

DENTRIX ASCEND

Release Notes: August 11, 2022 (Prod 396)

Release 396 introduces the insurance credit card payment method to Dentrix Ascend. A new power report allows you to see aged receivables for multiple locations in one place. There are several enhancements to the Imaging module.

Insurance

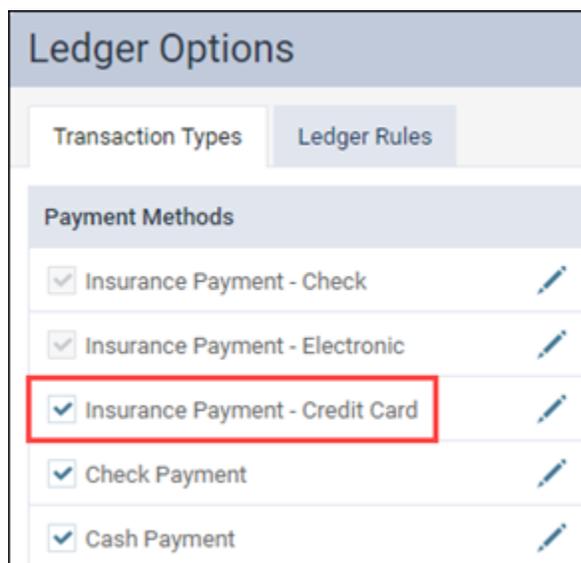
Insurance Credit Card Payment Method

Dentrix Ascend now allows you to enter insurance payments by credit card and to distinguish this type of payment from other insurance payment types. In your workflows, an insurance credit card payment will be just another payment type. If you have implemented additional steps to track this type of payment, you will no longer need to do so.

In this first phase of the feature, there is no integration with third parties to process the credit card payment. Until we implement that portion of this feature, follow the workflow established between your practice and your merchant account to get the money into your bank account.

Enabling the Payment Type

Before you can select **Insurance Payment - Credit Card** as the payment method, you must first enable that payment type on the Ledger Options page. A user with the **Manage ledger options** right can open the **Settings** menu and select **Ledger Options**. Under **Transaction Types**, select the check box next to **Insurance Payment – Credit Card**.



Ledger Payments

Once the payment type is active, you may select it as a payment method and optionally enter a value in the new **Transaction ID** field. The Transaction ID can be helpful in distinguishing between multiple payments of the same type during the same day.

Enter Payment (-)

Transaction date *
08/02/2022

Amount *
\$ 127.52

Method *
Please select...
Please select...
Insurance Payment - Check
Insurance Payment - Electronic
Insurance Payment - Credit Card
Check Payment

Payments of this type are clearly labelled on the Ledger page just like other payment types.

Transaction Date	Modified Date	Patient	Code	Description	Provider	Amount	Running Balance
08/02/2022	08/02/2022	Annette Abbott	Pay	Insurance Payment - Credit Card \$127.52		-127.52	762.48
08/02/2022	08/02/2022	Annette Abbott	Adj	Insurance Adjustment \$195.00	(A)	-195.00	567.48

Bulk Insurance Payments

The same payment method behavior is true of the Bulk Insurance Payment utility.

Create New Bulk Insurance Payment

Setup steps: Payment Information Select Claims Summary

Carrier name *
Blue Cross Blue Shield of Massachusetts

Payment date *
08/02/2022

Amount *
\$ 505.00

Payment method *
Insurance Payment - Credit Card

Transaction ID
7259124568851

Payment Method in Reports

The following reports now reflect insurance credit card payments:

- Payment Analysis
- Day Sheet
- Deposit Slip
- Aged Receivables
- Provider A/R Totals
- Walkout Statement and Billing Statements (activity detail)

