



Release Notes: June 7, 2022 (Beta 393)

The product update released June 07, 2022, introduces sorting capability to the Unsent Claims page. There are insurance enhancements to Patient Letters and several updates to Power Reporting. Additionally, several pages now reflect name changes to insurance claim status.

Insurance

Claim Status Name Changes

This release includes name changes that appear on the Claim Detail window and related claim reports. Column headers and claim statuses with the name **NEA** have been changed to **Attachment**. These name changes are to increase clarity and do not change any functionality.

The column header name in the Attachments tab of the Claim Detail has changed from NEA # to **Attachment ID**.

<input type="checkbox"/>	Document Name	Classification / Type	Size	Date Attached	Attachment ID
<input type="checkbox"/>	06/01/2022 - Intraoral Periapical Image (1)	X-RAY	108.8 KB	06/01/2022	

393_attachment_ID.png

Additionally, the status name **NEA Hold** has changed to **Attachment Hold** and the status name **NEA Error** has changed to **Attachment Error** on the following pages:

- Sent Claims
- Unresolved Claims
- Insurance Claims
- Predetermination Requests

Insurance Claims								Include predeterminations	On
Patient	Service Date	Created On	Amount	Claim Type	Subscriber	Carrier	Att.	Status	
Isaac Chiltepin	02/15/2021	02/15/2021	\$1,200.00	Secondary	Isaac Chiltepin	MetLife	Old name	NEA Hold	
06/30/2021 2:46 PM kbowman Claim submitted									

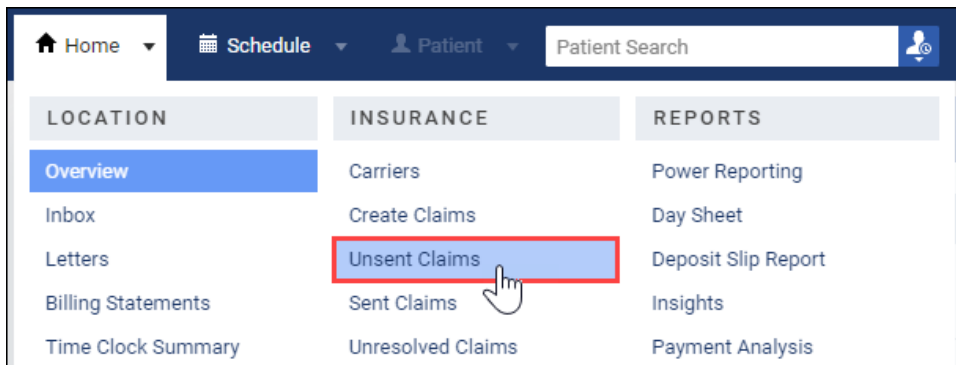
393_nea_old_name.png

Insurance Claims								Include predeterminations	On
Patient	Service Date	Created On	Amount	Claim Type	Subscriber	Carrier	Att.	Status	
Isaac Chiltepin	02/15/2021	02/15/2021	\$1,200.00	Secondary	Isaac Chiltepin	MetLife	New name	Attachment Hold	
06/30/2021 2:46 PM kbowman Claim submitted									

393_attachment_new_name.png

Sorting Capability on the Unsent Claims Page

This release introduces sorting capability for the Unsent Claims page accessed from the Home menu.



[Image: 393_home_unsent_claims.png]

By default, the Unsent Claims page is now sorted by Service Date from oldest to newest. Click any column heading to re-sort the list by that heading.

If you choose to sort the list by **Patient Name** or **Subscriber**, the list will be sorted alphabetically by the patients' or subscribers' last names.

