

Practice Success



End-of-Year Best Practices

Presenter Information

Katie Nielsen

- Certified Dentrrix trainer for 20 years.
Dentrrix Ascend trainer for 8 years.
- Awarded Dentrrix Ascend Trainer of the Year (2016) and Dentrrix Ascend Spirit award (2018).
- An expert in helping offices create a predictable and profitable workflow for end-of-year tasks in Dentrrix Ascend.



In this webinar:



Finding patients with overdue recare



Finding patients with outstanding treatment and remaining benefits



Updating fee schedules



Completing other end-of-year tasks



Finding Patients with Overdue Recare

- **Finding** patients that are overdue for recare.
- **Contacting** patients that are overdue for recare.

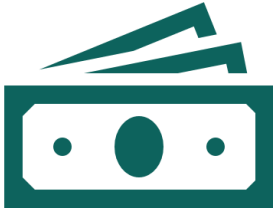
Finding Patients with Overdue Recare

Finding Patients with Outstanding Treatment

Updating Fee Schedules

Completing Other End-of-Year Tasks

Benefits of Finding Patient with Overdue Recare



Helps your practice increase production.



Helps your patients to use their insurance benefits before they lose them.

Recare Management Report

QUICK POLL

The Recare Management report finds patients who are overdue for recare.

Once you find these patients, you can encourage them to come in for treatment.

Recare Management									
Filters		Available Records						Only show active patients <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="button" value="Print"/>	
Locations		Recare Ty...	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted	
<input type="checkbox"/> All		PROPHY	09/28/2022	Unscheduled	Williams, Brayden	Williams, Nicole (385) 555-1271	02/19/2021		
<input checked="" type="checkbox"/> Cottonwood Dental Corp		PROPHY	10/01/2022	Unscheduled	Trainer, Tina	Trainer, Tina nunya@biz.net	10/11/2021	Type: EMAIL 6/13/22	
No other locations are selected <input type="button" value="Select Locations"/>		PROPHY	10/10/2022	Unscheduled	Charm, Percy	Charm, Molly (321) 555-1234	08/06/2019	Type: EMAIL 1/5/22	
Patients		PROPHY	10/10/2022	Unscheduled	Velez, Joel	Velez, Joel (800) 336-8749	11/04/2021		
<input checked="" type="radio"/> With Recare		PERIO	12/29/2022	Unscheduled	Rogers, David	Rogers, David (813) 446-2756	09/27/2022		
<input type="radio"/> No Recare									
Appointment									
<input type="radio"/> All									
<input type="radio"/> Scheduled									

Using the Recare Management Report

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

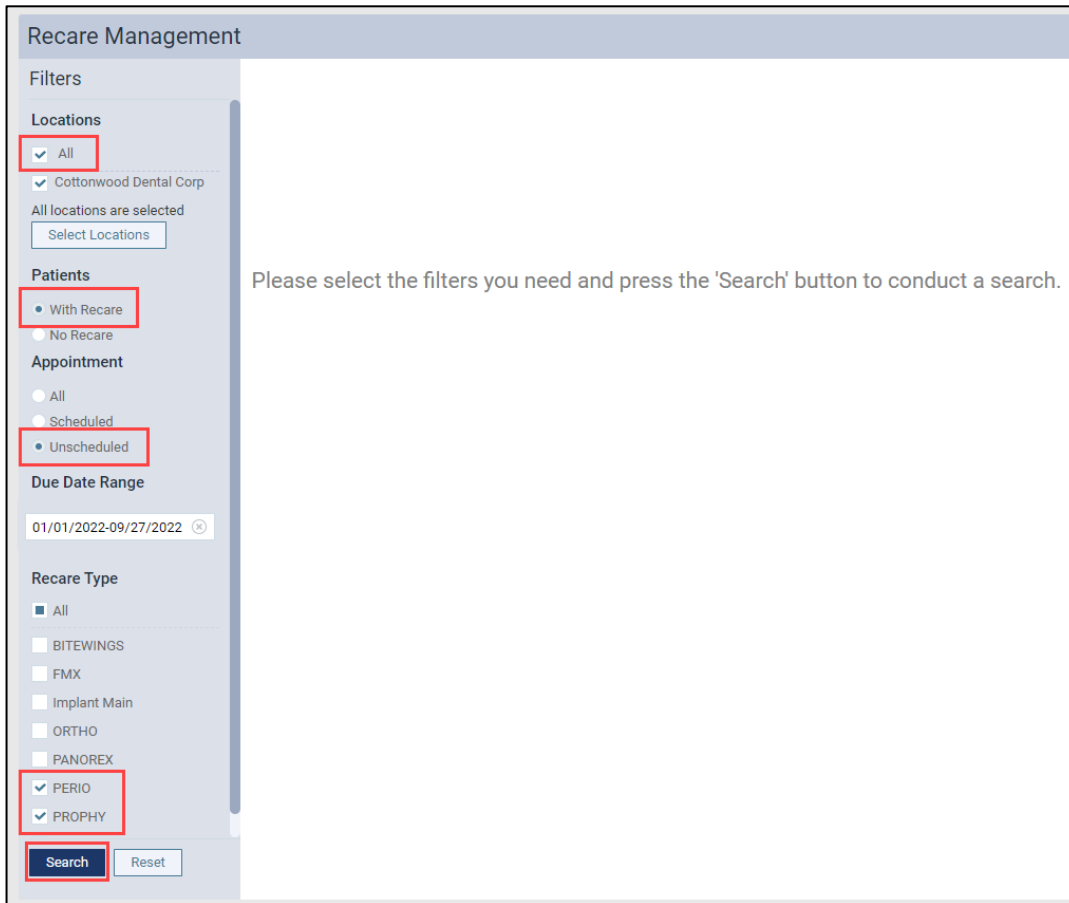
The screenshot displays the Dentrix Ascend software interface. At the top, there is a navigation bar with a dark blue background. On the left, there are three dropdown menus: 'Home' (with a house icon), 'Schedule' (with a calendar icon), and 'Patient' (with a person icon). To the right of these menus is a search bar labeled 'Patient Search' and a user profile icon. Below the navigation bar, the main content area is divided into three columns: 'LOCATION', 'INSURANCE', and 'REPORTS'. The 'REPORTS' column contains a list of report options. The 'Recare Management' option is highlighted with a red rectangular border. The other options in the 'REPORTS' column are: Power Reporting, Day Sheet, Deposit Slip Report, Insights, Payment Analysis, Integrated Payments Report, Aged Receivables Report, Provider A/R Totals, Payment Plan Status, Statement Submission Report, Workflow Compliance, Referral Analysis, and Audit Log.

LOCATION	INSURANCE	REPORTS
Overview	Carriers	Power Reporting
Inbox	Create Claims	Day Sheet
Letters	Unsent Claims	Deposit Slip Report
Billing Statements	Sent Claims	Insights
Time Clock Summary	Unresolved Claims	Payment Analysis
	Outstanding Claims	Integrated Payments Report
	Bulk Insurance Payments	Aged Receivables Report
		Provider A/R Totals
		Payment Plan Status
		Statement Submission Report
		Recare Management
		Workflow Compliance
		Referral Analysis
		Audit Log

2. Set up the following filters:

- **Locations** – Select **All** or select specific locations.
- **Patients** – Select With Recare.
- **Appointment** – Select Unscheduled.
- **Due Date Range** – Enter a date range.
- **Recare Type** – Deselect **All** to clear the check boxes. Then select PERIO and PROPHY.

3. Click **Search**.



The screenshot displays the 'Recare Management' interface. On the left, a sidebar contains filter options for Locations, Patients, Appointment, Due Date Range, and Recare Type. The 'All' option under Locations, 'With Recare' under Patients, 'Unscheduled' under Appointment, and 'PERIO' and 'PROPHY' under Recare Type are highlighted with red boxes. The 'Search' button at the bottom is also highlighted. The main content area on the right contains the text: 'Please select the filters you need and press the 'Search' button to conduct a search.'

Recare Management

Filters

Locations

- All
- Cottonwood Dental Corp

All locations are selected

Select Locations

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled

Due Date Range

01/01/2022-09/27/2022

Recare Type

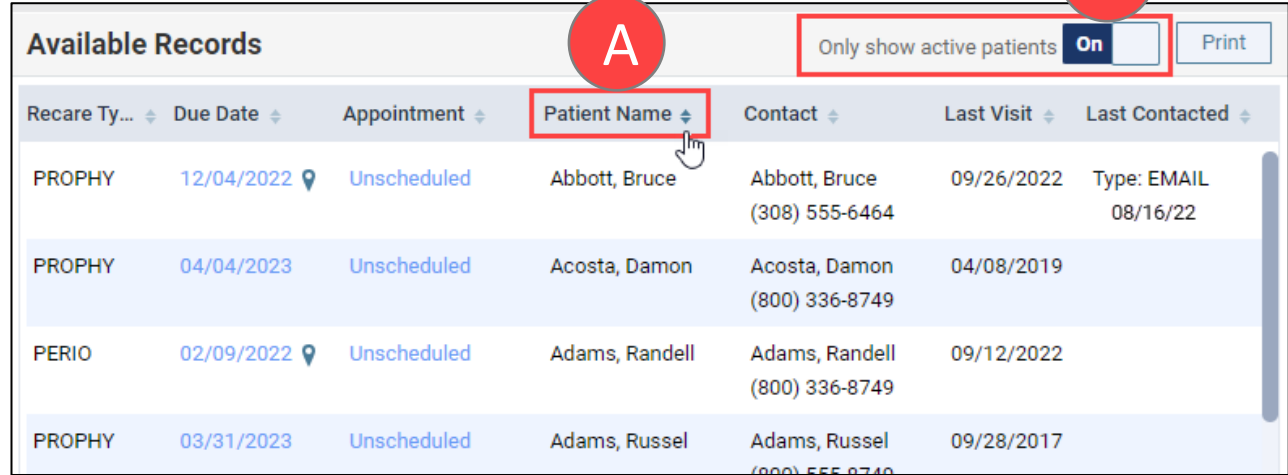
- All
- BITEWINGS
- FMX
- Implant Main
- ORTHO
- PANOREX
- PERIO
- PROPHY

Search Reset

Please select the filters you need and press the 'Search' button to conduct a search.

