Practice Success

3 Keys to Effectively Communicate with Your Patients Using Dentrix Ascend

HENRY SCHEIN ONE | 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!

HENRY SCHEIN ONE DENTRIX ASCEND

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

HENRY SCHEIN ONE   DENTRIXASCEND

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

HENRY SCHEIN ONE   *DENTRIX ASCEND*

Appt & Recare Reminders: Where to Find It

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

⚙ Settings ▾	📍 Cttn1-Cottonwood Dent... ▾ Administrator	❓ ▾	👤 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	

HENRY SCHEIN ONE   *DENTRIX ASCEND*

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.

Dentrix Ascend comes with some reminders; you can customize which ones to turn on.
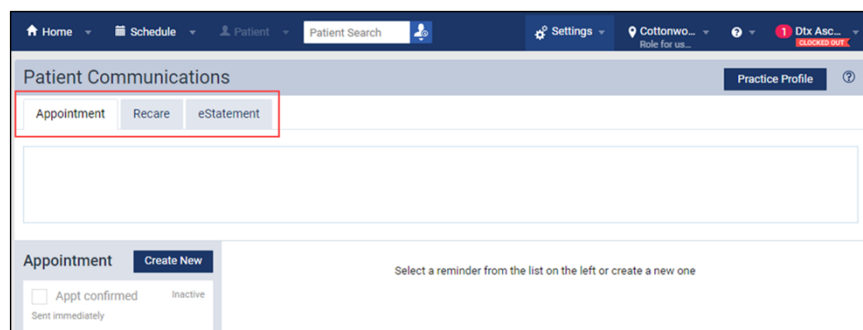- 9 default appointment communications

- 4 default recare communications
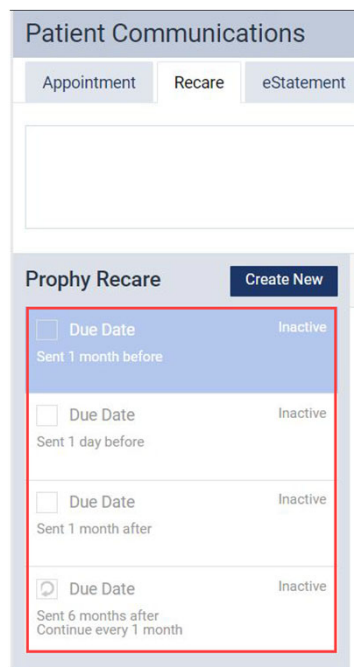
Appt & Recare Reminders: 3 Tabs

- 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.

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.

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.

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

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.

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.

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.

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.

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.

Appt & Recare Reminders: Activating Reminders

A. Make the communication active by turning on the Active switcher.

B. 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.

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 Sent 1 hour after Continue every 1 month	💬, ✉

✉, 💬	Email is preferred. Text is the alternative.
💬, ✉	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 **On**

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

? 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.

? 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.

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.

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.

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

HENRY SCHEIN ONE   DENTRIX ASCEND

Key 2: Custom eStatements

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

---

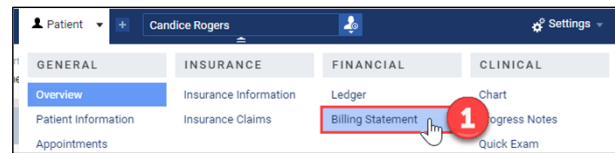# Benefits of Customizing eStatements

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

HENRY SCHEIN ONE   DENTRIX ASCEND

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**.

---

4. Click the **Actions** menu.

5. Select **Send eStatement only**.

6. Click **Send**.

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.

Customizing the eStatement: Where to Find It

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

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.

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.

