

Improve Cash Flow with Dentrix Ascend Revenue Cycle Management Solutions



Overview

5 features of Dentrix Ascend RCM Solutions to improve cash flow





Feature 1: Automated Eligibility

What Is It?

- Every night, Ascend verifies eligibility for patients scheduled for the **next 4 days**
- Verification results show in the patient's document manager
- Response details depend on the payer



Tip: Maximize the automation by setting up a protocol to review within the 4-day window.



Automated Eligibility: Benefits



One place to find all eligibility information



Eliminates hours of work



Launch real-time checks

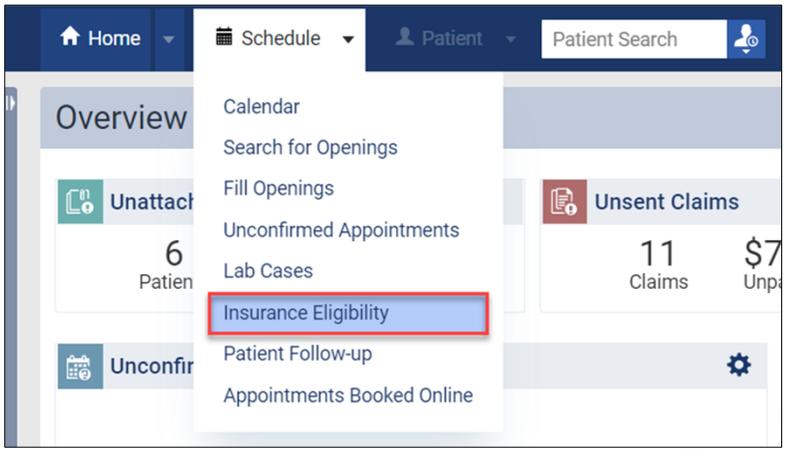


Know eligibility status of patients prior to appointments



Where to Find It

- Schedule > Insurance Eligibility



Insurance Eligibility Today June 2021 1 w 1 m 6 m Pinboard View

Thursday 17

Unable to Verify Ineligible Eligible

| Appointment | Patient Information | Subscriber Information | Insurance Plan | Verification Type |
|------------------------------------|--|---|---|------------------------------------|
| 06/17/2021 | | | | |
| Aetna Carrier phone (800) 856-5600 | | | | |
| 3:00 PM 30 min Jimmy | Jane (Janey) Jones 01/01/1901 (120) | James Jones 04/15/1993 (28) ID 4545458854885 | Plow King Phone (800) 741-4781 | Manual (06/10/2021) Auto verify |
| Blue Cross Blue Shield of Texas | | | Does not accept Automated Eligibilities | |
| 12:00 PM 70 min DANW | Isaac Chiltepin 02/24/1993 (28) | Isaac Chiltepin 02/24/1993 (28) ID 1818181819 | Ace Tomato Co. Phone (800) 451-0287 | Manual (06/10/2021) |

 **Tip:** Focus your team’s energy on “Unable to Verify”



 **Tip:** If you clicked **Auto verify**, a paperclip icon will appear when there is a response.

If the patient is still in the Unable to Verify list, click the paperclip to open the response.

Unable to Verify Ineligible Eligible

| Appointment | Patient Information | Subscriber Information | Insurance Plan | Verification Type |
|------------------------------------|--|--|-----------------------------------|---------------------------------------|
| 08/19/2021 | | | | |
| Aetna Carrier phone (800) 856-5600 | | | | |
| 3:00 PM 30 min Jimmy | Jane (Janey) Jones 01/01/1901 (120) | James Jones 04/15/1993 (28) ID 4545458854885 | Plow King Phone (800) 741-4781 | Automatic (08/19/2021) Auto verify |



In the Eligibility Response, check for errors in the patient's name, birth date, subscriber ID, etc.

Do this before the patient arrives for their appointment.

The screenshot shows a web browser window titled "Eligibility Response" with the URL "ascend-sales.ident.com/document/7000000044150/document". The page is divided into sections for Payer, Provider, Subscriber, and Dependent. At the bottom, a red-bordered box highlights an error message: "An Error Occurred". Below this, a table lists the error details:

| HIPAA ID | Error Reason | Follow Up Action |
|----------|---|------------------------------|
| 43 | Invalid or Missing Provider Identification. | Please Correct and Resubmit. |



Where to Get Help

- [Automated Insurance Eligibility](#)
- [Customizing the insurance eligibility list view](#)
- [Eligibility FAQ](#)





What Is It?