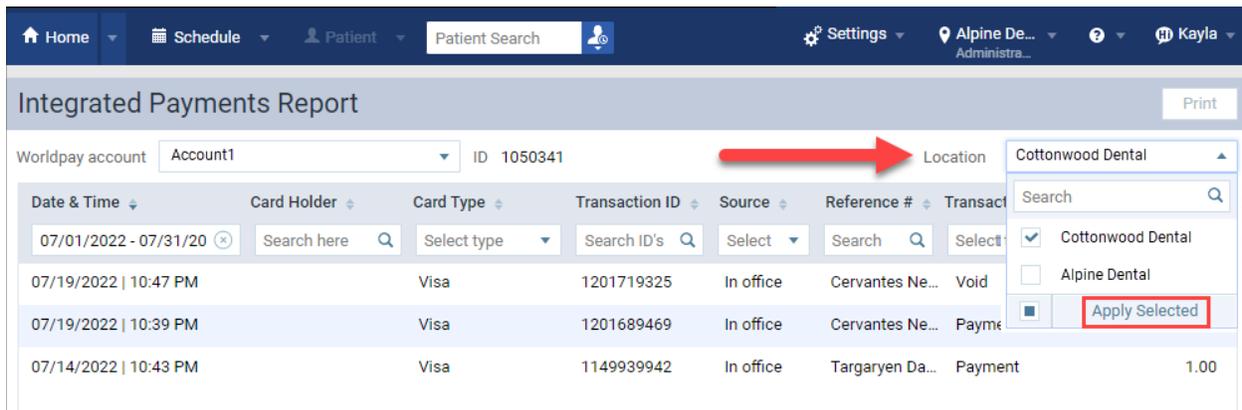
Deposit Slip Report				Print
Nelson & Page Dental Clinic			Transaction date period: 08/02/2022-08/02/2022	
Insurance Credit Card Payments				Collapse rows
Transaction Date →	Patients	Carrier Name	Transaction ID	Amount
▼ 08/02/2022		Ameritas Life Insurance Corp	8315638604179	127.52
	Annette Abbott			127.52
▼ 08/02/2022		Delta Dental of Michigan	7259124568851	505.00
	Jacob Allred			96.00
	Kurt Bruce			205.00
	Olivia Sutherland			204.00
2 items				Total 632.52

Reporting

New Location Filter in the Integrated Payments Report

When you access the **Integrated Payments Report** from the **Home** menu, you first select which Worldpay account you would like to view transactions for. New with this release is the ability to add a secondary filter to sort the report by location.

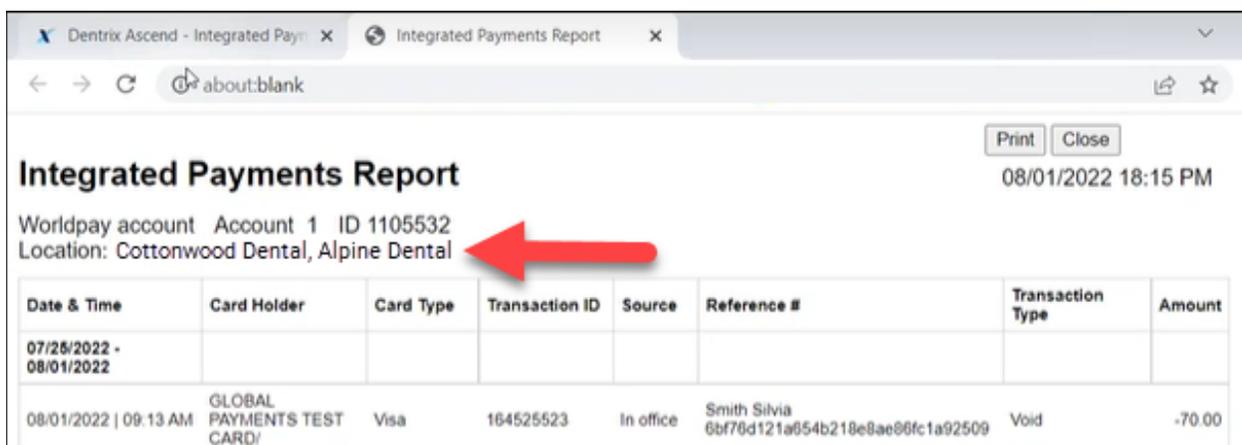
When you expand the Location filter, you are now able to select which locations you would like to see. You can select a specific location, multiple locations, or all locations. Once you select the locations you would like to see, click **Apply Selected**, or simply click anywhere on the page to load the report with the new filter.



The screenshot shows the 'Integrated Payments Report' interface. At the top, there's a navigation bar with 'Home', 'Schedule', 'Patient', and 'Patient Search' fields. Below that, the report title 'Integrated Payments Report' is displayed. The 'Worldpay account' is set to 'Account1' with ID '1050341'. A red arrow points to the 'Location' dropdown menu, which is currently set to 'Cottonwood Dental'. The dropdown menu is open, showing a search bar and two options: 'Cottonwood Dental' (checked) and 'Alpine Dental' (unchecked). The 'Apply Selected' button is highlighted with a red box. Below the dropdown, a table of transactions is visible with columns for Date & Time, Card Holder, Card Type, Transaction ID, Source, Reference #, and Transaction Type.

