

Practice Success



Production, Collection, and Growth: How Did You Do Last Year?

Presenter Introduction

Jo Lowery

- Over 32 years of experience in the dental field.
- Certified trainer for Henry Schein since 2011.
- Awarded Dentrrix Ascend Trainer of the Year in 2017.
- Loves the living breathing nature of Dentrrix Ascend and is always excited to see what efficiencies Ascend brings to dentistry next!



Presenter Introduction

Annie Blanco

- Henry Schein One Practice Consultant.
- Over 20 years of experience in the dental field.
- Past Dentrrix and Dentrrix Ascend Trainer. 2017 Rookie of the Year.
- An expert on best practice solutions for operating a successful and profitable business.



Practice Success



Production, Collection, and Growth: How Did You Do Last Year?

In this webinar, you will learn to evaluate your:



Production Totals and Trends



Collection Success



Practice Growth

Production and Collection in Dentrix Ascend

01/17/2023	01/17/2023	D2750	Porcelain/HNM Crown Th: 15	DDS1	1,256.00
01/17/2023	01/17/2023	Ins	PAYMENT RECEIVED Primary Dental Claim for Georgia-Pacific CIGNA/ EQUICOR (\$1256.00)		
01/17/2023	01/17/2023	Adj	Insurance Adjustment \$356.00 (A)		-356.00
01/27/2023	01/27/2023	Pay	Insurance Payment - Electronic \$427.50		-427.50
01/17/2023	01/17/2023	Pay	Credit Card Payment \$462.50		-462.50

Production

- **Gross Production** is any charge that is added the patient's Ledger.
- **Net Production** is after any discounts, write-offs, and adjustments.

Collection

- **Collection** is the amount you collect from patient payments and insurance payments.

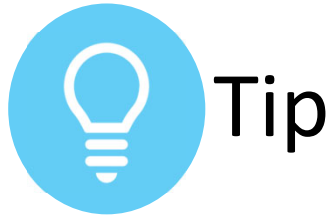
Settings > Ledger Options

Ledger

Payment (-) ▾
Procedure (+)
Charge (+) Adjustment
Credit (-) Adjustment

Transaction Types
Ledger Rules

Payment Methods	Charge Adjustment	Credit Adjustment
<input checked="" type="checkbox"/> Insurance Payment - Check ✎	<input checked="" type="checkbox"/> Charge Adjustment ✎	<input checked="" type="checkbox"/> Bankruptcy Write-off ✎
<input checked="" type="checkbox"/> Insurance Payment - Electronic ✎	<input checked="" type="checkbox"/> Collected Bad Debt ✎	<input checked="" type="checkbox"/> Charitable Contribution ✎
<input checked="" type="checkbox"/> Insurance Payment - Credit Card ✎	<input checked="" type="checkbox"/> Electronic Check Credit ✎	<input checked="" type="checkbox"/> Credit Adjustment ✎
<input type="checkbox"/> Check Payment ✎	<input checked="" type="checkbox"/> Initial Balance Forward ✎	<input checked="" type="checkbox"/> Family/Friend Courtesy ✎
<input checked="" type="checkbox"/> Cash Payment ✎	<input checked="" type="checkbox"/> Insurance Adjustment ✎	<input checked="" type="checkbox"/> Full Payment Courtesy ✎
<input checked="" type="checkbox"/> Credit Card Payment ✎	<input checked="" type="checkbox"/> Insurance Over-pmt Refund ✎	<input checked="" type="checkbox"/> Initial Credit Balance Forward ✎
<input checked="" type="checkbox"/> Patient Financing Payment ✎	<input checked="" type="checkbox"/> NSF Bank Fee ✎	<input checked="" type="checkbox"/> In-office Write-off ✎
<input checked="" type="checkbox"/> Electronic Transfer Payment ✎	<input checked="" type="checkbox"/> NSF Check ✎	<input checked="" type="checkbox"/> Insurance Adjustment ✎
	<input checked="" type="checkbox"/> Patient Refund ✎	<input checked="" type="checkbox"/> Professional Courtesy ✎
	<input checked="" type="checkbox"/> Sales Tax ✎	<input type="checkbox"/> Senior Citizen Courtesy ✎
	<input checked="" type="checkbox"/> Transfer Charge Balance ✎	<input checked="" type="checkbox"/> Staff Courtesy ✎
	<input checked="" type="checkbox"/> Ins Charge Offsetting Adjustment ✎	<input checked="" type="checkbox"/> Transfer Credit Balance ✎
	<input checked="" type="checkbox"/> Credit Card Refund ✎	<input checked="" type="checkbox"/> Write-off ✎
	<input checked="" type="checkbox"/> Credit Card Void ✎	<input checked="" type="checkbox"/> Offsetting Adjustment ✎
		<input checked="" type="checkbox"/> Discount ✎



Common Adjustments & How to Use Each One

This article helps you decide which adjustments to use for your practice.

In order to have accurate patient ledgers and reports, you need to use the proper adjustment - depending on whether you want to:

- impact production or collection.
- increase or reduce the patient account.

Ledger

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment

Ledger Options

Transaction Types Ledger Rules

Payment Methods	Charge Adjustment	Credit Adjustment
<input checked="" type="checkbox"/> Insurance Payment - Check	<input checked="" type="checkbox"/> Charge Adjustment	<input checked="" type="checkbox"/> Bankruptcy Write-off
<input checked="" type="checkbox"/> Insurance Payment - Electronic	<input checked="" type="checkbox"/> Collected Bad Debt	<input checked="" type="checkbox"/> Charitable Contribution
<input checked="" type="checkbox"/> Insurance Payment - Credit Card	<input checked="" type="checkbox"/> Electronic Check Credit	<input checked="" type="checkbox"/> Credit Adjustment
<input type="checkbox"/> Check Payment	<input checked="" type="checkbox"/> Initial Balance Forward	<input checked="" type="checkbox"/> Family/Friend Courtesy
<input checked="" type="checkbox"/> Cash Payment	<input checked="" type="checkbox"/> Insurance Adjustment	<input checked="" type="checkbox"/> Full Payment Courtesy
<input checked="" type="checkbox"/> Credit Card Payment	<input checked="" type="checkbox"/> Insurance Over-pmt Refund	<input checked="" type="checkbox"/> Initial Credit Balance Forward
<input checked="" type="checkbox"/> Patient Financing Payment	<input checked="" type="checkbox"/> NSF Bank Fee	<input checked="" type="checkbox"/> In-office Write-off
<input checked="" type="checkbox"/> Electronic Transfer Payment	<input checked="" type="checkbox"/> NSF Check	<input checked="" type="checkbox"/> Insurance Adjustment
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	<input checked="" type="checkbox"/> Sales Tax	<input type="checkbox"/> Senior Citizen Courtesy
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	<input checked="" type="checkbox"/> Credit Card Refund	<input checked="" type="checkbox"/> Write-off
	<input checked="" type="checkbox"/> Credit Card Void	<input checked="" type="checkbox"/> Offsetting Adjustment
		<input checked="" type="checkbox"/> Discount




Production Totals and Trends

Introduction

Dentrix Ascend has reports to help you evaluate your production totals and trends in your practice.

We recommend these reports:

- Production Trends – Chart Report.
- Production Summary – HSPA Report.