- Dentrix Ascend alerts you when supporting documentation is recommended for the procedures in a claim.



DENTRIXASCEND
INSIGHTS DIGITAL SERIES

Claim Attachment Reminders: Benefits



Reduce delays or non-payments from insurance carriers known to accept electronic attachments



Easily capture and submit accurate claims documentation the first time



Don't rely on your memory or others to remember attachment requirements

DENTRIXASCEND
INSIGHTS DIGITAL SERIES

HENRY SCHERER **ONE**



Where to Find It

Automated recommendations show when you:

- Click **Pre-authorizations** in the Tx Planner.
- Click **Patient Walkout** or click a claim in the Ledger.
- Click a claim in the Unsent Claims report.
- Click a claim in **Unsent Claims (Overview page)**.

Unassigned

| Date | Code | Th |
|------------|-------|----|
| 09/07/2021 | 02393 | 3 |
| 09/08/2021 | 06750 | 17 |
| 09/08/2021 | 06040 | 18 |
| 09/08/2021 | 06750 | 19 |

Pre-authorizations: 0

Ledger

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment Primary Guarantor: Isaac Chiltepin Patient Walkout

| Transaction Date | Modified Date | Patient | Code | Description | Provider | Amount | Running Balance |
|------------------|---------------|-----------------|-------|-----------------------------|----------|--------|-----------------|
| 03/16/2021 | 03/30/2021 | Isaac Chiltepin | D1110 | Prophylaxis - Adult | Jacob | 95.00 | 285.00 |
| 03/16/2021 | 03/30/2021 | Isaac Chiltepin | D1206 | Typical Applic Fluoride | Jacob | 43.00 | 285.00 |
| 03/30/2021 | 03/30/2021 | Isaac Chiltepin | Pay | Credit Card Payment \$85.00 | | -85.00 | 205.00 |

Unsent Claims

Send Selected Claims

| Patient | Service Date | Created On | Claim Type | Subscriber | Carrier | Amount | Att. |
|-------------|--------------|------------|------------|-------------|---------------------------------------|----------|------|
| Amy Jones | 08/20/2021 | 08/24/2021 | Primary | Amy Jones | Guardian Life Insurance Co. of Ame... | \$200.00 | ⚠ |
| Aaron Llyod | 04/21/2021 | 08/24/2021 | Primary | Aaron Llyod | Aetna DMO | \$10.00 | ⚠ |
| Ben Lee | 05/29/2021 | 08/24/2021 | Primary | Ben Lee | Northern California Pipe Trades Trust | \$350.00 | |
| Karen Brown | 04/30/2021 | 08/24/2021 | Primary | Karen Brown | Northern California Pipe Trades Trust | \$20.00 | |

Overview

Unattached Procedures: 20 Patients, \$10,575.00 Unpaid Procedures

Unsent Claims: 10 Claims, \$5,699.00 Unpaid



Examples

Claim Detail - Isaac Chiltepin (Secondary) \$1,200.00

Procedures General Claim Info Attachments Status/Notes

Add Image Add from Document Manager Add Perio Exam Remove Selected

Warning. We recommend attaching the EOB(s) from the prior claims before submitting this claim.

| All | Document Name | Classification / Type | Date Attached | NEA # |
|-----|---------------|-----------------------|---------------|-------|
|-----|---------------|-----------------------|---------------|-------|

Unsent Claims

Patient List

| | | |
|---------------------------|------------|-----------|
| David Rogers Primary | 02/19/2021 | \$68.00 |
| Isaac Chiltepin Secondary | 02/15/2021 | \$1200.00 |
| Isaac Chiltepin Primary | 03/23/2021 | \$1196.00 |

Isaac Chiltepin \$1,200.00

Warning. The insurance carrier requires attachment(s) for some procedure(s). Show details

| Carrier | Plan/Employer | Rendering | Billing | Service date | Created on |
|---------|---------------|----------------|----------------|--------------|------------|
| MetLife | Acme | Adam McDermott | Adam McDermott | 02/15/2021 | 02/15/2021 |

| Th | Surfaces | Code | Description | Provider | Amount |
|----|----------|-------|--------------------------------|----------|----------|
| 9 | | D3310 | Root Canal Therapy on Anterior | DDS1 | 1,200.00 |





How To Do It

- An orange warning icon appears when claim attachments are recommended.
- Dentrix Ascend maintains a database of carrier information.
- Recommendations for attachment types are carrier-specific.