Report options:

- A. Click the **Patient Name** header to sort by last name and group patients by family.
- B. Set the **Only show active patients** filter
- On – To see only active patients
 - Off – To see active & inactive patients



Recare Ty...	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
PROPHY	12/04/2022	Unscheduled	Abbott, Bruce	Abbott, Bruce (308) 555-6464	09/26/2022	Type: EMAIL 08/16/22
PROPHY	04/04/2023	Unscheduled	Acosta, Damon	Acosta, Damon (800) 336-8749	04/08/2019	
PERIO	02/09/2022	Unscheduled	Adams, Randell	Adams, Randell (800) 336-8749	09/12/2022	
PROPHY	03/31/2023	Unscheduled	Adams, Russel	Adams, Russel (800) 555-8749	09/28/2017	

Note: Inactive patients will appear in gray text.

4. Click **Print** to save report.

Note: The report uses the location in which the last recare was completed rather than the patient's preferred location.

Recare Management

Filters

Locations

- All
- Cottonwood Dental Corp

No other locations are selected

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled

Due Date Range

Recare Type

- All
- BITEWINGS
- FMX
- Implant Main
- ORTHO
- PANOREX
- PERIO
- PROPHY
- SCREENING

Available Records Only show active patients On

Recare Ty...	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
PROPHY	09/28/2022	Unscheduled	Williams, Brayden	Williams, Nicole (385) 555-1271	02/19/2021	
PROPHY	10/01/2022	Unscheduled	Trainer, Tina	Trainer, Tina nunya@biz.net	10/11/2021	Type: EMAIL 6/13/22
PROPHY	10/10/2022	Unscheduled	Charm, Percy	Charm, Molly (321) 555-1234	08/06/2019	Type: EMAIL 1/5/22
PROPHY	10/10/2022	Unscheduled	Velez, Joel	Velez, Joel (800) 336-8749	11/04/2021	
PERIO	12/29/2022	Unscheduled	Rogers, David	Rogers, David (813) 446-2756	09/27/2022	
PERIO	12/29/2022	Unscheduled	Bentley, Tom	Bentley, Candice	01/15/2022	
PERIO	01/28/2023	Unscheduled	Smith, Adam	Smith, Adam (385) 363-7545	09/21/2021	
PROPHY	03/12/2023	Unscheduled	Bentley, James	Bentley, Paige (801) 922-0274	10/18/2021	
PROPHY	03/28/2023	Unscheduled	Johnson, Myley	Johnson, Myley (801) 833-3744	10/04/2021	Type: TEXT 8/13/20
PROPHY	03/28/2023	Unscheduled	Bentley, Jane	Bentley, Candice	02/11/2022	
PROPHY	03/28/2023	Unscheduled	Williams, Nicole	Williams, Nicole (385) 555-1271	06/07/2021	
PROPHY	03/28/2023	Unscheduled	Bentley, Brooke	Bentley, Candice	11/04/2021	
PROPHY	03/28/2023	Unscheduled	Smith, Andy	Smith, Andy (813) 764-6701	09/25/2022	
PROPHY	03/28/2023	Unscheduled	Clay, Terry	Clay, Rebecca (800) 336-8749	09/26/2022	
PROPHY	03/28/2023	Unscheduled	Dashadi, Daniel	Dashadi, Daniel	11/18/2020	

Showing 1 to 42 of 42 entries < Previous 1 Next >

Contacting Patients with Overdue Recare

You can set up a custom communication to contact overdue recare patients on the Patient Communications page.

The screenshot displays the 'Patient Communications' interface. At the top, there are tabs for 'Appointment', 'Recare', and 'eStatement'. Below these is a table with columns for 'Before Due Date' and 'After Due Date', with sub-columns for '30 days', 'Due Date', and '14 days'. A 'Practice Profile' button is in the top right.

The main section is titled 'Prophy Recare' and includes a 'Create New' button. It lists several communication items:

- Due Date, Sent 1 month before, Inactive
- Due Date, Sent 1 day before, Inactive
- Due Date, Sent 2 weeks after, Continue every 4 weeks** (highlighted)
- Due Date, Sent 1 month after, Continue every 1 month, Inactive

A 'View Reminder' section is active, showing a reminder configuration: 'This reminder is set to send 2 weeks after the due date. Continue sending every 4 weeks. Discontinue after 3 notices. Text is the preferred sending method for this reminder.' Below this are 'Sample Email Message' and 'Sample Text Message' sections.

The 'Sample Email Message' section contains the following text:

Steph and Addy are due for their routine dental visits on 09/27/2022. Please call (801) 763-9300 to schedule your appointment. We look forward to hearing from you soon.

Below the text is a green 'Book Now' button.

The 'Sample Text Message' section contains the following text:

From Alpine Dental LLC:
Steph and Addy are due for their routine dental visits on 09/27/2022.
Book Online: <http://example.com/book-online> or call (801) 763-9300

At the bottom of the interface, there are 'Edit' and 'Delete' buttons.

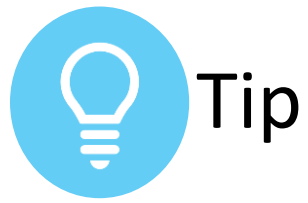


Note: Patient communications are location-specific.

DENTRIXASCEND

Contacting Patients with Overdue Recare

[Contacting Patients with Overdue Recare Video](#)



Learn More about Communicating with Patients in Dentrax Ascend

Watch this webinar:

[3 Keys to Effectively
Communicate with Your
Patients Using Dentrax Ascend
\(June 2022\)](#)





RECAP: Finding Patients with Overdue Recare

Report to Use: Recare Management Report	<ul style="list-style-type: none">• Print the report to use as a reference.
Contacting Patients: Emails/text messages	<ul style="list-style-type: none">• Set up a custom communication on the Patient Communications page.



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

Where to Get Help

Videos

- [Contacting Patients Using the Recare Management Report](#)
- [Setting Up Patient Communications](#)

Articles

- [Finding Patients Overdue for Recare](#)

Courses

- [Online Booking Course](#)

Webinar

- [3 Keys to Effectively Communicate with Your Patients Using Dentrix Ascend \(June 2022\)](#)





Finding Patients with Outstanding Treatment

- Finding patients that have outstanding treatment with remaining benefits.
- Suggestions for contacting patients with remaining benefits.

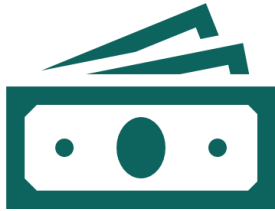
Finding Patients with
Overdue Recare

Finding Patients with
Outstanding Treatment

Updating Fee
Schedules

Completing Other
End-of-Year Tasks

Benefits of Finding Patient with Outstanding Treatment and Remaining Benefits



Helps your practice increase production.



Helps your patients to use their insurance benefits before they lose them.

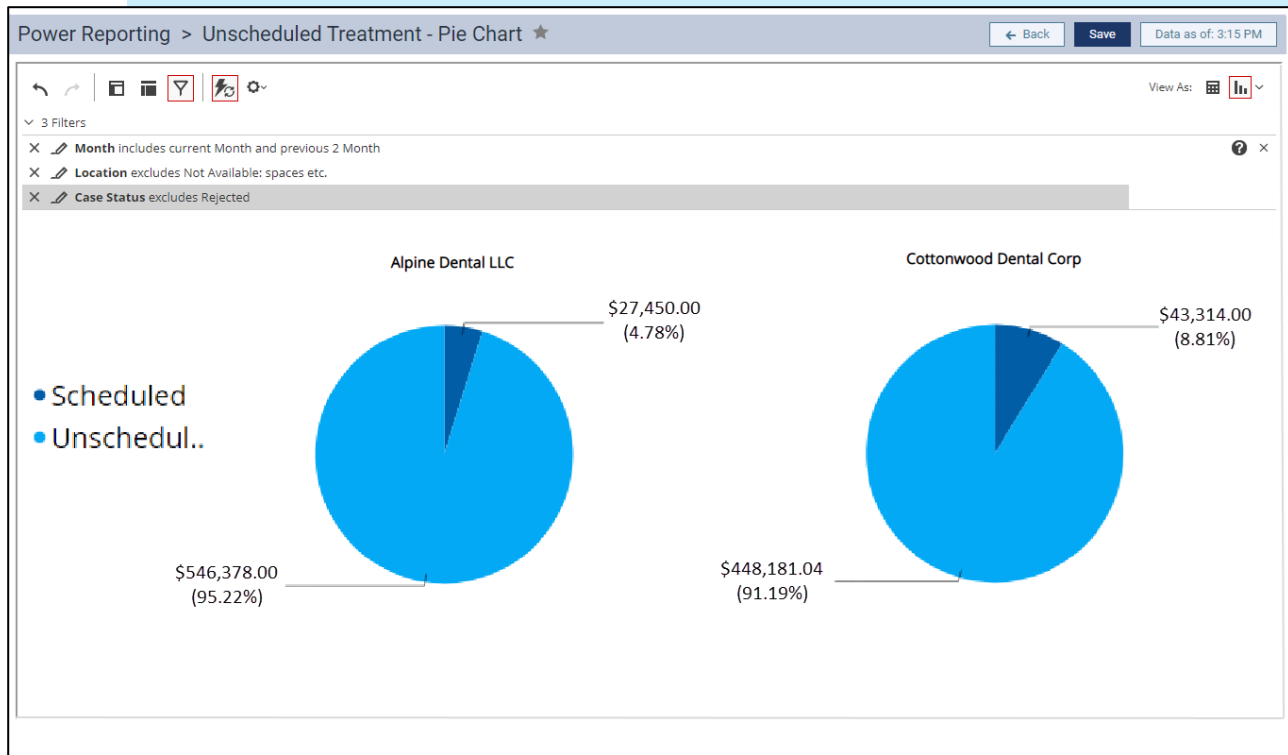


Unscheduled Treatment - Pie Chart

You can see an overview of unscheduled treatment in your practice.

