DENTRIX ASCEND

Release Notes: July 23, 2019 (Prod 339)

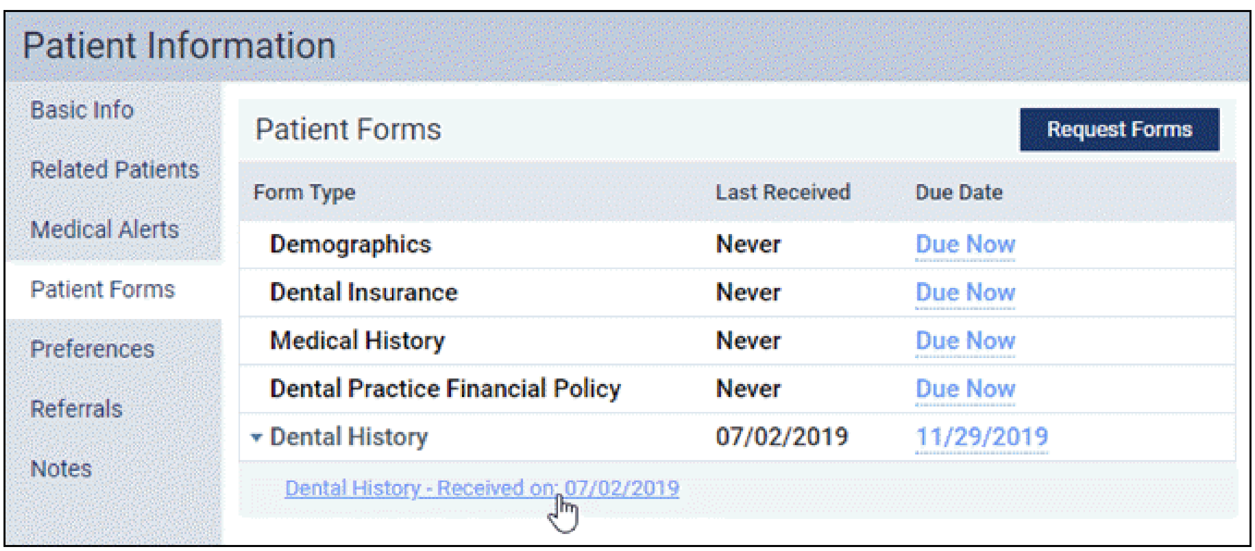
The product update released July 23rd, 2019, includes new features and enhancements to existing features. New with this update is the ability to edit patient medical history and dental history responses after they have been submitted. Two new payment methods are available to the Ledger. Providers now 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

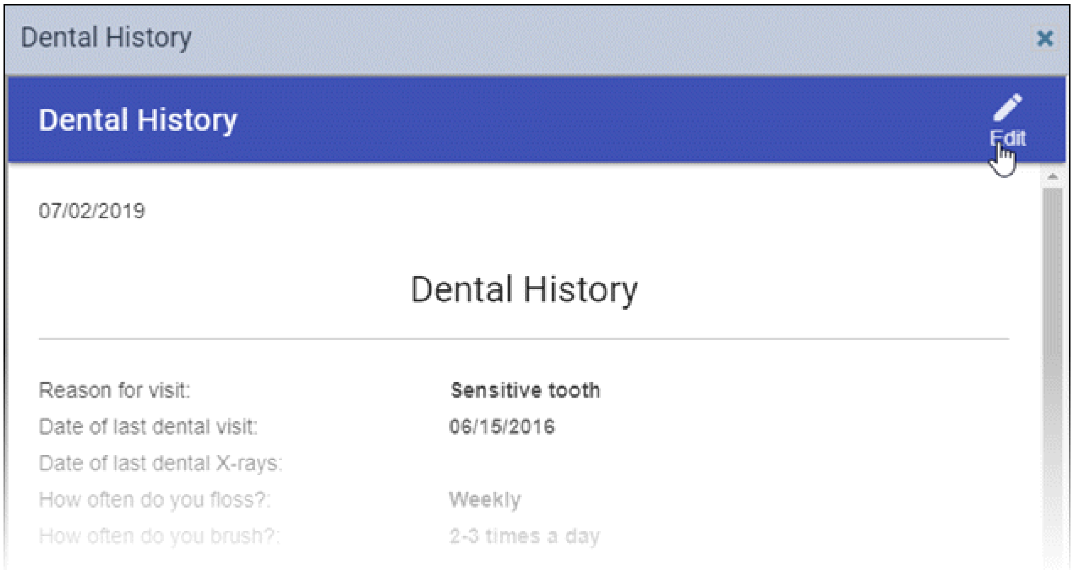
Patient Response Editing

With this update, users can now edit the responses in the four Dentrix 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.

