

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

PATIENT ROUTE SLIP					
APPOINTMENT TIME / DATE	PROVIDER	OPERATOR	SCHEDULED TIME	APPT AMOUNT	STATUS
10:00AM Thursday, June 17th 2021	Katie	Rbg	1 hr	196.00	CONFIRMED

PATIENT INFORMATION					
Maria Garcia	AGE: 49	DOB: 05/23/1972	DOB1: DDMM	DOB2: MM/DD/YY	DOB3: YYYY-MM-DD
ADDRESS: 804 South 300 West American Fork, UT 84003-0000	LAST VISIT DATE: 12/06/2019 [google]	PRINT TEST DATE: 5/16/2019	LAST TEST DATE: 12/6/2019	NUMBER APPTS: 2	LAST SCHEDULED APPT:
PHONE: (707) 555-4321	PHYSICIAN: Marty Diaz	PTN: *Anyone here a good dentist? - Facebook campaign			

CURRENT ACCOUNT INFORMATION		INSURANCE INFORMATION	
OPERATOR: Maria Garcia	PAYMENT METHOD: 162.40	INSURANCE COMPANY: CIGNA- EQUICOR	PL. ID. CODE: Acme Corp.
ADDRESS: 804 South 300 West American Fork, UT 84003-0000		INSURANCE ID: M456789012	INSURANCE TYPE: Maria Garcia
PHONE: (707) 555-4321		INSURANCE CLASS: 2,000.00	INSURANCE RATE: 0.00
		INSURANCE PLAN: 0.00	INSURANCE DEDUCTIBLE: 0.00
		INSURANCE COVERAGE: 0.00	INSURANCE COINSURANCE: 0.00

Routing Slip



Home Schedule Patient

Thursday, June 17, 2021

Status Tracker Schedule Peek

Maria Garcia Hyg; OP-1; OP-2; O Collapse All

Arriving 1

10:00 AM 1hr (Katie) Confirmed Here

Maria Garcia 05/23/1972 (49) Propy

Missed Appointments: Broken 0 No Show 0

Primary Phone: Mobile: (707) 555-4321

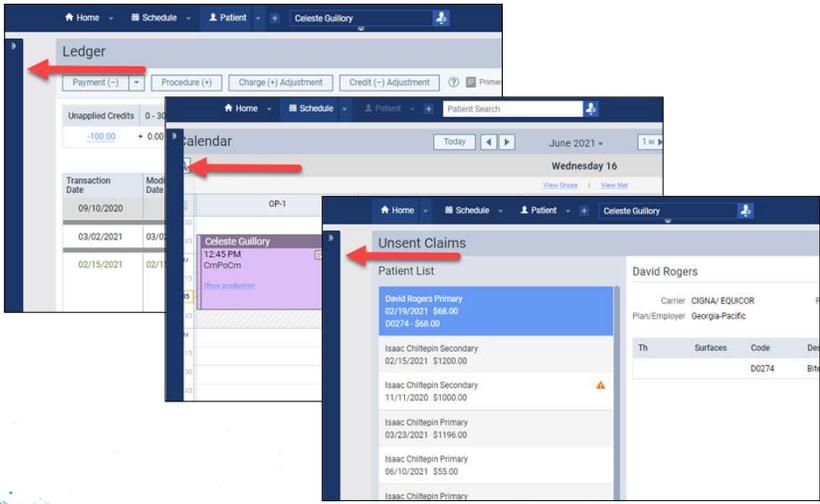
[Print Route Slip](#)

Routing Panel



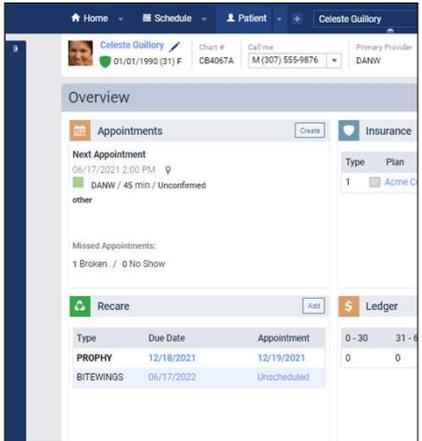
Where to Find It

- Blue side bar
- Open from any page in Ascend

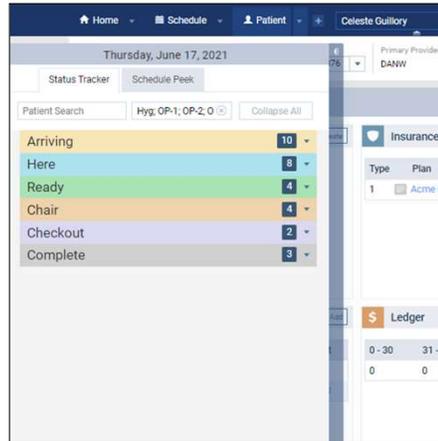


How To Do It

- Just click!



