

DENTRIX ASCEND

Release Notes: July 23, 2019 (Prod 339)

The product update released July 23rd, 2019, includes new features and enhancements to existing features. New with this update is the ability to edit patient medical history and dental history responses after they have been submitted. Two new payment methods are available to the Ledger. Providers now have the ability to pause and later resume clinical notes entered using templates, and a new Power Report has been added for payment and adjustment tags.

Patient Information

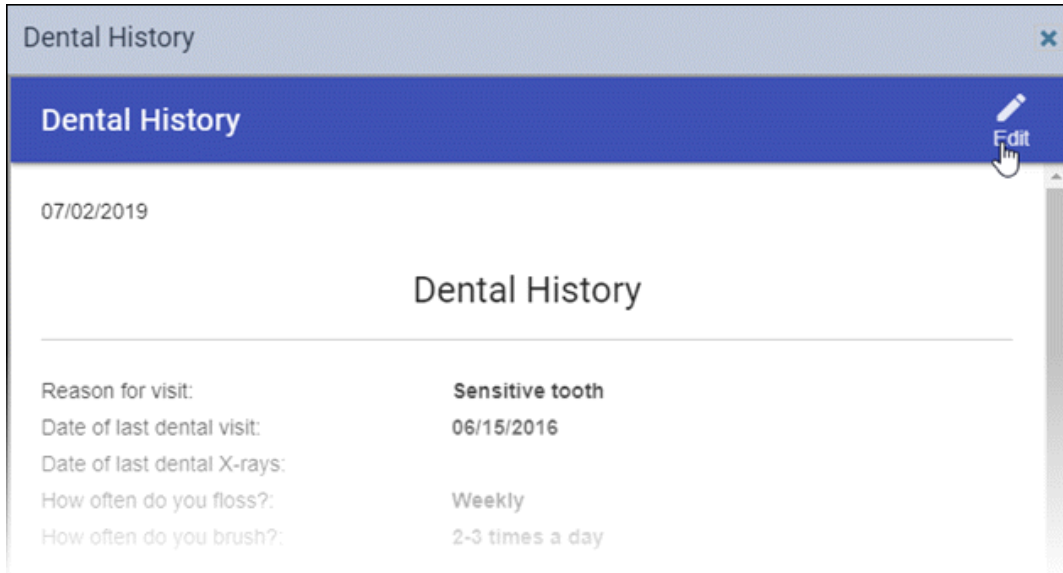
Patient Response Editing

With this update, users can now edit the responses in the four Dentrrix Ascend questionnaires (Demographics, Dental Insurance, Dental History, Medical History) after a patient has filled one out and it has been submitted to the **Patient Forms** list. To be clear, this editing capability is *not* about the templates, just the individual responses within a completed questionnaire. Consent forms cannot be edited.

A common scenario might be that you open and review the patient's most recent Dental History form when they come in for their next appointment. Click the **Last Received** date or the **arrow** next to the form name to expand the list of questionnaires already filled out by this patient. (The pencil edit icon has been removed.) You can only edit the most recent form; click to open that form.

Patient Information				
Basic Info Related Patients Medical Alerts Patient Forms Preferences Referrals Notes	Patient Forms			Request Forms
	Form Type	Last Received	Due Date	
	Demographics	Never	Due Now	
	Dental Insurance	Never	Due Now	
	Medical History	Never	Due Now	
	Dental Practice Financial Policy	Never	Due Now	
	▼ Dental History	07/02/2019	11/29/2019	
Dental History - Received on: 07/02/2019				

