

**DENTRIXASCEND**

Practice Success



# 3 Tools to Master Your Recare Workflow



## Presenter Introduction

### Jo Lowery

- Over 32 years of experience in the dental field.
- Certified trainer for Henry Schein since 2011.
- Awarded Dentrrix Ascend Trainer of the Year in 2017.
- Loves the living breathing nature of Dentrrix Ascend and is always excited to see what efficiencies Ascend brings to dentistry next!



**DENTRIXASCEND**

## In this webinar:



Tool #1: Recare Assignments



Tool #2: Automated Reminders



Tool #3: Online Booking for Recare



Using Recare Reports



## Tool #1: Recare Assignments

Customize your recare set up for  
your practice and for individual  
patients

## Benefits of Assigning Recare



Help patients maintain their oral health



Maintain a full and productive schedule



Track recare due dates automatically with Ascend



Schedule the next recare appointment with Ascend's automatic reminders



**DENTRIXASCEND**

## How to Set Up Recare

Setting up Recare for your practice has two steps.

1. Set Up Recare Types
2. Assign Recare for Individual Patients

**1**

Type	Description	Interval
BITEWINGS	annual bitewings	1 Yr
FMX	full mouth x-rays	3 Yrs
ORTHO	ortho post-treatment stabi...	1 Mo
PANOREX	panoramic film	3 Yrs
PERIO	periodontal maintenance	3 Mos
PROPHY	periodic cleaning and exam	6 Mos
SCREENING	oral cancer screening	6 Mos

**2**

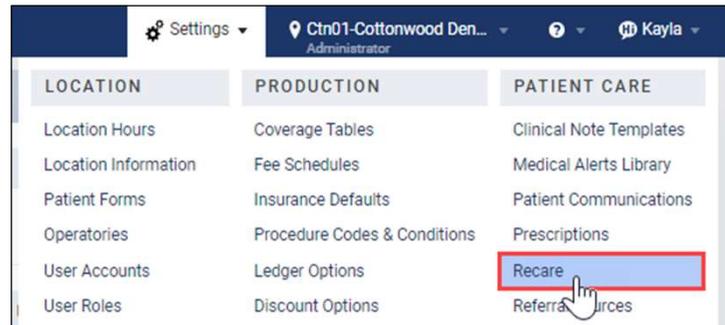
Type	Due Date	Appointment	Interval
BITEWINGS	01/21/2023	Unscheduled	1 Yr
PROPHY	07/21/2022	Unscheduled	6 Mos



**DENTRIXASCEND**

# 1 Step One: Set Up Recare Types

- From the Settings menu, select **Recare**.



**Note:** Accessing this page requires the **Review Recare Set Up** and **Manage Recare Set Up** rights.

Dentrix Ascend has the most common recare types already set up.

- Primary recare types (shown in bold) are procedures for which Ascend will send reminders.
- Secondary recare types are additional procedures that will NOT trigger a reminder.

Recare Setup		
Type	Description	Interval
BITEWINGS	annual bitewings	1 Yr
FMX	full mouth x-rays	3 Yrs
<b>ORTHO</b>	<b>ortho post-treatment stabi...</b>	<b>1 Mo</b>
PANOREX	panoramic film	3 Yrs
<b>PERIO</b>	<b>periodontal maintenance</b>	<b>3 Mos</b>
<b>PROPHY</b>	<b>periodic cleaning and exam</b>	<b>6 Mos</b>
SCREENING	oral cancer screening	6 Mos

Select a recare type to see the description, default interval, and procedures.

To edit a recare type:

1. Select the recare type.
2. Make the change.
3. Click **Save**.

**Note:** You will not be able to edit a recare type that is assigned to patients.

The screenshot shows the 'Recare Setup' window. On the left is a table of recare types. The 'PERIO' row is selected and highlighted in blue. On the right is the 'Edit Recare Information' panel. The '\*Type' dropdown is set to 'PERIO'. The 'Description' field contains 'periodontal maintenance'. The 'Interval' is set to '3 Months'. There is a checkbox for 'Primary Recare Type' which is unchecked. The 'Procedures' section has a text input 'Add Procedures' and a dropdown menu showing 'D4910 Periodontal Maintenance'. At the bottom right, the 'Save' button is highlighted with a red box, and the 'Cancel' button is next to it.

Type	Description	Interval
BITEWINGS	annual bitewings	1 Yr
FMX	full mouth x-rays	3 Yrs
ORTHO	ortho post-treat...	1 Mo
PANOREX	panoramic film	3 Yrs
PERIO	periodontal mai...	3 Mos
PROPHY	periodic cleanin...	6 Mos
SCREENING	oral cancer scre...	6 Mos

To add a new recare procedure:

1. Click **Create New**.
2. Fill out the required information
3. Click **Save**.

The screenshot shows the 'Recare Setup' window. On the left is the same table of recare types as in the previous screenshot. On the right is the 'Create New Recare' panel. A red circle with the number '1' is next to the 'Create New' button at the top right. A red box with a red circle containing the number '2' surrounds the form fields: '\*Type' (set to 'Type'), 'Description' (empty), 'Interval' (set to '1 Months'), 'Primary Recare Type' (unchecked), and 'Procedures' (set to 'Add Procedures'). At the bottom right, a red circle with the number '3' is next to the 'Save' button, which is highlighted with a blue box. The 'Cancel' button is next to it.



## Tip

Check **Primary Recare Type** to automatically set up reminders for yourself and patients.

- The Routing Panel will only prompt you to schedule Primary Recare Types.
- Patient Communications are only sent for Primary Recare Types.

Recare Setup			Edit Recare Information	
Type	Description	Interval	*Type	
BITEWINGS	annual bitewings	1 Yr	PROPHY	
FMX	full mouth x-rays	3 Yrs	Description	periodic cleaning and exam
ORTHO	ortho post-treat...	1 Mo	Interval	6 + - Months
PANOREX	panoramic film	3 Yrs	<input checked="" type="checkbox"/> Primary Recare Type	
PERIO	periodontal mai...	3 Mos	Procedures	Add Procedures
PROPHY	periodic cleanin...	6 Mos		D1110 Prophylaxis - Adult x
SCREENING	oral cancer scre...	6 Mos		D1120 Prophylaxis - Child x

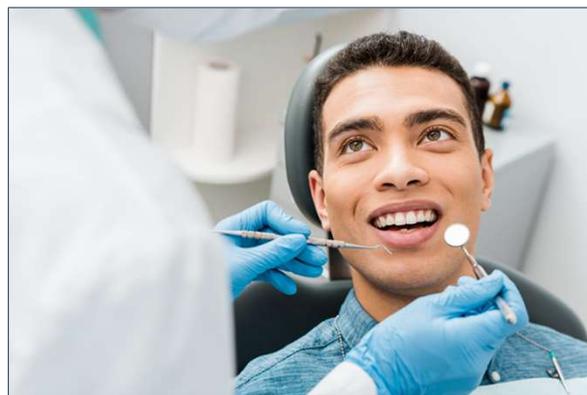
## 2 Step Two: Assign Recare to Patients

Now that you have recare types set up for your practice, you can assign recare to patients.