Claim Detail - Isaac Chiltepin (Primary) \$2,000.00

Procedures General Claim Info **Attachments** Status/Notes

Add Image Add from Document Manager Add Perio Exam Remove Selected

Warning. The insurance carrier requires attachment(s) for some procedure(s). [Hide details](#)

| | |
|---|-------|
| D2740 - Full Porcelain/Ceramic Crown Th: 5 | X-RAY |
| D2740 - Full Porcelain/Ceramic Crown Th: 10 | X-RAY |



When To Use It

- Review before sending claims
- Unlimited claims included at no additional charge

Claim Detail - Isaac Chiltepin (Primary) \$2,000.00

Procedures General Claim Info Attachments Status/Notes

Add Image Add from Document Manager Add Perio Exam Remove Selected

| <input type="checkbox"/> All | Document Name | Classification / Type | Date Attached | NEA # |
|------------------------------|--|-----------------------|---------------|-------|
| <input type="checkbox"/> | 07/07/2021 - Bitewing Single Ima... (1) | X-RAY | 07/07/2021 | |
| <input type="checkbox"/> | 07/07/2021 - Intraoral Occlusal I... (1) | X-RAY | 07/07/2021 | |





Tip: When a secondary insurance claim needs an attachment, Ascend reminds you to attach the EOB(s) from prior claims.

Where to Get Help

- [Adding Attachments to Claims](#)





Feature 3: Automated Collections Reminders

What Is It?

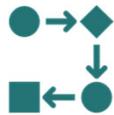
- A routing panel task reminder that supports RCM best practice



Over-the-Counter Collection Reminders: Benefits



Collect as much as you can at time of service to keep cash flow positive



Consistent workflow for the team to follow

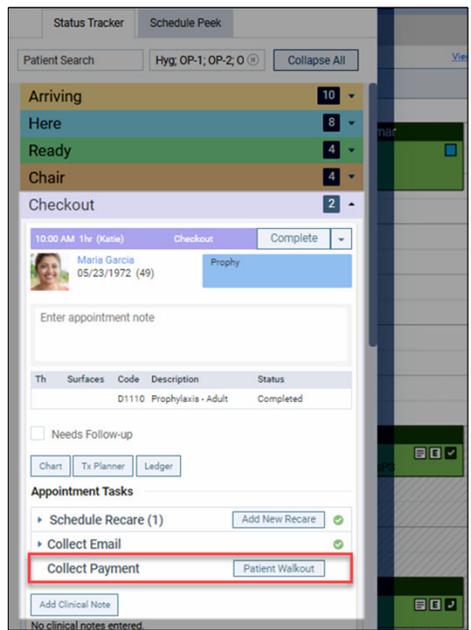


Reduce the amount you must collect later



Where to Find It

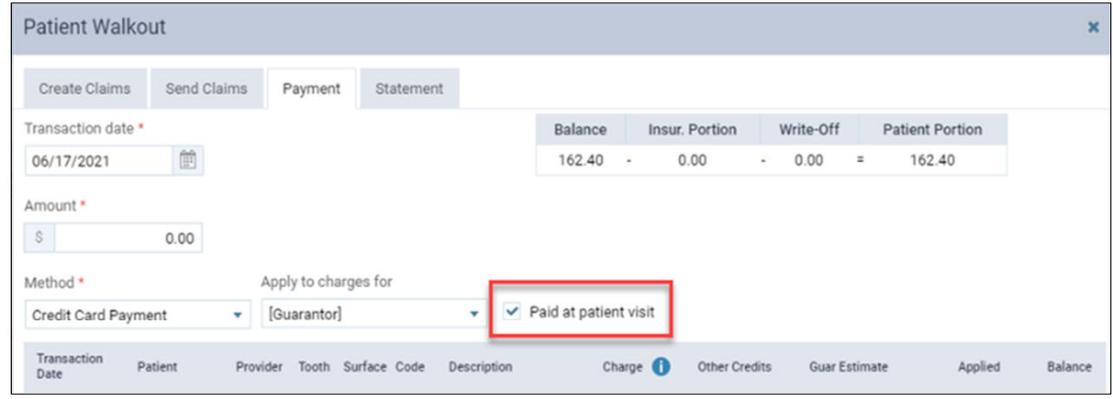
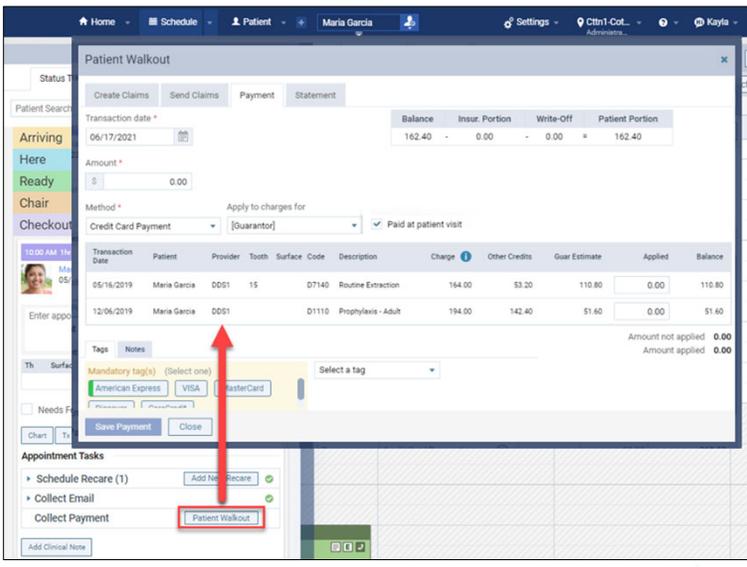
- Routing panel at appointment completion – Collect Payment task