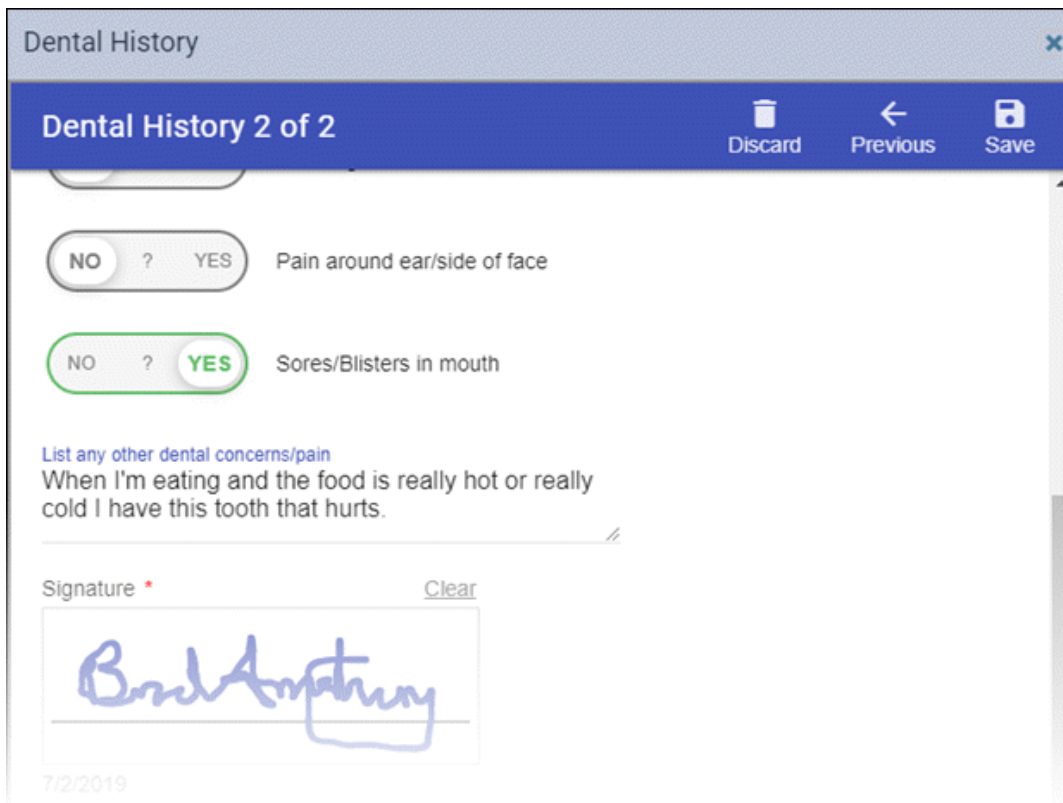
During the interview, the provider decides that an answer needs to be changed. To do this, click **Edit**.



The screenshot shows a web browser window titled "Dental History". The form header is blue with "Dental History" and an "Edit" button (pencil icon) in the top right. The date "07/02/2019" is displayed. The main title "Dental History" is centered. Below it, a table lists patient information:

Reason for visit:	Sensitive tooth
Date of last dental visit:	06/15/2016
Date of last dental X-rays:	
How often do you floss?:	Weekly
How often do you brush?:	2-3 times a day

Make changes as needed. When you are finished, you must sign the form before it can be saved.



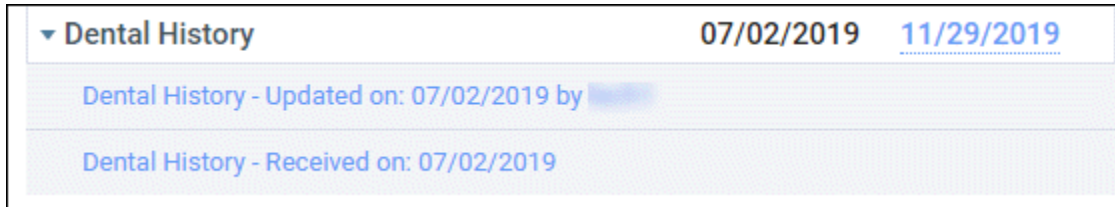
The screenshot shows the same "Dental History" form, now in a "Save" mode. The header is blue with "Dental History 2 of 2" and buttons for "Discard", "Previous", and "Save". The form contains two toggle questions:

- NO ? YES Pain around ear/side of face
- NO ? YES Sores/Blisters in mouth

Below these is a text field with the prompt "List any other dental concerns/pain" and the text "When I'm eating and the food is really hot or really cold I have this tooth that hurts." A signature field is labeled "Signature" with a "Clear" link and contains a handwritten signature in blue ink. The date "7/2/2019" is visible at the bottom left.

A new instance of the form is created, and this edited version shows up in the form history as "Updated" and includes the name of the employee that opened the form for editing. The patient's original

submission of the form is retained for historical purposes, so any changes can be more properly viewed as an addendum rather than an edit.



▼ Dental History 07/02/2019 11/29/2019

Dental History - Updated on: 07/02/2019 by [redacted]

Dental History - Received on: 07/02/2019

In a workflow, if for example the Dental History form says “No” to grinding teeth, but then the doctor does an exam and observes that the patient actually *does* grind their teeth, the doctor can click on the form, change the answer to “Yes”, and sign his or her own name to the form.