You can do this in two places:

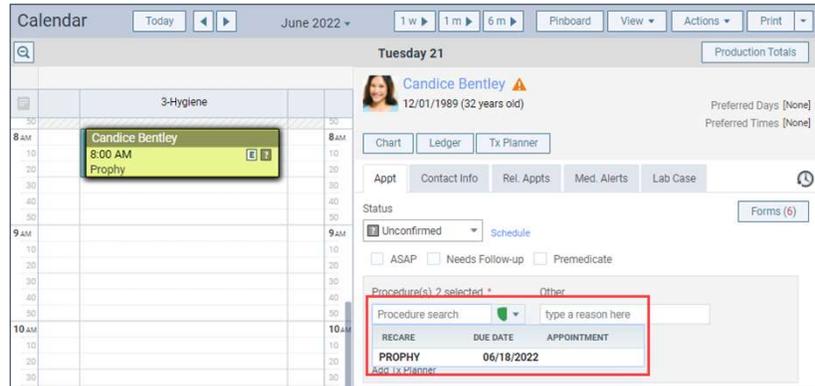
1. From the Calendar appointment
2. From the patient's Recare Page

**Note:** This action requires the **Review and Manage Patient Recare** right.



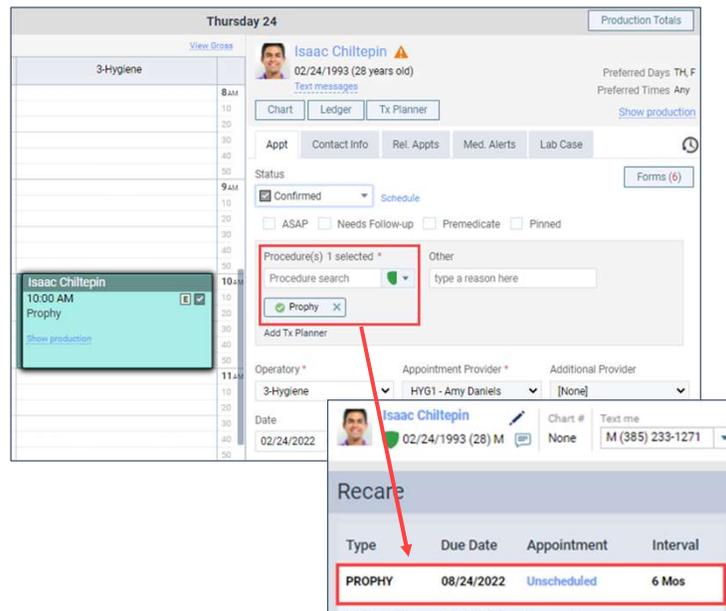
Assigning Recare from the Calendar Appointment:

Click the Procedure search box to see a patient's assigned recare along with the due date(s).



When you select a recare procedure for a patient, Ascend automatically makes the recare assignment.

**Example:** When you add a Prophy to this appointment, this patient is automatically set up with the Prophy recare type.

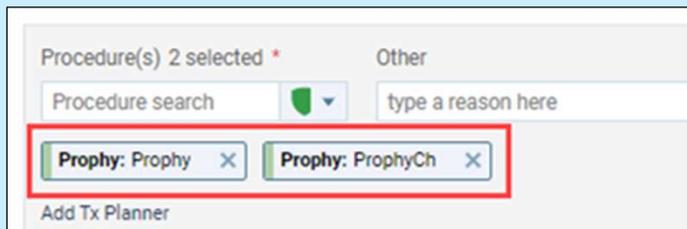




## Tip

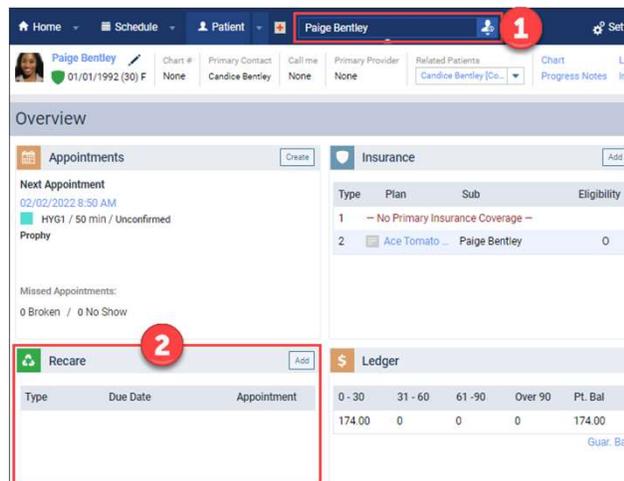
### Prophy Recare Type

- The Prophy recare type includes procedures for a child and an adult.
- Simply remove one of the procedures before saving the appointment.



### Assigning Recare from the Patient's Recare page

1. Use the Search bar to locate a patient.
2. Click the patient's **Recare** widget.



3. Select **Add New Recare**.
4. From the **Type** drop down, select a recare type.
5. Edit the details if needed.
6. Click **Save**.

Recare

Add New Recare 3 Add New Recare

4 Type: [dropdown]

RE CARE	DESCRIPTION	INTERVAL
BITEWINGS	annual bitewings	1 Year
FMX	full mouth x-rays	3 Years
ORTHO	ortho post-treatment stabil...	1 Month
PANOREX	panoramic film	3 Years
PERIO	periodontal maintenance	3 Months
PROPHY	periodic cleaning and exam	6 Months

Add New Recare

5 Type: PERIO

Interval: 3 + - Months

Due Date: 04/20/2022

Description: periodontal maintenance

6 Save Cancel



## Tip

### Customize Interval By Patient

- Select the recare type.
- Edit the Interval.
- Click **Save**.

This will **not** change the default interval for all patients.

No need to make multiple Recare types for the same code.

Recare

Add New Recare

Type	Due Date	Appointment	Interval
PERIO	04/20/2022	Unscheduled	3 Mos

1

PERIO

Added by Kayla Bowman on 01/19/2022

periodontal maintenance

Due Date: 05/20/2022

Appointment:

2 Interval: 4 + - Months

3 Save Cancel Delete



## Tip

### Assign Multiple Recare Types

You can assign multiple recare types to a patient.

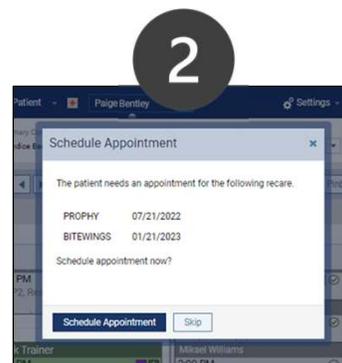
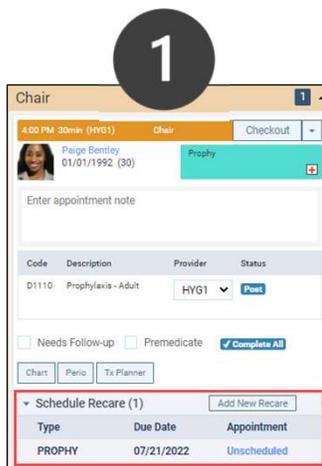
Recare			
Type	Due Date	Appointment	Interval
BITEWINGS	01/21/2023	Unscheduled	1 Yr
PROPHY	07/21/2022	Unscheduled	6 Mos

## How to Schedule the Next Recare Appt

Invite patients to schedule their next recare appointment before they leave the office.