To learn how to generate this report, read

[Unscheduled Treatment - Pie Chart Report.](#)



Unscheduled Treatment Report

QUICK POLL

Find patients with outstanding treatment plans AND remaining benefits.

- Add fields (in red box) to the Interactive Treatment Plan Report Builder
- Apply filters to show:
 - Benefits remaining over a specific amount
 - Procedures treatment-planned within the last 6 months

October 14, 2022 @ 12:00

Unscheduled Treatment

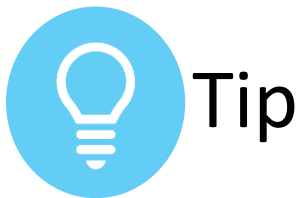
Patient: Baker, Jenny ^		
Email: jenny@gmail.com ^		
Phone: (801) 555-3744 ^		
Remaining Benefits Primary: 1500.0000 ^		
Transaction Date	Proc Alias	Amount
09/07/2022	D2160	\$188.00

Patient: Chiltepin, Isaac ^		
Email: txhotpepper@gmail.com ^		
Phone: (307) 555-7603 ^		
Remaining Benefits Primary: 1200.0000 ^		
Transaction Date	Proc Alias	Amount
09/06/2022	D2392	\$234.00
05/02/2022	D2960	\$655.00
05/02/2022	D2960	\$655.00
05/02/2022	D2960	\$655.00
05/02/2022	D2960	\$655.00
09/07/2022	D2391	\$174.00

DENTRIXASCEND

Finding Patients with Outstanding Treatment
& Remaining Benefits

[Finding Patients with Outstanding Treatment & Remaining Benefits Video](#)



Tip

Learning More about Power Reporting

Visit the [Power Reporting Course](#) at the Dentrix Ascend Academy.

Power Reporting Course



Kayla Minor

Updated 1 month ago

Follow

Duration: 30 minutes



Find the insights you need by customizing pre-built power reports or building reports from scratch.

Review the videos below to learn how to perform tasks related to Power Reports.

Overview	Lesson 1: Power Reporting Overview (9:25) Lesson 2: Understanding Power Reporting Types (article)
Customizing Power Reports	Lesson 3: Adding a Field to a Power Report (article) Lesson 4: Using Filters to Customize your Reports (article) Lesson 5: Understanding Transaction Revisions and Dates (article)
Saving and Exporting Reports	Lesson 6: Saving a Power Report (article) Lesson 7: Exporting a Power Report (article)
Choosing a Report	Lesson 8: Deciding Which Power Report to Use (article)

Contacting Patients with Outstanding Treatment and Remaining Benefits

- Suggestions for contacting patients to get them scheduled:
 - Call patients
 - Send text messages
 - Send letters: by mail or email



You can also use third-party vendors like Mailchimp to send a bulk email to patients.

DENTRIXASCEND®

Patient Engage

Cheryl Munsey

Senior Account Executive, Henry Schein One

Direct Line: (615) 682-0037

Email:

cheryl.munsey@henryscheinone.com



Note: Dentrix Ascend Patient Engage is additional to your Dentrix Ascend subscription.





RECAP: Finding Patients with Outstanding Treatment and Remaining Benefits

Report to Use: Interactive Treatment Plan Report Builder	<ul style="list-style-type: none">• Add fields to the report builder.• Apply filters to make information more useful for end of year.
Contacting Patients: Various	<ul style="list-style-type: none">• Call, send letters by mail or email, and/or send text messages.



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

Where to Get Help

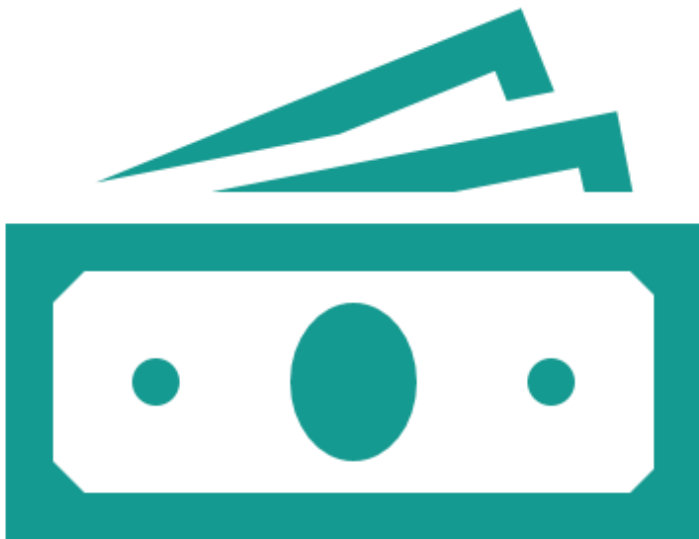
Articles

- [Unscheduled Treatment - Pie Chart Report](#)
- [Finding Patients with Outstanding Treatment and Remaining Benefits](#)

Courses

- [Power Reporting Course](#)





Updating Fee Schedules

- Reasons you should consider updating fees.
- Ways you can update fee schedules in Dentrix Ascend.

Finding Patients with
Overdue Recare

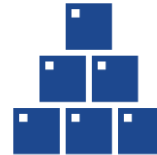
Finding Patients with
Outstanding Treatment

Updating Fee
Schedules

Completing Other
End-of-Year Tasks

Reasons You Should Consider Updating Fee Schedules for the New Year

As time passes and economic conditions change, your practice may need to update fees to keep up with the increased cost of supplies, services, payroll, etc.

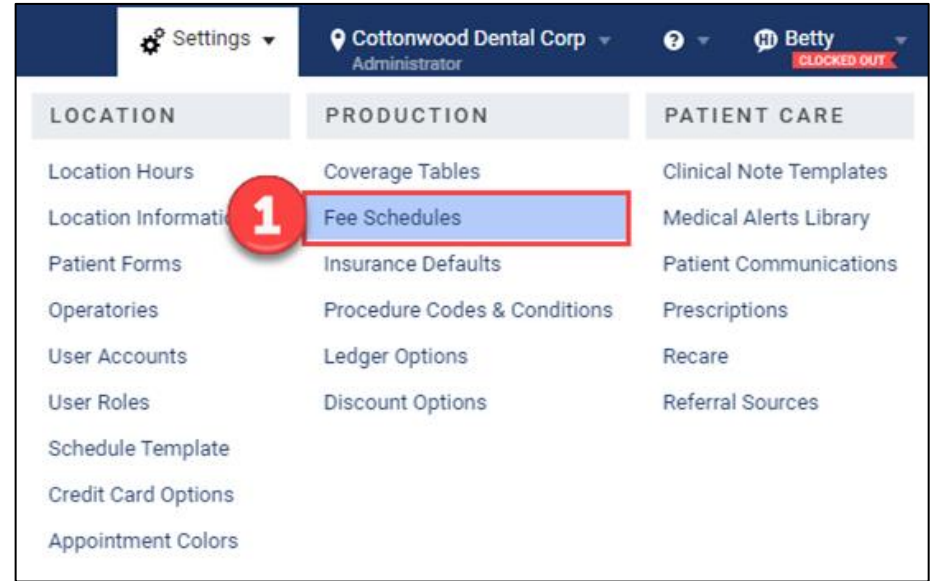


Note: Consultants recommend reviewing your fee schedules annually to ensure you're charging a competitive amount.

Updating Fee Schedules in Dentrix Ascend

Dentrix Ascend allows you to update fee schedules well **before** the new fees take effect, giving you plenty of time to review, discuss, and adjust your fees.