Forms button added to Chart

Patient forms can now be viewed or requested directly from the Chart through a new **Forms** button.

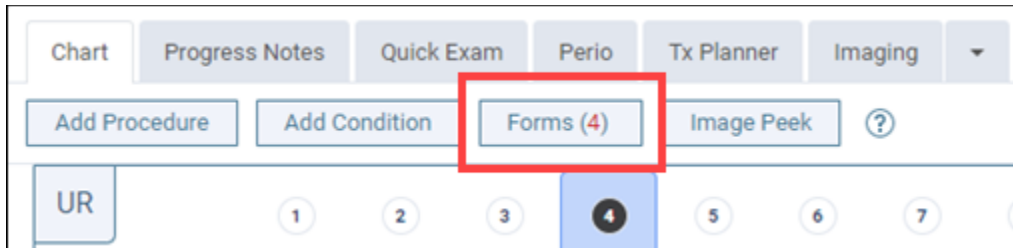


Chart Progress Notes Quick Exam Perio Tx Planner Imaging

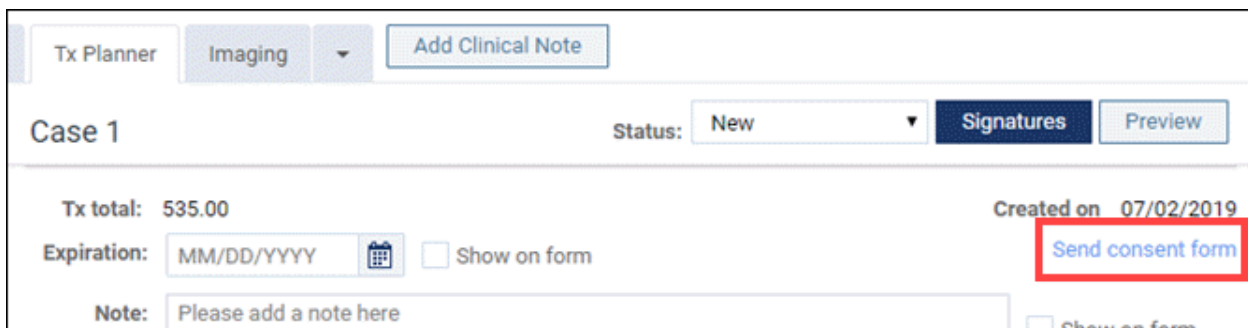
Add Procedure Add Condition **Forms (4)** Image Peek ?

UR 1 2 3 4 5 6 7

Clinical

Electronic Treatment Consent Forms

When you or anyone on your staff create a treatment plan case, you may now electronically send a consent for treatment form to the patient. You do not need to present the case; once the procedures are assigned, a **Send consent form** link appears within the case.



Tx Planner Imaging Add Clinical Note

Case 1 Status: New Signatures Preview

Tx total: 535.00 Created on 07/02/2019

Expiration: MM/DD/YYYY Show on form **Send consent form**

Note: Please add a note here Show on form

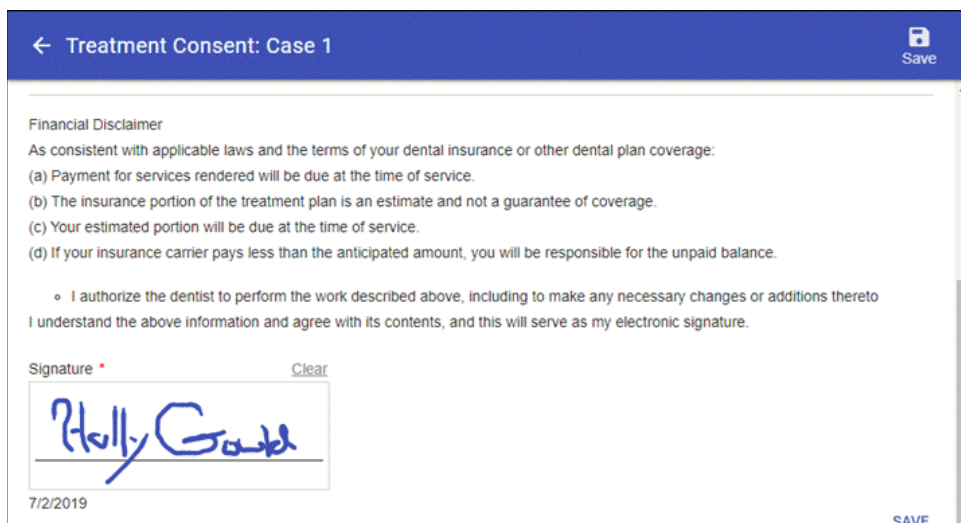
Click the link to open the standard **Request Forms** popup. If the patient is in your office or in the chair, you can present the form on a tablet or the patient's own device. Select the method that best suits your circumstances.