Ascend will prompt you to schedule the next recare appointment in two places:

1. In the Routing Panel
2. In the Calendar



# 1 Scheduling Recare from the Routing Panel

The Routing Panel prompts you to schedule the patient's next recare appointment.

This reminder shows up in 2 statuses:

- The Clinical team sees the reminder in **Chair** status.
- The Admin team sees the reminder in **Checkout** status.

HENRY SCHEIN ONE

DENTRIXASCEND

For patients with recare set up but with no scheduled appointment:

1. Click **Unscheduled**.
2. Ascend opens the schedule to the due date.
3. The procedures are automatically added.

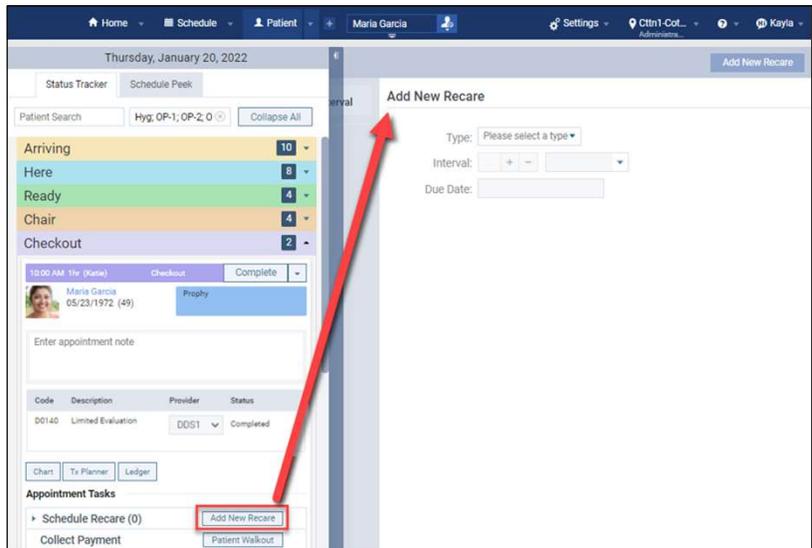
**Note:** The code for the current visit must be posted in order for Ascend to show the correct due date.

HENRY SCHEIN ONE

DENTRIXASCEND

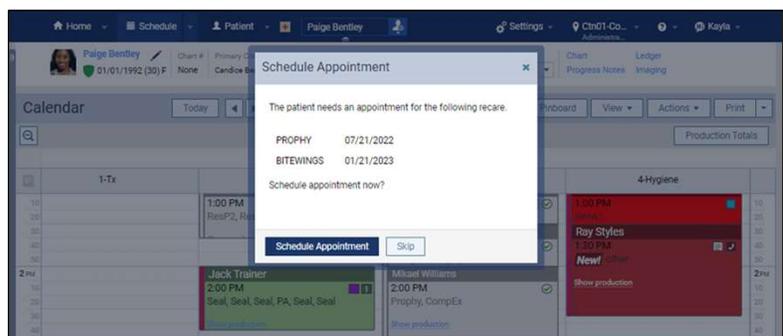
For patients with no recare set up:

1. Click **Add New Recare**.
2. Set up the recare type, interval, and due date.



## 2 Scheduling Recare from the Calendar

When you complete an appointment in the calendar, Ascend checks to see whether the patient is scheduled for their next recare appointment.



For patients with no recare set-up, you'll be prompted to set up recare.



For patients with recare set-up but with no scheduled appointment, you'll be prompted to schedule an appointment.

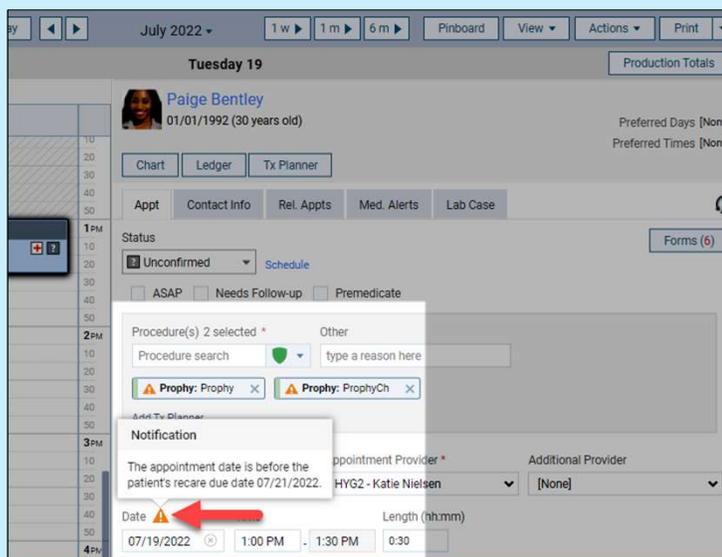


## Tip

### Recare Due Date Alerts

Ascend will alert you if you try to schedule an appointment before the patient's recare due date.

**Note:** This is to prevent scheduling sooner than allowed by the insurance.



## Where to Get Help

### Videos

- [Recare Overview](#)
- [Scheduling the Next Recare Appointment](#)
- [Scheduling Recare from the Routing Panel](#)
- [Personalizing a Patient's Recare Interval](#)

### Articles

- [Adding recare types](#)
- [Attaching Recare to Patients](#)
- [Cleaning Up Your Recare Types](#)

### Webinar

- [Implement A More Profitable Patient Visit Workflow with the Dentrix Ascend Routing Panel](#)



## RECAP Tool #1: Recare Assignment

<p><b>How to set up recare</b></p>	<ul style="list-style-type: none"> <li>• Setting up recare types</li> <li>• Assigning recare to patients</li> </ul>
<p><b>How to schedule the next recare appointment</b></p>	<ul style="list-style-type: none"> <li>• Scheduling recare from the routing panel</li> <li>• Scheduling recare from the calendar</li> </ul>



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



## Tool #2: Automated Recare Reminders

Set up automated email or text  
recare reminders for your patients

## Benefits of Automated Recare Reminders

-  Automate a time-consuming process
-  Automatically include your online booking link in the reminder
-  Choose to send email or text reminders

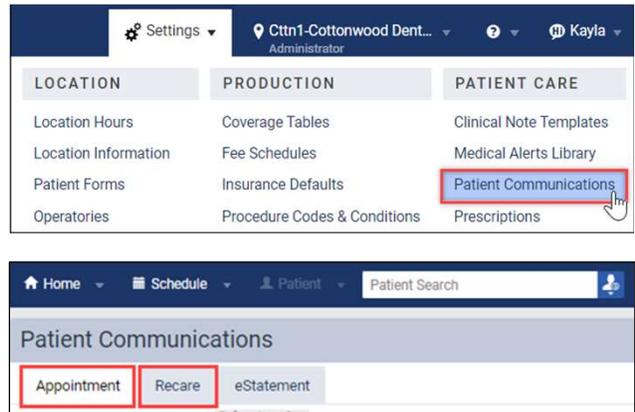
 **DENTRIXASCEND**

## Two Types of Reminders

- From the Settings menu, click **Patient Communications**.