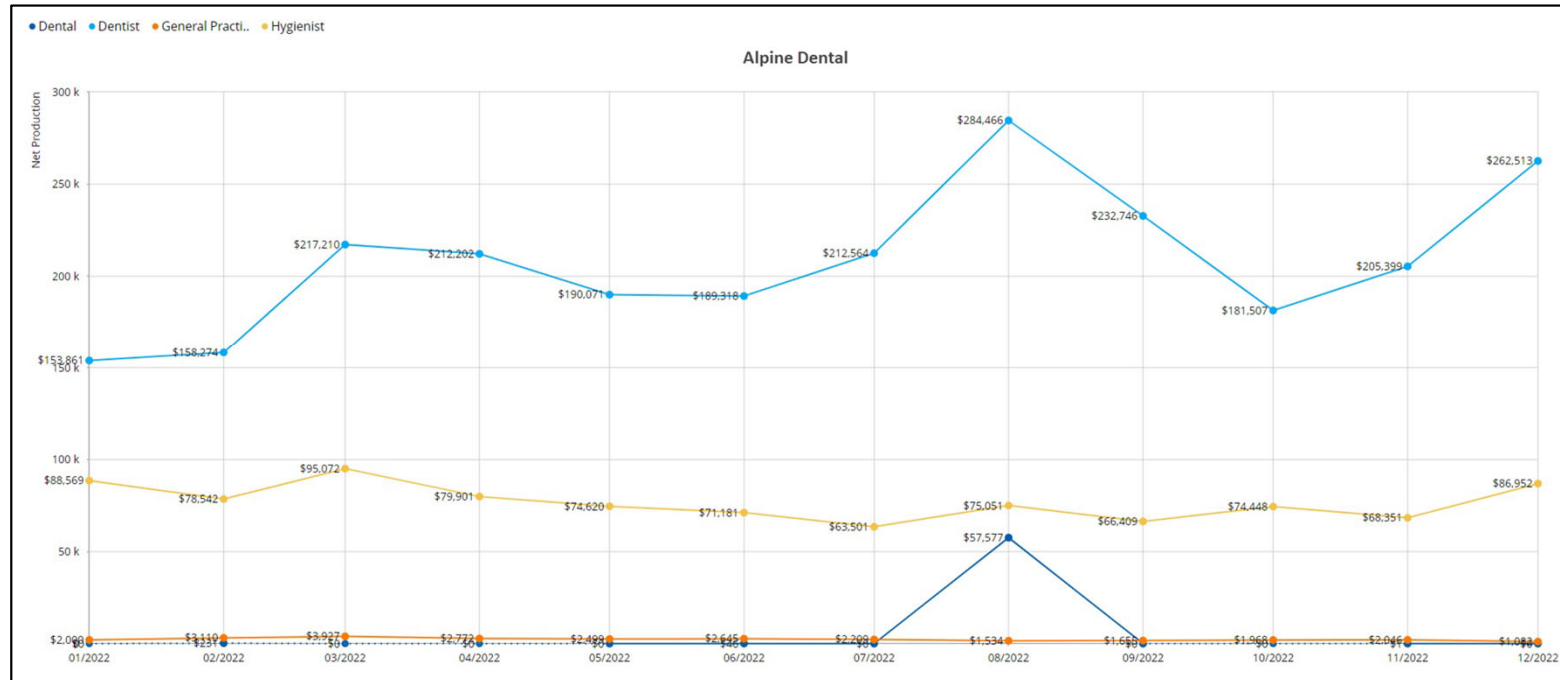


Where am I at with my production?

A large, dark blue thought bubble with a white question inside. The bubble is connected to two smaller, solid blue circles below it, suggesting a thought process or a question being asked.

Production Trends – Chart Report

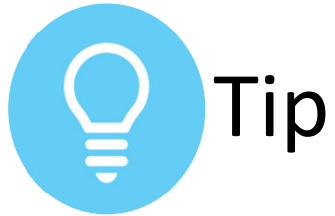
The Production Trends – Chart Report helps you evaluate production trends over the past 12 months.



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The Production Trends - Chart Report

[The Production Trends – Chart Report Video](#)



Tip

Setting Up the Provider's Specialty

Setting up a provider's specialty will get you the best views in the Production Trends report.

1. On the provider's User Account Information page, click the **Provider Info** tab.
2. Click the Specialty down arrow and select the provider's specialty.
3. Click **Save**.

Adam Jones - User Account Information

Basic Info | User Roles & Locations | **Provider Info** | Fees | Working Hours

Main Information

Short Name * ⓘ Title

DDS3

Specialty

Hygienist
Dentist
Dental
Dental Public Health
Dental Specialty
Denturist
Endodontics
Federally Qualified Health Center
General Practice
Hygienist
Multi-Specialty

Provider appointment color *

Blue

City * State * ZIP Code *

Melbourne FL 32940-1234



Tip

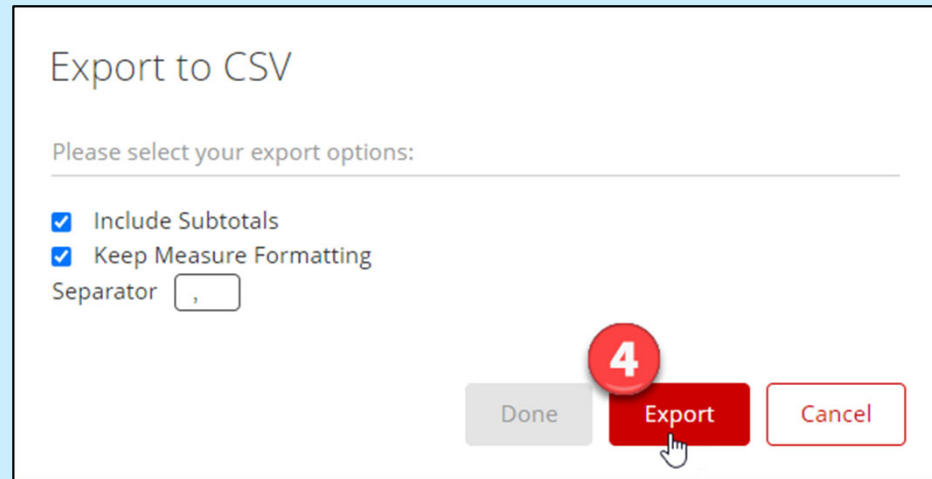
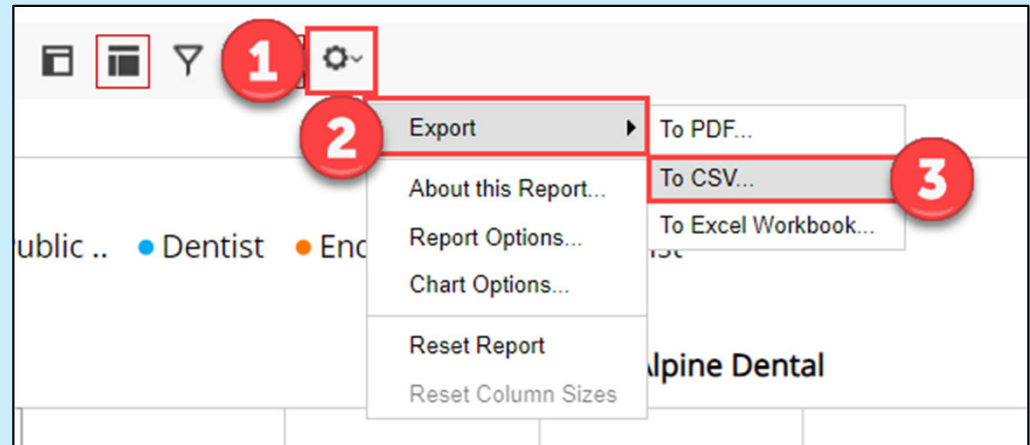
Exporting Analysis Power Reports

You can export analysis reports to various file formats (PDF, CSV or Excel Workbook).