A screenshot of a web application popup window titled "Request Forms for Holly A Gould". The window has a close button (X) in the top right corner. It contains three buttons: "Text Link", "Email Link", and "Copy Link". The "Copy Link" button is highlighted in blue and has a tooltip that says "Click here to access forms" and "Link is valid until 07/16/2019". Below the buttons is a large QR code with an information icon (i) to its right. At the bottom of the popup, there is a "Print QR Code" button and a "Close" button.

After the patient signs in, the form is listed with the title **Treatment Consent: [Case Name]**. As with any form, click the name to open the form.

The form contains the information you see in a printed version of the treatment plan, but without the insurance benefits breakdown or a way to link to the estimated guarantor portion. After the patient reviews the proposed treatment and any disclaimers you may have included, they sign and save the form.



A screenshot of a web application form titled "Treatment Consent: Case 1". The form has a blue header with a back arrow, the title, and a "Save" button. The main content area contains a "Financial Disclaimer" section with the following text: "As consistent with applicable laws and the terms of your dental insurance or other dental plan coverage: (a) Payment for services rendered will be due at the time of service. (b) The insurance portion of the treatment plan is an estimate and not a guarantee of coverage. (c) Your estimated portion will be due at the time of service. (d) If your insurance carrier pays less than the anticipated amount, you will be responsible for the unpaid balance." Below the disclaimer is a radio button and the text: "I authorize the dentist to perform the work described above, including to make any necessary changes or additions thereto. I understand the above information and agree with its contents, and this will serve as my electronic signature." There is a "Signature" field with a red asterisk and a "Clear" button. The signature field contains a handwritten signature "Holly Gould" in blue ink. At the bottom left of the form, the date "7/2/2019" is displayed. At the bottom right, there is a "SAVE" button.

Once the patient signs the consent form, a link to that form appears in the treatment case. (The case status changes to Accepted, and the form is also available from the **Patient Forms** tab in the **Patient Information** page.) At this point the provider and an informed consent witness can also sign the consent, by clicking on the **Signatures** button.

The screenshot shows a software interface for a treatment case. At the top, there are tabs for 'Tx Planner' and 'Imaging', and a button for 'Add Clinical Note'. Below this, the case is identified as 'Case 1' with a status of 'Accepted'. A 'Signatures' button is highlighted with a mouse cursor, and a 'Preview' button is also visible. The 'Tx total' is 535.00, and the case was 'Accepted on 07/02/2019'. A red box highlights the text 'Consent form received on 07/02/2019'. There is also an 'Expiration' field with a date picker and a 'Show on form' checkbox. A note field at the bottom contains the text 'Please add a note here'.

The **Signatures for [Case Name]** window works just like signing a clinical note; the provider and witness select their names from the corresponding dropdown, enter their passwords, and click **Sign** to insert their [electronic signatures on file](#).

The screenshot shows a window titled 'Signatures for Case 1'. It contains several fields and buttons. The 'Provider' field is a dropdown menu with 'PRO5 - Sheldon Carlow' selected. The 'Password' field is a text box with masked characters. A 'Sign' button is highlighted with a mouse cursor. Below this, there is a 'Patient/Guardian Signature' section with the text 'Signed 07/22/2019' and a 'Resend Form' button. The 'Informed Consent Witness' section has a dropdown menu with 'Kait Daniels' selected, the text 'Signed 07/22/2019', and a handwritten signature 'Kait Daniels'.

Provider and witness signatures are optional. Include them if that is part of your workflow and practice policy. Note that if they do sign, and if you later print the treatment plan, the signatures will automatically transfer to the print version (no need to sign again). Note also that if the provider or witness sign before you send the form to the patient, those signatures will be present on the electronic form.

