

# Practice Success

**DENTRIX**  
ASCEND



## MOVING FROM DENTRIX TO DENTRIX ASCEND

INSIGHTS AND TIPS TO HELP YOU  
MAKE A SUCCESSFUL TRANSITION

A PRACTICE SUCCESS PLAYBOOK

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REVISED ON 10/11/23



# INTRODUCTION



## Prepare Your Team to Succeed with Dentrix Ascend

Change is never easy. It's especially hard when it affects something fundamental in your life, like your living arrangements or your career, or when it alters something you use every day, like your cell phone or your dental software.

The better prepared you are the easier change will be. We want to help you make the transition from Dentrix to Dentrix Ascend as easily as possible, so we've created this Dentrix to Dentrix Ascend transition playbook.

Each section of the book describes a major process in Dentrix Ascend, lists key differences with Dentrix, and gives you links to videos that show you what it looks like to complete essential tasks in Dentrix Ascend. Don't lose time or productivity trying to guess how to complete tasks in a new practice management system. Use the playbook to compare what you know how to do in Dentrix with the way you will do it in Dentrix Ascend so that you have a better idea of what to expect.

Start preparing today for your transition from Dentrix to Dentrix Ascend. You'll be better prepared for your initial training, and you'll be ready to hit the ground running the day you go live with Dentrix Ascend.



A note for practice owners, office managers, and other team supervisors:

This playbook is divided into sections that describe different processes in Dentrix Ascend. Your team members may not need to study every section.

In order to make it easier for your team members to study the playbook, assign team members to study individual sections of the playbook according to the tasks they will complete in Dentrix Ascend. Then ask team members to share what they have learned with the rest of the team so everyone will have a broader and better understanding of Dentrix Ascend.

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# DENTRIX ASCEND OVERVIEW



## Introduction to Dentrix Ascend

Dentrix Ascend is a cloud-based software program. You are used to logging into a computer and using a copy of Dentrix that is installed on that computer, but with Dentrix Ascend there are no files installed on the computer. You can access Dentrix Ascend from any computer, tablet, phone, or other device with internet access. Also, updates and improvements become available automatically in Dentrix Ascend as they are released.

Dentrix Ascend is not just Dentrix in the cloud. It has a smarter, more natural interface and includes built-in task automation and role-based workflows that display the day's customized to-do list and status of each task. Dentrix Ascend also includes a custom report module called Power Reports that you can use to gather the key performance data you need. And, if you have multiple locations, you can use Dentrix Ascend to access the same patient records in multiple locations without additional networking.



Dentrix Ascend is cloud-based, which means you can access it from any computer, tablet, phone, or other device with internet access. You don't have to be in the office to access Dentrix Ascend.



[Click here to watch the Dentrix Ascend Overview video \(04:52 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
Program files are installed on your server and other computers in your physical office.	The program interface and files are stored in the cloud and can be accessed from anywhere at any time.
Must be run on networked Windows PCs using a local database.	The database is in the cloud and not limited to one local database; you can access records in multiple locations without additional networking.
Requires a local data backup system that is configured and managed by an IT professional.	Data is automatically backed up in the cloud.
Online booking, digital forms, automated appointment reminders, and electronic billing statements are available but require an additional subscription fee.	Online booking, digital forms, email and text message appointment reminders, and electronic billing statements are built into the program.

# PATIENT RECORDS




## Introduction to Patient Records in Dentrix Ascend

Like Dentrix, Dentrix Ascend allows you to track patient information like demographics, contact information, insurance, referrals, medical alerts, and so forth. In Dentrix Ascend, each patient has his or her own patient overview page that contains this information.

 [Click here to watch the Patient Information Overview video \(02:02 minutes\).](#)

Unlike Dentrix, Dentrix Ascend does not group patients into families. Each patient’s page is an independent record in the database. You can create new patient records as a household, meaning a group of patients who share an address, but there is no patient who is set as the head of house for that group of patients. Instead, you assign someone to act as another patient’s primary contact or primary guarantor. You can see which patients are connected to each other by looking at the list of patients who have the same contact or guarantor, and when family relationships change, you can just update the patient’s contact or guarantor instead of splitting the family record.

