

Practice Success



3 Keys to Effectively Communicate with Your Patients Using Dentrix Ascend



Presenter Introduction

Jo Lowery

- Over 33 years of experience in the dental field.
- Certified trainer for Henry Schein since 2011.
- Awarded Dentrix Ascend Trainer of the Year in 2017.
- Loves the fact that Ascend is molded and shaped by our customers: our most valuable asset!



In this webinar:



Key 1: Appointment and Recare Notifications



Key 2: Custom eStatements



Key 3: Two-Way Text Messaging



Creative Uses of Patient Communication Tools



Key 1: Appointment and Recare Reminders

Customize automated email and text messages for patient appointments and recare

Benefits of Appointment & Recare Reminders



Be thoughtful about how and when you communicate with patients



Improve patient satisfaction by offering convenient contact methods



Improve office efficiency by making fewer phone calls



Save money by working with native Ascend features

Appt & Recare Reminders: Where to Find It

From the **Settings** menu, select **Patient Communications**.





Tip

Take a Tour

When you visit the Patient Comms page, a tour pops up which shows how to edit an existing reminder.

- Check the box to hide the tour.
- Click the Help icon (?) to access the course at any time.

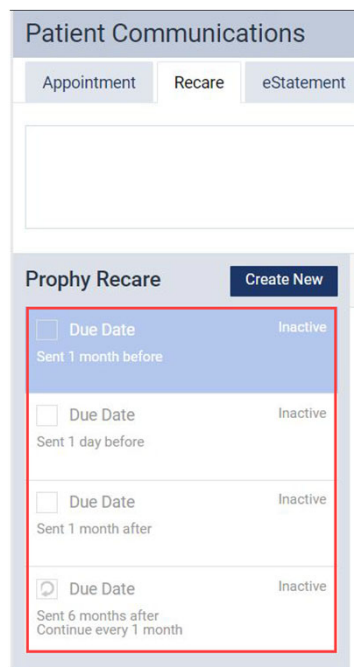
The screenshot shows the 'Patient Communications' page in Dentrix Ascend. A 'Patient Communication Feature Tour' window is open, displaying a calendar and a list of appointment reminders. A red arrow points to a help icon (?) in the top right corner of the interface. The tour includes a 'Sample Text Message' editor and a 'Start Tour' button.

Dentrix Ascend comes with some reminders; you can customize which ones to turn on.

- 9 default appointment communications

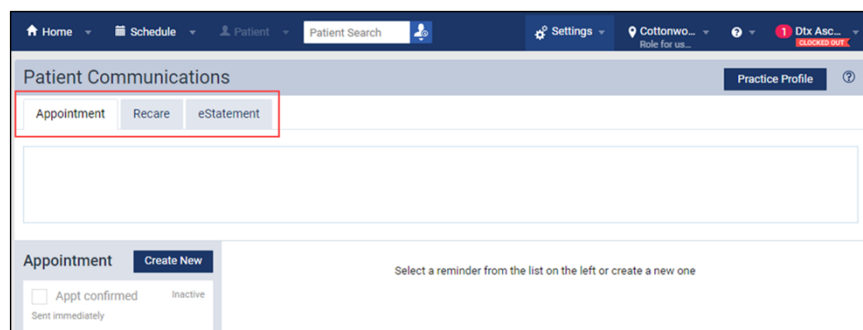
The screenshot shows the 'Patient Communications' page in Dentrix Ascend. A list of appointment reminders is displayed, with a red box highlighting the list. The reminders include 'Appt confirmed', 'Appt scheduled', 'Appt confirmed', 'Appt start', 'Appt start', 'Appt start', 'Appt completed', 'Appt broken', and 'Appt no show'. The 'Appt confirmed' reminder is selected, and its details are shown in the 'View Reminder' pane on the right.

- 4 default recare communications



Appt & Recare Reminders: 3 Tabs

- There are 3 tabs on the Patient Comms page.
- Set-up is similar for Appointment and Recare reminders.
- eStatements are a little different and will be covered in the next section.



Appt & Recare Reminders: Customizing Existing Reminders

Create from scratch by clicking **Create New** (A).

OR

Customize by:

- Selecting a communication (B)
- Clicking **Edit** (C).



Tip: When you select a communication, you can preview the email and text messages.

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Notification Schedule

1. Choose when the message will be sent.
2. Choose the action that triggers the message.
3. Click **Next**.

Optional

- Exclude automated message.
- Include a Premedicate message.
- Include ability to confirm.
- Set up reoccurrence.

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Preferred Sending Method

- Choose whether you want the communication sent by email or text.
- If patients don't have valid info for the preferred method, Ascend sends the message using the alternative method.

The screenshot shows the 'Edit Reminder' screen. On the left, there's a sidebar with appointment types: 'Appt confirmed', 'Appt start', and 'Appt no show'. The main area is titled 'Edit Reminder' and has a breadcrumb trail: 'Notification Schedule' > 'Preferred Sending Method' > 'Email Message' > 'Text Message' > 'Practice Info'. A note says: 'This reminder is set to send 2 days before the appointment is started with the ability for the patient to confirm. Text is the preferred sending method for this reminder.' The 'Preferred sending method' section has radio buttons for 'Email' and 'Text', with 'Text' selected. A red box highlights this section and the text below it: 'If patient does not have a valid text number, we will attempt to send via email message.' At the bottom, there are 'Back', 'Next', 'Cancel', and 'Delete' buttons. The 'Next' button is highlighted with a red box.

Note: Remember to gather missing contact information through the task in the routing panel.



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Tip

Patient's Preferred Contact

- The Preferred Contact Method on the Patient Information page does NOT override the Preferred Sending Method in Patient Communications.
- If a patient opts out of receiving text messages, Ascend will only send an email communication.

The screenshot shows the 'Patient Information' page for 'Candice Bentley'. The 'Preferred Contact Method' section is highlighted with a red box. It has radio buttons for 'Call me', 'Text me', and 'Email me'. 'Text me' is selected, and the phone number 'M (801) 555-2526' is shown next to it. Other sections include 'Preferred Appointment Day/Time' with checkboxes for 'Any', 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. 'Monday' and 'Wednesday' are checked. There are also sections for 'Preferred Language' (set to English) and 'Preferred Location' (set to Cottonwood Dental).

Email Message

1. Customize the email subject line.
2. Type any custom text that you want to add to the end of the automated email message.

Important: If you chose to exclude the automated message, the message will contain only your custom message.

Appointment **Create New** Edit Reminder Active Off

Setup steps: Notification Schedule Preferred Sending Method **Email Message** Text Message Practice Info

This reminder is set to send 2 days before the appointment is started with the ability for the patient to confirm. Text is the preferred sending method for this reminder.