### Two Types of Reminders for Recare

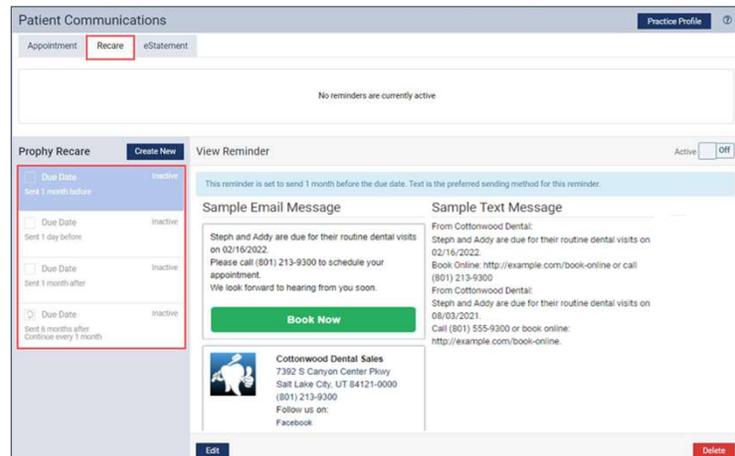
- Appointment:** Sent to patients who have any type of upcoming appointment.
- Recare:** Sent to patients who have a primary recare type set up but who have NOT scheduled an appointment.



## How to Set Up Recare Reminders

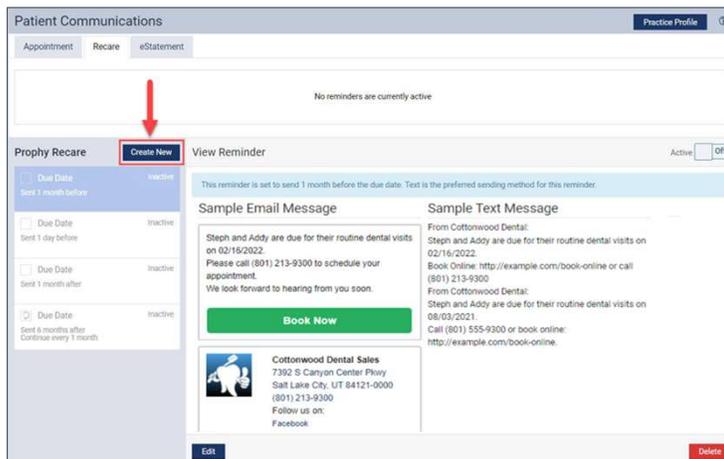
- Select the Recare tab.

**Note:** Dentrix Ascend has some reminders set up for you. Decide whether to create your own reminder or to use one of the existing reminders.



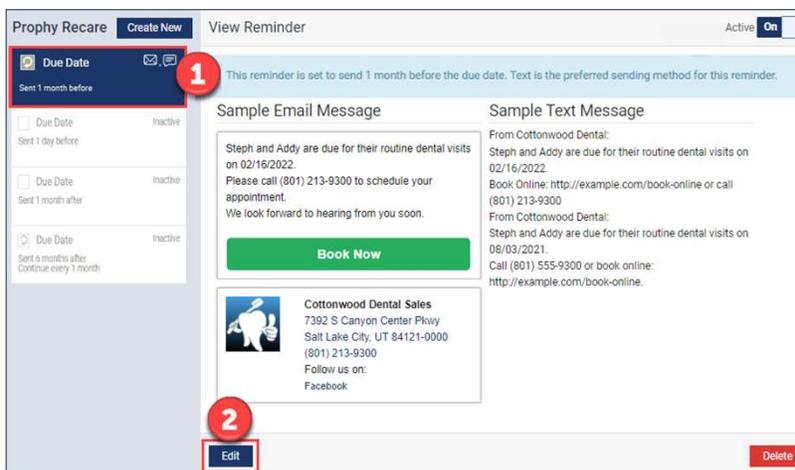
To create your own reminder:

1. Click **Create New**.
2. A wizard guides you through the configuration steps.



To edit an existing reminder:

1. Select the reminder from the list.
2. Click **Edit**.



- Follow the steps in the **Edit Reminder** wizard:
4. Select the Notification Schedule.
  5. Select the Preferred Sending Method.
  6. Customize the Email Message.
  7. Customize the Text Message.
  8. Preview the Practice Information.

Edit Reminder
Active

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

This reminder is set to send 20 weeks before the due date. Continue sending every 3 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**When would you like to send the notification?**

Send Reminder \*

20  +  - weeks  After Due Date  Before Due Date

Exclude automated message  Off

Continue sending  On Repeat every 3  +  - weeks  until Discontinue after 5  +  - notices

scheduled

← Back
Next →
Cancel
Delete

- Follow the steps in the **Edit Reminder** wizard:
4. Select the Notification Schedule.
  5. Select the Preferred Sending Method.
  6. Customize the Email Message.
  7. Customize the Text Message.
  8. Preview the Practice Information.

Edit Reminder
Active

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

This reminder is set to send 20 weeks before the due date. Continue sending every 3 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**Preferred sending method**

Email  Text

If patient does not have a valid email address, we will attempt to send via text message.

← Back
Next →
Cancel
Delete

- Follow the steps in the **Edit Reminder** wizard:
4. Select the Notification Schedule.
  5. Select the Preferred Sending Method.
  6. Customize the Email Message.
  7. Customize the Text Message.
  8. Preview the Practice Information.

**Edit Reminder** Active

Setup steps: [Notification Schedule](#) [Preferred Sending Method](#) **[Email Message](#)** [Text Message](#) [Practice Info](#)

This reminder is set to send 20 weeks before the due date. Continue sending every 3 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**Email message**

Subject \*  
Cottonwood Appointment Scheduling

Automated message ⓘ

Steph and Addy are due for their routine dental visits on 01/20/2022.  
Please call (801) 213-9300 to schedule your appointment.  
We look forward to hearing from you soon.

Custom message ⓘ

Paragraph Verdana Font Sizes

- Follow the steps in the **Edit Reminder** wizard:
4. Select the Notification Schedule.
  5. Select the Preferred Sending Method.
  6. Customize the Email Message.
  7. Customize the Text Message.
  8. Preview the Practice Information.

**Edit Reminder** Active

Setup steps: [Notification Schedule](#) [Preferred Sending Method](#) [Email Message](#) **[Text Message](#)** [Practice Info](#)

This reminder is set to send 20 weeks before the due date. Continue sending every 3 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**Text message**

Automated message ⓘ

From Cottonwood Dental  
Steph and Addy are due for their routine dental visits on 01/20/2022.  
Book Online: <http://example.com/book-online> or call (801) 213-9300

Custom message ⓘ

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

Follow the steps in the

**Edit Reminder** wizard:

4. Select the Notification Schedule.
5. Select the Preferred Sending Method.
6. Customize the Email Message.
7. Customize the Text Message.
8. Preview the Practice Information.

**Edit Reminder** Active

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

This reminder is set to send 20 weeks before the due date. Continue sending every 3 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**Practice info** ⓘ

Email message

**Cottonwood Dental**  
7392 S Canyon Center Pkwy  
Salt Lake City, UT 84121-0000

Tel.  
801-555-1111

Follow us on:  
[Facebook](#)

Text message

Cottonwood Dental  
801-555-1111

After you finish editing the reminder, make sure the Active switcher is turned to On.

