Implement a More Profitable Patient Visit Workflow with the Dentrix Ascend Routing Panel

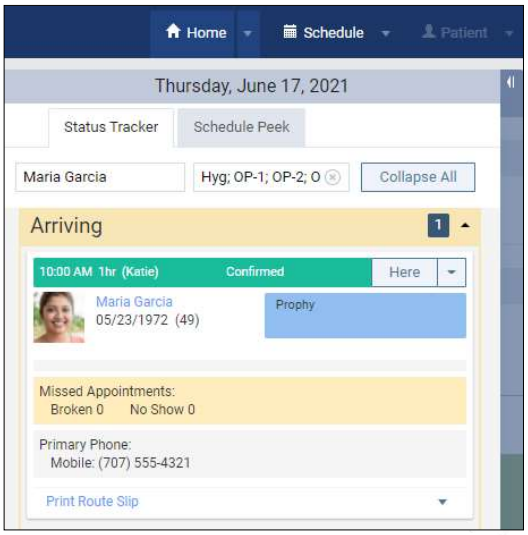
Overview

5 features of the Routing Panel to support your patient visit workflow

What Is It?

- Patient visit status tracker
- See the information you need when you need it

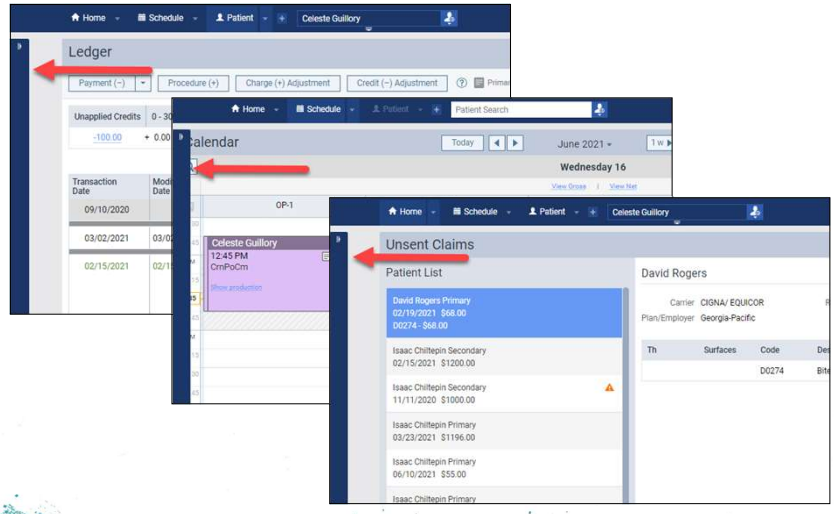
Routing Slip



Routing Panel

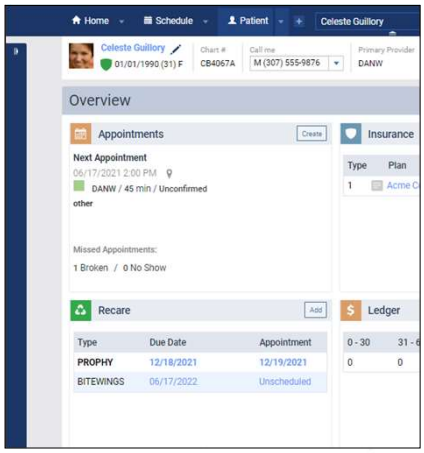
Where to Find It

- Blue side bar
- Open from any page in Ascend

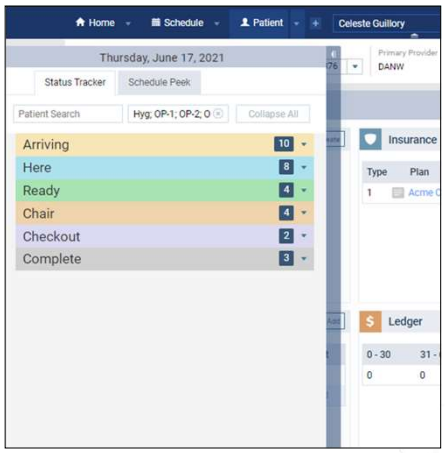


How To Do It

- Just click!