Email message

Subject * **1**
Cottonwood Dental Appointment Reminder

Automated message **1**

Hi Steph,
Remember that you and Addy have dental appointments **Friday, June 3**
Steph at 3:27 PM.
Addy at 3:57 PM.
We look forward to seeing you soon.

Custom message **2**

Paragraph Verdana Font Sizes

← Back **Next →** Cancel Delete

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Tip

Automated Message vs Custom Message

- Patient names and appt. times are inserted into the automated message.
- You cannot change the content or formatting of the automated message.
- If you choose to exclude the message, Ascend will require you to add a custom message.

Setup steps: Notification Schedule Preferred Sending Method **Email Mes...** Text Mes... Practice Info

This reminder is set to send 7 days before the appointment is started with the ability for the patient to confirm. Text is the preferred sending method for this reminder.

When would you like to send the notification?

Appointment reminder is based on *

7 + - days After Before Appointment Start Date and Time

Exclude automated message **On** Include Premedicate message on Email **On** Ability to confirm **On**

Setup steps: Notification Schedule Preferred Sending Method **Email Mes...** Text Mes... Practice Info

This reminder is set to send 7 days before the appointment is started with the ability for the patient to confirm. Text is the preferred sending method for this reminder.

Email message

Subject *
Cottonwood Dental Appointment Reminder

Custom message * **2**

Paragraph Verdana Font Sizes



Tip

Automated Message vs Custom Message

- **Option 1:** You can use only the automated message.
- **Option 2:** You can add a custom message to the end of the automated message
- **Option 3:** You can exclude the automated message and create a completely custom message.

Option 1	Automated Message
Option 2	Automated Message + Custom Message
Option 3	Custom Message

Text Message

- Type any custom text that you want to add to the end of the automated text message.

The screenshot shows the 'Edit Reminder' interface with the following elements:

- Appointment List:**
 - Appt confirmed (Sent immediately) - Inactive
 - Appt start (Sent 7 days before) - Inactive
 - Appt start (Sent 2 days before) - Inactive
 - Appt start (Sent 2 hours before) - Inactive
 - Appt no show (Sent 1 hour after, Continue every 1 month) - Inactive
- Edit Reminder Header:** Active Off
- Setup steps:** Notification Schedule > Preferred Sending Method > Email Message > **Text Message** > Practice Info
- Text message section:**
 - Automated message: From Cottonwood Dental: Steph - Remember that you and Addy have dental appointments Friday, June 3 starting at 3:27 PM. (801) 555-1234
 - Custom message:** Type here to enter custom message (highlighted with a red box)
- Navigation:** Back, **Next** (highlighted with a red box), Cancel, Delete

Practice Info

- Your practice's information is included at the bottom of email and text communications.
- You can click **Practice Profile** to update the logo, colors, and social media links.
- Click **Done** to save any changes that you have made on any of the tabs.

The screenshot shows the 'Patient Communications' interface. At the top right, the 'Practice Profile' tab is highlighted with a red arrow and a red box. Below this, there are tabs for 'Appointment', 'Recare', and 'eStatement'. The 'Appointment' tab is selected, showing a list of appointment reminders with options like 'Appt confirmed', 'Appt start', and 'Appt no show'. To the right, the 'Edit Reminder' section is visible, with a 'Practice Info' section containing a logo and contact information for 'Cottonwood Dental'. At the bottom, there are buttons for 'Back', 'Done' (highlighted with a red box), 'Cancel', and 'Delete'.

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Appt & Recare Reminders: Activating Reminders

- Make the communication active by turning on the Active switcher.
- Active communications show across the top of the screen in relation to the appointment day.



Tip: Leave the communication **Off** while you are making changes. Turn it **On** when you have finalized the options.

The screenshot shows the 'Patient Communications' interface with the 'View Reminder' tab selected. A red box highlights the 'Active' switcher, which is turned 'On', with a red arrow pointing to it. A red circle with the letter 'A' is placed over the 'Active' switcher. Another red circle with the letter 'B' is placed over the '7 days' and 'Appt Day' tabs. The 'View Reminder' section shows a sample email message and a sample text message. At the bottom, there are buttons for 'Edit' and 'Delete'.

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Tip

Communications List

In the left panel, you see a preview of the details of active reminders. You see:

- The action that will trigger the message.
- When the message will be sent.
- The preferred sending method shown as a set of icons.

Appointment
Create New

Appt confirmed

🗨️

Sent immediately

Appt start

🗨️ ✉️

Sent 7 days before

Appt start

🗨️ ✉️

Sent 2 hours before

Appt no show

🗨️ ✉️

1

✉️, 🗨️

Email is preferred.
Text is the alternative.

2

🗨️, ✉️

Text is preferred.
Email is the alternative.



Tip

Online Booking Link in Recare Reminders

For recare reminders, your online booking link is automatically included (if you have online booking turned on).

- **For email messages:** A Book Now button is automatically included.
- **For text messages:** A link to your online booking schedule is automatically included.

View Reminder
Active

This reminder is set to send 1 month before the due date. Text is the preferred sending method for this reminder.

Sample Email Message

Steph and Addy are due for their routine dental visits on 07/15/2022.
Please call (801) 555-1234 to schedule your appointment.
We look forward to hearing from you soon.

Book Now

Cottonwood Dental
123 Main Street
American Fork, UT 84003-0000
(801) 555-1234

Sample Text Message

From Cottonwood Dental:
Steph and Addy are due for their routine dental visits on 07/15/2022.
Book Online: <http://example.com/book-online> or call (801) 555-1234

11



Common Question

**Who receives the reminders?
The patient or the primary contact ?**

- Reminders messages are sent to the **Primary Contact**, even if that contact is a non-patient.
- Communications only get sent out if the patient's status is New or Active.

This screenshot shows the 'Patient Information' page for Jane Bentley. The 'Household' section is highlighted with a red box, showing 'Primary Contact' as Candice Bentley. Other household members listed are Mimi Bentley and Jane Bentley (Self). The 'Financial Responsibility' section also shows Candice Bentley as the Primary Guarantor.

This screenshot shows the 'Basic Info' tab of the 'Patient Information' page for Jane Bentley. The 'Status' dropdown menu is highlighted with a red box and set to 'Active'. Other fields include First name (Jane), Last name (Bentley), Gender (Female), Birthdate (01/01/2019), and Address (123 Main, Pleasant Grove, UT, 84062).



Common Question

How do I know if the communications will go out for a specific patient?

- On the **Patient Information** page, go to the **Basic Info** tab.
- Verify whether the patient has a valid email address or mobile phone number.

This screenshot shows the 'Basic Info' tab of the 'Patient Information' page for Candice Bentley. The 'Status' dropdown menu is highlighted with a red box and set to 'Active'. Other fields include First name (Candice), Last name (Bentley), Gender (Female), Birthdate (12/01/1989), Address (123 Main Street, Lehi, UT, 84042), and Email (candice.bentley@email.com). The phone number (801) 555-2526 is also highlighted with a red box.



