Practice Success

End-of-Year Best Practices

HENRY SCHEIN ONE | DENTRIX ASCEND

Presenter Information

Katie Nielsen

- Certified Dentrix trainer for 20 years. Dentrix Ascend trainer for 8 years.

- Awarded Dentrix Ascend Trainer of the Year (2016) and Dentrix Ascend Spirit award (2018).

- An expert in helping offices create a predictable and profitable workflow for end-of-year tasks in Dentrix Ascend.

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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.

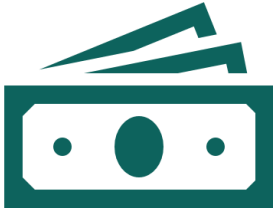- **Contacting** patients that are overdue for recare.

| 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

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

Available Records

Only show active patients **On** | Print

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	

Filters

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

Patients
- With Recare
- No Recare

Appointment
- All
- Scheduled

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Using the Recare Management Report

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

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**.

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

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

[Select Locations]

Patients
- ● With Recare
- ○ No Recare

Appointment
- ○ All
- ○ Scheduled
- ● Unscheduled

Due Date Range

[   ]
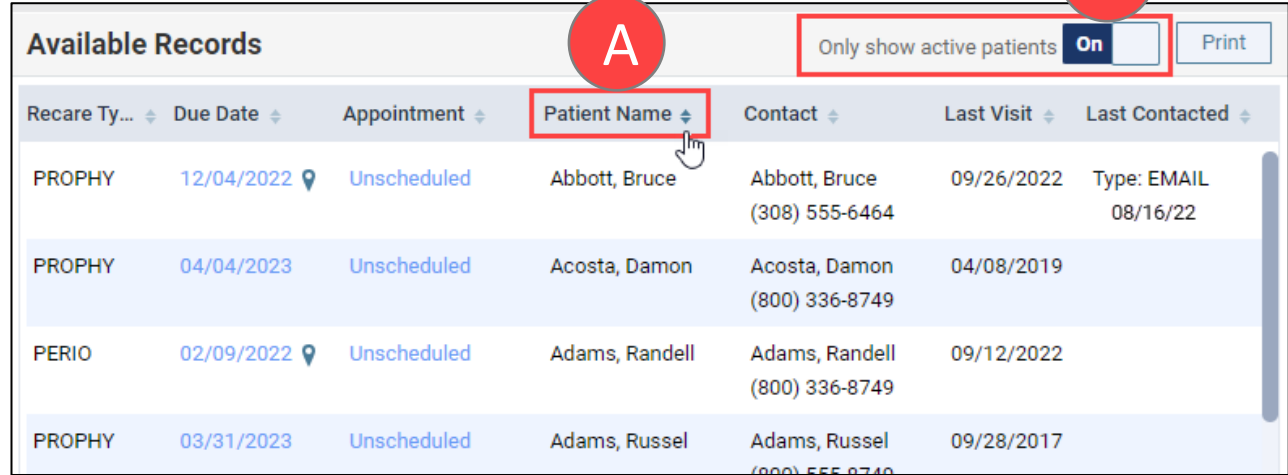
Recare Type
- ☑ All
- ☐ BITEWINGS
- ☐ FMX
- ☐ Implant Main
- ☐ ORTHO
- ☐ PANOREX
- ☑ PERIO
- ☑ PROPHY
- ☐ SCREENING

[Search] [Reset]

Available Records

Only show active patients **On**   [Print]

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.

Note: Patient communications are location-specific.

Tip
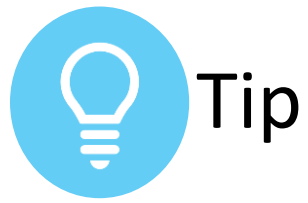
Learn More about Communicating with Patients in Dentrix Ascend

Watch this webinar:
[3 Keys to Effectively Communicate with Your Patients Using Dentrix Ascend (June 2022)](#)

RECAP: **Finding Patients with Overdue Recare**

Report to Use: Recare Management Report	• Print the report to use as a reference.
Contacting Patients: Emails/text messages	• 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
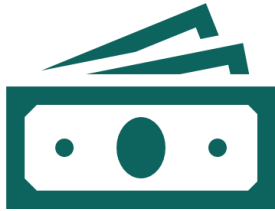
Helps your practice increase production.