1. From the **Settings** menu, select **Fee Schedules**.



2. Select the name of the fee schedule you want to edit.
3. Click **Set End Date**.

Fee Schedules

List of Fee Schedules Create New

Fees for DeCare - Location-1 Associations

Name of fee schedule *
DeCare - Location-1 **Set End Date** 3

Increase all by
0 \$ Round up resulting values to the nearest dollar Apply

Code	Description	Current Fee	New Fee
Cottonwood	cottonwood product	\$0.00	\$ 0.00
D0120	Periodic Evaluation	\$40.00	\$ 0.00
D0140	Limited Evaluation	\$55.00	\$ 0.00
D0145	Evaluation of Young Patient	\$44.00	\$ 0.00
D0150	Comprehensive Evaluation	\$65.00	\$ 0.00
D0160	Detailed & Extensive Evaluation	\$77.00	\$ 0.00
D0170	Problem Focused Re-Evaluation	\$44.00	\$ 0.00
D0171	Re-eval - Post-op Office Visit	\$0.00	\$ 0.00
D0180	Periodontal Evaluation	\$58.00	\$ 0.00
D0190	Screening of Patient	\$0.00	\$ 0.00
D0191	Assessment of Patient	\$0.00	\$ 0.00

Save Update Fees from File Cancel Delete

DeCare - Location-1 2

4. Select the date when the current fees in this schedule will expire.
5. Click **Set & Save**.

Set End Date for This Version of the Fee Schedule

Information. Setting an end date for this fee schedule version will automatically create a new version of this fee schedule which will start the following date.
Changing the end date for this fee schedule version will also change the start date for the following version of this fee schedule.

Start date (past) — End date MM/DD/YYYY

Set & Save Cancel

DECEMBER							2022	
SUN	MON	TUE	WED	THU	FRI	SAT		
27	28	29	30	1	2	3	\$0.00	\$
4	5	6	7	8	9	10	\$40.00	\$
11	12	13	14	15	16	17	\$55.00	\$
18	19	20	21	22	23	24		
25	26	27	28	29	30	31	\$44.00	\$
1	2	3	4	5	6			

Set End Date for This Version of the Fee Schedule

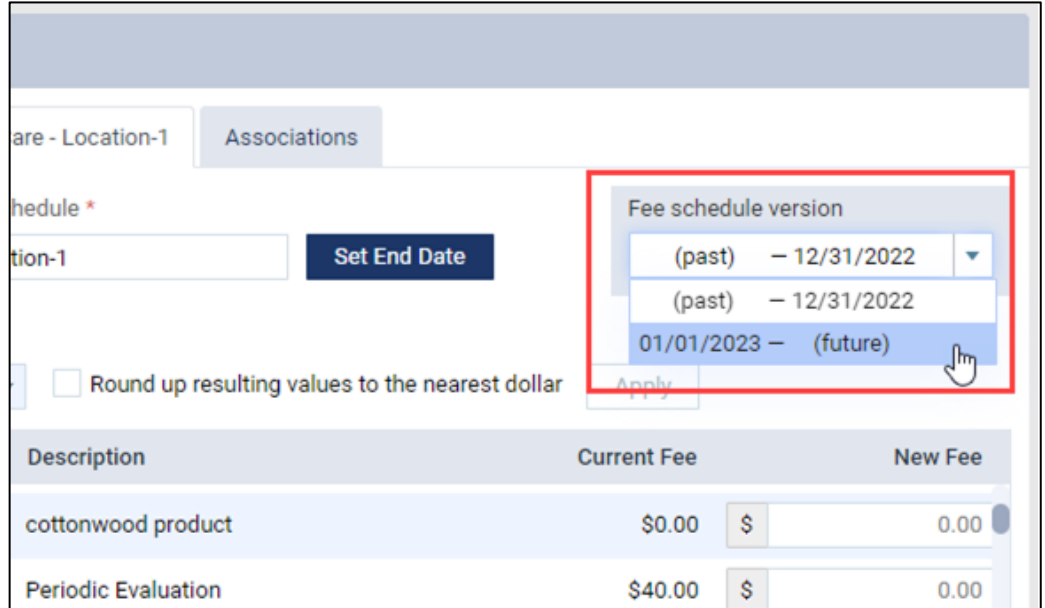
Information. Setting an end date for this fee schedule version will automatically create a new version of this fee schedule which will start the following date.
Changing the end date for this fee schedule version will also change the start date for the following version of this fee schedule.

Start date (past) — End date 12/31/2022

Set & Save Cancel

6. Select Fee schedule version.

IMPORTANT: Note that the new version of the fee schedule takes effect the day after the end date.



are - Location-1 Associations

chedule *

tion-1

Fee schedule version

- (past) - 12/31/2022
- (past) - 12/31/2022
- 01/01/2023 - (future)

Round up resulting values to the nearest dollar

Description	Current Fee	New Fee
cottonwood product	\$0.00	\$ 0.00
Periodic Evaluation	\$40.00	\$ 0.00

7. Update your fee schedule.

You have three options:

- A. Increase all fees by a fixed amount or by a percentage.
 - a. Round up resulting values to the nearest dollar.
- B. Manually update fees by procedure code.
- C. Import a fee schedule from file.

Fee Schedules

List of Fee Schedules Create New

Fees for DeCare - Location-1 Associations

Name of fee schedule * DeCare - Location-1 Set End Date

Fee schedule version 01/01/2023 - (future)

Increase all by 0 \$ Round up resulting values to the nearest dollar Apply

Code	Description	Current Fee	New Fee
Cottonwood	cottonwood product	\$0.00	\$ 0.00
D0120	Periodic Evaluation	\$40.00	\$ 0.00
D0140	Limited Evaluation	\$55.00	\$ 0.00
D0145	Evaluation of Young Patient	\$44.00	\$ 0.00
D0150	Comprehensive Evaluation	\$65.00	\$ 0.00
D0160	Detailed & Extensive Evaluation	\$77.00	\$ 0.00
D0170	Problem Focused Re-Evaluation	\$44.00	\$ 0.00
D0171	Re-eval - Post-op Office Visit	\$0.00	\$ 0.00
D0180	Periodontal Evaluation	\$58.00	\$ 0.00
D0190	Screening of Patient	\$0.00	\$ 0.00
D0191	Assessment of Patient	\$0.00	\$ 0.00

Update Fees from File Cancel Delete

Increasing all Fees by a Fixed Amount or by a Percentage

1. Under **Increase all by**, enter a positive or negative number
2. Then select **\$** or **%**.
3. Select whether you want to round up the new fees.
4. Click **Apply**. The resulting fees appear in the New Fee column.
5. Click **Save**.

The screenshot shows a web interface for managing fee schedules. The main heading is 'Fees for DeCare - Location-1'. Below this, there are tabs for 'Fees for DeCare - Location-1' and 'Associations'. The 'Name of fee schedule' is 'DeCare - Location-1', and the 'Fee schedule version' is '01/01/2023 - (future)'. The 'Increase all by' field is set to '0' with a dropdown menu showing '\$' selected. There is a checkbox for 'Round up resulting values to the nearest dollar' which is currently unchecked. An 'Apply' button is visible. Below this is a table with the following data:

Code	Description	Current Fee	New Fee
D0120	Periodic Evaluation	\$41.00	\$ 0.00
D0140	Limited Evaluation	\$57.00	\$ 0.00
D0145	Evaluation of Young Patient	\$45.00	\$ 0.00
D0150	Comprehensive Evaluation	\$67.00	\$ 0.00
D0160	Detailed & Extensive Evaluation	\$79.00	\$ 0.00
D0170	Problem Focused Re-Evaluation	\$45.00	\$ 0.00
D0171	Re-eval - Post-op Office Visit	\$0.00	\$ 0.00
D0180	Periodontal Evaluation	\$60.00	\$ 0.00
D0190	Screening of Patient	\$0.00	\$ 0.00
D0191	Assessment of Patient	\$0.00	\$ 0.00

At the bottom of the interface, there are buttons for 'Save', 'Update Fees from File', 'Cancel', and 'Delete'.

[Updating Fee Schedules Video](#)

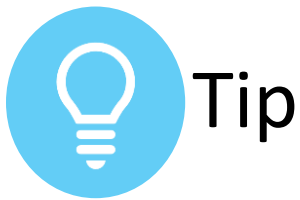
Manually Updating Fees by Procedure Code

This works well if you only have a few procedure fees to update.

1. Find the procedure code you want to update.
2. Enter the **new fee** under the **New Fee** column.
3. Click **Save**.

The screenshot shows the 'Fees for DeCare - Location-1' page in the Dentrix Ascend software. The page has a sidebar on the left with a 'Schedules' section containing a 'Create New' button. The main content area is titled 'Fees for DeCare - Location-1' and includes a 'Name of fee schedule' field set to 'DeCare - Location-1', a 'Set End Date' button, and a 'Fee schedule version' dropdown set to '01/01/2023 - (future)'. Below this is an 'Increase all by' section with a value of '0', a currency selector '\$', a checkbox for 'Round up resulting values to the nearest dollar', and an 'Apply' button. The main table lists procedure codes and their descriptions, with columns for 'Current Fee' and 'New Fee'. The 'New Fee' column is highlighted with a red box and a '1' in a red circle. The 'New Fee' values for 'D0120' (50.00) and 'D0140' (65.00) are highlighted with red boxes and a '2' in a red circle. The 'Save' button at the bottom is highlighted with a red box and a '3' in a red circle. The 'Delete' button is also visible at the bottom right.

Code	Description	Current Fee	New Fee
Cottonwood	cottonwood product	\$0.00	0.00
D0120	Periodic Evaluation	\$40.00	50.00
D0140	Limited Evaluation	\$55.00	65.00
D0145	Evaluation of Young Patient	\$44.00	0.00
D0150	Comprehensive Evaluation	\$65.00	0.00
D0160	Detailed & Extensive Evaluation	\$77.00	0.00
D0170	Problem Focused Re-Evaluation	\$44.00	0.00
D0171	Re-eval - Post-op Office Visit	\$0.00	0.00
D0180	Periodontal Evaluation	\$58.00	0.00
D0190	Screening of Patient	\$0.00	0.00
D0191	Assessment of Patient	\$0.00	0.00



Locating a Procedure Fee in Seconds

1. Press **Control + F** on your keyboard.
2. Type the code or procedure name in the browser search bar.
3. Change the procedure fee(s).
4. Click **Save**.