Common Question

How do I know whether a patient is subscribed to text messages?

- On the **Patient Information** page, go to the **Preferences** tab.
- Verify whether **Mobile number for text messages** is marked Yes or No.

Home Schedule Patient Candice Bentley Settings Jen Dental 73 Kayla

Patient Information

Basic Info Preferred Contact Method Preferred Appointment Day/Time

Related Patients Call me M (801) 555-1234 Day

Medical Alerts Text me Any

Patient Forms Email me Sunday

Preferences Monday

Referrals Tuesday

Notes Wednesday

Text Messages ⓘ

Mobile number for text messages: (801) 555-1234

Yes No Thursday

Patient Information

Basic Info Preferred Contact Method

Related Patients Call me M (801) 555-1234

Medical Alerts Text me

Patient Forms Email me

Preferences

Referrals

Notes

Text Messages ⓘ

Mobile number for text messages: (801) 555-1234

Yes No 06/06/2022 **Opted Out**



Common Question

Are communications the same for each location in my organization?

- Each location of your organization has its own communication settings.
- Communications include location-specific information
- Communications come from the location, not the organization.

Active off

Setup steps: > Notification Schedule > Preferred Sending Method > Email Message > Text Message > **Practice Info**

This reminder is set to send 7 days before the appointment is started with the ability for the patient to confirm. Text is the preferred sending method for this reminder.

Practice info ⓘ

Email message

Cottonwood Dental
 123 Main Street
 American Fork, UT 84003-0000

Tel.
(801) 555-1234

Text message

Cottonwood Dental
 (801) 555-1234

Appt & Recare Reminders: Security Rights

To perform tasks related to appointment and recare reminders, you must have the following rights:



Review Communications Setup	View appointment reminders, recare reminders, and the eStatement message.
Manage Communications Setup	Edit appointment reminders, recare reminders, and the eStatement message.
Manage Web Profile	Open the Practice Profile dialog box and edit the location profile.



RECAP

Key #1: Appointment and Recare Reminders

Customize your reminders

Create your own reminders for appointments or recare or customize existing reminders.

Control the frequency and method

Chose when messages will be sent and whether they will be emails or text messages.

Craft thoughtful messages

Add a custom message to the automated message or create a fully custom message.



If you have questions, submit them in the question box.

Where to Get Help

Articles

- [Customizing appointment communications](#)
- [Customizing recare communications](#)
- [Customizing your practice profile](#)

Webinars

- [3 Tools to Master Your Recare Workflow](#)





Key 2: Custom eStatements

Customize your eStatements by adding a personalized message to the patient communication

Benefits of Customizing eStatements



Add a personal touch to your eStatements



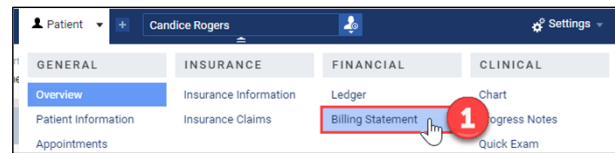
Create a custom message for all patients or a personalized message for a single patient



Give patients directions on how to pay their bill

Sending an eStatement to a Specific Patient

1. From the **Patient** menu, select **Billing Statement**.
2. Configure the Statement start date and Statement view.
3. Customize the statement message.
4. Click the **Actions** menu.
5. Select **Send eStatement only**.
6. Click **Send**.



Statement start date: From last zero balance Guarantor view
 Other Patient view
 Walkout (today only)

Statement message:

Include credit card payment options Include location abbreviation
 Include due date as 07/06/2022

Actions



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4. Click the **Actions** menu.
5. Select **Send eStatement only**.
6. Click **Send**.

Statement start date: From last zero balance Guarantor view
 Other Patient view
 Walkout (today only)

Statement message:

Include credit card payment Add to Patient Connection abbreviation



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Tip

Add a Custom Message to the Statement PDF

- The statement message appears directly on the statement.
- Caution:** Don't put a message intended for one patient on a batch of eStatements.

Billing Statement

Statement start date: Statement view:

From last zero balance Guarantor view
 Other Patient view
 Walkout (today only)

Statement message: i

This statement includes charges for you and your daughter Jane.

Include credit card payment options Include location abbreviation
 Include due date as: 07/02/2022 i

DATE	DESCRIPTION		AMOUNT	BALANCE
01/20/2022	D1110 - Prophylaxis - Adult		99.00	280.00
02/11/2022	D2390 - Anterior Resin Com		434.00	714.00
01/15/2022	Insurance Adjustment \$25.00	Jane Bentley	-25.00	689.00
02/11/2022	Primary dental insurance claim Ace Tomato Co. [\$434.00] Claim status: UNPAID			
04/12/2022	D2740 - Full Porcelain/Ceramic Crown Th: 18	Candice Bentley	1,683.00	
	D4276 - Connective/Double Pedicle Graft	Candice Bentley	0.00	2,372.00
04/14/2022	D2781 - 3/4 Cast Base Crown Th: 16	Candice Bentley	0.00	2,372.00
04/25/2022	D2391 - Posterior Resin Composite 1s Th: 1(M)	Candice Bentley	174.00	2,546.00
(*) = Payments have been split between more than one visit. (**) = Pending insurance payment.				
BALANCE 0-30 DAYS		BALANCE 31-60 DAYS	BALANCE 61-90 DAYS	BALANCE 90+ DAYS
0.00		1,857.00	0.00	689.00
TOTAL BALANCE				2,546.00
ESTIMATED INSURANCE				370.60
PATIENT PORTION				2,175.40

Statement Message

This statement includes charges for you and your daughter Jane.

Reminder: We bill your insurance as a courtesy to you. It is YOUR responsibility to be familiar with your plan coverage, limitations and copays, etc. We advise that you follow-up with your insurance carrier on any claims unpaid after 60 days from date of service. CLAIMS THAT ARE NOT PAID FOLLOWING 90 DAYS FROM DATE OF SERVICE will become patient responsibility for payment AT TIME OF VISIT.

Customizing the eStatement: Where to Find It

- From the **Settings** Menu, select **Patient Communications**.
- Select the **eStatement** tab.

Settings Ctn1-Cottonwood Dent... Kayla

LOCATION	PRODUCTION	PATIENT CARE
Location Hours	Coverage Tables	Clinical Note Templates
Location Information	Fee Schedules	Medical Alerts Library
Patient Forms	Insurance Defaults	Patient Communications
Operatories	Procedure Codes & Conditions	Prescriptions

Patient Communications Practice Profile

Appointment Recare eStatement

eStatement

eStatement Sent after eStatements are generated

View eStatement Message

Information. This message will be sent soon after eStatements have been generated. Email is the preferred sending method for this reminder.