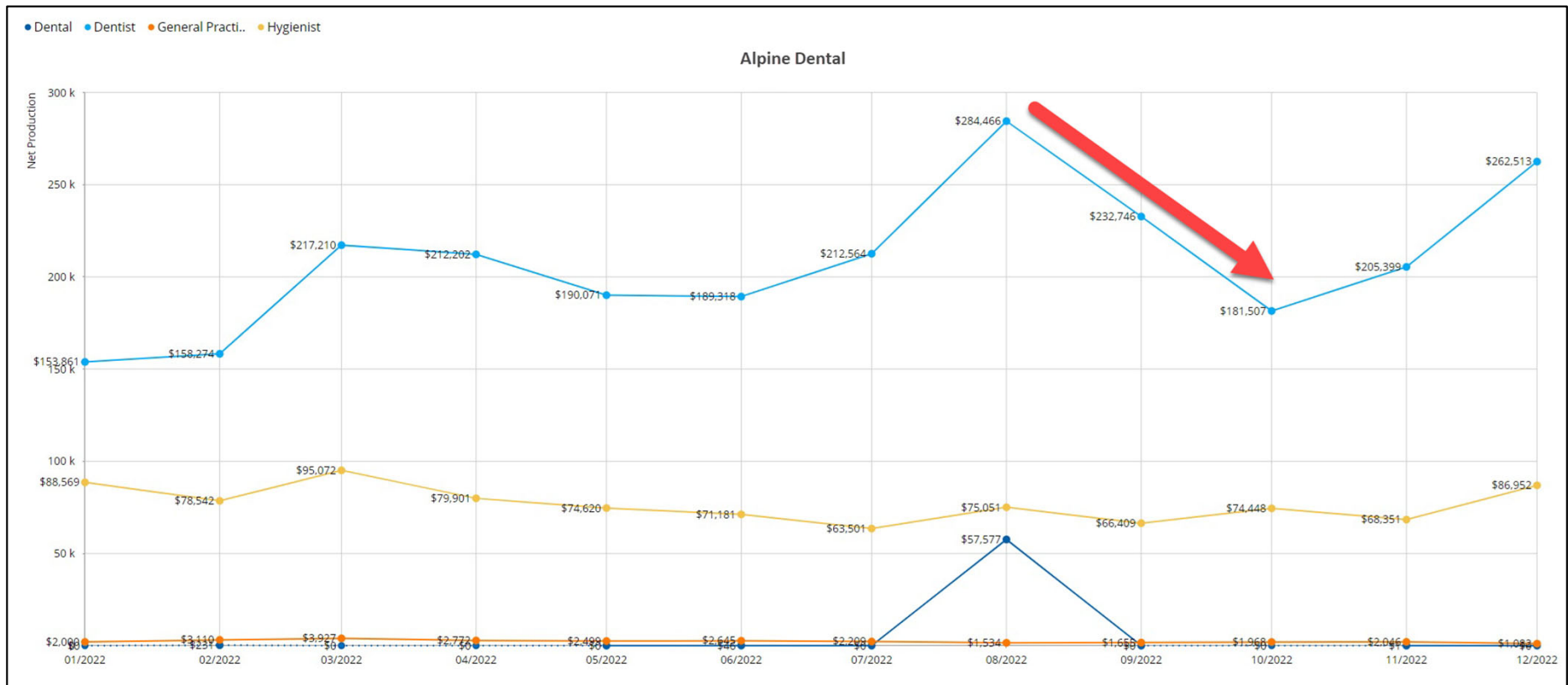
1. Click the **More Actions** icon.
2. Click **Export**.
3. Select CSV or To Excel Workbook.

Follow the prompts for your preferred format.

4. Click **Export**.



Analyzing the Production Trends – Chart Report



What You Can Do to Improve Production

- Build relationships with patients.
- Take time to explain treatment plans to patients and why treatment is important.
- Invest in imaging technology that identifies caries and conditions.
- Use online booking for recare appointments.
- If staff shortages, hire temp staff from a staffing agency.
- Get a website and invest in your online presence.
- Train your staff to provide a wonderful patient experience.



The Production Summary – HSPA Report



The Production Summary – HSPA Report helps you evaluate your production for completed procedures from the previous 12 months.



Benefits of the Production Summary – HSPA Report



Helps you evaluate the type of dentistry you are doing.



Helps you evaluate what you are referring out of the practice.



Helps you evaluate your prophylaxis and periodontal charges.



Helps you evaluate your investment in dental technology.

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The Production Summary -
HSPA Report: Part 1

[The Production Summary – HSPA Report Part 1 Video](#)

Analyzing the Production Summary – HSPA Report



You should look at your overall procedure production from highest to lowest to help you see your most productive procedures.

Proc. Code	Charges	Procedure Count	Average
D0230	\$4,359,645.00	117,703	\$37.04
D2740	\$3,700,869.82	2,977	\$1,243.15
D0274	\$1,907,188.00	22,245	\$85.74
D1110	\$1,854,071.57	15,145	\$122.42
D7210	\$1,690,189.46	5,449	\$310.18
D0330	\$1,562,999.00	11,237	\$139.09
D2392	\$1,310,285.49	4,572	\$286.59
D0220	\$1,251,188.60	33,962	\$36.84
D1206	\$1,083,587.14	19,397	\$55.86
D3330	\$1,073,223.60	872	\$1,230.76
D0120	\$983,864.00	13,333	\$73.79
D0150	\$828,649.07	10,463	\$79.20
D3221	\$741,482.00	1,773	\$418.21
D2393	\$625,450.20	1,793	\$348.83
D2391	\$568,360.95	2,537	\$224.03
D7953	\$535,501.00	1,106	\$484.18
D3320	\$489,523.90	481	\$1,017.72
D1120	\$460,515.00	5,264	\$87.48
D2954	\$451,028.23	1,325	\$340.40
D3310	\$444,512.45	489	\$909.02
D7250	\$441,728.00	1,304	\$338.75
D4341	\$438,266.00	1,595	\$274.77
D2950	\$414,016.79	1,596	\$259.41
D5130	\$409,885.83	226	\$1,813.65
D1351	\$343,868.38	4,786	\$71.85
D6010	\$309,859.55	168	\$1,844.40
D5140	\$303,544.00	166	\$1,828.58
D5110	\$250,885.44	140	\$1,792.04
D5211	\$222,547.00	151	\$1,473.82

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The Production Summary - HSPA Report: Part 2

[The Production Summary – HSPA Report Part 2 Video](#)



RECAP

Production Totals and Trends

Production Trends – Chart Report	<ul style="list-style-type: none">• Helps you evaluate production trends over the past 12 months.
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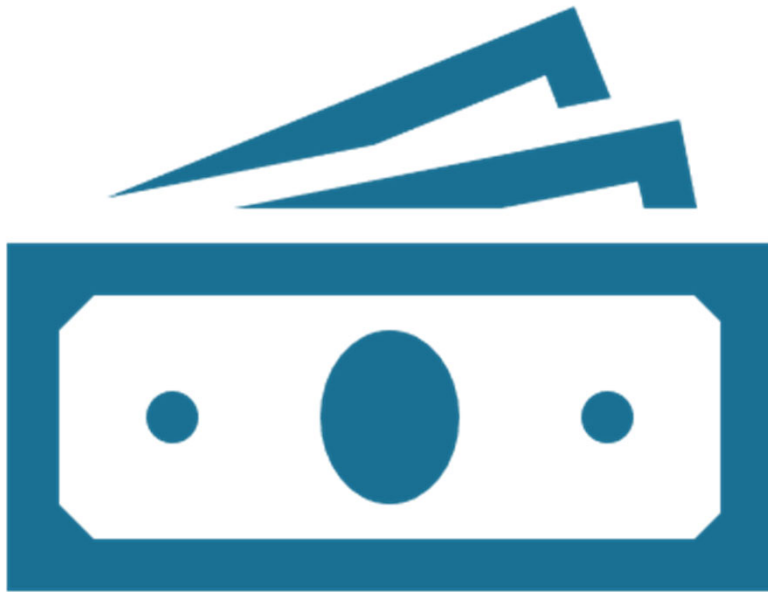
If you have questions, submit them in the question box.