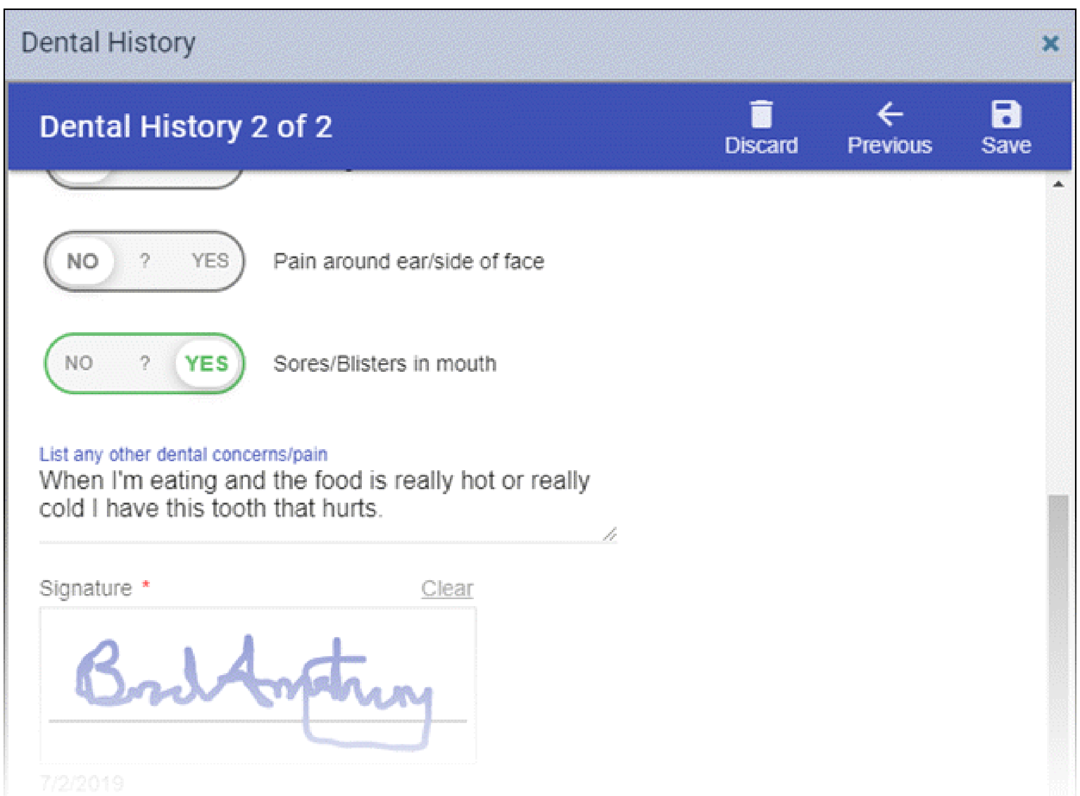
A common scenario might be that you open and review the patient's most recent Dental History form when they come in for their next appointment. Click the **Last Received** date or the **arrow** next to the form name to expand the list of questionnaires already filled out by this patient. (The pencil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



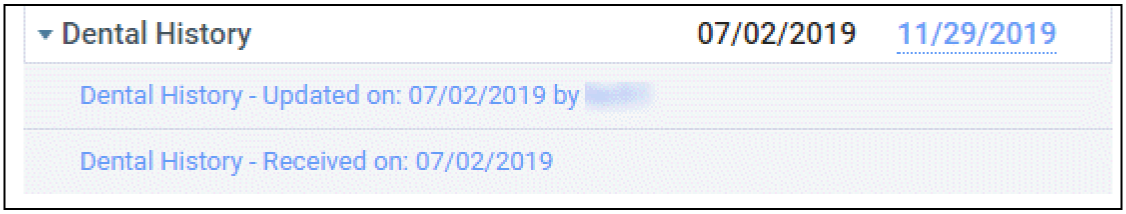
During the interview, the provider decides that an answer needs to be changed. To do this, click **Edit**.