Sample Email Message

Hi Steph,
Thank you for your recent visit to our office. An electronic statement has been generated for you that shows the work performed including your balance.

View Statement

Sample Text Message

From Cottonwood Dental:
Steph -
Thank you for your recent visit to our office. An electronic statement is available here: <https://example.com/estatement-ur/>

Customizing the eStatement: Edit the Message

- A preview of the email and text messages displays in the right panel.
- Click **Edit** to customize the messages.

The screenshot shows the 'View eStatement Message' interface. On the left, there's a sidebar with 'eStatement' and a note 'Sent after eStatements are generated'. The main area is titled 'View eStatement Message' and contains two preview sections: 'Sample Email Message' and 'Sample Text Message'. The email preview shows a message from Jen Dental with a 'View Statement' button. The text message preview shows a similar message with contact information. At the bottom right, there is an 'Edit' button highlighted with a red box and a red arrow pointing to it.

Preferred Sending Method

1. Choose a preferred sending method. Then click **Next**.

Note: If patient does not have a valid text number, Ascend will attempt to send via email message.

The screenshot shows the 'Edit eStatement Message' interface. At the top, there are navigation steps: 'Setup steps: Preferred Sending Method > Email Message > Text Message > Practice Info'. Below this, there's an information message: 'Information. This message will be sent soon after eStatements have been generated. Email is the preferred sending method for this reminder.' The 'Preferred sending method' section has two radio buttons: 'Email' (selected) and 'Text'. A red box highlights the 'Next' button at the bottom, with a red circle containing the number '1' next to it.

Email Message

2. Customize the subject line for email communications.
3. Type any custom text that you want to add to the automated message.

Edit eStatement Message

Setup steps: Preferred Sending Method **Email Message** Text Message Practice Info

Information. This message will be sent soon after eStatements have been generated. Email is the preferred sending method for this reminder.

Email message

Subject *

Jen Dental Your Electronic Statement

Automated message ⓘ

Hi Steph,
Thank you for your recent visit to our office.
An electronic statement has been generated for you that shows the work performed including your balance.

Automated Message

Custom message ⓘ

Please call our office to make a payment. Have a fantastic day!

Custom Message

← Back **Next →** Cancel

Text Message

4. Type any custom text that you want to add to the automated message.

Edit eStatement Message

Setup steps: Preferred Sending Method Email Message **Text Message** Practice Info

Information. This message will be sent soon after eStatements have been generated. Email is the preferred sending method for this reminder.

Text message

Automated message ⓘ

From Jen Dental:
Steph -
Thank you for your recent visit to our office.
An electronic statement is available here:
<https://example.com/estatement-url>

Automated Message

Custom message ⓘ

Please call our office to make a payment. Have a fantastic day!

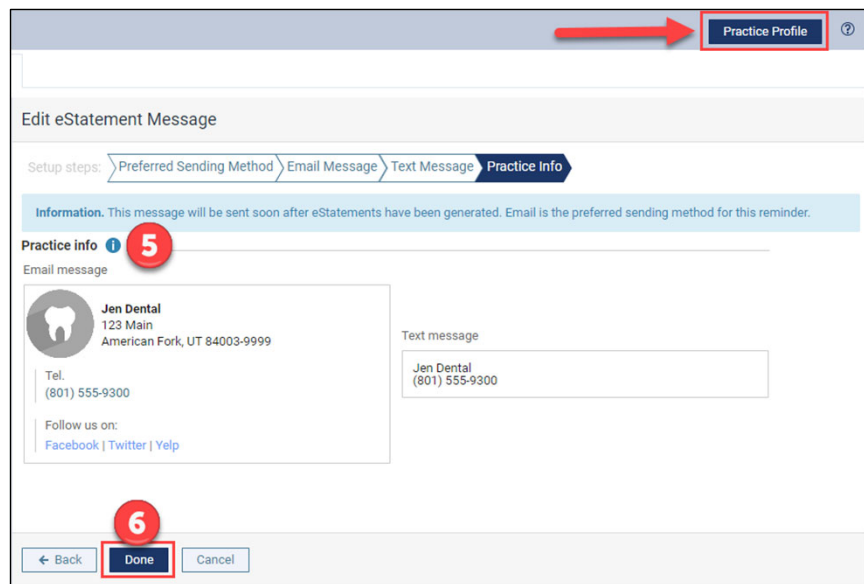
Custom Message

Adding additional content may result in multiple individual text messages being sent to the patient.

← Back **Next →** Cancel

5. Preview Practice Information as it will appear in your eStatement message.
6. Click **Done** to save your changes.

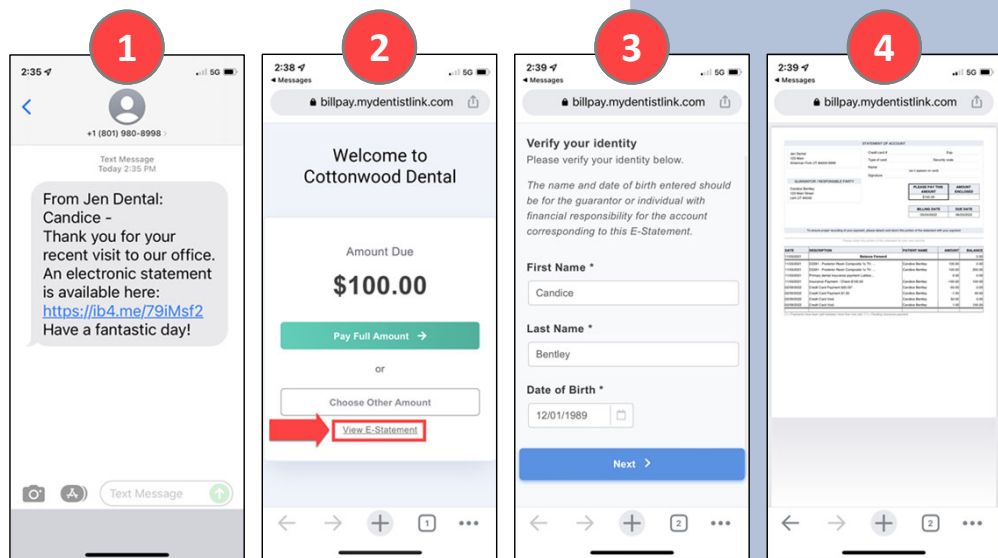
Note: You can click **Practice Profile** to edit the logo and social media links if you have the **Manage Web Profile** right.



Common Question

What does the patient see when they get the eStatement message?

The guarantor gets a text message or an email containing a link to view their statement.



eStatements: Security Rights

To perform tasks related to eStatements, you must have the following rights:



Review Communications setup	User can view the Statement message
Manage Communications setup	User can edit the eStatement message



RECAP

Key #2: Custom eStatements

Sending eStatements	<ul style="list-style-type: none"> You can send as many eStatements as you want. This is included in your Ascend subscription.
Customizing eStatements	<ul style="list-style-type: none"> Customize the email or text message which contains a link to the eStatement. Add a custom message that will appear on the statement itself.