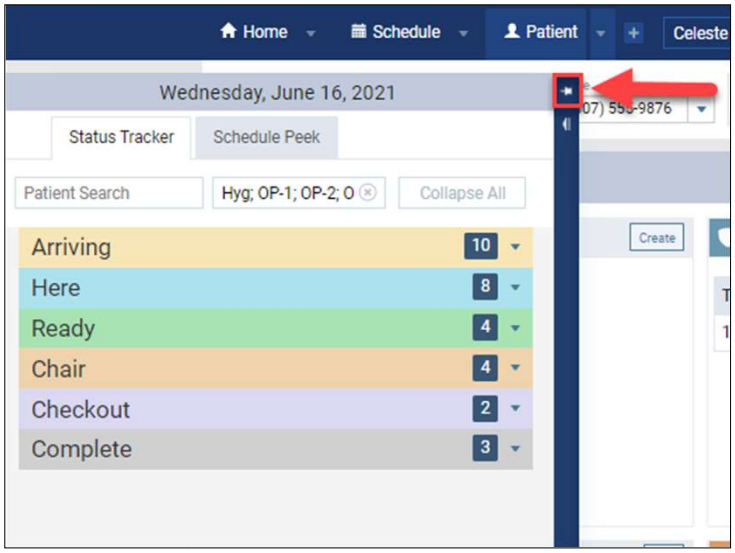


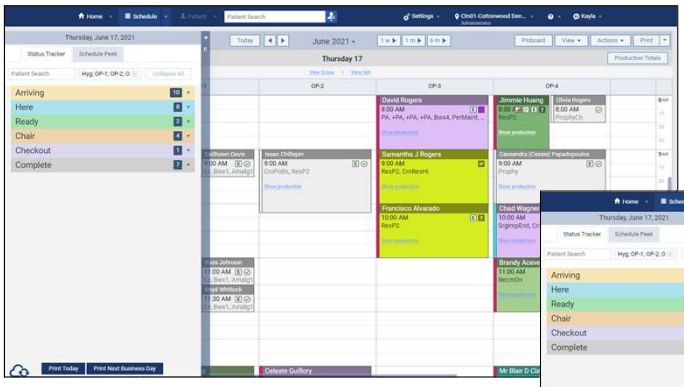
Closed



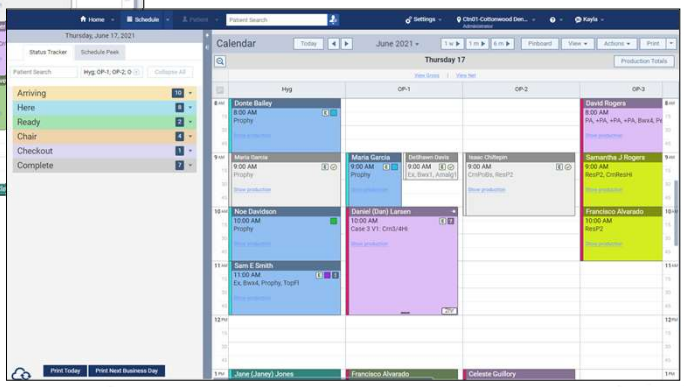
Open

Tip: If you have enough room, anchor the Routing Panel. This allows you to leave it open for quick reference during the day.





Unanchored Panel

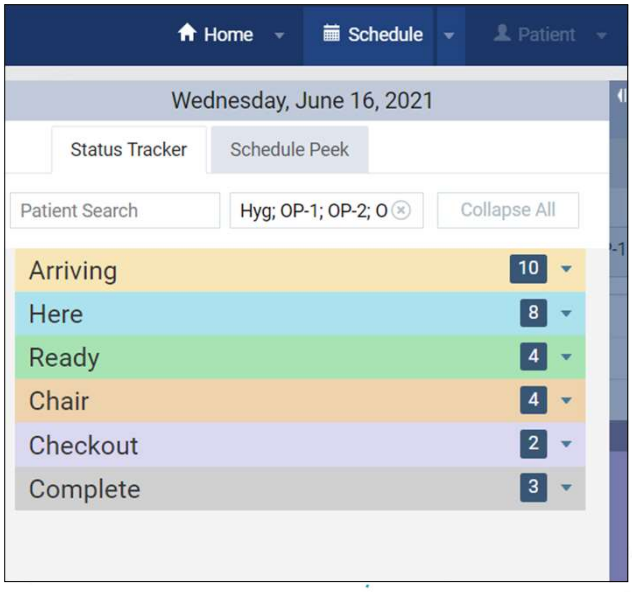


Anchored Panel

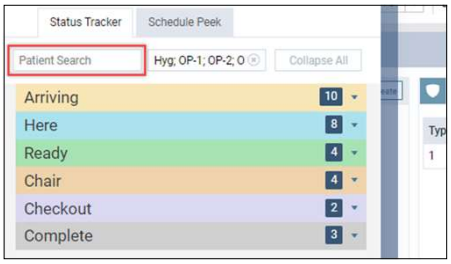
When To Use It

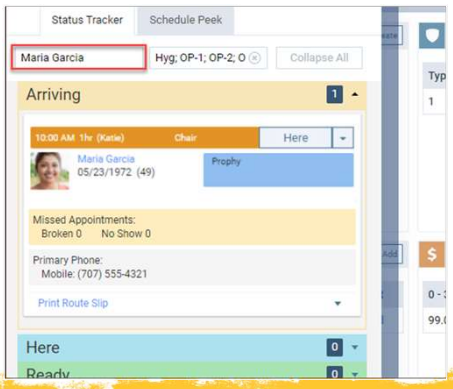
- During the entire patient visit

The numbers in the blue boxes represent how many patients are in each status.



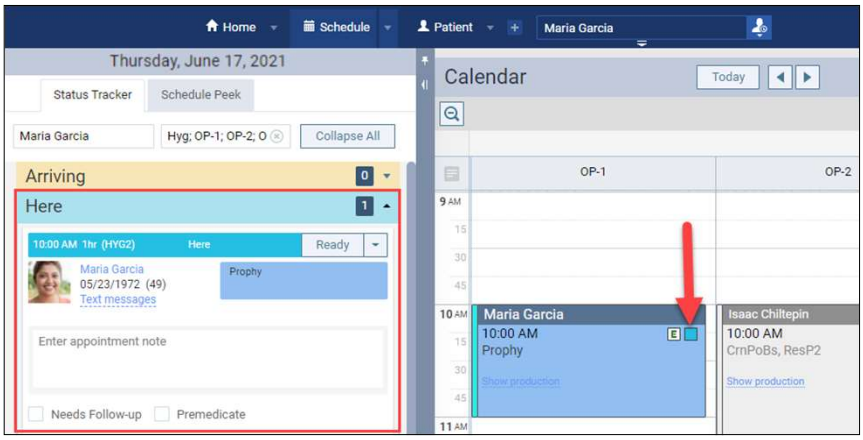
Tip: No need to search through each status. Use the search bar to quickly locate a specific patient.