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

Tip

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](#).
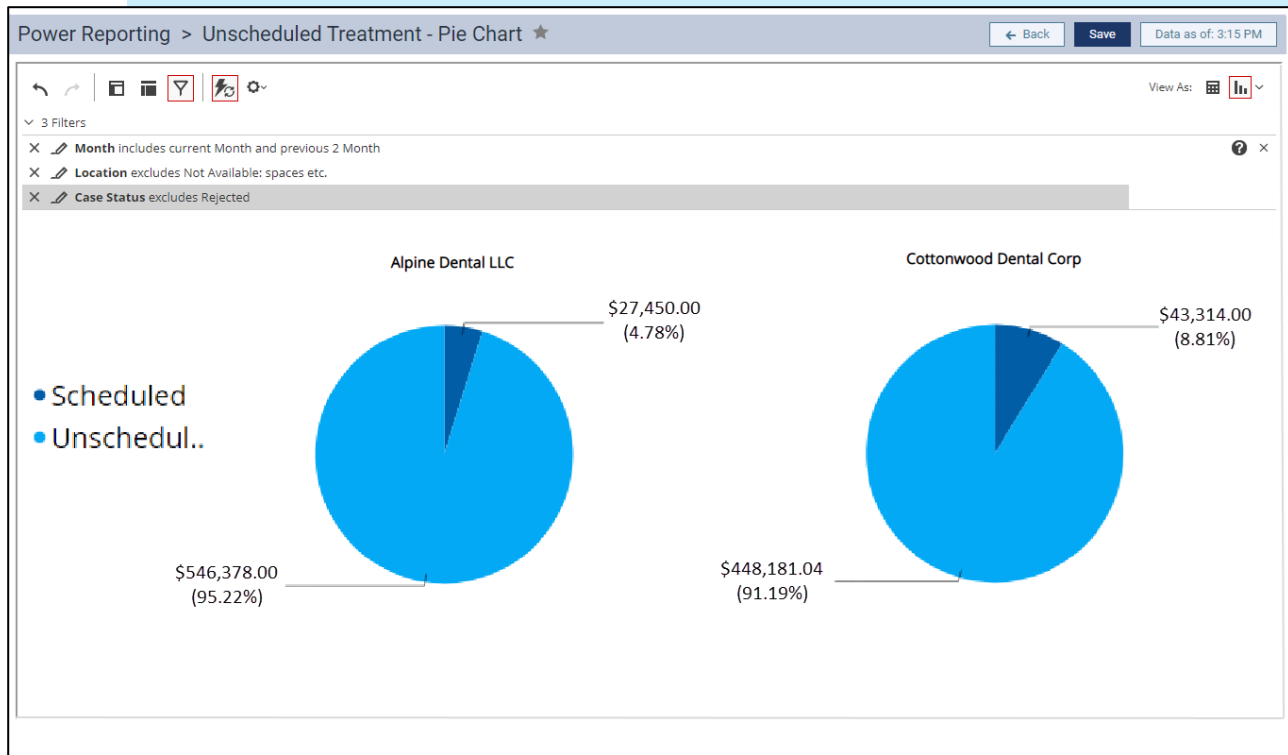
Unscheduled Treatment Report

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

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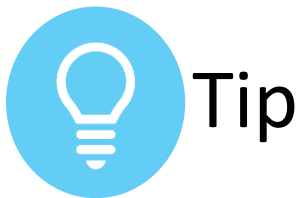
Tip

Learning More about Power Reporting

Visit the Power Reporting Course at the Dentrix Ascend Academy.

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.