**View Reminder** Active

This reminder is set to send 20 weeks before the due date. Continue sending every 4 weeks. Discontinue after 5 notices. Email is the preferred sending method for this reminder.

**Sample Email Message**

Steph and Addy are due for their routine dental visits on 02/16/2022.  
Please call (801) 213-9300 to schedule your appointment.  
We look forward to hearing from you soon.

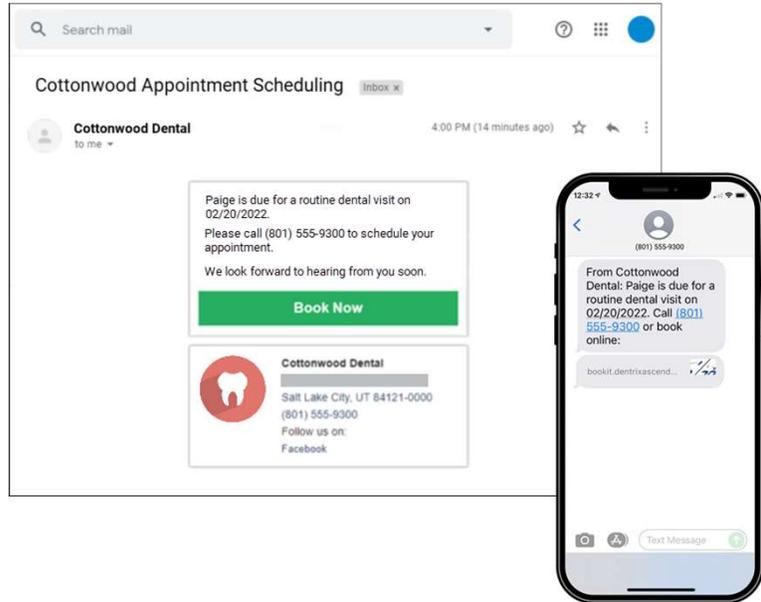
**Book Now**

**Sample Text Message**

From Cottonwood Dental:  
Steph and Addy are due for their routine dental visits on 02/16/2022.  
Book Online: <http://example.com/book-online> or call (801) 213-9300

Patients receive email or text reminders based on:

- Your set up in the Patient Communications page.
- Whether you have valid email addresses or mobile phone numbers for patients.



**DENTRIXASCEND**

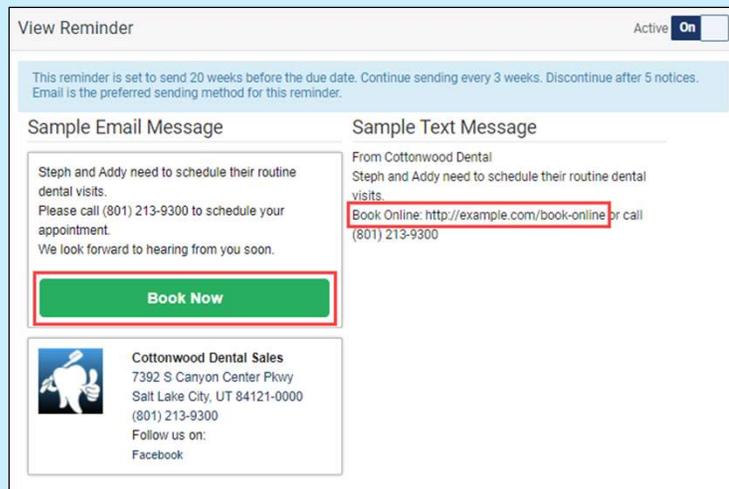


## Tip

### Link to Online Booking

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

**Note:** You must have online booking set up for the booking information to appear.



## Where to Get Help

### Articles

- [Creating recare communications](#)
- [Customizing recare communications](#)
- [Creating appointment communications](#)



## RECAP

### Tool #2: Automated Reminders

#### Two Types of Patient Communications

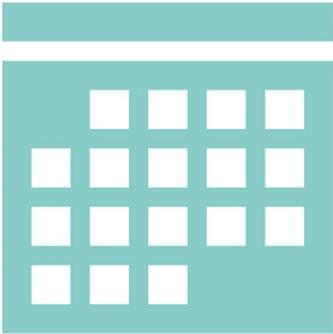
- Appointment
- Recare

#### How to Set Up Recare Reminders

- Creating your own reminders
- Editing existing reminders
- Tip: Include Online Booking Link



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



## Tool #3: Online Booking for Recare

Offer online booking for recare appointments

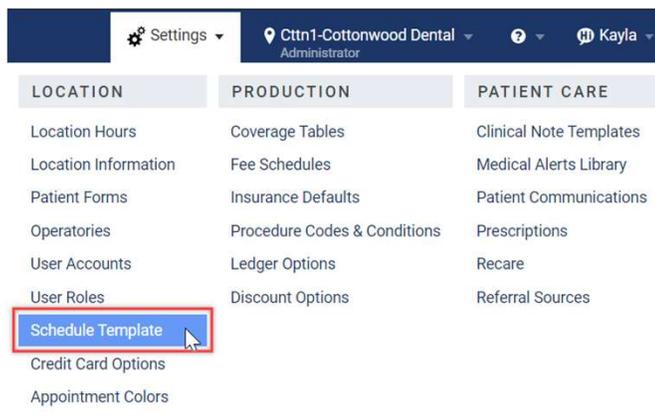
### Online Booking Advantages

	Free up your time for other important tasks		Have your schedule fill itself
	Increase patient satisfaction		Offer 24/7 scheduling

 **DENTRIXASCEND**

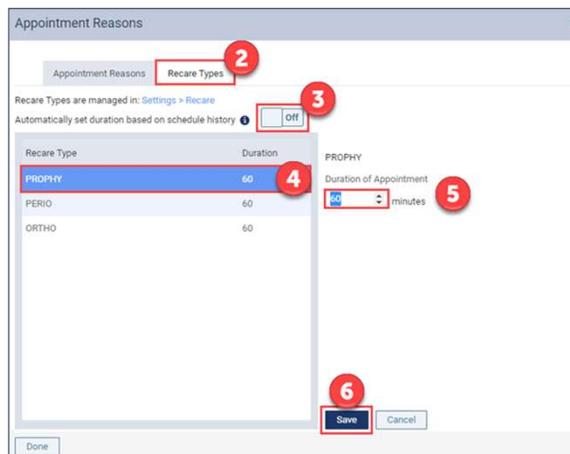
## How to Set Up Online Booking

- From the Settings menu, select **Schedule Template**.
- Requires the Manage Location Information right
  - From the Settings menu select **User Roles**. Click your role, and then locate the Settings category.



## Customize Duration of Recare Appts

1. In the Schedule Template, click **Appointment Reasons**.
2. Select the **Recare Types** tab.
3. Turn the switcher On/Off.
4. Select a Recare Type.
5. Edit the duration.
6. Click Save.