Configuring the Consent for Dental Treatment Message

Like the financial disclaimers for insured or uninsured patients, a default message is provided for treatment consent. You can edit this text to present your own custom message. To modify the treatment consent language, go to **Settings > Patient Forms** and click to open the **Consent for Dental Treatment** tab. If needed, click **Reset to default** to restore the default text.

The screenshot shows the 'Patient Forms' configuration interface. On the left, there are three main sections: 'Questionnaires' (Demographics, Dental Insurance, Dental History, Medical History), 'Consent Forms' (Dental Practice Financial Policy, Notice: X-rays and Insurance Coverage, Custom Consent Form 1, Custom Consent Form 2, Custom Consent Form 3), and 'Tx Consent Messages' (Insured/Uninsured Disclaimers, Consent for Dental Treatment). The 'Consent for Dental Treatment' option is selected. The main content area displays the default consent text, which is currently in a placeholder state (###Consent for Dental Treatment###). A 'Reset to default' link is visible in the top right corner of the text area.

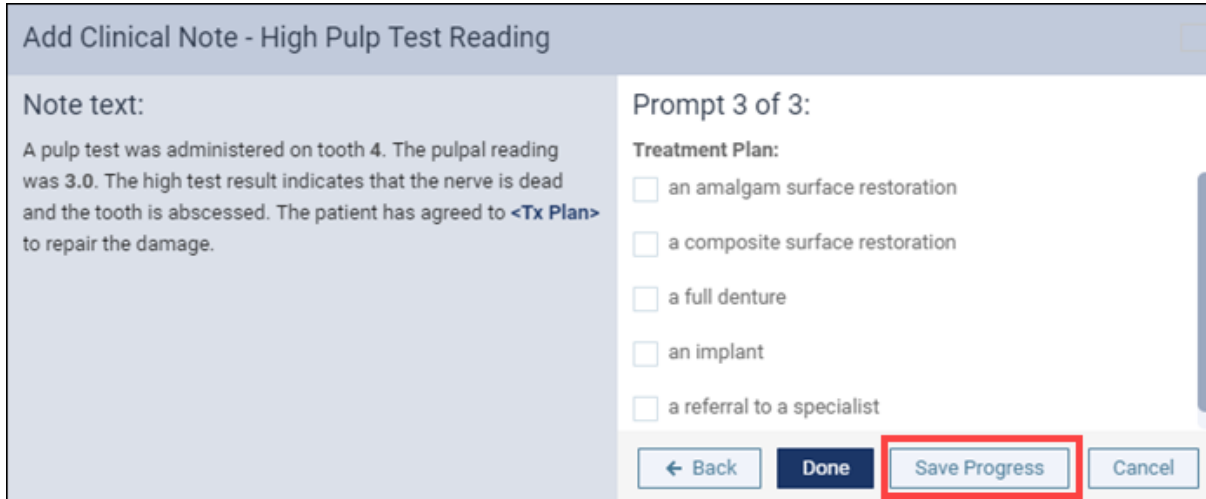
Other Tx Planner Changes

- The treatment consent form automatically posts to the patient's Document Manager with the name **Treatment Consent – [Case Name]** and the tag "Tx Consent".
- Case status changes are now tracked in the Audit log.
- The treatment case check boxes previously labeled "Show on printout and preview" are now called "Show on form". When checked, the expiration date you selected or the note you added will show on the preview, the printout, and the digital consent form.

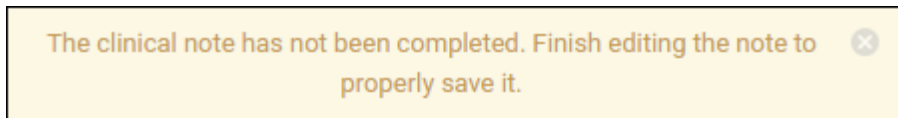
The screenshot shows the 'Tx Planner' interface. At the top, there are tabs for 'Tx Planner', 'Imaging', and 'Clinical Notes'. Below the tabs, the 'Treatment Plan' is displayed with a 'Status' dropdown set to 'New'. There are buttons for 'Signatures' and 'Preview'. The 'Tx total' is 320.00, and it was 'Created on 05/22/2015'. The 'Expiration' is set to 12/31/2019. There is a 'Show on form' checkbox which is checked, and a 'Send consent form' link. Below the expiration, there is a 'Note' field with the text 'Please add a note here' and another 'Show on form' checkbox.