How To Do It

- Click **Patient Walkout** to open the Patient Walkout window



Tip: If your practice collects at the time of service, check **Paid at patient visit** to see OTC percentage in the Payment Analysis report





When To Use It

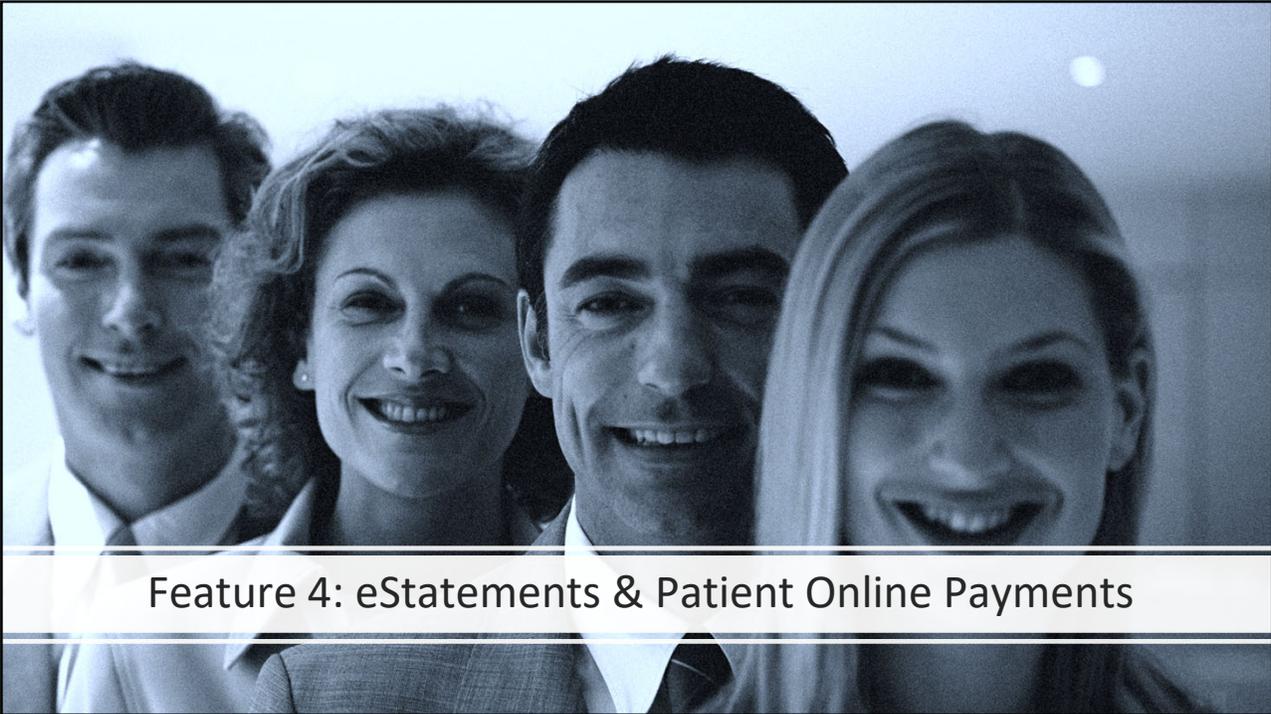
- Continuously – make it part of the office visit workflow
- Standardization in workflows when you are using the routing panel



Where to Get Help

- [Increasing Over-the-Counter Collections](#)
- [Collecting Payment at Patient Checkout](#)
- [Seeing Your Over-the-Counter Collection Numbers](#)





Feature 4: eStatements & Patient Online Payments

What Is It?