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



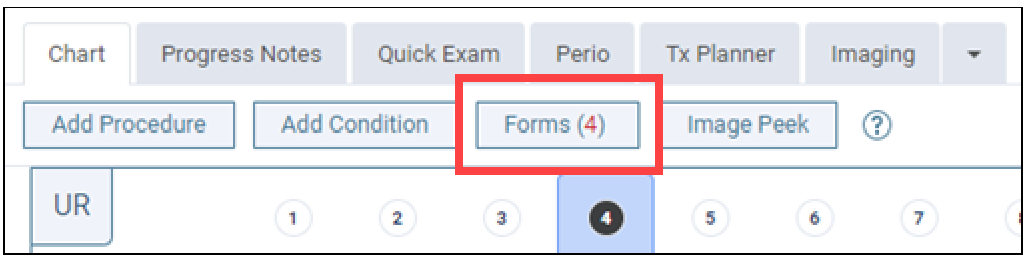
A new instance of the form is created, and this edited version shows up in the form history as "Updated" and includes the name of the employee that opened the form for editing. The patient's original submission of the form is retained for historical purposes, so any changes can be more properly viewed as an addendum rather than an edit.



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

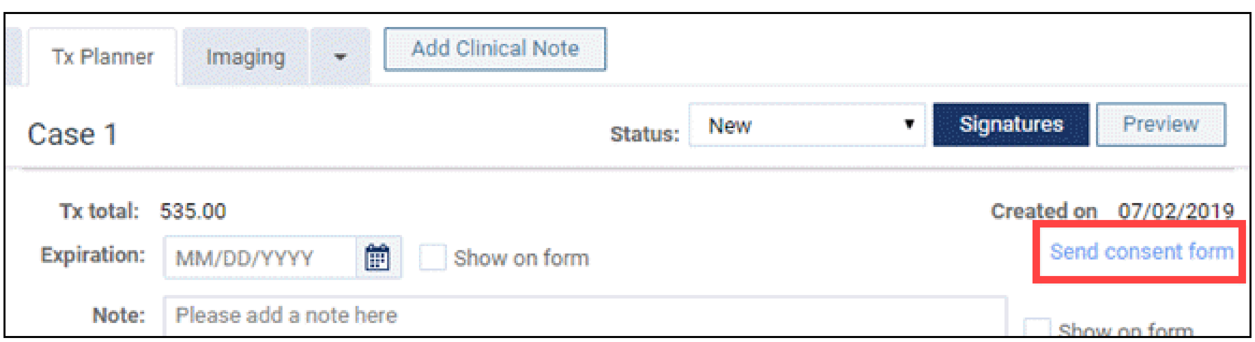
Patient forms can now be viewed or requested directly from the Chart through a new **Forms** button.



Clinical

Electronic Treatment Consent Forms

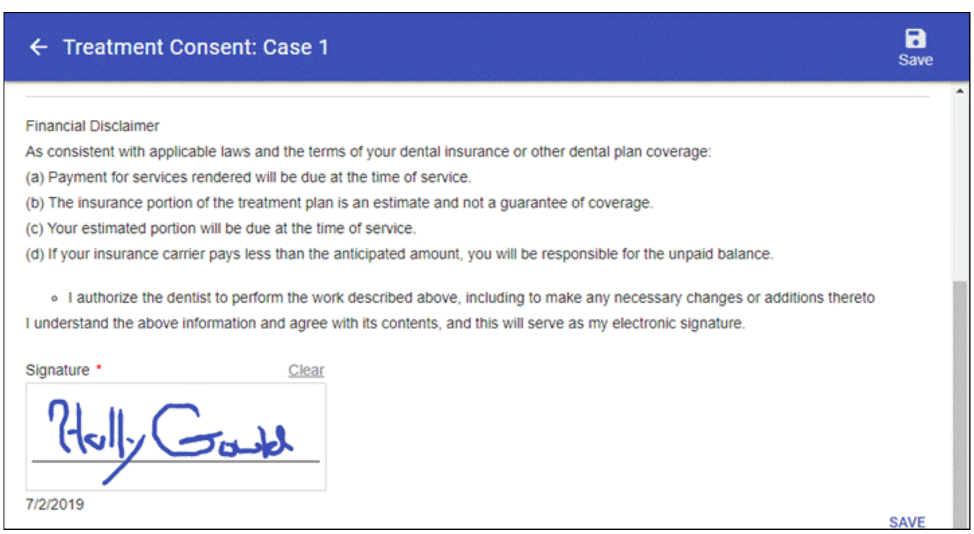
When you or anyone on your staff create a treatment plan case, you may now electronically send a consent for treatment form to the patient. You do not need to present the case; once the procedures are assigned, a **Send consent form** link appears within the case.