Pause and Resume functionality added to Clinical Note Templates

The pause functionality allows a provider to start filling in a clinical note template, accommodate a workflow interruption, and then return to it later. There is no time limit for completing the note; a paused note just remains in an incomplete state until it is completed. To pause entry, a **Save Progress** button has been added to quick pick templates.



Several things happen when you leave off entering a clinical note. First, you will see a flash message reminder that the note is incomplete.

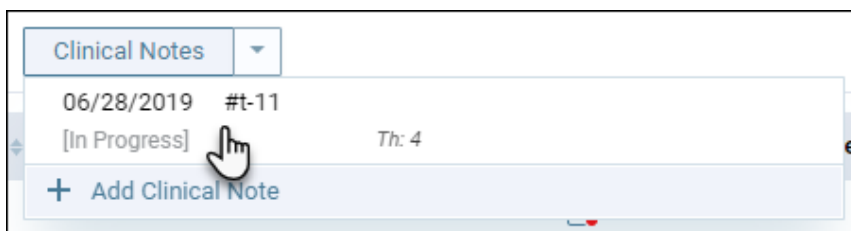


A reminder shows up in the Progress Notes. The note icon will have a red dot, indicating the clinical note is incomplete. Click the icon to open the note and continue where you left off.

Date	Th	Surfaces	Code	Description	Status	Provider	Amount
06/28/2019	4				Note	#t-11	

A hand cursor icon points to a red dot on the 'Note' status cell. A tooltip box below the icon contains the text: 'Clinical note is in progress'.

Incomplete notes show as "In Progress" in the **Clinical Notes** menu. Click the note to open the template and complete your entry.



The **Incomplete Clinical Notes** widget has again been renamed, to **Clinical Note Tasks**. In addition showing a count of unsigned and not entered notes for today and for the last 30 days—a correction to the previous release—it also shows counts for clinical notes in progress.

	Unsigned	Not Entered	In Progress
Today	2	0	3
Last 30 days	2	5	1

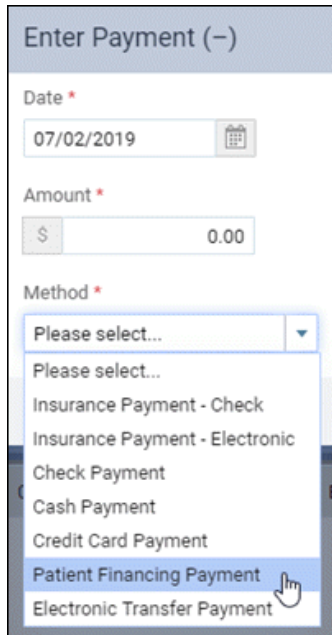
As before, clicking the widget opens a page. The updated **Clinical Note Tasks** page has tabs for Unsigned, Not Entered and In Progress notes (or all, combined). For notes in progress, click a patient name and then the **Resume** button at the bottom of the page to open the clinical note and continue.

The screenshot shows the 'Clinical Note Tasks' interface. At the top, there is a 'Date Range' field set to '05/26/2019 - 06/24/2019'. Below this are filter tabs: 'All', 'Unsigned', 'Not Entered', and 'In Progress' (which is highlighted with a red box). A table lists notes with columns for 'Patient Name' and 'Date'. The first row is highlighted in blue and shows a date of '06/21/2019 (In Progr...'. Other rows show dates '06/19/2019 (In Progr...' and '06/03/2019 (In Progr...'. On the right side, there is a sidebar with the heading 'Note in progress for' and a section titled 'Procedures and Conditions' with a table header containing 'Th' and 'Surface'.

Billing

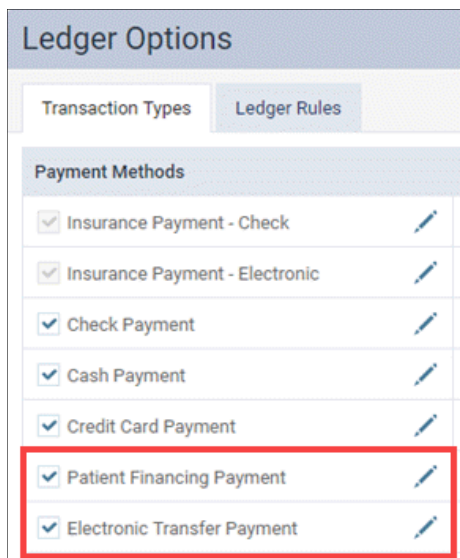
New Payment Methods

Two new payments methods named “Patient Financing” and “Electronic Transfer” have been added to the Ledger’s current list. “Patient Financing” should be considered a generic description that could for example represent payments from CareCredit.