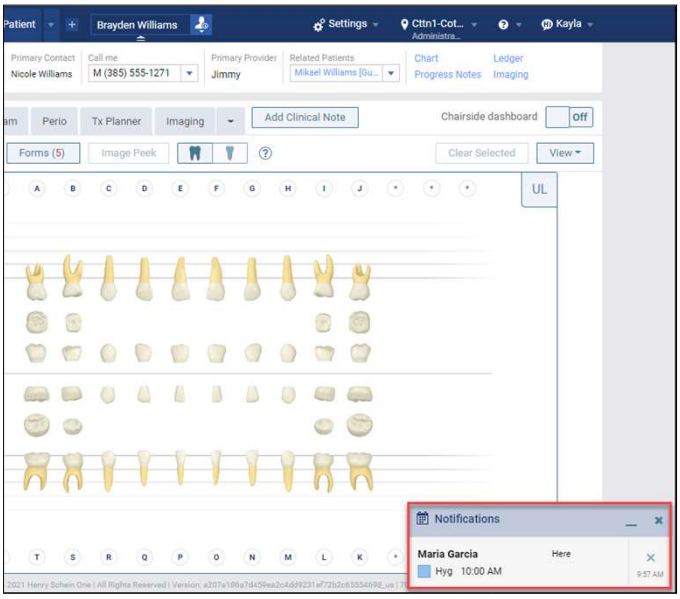


The status from the Routing Panel also shows on the Calendar.

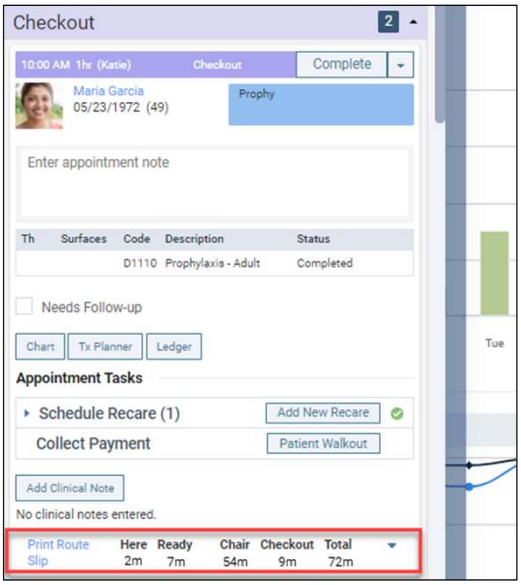
The color of the box on the calendar will change to match the patient's status.



Tip: Subscribe to notifications to be prepared for patients who are changing status.

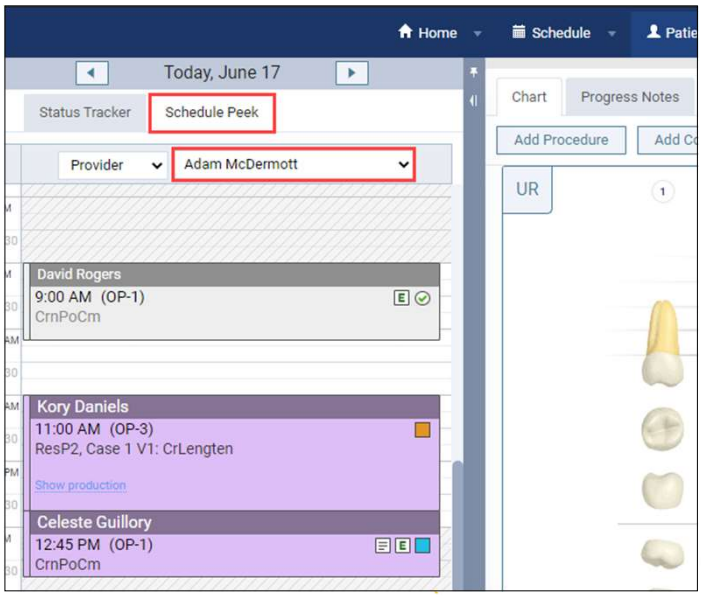


Tip: Improve efficiency by monitoring how much time a patient has spent in each visit status.



Tip: Peek at the schedule without leaving your chart or stopping what you are doing.

Select a provider from the dropdown to see only that provider's appointments.



Virtual Routing Slip: Benefits

Standardized workflow across locations

Transparency about where patients are and how long they've been there

Less training required for new employees because they get led along the visit workflow

Where to Get Help

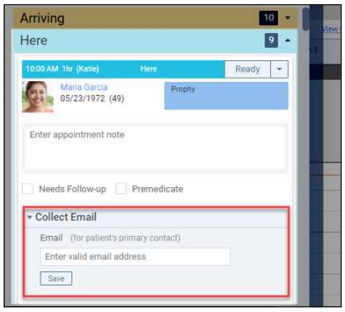
- Using the Routing Panel for Patient Check In
- Using the Routing Panel for Patient Checkout

What Is It?

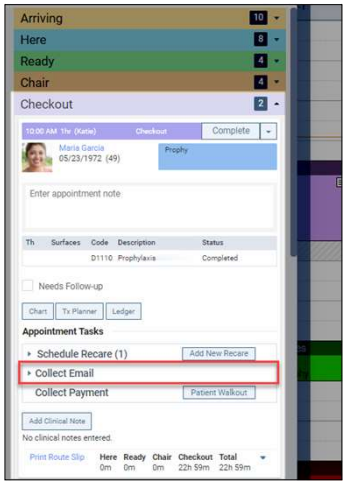
- Automated reminder to capture email addresses and mobile numbers

Where to Find It

- Routing panel appointment card
- Reminder shows more than once:
  - In the **Here** status at the start of the visit
  - In the **Checkout** status at the end of the visit