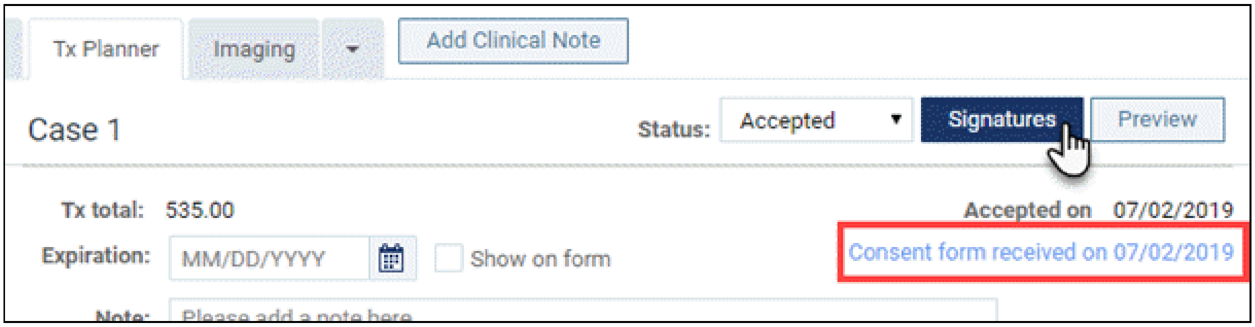
Click the link to open the standard **Request Forms** popup. If the patient is in your office or in the chair, you can present the form on a tablet or the patient's own device. Select the method that best suits your circumstances.

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.



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.

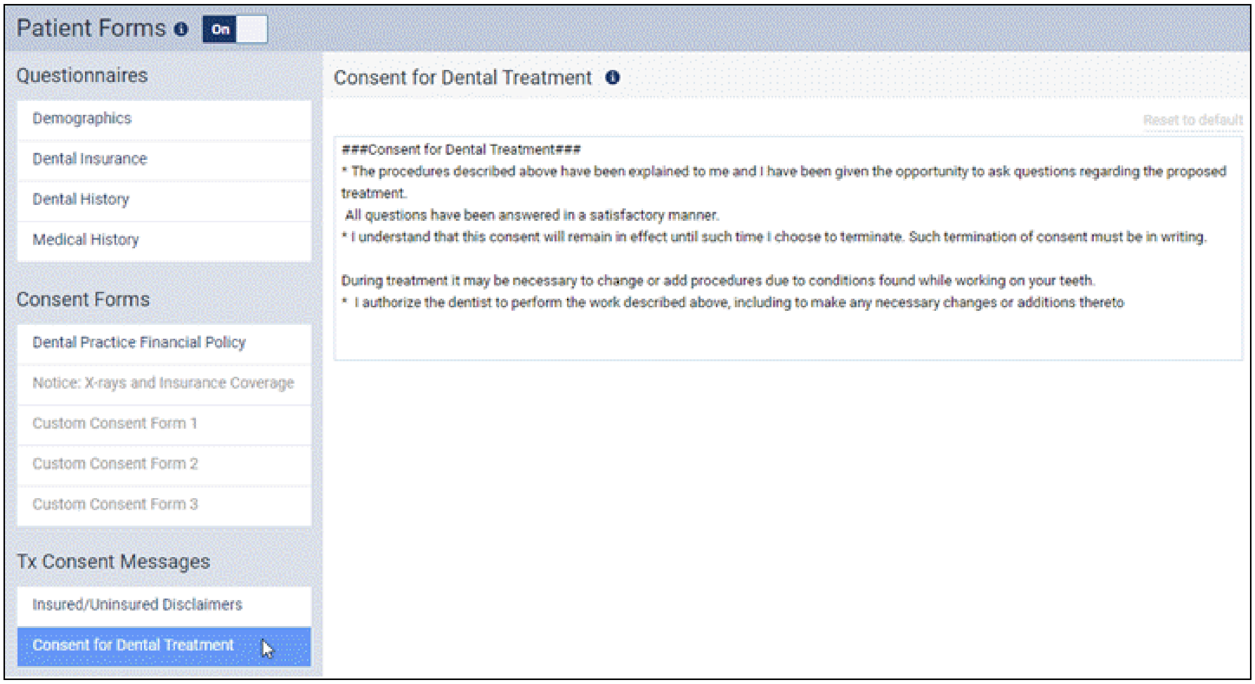


The **Signatures for [Case Name]** window works just like signing a clinical note; the provider and witness select their names from the corresponding dropdown, enter their passwords, and click **Sign** to insert their electronic signatures on file.