Closed

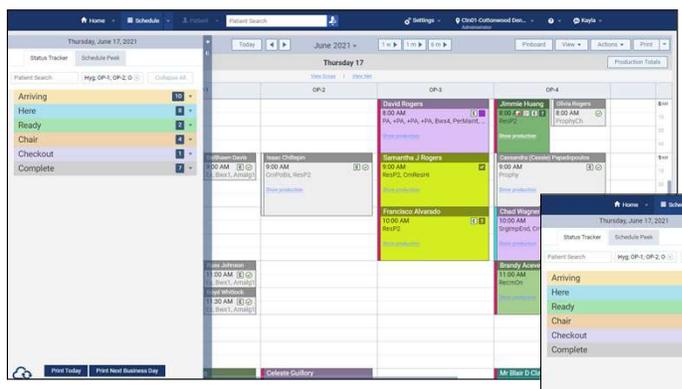
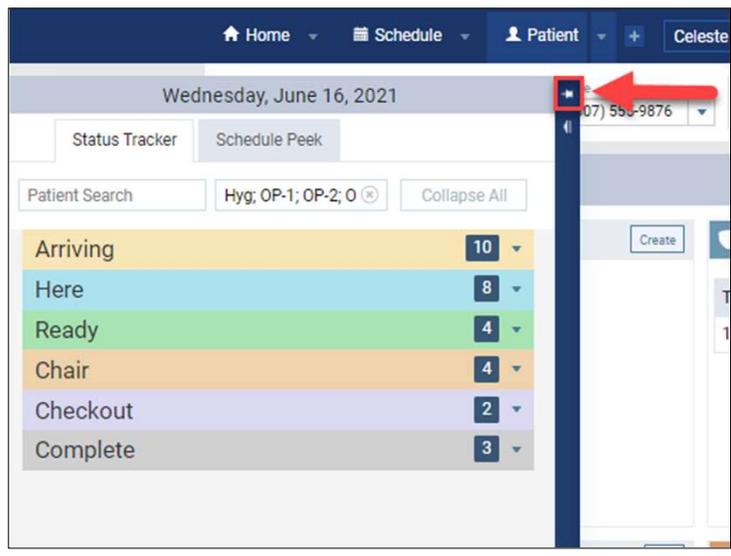


Open

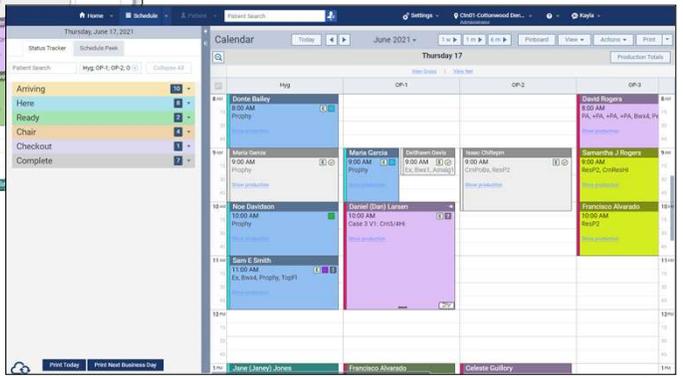




Tip: If you have enough room, anchor the Routing Panel. This allows you to leave it open for quick reference during the day.



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.