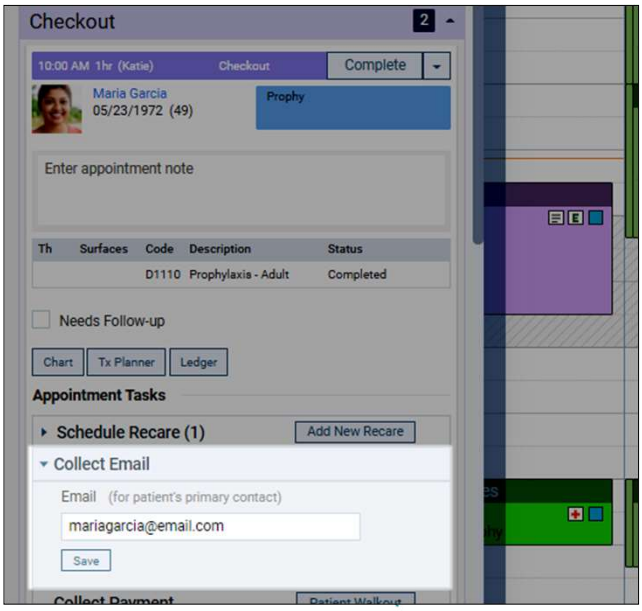
Here Status



Checkout Status

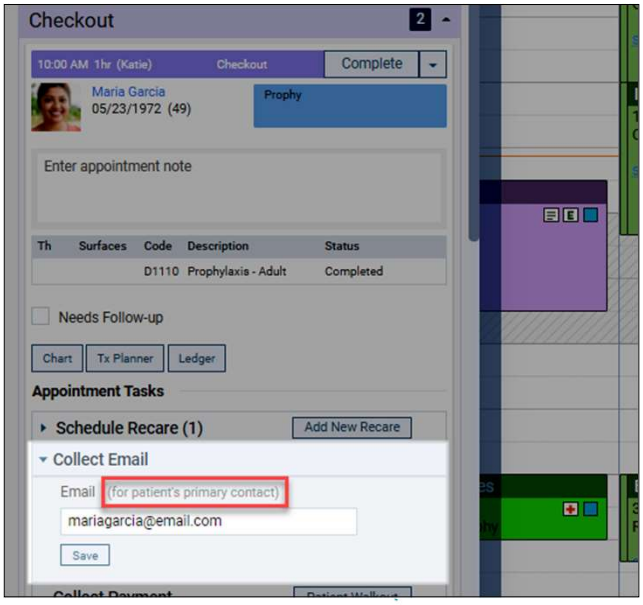
How To Do It

- Add contact information without having to navigate to another page
- Saves to the Basic Info page of the Primary Contact



When To Use It

- Whenever you see the reminder
- **Remember:** This is not necessarily the selected patient's contact information. It is the information for the patient's primary contact.



Contact Info Reminder: Benefits

Allows for automated reminders to be sent to patients

Helps you retain more patients

Where to Get Help

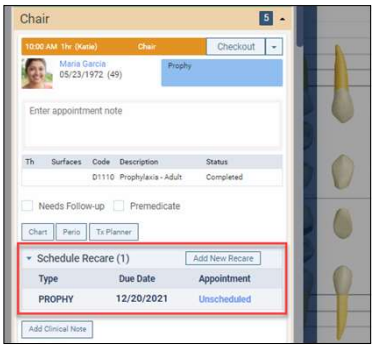
- Improving Patient Retention
- Collecting Missing Contact Information
- Understanding Relationships in Dentrix Ascend

What Is It?

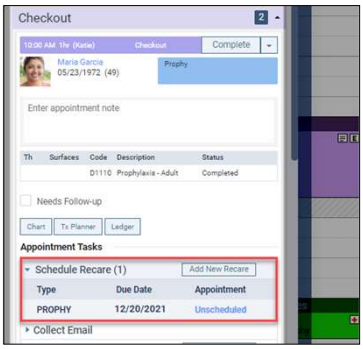
- Automated reminder to schedule recare

Where to Find It

- Routing panel appointment card
- Adaptable to your workflow:
  - Hygienist sees reminder in **Chair** status
  - Front desk sees reminder in **Checkout** status



Chair Status

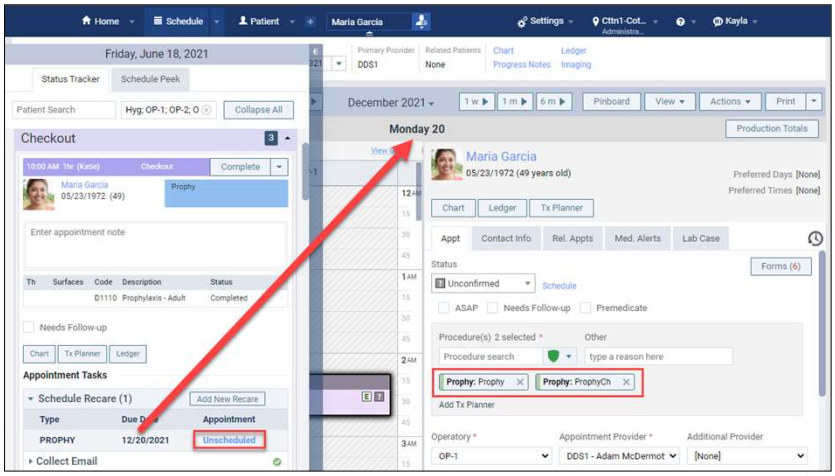


Checkout Status

How To Do It

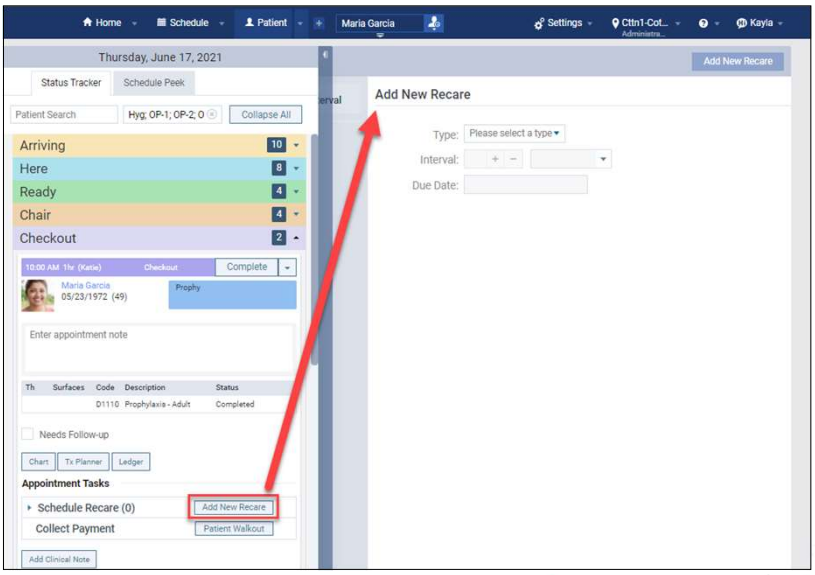
<u>For patients who haven't been preappointed:</u>

- Click **Unscheduled** to automatically open the schedule at the recare due date.