If you have questions, submit them in the question box.

Where to Get Help

Articles

- [Viewing electronic statements and making payments online](#)
- [Customizing the Message on Your eStatement](#)

Videos

- [Sending Electronic Statements](#)
- [Dentrix Ascend Online Payments](#)

Webinar

- [Improve Cash Flow with Dentrix Ascend Revenue Cycle Management Solutions](#)



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Key 3: Two-Way Text Messaging

Send and reply to text messages from primary contacts.

Benefits of Two-Way Text Messaging



Quickly communicate with patients in the way they want to communicate



Respond to questions before or after an appointment



Save time by sending forms before the appointment



Reduce missed appointments by sending text reminders

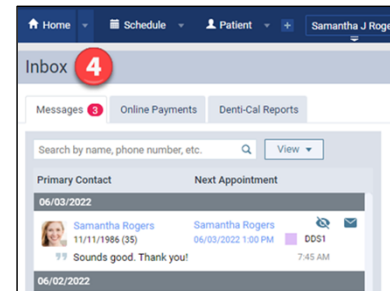
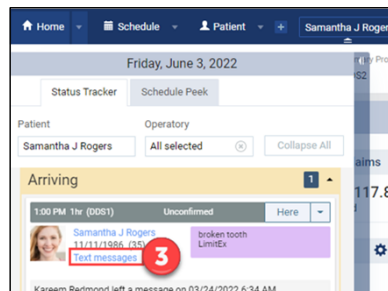
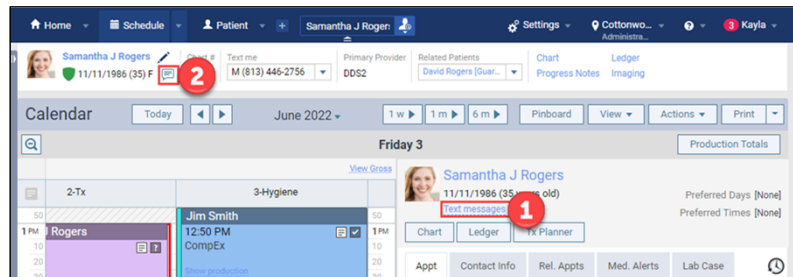
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Two-Way Text Messaging: Where to Find It

Text a patient or access the patient's messaging history from 4 places:

1. Calendar appointment
2. Patient Information bar
3. Routing panel
4. Inbox



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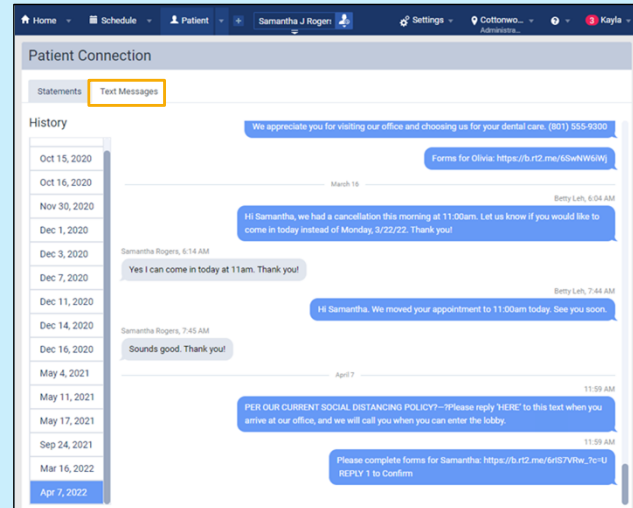
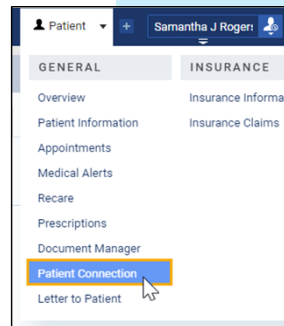
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Tip

Text Messages History

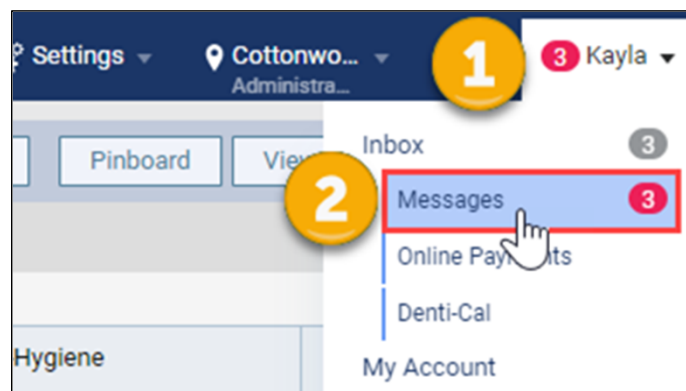
- From the **Patient** menu, select **Patient Connection**.
- You can see a history of the text messages for a patient broken out by day and time.



Two-Way Text Messaging: Managing Messages

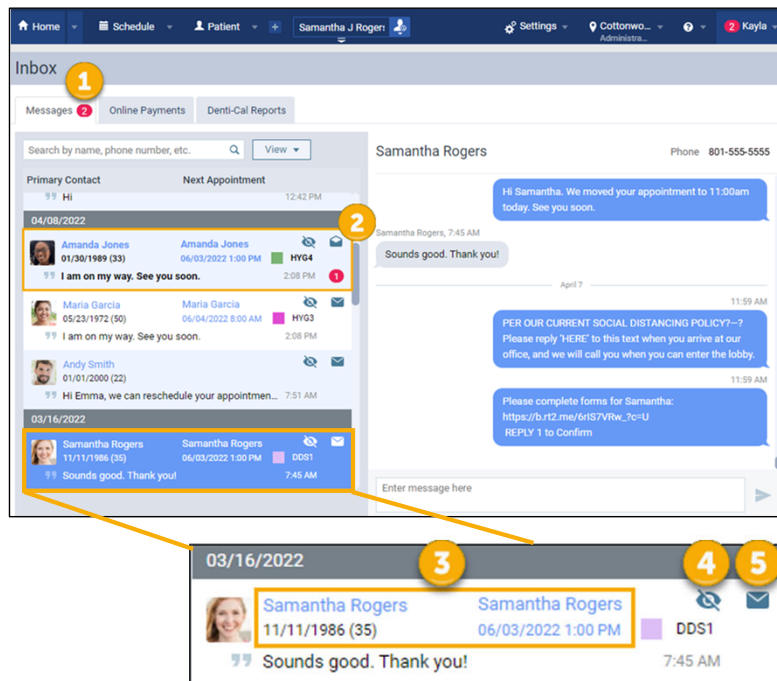
The Inbox is the **best** place to manage text messages.