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.

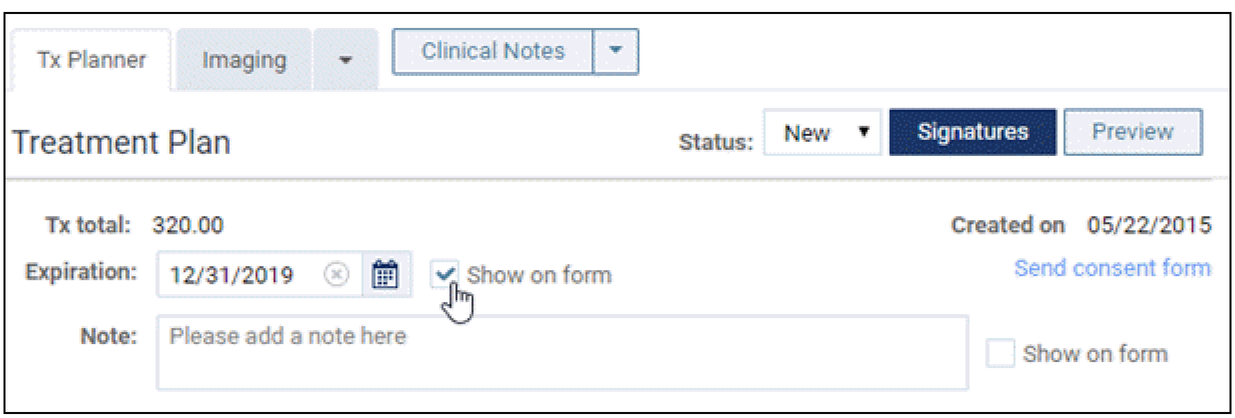
Configuring the Consent for Dental Treatment Message

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.



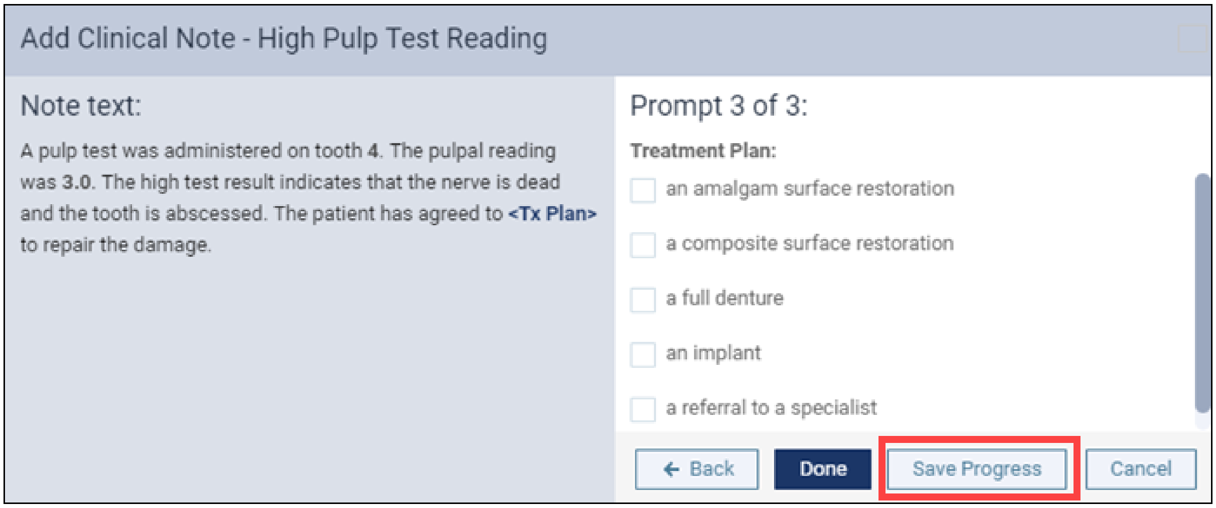
Other Tx Planner Changes

- 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.