Where to Get Help

Articles

- [Production Trends - Chart Report](#)
- [Production Summary Report](#)
- [Exporting a Power Report](#)
- [Provider Production Report](#)
- [Common Adjustments & How to Use Each One](#)





**Collection
Success**

Introduction

Dentrix Ascend has reports to help you evaluate how much your practice is collecting based on your production. We recommend these reports:

- Collection Success Report
- Insurance Utilization Report



How much of my production am I actually collecting?

Collection Success Report

The Collection Success report helps you evaluate how you are doing on the success of your collections.

Location	Year (Service)	Month (Service)	Production	Collection	Collection Success
Alpine Dental	2022	Jan	\$194,332.98	-\$184,274.57	95%
		Feb	\$159,892.79	-\$150,784.12	94%
		Mar	\$190,197.96	-\$181,281.56	95%
		Apr	\$235,720.92	-\$215,109.40	91%
		May	\$202,551.37	-\$187,554.80	93%
		Jun	\$213,157.53	-\$191,259.69	90%
		Jul	\$176,794.57	-\$165,327.93	94%
		Aug	\$239,717.92	-\$223,709.96	93%
		Sep	\$181,628.55	-\$165,220.97	91%
		Oct	\$177,150.98	-\$142,704.09	81%
		Nov	\$142,338.62	-\$109,955.00	77%
		Dec	\$209,247.63	-\$69,278.38	33%
Alpine Dental Total			\$2,370,130.47	-\$1,992,819.87	84%
Cottonwood Dental	2022	Jan	\$159,134.73	-\$151,614.53	95%
		Feb	\$129,090.11	-\$126,284.21	98%
		Mar	\$172,505.76	-\$162,957.46	94%
		Apr	\$181,440.86	-\$173,339.89	96%
		May	\$162,904.76	-\$152,157.51	93%
		Jun	\$166,051.90	-\$151,117.57	91%
		Jul	\$127,811.68	-\$121,431.93	95%
		Aug	\$152,094.31	-\$141,388.53	93%
		Sep	\$114,834.50	-\$98,018.25	85%
		Oct	\$124,808.22	-\$107,619.85	86%
		Nov	\$125,802.74	-\$86,966.83	69%
		Dec	\$203,815.52	-\$56,855.34	28%
Cottonwood Dental Total			\$1,869,534.63	-\$1,536,818.00	82%

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The Collection Success Report

[The Collection Success Report](#)



Tip

Using the Auto-Refresh Icon

Use auto-refresh so you don't have to repeatedly refresh the page.

1. Click the **auto-refresh** icon before you make changes to the report.
2. Make the changes to the report.

The report automatically refreshes.

The screenshot shows a report interface with a toolbar at the top containing icons for back, forward, full screen, filters, auto-refresh, and settings. A large red arrow points to the auto-refresh icon. Below the toolbar, there are four filters: 'Month (First Visit) includes previous 12 Month (First Visit)', 'Provider excludes n/a', 'On First Visit includes True', and 'Location includes Alpine Dental LLC'. A red notification bar states 'Report definition has been modified.' On the right side of this bar, there is a 'Refresh Report' button, which is circled in red with a diagonal slash through it, indicating it should not be used. The main content area shows two columns: 'Alpine Dental LLC' and 'Cottonwood Dental Corp'.

Analyzing the Collection Success Report



You should look at the Collection Success color-coded percentages to see the relative success from month to month.

- Green is good, red is not good.

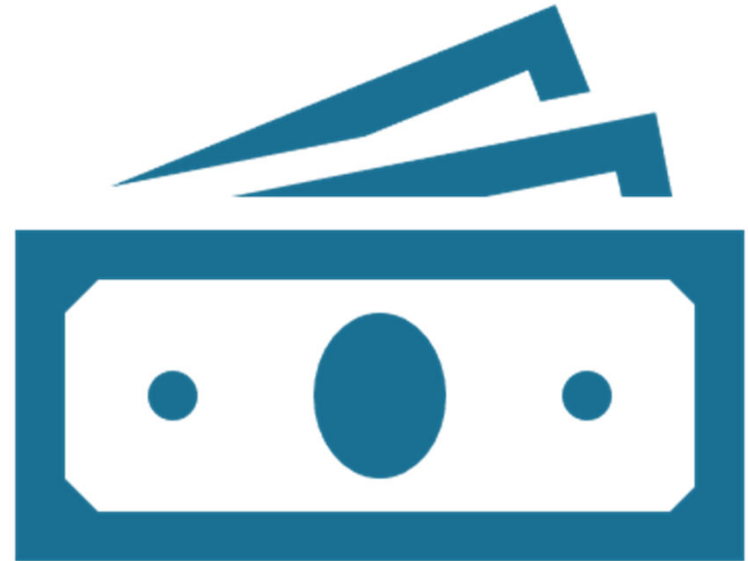
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		Dec	\$203,815.52	-\$56,855.34	28%
Cottonwood Dental Total			\$1,869,534.63	-\$1,536,818.00	82%

What Percentage Matters?

Your collections goal should be **98%**.

"The average dental practice is losing 9% of their production to uncollected revenues. This means if you are producing \$60,000 per month, you are losing an average of \$5,400 per month! That's almost \$65,000 per year of lost revenue."

DentistryIQ, Dentists: Ignoring your collections percentage is like throwing money away



Improving Your Collection Success

To improve your collection success, you should be:

- Collecting payment at the time of service.
- Dedicating a staff member to **just** patient check-out.
- Using workflow compliance in Dentrix Ascend.



Dentrix Ascend Workflow Compliance

Using workflow compliance in Dentrix Ascend will help improve your collections. It reminds you to collect payment before the patient leaves the office.

- Watch [Patient Checkout Using Exit Workflow Compliance](#) to learn more.

Wednesday, December 14, 2022

Status Tracker Schedule Peek

Patient Patient Search Operator All selected Collapse All

Checkout 1

11:00 AM 1hr (DDS2) Checkout Complete

Emilio M Abbott 03/17/1968 (54) RC-molar

Enter appointment note

Code	Description	Provider	Status
D3330	Root Canal Therapy on Molar Tooth Th: 31	DDS2	Completed

Needs Follow-Up

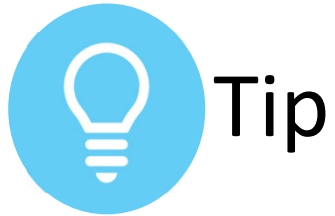
Chart Tx Planner Ledger

Appointment Tasks

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

Add Clinical Note

No clinical notes entered.



Tip

Setting Up a Discount Plan

You can set up a discount plan for patients that do not have insurance to improve your collection success.

1. From the Home menu, open the **Patient Information** page.
2. Select a **discount plan** and a **fee schedule**.
3. Click the **calendar icon** next to **Discount plan expiration** to select a date from the date picker.
4. Click **Save**.