The screenshot shows the 'Enter Payment (-)' form. The 'Date' field is set to 07/02/2019. The 'Amount' field is set to \$ 0.00. The 'Method' dropdown menu is open, showing the following options: Please select..., Insurance Payment - Check, Insurance Payment - Electronic, Check Payment, Cash Payment, Credit Card Payment, Patient Financing Payment (highlighted), and Electronic Transfer Payment.

Like all transaction types, tagging rules may be applied to these payment methods in the **Ledger Options** page.



The screenshot shows the 'Ledger Options' page. The 'Transaction Types' tab is selected. The 'Payment Methods' section is visible, showing a list of payment methods with checkboxes and edit icons. The following methods are listed: Insurance Payment - Check, Insurance Payment - Electronic, Check Payment, Cash Payment, Credit Card Payment, Patient Financing Payment, and Electronic Transfer Payment. The last two methods, Patient Financing Payment and Electronic Transfer Payment, are highlighted with a red box.

The new payment methods are included as line items in all areas of Ascend where payment information is presented, for example the Payment Analysis report, the Day Sheet, the Deposit List report, Billing Statements, Provider A/R Totals, and the Audit log.

Power Reporting

New Payment and Adjustment Tag Report

A new power report named Payment Tags has been added to the suite. The default structure of the report focuses on guarantor and insurance payments made in the previous month, but like other interactive reports can be modified by editing, adding or removing data fields and filters.

The screenshot shows the Power Reporting interface for the 'Payment Tags' report. The sidebar on the left allows for customizing the report layout, including selecting rows (Category, Subcategory, Primary Tag), columns, and measures (Count, Amount). The main area displays a table with 3 filters: Year (current), Month (previous), and Category (Guarantor Payments and Insurance Payments). The table data is as follows:

Category	Subcategory	Primary Tag	Count	Amount
Guarantor Paymen...	Cash Payment	Account Current	1	-\$87.23
		Past Due	1	-\$100.00
	Check Payment	Late	1	-\$25.00
		Prepayment	1	-\$50.00
	Credit Card Payment	American Express	1	-\$250.00
		MasterCard	1	-\$22.50
		VISA	1	-\$75.00
	Electronic Transfer Payme...	Credit Suisse	1	-\$235.00
	Patient Financing Payment	Not Available: spaces e...	1	-\$123.57

When tag restriction rules are in place, mandatory tags are Primary Tags. Where tag restriction rules are turned off, the first tag added is the Primary tag. All additional or optional tags are Secondary Tags. When there are multiple secondary tags, they are all included as comma-separated values within one table cell. Just like all power reports, if the user did not include a tag when posting the transaction, the tag field is empty and the name is "Not Available: spaces etc."