 [Click here to watch the Understanding Relationships in Dentrix Ascend video \(04:44 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
Patient records are managed in the Family File module.	Patient records are stored in individual patient pages that are accessible while you are working in any area of Dentrix Ascend.
Patients are grouped into families.	Patient records are managed individually and are not grouped into families.
One person in the family is designated as the guarantor for everyone else in that family record.	Anyone in the database can be assigned as the guarantor for any other patient.
The head of house is the primary contact for everyone in the family.	Anyone in the database can be assigned as the primary contact for any other patient.
The insurance subscriber must be part of a patient’s family.	Anyone in the database can be assigned as the insurance subscriber for any other patient.



Dentrix Ascend does not have a patient module like the Family File in Dentrix. You can access a patient’s page using the patient search field in the main toolbar. You don’t have to open a separate module to view a patient’s information.



Key Differences (continued)

DENTRIX	DENTRIX ASCEND
The family list in the Family File shows all patients associated with this guarantor.	You can view a list to see who is linked to each patient financially or as a primary contact.
When you need to split family records, you have to edit family relations and move patients to a new family account, which can be a complicated process and requires extra work to close claims and clean up family balances.	When family relationships change, you can just change a patient’s primary contact and guarantor to reflect the new situation without having to make changes to claims or balances.
Some patients may have duplicate records (like when the person is a patient on their own family account and the subscriber for someone in another family account).	Each person only needs one patient record; they can be assigned as guarantor, contact person, or subscriber for as many other patients as necessary.

Explore How to Work With Patient Records in Dentrix Ascend

Explore how to complete tasks like adding a new patient record, defining the primary contact and guarantor, managing medical alerts, and recording patient referrals.

 [Click here to explore the Patient Records Essentials tutorials.](#)

# DOCUMENT MANAGEMENT

## Introduction to Documents in Dentrix Ascend

Managing documents and forms is an important part of maintaining a complete patient record. In Dentrix Ascend, you can scan or upload documents directly into a patient's document manager. Ascend organizes documents by tags, so when you want to see a specific type of document you can filter the list by specific tags to find what you need. You can also export documents from Dentrix Ascend to your computer hard drive so you can attach them to email messages and send them to patients or other providers for referrals.

## Key Differences

DENTRIX	DENTRIX ASCEND
Documents are stored in the Document Center.	Documents are stored in the Document Manager.
Documents are organized in the Document Center by document type (category).	Documents are organized by date in the Document Manager and can be filtered by tags.
You can attach a single document to multiple patients, providers, and insurance companies.	You can only attach documents to one patient.
You can view documents by patients, providers, or insurance.	You can only view documents for the selected patient.
To add documents to a patient's file, you can scan them, upload documents that are saved on your computer, print to the Document Center, or take a screen capture of documents to add them to a patient's file.	To add documents to a patient's file, you can scan documents or upload documents that are saved on your computer to add them to a patient's file.
Documents that are scanned in batches or printed to the Document Center are stored in the Unfiled Documents window until you assign them to patients.	There is no batch scanning; you must select a patient before you add a document, and that document is added directly to the selected patient's file.



## Explore How to Work With Documents in Dentrix Ascend

Explore how to complete tasks like uploading documents to a patient's account, editing document information, and using tags to filter the document list.



[Click here to explore the Documents Essentials tutorials.](#)

# PATIENT FORMS



Patient forms are built into Dentrix Ascend. You can create forms, send them to patients, and collect patient responses using Ascend tools.

## Introduction to Forms in Dentrix Ascend

Dentrix Ascend's patient forms will help you maintain an accurate and up-to-date patient health history for your patients. You can include forms in the appointment reminders you send from Dentrix Ascend, and you can text or email any additional forms patients need to complete when they arrive at the office, which helps you avoid clipboards and create a more contactless, digital check-in process.

## Key Differences

DENTRIX	DENTRIX ASCEND
Forms are managed in the Questionnaires Module.	Forms are managed in the Patient Forms widget in the patient file and are accessible from a patient's appointment, patient file, and chart.
You must use an add-on service with Dentrix to send forms to patients or allow patients to check in on a computer or tablet .	You can send forms to patients before an appointment or allow patients to check in on a computer or tablet without an add-on service.
You can use the Questionnaires module to create custom forms.	The forms are fixed and cannot be modified; forms are available in both English and Spanish.
When patients update a form containing linked patient information fields in Dentrix, you can import the new information into the Family File from the form in the Questionnaires module.	When patients update a form, you can view a patient's form responses and see what has been changed, but you must update information in the patient's record manually.

## Explore How to Manage Forms in Dentrix Ascend

Explore how to complete tasks like working with patient forms, sending online forms to a patient, and viewing completed patient forms.