Email Message

2. Customize the subject line for email communications.

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

Text Message

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

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.
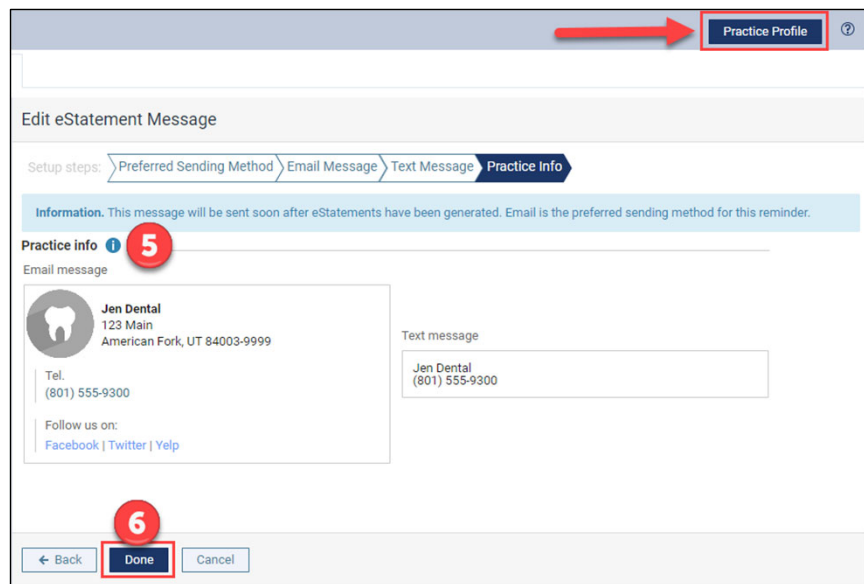
? Common Question

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.
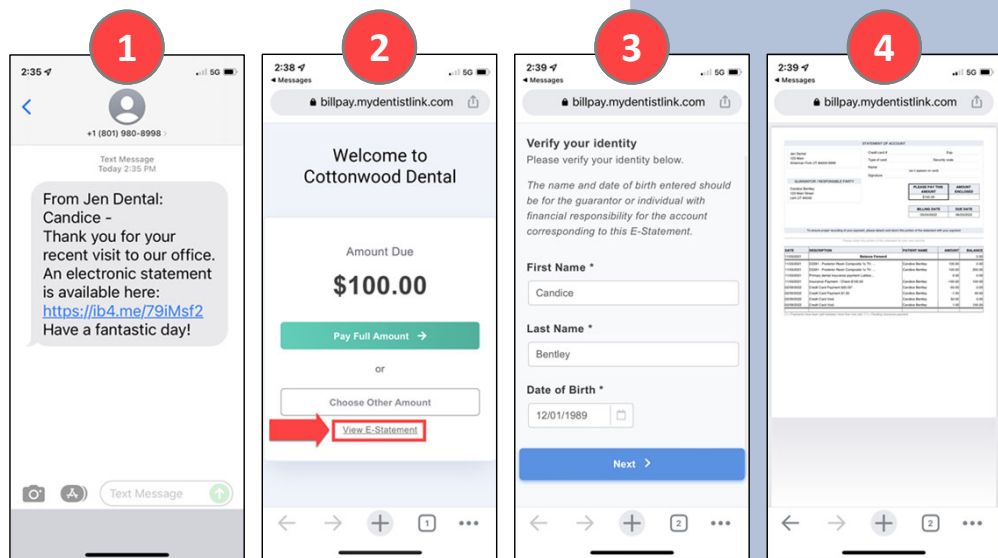
eStatements: Security Rights

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

HENRY SCHEIN **ONE**   **DENTRIXASCEND**

RECAP
Key #2: Custom eStatements

Sending eStatements	• You can send as many eStatements as you want. This is included in your Ascend subscription.
Customizing eStatements	• 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](#)

HENRY SCHEIN ONE   DENTRIX ASCEND

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

HENRY SCHEIN ONE — DENTRIX ASCEND

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
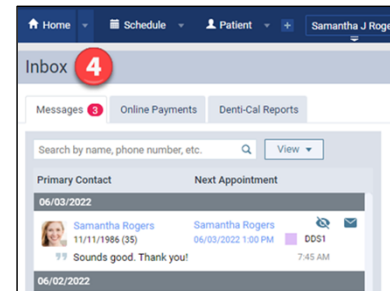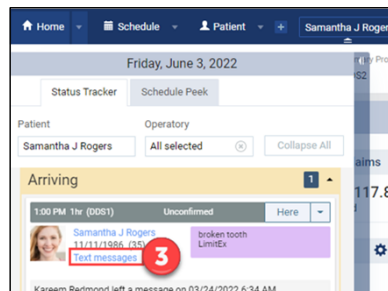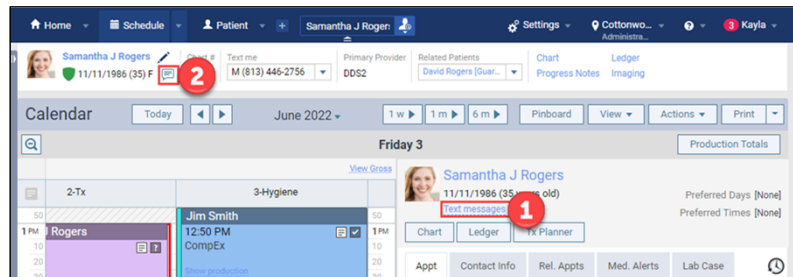
HENRY SCHEIN ONE — DENTRIX ASCEND