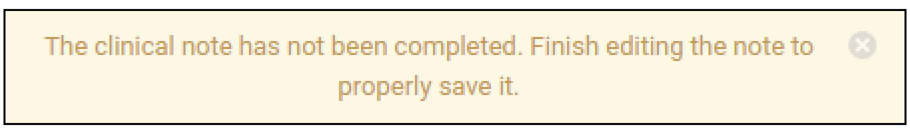


Pause and Resume functionality added to Clinical Note Templates

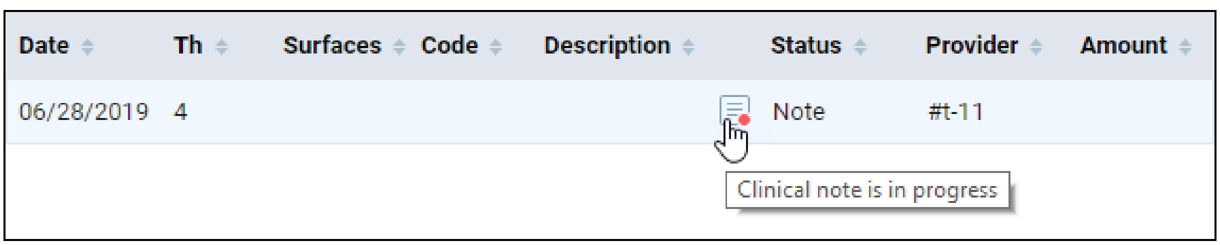
The pause functionality allows a provider to start filling in a clinical note template, accommodate a workflow interruption, and then return to it later. There is no time limit for completing the note; a paused note just remains in an incomplete state until it is completed. To pause entry, a **Save Progress**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



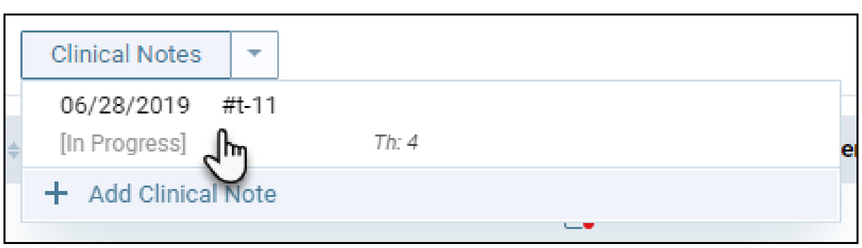
Several things happen when you leave off entering a clinical note. First, you will see a flash message reminder that the note is incomplete.



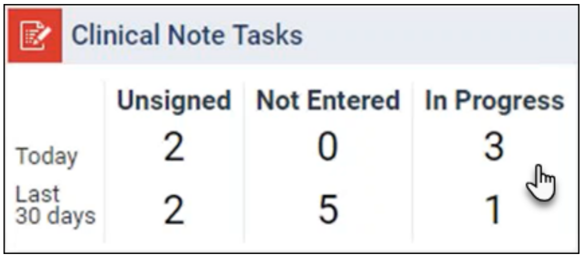
A reminder shows up in the Progress Notes. The note icon will have a red dot, indicating the clinical note is incomplete. Click the icon to open the note and continue where you left off.



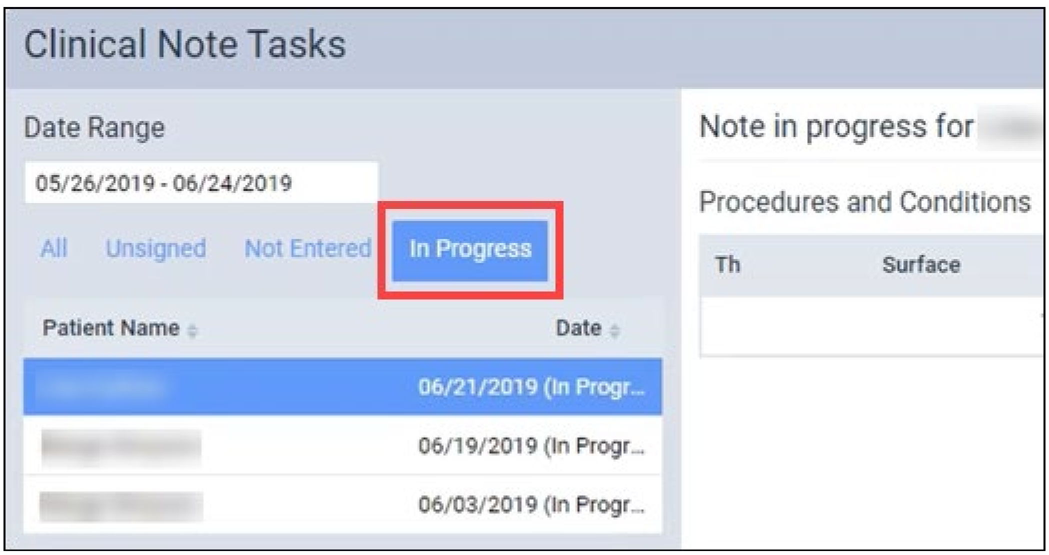
Incomplete notes show as “In Progress” in the **Clinical Notes** menu. Click the note to open the template and complete your entry.