Patient Information

Basic Info

Related Patients

Medical Alerts

Patient Forms

Preferences

Referrals

Notes

First name * Amanda M.I. Last name * Jones

Preferred name Title Suffix

Gender * Female Birthdate * 01/30/1989 Status Active

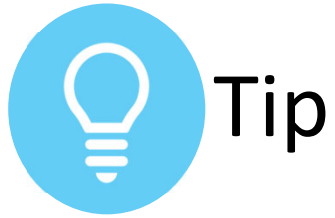
Chart # First visit 09/23/2022 Last visit 09/23/2022

Social Security # Primary provider DDS2 - Brannan Greenwell

Discount plan Basic (uninsured) Select a fee schedule * Uninsured Discount Plan

Discount plan expiration 03/03/2023

Save Cancel



Discount Plan Expiration Notifications

When you select a discount plan expiration date, notifications **automatically alert** you when a discount plan has expired or will expire soon.

Discount plan: Basic (uninsured) | Select a fee schedule *: Uninsured Discount Plan

Discount plan expiration: 03/03/2023

MARCH						
SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	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	7	8

Monday, February 27, 2023

Status Tracker | Schedule Peek

Patient Search: DOWELL -2; DOWE | Collapse All

Arriving	0
Here	0
Ready	0
Chair	0
Check	2

Warning: Discount plan will expire on 03/03/2023 and may need to be renewed soon.

8:00 AM | Complete

Samantha Rogers 11/11/1986 (35) | RC-molar, PA, LimitEx

Text messages

Enter appointment note

Code	Description	Provider	Status
------	-------------	----------	--------

Insurance Utilization Report

The Insurance Utilization report helps you evaluate the percentage of your business that is billed out to insurance and how much you collect from each carrier.



How much am I collecting from my insurance carriers?

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The Insurance Utilization Report

[The Insurance Utilization Report Video](#)

The Insurance Utilization Report displays production and collections from each insurance for the previous 12 months.

The report displays color-coded bar charts:

- Patient Count (purple)
- Net Production (purple)
- % Write-off (green to red)
- Average Write-off (green to red)

Claim Carrier	Patient Count	Procedure Charges	Total Write-off	Net Production	% Write-off	Average Write-off	Collection
Aetna	499	\$685,584.55	-\$244,589.92	\$440,994.63	-35.7%	\$490.16	-\$262,388.47
Aetna PPO	110	\$170,871.00	-\$66,118.81	\$104,752.19	-38.7%	\$601.08	-\$59,842.45
Alignment Health Plan	1	\$475.00	\$0.00	\$475.00	0.0%	\$0.00	-
Always Care Benefits	1	\$560.00	-\$2.00	\$558.00	-0.4%	\$2.00	-
Ameriben Solutions	1	\$977.00	\$0.00	\$977.00	0.0%	\$0.00	-\$865.00
Ameritas Life Insurance Corp	71	\$116,463.00	-\$43,084.57	\$73,378.63	-37.0%	\$606.82	-\$29,883.26
Anthem BC MN	43	\$61,013.00	-\$24,285.63	\$36,727.37	-39.8%	\$564.78	-\$13,980.07
Anthem Blue Cross CA	280	\$411,014.00	-\$196,633.19	\$214,380.81	-47.8%	\$702.26	-\$93,273.25
Anthem Dental Complete- Scripps	136	\$235,886.00	-\$114,587.75	\$121,298.25	-48.6%	\$842.56	-\$58,028.51
BCBS FED (MEDICAL)	30	\$48,497.00	-\$6,461.98	\$42,035.02	-13.3%	\$215.40	-\$1,955.50
BEAM Insurance Administrators	27	\$37,751.00	-\$10,362.87	\$27,388.03	-27.5%	\$383.81	-\$13,151.07
BERKSHIRE HATHAWAY	1	\$8,894.00	\$0.00	\$8,894.00	0.0%	\$0.00	-
BLUE SHIELD OF CALIFORNIA	40	\$47,089.60	-\$9,843.60	\$37,246.00	-20.9%	\$246.09	-\$14,013.80
BLUECROSS BLUESHIELD Of Arka...	1	\$1,328.00	-\$973.74	\$354.26	-73.3%	\$973.74	-\$268.55
Benefit Coordinators Corporation	1	\$527.00	\$0.00	\$527.00	0.0%	\$0.00	-
Benefit Coordinators Corporation ...	1	\$848.00	-\$269.00	\$579.00	-31.7%	\$269.00	-\$235.00
Best Life & Health Insurance Co. (...)	1	\$705.00	-\$84.72	\$620.28	-12.0%	\$84.72	-\$116.28
Blue Cross Blue Shield Association...	10	\$10,817.00	-\$5,648.00	\$5,169.00	-52.2%	\$564.80	-\$2,004.10
Blue Cross Blue Shield of Arizona	5	\$5,914.00	-\$1,809.34	\$4,104.66	-30.6%	\$361.87	-\$1,395.66
Blue Cross Blue Shield of Illinois	25	\$29,176.00	-\$13,070.72	\$16,105.28	-44.8%	\$522.83	-\$9,506.82
Blue Cross Blue Shield of Massach...	25	\$35,046.00	-\$15,271.26	\$19,774.74	-43.6%	\$610.85	-\$8,347.04
Blue Cross Blue Shield of Michiga...	3	\$2,045.00	\$267.31	\$2,312.31	13.1%	-\$89.10	-\$1,133.37
Blue Cross Blue Shield of Montana	1	\$1,984.00	-\$811.89	\$1,172.11	-40.9%	\$811.89	-\$687.37
Blue Cross Blue Shield of North C...	1	\$8,166.00	-\$2,531.43	\$5,634.57	-31.0%	\$2,531.43	-\$1,500.00
Blue Cross Blue Shield of Oregon	2	\$5,686.00	-\$594.00	\$5,092.00	-10.4%	\$297.00	-\$1,000.00

Analyzing the Insurance Utilization Report



Look at the color-codes for the % Write-off and Average Write-off percentages to help you see the relative amount of the write-off for each carrier.

- Green is good, red is not good.
- Red color-codes means that **you are writing off too much** with that insurance carrier.