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.
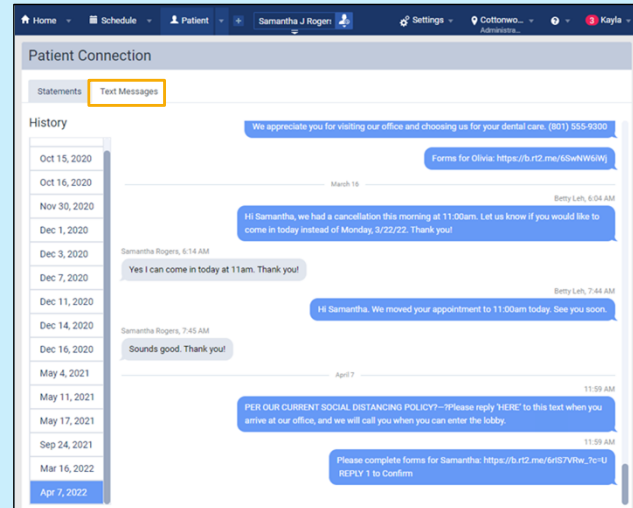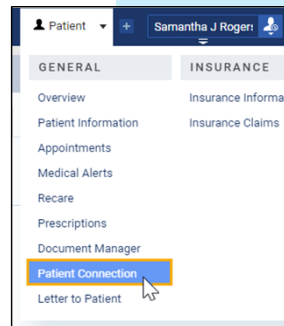
Two-Way Text Messaging: Managing Messages

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

1. Click your username to access the Inbox.

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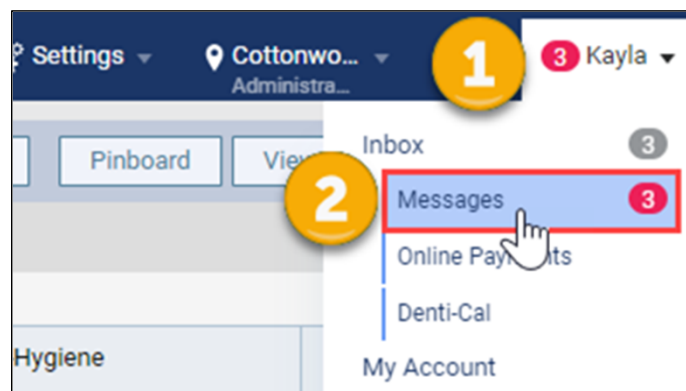
Tip: A red dot by your username means that the office has a new message.

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

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.
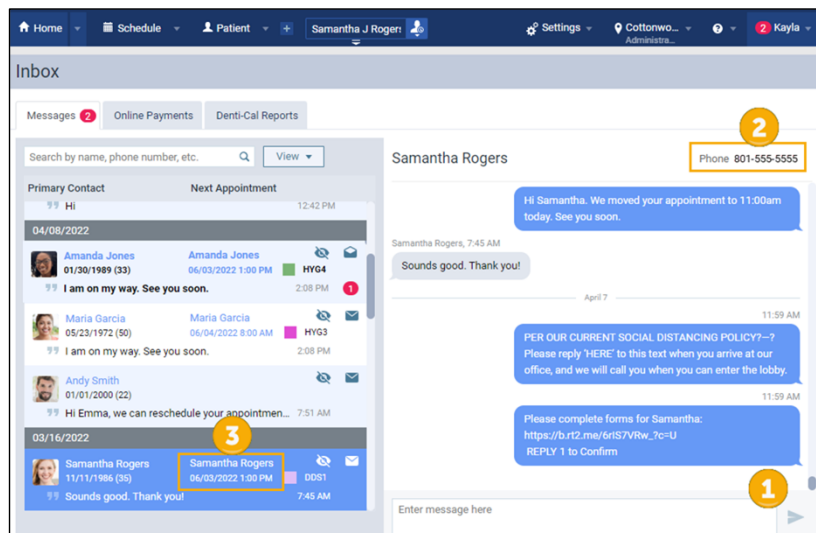
Scenario 1: No Action Needed, Hide the Message