Unsent Claims								
Send Selected Claims		READY	WARNING	NEEDS ATTENTION				
<input type="checkbox"/>	Patient Name	Service Date	Created On	Claim Type	Subscriber	Carrier	Amount	Att.
<input type="checkbox"/>	Jeanie W Johnson	05/03/2022	05/31/2022	Primary	Jeanie W Johnson	Blue Cross Blue Shield of Texas	1,050.00	⚠
<input type="checkbox"/>	John Alexander	05/10/2022	05/31/2022	Primary	John Alexander	Blue Cross Blue Shield of Texas	1,493.00	⚠
<input checked="" type="checkbox"/>	William Andrews	05/17/2022	05/31/2022	Primary	William Andrews	Blue Cross Blue Shield of Texas	160.00	
<input checked="" type="checkbox"/>	Mimi Bentley	05/31/2022	05/31/2022	Primary	Mimi Bentley	Delta Dental of Illinois	730.00	
<input checked="" type="checkbox"/>	Candice Bentley	05/31/2022	05/31/2022	Primary	Candice Bentley	Delta Dental of Illinois	397.00	
<input checked="" type="checkbox"/>	Jane Bentley	05/31/2022	05/31/2022	Primary	Candice Bentley	Delta Dental of Illinois	190.00	

[image: 393_unsent_claims_sorting.gif]

Note: Unsent Claims can be managed from two places in Ascend: 1) **Overview > Unsent Claims widget** and 2) **Home > Unsent Claims**. This release introduces sorting capability only on the Unsent Claims page accessed from the Home menu.

Patient Information

Update to Insurance Plan Information in Letter Templates

Ascend comes with a set of letter templates that you can use to generate letters for your patients. These templates are made up of text—which stays the same for all patients—and placeholders—which display patient-specific information when the letter is generated for a patient. This release introduces an enhancement to one of the placeholders for insurance information.

In the past, Dentrix Ascend could only show a primary insurance plan in the **Year End Treatment (With Insurance)** letter template. This caused issues when you tried to generate a letter for a patient who did not have an active primary insurance plan.

The screenshot shows the 'Letters' editor interface. On the left is a sidebar with a list of letter templates, including 'Year End Treatment (With Insurance)'. The main area shows a text editor with a toolbar (Formats, Verdana, Font Sizes, Merge fields) and a text area containing the following placeholders and text:

[Current_Date]

[Patient_First_Name] [Patient_MI] [Patient_Last_Name]

[Patient_Address]

[Patient_Address_2]

[Patient_City], [Patient_State] [Patient_Zip]

Hi [Patient_First_Name],

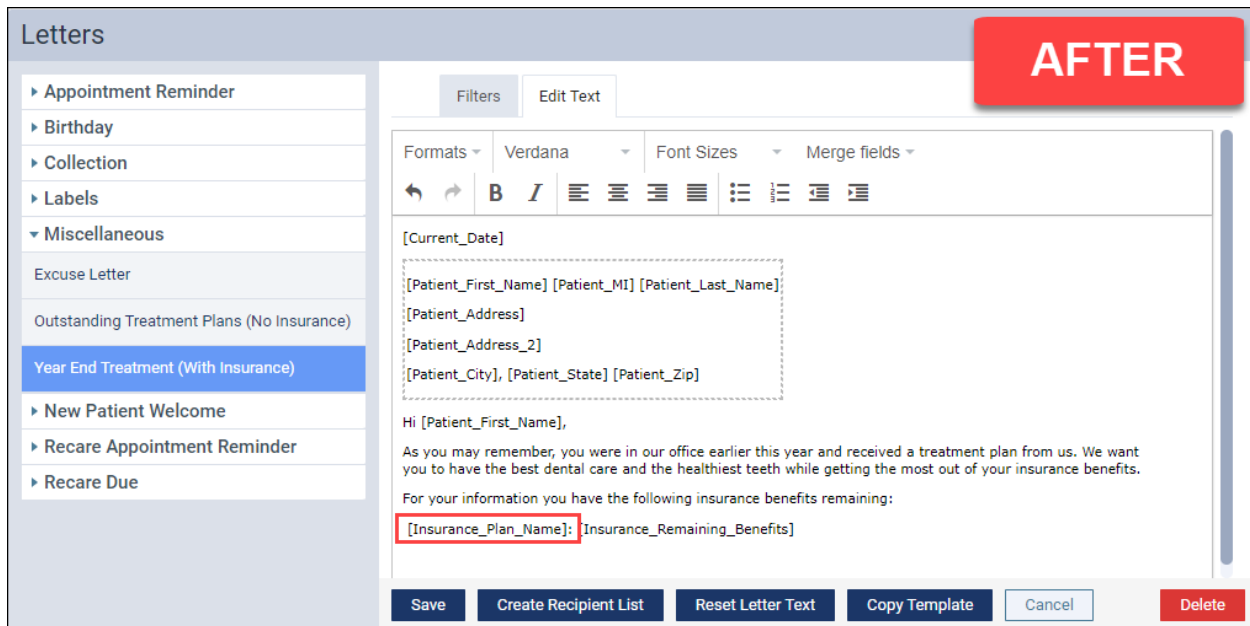
As you may remember, you were in our office earlier this year and received a treatment plan from us. We want you to have the best dental care and the healthiest teeth while getting the most out of your insurance benefits. For your information you have the following insurance benefits remaining:

[Primary_Insurance_Plan_Name]: Primary_Insurance_Remaining_Benefits

At the bottom of the editor are buttons for 'Save', 'Create Recipient List', 'Reset Letter Text', 'Copy Template', 'Cancel', and 'Delete'. A red 'BEFORE' label is overlaid in the top right corner.

[image:393_insurance_placeholder_before.png]

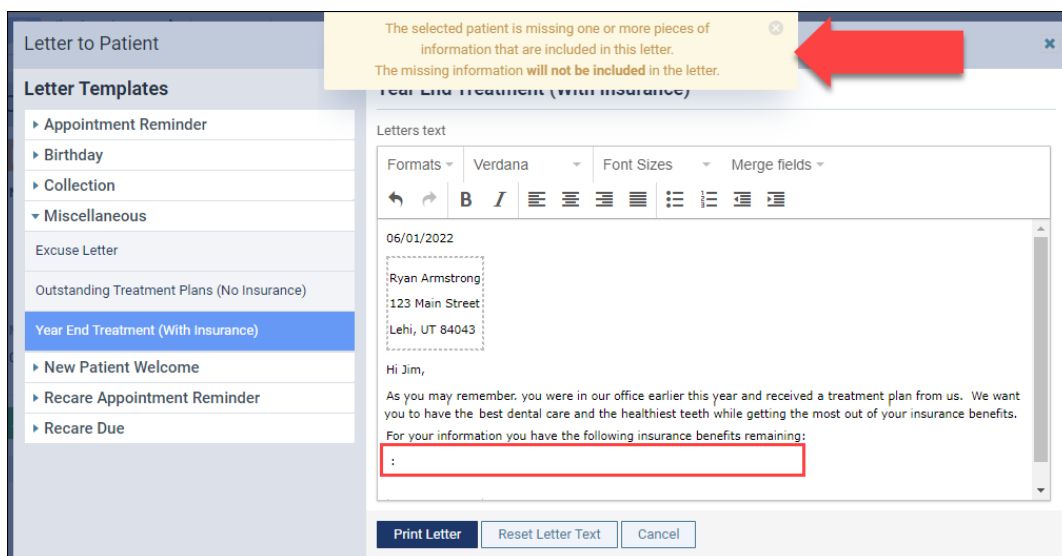
This has been corrected so that this placeholder will now show a patient's active insurance plan—whether that plan is primary, secondary, or tertiary.



[image:393_insurance_placeholder_after.png]

The following examples outline how the **Insurance_Plan_Name** placeholder behaves in different situations:

- **Example 1:** If the patient has an active primary insurance plan and an active secondary insurance plan, the placeholder will show only the primary insurance information.
- **Example 2:** If the patient has an inactive primary insurance plan and an active secondary insurance plan, the placeholder will show only the secondary insurance information.
- **Example 3:** If the patient has no active insurance plans, the insurance information will be blank, and you will see an error message: “The selected patient is missing one or more pieces of information that are included in this letter. The missing information **will not be included** in the letter.”