- Practices can send electronic statements via text or email
- Link from eStatement to pay online



Patient Online Payments: Benefits



Your patients will appreciate the convenience



Save cost of printing/mailing



You'll get paid faster



Patient Communications Practice Profile

Appointment Recare **eStatement**

eStatement Inactive
Sent after eStatements are generated

View eStatement Message

Sample Email Message

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

[View Statement](#)

Sample Text Message

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

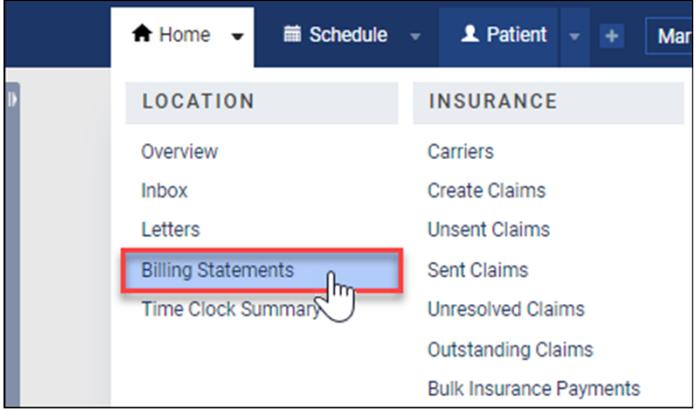


Tip: Customize the electronic statement message (Settings > Patient Communications). Choose the preferred contact method (email or text).



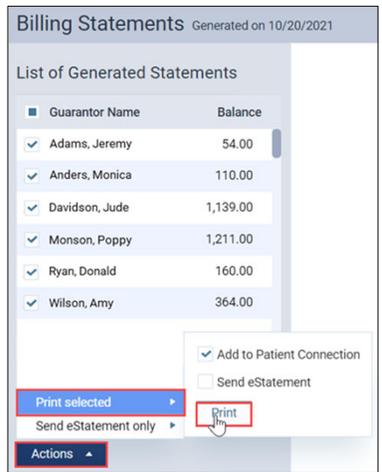
Where to Find It

- Patient on-demand (Billing Statement/Patient Walkout)
- **Home > Billing Statements**



How To Do It

- Generate an estatement using the **Actions** menu:
 - Choose which patients to send eStatements
 - Choose which patients to send printed statements
- WorldPay account required to accept Online Payments.





Tip: Use the **Billing Statements to Print** dialog box to print statements for patients who cannot receive an electronic statement.

Billing Statements to Print

Warning. Electronic statements could not be sent to 3 guarantors, due to the lack of a valid email address and/or mobile number. No records have been added to Patient Connection.

| <input checked="" type="checkbox"/> Guarantor Name | Balance |
|--|---------|
| <input checked="" type="checkbox"/> Cervantes, Nemesio | 693.00 |
| <input checked="" type="checkbox"/> Chart, Pat | 270.00 |
| <input checked="" type="checkbox"/> Chiltepin, Isaac | 368.00 |

Actions ▲ Cancel



Tip: Access the **Inbox** from the **Home** or the **User** dropdown menu to view online payment messages.

Home ▼ Schedule

LOCATION

- Overview
- Inbox**
- Letters

OR

11 Kayla ▼

- Inbox 11
- Messages 11
- Online Payments**
- Denti-Cal

These come in throughout the day as patients make payments.

Inbox

Messages 7 **Online Payments** Denti-Cal Reports

Search guar./card holder/ref # View

| Date & Time | Guarantor | Card # | Card Holder | Card Type | Transaction ID | Reference # | Status | Amount |
|------------------------|------------------|----------|---------------|-----------|----------------|----------------------|-----------|--------|
| 07/06/2021 — Yesterday | | | | | | | | |
| 07/06/2021 2:04 PM | Stanley Williams | ****1234 | Stanley Willi | Visa | 1844708240 | Stanley Williams | Applied | 70.00 |
| 07/02/2021 | | | | | | | | |
| 07/02/2021 2:32 PM | Isaac Chiltepin | ****2345 | Isaac Chilte | Visa | 1807559000 | Isaac Chilteoin 9... | Unapplied | 200.00 |
| 07/02/2021 9:16 AM | Maria Garcia | ****3456 | Maria Garci | Visa | 1803447337 | Maria Garcia 789... | Unapplied | 350.00 |





When To Use It

- Process overnight payments and unapplied credits in the Ledger at the start of each day.