- 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.
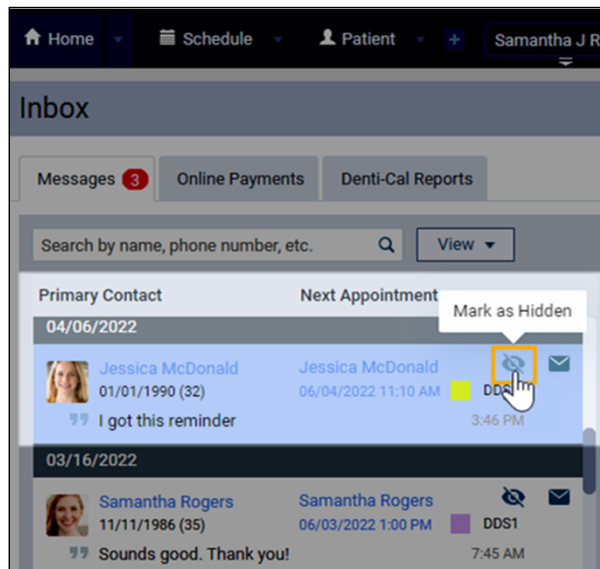
Tip

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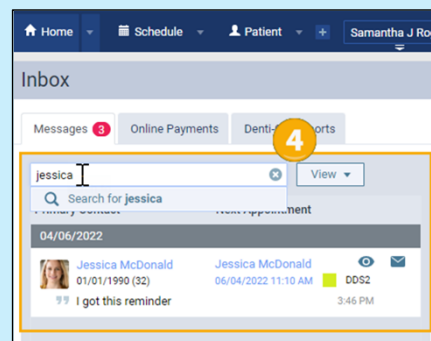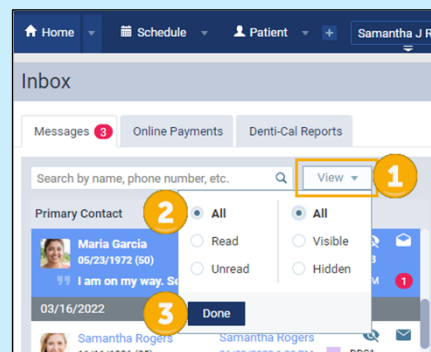
Scenario 2: Patient Running Late; "I'm on my way"

Patient Running Late

- You notice that a patient has not arrived yet.

- Send them a message to check whether they are still coming.
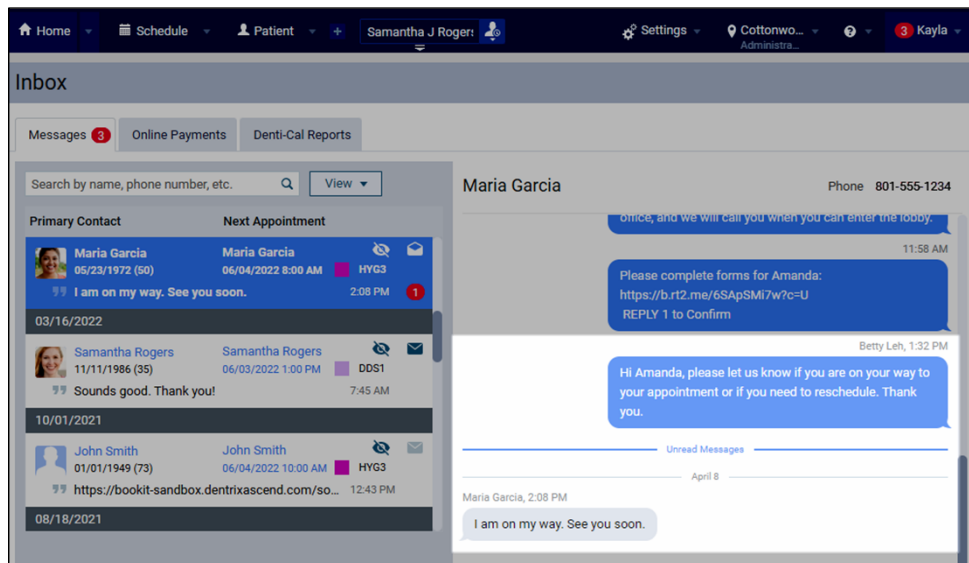
Scenario 3: Patient Needs to Reschedule