[Image: 393_no_insurance.png]

Power Reporting

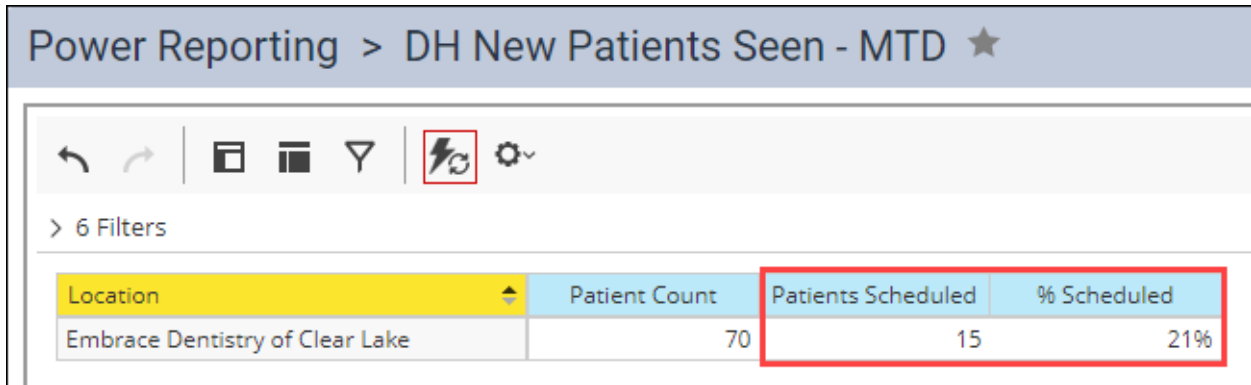
Automated Custom Report Update Process

In previous releases when we notified you of field changes, we advised that you might need to revisit your custom reports and update them to remove obsolete fields or make use of new field versions. Going forward, Dentrix Ascend will automatically make those field updates for you.

New Patient Follow-Up Appointment Scheduled KPI

Two of the Daily Huddle (DH) New Patients Seen reports now have added measures which allow you to see, at a high level, how many of your new patients left with a follow-up appointment scheduled. If this is an important KPI for your practice, you will find these useful.

The enhanced reports are **DH New Patients Seen – Yesterday** and **DH New Patients Seen – MTD**. The new columns are Patients Scheduled and % Scheduled.



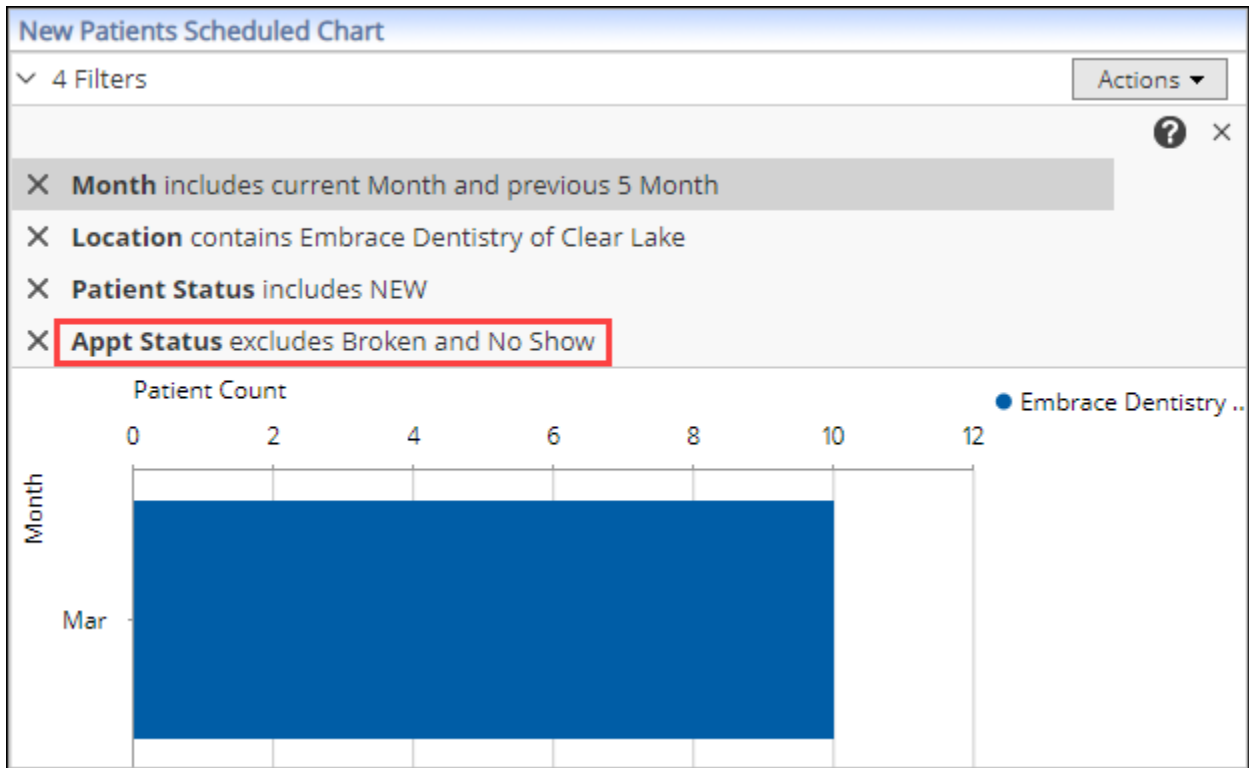
The screenshot shows a Power Reporting interface for the report 'DH New Patients Seen - MTD'. The table displays data for 'Embrace Dentistry of Clear Lake'. The 'Patients Scheduled' and '% Scheduled' columns are highlighted with a red box.