Claim Carrier	Patient Count	Procedure Charges	Total Write-off	Net Production	% Write-off	Average Write-off	Collection
Aetna	499	\$685,584.55	-\$244,589.92	\$440,994.63	-35.7%	\$490.16	-\$262,388.47
Aetna PPO	110	\$170,871.00	-\$66,118.81	\$104,752.19	-38.7%	\$601.08	-\$59,842.45
Alignment Health Plan	1	\$475.00	\$0.00	\$475.00	0.0%	\$0.00	-
Always Care Benefits	1	\$560.00	-\$2.00	\$558.00	-0.4%	\$2.00	-
Ameriben Solutions	1	\$977.00	\$0.00	\$977.00	0.0%	\$0.00	-\$865.00
Ameritas Life Insurance Corp	71	\$116,463.00	-\$43,084.37	\$73,378.63	-37.0%	\$606.82	-\$29,883.26
Anthem BC MN	43	\$61,013.00	-\$24,285.63	\$36,727.37	-39.8%	\$564.78	-\$13,980.07
Anthem Blue Cross CA	280	\$411,014.00	-\$196,633.19	\$214,380.81	-47.8%	\$702.26	-\$93,273.25
Anthem Dental Complete- Scripps	136	\$235,886.00	-\$114,587.75	\$121,298.25	-48.6%	\$842.56	-\$58,028.51
BCBS FED (MEDICAL)	30	\$48,497.00	-\$6,461.98	\$42,035.02	-13.3%	\$215.40	-\$1,955.50
BEAM Insurance Administrators	27	\$37,751.00	-\$10,362.97	\$27,388.03	-27.5%	\$383.81	-\$13,151.07
BERKSHIRE HATHAWAY	1	\$8,894.00	\$0.00	\$8,894.00	0.0%	\$0.00	-
BLUE SHIELD OF CALIFORNIA	40	\$47,089.60	-\$9,843.60	\$37,246.00	-20.9%	\$246.09	-\$14,013.80
BLUECROSS BLUESHIELD Of Arka...	1	\$1,328.00	-\$973.74	\$354.26	-73.3%	\$973.74	-\$268.55
Benefit Coordinators Corporation	1	\$527.00	\$0.00	\$527.00	0.0%	\$0.00	-
Benefit Coordinators Corporation ...	1	\$848.00	-\$269.00	\$579.00	-31.7%	\$269.00	-\$235.00
Best Life & Health Insurance Co. (...)	1	\$705.00	-\$84.72	\$620.28	-12.0%	\$84.72	-\$116.28
Blue Cross Blue Shield Association...	10	\$10,817.00	-\$5,648.00	\$5,169.00	-52.2%	\$564.80	-\$2,004.10
Blue Cross Blue Shield of Arizona	5	\$5,914.00	-\$1,809.34	\$4,104.66	-30.6%	\$361.87	-\$1,395.66
Blue Cross Blue Shield of Illinois	25	\$29,176.00	-\$13,070.72	\$16,105.28	-44.8%	\$522.83	-\$9,506.82
Blue Cross Blue Shield of Massach...	25	\$35,046.00	-\$15,271.26	\$19,774.74	-43.6%	\$610.85	-\$8,347.04
Blue Cross Blue Shield of Michiga...	3	\$2,045.00	\$267.31	\$2,312.31	13.1%	-\$89.10	-\$1,133.37
Blue Cross Blue Shield of Montana	1	\$1,984.00	-\$811.89	\$1,172.11	-40.9%	\$811.89	-\$687.37
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Suggestions:

- Try renegotiating your contracted fee schedule to reduce the write-off amounts.
- Consider dropping the insurance carrier to reduce write-off amounts.
- Utilize Unitas for fee negotiations.





RECAP

Collection Success

Collection Success Report	<ul style="list-style-type: none">• Helps you see how you are doing on the success of your collections.
Insurance Utilization Report	<ul style="list-style-type: none">• Helps you see the percentage that is billed out to insurance and how much you collect from each carrier.



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

Where to Get Help

Videos

- [Patient Checkout Using Exit Workflow Compliance](#)

Articles

- [Understanding the Financial Reports](#)
- [Collection Success Report](#)
- [Configuring Discount Plan Expiration Notifications](#)
- [Insurance Utilization Report](#)

Webinar

- [Implement A More Profitable Patient Visit Workflow with the Dentrix Ascend Routing Panel](#)





**Practice
Growth**

Introduction



Dentrix Ascend has reports to help you evaluate your practice growth. We recommend these reports:

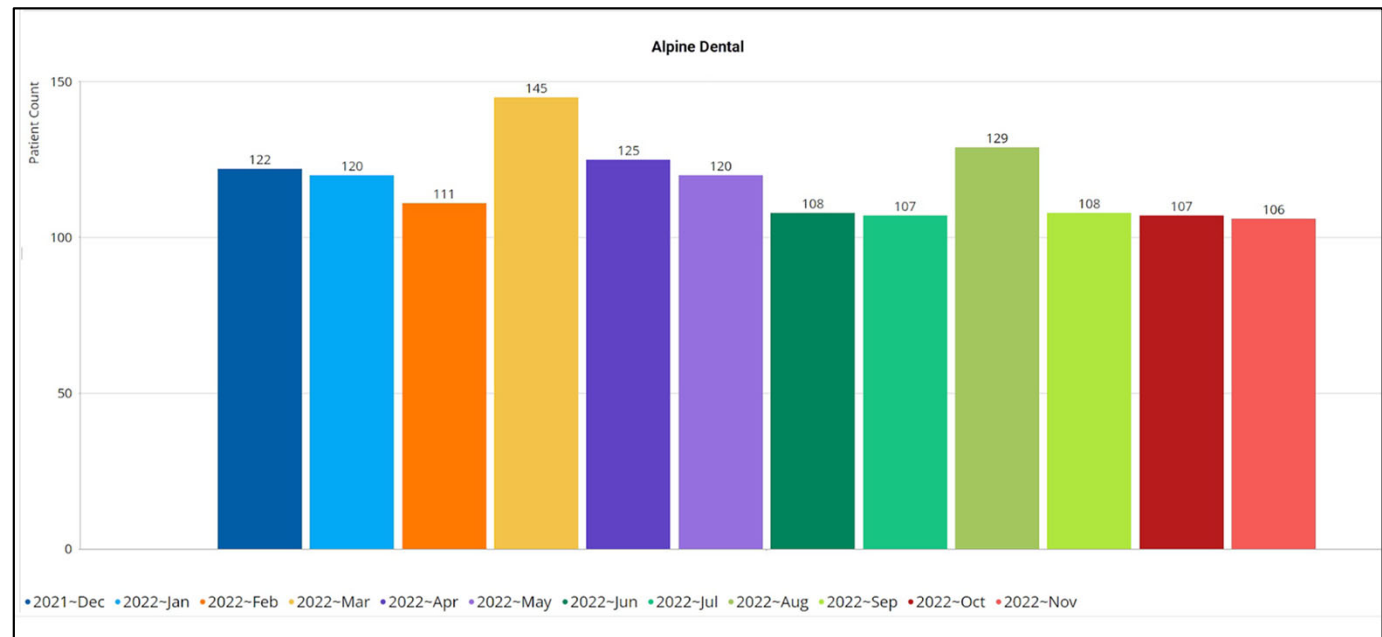
- New Patients by Month – Chart Report
- Active Patients in Recare Report

A large, dark blue thought bubble with a white question mark inside. Below the main bubble are two smaller, solid dark blue circles of decreasing size, arranged in a vertical line to the left, suggesting a thought process or a question.

Has my practice grown?

New Patients by Month – Chart Report

The New Patients by Month – Chart Report helps you evaluate how many new patients have joined your practice.



DENTRIXASCEND

New Patients by Month - Chart

[New Patients by Month – Chart Video](#)