<u>For patients who don't have recare assigned:</u>

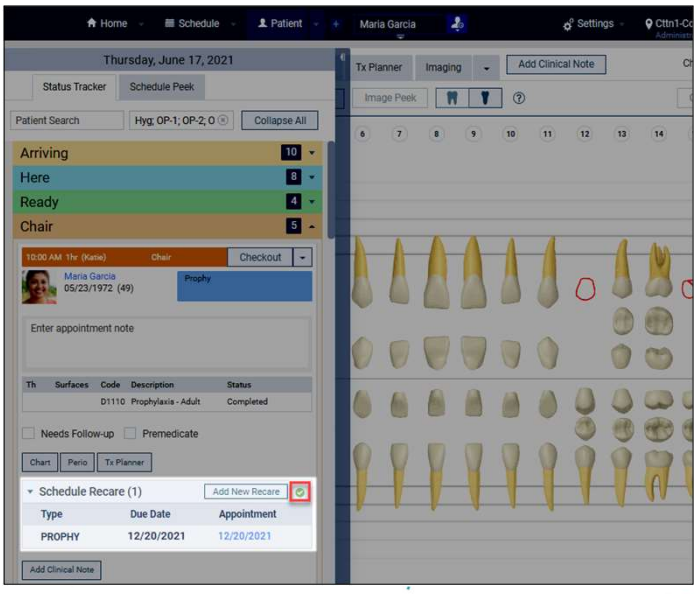
- Click **Add New Recare** to set up the recare type, interval, and due date.



When To Use It

- Whenever you see the reminder

Tip: A green checkmark indicates that a task is completed (e.g., the recare is scheduled)