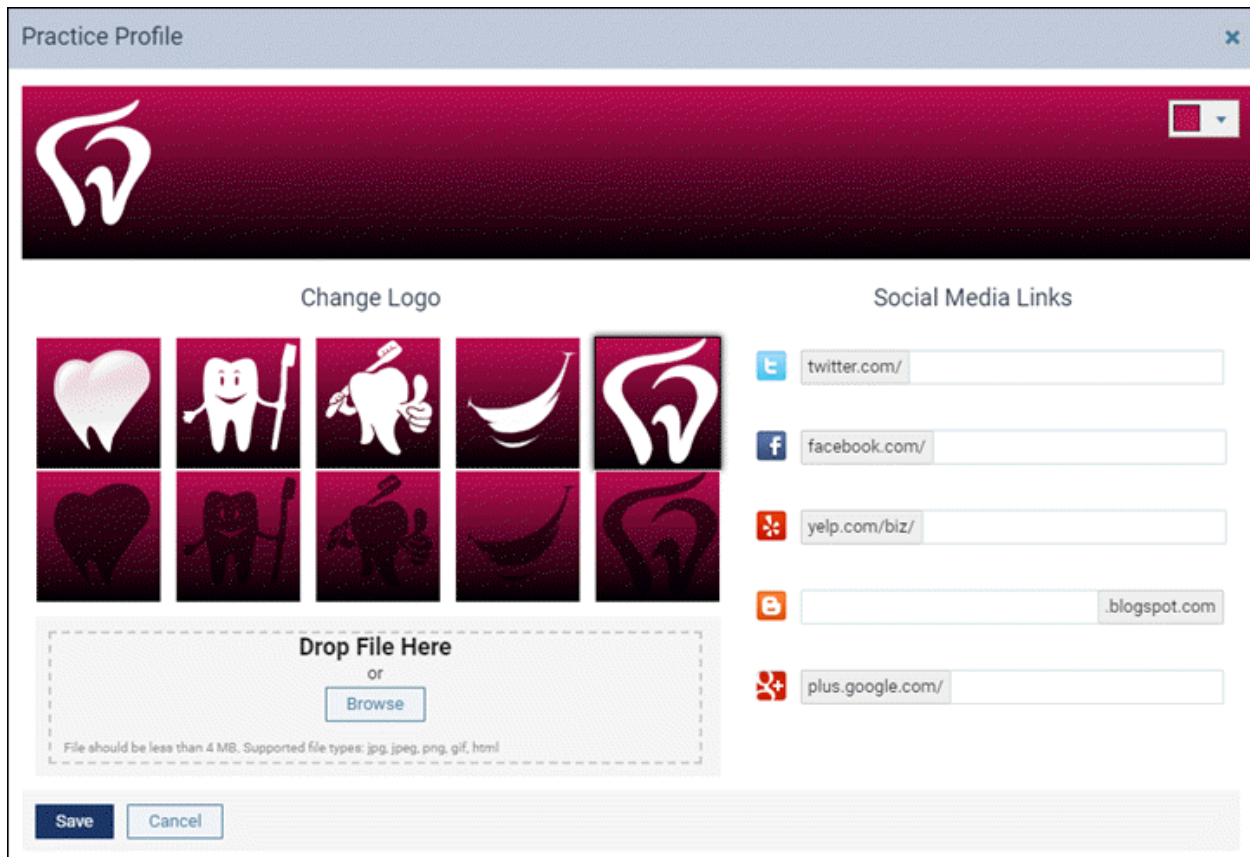
Category	Subcategory	Primary Tag	Secondary Tags	Count	Amount
Guarantor Paymen...	Patient Financing Payme...	Not Available: spaces e...	Not Available: spaces etc.	1	-\$123.57
		CareCredit	Not Available	1	-\$120.00
		SimpleSelect	Financing, Ortho, 24 Month	1	-\$125.00

The **Subcategory** field includes all the transaction types in the **Ledger Options** page, so you can easily modify this report spotlight a particular transaction type and tag name.

Patient Communication

Social Media Links Added to Patient Communications

A **Practice Profile** button just added to the Patient Communications page opens a window where you can change your organization's banner color, select a logo, and add your links to popular social media sites.



The screenshot shows a window titled "Practice Profile" with a close button in the top right corner. The window features a dark red banner at the top with a white logo of a tooth and a flame. Below the banner, there are two main sections: "Change Logo" and "Social Media Links".

Change Logo: This section displays a grid of ten logo options. The top row contains five logos: a heart, a smiling tooth with a toothbrush, a tooth with a toothbrush and a thumbs up, a crescent moon, and the current flame-tooth logo. The bottom row contains five corresponding dark red versions of these logos. Below the grid is a "Drop File Here" area with a "Browse" button and a note: "File should be less than 4 MB. Supported file types: jpg, jpeg, png, gif, html".

Social Media Links: This section contains five input fields for social media links, each with a corresponding icon: Twitter (twitter.com/), Facebook (facebook.com/), Yelp (yelp.com/biz/), Blogger (.blogspot.com), and Google Plus (plus.google.com/).

At the bottom of the window, there are "Save" and "Cancel" buttons.

In conjunction with this change, the **Web Profile** page under the Location **Settings** menu has been removed.

User Rights

No new user rights have added with this release.

Imaging

No updates to the imaging module are included with this release.

New Learning Content

Owed to recent changes such as new Power Reports and the new Insights dashboard, the Customer Success team has been busy making sure the [Customer Success for Dentrax Ascend](#) section of the knowledgebase is also kept up-to-date. You are invited to visit or re-visit these great articles:

[Locking the Transaction Date to Avoid Backdating](#)

[Paying Dentists on Net Production](#)

[Paying Dentists on Collections](#)

[Unscheduled Treatment Reports: 3 Power Reports to Get You Started](#)