Fees for DeCare - Location-1

Name of fee schedule *
DeCare - Location-1

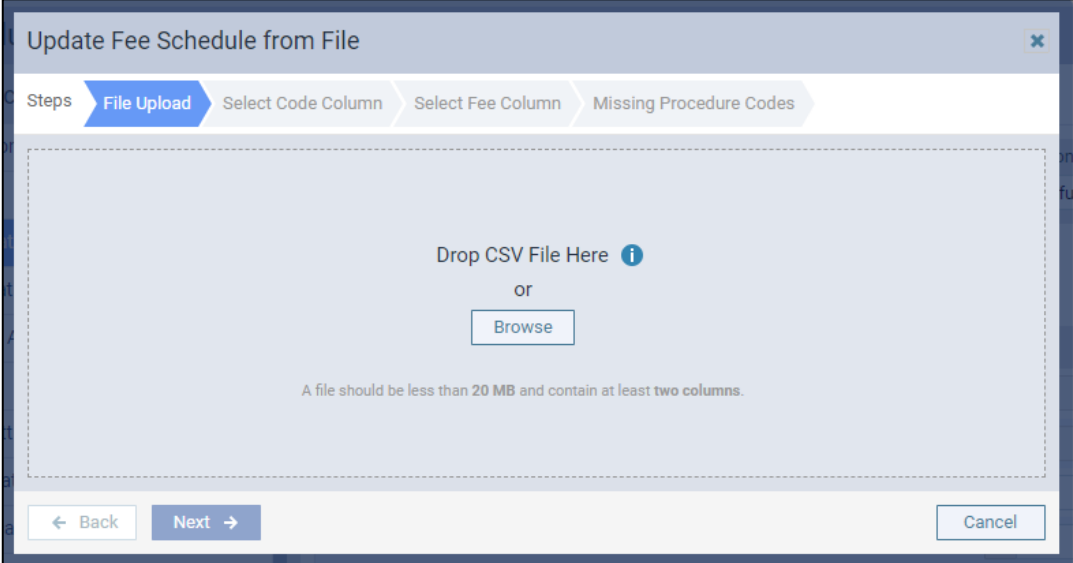
Fee schedule version
(past) - 12/31/2022

Increase all by
0 \$ Round up resulting values to the nearest dollar

Code	Description	Current Fee	New Fee
D6601	Retainer inlay - porcelain/ceramic, three or more surfa...	\$673.00	723.00
D6602	Retainer inlay - cast high noble metal, two surfaces	\$610.00	660.00
D6603	Retainer inlay - cast high noble metal, three or more s...	\$703.00	753.00
D6604	Retainer inlay - cast predominantly base metal, two s...	\$549.00	599.00
D6605	Retainer inlay - cast predominantly base metal, three ...	\$576.00	626.00
D6606	Retainer inlay - cast noble metal, two surfaces	\$571.00	621.00
D6607	Retainer inlay - cast noble metal, three or more surfac...	\$686.00	736.00
D6608	Retainer onlay - porcelain/ceramic, two surfaces	\$720.00	0.00
D6609	Retainer onlay - porcelain/ceramic, three or more surf...	\$799.00	0.00
D6610	Retainer onlay - cast high noble metal, two surfaces	\$751.00	0.00

Importing Fee Schedules from File

You can import a fee schedule to update or add fees. Dentrix Ascend supports the uploading of .csv files (comma-delimited text files).



The screenshot shows a web interface titled "Update Fee Schedule from File". At the top right is a close button (X). Below the title is a progress bar with four steps: "File Upload" (highlighted in blue), "Select Code Column", "Select Fee Column", and "Missing Procedure Codes". The main area is a large dashed box containing the text "Drop CSV File Here" with an information icon (i), followed by "or" and a "Browse" button. Below this, a note states: "A file should be less than 20 MB and contain at least two columns." At the bottom, there are three buttons: "Back" (with a left arrow), "Next" (with a right arrow), and "Cancel".

DENTRIXASCEND

Importing Fee Schedules from File

[Importing a Fee Schedule from File Video](#)



RECAP

Updating Fee Schedules

3 Options to Update Fee Schedules

- Increase all fees by a fixed amount or by a percentage.
- Manually edit a procedure code.
- Import a fee schedule from file.

Reminders

- Set the Start and End Date
- Fee schedule update will not change procedures already posted or submitted to insurance.



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

Where to Get Help

Videos

- [Updating Fee Schedules from File](#)

Articles

- [Prepping New Fee Schedules for Launch](#)
- [Updating fee schedules](#)
- [Importing fee schedules](#)
- [Updating a Procedure Fee in Seconds](#)





Completing Other End-of-Year Tasks

- Setting up your calendar for the new year.
- Handling HSA and FSA receipt requests.
- Cleaning up your database.

Finding Patients with
Overdue Recare

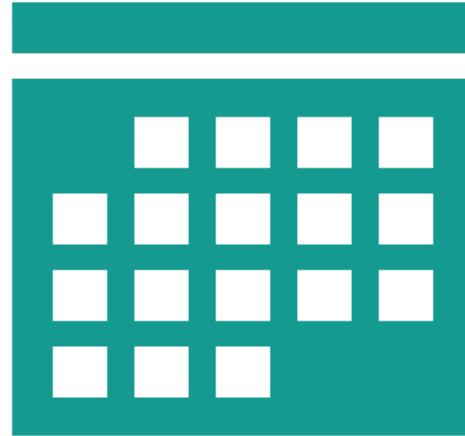
Finding Patients with
Outstanding Treatment

Updating Fee
Schedules

Completing Other
End-of-Year Tasks

Setting Up Your Calendar for the New Year

- You should set up events in the Calendar now to block the schedule for 2023.
- Consider the following situations:
 - Holidays
 - Staff vacations
 - Staff meetings
 - Conferences that your staff will attend



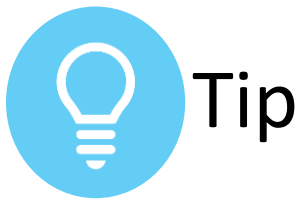
Note: This will avoid having to move appointments booked far in the future like hygiene.

Example: Adding a Holiday to the Calendar

1. Click the timeslot.
2. Click **Create Event**.
3. Enter an event **title**.
4. Select all **operatories**.
5. Check **All day event**.
6. Click **Save**.

The screenshot shows a calendar application interface for Monday 29. The top navigation bar includes 'Today', navigation arrows, 'May 2023', and view options for '1 w', '1 m', and '6 m'. There are also buttons for 'Pinboard', 'View', 'Actions', and 'Print'. A search bar is located on the left. The main area is a grid with columns for operatories '2-Tx', '3-Hygiene', '4-Hygiene', and '5'. The rows represent time slots from 8 AM to 12 PM. A mouse cursor is positioned over the 9 AM slot in the '3-Hygiene' column. The grid cells are currently empty, indicating no events are scheduled.

[Scheduling an All-Day Event Video](#)



Tip

Select All Operators

You can select all operators when you are scheduling an event.

1. Click the operator dropdown.
2. Check All operators.
3. Click **Apply Selected**.

A screenshot of a calendar application interface. The main calendar view shows a grid for Monday, May 29, 2023. Three shaded rectangular areas are highlighted with black boxes, each containing the text 'Closed for Memorial Day'. To the right, a sidebar panel is open for editing an event titled 'Closed for Memorial Day'. The 'Operator' dropdown menu is expanded, showing a list of operators: 'All selected', '1-Tx', '2-Tx', '3-Hygiene', '4-Hygiene', '5-Hygiene', and 'Apply Selected'. Three red circles with white numbers are overlaid on the interface: '1' is on the 'Operator' dropdown arrow, '2' is on the 'Apply Selected' option, and '3' is on the 'Apply Selected' button at the bottom of the sidebar. The sidebar also includes fields for 'Title', 'Description', 'Provider', 'event', and 'Length (hh:mm)'. At the bottom of the sidebar are 'Save' and 'Cancel' buttons.

Handling HSA and FSA Receipt Requests

It's common for patients to request an HSA and FSA receipt for tax purposes.

In Dentrix Ascend, you can complete this task by generating a patient statement of account.

Chart # R0000098

STATEMENT OF ACCOUNT

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

GUARANTOR / RESPONSIBLE PARTY

David Rogers
123 Main Street
Anytown GA 55555

PLEASE PAY THIS AMOUNT	AMOUNT ENCLOSED
\$ 72.38	

BILLING DATE	DUE DATE
09/30/2022	

To ensure proper recording of your payment, please detach and return this portion of the statement with your payment

Please retain this portion of the statement for your own records

DATE	DESCRIPTION	PATIENT NAME	AMOUNT	BALANCE
12/31/2021	Balance Forward			638.60
02/19/2021	Primary dental insurance claim Georgia-Pacific [\$68.00] Claim status: UNPAID			
04/28/2022	Insurance Adjustment \$68.00	David Rogers	-68.00	570.60
02/23/2021	Primary dental insurance claim Georgia-Pacific [\$1685.00] Claim status: UNPAID			
04/28/2022	Insurance Adjustment \$785.00	David Rogers	-785.00	-214.40
01/10/2022	D2140 - Amalgam 1 Surface Th: 2(M) **	David Rogers	85.20	-129.20
01/10/2022	Primary dental insurance claim Georgia-Pacific [\$85.20] Claim status: UNPAID			
09/07/2022	Cash Payment \$500.00*	David Rogers	-17.04	-146.24

To generate a patient statement of account:

1. Search for and select the patient.
2. From the **Patient** menu, under **Financial**, select **Billing Statement**.

The screenshot displays the DENTRIX ASCEND software interface. At the top, a dark blue header bar contains a 'Patient' dropdown menu with a plus sign, the name 'David Rogers', a red circle with the number '1' over a user icon, a 'Settings' gear icon, and the text 'Cottonwood Administrator'. Below the header, the interface is organized into four main sections: GENERAL, INSURANCE, FINANCIAL, and CLINICAL. The 'FINANCIAL' section is highlighted with a red box, and the 'Billing Statement' option within it is also highlighted with a red box and a red circle with the number '2'.