View Payment (-)

Transaction date * 04/06/2021

Amount * \$ 50.00

Method * Credit Card Payment

| Transaction Date | Patient | Provider | Tooth | Surface | Code | Description | Charge | Other Credits | Guar Estimate | Applied | Balance |
|------------------|-----------------|----------|-------|---------|------|---------------------|--------|---------------|---------------|---------|---------|
| 04/10/2021 | Isaac Chiltepin | Jacob | | | Adj | Credit Card Payment | 50.00 | 0.00 | 0.00 | 50.00 | 0.00 |

Tags: MasterCard, VISA, Discovery



Home | Schedule | Patient | Patient Search

| 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 |

▼ Cottonwood Dental - Location Methods

| Payment Method | Quantity | Total |
|--------------------------------|----------|---------------|
| Insurance Payment - Check | 2 | 300.00 |
| Insurance Payment - Electronic | 4 | 1250.00 |
| Check Payment | 3 | 550.00 |
| Cash Payment | 1 | 60.00 |
| Credit Card Payment | 8 | 650.00 |
| Manually entered | 1 | 50.00 |
| In-office card reader | 3 | 250.00 |
| Online | 4 | 350.00 |
| Patient Financing Payment | 0 | 0.00 |



Online payments are broken out in the Payment Analysis report



Integrated Payments Report Print

Worldpay account: CC Processing ID: 1104891

| Date & Time | Card Holder | Card Type | Transaction ID | Source | Reference # | Transaction Type | Amount |
|-------------------------|------------------|-------------|----------------|--------|------------------------|------------------|----------|
| 07/01/2021 - 07/07/2021 | Search here | Select type | Search ID's | Select | Search | Select type | Search |
| 07/06/2021 2:06 PM | Maria Garcia | Visa | 1844727872 | Online | Maria Garcia 123 4... | Payment | \$350.00 |
| 07/06/2021 2:06 PM | Isaac Chiltepin | Visa | 1844708240 | Online | Isaac Chiltepin 123... | Payment | \$200.00 |
| 07/02/2021 2:34 PM | Stanley Williams | Visa | 1807591122 | Online | Stanley Williams 8... | Payment | \$70.00 |
| 07/02/2021 2:32 PM | Martha Jones | Visa | 1807559000 | Online | Martha Jones 890... | Payment | \$60.00 |



Tip: The Integrated Payments Report shows credit card payments (made in office or online) that have been posted, voided, or refunded using Dentrix Ascend Pay.

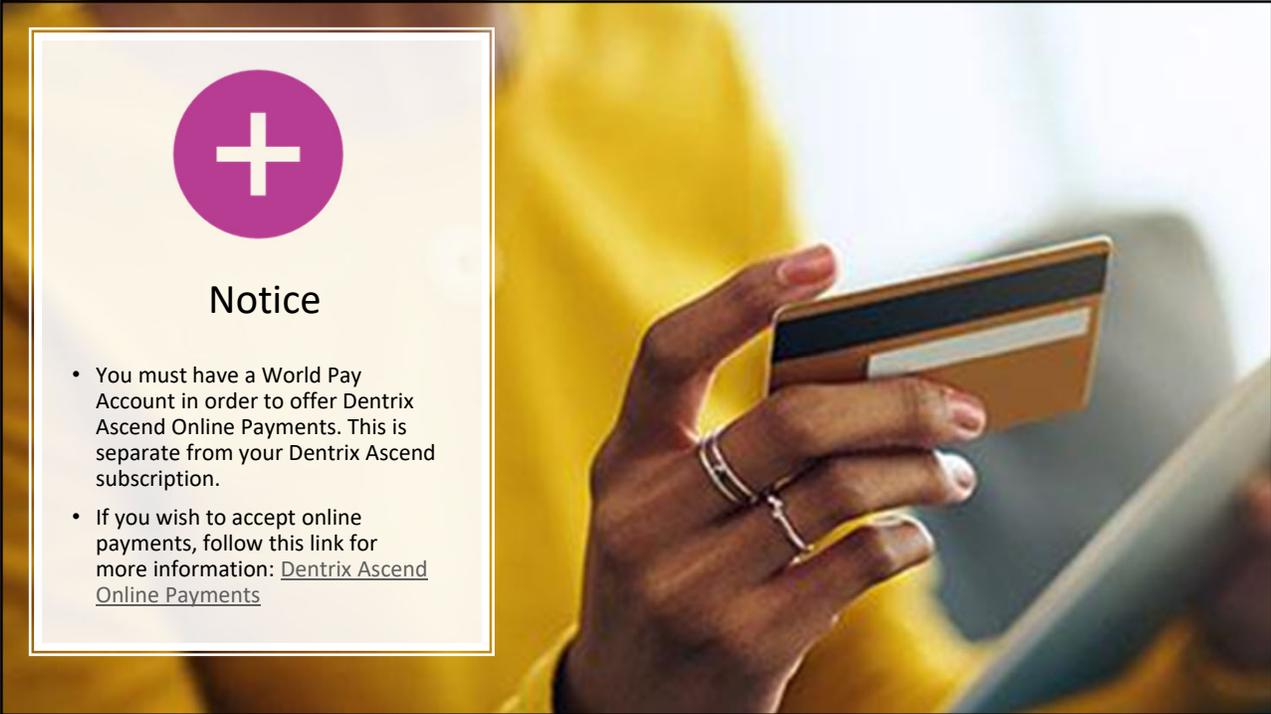
Use this report to reconcile credit card transactions in Ascend with transactions in WorldPay iQ reports.