Home Schedule Patient

Wednesday, June 16, 2021

Status Tracker Schedule Peek

Patient Search Hyg; OP-1; OP-2; 0 Collapse All

Arriving	10
Here	8
Ready	4
Chair	4
Checkout	2
Complete	3



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

Status Tracker Schedule Peek

Patient Search Hyg; OP-1; OP-2; 0 Collapse All

Arriving	10
Here	8
Ready	4
Chair	4
Checkout	2
Complete	3

Status Tracker Schedule Peek

Maria Garcia Hyg; OP-1; OP-2; 0 Collapse All

Arriving 1

10:00 AM 1hr (Kane) Chair Here

Maria Garcia 05/23/1972 (49) Proply

Missed Appointments: Broken 0 No Show 0

Primary Phone: Mobile: (707) 555-4321

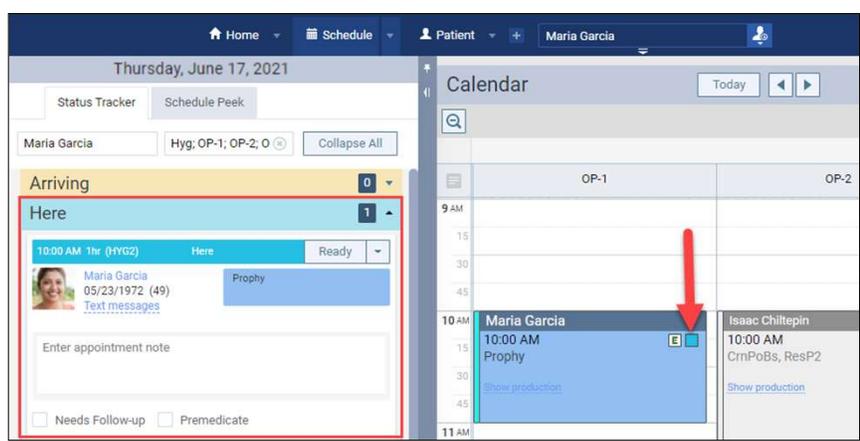
Print Route Slip

Here	0
Ready	0

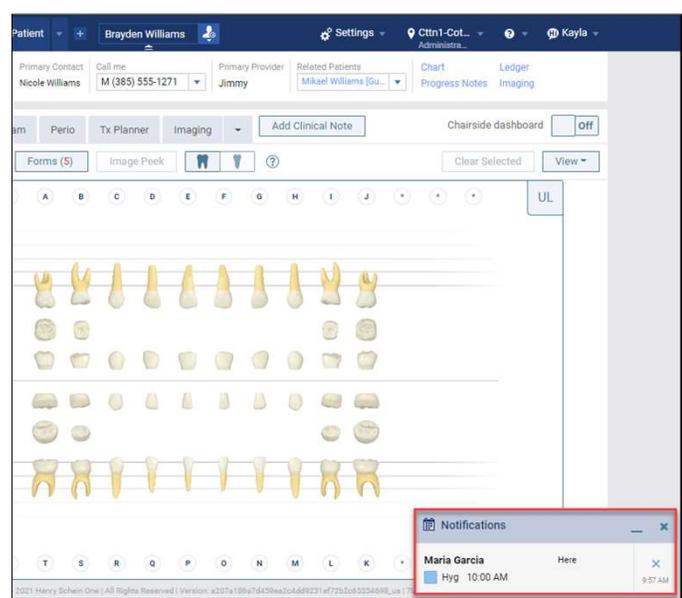


The status from the Routing Panel also shows on the Calendar.

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.

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
 05/23/1972 (49)

Prophy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis - Adult	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

Schedule Recare (1) Add New Recare

Collect Payment Patient Walkout

Add Clinical Note

No clinical notes entered.

Print Route	Here	Ready	Chair	Checkout	Total
Slip	2m	7m	54m	9m	72m



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.

Home Schedule Patient

Today, June 17

Status Tracker **Schedule Peek**

Provider **Adam McDermott**

David Rogers
 9:00 AM (OP-1)
 CrnPocm

Kory Daniels
 11:00 AM (OP-3)
 ResP2, Case 1 V1: CrLengten

Celeste Guillory
 12:45 PM (OP-1)
 CrnPocm

Chart Progress Notes

Add Procedure Add C

UR 1

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

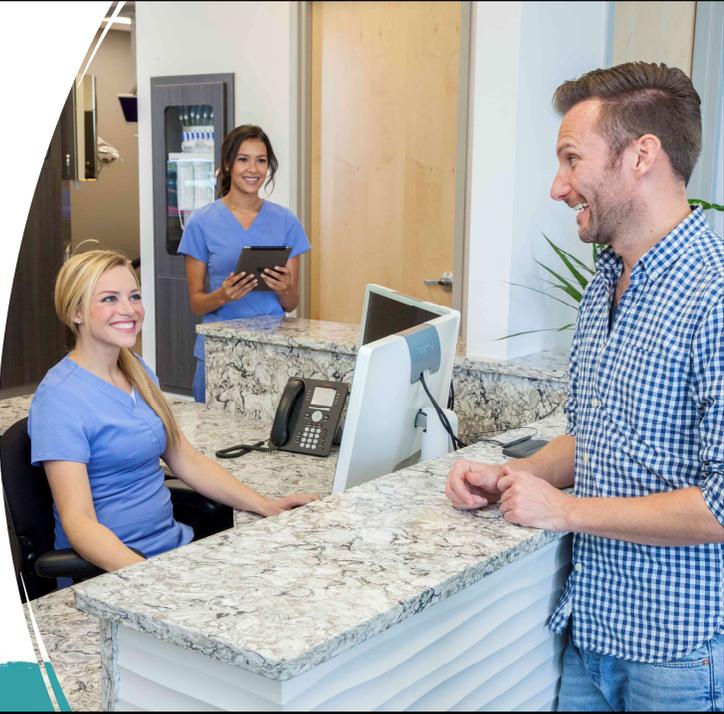
- [Using the Routing Panel for Patient Check In](#)
- [Using the Routing Panel for Patient Checkout](#)