# Adding a Schedule Template

1. Select an operator.

The screenshot shows the 'Schedule Template' interface. At the top, there are navigation tabs: Home, Schedule, Patient, and Patient Search. Below that, there are settings for 'Online Booking' (On), 'Only show first available slot' (Off), and 'Online Utilization'. The main area is a grid with columns for days of the week (Monday to Saturday) and rows for time slots (8AM to 10AM). On the left, there is a 'Filter by Provider' dropdown set to 'All'. Below it is an 'Operator' dropdown menu that is open, showing four options: 1-Tx, 2-Tx, 3-Hygiene, and 4-Hygiene. A red circle with the number '1' is placed over the dropdown menu.

HENRY SCHEIN ONE

DENTRIXASCEND

2. Click and drag to set the time range for your recare appointments.

The screenshot shows a close-up of the 'Schedule Template' interface. The 'Operator' dropdown menu is open, showing the same four options as in the previous screenshot. A red box highlights the 'Monday' column for the 8AM time slot. A red arrow points downwards from the 8AM slot to the 12PM slot, indicating the time range selection for a recare appointment.

HENRY SCHEIN ONE

DENTRIXASCEND

3. Configure the Time Slot dialog box.

The day and date populate based on your selection.

3. Configure the Time Slot dialog box.

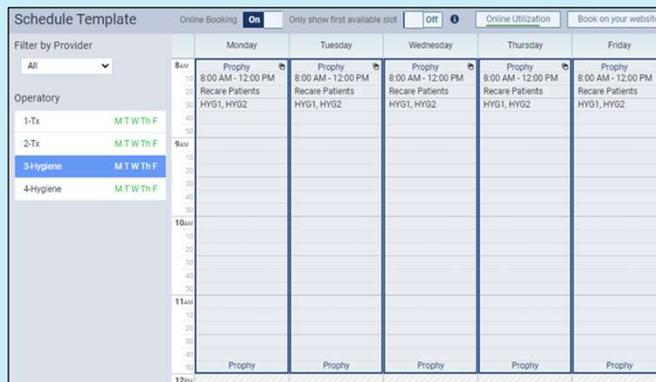
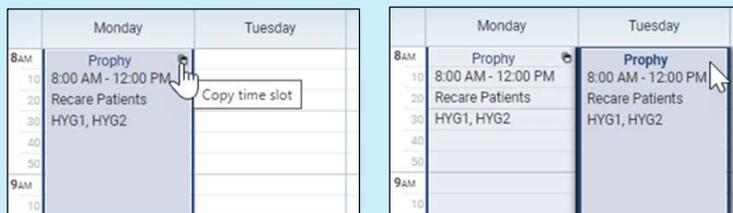
1. Choose Providers
2. Choose Color
3. For appointment type, select **Recare**.
4. For Appointment Reason, select **Routine exam/cleaning**.
5. Click Save



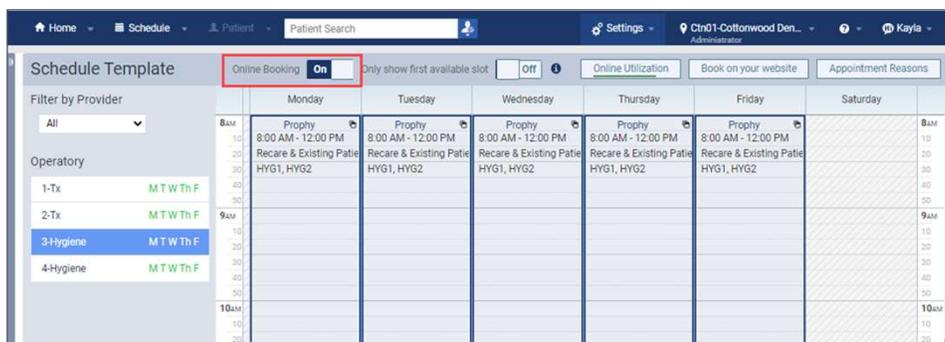
## Tip

Once you have a time block configured, copy it to other days.

1. Click the **Copy time slot** button.
2. Click the time when you want the copied time block to start, in this or another operator.



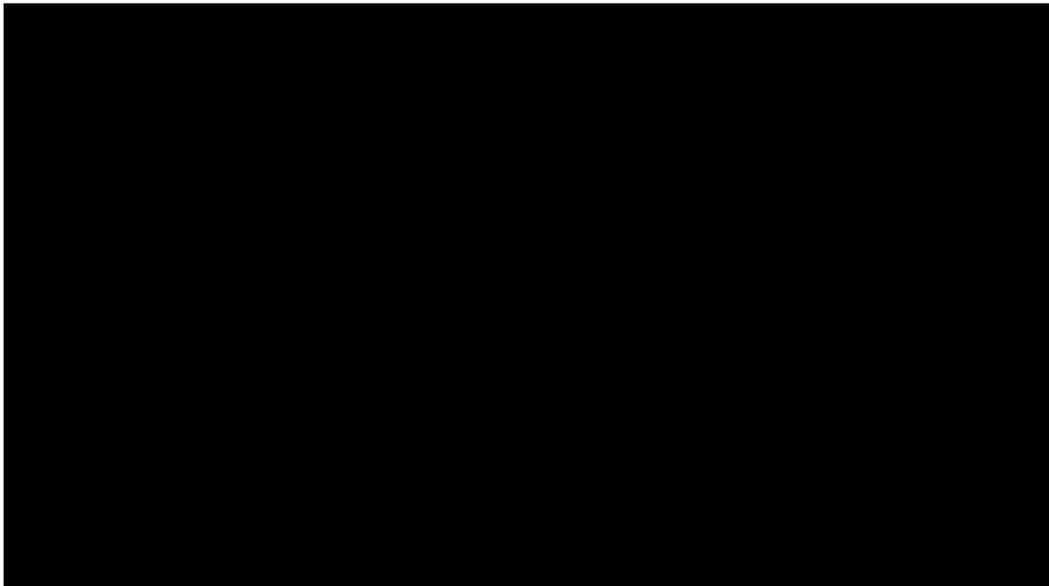
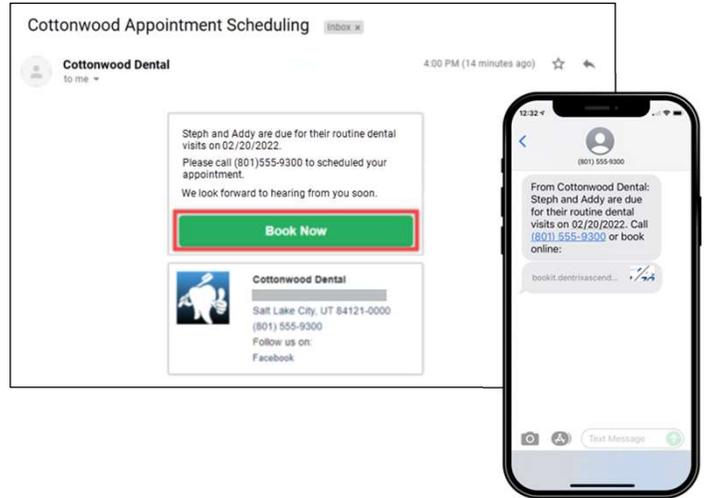
4. The last step is to make sure the Online Booking switcher is turned to On.



## Demo: How Patients Book Recare Online

1. Patients click the [bookit.dentrixascend](https://bookit.dentrixascend.com) link in their text message or the **Book Now** button in their email.
2. Your online booking schedule opens.