GENERAL	INSURANCE	FINANCIAL	CLINICAL
Overview	Insurance Information	Ledger	Chart
Patient Information	Insurance Claims	Billing Statement	Progress Notes
Appointments			Quick Exam
Medical Alerts			Perio
Recare			Treatment Planner
Prescriptions			Imaging
Document Manager			Print Clinical Report
Patient Connection			
Letter to Patient			

3. Under **Statement start date**, select **Other**.
4. Type or select a **date**.
5. Under **Statement view**, select one of the following options:
 - **Guarantor View** – Include transactions for the current patient and all patients who have the same guarantor as the current patient.
 - **Patient View** – Include transactions only for the current patient.

ent + David Rogers Settings Cottonwood Administrator

Billing Statement

Statement start date: Statement view:

From last zero balance Other 01/01/2022 Walko

Statement

Guarantor view Patient view

Include credit card payment options include location abbreviation

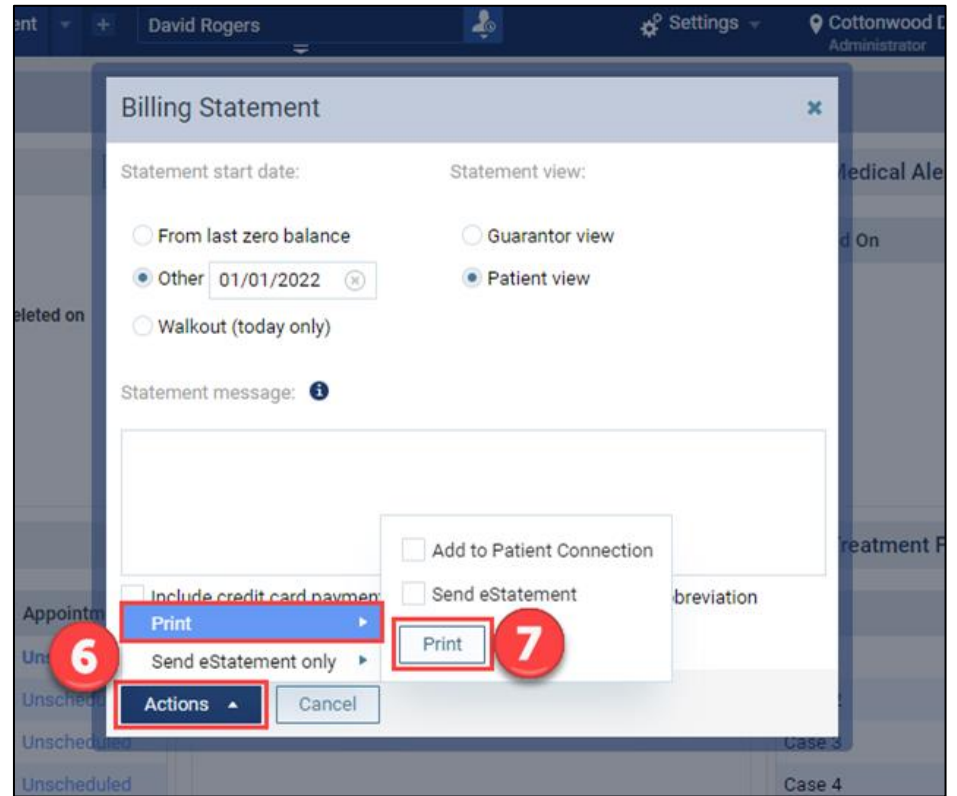
Include due date as

Actions Cancel

SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

6. Click **Actions** and then click **Print**.

7. Click **Print**.



When you click Print, the Statement of Account opens in a new browser tab.

9. Click **Print**.

individual 1 / 2 100% Print

STATEMENT OF ACCOUNT Chart # R0000098

Cottonwood Dental Corp
7392 S Canyon Center Plwy
Salt Lake City, UT 84121-0000

GUARANTOR / RESPONSIBLE PARTY
David Rogers
123 Main Street
Anytown GA 55555

PLEASE PAY THIS AMOUNT \$-72.36 AMOUNT ENCLOSED

BILLING DATE 09/30/2022 DUE DATE 10/30/2022

To ensure proper recording of your payment, please detach and return this portion of the statement with your payment

Please retain this portion of the statement for your own records

DATE	DESCRIPTION	PATIENT NAME	AMOUNT	BALANCE
01/03/2020	Balance Forward			0.00
01/10/2022	D2140 - Amalgam 1 Surface Th: 2(M)**	David Rogers	85.20	85.20
01/10/2022	Primary dental insurance claim Georgia-Pacific [\$85.20] Claim status: UNPAID			
09/07/2022	Cash Payment \$500.00*	David Rogers	-17.04	68.16
02/23/2022	D0274 - Bitewing Four Images**	David Rogers	125.00	193.16
02/23/2022	Primary dental insurance claim Georgia-Pacific [\$125.00] Claim status: UNPAID			
04/28/2022	Insurance Adjustment \$125.00	David Rogers	-125.00	68.16
03/04/2022	D0220 - Intraoral Periapical Images**	David Rogers	28.00	96.16
03/04/2022	Primary dental insurance claim Georgia-Pacific [\$28.00] Claim status: UNPAID			
04/28/2022	Insurance Adjustment \$10.00	David Rogers	-10.00	86.16
03/09/2022	D0274 - Bitewing Four Images	David Rogers	125.00	211.16
09/07/2022	Cash Payment \$500.00*	David Rogers	-125.00	86.16
03/17/2022	D2750 - Porcelain/HNM Crown Th: 13**	David Rogers	1,685.00	1,771.16
03/17/2022	Primary dental insurance claim Georgia-Pacific [\$1685.00] Claim status: UNPAID			
04/28/2022	Insurance Adjustment \$785.00	David Rogers	-785.00	986.16
09/07/2022	Cash Payment \$500.00*	David Rogers	-210.84	775.32
05/05/2022	D0274 - Bitewing Four Images**	David Rogers	70.00	845.32
05/05/2022	Primary dental insurance claim Georgia-Pacific [\$70.00] Claim status: UNPAID			
05/25/2022	Insurance Adjustment \$70.00	David Rogers	-70.00	775.32
09/07/2022	D2740 - Full Porcelain/Ceramic Crown Th: 2	David Rogers	1,256.00	2,031.32

Cleaning Up Your Database

Two easy ways you can clean up your Dentrix Ascend database:

1. Identify inactive patients and decide how to handle them
2. Clean up your Recare Setup and remove unwanted recare types.

Status

- Active
- Active
- Non-Patient
- Inactive
- Duplicate

Recare Setup

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

Edit Recare Information

*Type:

Description:

Interval:

Primary Recare Type

Procedures:

-
-

Identifying Inactive Patients

The **Patients Not Recently Seen** Report lists patients who have not received treatment since a specified date.

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

The screenshot displays the DENTRIX ASCEND software interface. At the top, there is a navigation bar with a 'Home' dropdown menu, a 'Schedule' dropdown menu, a 'Patient' dropdown menu, and a 'Patient Search' input field. Below the navigation bar, there are three main sections: 'LOCATION', 'INSURANCE', and 'REPORTS'. The 'REPORTS' section is highlighted with a red box, and the 'Power Reporting' option is highlighted with a red circle containing the number '1'.
















LOCATION	INSURANCE	REPORTS
Overview	Carriers	Power Reporting
Inbox	Create Claims	Day Sheet
Letters	Unsent Claims	Deposit Slip Report
Billing Statements	Sent Claims	Insights
Time Clock Summary	Unresolved Claims	Payment Analysis
	Outstanding Claims	Integrated Payments Report
	Bulk Insurance Payments	Aged Receivables Report
		Provider A/R Totals

2. Select the **Patient** category.
3. Click **Patients not Recently Seen**.

Power Reporting

Search

- All Reports
- My Reports
- Organization Reports
- Auditing
- Clinical
- Financial
- Insurance
- Patient**
- Schedule/Recare

 Active Patient Count - HSPA	 Active Patient Count - HSPA by postal code	 New Patients by Month - Chart
 Patient Insurance	 Patient List	 Patient List - Birthday List Test
 Patients & Production by Referral Type - Chart	 Patients not Recently Seen	 Patients Seen
 Production by Referral Source	 Production by Referral Source - last 3 months + Procedure Category	 Production by Referral Source - with subcategory
 Analysis Patient Insurance Report Builder	 Analysis Patient Report Builder	 Interactive Patient Report Builder

4. Select a location.
5. Use the **date picker** to set a **No Visit Since** date.
6. Click the **export icon** to export it as a CSV (Excel file) or a PDF document.