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

Arriving
Here

10:00 AM 1hr (Katie) Here Ready

Maria Garcia
05/23/1972 (49) Prophy

Enter appointment note

Needs Follow-up Premedicate

Collect Email

Email (for patient's primary contact)

Enter valid email address

Save

Here Status

Arriving
Here
Ready
Chair

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
05/23/1972 (49) Prophy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

Schedule Recare (1) Add New Recare

Collect Email

Email (for patient's primary contact)

mariagarcia@email.com

Save

Collect Payment Patient Walkout

Add Clinical Note

No clinical notes entered.

Print Route Slip

	Here	Ready	Chair	Checkout	Total
	0m	0m	0m	22h 59m	22h 59m

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

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
05/23/1972 (49) Prophy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis - Adult	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

Schedule Recare (1) Add New Recare

Collect Email

Email (for patient's primary contact)

mariagarcia@email.com

Save

Collect Payment Patient Walkout



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.

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
05/23/1972 (49) Prophy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis - Adult	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

► Schedule Recare (1) Add New Recare

▼ Collect Email

Email (for patient's primary contact)
mariagarcia@email.com

Save

Contact Info Reminder: Benefits



Allows for automated reminders to be sent to patients



Helps you retain more patients

Where to Get Help

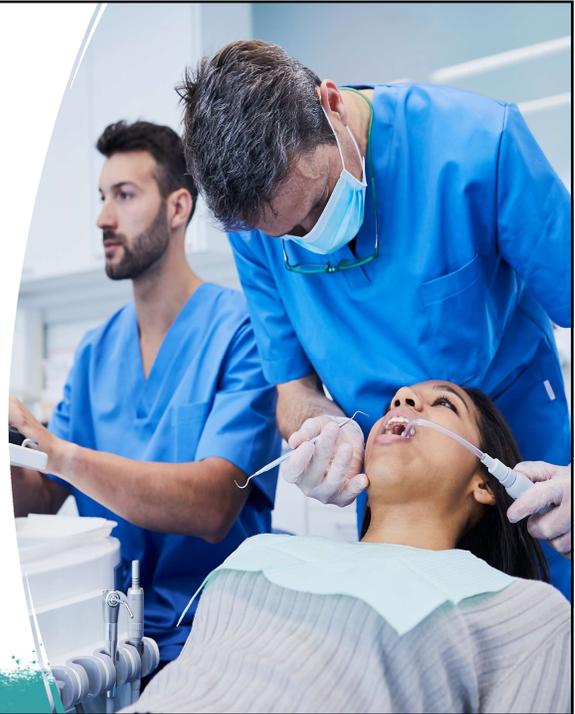
- [Improving Patient Retention](#)
- [Collecting Missing Contact Information](#)
- [Understanding Relationships in Dentrix Ascend](#)



Feature 3: Schedule Recare Reminder

What Is It?

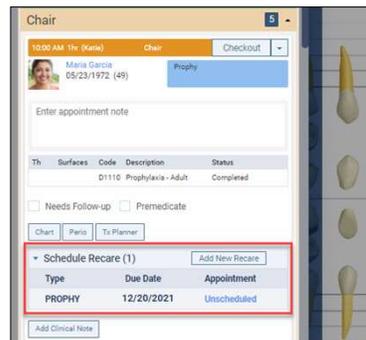
- Automated reminder to schedule recare



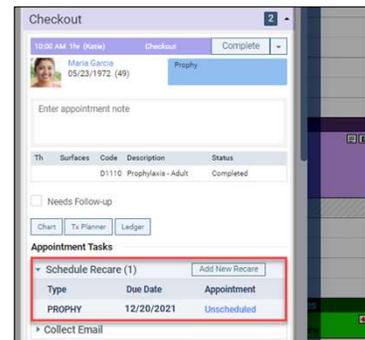
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Where to Find It