DENTRIX ASCEND®
Patient Engage

Cheryl Munsey

Senior Account Executive, Henry Schein One

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

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RECAP: **Finding Patients with Outstanding Treatment and Remaining Benefits**

Report to Use: Interactive Treatment Plan Report Builder	• Add fields to the report builder. • Apply filters to make information more useful for end of year.
Contacting Patients: Various	• 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
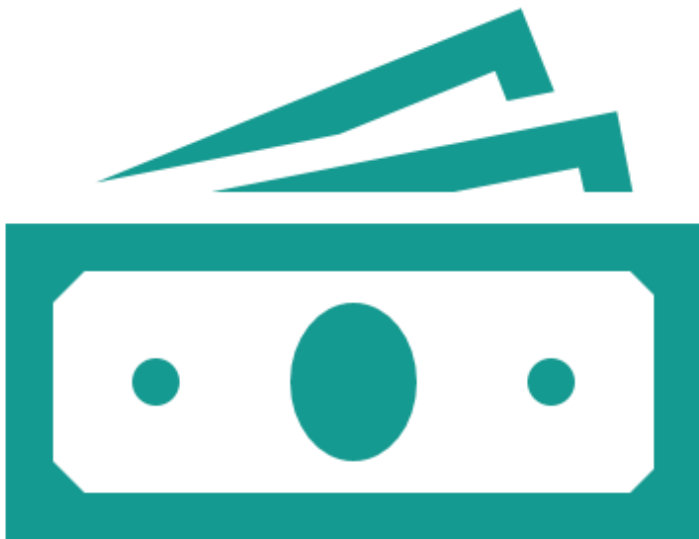
Updating Fee Schedules

- Reasons you should consider updating fees.

- Ways you can update fee schedules in Dentrix Ascend.

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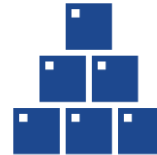
Note: Consultants recommend reviewing your fee schedules annually to ensure you're charging a competitive amount.

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.**
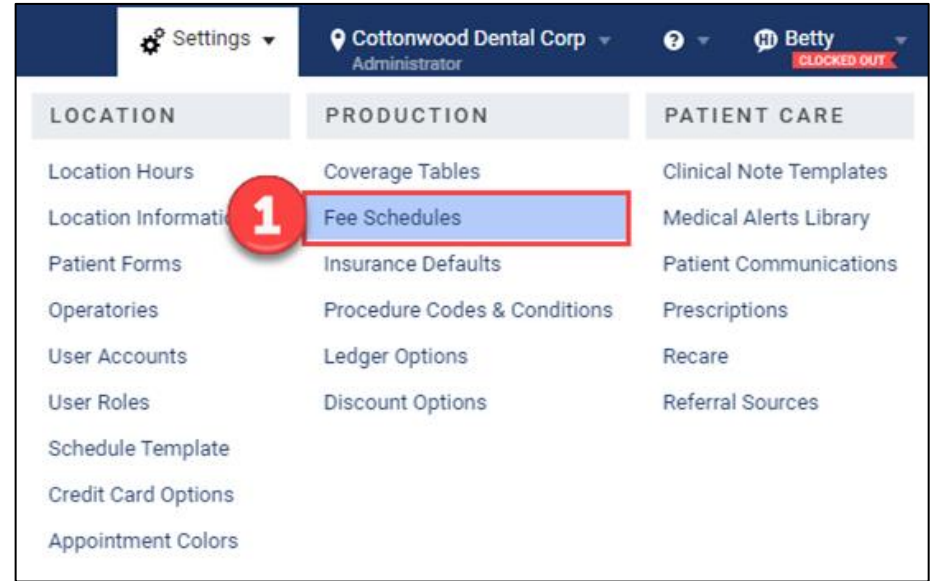
2. Select the name of the fee schedule you want to edit.

3. Click **Set End Date**.

4. Select the date when the current fees in this schedule will expire.

5. Click **Set & Save**.

6. Select **Fee schedule version**.

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

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.

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**.

[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.**

Tip

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.**

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).

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.