[Click here to watch the Forms Essentials videos \(part of the Documents Essentials lesson\).](#)

# SCHEDULING

## Introduction to Scheduling in Dentrix Ascend

In Dentrix Ascend, the appointment module is called the Calendar. The Dentrix Ascend Calendar has the same basic navigation tools and appointment options as the Dentrix Appointment Book. You can schedule and manage appointments, schedule events, and fill open appointment times.

You can also check patient insurance eligibility before an appointment in Dentrix Ascend, but, unlike Dentrix, it does not require an additional service or fee.

Dentrix Ascend also includes a routing panel which helps you complete tasks at every stage of a patient's appointment. When you use the routing panel for patient check-in and check-out, Dentrix Ascend will remind you to complete tasks like collecting missing contact information and taking payment while patients are in the office.



[Click here to watch the Viewing and Navigating the Calendar video \(06:08 minutes\).](#)



You can send appointment reminder email and text messages directly from Dentrix Ascend without any add-on services or fees. In the reminders, you can include a link to patient forms. And, patients can confirm right from the reminder messages.



[Click here to learn more about creating appointment communications.](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
The columns in the Appointment Book display the schedule by operatory.	You can set up the columns in the calendar to display the schedule by either operatory or provider.
The colors in the Appointment Book reflect the primary provider assigned to the appointment.	You can choose to color code appointments by provider or by type of procedure.
You can view a patient's scheduled appointments, past appointments, recare due, and unscheduled appointments in the Family Appointment List.	Patients have their own appointments page that shows scheduled appointments, past appointments, recare due, and broken/no-show appointments; you can manage appointments from that page.
You can use the Pinboard to move appointments for a patient or family from one date to another.	You can use the Pinboard to move appointments for a patient or family from one date to another, or you can drag appointments from one day to another without using the Pinboard.
When you create an appointment, you can place it on the Pinboard without actually scheduling it in the Appointment Book first.	When you create an appointment, you must schedule it on the Calendar before you can add it to the Pinboard.
You can set up views and use keyboard shortcuts to switch between views in the Appointment Book.	You can toggle between showing or hiding patient names on appointments in real time, but you cannot set up keyboard shortcuts to switch between views.



## Key Differences (continued)

DENTRIX	DENTRIX ASCEND
You can add procedures to the initial appointment reasons list and use them as a quick select for common procedures, or you can search for a procedure by name or code.	There is no initial appointment list, but you can use the search field to search by name or code to find procedures or multi-codes to add to the appointment.
When you contact patients to confirm appointments, you can make notes about the contact in the Office Journal.	There is no Office Journal you can use to make notes about contacting patients, but the Unconfirmed Appointments list includes a place to make notes about contacting patients from that list.
If patients need to cancel an appointment but are not ready to schedule, you can place them on the Wait/Will Call list so Dentrix doesn't count their appointment as a broken appointment.	There is no Wait/Will Call list, but broken and no-show appointments are tracked separately; if patients need to cancel an appointment, you can change it to a broken appointment and make notes to track why and when it was canceled.
You can use the ASAP and Unscheduled Lists to fill open time in the schedule.	The ASAP and Broken/No Show list are combined into the Fill Openings widget, and you can reschedule appointments directly from that widget.
You can close the office on a selected day and set holidays and other events.	You can create events on a per-operator or per-provider basis, but you cannot close the office in the calendar.

## Explore How to Work With Appointments in Dentrix Ascend

Explore how to complete tasks like scheduling and rescheduling appointments, viewing appointment history, filling open appointment times, scheduling an event, and setting up provider working hours.



[Click here to explore the Appointment Essentials tutorials.](#)

# RECARE

## Introduction to Recare in Dentrix Ascend

Continuing care is called recare in Dentrix Ascend, and it works the same way continuing care works in Dentrix. You can set up recare types and assign them to patients, customize patient intervals, and attach recare procedures to appointments.

It's important to keep a full recare schedule in order to keep your patients healthy and active in your practice and to diagnose treatment. Because of that, Dentrix Ascend has several ways to track patients who are due for recare. You can see this information in the recare widget on a patient's page, from the Unscheduled Recare widget on the Dentrix Ascend dashboard, or using the Recare Management report. Dentrix Ascend also allows you to set up a schedule for sending email and text reminders to patients who are due for an appointment without any add-on services or fees.