Where to Get Help

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







Notice

- You must have a World Pay Account in order to offer Dentrix Ascend Online Payments. This is separate from your Dentrix Ascend subscription.
- If you wish to accept online payments, follow this link for more information: [Dentrix Ascend Online Payments](#)



What Is It?

- Native credit card payment functionality in the Ascend Ledger.
- Process patient payment at the time of service.
- No manual entry or credit card receipt reconciliation required.



Dentrix Ascend Pay: Benefits



Team efficiency



Void and Refund directly from the transaction



Error reduction



Receipts



 **Tip:** Depending on the device, you can offer contactless payment option. The [Dentrix Ascend Pay overview](#) details compatible devices.

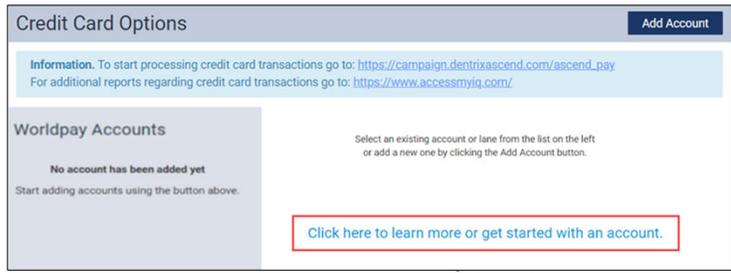
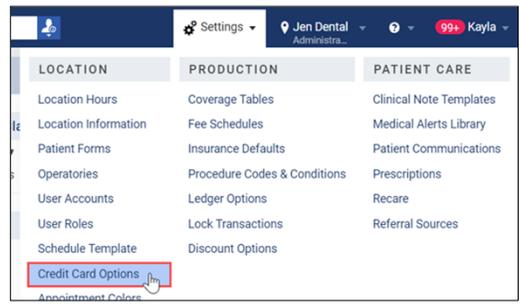


 **Tip:** Batching is done automatically; no need to run a batch or close out the day.



Ascend Pay Set-up

- From the **Settings** menu, select **Credit Card Options**.
- Click the hyperlink to get started with a World Pay account.





Where to Find It

- Ledger payment window

Enter Payment (-)

Transaction date * 07/21/2021

| Balance | Insur. Portion | Write-Off | Patient Portion |
|---------|----------------|-----------|-----------------|
| 204.00 | - 120.00 | - 0.00 | = 84.00 |

Amount * \$ 84.00

Use lane * iSMP4 [Click to Swipe Card](#)

Method * Credit Card Payment

Apply to charges for [Guarantor] Paid at patient visit

| Transaction Date | Patient | Provider | Tooth | Surface | Code | Description | Charge | Other Credits | Guar Estimate | Applied | Balance |
|------------------|-----------------|----------|-------|---------|-------|---------------------------------|--------|---------------|---------------|---------|---------|
| 03/16/2021 | Isaac Chiltepin | Jacob | | | D0160 | Detailed & Extensive Evaluation | 92.00 | 81.00 | 11.00 | 11.00 | 0.00 |
| 03/16/2021 | Isaac Chiltepin | Jacob | | | D0120 | Periodic Evaluation | 54.00 | 0.00 | 10.80 | 10.80 | 43.20 |