1. Click your username to access the Inbox.
2. Click Messages.



Tip: A red dot by your username means that the office has a new message.

1. See the total # of unread messages
2. Unread messages are bolded
3. Each message shows:
 - link to patient record
 - date of birth
 - link to next appt. for them or any household member
4. Hide message
5. Mark as unread



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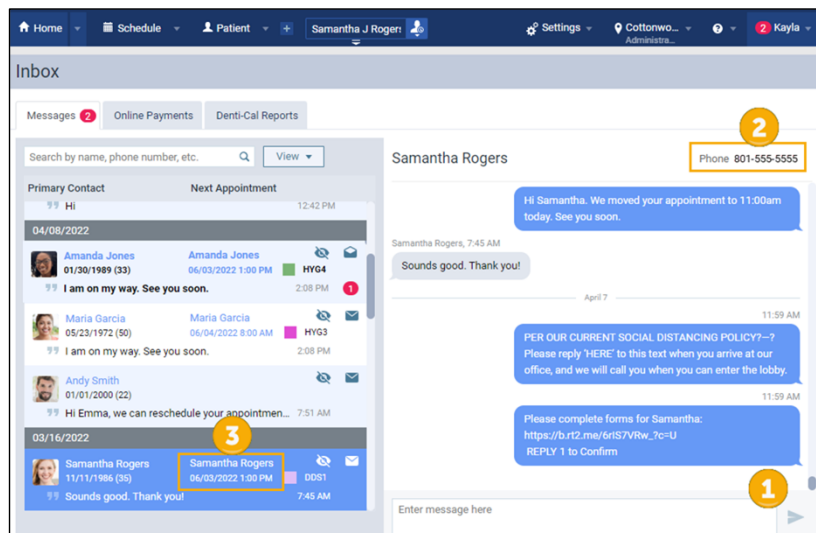
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Two-Way Text Messaging: Workflow Scenarios

At the start of the day, open the Inbox to check your messages.

From this page, you can:

1. Reply to a text message.
2. Call a patient using the contact information.
3. Click the appointment link to view the patient's appointment.

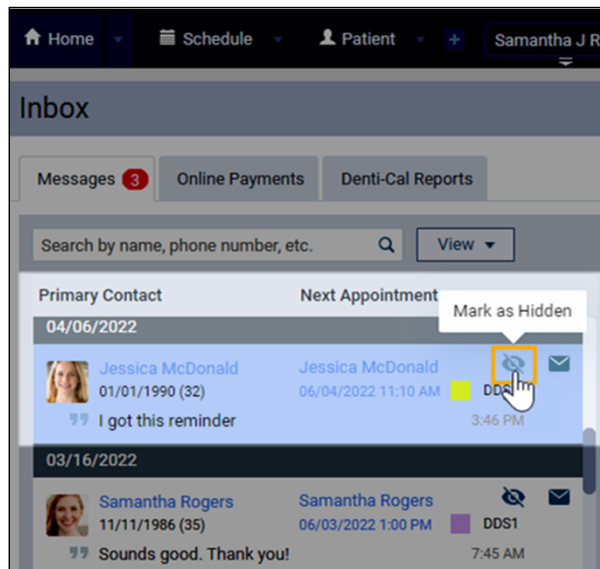


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Scenario 1: No Action Needed, Hide the Message

- The patient replied to an appointment reminder.
- Since no action is needed, click the **Hide icon** to hide the message.
- This prevents messages from stacking up in your Inbox.



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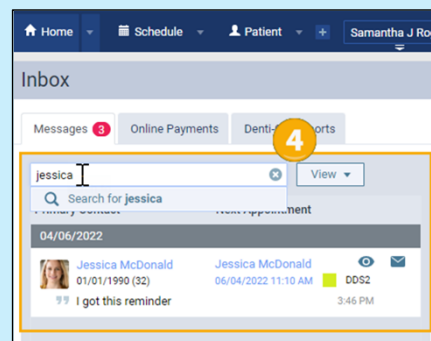
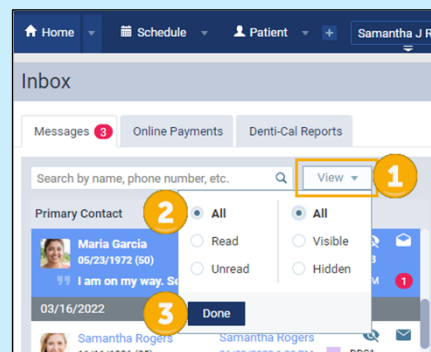
Tip

Find a Hidden Message

1. Click the **View** filter.
2. Select **All** for both filters.
3. Click **Done**.

Now you can see all the messages in your inbox.

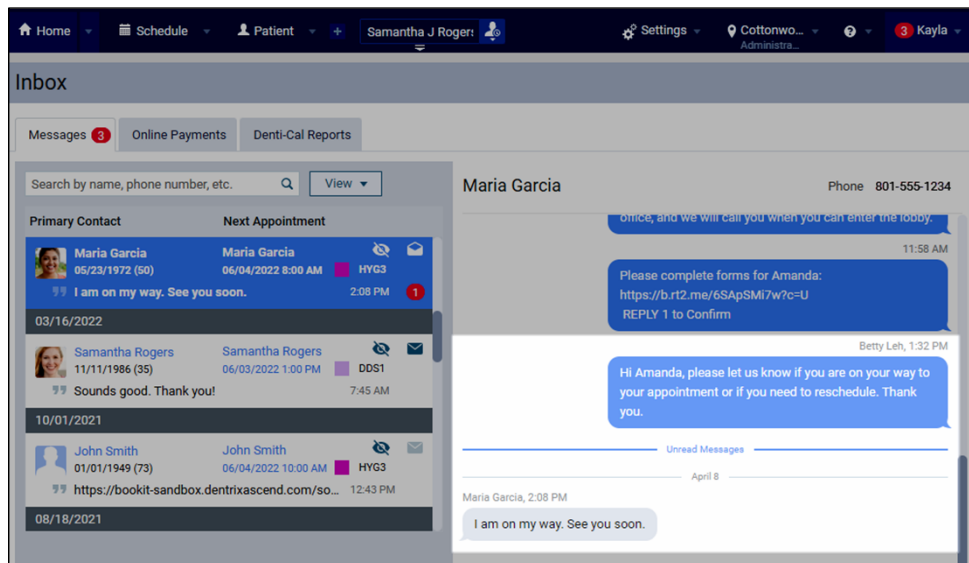
4. Type the patient's name or phone number in the search bar to locate a message.



Scenario 2: Patient Running Late; "I'm on my way"

Patient Running Late

- You notice that a patient has not arrived yet.
- Send them a message to check whether they are still coming.