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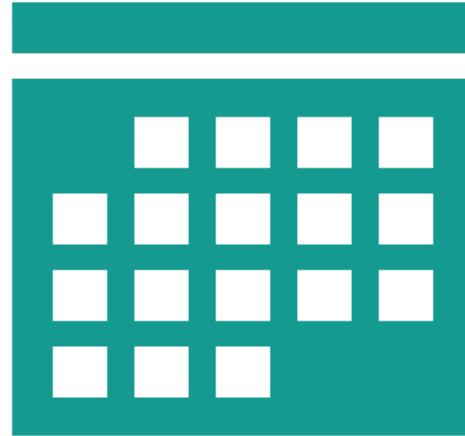
Note: This will avoid having to move appointments booked far in the future like hygiene.

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**.

Scheduling an All-Day Event Video
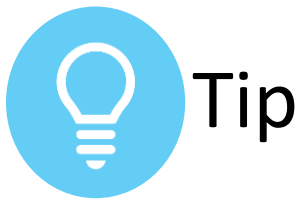
Tip

Select All Operatories

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

1. Click the operatory dropdown.
2. Check All operatories.
3. Click **Apply Selected**.

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.

To generate a patient statement of account:

1. Search for and select the patient.

2. From the **Patient** menu, under **Financial**, select **Billing Statement**.

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.

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

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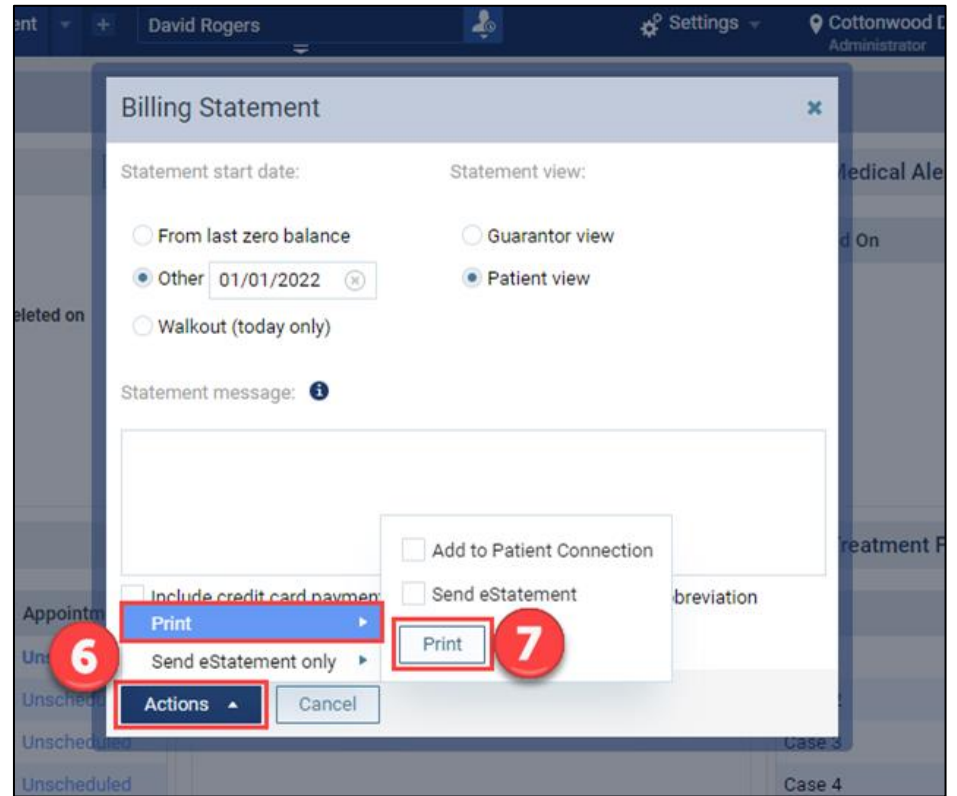
When you click Print, the Statement of Account opens in a new browser tab.

9. Click **Print**.

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.

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**.

2. Select the **Patient** category.

3. Click **Patients not Recently Seen**.

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.