- 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

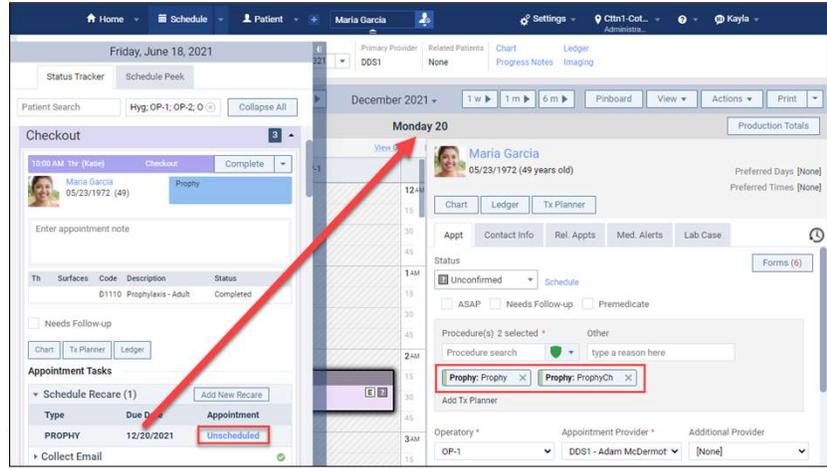
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HENRY SCHEER ONE

 How To Do It

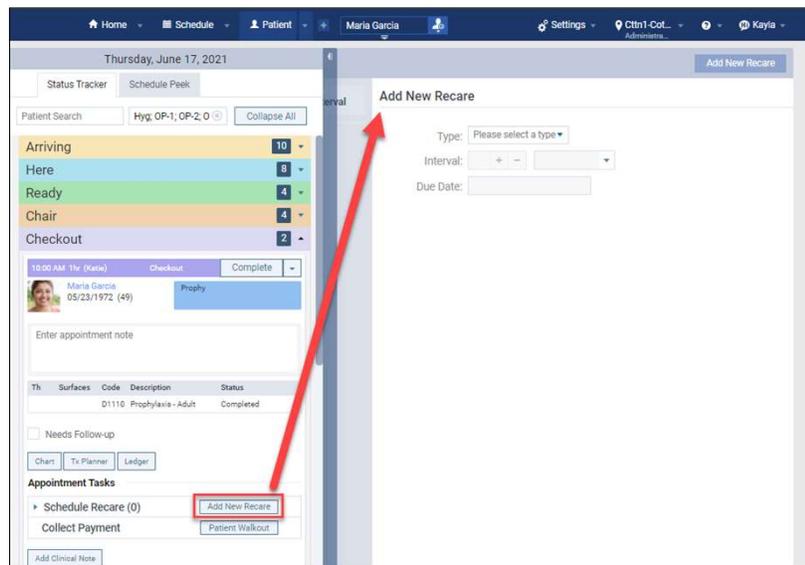
For patients who haven't been preappointed:

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



For patients who don't have recare assigned:

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



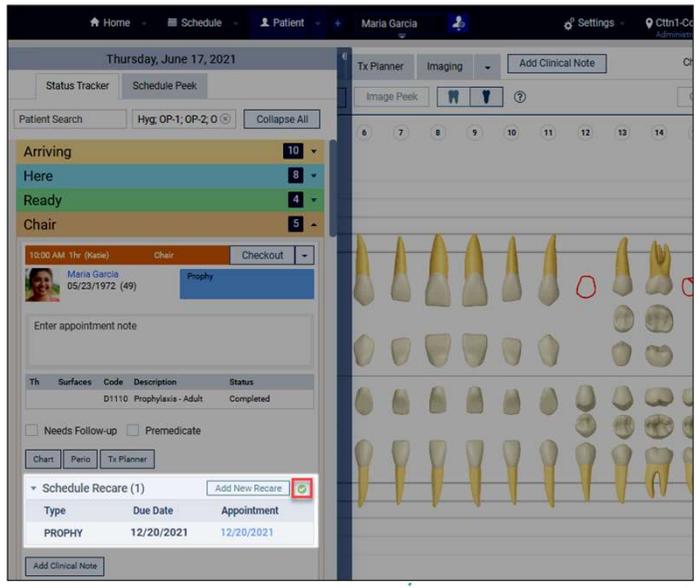


When To Use It

- 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

4:00 PM 30min (DDS1) Chair Checkout

 Mikael Williams
04/03/1985 (36) CompEx, Prophy

Enter appointment note

Code	Description	Provider	Status
D0150	Comprehensive Evaluation	DDS1	
D1110	Prophylaxis - Adult	DDS1	

4:00 PM 30min (DDS1) Chair Checkout

 Mikael Williams
04/03/1985 (36) CompEx, Prophy

Enter appointment note

Change & Save Provider

Are you sure you want to change and save this provider?

To save the selected provider, you have to complete the corresponding procedure.

D0150 Comp Evaluat **Change & Complete** Cancel

D1110 Prophylaxis - Adult HYG1 Post






What Is It?