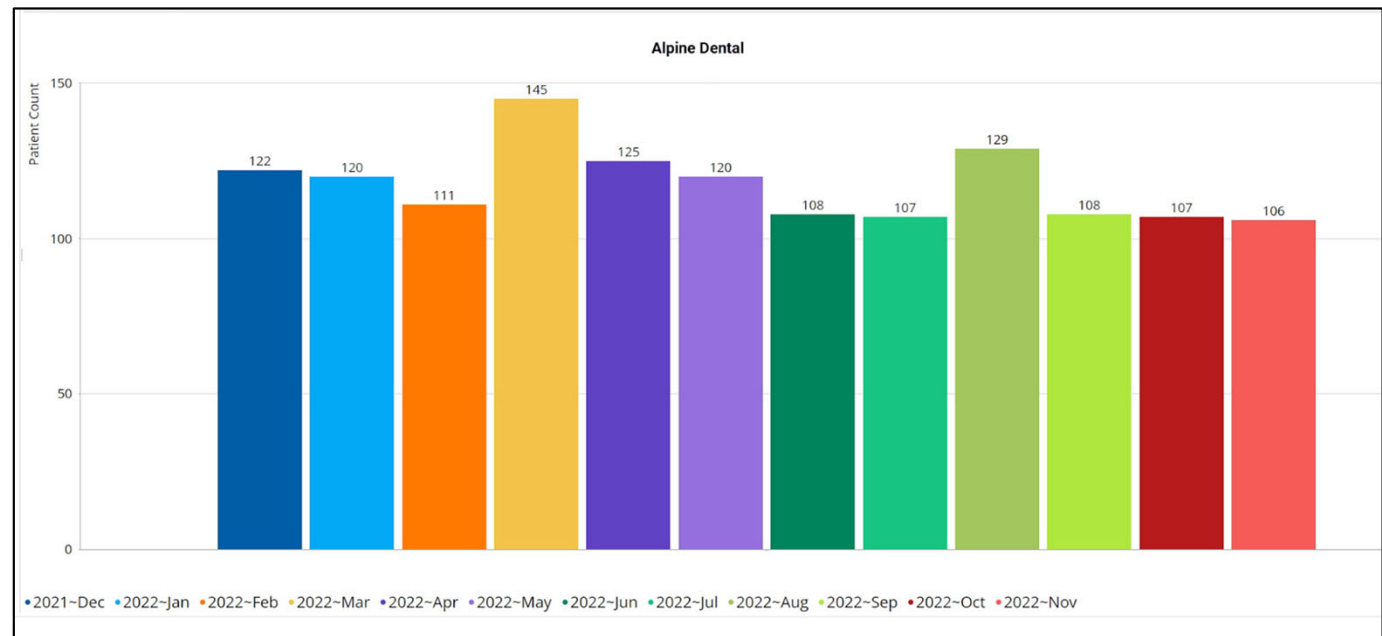
Analyzing the New Patients by Month – Chart Report



You should look at new patient growth per location.

Industry Standard Benchmark:

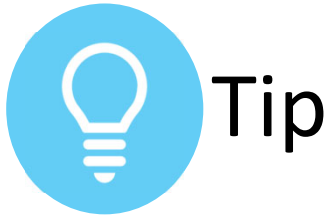
For a practice with one doctor and two hygienists, you should have **20 to 25 new patients per month.**



If your new patient numbers are low, you should evaluate your practice from a patient's perspective:

- Is our practice staff friendly, warm, and inviting?
- Are we available for working patients?
- Do we offer the latest technologies?
- Do we ask our patients to refer others? If we do, do we send thank you letters?
- Are we marketing and networking with other offices to invite new patients to our practice?





Tip

Counting New Patients


All patients are **New** and change to **Active** when you post a procedure in the Routing Panel or the Ledger.



Note: You can see the patient's status on the Patient Information page.

Checkout 2

7:00 AM 1hr 30min (DDS2) Checkout Complete

 **Jenny Baker**
03/21/1986 (36)
[Text messages](#)

Crown #3, Crown #4
CrmPoCm, CrmPoCm

Collect insurance deductible. ~BSL

Code	Description	Provider	Status
D2740	Full Porcelain/Ceramic Crown	DDS2	Post
D2740	Full Porcelain/Ceramic Crown	DDS2	Post

Needs Follow-Up **Complete All**

Chart Tx Planner Ledger

Appointment Tasks

Gender * Female Birthdate * 03/21/1986 Status **Active**

Chart # JB3742B First visit 12/14/2022 Last visit 12/14/2022

Active Patients in Recare Report



The Active Patients in Recare Report helps you see how many active patients are in recare.

Power Reporting > Active Patients in Recare ★

< > | 📄 📊 ⚙️ | ⚡ ⚙️

> 3 Filters

Location	Patients Seen	Active w/ Recare	% in Recare	Perio Patients	% in Perio
Alpine Dental	4,854	3,314	68%	114	2%
Tabiona Dental	3,908	3,036	78%	62	2%
Cottonwood Dental	1,857	1,277	69%	28	2%
Jordan Dental	1,846	1,427	77%	98	5%
Kearns Dental	7,428	5,384	72%	50	1%
Lindon Dental	1,283	952	74%	22	2%
Taylorsville Dental	6,840	5,340	78%	79	1%
Grand Total	27,094	20,459	76%	452	2%

DENTRIXASCEND

Active Patients in Recare

[Active Patients in Recare Report Video](#)

Analyzing the Active Patients in Recare Report: Recare Patients



First look at % of Patients in Recare.

- The % in Recare tells you the percentage of patients you are retaining in your practice. **The goal is 90%.**

Patient retention = the percentage of active patients who consistently return for recare visits within a specified period.

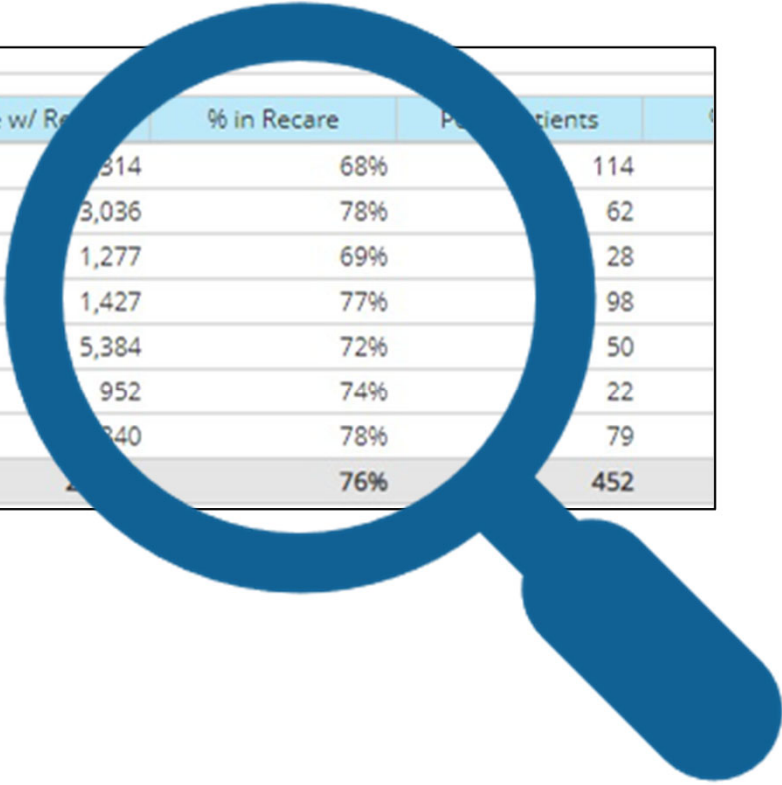
Power Reporting > Active Patients in Recare ★

< 3 Filters

Location	Patients Seen	Active w/ Recare	% in Recare	Perio Patients	% in Perio
Alpine Dental	4,854	3,314	68%	114	2%
Tabiona Dental	3,908	3,036	78%	62	2%
Cottonwood Dental	1,857	1,277	69%	28	2%
Jordan Dental	1,846	1,427	77%	98	5%
Kearns Dental	7,428	5,384	72%	50	1%
Lindon Dental	1,283	952	74%	22	2%
Taylorsville Dental	6,840	5,340	78%	79	1%
Grand Total	27,094	20,459	76%	452	2%

If the % in Recare is **lower than 90%**, find out:

- If you are scheduling:
 - The patient's next recare before they leave the office.
 - New patients that have come in for a limited exam with a follow-up appointment for a comprehensive exam.
- Why new patients are not returning.