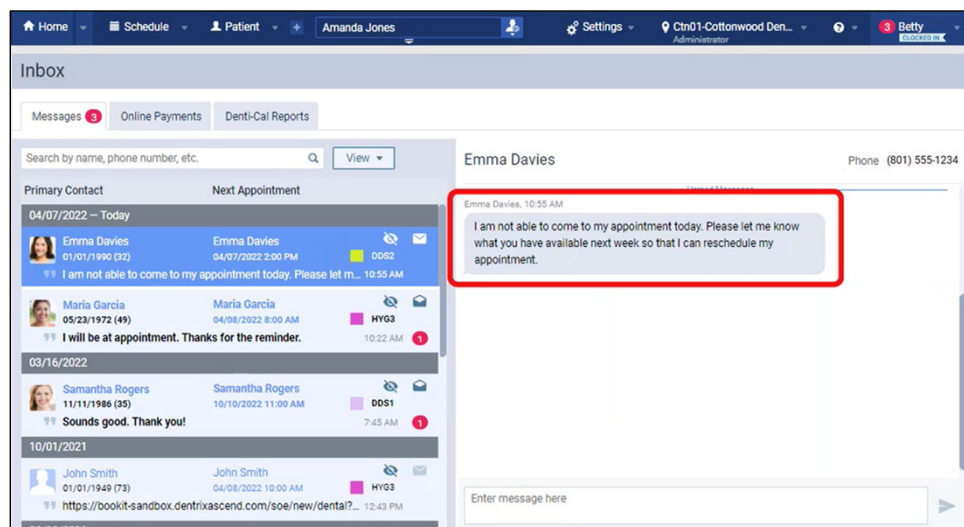
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Scenario 3: Patient Needs to Reschedule

Patient Needs to Reschedule

- You could call the patient using the contact information.
- OR
- You could mark their appt as broken and send them a text message.

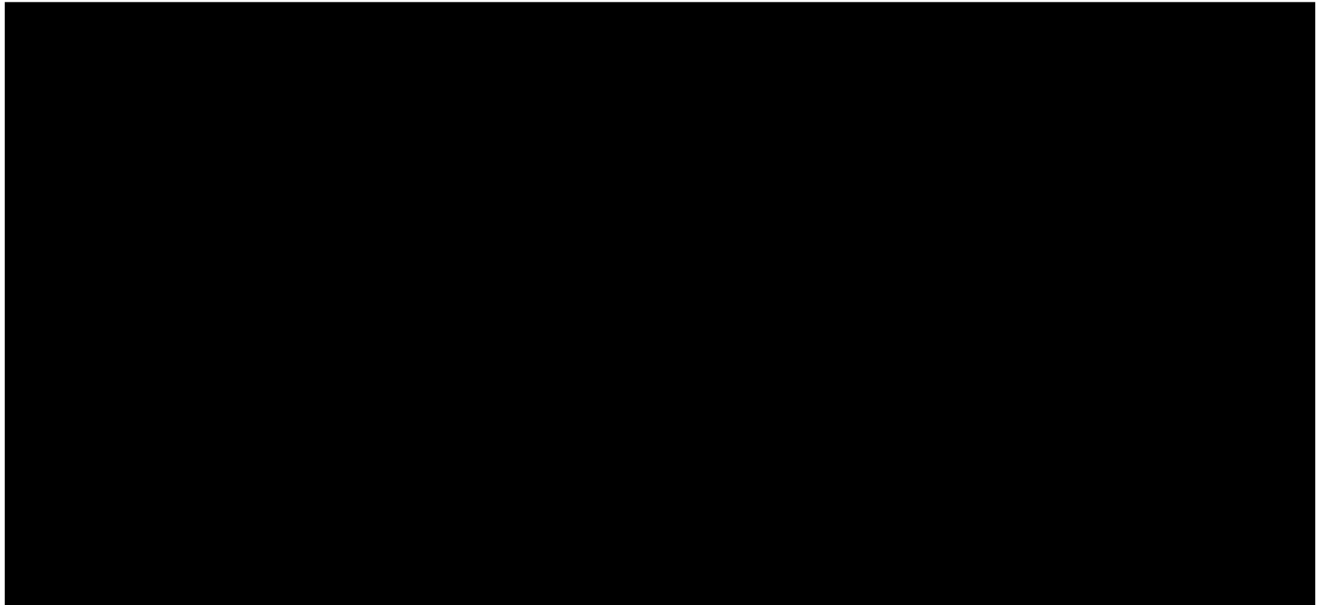


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Two-Way Text Messaging: Scenario 3

[Click here to watch](#)



Common Question

How do we find the phone number that our patients will receive texts from?

1. Enter a patient's name in the Search box.
2. From the Patient menu, select **Patient information**.
3. Select the **Preferences** tab.
4. Click the information icon by **Text Messages**.
5. The **Notes** section shows the messaging number for your location.

Patient Information

Basic Info
 Related Patients
 Medical Alerts
 Patient Forms
 Preferences
 Referrals
 Notes

Preferred Contact Method
 Call me M (801) 610-6
 Text me
 Email me

Text Messages ⓘ
 Mobile number for text messages
 Yes No

Preferred Language
 English

Preferred Location
 Grace Family Dental

Information
 Select **Yes** or **No** to indicate that the patient (and any other patients who have this patient as their primary contact) will or will not receive text messages (including automated reminders for appointments and recare).

Notes:

- Text messages will be sent to the mobile phone number displayed.
- If someone in your office opted the patient out of receiving text messages, or the patient texted STOP to +14352967789, the opt out date appears next to the **No** option.

When a patient opts out, an explanatory text message will be sent to the patient's mobile phone. The patient can resume receiving text messages **only** by texting START to +14352967789. If the patient opted out of receiving messages, then changing this setting in Ascend will have no effect.

opt back in

Two-Way Text Messaging: Security Rights

To perform tasks related to two-way text messaging, you must have the following rights:



Review inbox messages	<ul style="list-style-type: none"> Access the Inbox for your location. View the number of unread messages on the User menu. Mark messages in the Inbox as read or unread. View message history.
Manage inbox messages	<ul style="list-style-type: none"> Hide and unhide messages in your location's Inbox. Send or reply to text messages. Note: This right is available only if the Review inbox messages right is selected.



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Key #3: Two-Way Text Messaging

Sending Messages	<ul style="list-style-type: none"> You can send messages back and forth with primary contacts right from within Ascend. View and respond to messages from the Calendar appointment, routing panel, or patient information bar.
Managing Messages	<ul style="list-style-type: none"> Manage messages in the Inbox. Make patient communication via text a part of your daily workflow.



If you have questions, submit them in the question box.