- Automated reminder to collect payment



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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.

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
05/23/1972 (49) Propy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis - Adult	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

- Schedule Recare (1) Add New Recare
- Collect Email
- Collect Payment** Patient Walkout

Add Clinical Note



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

Checkout

10:00 AM 1hr (Katie) Checkout Complete

Maria Garcia
05/23/1972 (49) Propy

Enter appointment note

Th	Surfaces	Code	Description	Status
		D1110	Prophylaxis - Adult	Completed

Needs Follow-up

Chart Tx Planner Ledger

Appointment Tasks

- Schedule Recare (1) Add New Recare
- Collect Email
- Collect Payment** Patient Walkout

Add Clinical Note

Patient Walkout

Create Claims Send Claims Payment Statement

Transaction date * 06/17/2021

Balance	Inst. Portion	Write Off	Patient Portion
0.00	0.00	0.00	0.00

Amount * 60.00

Method * Credit Card Payment Apply to charges for [separator] Paid at patient visit

Transaction Date	Patient	Provider	Tooth	Surface	Code	Description	Charge	Other Credits	Est. Estimate	Applied	Balance
05/16/2019	Maria Garcia	D091	15	D7140		Routine Extraction	164.00	59.20	110.80	50.00	59.80
10/06/2019	Maria Garcia	D091			D1110	Prophylaxis - Adult	194.00	142.40	51.60	0.00	51.60

Type Note

Mandatory (tag) (Select one)

INITIAL CaseCredit Discharge

Select a tag

Save Payment Close

Amount not applied: 0.00
Amount applied: 60.00



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 screenshot shows the 'Patient Walkout' window with the 'Payment' tab selected. The 'Apply to charges for' dropdown menu is set to 'Paid at patient visit', which is highlighted with a red box. Below this, a table lists transactions with columns for Date, Patient, Provider, Tooth, Surface, Code, Description, Charge, Other Credits, Guar Estimate, Applied, and Balance.

Transaction Date	Patient	Provider	Tooth	Surface	Code	Description	Charge	Other Credits	Guar Estimate	Applied	Balance
05/16/2019	Maria Garcia	DDS1	15		D7140	Routine Extraction	164.00	59.20	110.80	60.00	50.80
12/06/2019	Maria Garcia	DDS1			D1110	Prophylaxis - Adult	194.00	142.40	51.60	0.00	51.60



Payment Analysis Report

Filter: Locations: All, Cottonwood Dental (checked). Date Range: 07/14/2021-07/14/2021.

Payment Analysis

▼ Cottonwood Dental - Location Payment Receipts

Payment Method	Quantity	Total	Average	Percentage
Collected During Visit	6	1,367.30	227.88	100%
Other Payment Received	0	0.00	0.00	0%
Total	6	1,367.30	227.88	100%

▼ Cottonwood Dental - Location Methods

Payment Method	Quantity	Total	Average	Percentage
Insurance Payment - Check	0	0.00	0.00	0%

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

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

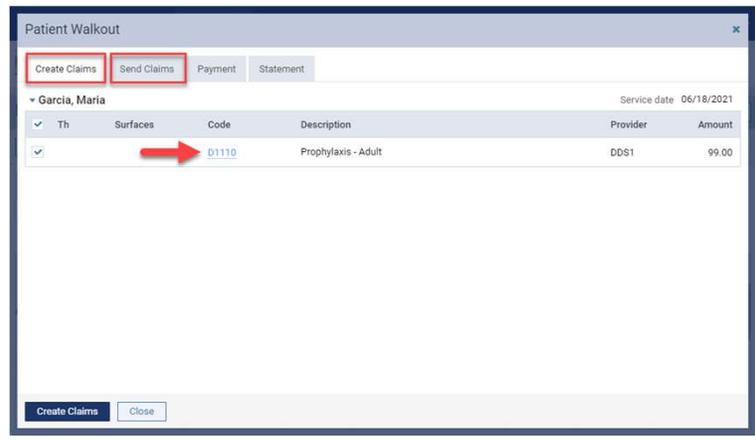




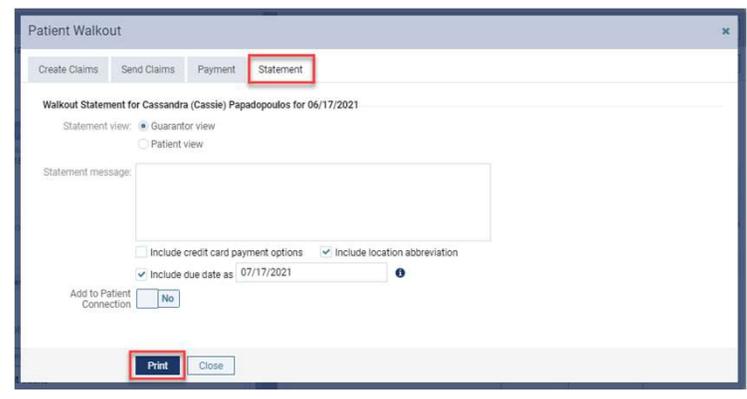
Tip: You can create or send claims for a patient at this time if desired.