Schedule Recare Reminder: Benefits

Help patients maintain their oral health

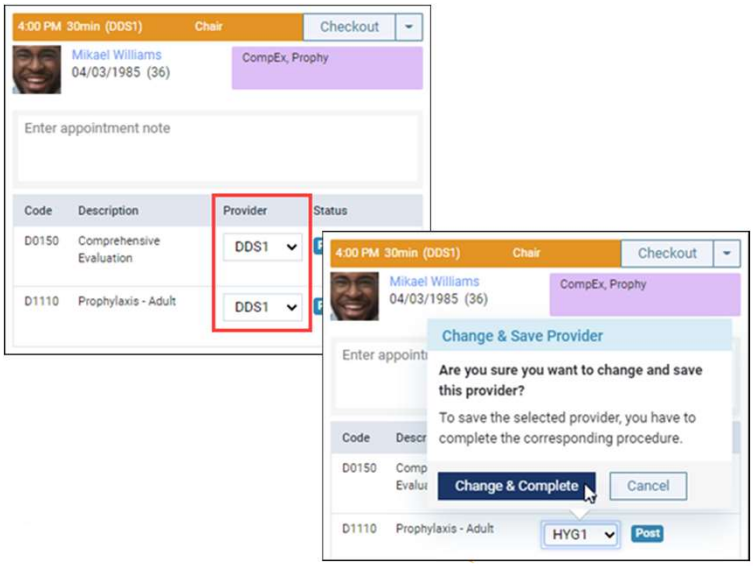
Maintain a full and productive schedule

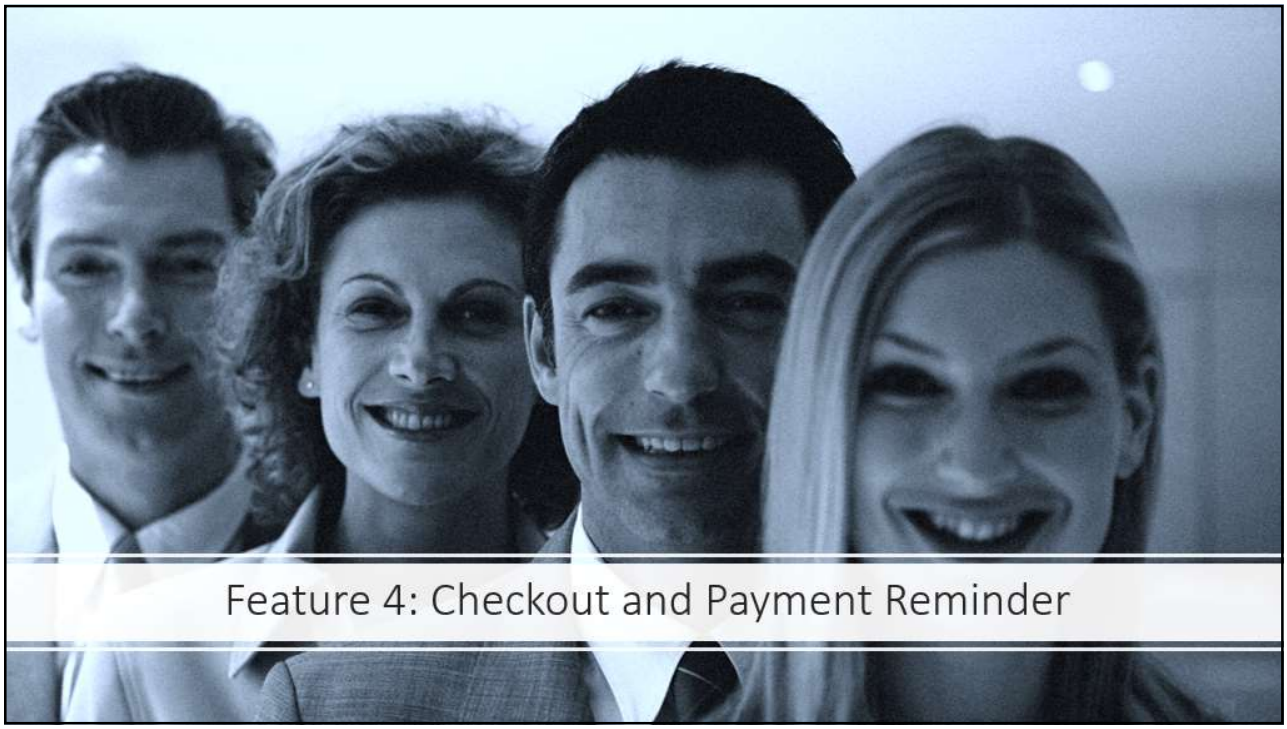
Where to Get Help

- Keeping a Full Schedule
- Scheduling Recare from the Routing Panel

New Feature

- Change the provider for a procedure right in the Routing Panel
- This option is available in the Chair and Checkout Statuses





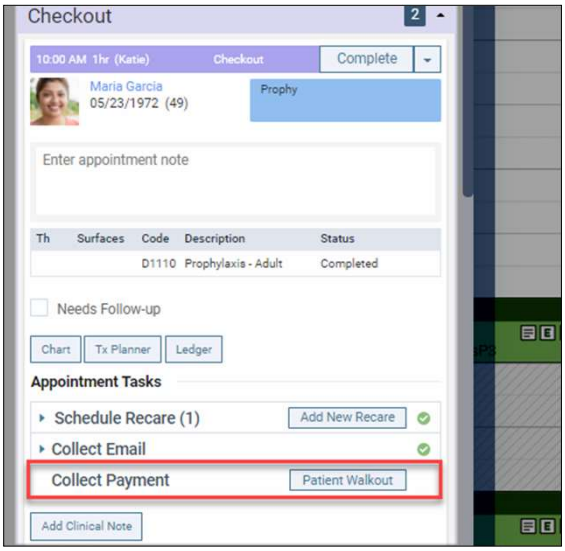
What Is It?

- Automated reminder to collect payment

Where to Find It

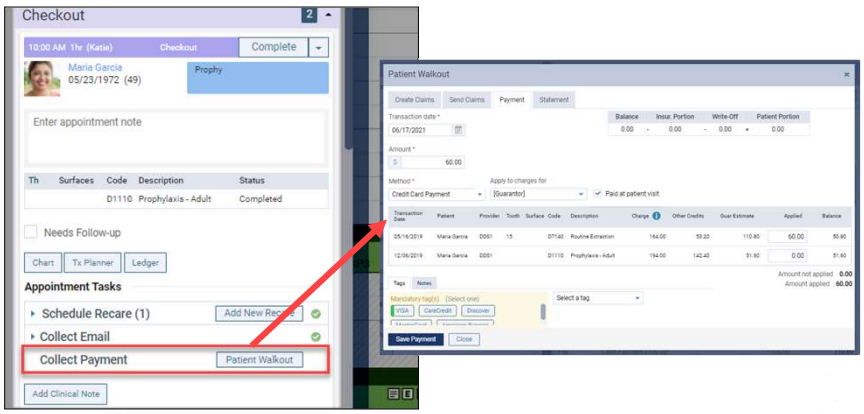
- Routing panel appointment card
- **Checkout** status at the end of the patient visit

If the patient has no balance or if their procedures are 100% covered, you will not see this reminder.