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.

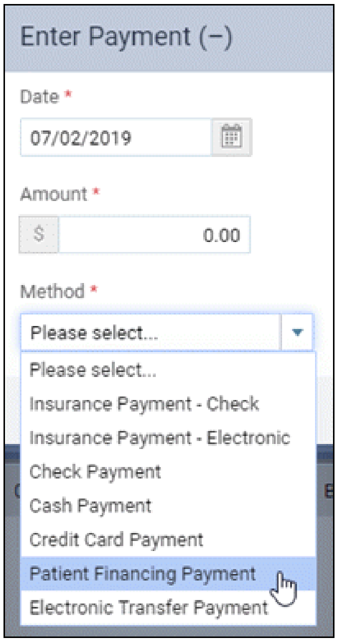


As before, clicking the widget opens a page. The updated **Clinical Note Tasks** page has tabs for Unsigned, Not Entered and In Progress notes (or all, combined). For notes in progress, click a patient name and then the **Resume** button at the bottom of the page to open the clinical note and continue.

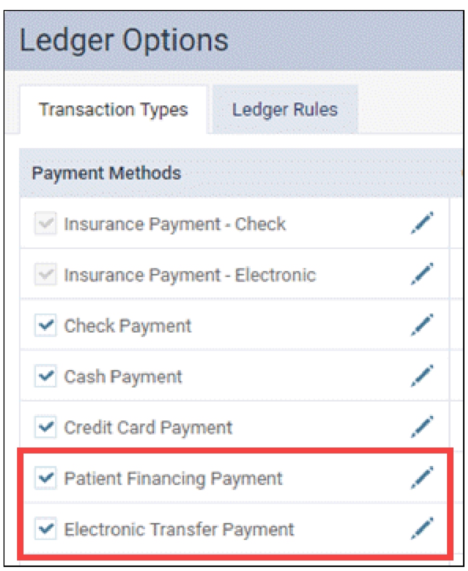


Billing

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.