Please note that you will only see locations that you have access to. If you do not have access to all locations in your organization, you will see an information icon informing you that some locations are hidden from the Location list.

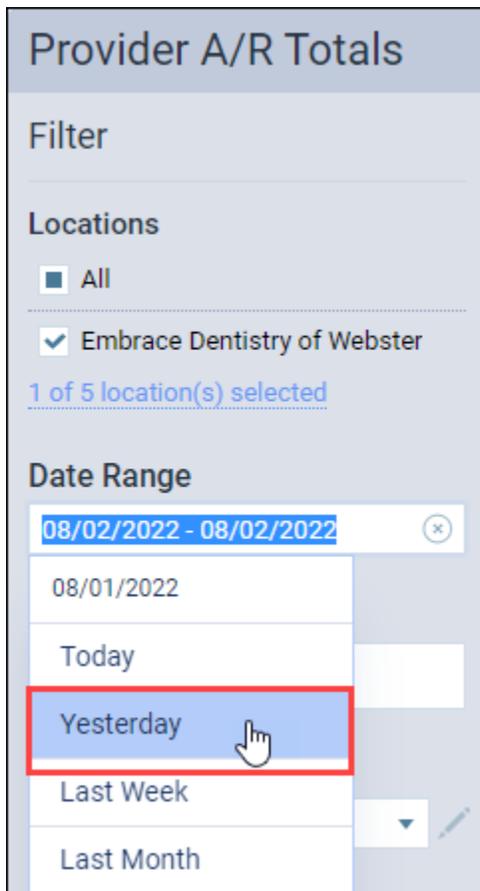
The printed version of the report has also been enhanced to list the Locations included at the top of the report.



The screenshot shows the printed version of the 'Integrated Payments Report'. At the top, there are 'Print' and 'Close' buttons. The report title 'Integrated Payments Report' is displayed, followed by the date and time '08/01/2022 18:15 PM'. Below that, the 'Worldpay account' is 'Account 1' with ID '1105532'. The 'Location' is listed as 'Cottonwood Dental, Alpine Dental', with a red arrow pointing to this text. Below the location information, a table of transactions is visible with columns for Date & Time, Card Holder, Card Type, Transaction ID, Source, Reference #, Transaction Type, and Amount.

New Date Range Option for Provider A/R Totals Report

As a matter of convenience, the Provider A/R Totals report now includes **Yesterday** as a predefined date range choice.



Provider A/R Totals

Filter

Locations

All

Embrace Dentistry of Webster

[1 of 5 location\(s\) selected](#)

Date Range

08/02/2022 - 08/02/2022

08/01/2022

Today

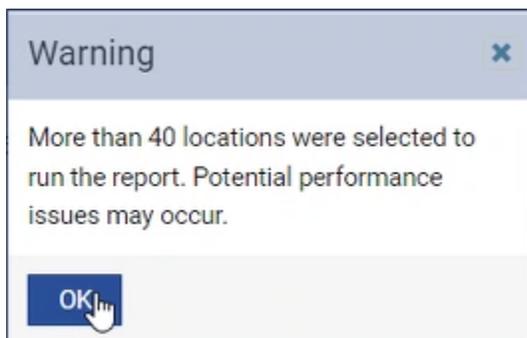
Yesterday

Last Week

Last Month

Alert for Aged Receivables Report

If your user account has access to *40 or more locations*, when you go into the Aged Receivables report, you will now find that the **Include Summary** option is disabled. You will also see a warning if you run a report for more than 40 locations. It is just a warning; the report will run once you acknowledge the warning.



Warning

More than 40 locations were selected to run the report. Potential performance issues may occur.

OK

Power Reporting

Multi-Location Aged Receivables Report

With this release, you can now see aged receivables data for multiple locations with the new **Multi-Location Aged Receivables** report. This report allows you to see outstanding credits or receivables by guarantor. The report shows subtotals for each location and a grand total for all included locations.