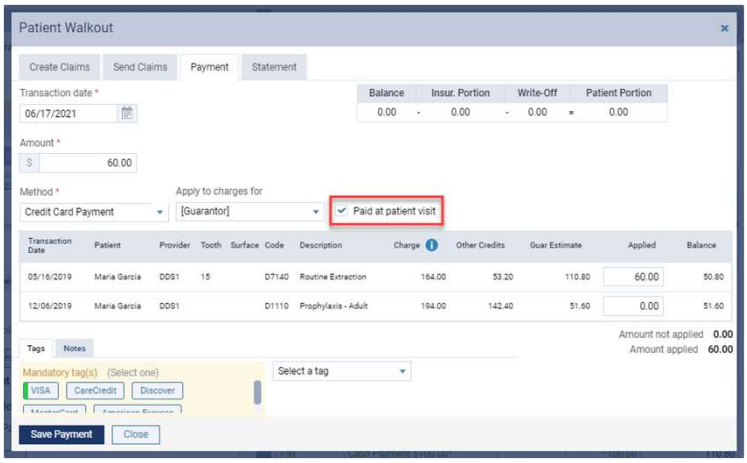
How To Do It

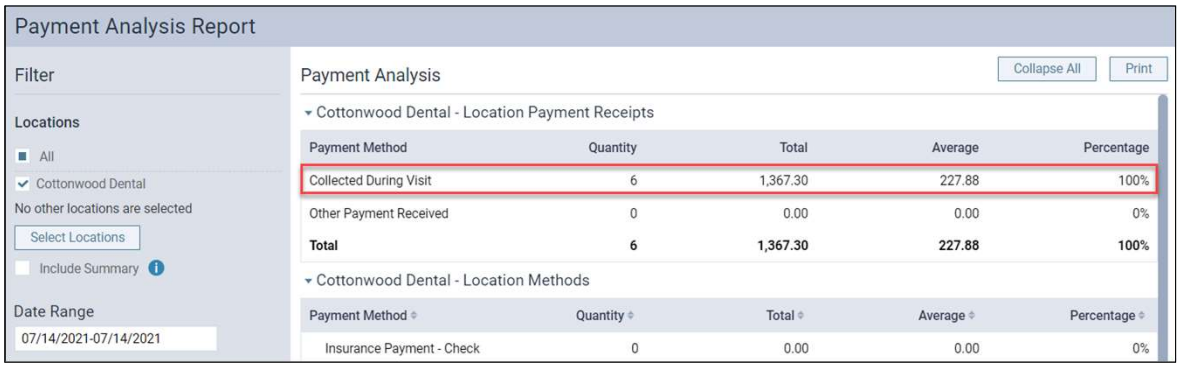
- Click the **Patient Walkout** button to open the Patient Walkout window
- The Patient Walkout dialog box is the same box you can access from the Ledger



Tip: Keep **Paid at patient visit** checked to automatically calculate and report over-the-counter percentage in the Payment Analysis Report.

This box is checked by default.



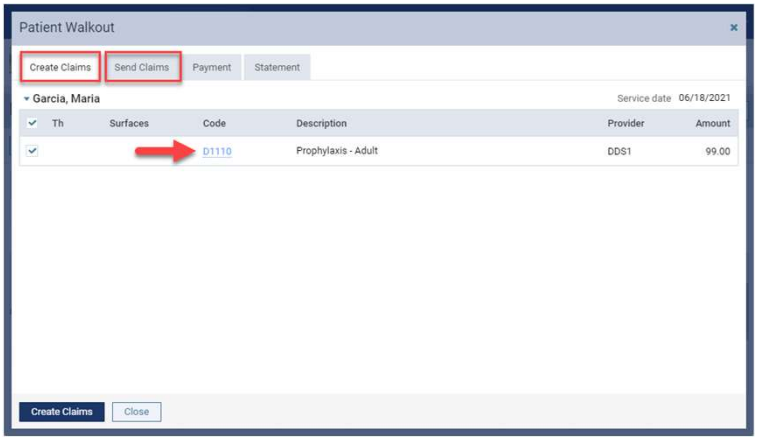


The Payment Analysis Report will show how many payments were Collected During Visit.

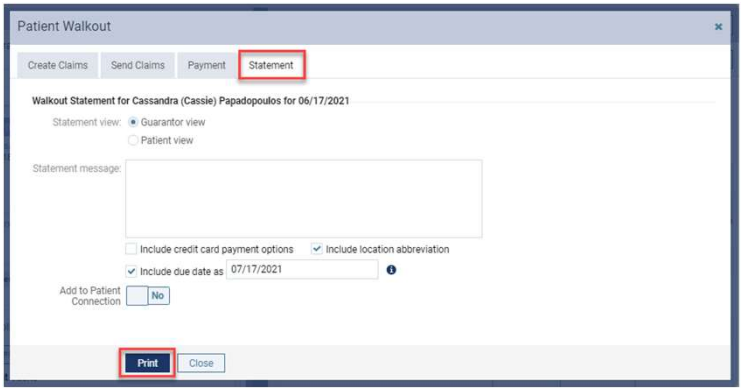
This report can be found in the **Home** menu.

Tip: You can create or send claims for a patient at this time if desired.

Tip: If you notice an error in the provider or amount, click the code hyperlink and make the correction before creating the claim.

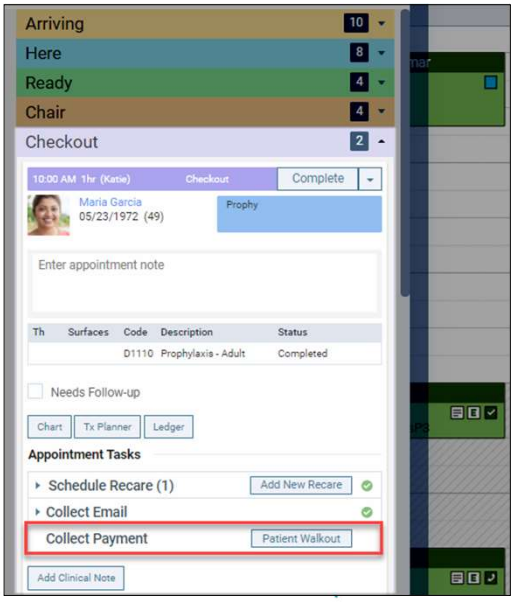


Tip: Here is a shortcut to printing a walkout statement.



When To Use It

- Whenever you see the reminder



Collect Payment Reminders: Benefits

Reduce the amount of money you must collect later

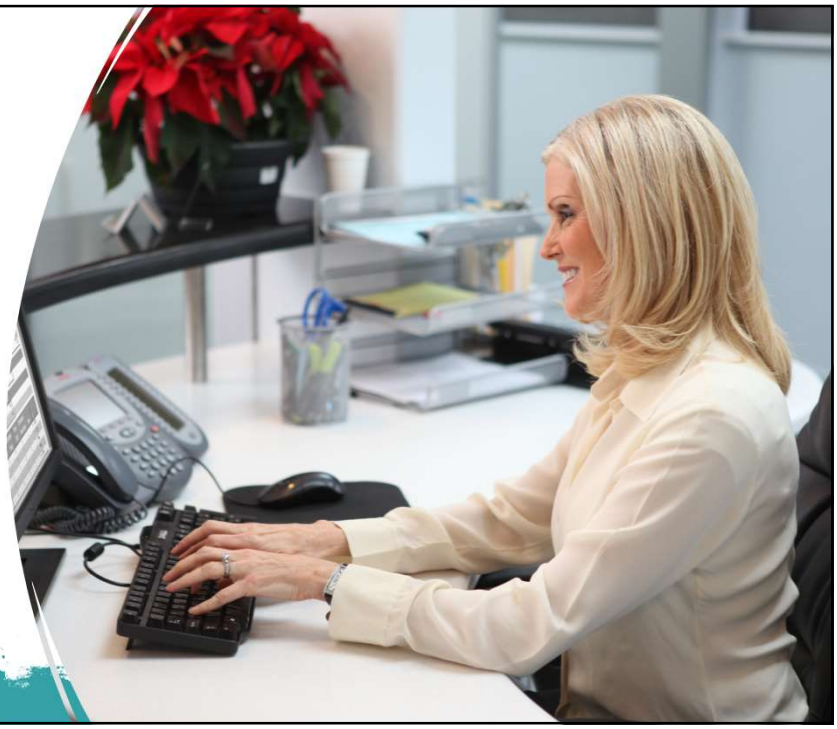
The Patient Walkout dialog steps you through the walkout process