**Note:** Patients can only book recare appointments in the time slots and with the providers that you set up.



[Link to Online Booking demo video](#)

## Where to Get Help

### Articles

- [Adding time blocks for a scheduling template](#)
- [Setting up default recare appointment lengths for online booking](#)
- [Online booking overview and workflow](#)

### Video and Webinar

- [Online Booking Overview](#)
- [Make It Easy For Patients to Schedule: Offer Online Booking](#)



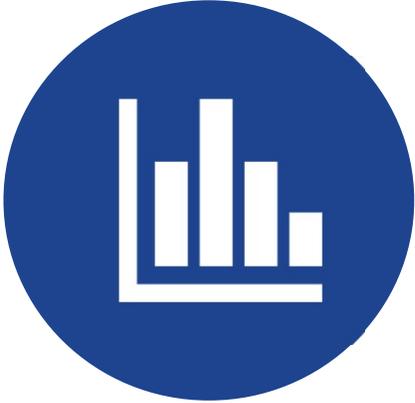
## RECAP

### Tool #3: Online Booking

<b>How to Set Up Online Booking</b>	<ul style="list-style-type: none"> <li>• Adding time blocks</li> <li>• Always retaining control of your schedule</li> </ul>
<b>Demo: How to Set Up Recare Reminders</b>	<ul style="list-style-type: none"> <li>• Access from email or text reminders</li> <li>• Quick and easy booking process</li> </ul>



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



## Using Recare Reports

Use reports to track how you're doing with assigning and scheduling recare.

### 3 Reports to Track Recare

<b>1</b>	<b>Insights Page</b>	<ul style="list-style-type: none"><li>• Visualize your recare numbers at a high level</li></ul>
<b>2</b>	<b>Recare Management</b>	<ul style="list-style-type: none"><li>• See who has recare scheduled and who doesn't</li></ul>
<b>3</b>	<b>Active Patients in Recare</b>	<ul style="list-style-type: none"><li>• Get further insights into your recare</li></ul>

 **DENTRIXASCEND**

## Report #1: Insights Page

- From the **Home** menu, select **Insights**.



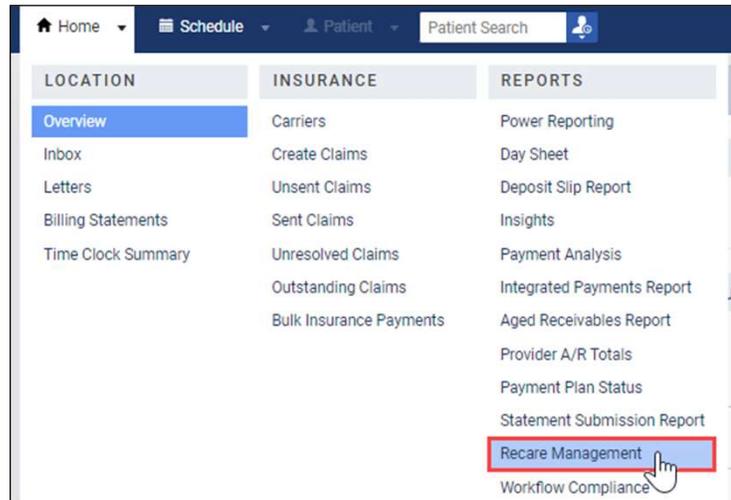
On the Recare module, you see:

- Links to two reports.
- A graph showing how many patients are assigned recare and how many are not.
  - Hover over the bar graph to see more information.



# Report #2: Recare Management

- From the **Home** menu, select **Recare Management**.



Use the filters to see:

- Which patients have recare set up and which don't.
- Which patients have recare scheduled and which don't.



**Tip:** Focus on Primary Recare types to avoid multiple entries for patients.

Recare Management

Filters

Locations

- All
- Cottonwood Dental Sales
- No other locations are selected
- Select Locations

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled

Due Date Range

02/01/2022-08/31/2022

Recare Type

- All
- BITEWINGS
- FLXK
- ORTHO
- PANOREX
- PERIO
- SCREENING

Available Records

Only show active patients  On  Print

Recare Type	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
PROPHY	02/09/2022	Unscheduled	Cham, Percy	Cham, Moly (321) 555-1234	08/06/2019	Type EMAIL 1/5/22
PROPHY	02/09/2022	Unscheduled	Velez, Joel	Velez, Joel (800) 336-8749	11/15/2013	
PERIO	04/30/2022	Unscheduled	Rogers, David	Rogers, David bettylin@gmail.com	01/10/2022	
PERIO	05/28/2022	Unscheduled	Bentley, Paige	Bentley, Candice (555) 888-1111	01/27/2022	
PROPHY	07/28/2022	Unscheduled	Johnson, Myley	Johnson, Myley (801) 833-3744	10/04/2021	Type TEXT 8/13/20
PROPHY	07/28/2022	Unscheduled	Bentley, Paige	Bentley, Candice (555) 888-1111	01/27/2022	
PROPHY	07/28/2022	Unscheduled	Williams, Nicole	Williams, Nicole (385) 555-1271	06/07/2021	
PROPHY	07/28/2022	Unscheduled	Bentley, Jane	Bentley, Candice (555) 888-1111	11/04/2021	
PROPHY	07/28/2022	Unscheduled	Bentley, Brooke	Bentley, Candice (555) 888-1111	11/04/2021	
PROPHY	07/28/2022	Unscheduled	Smith, Andy	Smith, Andy (813) 764-9701	01/25/2022	
PROPHY	07/28/2022	Unscheduled	Clay, Terry	Clay, Rebecca (800) 336-8749	01/26/2022	
PROPHY	07/28/2022	Unscheduled	Dashadi, Daniel	Dashadi, Daniel	11/18/2020	
PROPHY	07/29/2022	Unscheduled	Walker, Corbin	Walker, Corbin (555) 123-4567	08/06/2019	
PROPHY	07/29/2022	Unscheduled	Nielsen, Madeline	Nielsen, Katie (626) 232-9633	12/10/2021	
PROPHY	07/29/2022	Unscheduled	Bush, Reggie	Bush, Moses (800) 336-8749	12/30/2021	

Showing 1 to 35 of 35 entries



## Tip

### Schedule directly from the Recare Management report.

- Click the **Unscheduled** link to schedule a patient's appointment.