Note: This report can be used as a reference to start contacting those patients who do not have an appointment scheduled.

Power Reporting > Patients not Recently Seen ★

Toggle Edit

Location: Alpine Dental LLC No Visit Since: 01/01/2022

View Report Auto-Submit

September 29, 2022 @ 04:49

Patients not seen since January 01, 2022

Zuniga, Jarrod A ▾
787 Edgehill, Providence, UT, 84332-9999 ↕

Patients in Household	Preferred Name	Phone	Email	Last Visit
Zuniga, Torrance C	Lyle	(800) 336-8749	do_not_reply@ident.com	12/29/2019

Zimmerman, Leland R ▾
79 Post FRY, Delta, UT, 84624-9999 ↕

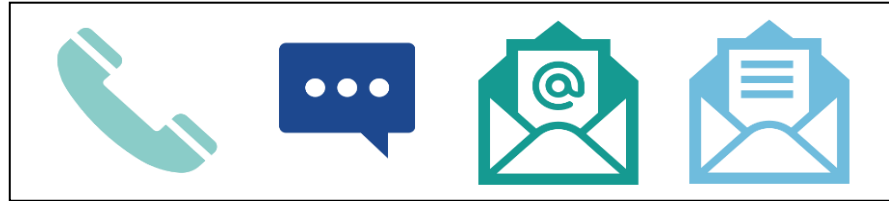
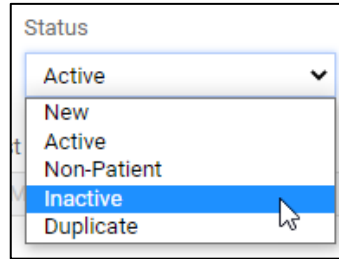
Patients in Household	Preferred Name	Phone	Email	Last Visit
Zimmerman, Agustin I		(800) 336-8749	do_not_reply@ident.com	06/08/2014
Zimmerman, Leland R		(800) 336-8749	do_not_reply@ident.com	07/04/2014

Zhang, Dana ▾

Deciding How to Handle Inactive Patients

Use the **Patients Not Recently Seen** report as a reference to:

- Change the patient statuses to Inactive.
- Contact these patients and try to get them scheduled for a recare appointment.

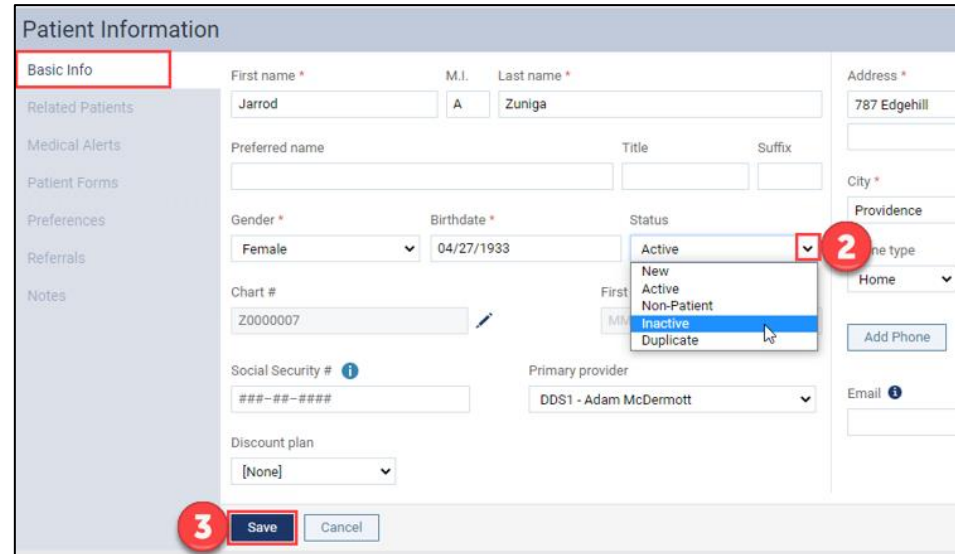


You can also use Dentrix Ascend Patient Engage to send a bulk email to patients.

DENTRIXASCEND
Patient Engage

Changing a Patient's Status to Inactive

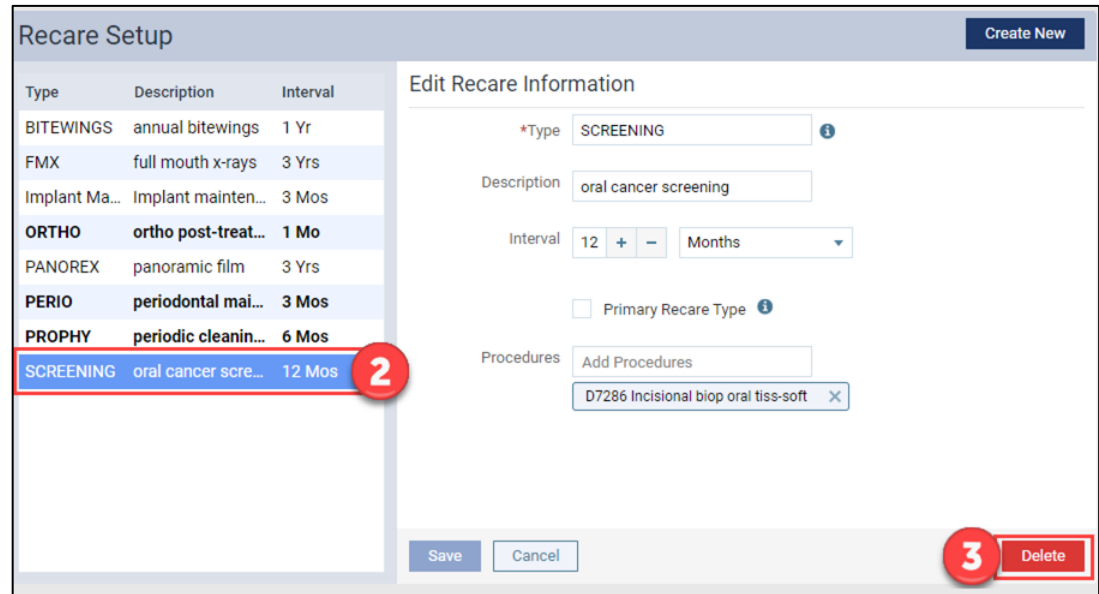
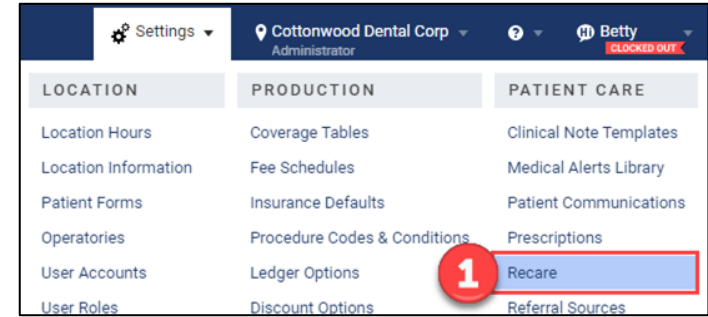
1. From the **Patient** menu, select **Patient Information**.
2. On the Basic Info tab, click the **Status** dropdown and select **Inactive**.
3. Click **Save**.

A screenshot of the 'Patient Information' form. The 'Basic Info' tab is selected and highlighted with a red box. The 'Status' dropdown menu is open, showing options: 'Active', 'New', 'Active', 'Non-Patient', 'Inactive', and 'Duplicate'. The 'Inactive' option is highlighted with a blue bar and a red circle with the number '2'. At the bottom of the form, the 'Save' button is highlighted with a red circle and the number '3'. The form contains fields for First name (Jarrod), M.I. (A), Last name (Zuniga), Address (787 Edgehill), City (Providence), Birthdate (04/27/1933), Gender (Female), Chart # (Z0000007), Social Security # (###-##-####), Discount plan ([None]), and Primary provider (DDS1 - Adam McDermott).

Cleaning Up Your Recare Setup

Reduce unnecessary choices when assigning recare to a new patient.

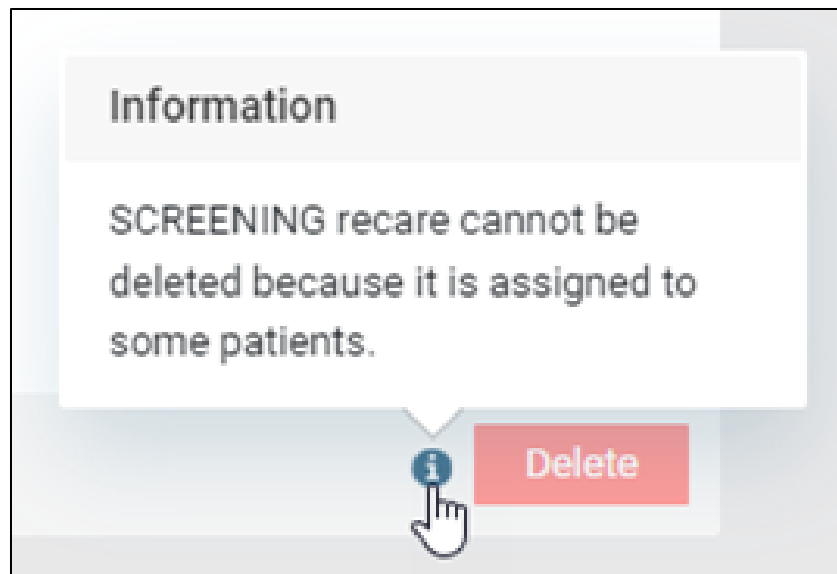
1. Open the **Settings** menu and select **Recare**.
2. Select the **Type** in the Recare Setup you want to remove.
3. Select **Delete**.