		Aging				
Location	Primary Guarantor	61-90	91-120	>120	Unapplied Credits	Grand Total
		Amount	Amount	Amount	Amount	Amount
	Woodruff, Richard	-	-	\$100.00	-	\$100.00
	Woods, Mike	-	-	\$354.00	-	\$354.00
	Woods, Cory	-	-	\$175.40	-	\$175.40
	Woods, Jean M	-	-	\$0.00	-\$140.00	-\$140.00
	Woodward, Patricia A	-	-	\$205.00	-\$206.00	-\$1.00
	Woodward, Kristin	-	-	\$0.00	-\$50.00	-\$50.00
	Xu, Amy	-	-	\$0.00	-\$0.30	-\$0.30
	Zimmerman, Susan	-	-	\$233.40	-	\$233.40
Cottonwood Dental Total		\$239.00	-	\$225,612.70	-\$26,666.33	\$199,185.37
Grand Total		\$4,296.60	\$259.00	\$275,918.88	-\$30,788.38	\$249,686.10

Please note that you will only be able to see aged receivables information for locations that you have access to. You can verify which locations you have access to by clicking the **Settings** menu and selecting **User Accounts**. Then, verify the location on the **User Roles & Locations** tab.

User role *	Location *	Default Operator
Administrator	Alpine Dental LLC	-Select-
Administrator	Cottonwood Dental Sales	-Select-

Date Field Naming Improvements

As part of the effort to bring more clarity to field naming conventions, the following changes were introduced to fields whose names were simply "Date":

- The Analysis Patient Report Builder Date of Birth **Date** field is now **Date (DOB)**
- The Patient Insurance Coverage Start **Date** field is now **Date (Cov. Start)**
- The Patient Insurance Coverage End **Date** field is now **Date (Cov. End)**

Power Reporting > Patient Insurance ★

< > | [Icons] | [Refresh] [Settings]

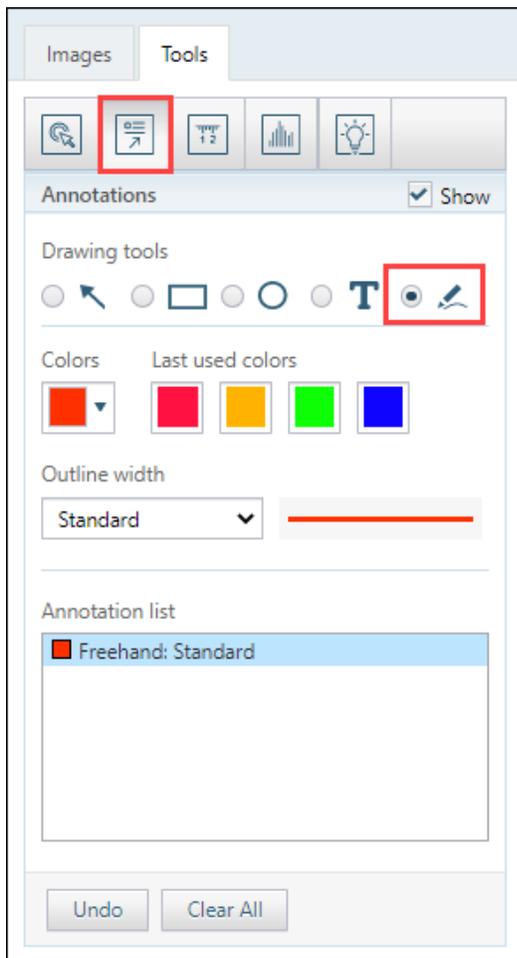
> 1 Filter

Insurance Plan	Plan Address	Patient	Date (Cov. Start)	Date (Cov. End)
1F6C814A	1932 Wynnton Road, Columbus, G...	Dickinson, Sandy	12/17/2014	10/30/2017
		Barry, Isaac	12/10/2020	06/30/2021
		Bennett, Michael	01/01/2021	02/01/2021

Imaging

Freehand Drawing Annotation

Included in this release is the new Freehand Drawing tool in the Imaging module. This feature is available on the Tools tab as another type of annotation. The free hand drawing tool gives dentists the ability to draw on images in the image viewer so they can quickly notate a finding.



Note: The original image is saved and is not altered when an annotation is added.

To begin using the freehand annotation tool, click the **Annotations** category from the Tools tab, and select the **freehand drawing** option. Click and drag on the image where you want to draw. When you release the left mouse button, the drawing operation stops.