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



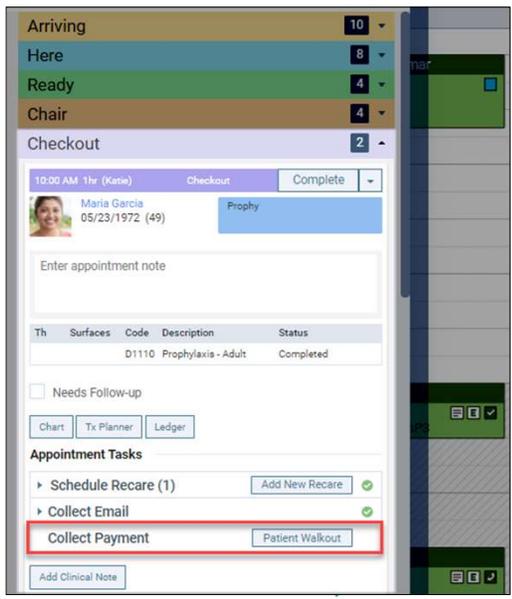
Tip: Here is a shortcut to printing a walkout statement.





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



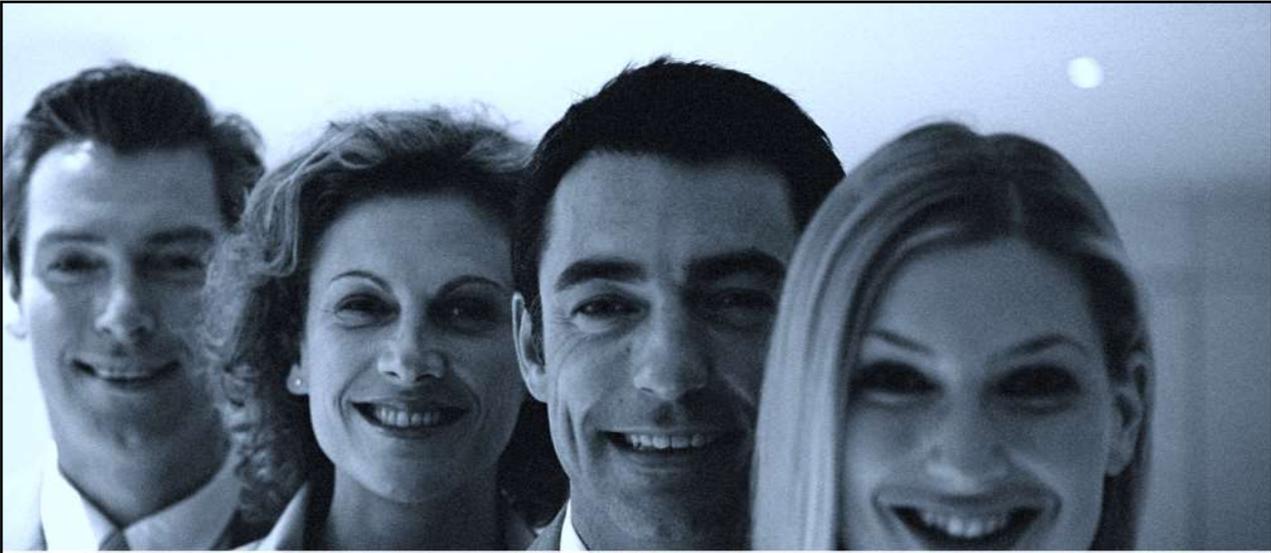
Where to Get Help

- [Increasing Over-the-Counter Collections](#)
- [Collecting Payment at Patient Checkout](#)
- [Updating the Provider Before Completing an Appointment](#)