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.
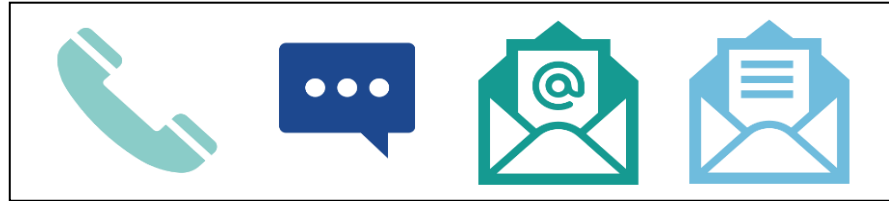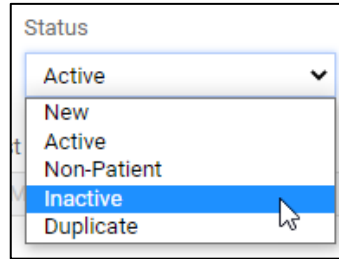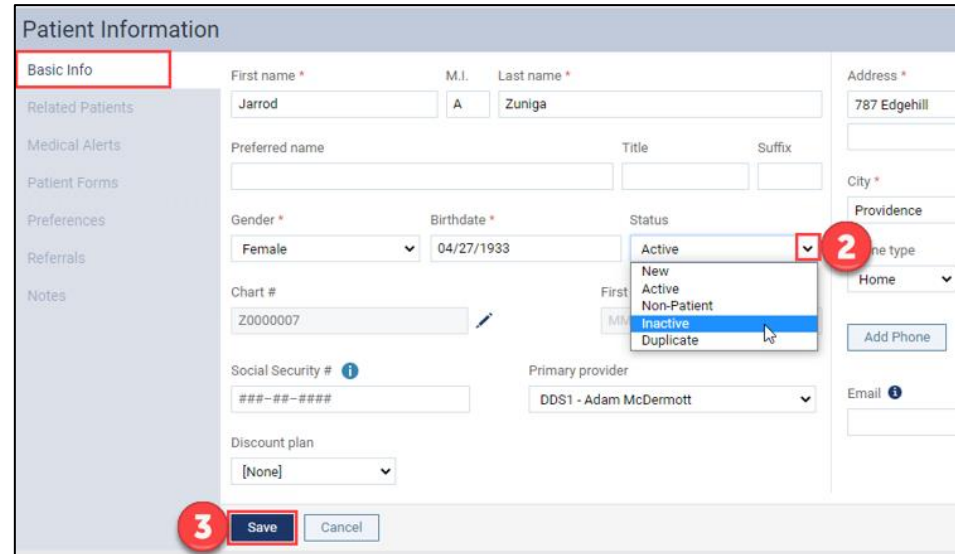

You can also use Dentrix Ascend Patient Engage to send a bulk email to patients.

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**.