Where to Get Help

- Increasing Over-the-Counter Collections
- Collecting Payment at Patient Checkout
- Updating the Provider Before Completing an Appointment

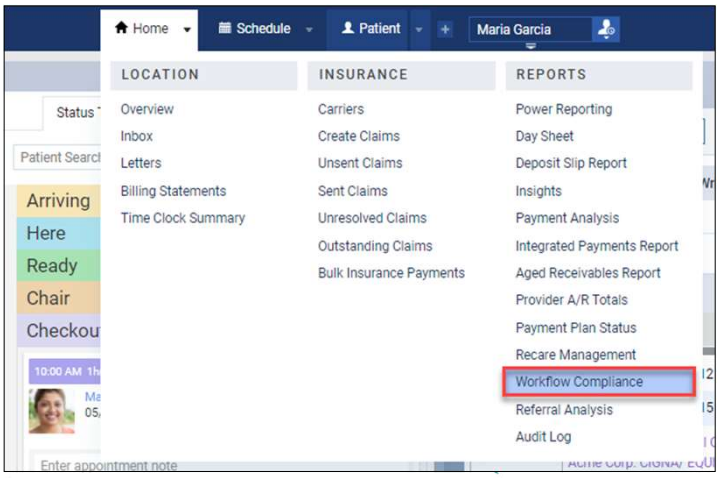
What Is It?

- Workflow Compliance Report
- Shows how well your team is doing with Routing Panel task completion
  - Collect missing contact info
  - Schedule recare
  - Collect payment



Where to Find It

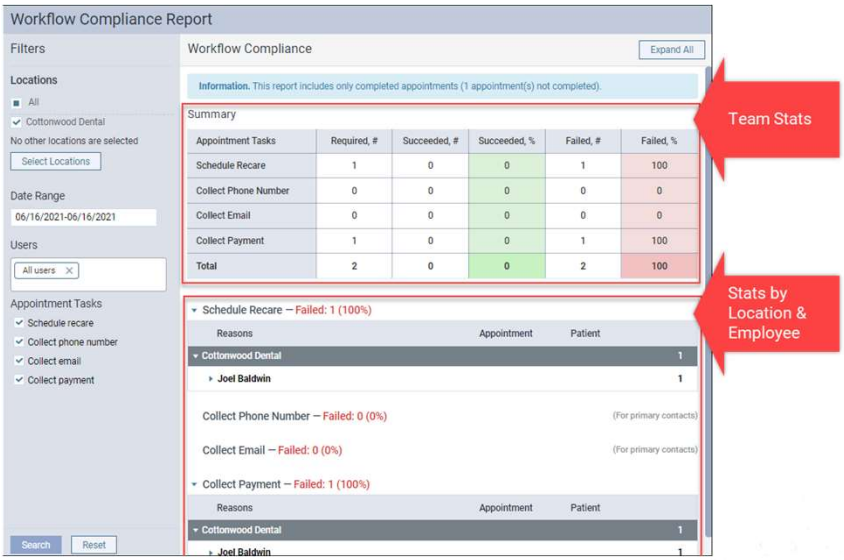
- Home > Workflow Compliance



How To Do It

- See team stats or look at specific locations or employees

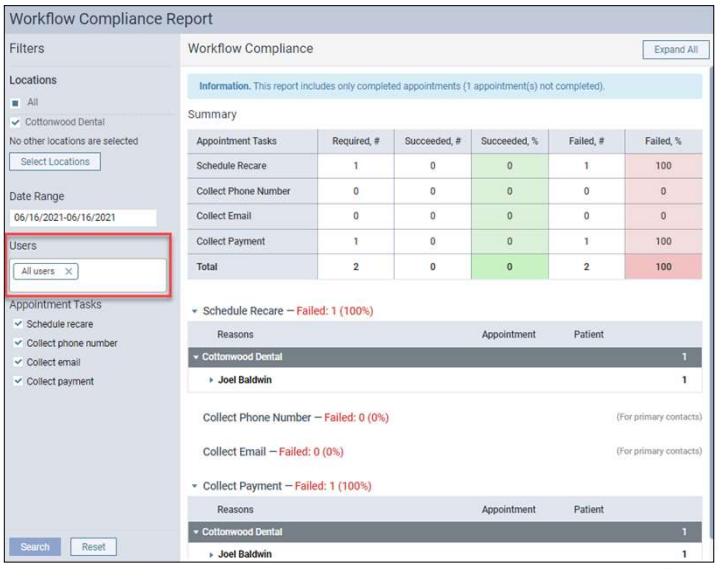
Tip: Incorporate into Daily Huddle



When To Use It

- Periodic monitoring helps improve team performance
- Coach underperformers and reward high performers

Tip: Filter by user for performance reviews



Workflow Compliance Report: Benefits

Monitor and improve consistency in the patient checkout process

Know when your team has achieved goals

Where to Get Help

- Why Use the Patient Exit Workflow in Dentrix Ascend?
- Populating the Workflow Compliance Report

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