	Active w/ Recare	% in Recare	New Patients	%
4	314	68%	114	
8	3,036	78%	62	
7	1,277	69%	28	
5	1,427	77%	98	
8	5,384	72%	50	
8	952	74%	22	
0	240	78%	79	
4		76%	452	

Analyzing the Active Patients in Recare Report: Perio Patients

Next look at **% of Patients in Perio**.

- The **% in Perio** tells you the percentage of patients that are in perio treatment.

Power Reporting > Active Patients in Recare ★

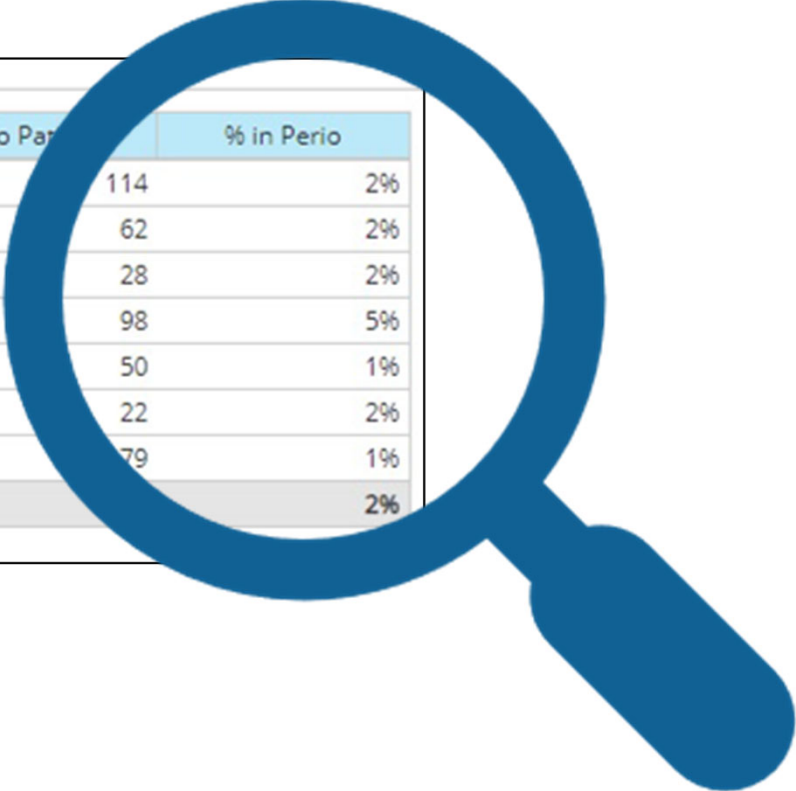
< 3 Filters

Location	Patients Seen	Active w/ Recare	% in Recare	Perio Patients	% in Perio
Alpine Dental	4,854	3,314	68%	114	2%
Tabiona Dental	3,908	3,036	78%	62	2%
Cottonwood Dental	1,857	1,277	69%	28	2%
Jordan Dental	1,846	1,427	77%	98	5%
Kearns Dental	7,428	5,384	72%	50	1%
Lindon Dental	1,283	952	74%	22	2%
Taylorsville Dental	6,840	5,340	78%	79	1%
Grand Total	27,094	20,459	76%	452	2%

Note: 25% should be the average for an office with one doctor and two hygienists.

If the % in Perio is **lower than 25%**, find out:

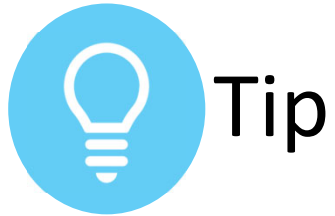
- If you are actively doing periodontal exams for all patients annually.
- This does not include just spot probing.



% in Recare	Perio Pat	% in Perio
68%	114	2%
78%	62	2%
69%	28	2%
77%	98	5%
72%	50	1%
74%	22	2%
78%	79	1%
76%		2%



Note: Your numbers will not be accurate if you code perio service as a prophy for the sake of insurance.



Using the Procedure Search Bar to Attach Recare

Typing “Recare” or an ADA code in the Procedure Search Bar provides a quick way to attach recare codes.

- Attaches as Recare.
- These codes are generated in reports.

Typing “Recare” in the Other field is an internal note only.

- **This does not generate in reports.**

DeShawn Davis
09/08/1989 (33 years old)

Chart Ledger Tx Planner

Appt Contact Info Rel. Appts Med. Alerts Lab Case

Status
Here Schedule

ASAP Needs Follow-Up Premedicate Pinned

Procedure(s) 0 selected * Other

Recare

ALL PROCEDURES	CODE	DESCRIPTION
Re Adult	Re Ad...	Recare - Prophy, Adult
Re Child	Re Chi...	Recare - Prophy, Child
Adult Recare	9998	Dan's multi code for re...

DeShawn Davis
11:00 AM (1-Tx)
Recare
Show production

DeShawn Davis
09/08/1989 (33 years old)

Chart Ledger Tx Planner

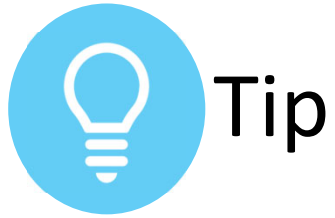
Appt Contact Info Rel. Appts Med. Alerts Lab Case

Status
Here Schedule

ASAP Needs Follow-Up Premedicate Pinned

Procedure(s) 0 selected * Other

Procedure search Recare



Tip

Using the Workflow Compliance Report

This report helps you evaluate your team's consistency in scheduling the next recare appointment.

1. On the Home menu, under Reports, click **Workflow Compliance**.



Note: The only way to populate the Workflow Compliance report is to make the routing panel part of your workflow.

Workflow Compliance Collapse All					
Information. This report includes only completed appointments (3 appointment(s) not completed).					
Summary					
Appointment Tasks	Required, #	Succeeded, #	Succeeded, %	Failed, #	Failed, %
Schedule Recare	3	1	33	2	67
Collect Phone Number	0	0	0	0	0
Collect Email	2	1	50	1	50
Collect Payment	4	2	50	2	50
Total	9	4	44	5	56



RECAP Practice Growth

New Patients by Month

- Helps you evaluate how many new patients have joined your practice.

Active Patients in Recare

- Helps you evaluate how many active patients are in recare.



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

Where to Get Help

Videos

- [Recording Patient Referrals](#)


Articles

- [New Patients by Month - Chart Report](#)
- [Active Patients in Recare Report](#)
- [Workflow Compliance Report](#)

Blogs

- [When Does a New Patient Get Counted?](#)
- [Populating the Workflow Compliance Report](#)
- [5 Easy Ways to Increase Patient Collections in Dentrix Ascend](#)





Dentrix Ascend Profitability Coaching™

Dentrix Ascend Profitability Coaching™ gives you the business advice you didn't get in dental school—expert advice tailored to your practice and your team.

Through one-on-one consulting, you learn how to leverage your Dentrix Ascend cloud-based dental software to improve your practice and your bottom line.

Testimonial

"I completely underestimated Dentrix Ascend's full potential. [Our coach] helps us with so many different aspects of the analytics, and I absolutely love it. We had the entire team watch, and our data improved with each call... Great stuff."

—Nolan Andrews DDS, Main Street Dental | El Dorado, KS



RECAP

Production, Collection, and Growth: How Did You Do Last Year?



Production Totals and Trends

- Production Trends – Chart Report
- The Production Summary – HSPA Report



Collection Success

- Collection Success Report
- Insurance Utilization Report



Practice Growth

- New Patients by Month – Chart Report
- Active Patients in Recare Report