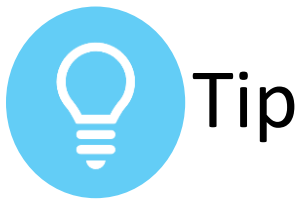


If the Delete Button is Inactive:

Click the **information badge** to find out why the Delete button is inactive.

- Before you can delete the recare type, you must:
 - Generate a report to find the patients have been assigned that recare type.
 - Go into each patient record and change their recare type.





Finding Patients with a Recare Type

The Recare Management report finds patients who have been assigned a specific recare type.

Read [Cleaning Up Your Recare Types](#) to learn how to find patients with a recare type you want to delete.

Recare Management

Filters

Locations

- All
- Cottonwood Dental Corp

All locations are selected

Patients

- With Recare
- No Recare

Appointment

- All
- Scheduled
- Unscheduled

Due Date Range

Recare Type

- All
- BITEWINGS
- FMX
- Implant Main
- ORTHO
- PANOREX
- PERIO
- PROPHY
- SCREENING

Available Records

Only show active patients

Recare Ty...	Due Date	Appointment	Patient Name	Contact	Last Visit	Last Contacted
SCREENING	04/09/2023	Unscheduled	Acevedo, Brandy	Acevedo, Brandy (389) 555-7878	11/10/2021	
SCREENING	04/12/2023	04/13/2023	Huang, Jimmie	Huang, Tom (208) 753-1234	09/01/2020	

Recare Setup

Type	Description	Interval
BITEWINGS	annual bitewings	1 Yr
FMX	full mouth x-rays	3 Yrs
Implant Ma...	Implant mainten...	3 Mos
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...	12 Mos

SCREENING

Edit Recare Information

*Type: SCREENING ⓘ

Description: oral cancer screening

Interval: 12 + - Months ▾

Primary Recare Type ⓘ

Procedures: Add Procedures

D7286 Incisional biop oral tiss-soft ✕

Showing 1 to 2 of 2 entries

← Previous 1 Next →

Insurance: End-of-Year Questions

Question: What do I need to do to update insurance for the new year?

Answer: In Dentrix Ascend, benefits reset on the first day of the benefit renewal month automatically.

- You must update coverage tables and fee schedules if a plan changes.

To learn more, read [Do Insurance Benefits Renew Automatically?](#)

The screenshot shows the 'Insurance Carriers' form in Dentrix Ascend. The form is titled 'Edit Plan: CIGNA/ EQUICOR - Georgia-Pacific'. It contains several input fields and dropdown menus. The 'Benefit renewal month' dropdown is highlighted with a red box and is set to 'January'. Other fields include 'Plan/Employer name' (Georgia-Pacific), 'Group #' (123456789), 'Claim mailing address' (P.O. Box 12345), 'City' (Atlanta), 'State' (GA), 'ZIP Code' (55555-5555), 'Phone number' ((555) 555-5555), 'Ext', 'Fax number' ((xxx) xxx-xxxx), 'Contact', and 'Email' (user@mydomain.com). The 'Source of payment' dropdown is set to 'Commercial Insurance', and the 'Type' dropdown is set to 'Dental'. The 'Max allowable amount fee schedule' dropdown is set to 'ADP - Location-1'. There are buttons for 'Coverage Table', 'Benefits', and 'Coordination of Benefits'.

Question: How can I see how my practice is doing with my insurance carriers?

Answer: Use the Insurance Utilization Report to see:

- production
- write-offs
- collections

To learn more, read [Evaluating Your Insurance Carriers.](#)

Power Reporting > Insurance Utilization ★ ← Back

Layout

Rows: Claim Carrier (Drop Level Here)

Columns: (Drop Level Here)

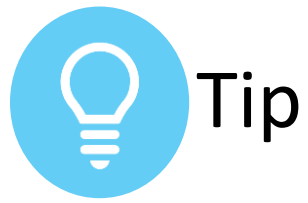
Measures: Patient Count, Procedure Charges, Total Write-off, Net Production, % Write-off, Average Write-off, Collection (Drop Measure Here)

Properties: Report Options...

3 Filters:

- Month includes previous 12 Month
- Claim Carrier excludes Not Available: spaces etc.
- Location excludes Not Available: spaces etc.

Claim Carrier	Patient Count	Procedure Charges	Total Write-off	Net Production	% Write-off	Average Write-off	Collection
A test	1	\$1,407.50	\$0.00	\$1,407.50	0.0%	\$0.00	-
Aaaa Carrier	4	\$2,107.00	-\$1,998.00	\$109.00	-94.8%	\$499.50	-
Aetna	11	\$21,862.70	-\$3,336.00	\$18,526.70	-15.3%	\$303.27	-\$126.20
Alaska Blue Cross	4	\$1,419.00	-\$100.00	\$1,319.00	-7.0%	\$25.00	-
Anthem Blue Cross CA	1	\$100.00	\$0.00	\$100.00	0.0%	\$0.00	-\$100.00
BOB Insurance	1	\$205,904.00	\$0.00	\$205,904.00	0.0%	\$0.00	-\$44.00
Blue Cross of Washington and Ala...	6	\$3,002,187.30	-\$4,999,746.00	\$2,461.30	-100.0%	\$833,291.00	-\$644.00
Blue Shield of California	2	\$350.00	-\$243.56	\$106.44	-69.6%	\$121.78	-
Cigna Dental Health (DHMO)	2	-	-\$340.00	-\$340.00	-	\$170.00	-
Cigna Dental Health PPO	4	\$5,280.00	\$1,612.50	\$7,392.50	27.9%	-\$403.13	-\$1,900.50
Cigna PPO	1	\$375.00	\$0.00	\$375.00	0.0%	\$0.00	-
DNU-Tricare Military (United Conc...	1	\$4,088.30	\$10.00	\$4,098.30	0.2%	-\$10.00	-\$375.16
Dearborn National	1	\$105.00	\$0.00	\$105.00	0.0%	\$0.00	-
Delta Dental Of Washington (WDS)	7	\$32,748.00	-\$8,267.00	\$24,481.00	-25.2%	\$1,181.00	-\$8,816.50
Delta Dental of California	23	\$1,145,348.50	-\$2,464.10	\$1,142,884.40	-0.2%	\$107.13	-\$6,401.20
Dental Select	3	\$1,171.00	\$0.00	\$1,171.00	0.0%	\$0.00	-
Fairbanks North Star Borough (Gr...	1	\$1,000.00	\$0.00	\$1,000.00	0.0%	\$0.00	-
Justice	2	\$350.00	\$29.00	\$329.00	8.3%	-\$14.50	-\$29.00
Local 118 (Rochester NY)	5	\$2,848.00	\$6.25	\$2,854.25	0.2%	-\$1.25	-\$100.00
Medicaid of New York	1	\$1,314.50	-\$7.00	\$1,307.50	-0.5%	\$7.00	-\$10.00
Medicaid of Utah	1	\$350.00	-\$270.00	\$80.00	-77.1%	\$270.00	-\$80.00
MetLife	85	\$161,881.50	-\$27,807.47	\$134,074.03	-17.2%	\$327.15	-\$24,421.89
Northern California Pipe Trades Tr...	4	\$1,651.00	-\$150.00	\$1,501.00	-9.1%	\$37.50	-\$575.00
Regence Blue Cross of Utah	1	\$3,600.00	-\$1,550.00	\$2,050.00	-43.1%	\$1,550.00	-\$1,650.00
Wally World Benefits Administrato...	1	\$1,000.00	\$0.00	\$1,000.00	0.0%	\$0.00	-
Grand Total	220	\$8,776,508.80	-\$5,053,283.98	\$3,723,224.82	-474.7%	\$839,435.25	-\$50,375.95



Setting Up KPI's for the New Year

Watch [5 Must-Have Reports to SEE Your Success](#) to help you:

- Reflect on what went well over the last year.
- Identify what you can improve on for the new year.
- Set goals for the new year.





RECAP

Completing Other End-of-Year Tasks

Setting up your calendar for the new year	<ul style="list-style-type: none">• Create events in the Calendar.
Handling HSA/FSA requests	<ul style="list-style-type: none">• Generate a billing statement from the patient's account.
Cleaning up your database	<ul style="list-style-type: none">• Generate the Patients not Recently Seen in Power Reports to identify inactive patients.• Review Recare Setup & remove non-recare types.



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

Where to Get Help

Videos

- [Scheduling an Event](#)

Articles

- [Scheduling events](#)
- [Generating a Patient Statement of Account](#)
- [Cleaning Up Your Recare Types](#)
- [Patients not Recently Seen Report](#)
- [Locating Patients without an Appointment](#)
- [Inactivating patient records](#)
- [Insurance Utilization Report](#)
- [Evaluating Your Insurance Carriers](#)



RECAP: End-of-Year Best Practices



Finding patients with overdue recare

- Use the Recare Management Report.
- Set up custom communication in Patient Communications.



Finding patients with outstanding treatment

- Use the Interactive Treatment Plan Report Builder.
- Contact patients: call, send letters (by mail or email), or send text messages.



Updating fee schedules

- Choose one of the three options to update fee schedules.



Completing other end-of-year tasks

- Set up your calendar for the new year.
- Handle HSA/FSA requests.
- Clean up your database.