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.
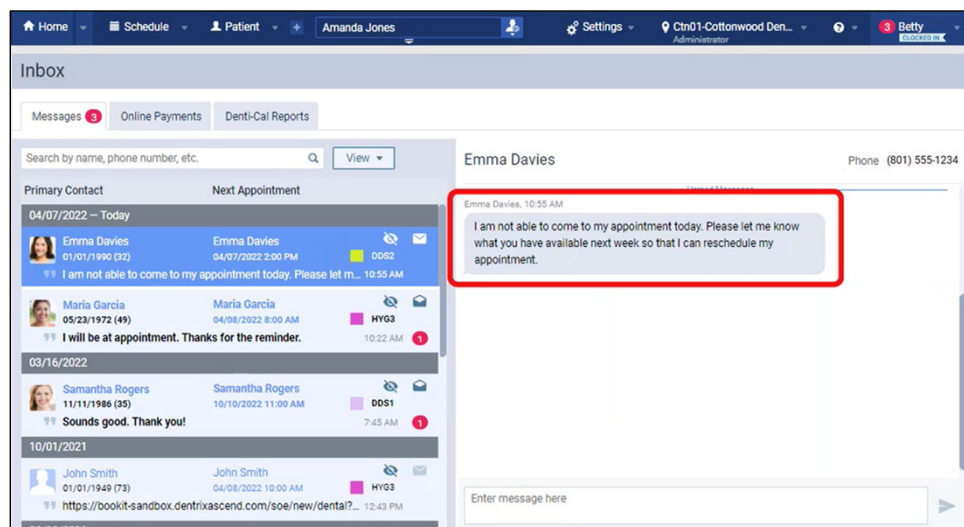
Two-Way Text Messaging: Scenario 3
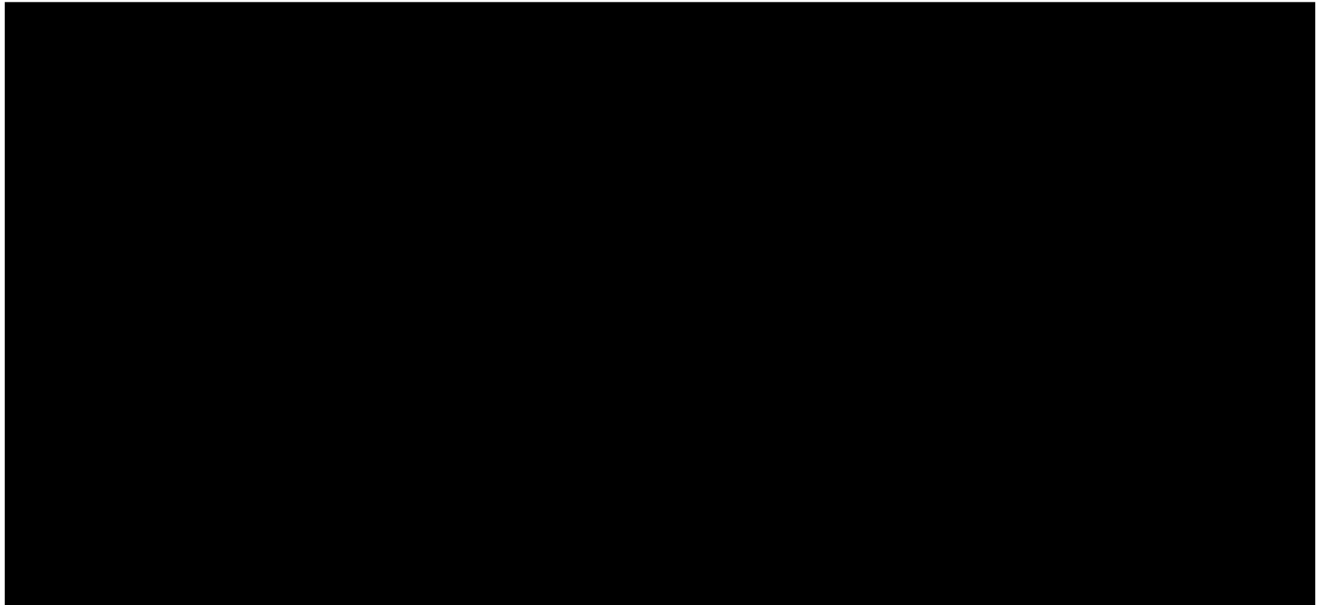
Common Question

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.