When To Use It

- Payment part of the patient visit

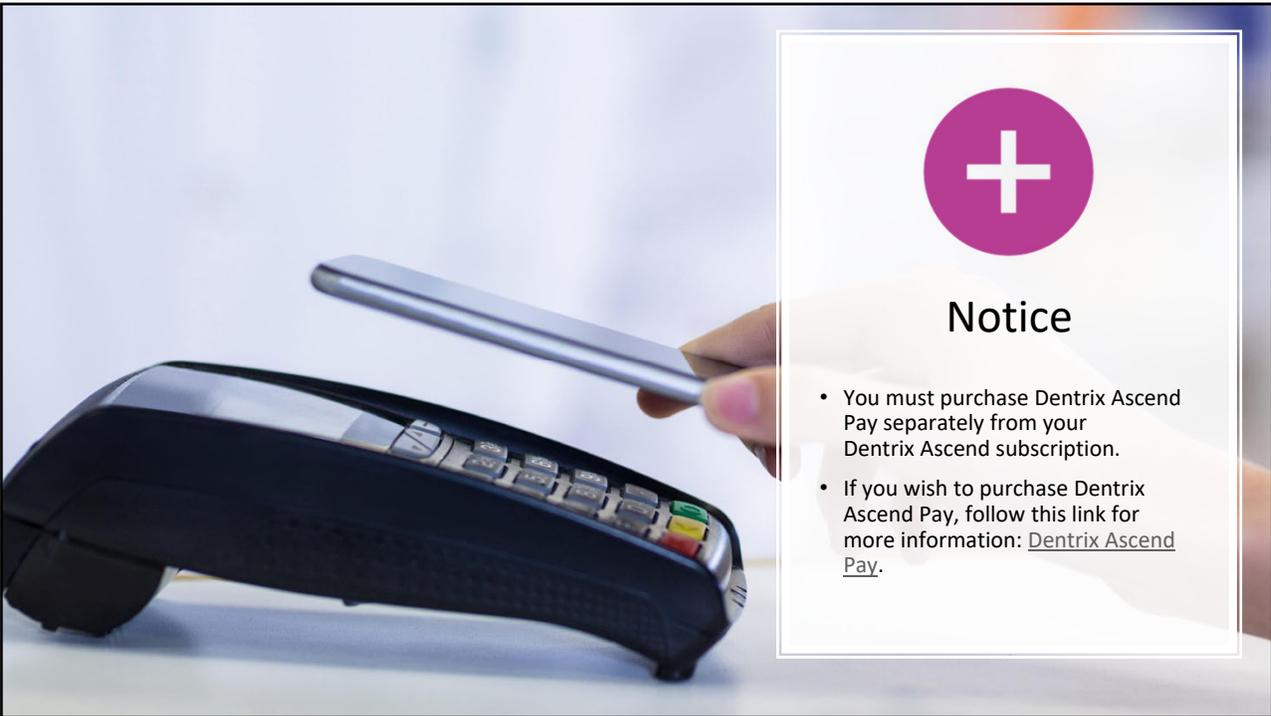


Where to Get Help

- [Dentrix Ascend Pay](#)
- [Dentrix Ascend Pay overview](#)



DENTRIX ASCEND DIGITAL INSIGHTS SERIES HENRY SCHER ONE



Notice

- You must purchase Dentrix Ascend Pay separately from your Dentrix Ascend subscription.
- If you wish to purchase Dentrix Ascend Pay, follow this link for more information: [Dentrix Ascend Pay](#).

Review

| Feature | Included | Additional | Benefit |
|--------------------------------------|----------|------------|--|
| Automated Insurance Eligibility | ✓ | | Let Ascend check eligibility status of patients prior to appointments. |
| Automated Claim Attachment Reminders | ✓ | | Easily submit accurate claims documentation the first time. |
| Automated Collection Reminders | ✓ | | Collect as much as you can at time of service. |
| Patient Online Payments | | ✓ | Get paid faster and offer your patients a convenient payment option. |
| Dentrix Ascend Pay | | ✓ | Native credit card payment functionality in the Ascend Ledger |



Q&A



Dentrix Ascend Online Payments

- Convenient 24/7 online payments
- Maintain cash flow
- Payments automatically post to the Ascend Ledger



[LEARN MORE](#)



Dentrix Ascend Pay

- Accepts most popular payment types such as credit/debit, EMV (chip), magnetic strip, and contactless payments
- Native Dentrix Ascend payment component
- Manages void and refunds and automatically posts to the Ascend Ledger



[LEARN MORE](#)



DENTRIXASCEND
INSIGHTS DIGITAL SERIES
 FALL 2021



Learn even more by viewing on-demand webinars from the series!

[WATCH NOW](#)