Where to Get Help

Videos

- [Two-way Text Messaging in Dentrrix Ascend](#)

Articles

- [Viewing text messages](#)
- [Two-way Text Messaging](#)
- [Locating Your Text Messaging Number](#)



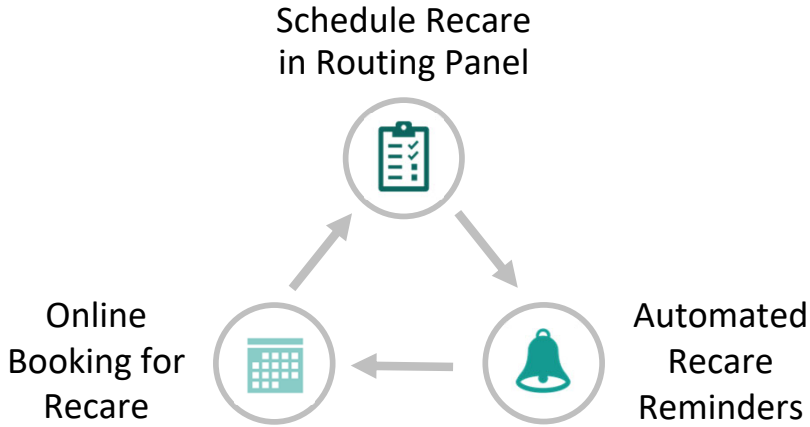
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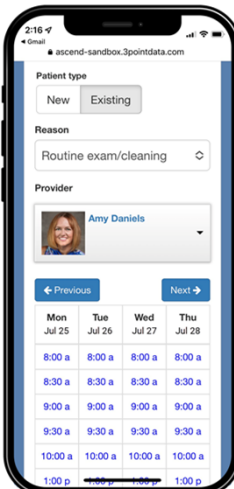
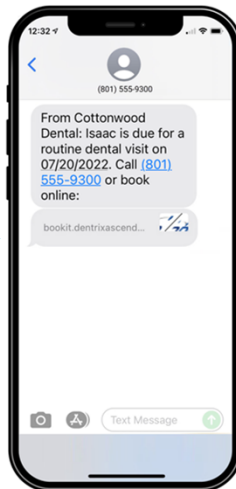
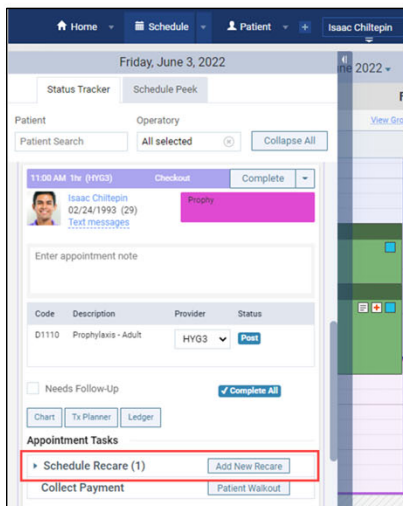
Creative Uses of Patient Communication Tools

Discover out-of-the box uses for
the built-in tools in Dentrrix
Ascend.

Example 1: Automated Recare Workflow



February 2022 Webinar: 3 Tools to Master Your Recare Workflow



Example 2: Free Google Reviews from Patient Communications

Idea from Amy Davis, McCracken Family
Dentistry, Tuscaloosa, AL

1. Settings > Patient Communications.
2. Click **Create New**.
3. On the first tab, select **Appointment Completed Date** from the dropdown.
4. Set the sending time. (Amy suggests 1 hour after the appointment.)

New Appointment Reminder

Setup steps: Notification Schedule Preferred Sending Method Email Message

This reminder is set to send 1 hour after the appointment is completed. Email is the preferred method.

When would you like to send the notification?

Appointment reminder is based on *

1 + - hours After Appointment Completed Date

Exclude automated message

Off

← Back Next → Cancel

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5. On the Email Message and Text Message tabs, add a **custom message** with your Google review link.
6. Click **Done** when you have completed the patient communication setup.

Final Message

Hi Steph,
We appreciate you and Addy for visiting our office and choosing us for dental care. We look forward to seeing you next time. Let us know how we did. Review us here: <https://g.page/r/CXjgA2P8-FEAg/review>

Setup steps: Notification Schedule Preferred Sending Method Email Message Text Message Practice Info

Subject *

Cottonwood Dental Sales Appointment Completed

Automated message ⓘ

Hi Steph,
We appreciate you and Addy for visiting our office and choosing us for dental care.
We look forward to seeing you next time.

Automated Message

Custom message ⓘ

Paragraph Verdana Font Sizes

Let us know how we did. Review us here: <https://g.page/r/CXjgA2P8-FEAg/review>

Custom Message

See [Amy's Facebook post](#) to learn how to find your Google Review link

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Example 3: Inform Your Customers about Ascend Pay

If you offer Ascend Pay (the ability to pay online from an eStatement), let customers know about this option in the eStatement message.

“You can now make secure payments online when you access your eStatement. You can still always contact our office to make payments.”

04/12/2022	D2740 - Full Porcelain/Ceramic Crown Th: 18	Candice Bentley	1,683.00	
	D4276 - Connective/Double Pedicle Graft	Candice Bentley	0.00	1,963.00

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

BALANCE 0-30 DAYS	BALANCE 31-60 DAYS	BALANCE 61-90 DAYS	BALANCE 90+ DAYS	TOTAL BALANCE	-	ESTIMATED INSURANCE	=	PATIENT PORTION
434.00	174.00	1,683.00	280.00	1,786.00		434.00		1,352.00

TOTAL BALANCE takes into account a remaining payment/credit of \$785.00 that has not yet been applied to charges.

Statement Message

You can now make secure payments online when you access your eStatement. You can still always contact our office to make payments

Reminder: We bill your insurance as a courtesy to you. It is YOUR responsibility to be familiar with your plan coverage, limitations and copays, etc. We advise that you follow-up with your insurance carrier on any claims unpaid after 60 days from date of service. CLAIMS THAT ARE NOT PAID FOLLOWING 90 DAYS FROM DATE OF SERVICE will become patient responsibility for payment AT TIME OF VISIT.



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Example 4: Creative Uses for Text Messaging



Let patients know when their lab case arrives



Inform patients about unexpected office closures



Send a birthday message



Tell patients about appointment openings



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Creative Uses of Patient Communication Tools

Example 1	Automated Recare Workflow
Example 2	Free Google Reviews from Patient Communications
Example 3	Inform Your Customers about Ascend Pay
Example 4	Creative Uses for Text Messaging



If you have questions, submit them in the question box.

RECAP: 3 Keys to Effectively Communicate with Your Patients Using Dentrix Ascend



Key 1: Appointment and Recare Notifications



Key 2: Custom eStatements



Key 3: Two-Way Text Messaging



Creative Uses of Patient Communication Tools

Practice Success



Q&A

Contact Support at 855.232.9493, Option 2
or email support@DentrixAscend.com

Find valuable information in the
[Dentrix Ascend Resource Center](#)