Location	Patient Count	Patients Scheduled	% Scheduled
Embrace Dentistry of Clear Lake	70	15	21%

[image:393_new_patients.png]

Enhanced Scheduled Production Reports

The Daily Huddle and Scheduled Production reports have been enhanced to provide more realistic estimates of scheduled production. The enhancement is the addition of an appointment status filter. The filter excludes broken or cancelled appointments, so they do not incorrectly contribute to the sum.



[image:393_no_broken.png]

Current Insurance Estimates Added to the Ledger Report Builders

Every time you post a procedure for a patient, Dentrix Ascend attempts to calculate the primary and secondary insurance estimates, the write-off amount, and the guarantor estimate for that procedure. You can see these values in the expanded transaction history of the Ledger.

03/29/2022	03/29/2022	Annette Abbott	D0220	Intraoral Periapical Images	Dr.L	28.00	1,105.00
History for Transfer of Responsibility							
	03/30/2022	Annette Abbott	Xfer for D0220	Outstanding (Estimated)			
				Prim. Ins Portion	Sec. Ins Portion	Write-off	Guar. Portion
				16.00 (+16.00)		12.00 (+12.00)	0.00 (-28.00)
							Total Amount
							28.00

[image:393_ledger_estimates.png]

New estimate fields have been added to the Analysis Ledger Report builder under Measures to help you capture the values calculated on the ledger, to the effect that you could see the estimates for all your ledgers in one report.

Power Reporting > Analysis Ledger Report Builder ★

Available fields (135) for: Ledger

Find: X View ▾

> 1 Filter

Patient	Proc. Code	Proc. Description	Guar. Portion (Est)
Abbott, Annette	D0220	Intraoral Periapical Images	\$0.00
	D0274	Bitewing Four Images	\$0.00
Abbott, Ashley	D0220	Intraoral Periapical Images	\$0.00
Abbott, Cheryl	D0220	Intraoral Periapical Images	\$151.00
Abbott, Christal	D0220	Intraoral Periapical Images	\$28.00

Measures:

- Guar. Portion (Est)
- Prim. Ins. Portion (Est)
- Sec. Ins. Portion (Est)
- Write-off (Est)

[image:393_estimate_fields.png]

IMPORTANT: You cannot use these fields to see historical information. They are only a snapshot of the current state of the Ledger and always reflect the most recent modifications.

User Rights

No new user rights were introduced in this release.

New and Updated Learning Content

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

[Acquiring Images in Offline Mode](#)

When the Internet is down but you need to acquire images, the Dentrix Ascend Imaging module includes an offline mode for you acquire images and then synchronize the offline image with your online database when your internet connection has been restored. Watch this video to learn how to acquire offline images in offline mode.

[Adding a New Patient Record](#)

One of the most fundamental tasks you do is adding a new patient record, and Dentrix Ascend makes the process easy. When adding a patient record, Dentrix Ascend automatically searches existing patients to help prevent you from adding a duplicate record for a patient that is already in your database.