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

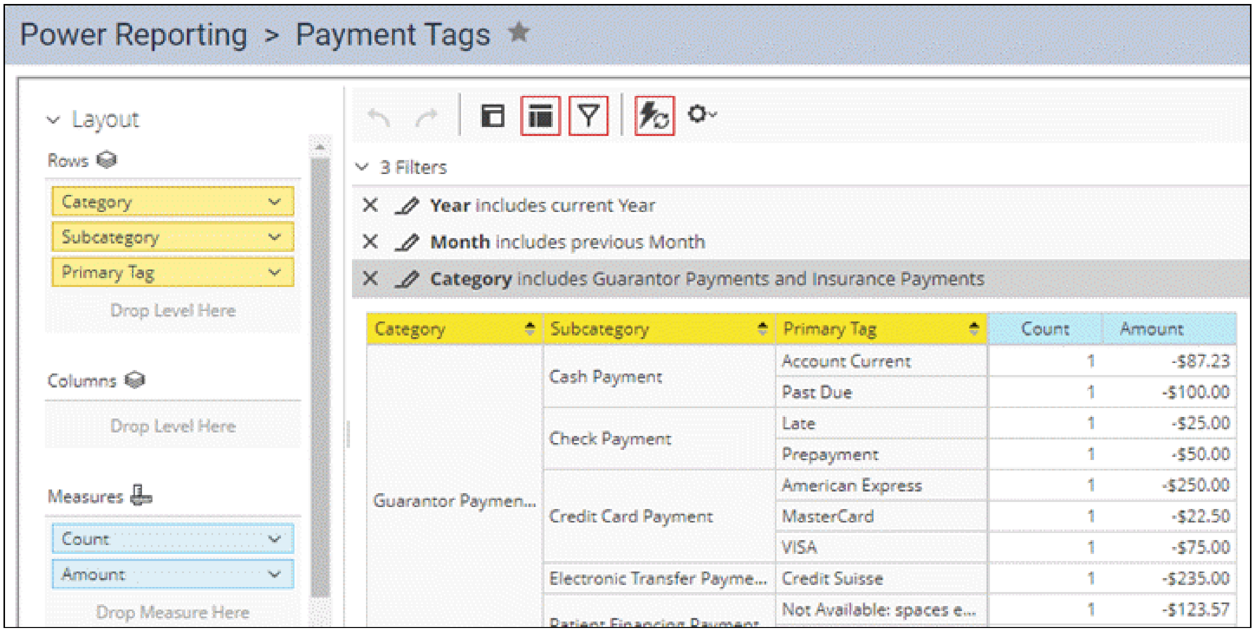


The new payment methods are included as line items in all areas of Ascend where payment information is presented, for example the Payment Analysis report, the Day Sheet, the Deposit List report, Billing Statements, Provider A/R Totals, and the Audit log.

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.



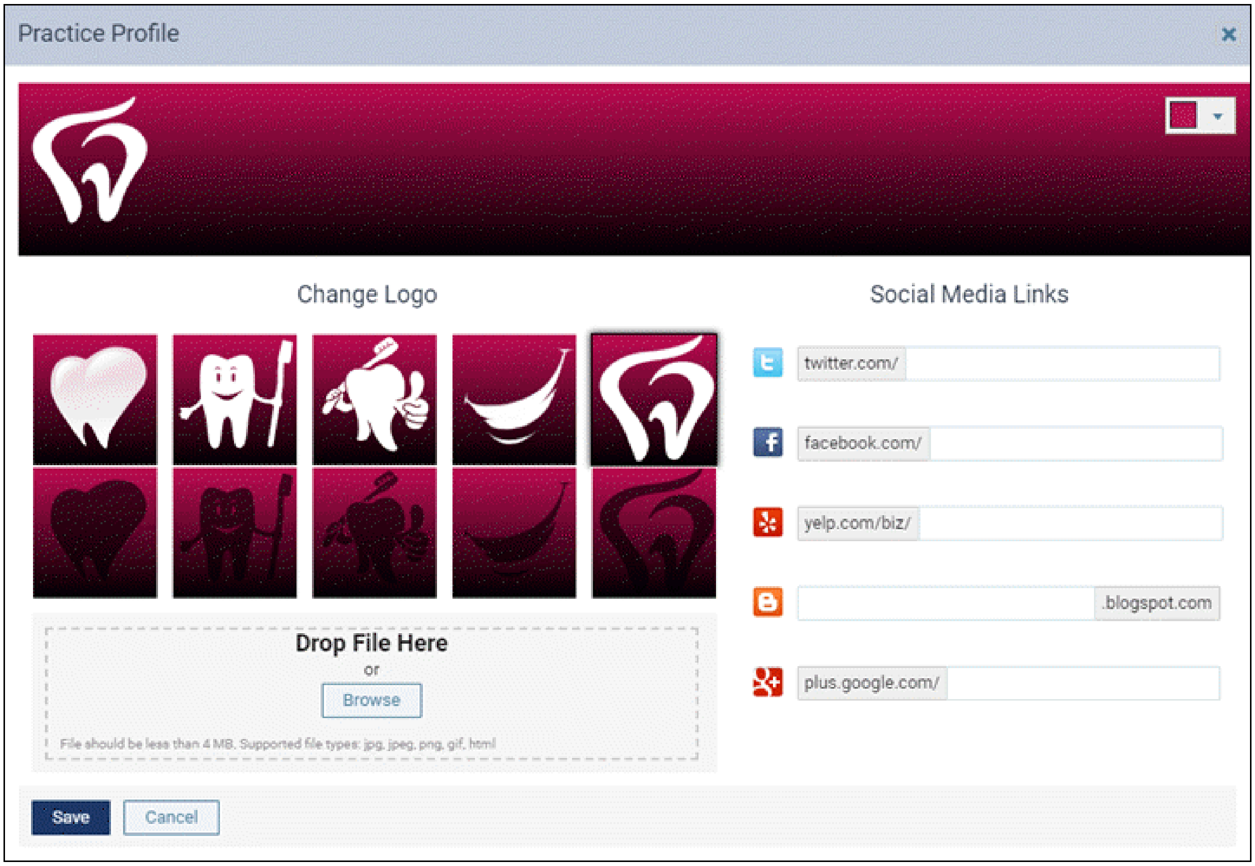
When tag restriction rules are in place, mandatory tags are Primary Tags. Where tag restriction rules are turned off, the first tag added is the Primary tag. All additional or optional tags are Secondary Tags. When there are multiple secondary tags, they are all included as comma-separated values within 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.



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 Dentrix 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