Freehand drawing shares the same functionality as the other annotation tools, such as colors, outline width, and the ability to undo and clear all. Freehand annotations also use the same workflow for all other annotation actions, such as exporting images.

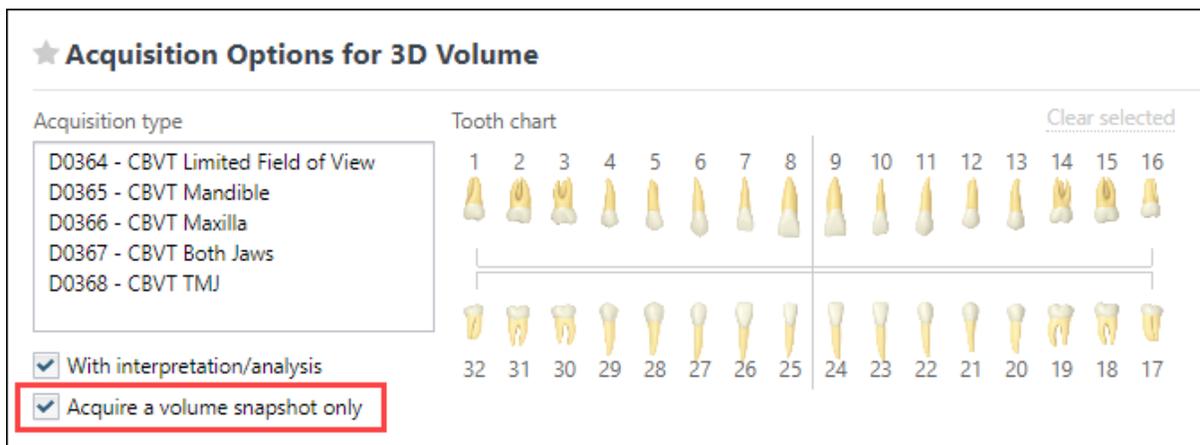
Snapshot Enhancements

There are multiple enhancements to the Snapshot feature with this release.

The choice to **Acquire a volume snapshot only** has been added under the Acquisition type to allow you to capture a snapshot of a 3D volume procedure so that you can attach it to an insurance claim. This feature will only appear when you update the acquisition agent and if the device supports it.

When you select the **Acquire a volume snapshot only** check box, it is important to understand that you will only acquire a volume snapshot instead of getting the full 3D CBCT volume acquisition. To acquire the full volume, clear this check box; you can capture a 2D snapshot of the volume later.

Note: By default, the **Acquire a volume snapshot only** check box is selected. Also, Dentrax Ascend remembers the state of this check box for future 3D volume images.



With this release, other Snapshot enhancements are included to supply more feedback during the snapshot process:

- Added a spinning indicator and green check/error icon to header when taking the snapshot.
- Added a "Snapshot Upload Succeeded" message to the header with a Dismiss option. This message automatically disappears after a few seconds.
- Added a red error dialog box with a message, "The snapshot upload failed. Please check your internet connection." when an upload fails.

New 3D Software Bridge

In this release, Dentrax Ascend has added the Vatech Ez 3D-i software bridge as a choice for acquiring 3D images when you select 3D volume under Imaging Procedures.

User Rights

No new user rights were introduced in this update.

New Learning Content

The Education Team continuously adds to and updates content in the Dentrix Ascend Resource Center. Below are the latest videos. Click the title to get more information about these topics.

Essentials Videos

[Patient Forms Overview](#)

Dentrix Ascend provides an online portal where patients can complete questionnaires and consent forms. You decide which forms are sent to your patients. When a patient completes a form, Dentrix Ascend automatically saves it to the patient's Document Manager.

[Scheduling an Event](#)

Office events should be scheduled just like you schedule appointments. Dentrix Ascend allows you to schedule an event as easily as you would an appointment. Find out how to block out intervals of time in your Calendar for staff meetings, vacation schedules, operatory repairs, and more.

[Updating Patient Preferences](#)

Patients give us so much information about their schedules and preferences. Wouldn't it be nice to note that this patient prefers Monday and Wednesday mornings and would like a text message? Dentrix Ascend allows you to record these patient preferences and more.

Webcast

[New Resource Center Webcast](#)

The Practice Education team is excited to introduce the new and improved Dentrix Ascend Resource Center. Watch a short (10-minute) recording for a full overview of this valuable resource.