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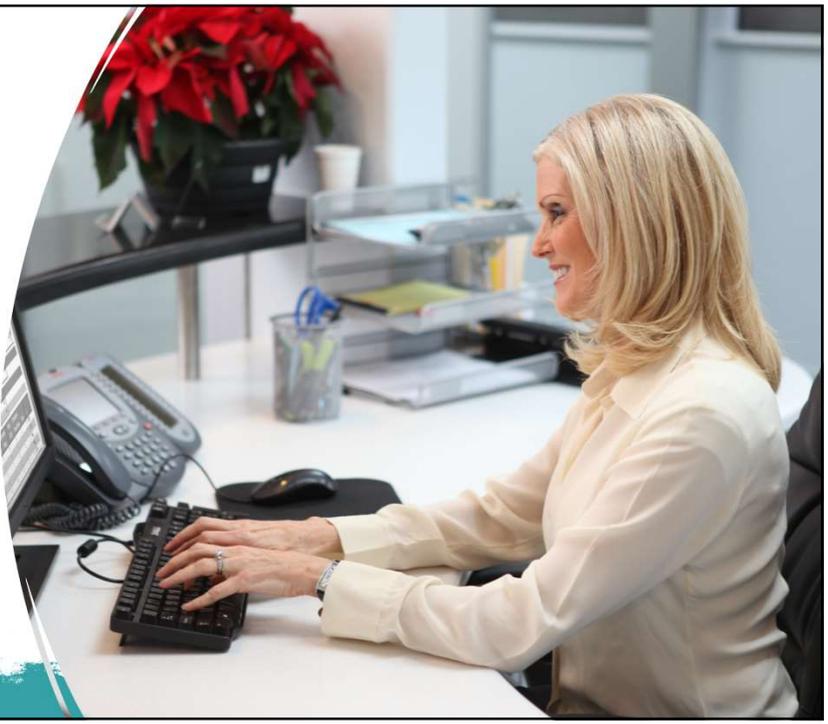
HENRY SCHEIN ONE



Feature 5: Improving Team Performance

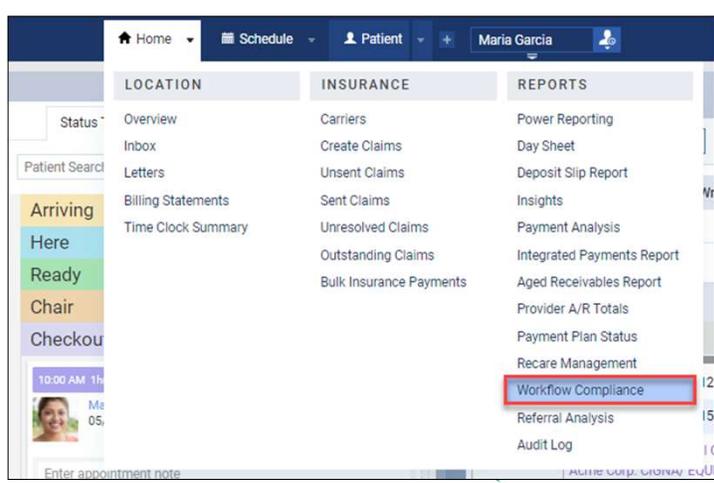
What Is It?

- 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

Workflow Compliance Report

Filters: Workflow Compliance Expand All

Information: This report includes only completed appointments (1 appointment(s) not completed).

Summary

Appointment Tasks	Required, #	Succeeded, #	Succeeded, %	Failed, #	Failed, %
Schedule Recare	1	0	0	1	100
Collect Phone Number	0	0	0	0	0
Collect Email	0	0	0	0	0
Collect Payment	1	0	0	1	100
Total	2	0	0	2	100

Schedule Recare -- Failed: 1 (100%)

Reasons	Appointment	Patient
Cottonwood Dental		1
Joel Baldwin		1

Collect Phone Number -- Failed: 0 (0%) (For primary contacts)

Collect Email -- Failed: 0 (0%) (For primary contacts)

Collect Payment -- Failed: 1 (100%)

Reasons	Appointment	Patient
Cottonwood Dental		1
Joel Baldwin		1

Team Stats

Stats by Location & Employee



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

Filters: Workflow Compliance Expand All

Information: This report includes only completed appointments (1 appointment(s) not completed).

Summary

Appointment Tasks	Required, #	Succeeded, #	Succeeded, %	Failed, #	Failed, %
Schedule Recare	1	0	0	1	100
Collect Phone Number	0	0	0	0	0
Collect Email	0	0	0	0	0
Collect Payment	1	0	0	1	100
Total	2	0	0	2	100

Schedule Recare -- Failed: 1 (100%)

Reasons	Appointment	Patient
Cottonwood Dental		1
Joel Baldwin		1

Collect Phone Number -- Failed: 0 (0%) (For primary contacts)

Collect Email -- Failed: 0 (0%) (For primary contacts)

Collect Payment -- Failed: 1 (100%)

Reasons	Appointment	Patient
Cottonwood Dental		1
Joel Baldwin		1



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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