Two-Way Text Messaging: Security Rights

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

Review inbox messages	• 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	• 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.

HENRY SCHEIN ONE   **DENTRIX ASCEND**

RECAP
Key #3: Two-Way Text Messaging

Sending Messages	• 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	• 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 Dentrix Ascend

Articles

- Viewing text messages
- Two-way Text Messaging
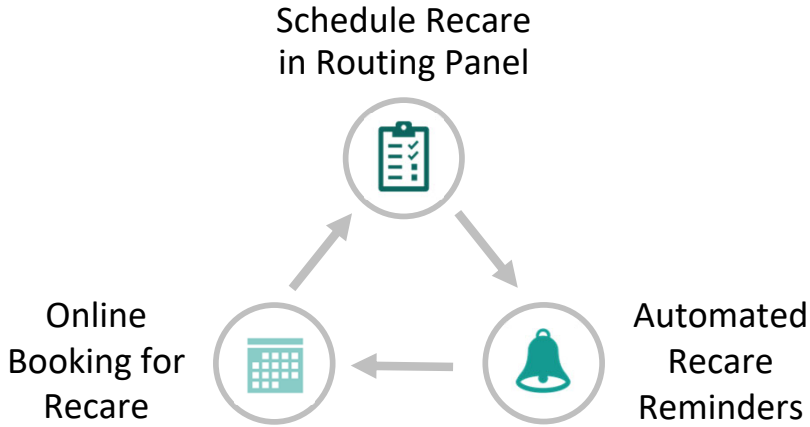- Locating Your Text Messaging Number

HENRY SCHEIN ONE   *DENTRIX ASCEND*

Creative Uses of Patient Communication Tools

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

Example 1: Automated Recare Workflow

Schedule Recare
in Routing Panel

February 2022 Webinar:
3 Tools to Master Your
Recare Workflow

Online
Booking for
Recare

Automated
Recare
Reminders
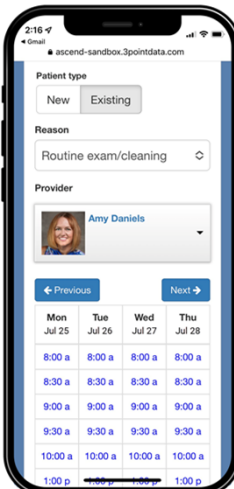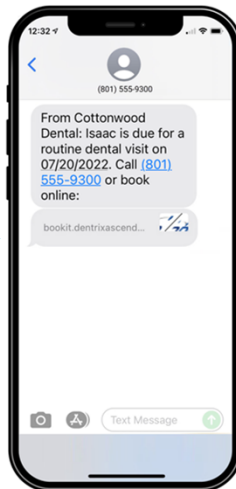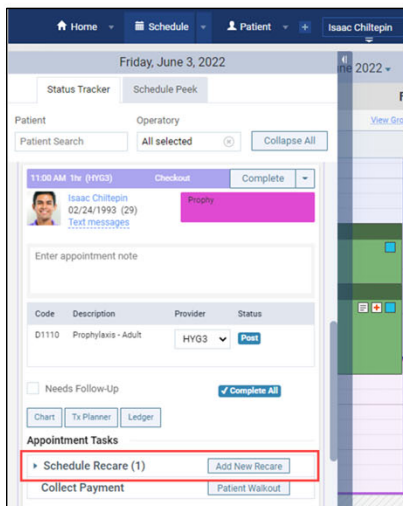
Example 2: Free Google Reviews from Patient Communications

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.)

---

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

See Amy's Facebook post to learn how to find your Google Review link

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.

HENRY SCHEIN ONE — DENTRIX ASCEND

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

HENRY SCHEIN ONE — DENTRIX ASCEND

RECAP
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