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**.
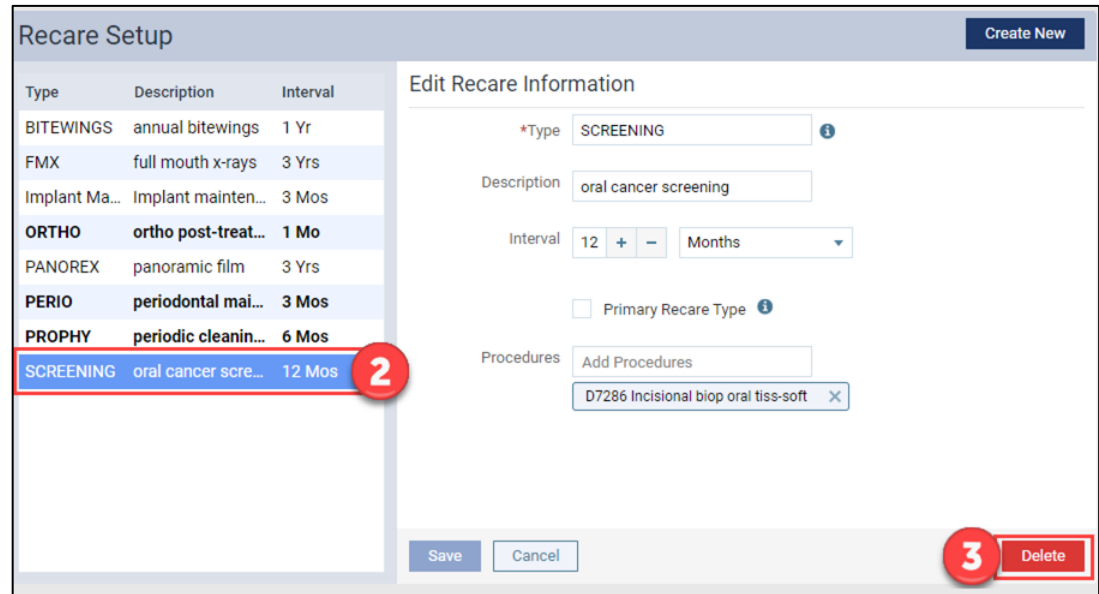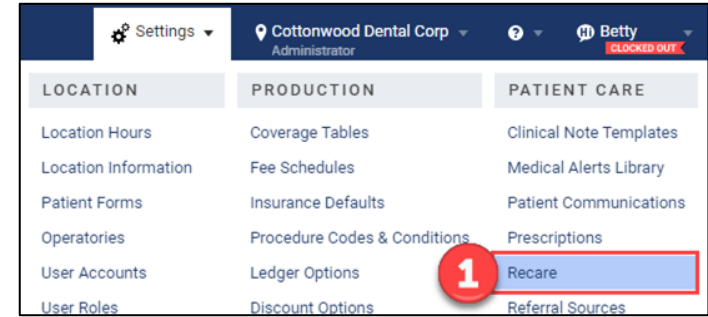
If the Delete Button is Inactive:

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.

Information

SCREENING recare cannot be deleted because it is assigned to some patients.

Delete

Tip
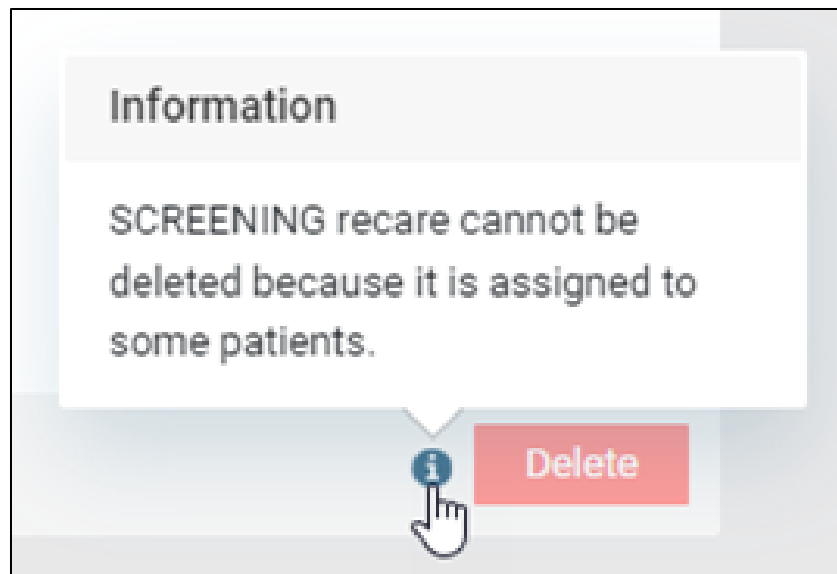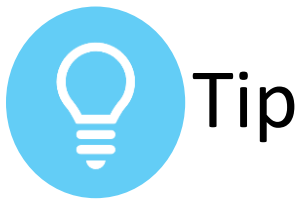
Finding Patients with a Recare Type

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.

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?

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.

Tip

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	• Create events in the Calendar.
Handling HSA/FSA requests	• Generate a billing statement from the patient's account.
Cleaning up your database	• 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-tasks
- Set up your calendar for the new year.
- Handle HSA/FSA requests.
- Clean up your database.