504.97

Updated Integrated Payment Report

Like all other Dentrrix Ascend Pay payments, insurance credit card payments show up in the Integrated Payments Report.

Integrated Payments Report Print

Worldpay account WorldPayAccount ID 1096759 Location VIP-Dental123

Date & Time	Card Holder	Card Type	Transaction ID	Source	Reference #	Transaction Type	Amount
02/03/2023 - 02/09/2023	Search here	Select type	Search ID's	Select	Search	Select type	Search
02/09/2023 6:55 PM		Discover	210041105	In office	5a92cf5e-8d6e-4...	Payment	600.00
02/09/2023 5:10 PM		Other	210021442	In office	Franko Ivan 20a0...	Payment	200.00
02/09/2023 5:00 PM		Discover	210019637	In office	aa012b96-0de9-...	Payment	235.00
02/09/2023 4:16 PM		Visa	210011324	In office	Hua Mulan 9a52...	Payment	36.99
02/09/2023 4:15 PM		Discover	210011033	In office	Crichton Michael ...	Payment	152.99

Added refinements to processing bulk insurance credit card payments using Dentrrix Ascend Pay will appear in later software releases.

Merge Carriers Enhancement

This release introduces an enhancement to the merge carriers feature. Now after you merge two insurance carriers, a **note** is added to the Claim Detail to help you track the history of the claim.

When you open the claim and select the Status tab, you can see a note that the claim was moved from the old Payer ID number to the new Payer ID number and the date that the carriers were merged.

Claim Detail - Aanya Abbott (Primary) \$122.00 x

Procedures | General | Claim Info | Attachments | Status/Notes

Status: UNSENT Refresh Status Sent Created 02/10/2023

Payer Claim Reference # Replace Claim Void Claim

Notes Add Note

Date & Time	Source	Note
02/10/2023 11:19 AM	sjones	This claim was previously attached to payer ID 06126 and on 02/10/2023 was moved to payer ID 60054 when carriers were merged

Save
Submit
Split Claim
Print
Cancel
Delete Claim

Clinical

Clinical Note Tasks Report Enhancements

This release introduces a new **Include Full Provider Totals** option, a **Reset** button, and the ability to view **inactive providers** in the Clinical Notes Tasks Report.

Filter

Locations *

All selected

Include Full Provider Totals ?

Date Range

01/12/2023-02/10/2023

Running the report for a period longer than 30 days or multiple locations may require several minutes to generate the results.

Other features are in the process of being developed and are coming soon.

Providers *

All Providers ×

Search Reset

Note: By default, the **Include Full Provider Totals** checkbox is not selected.

When you select **Include Full Provider Totals**, a new **Provider Totals** summary appears at the top of the report for the locations you selected Under Locations.

The Provider Totals section includes a breakdown of outstanding clinical note tasks for each provider and a grand total of outstanding clinical note tasks for the selected locations within your organization.

Clinical Note Tasks Report

Filter

Locations *
2 of 4 selected

Include Full Provider Totals

Date Range
01/12/2023-02/10/2023

Running the report for a period longer than 30 days or multiple locations may require several minutes to generate the results.

Other features are in the process of being developed and are coming soon.

Providers *
All Providers

Clinical Note Tasks - Locations and Providers

▼ **Provider Totals**

Provider	Unsigned	Not Entered	In Progress	All
Fillem Ken - DDS4	0	0	1	1
Greenwell Brannan - DDS2	1	0	0	1
McDermott Adam - DDS1	1	1	2	4
Totals	2	1	3	6

▼ **Cottonwood Dental**

Provider	Unsigned	Not Entered	In Progress	All
Greenwell Brannan - DDS2	1	0	0	1
McDermott Adam - DDS1	0	1	0	1

▼ **Alpine Dental**

Provider	Unsigned	Not Entered	In Progress	All
Fillem Ken - DDS4	0	0	1	1
McDermott Adam - DDS1	1	0	2	3

The new **Reset** button allows you to clear your earlier selections and re-run the report without exiting the page.

User Rights

No new user rights were added in this update.

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 recently added topics. Click a title to open the topic.

Videos

[Dentrix Ascend Detect AI](#)

Dentrix Ascend Detect AI, powered and manufactured by VideHealth, is an X-ray analysis software that helps dentists detect caries earlier, avoid misdiagnosed or missed caries, and provide a higher level of patient care. This technology is conveniently built right into Dentrix Ascend Imaging so that it fits seamlessly into your imaging workflow. Watch this video to learn how to use Dentrix Ascend AI in your imaging workflow.

[Merging Insurance Carriers](#)

Insurance carriers can sometimes be set up in error. This can happen when you accidentally add a carrier that already exists in your database or you enter a carrier with an unsupported Payer ID 06126,

thinking it was the supported version of a carrier. In either situation, you can fix these errors using the merge carrier feature in Dentrix Ascend. Watch this video to learn how to merge insurance carriers.

Blogs

[Seeing Unscheduled Treatment in Your Practice](#)

Day after day, you provide treatment plans to patients. But, do you know how many patients *actually* scheduled appointments and how much production you have on the books? The Unscheduled Treatment – Pie Chart report is a great way for you to see an overview of unscheduled treatment for each provider or location in your organization. Read this tip to learn more about seeing unscheduled treatment in your practice.

[View and Diagnose Patient Images All at One Time](#)

Did you know that you can view and diagnose patient images all at one time instead of having to open the individual images? You can do this when you click Display All Images in the Template/Mount. Read this tip if you're looking for ways to save time when viewing and diagnosing images.