Recare Management

Filters

Locations

- All
- Cottonwood Dental Sales

No other locations are selected

Select Locations

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled**

Available Records

Only show active patients  On

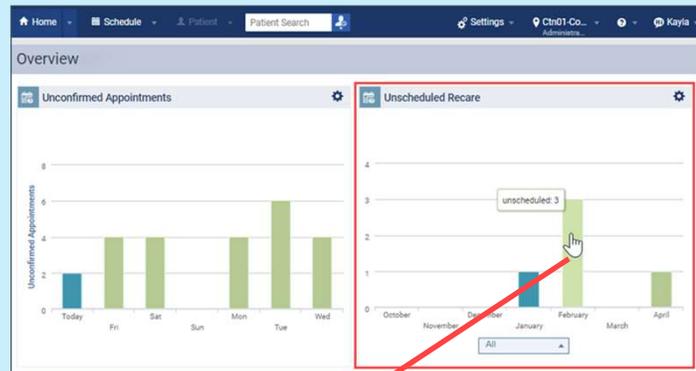
Recare Ty...	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
PROPHY	02/02/2022	<b>Unscheduled</b>	Charm, Percy	Charm, Molly (321) 555-1234	08/06/2019	Type: EMAIL 1/5/22
PROPHY	02/02/2022	Unscheduled	Velez, Joel	Velez, Joel (800) 336-6749	11/15/2013	
PROPHY	07/21/2022	Unscheduled	Johnson, Myley	Johnson, Myley (801) 833-3744	10/04/2021	Type: TEXT 8/13/20
PROPHY	07/21/2022	Unscheduled	Bentley, Candice	Bentley, Candice (555) 888-1111	01/20/2022	
PROPHY	07/21/2022	Unscheduled	Bentley, Paige	Bentley, Candice (555) 888-1111	01/20/2022	
PROPHY	07/21/2022	Unscheduled	Williams, Nicole	Williams, Nicole	01/20/2022	



## Tip

### Access the Recare Management Report from the Overview

- Click a bar on the graph
- Ascend opens the Recare Management report filtered for that month



Recare Management

Filters

Locations

- All
- Cottonwood Dental Sales

No other locations are selected

Select Locations

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled**

Due Date Range

02/01/2022-02/28/2022

Available Records

Only show active patients  On

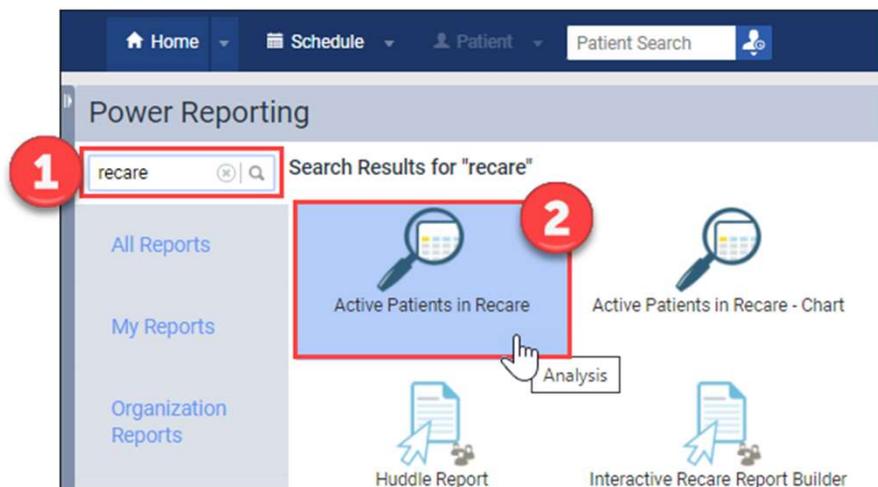
Recare Type	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
PROPHY	02/09/2022	Unscheduled	Charm, Percy	Charm, Molly (321) 555-1234	08/06/2019	Type: EMAIL 1/5/22
PROPHY	02/09/2022	Unscheduled	Velez, Joel	Velez, Joel (800) 900-6749	11/15/2013	
ORTHO	02/28/2022	Unscheduled	Tracy, Camille	Tracy, Camille (801) 555-3744	01/26/2022	

## Report #3: Active Patients in Recare

- From the **Home** menu, select **Power Reporting**.



- Search for "recare".
- Select the report.



- Drill down into your recare data to see what percentage of your patients are assigned recare.

Power Reporting > Active Patients in Recare ← Back Save Data as of: 3:15 PM

View As:

3 Filters

- Month includes current Month and previous 17 Month
- Category includes Procedures
- Revision History includes Current

Rows: 2 Cols: 5

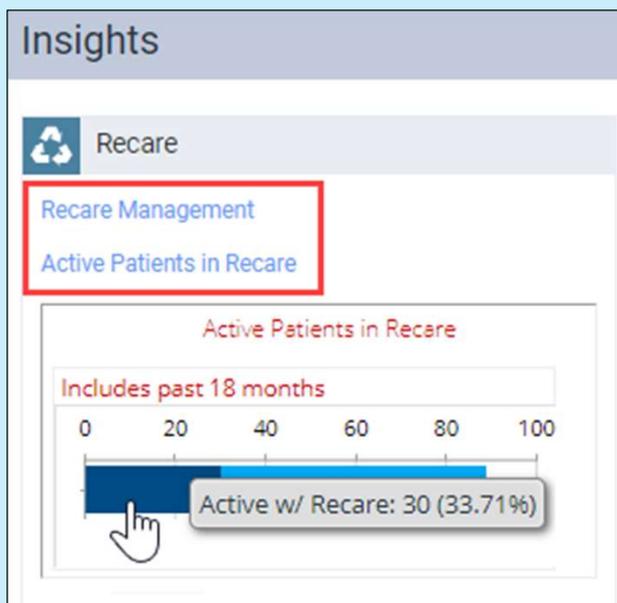
Location	Patients Seen	Active w/ Recare	% in Recare	Perio Patients	% in Perio
Alpine Dental LLC	66	12	18%	1	2%
Cottonwood Dental ...	89	30	34%	0	0%
Grand Total	140	41	29%	1	1%



## Tip

### Shortcut to Recare Reports

- Use the links in the Recare module of the Insights page to access the high-level view and links to two recare reports.



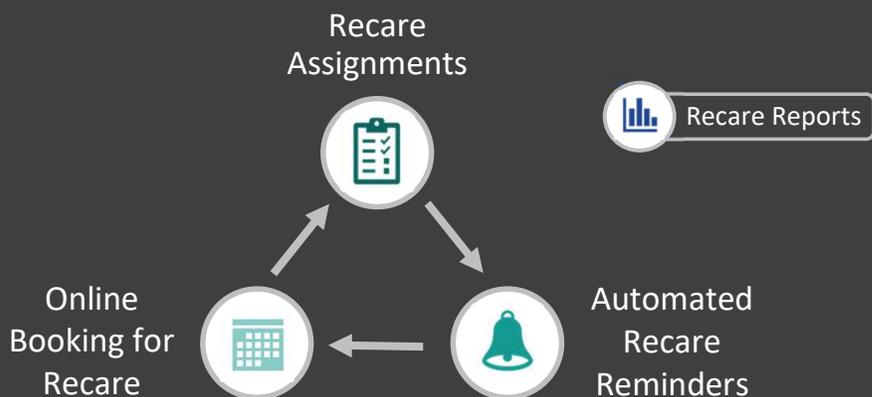
## Where to Get Help

### Articles

- [Contacting Patients Using the Recare Management Report](#)
- [Viewing the Recare Management Report](#)
- [Active Patients in Recare Report](#)



## RECAP: 3 Tools to Master Your Recare Workflow



**DENTRIXASCEND**

Practice Success



# Q&A

Contact Support at 855.232.9493, Option 2  
or email [support@dentrixascend.com](mailto:support@dentrixascend.com).

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

**DENTRIXASCEND**

Practice Success



## Review what you learned

Download a copy of the slides from the Handout panel.



## Expand your learning

Watch this on-demand webinar:  
[Make It Easy For Patients to Schedule: Offer Online Booking](#)



Make it Easy  
for Patients to Schedule:  
Offer Online Booking