 [Click here to watch the Recare Overview video \(04:39 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
The system that tracks prophies and other routine patient care is called continuing care.	The system that tracks prophies and other routine patient care is called recare.
You can attach continuing care types and customize the intervals for individual patients in their Family File record.	Each patient has a recare widget on their page that shows their recare information, and you can use the widget to attach types and customize the intervals for that patient.
The Continuing Care module helps you find patients who are due for continuing care.	You can find patients who are due for recare using the Unscheduled Recare widget on the dashboard or the Recare Management report.
You need an add-on service in order to send email and text message reminders to patients who are due for continuing care.	You can send email and text message reminders to patients who are due for recare without an add-on service or additional fee.




You can send email and text reminders to patients who are due for recare from Dentrix Ascend without an add-on service or additional charge. You can even include a link for patients to schedule their appointment online.



[Click here to learn more about creating recare communications.](#)

## Explore How to Work With Recare in Dentrix Ascend

Explore how to complete tasks like scheduling and rescheduling appointments, personalizing recare intervals, using the patient recare widget, and using the Recare Management report.

 [Click here to explore the Recare Essentials tutorials.](#)



# CHARTING

## Introduction to Charting in Dentrix Ascend

The Dentrix Ascend Clinical Chart allows you to track existing, completed, and treatment planned work. Like Dentrix, it shows you a graphical tooth chart, progress notes, and clinical notes. Additionally, in Ascend the perio chart, treatment planner, and imaging center are all pages that are accessible through tabs on the main Chart page.

Dentrix Ascend has clinical note templates like Dentrix. When you migrate from Dentrix to Dentrix Ascend, your Dentrix clinical note templates will not transfer, but you will be able to re-create and use note templates in Dentrix Ascend.

Dentrix Ascend also gives you the Quick Exam feature, which is designed to help you chart comprehensive exams quickly from one screen, and the Clinical Decision Support feature, which helps speed up charting by displaying a quick list of the procedures you like to use for a specific diagnosis.




 [Click here to watch the Charting Pages Overview video \(04:06 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
The Patient Chart, Treatment Planner, and Perio Chart are separate modules that open in separate windows.	The tooth chart, progress notes, treatment planner, perio chart, and imaging are all pages that are accessible through tabs on the main Chart page; they are not separate modules.
You can set up custom sets of procedure buttons.	You can set up custom sets of procedure buttons, which are called Favorite Procedures and appear in the Favorite Procedures list.
Clinical notes are accessible in the Patient Chart and Perio Chart.	Clinical notes are accessible when you're viewing the chart and also when you're viewing progress notes, perio chart, treatment planner, and imaging.
Clinical notes are locked when you sign the note, and any unsigned notes are locked when you close the month. Also, you can track missing and unsigned notes in the Signature Manager.	Because there is no month end process, clinical notes are only locked when you sign the note. To help identify missing, incomplete, and unsigned notes, each provider can use the Clinical Note Tasks widget for their own notes, and office managers can use the Clinical Note Tasks Report.

## Explore How to Work With Charting in Dentrix Ascend

Explore how to complete tasks like charting procedures and conditions, managing progress notes, creating clinical notes, and documenting perio exams.

 [Click here to explore the Clinical Essentials tutorials.](#)

# TREATMENT PLANNING



## Introduction to Treatment Planning in Dentrix Ascend

Dentrix Ascend gives you the same basic treatment planning options for creating and presenting cases as Dentrix. However, Dentrix Ascend does not have the option to link cases like Dentrix does. You can still present treatment options to your patients, but you will need to create two separate, unlinked cases for those options.

With Dentrix Ascend, when patients are ready for treatment, you can schedule appointments for a treatment case right from the Treatment Planner page and see the appointment information in the treatment case. Like Dentrix, Dentrix Ascend has an Unscheduled Treatment report you can use to find patients who need to come in for treatment.

You can access any of the clinical pages, including the Treatment Planner, using the tabs at the top of each clinical page. You don't have to open the Chart to be able to access the Treatment Planner.



[Click here to watch the Treatment Planning Overview video \(03:18 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
You can access the Treatment Planner module from the Patient Chart, Ledger, and Appointment Book.	You can access the treatment planner from the tabs at the top of each clinical page; it is not a separate module.
All treatment-planned procedures are added to the default case in the Treatment Planner, and you can move them around to different cases as needed.	Treatment planned procedures appear in the Unassigned list so you know which procedures you need to organize into treatment cases, and you can create new cases from that list.
You can link cases together as alternate treatment options.	You cannot link cases together; in order to present treatment options, you need to create two separate cases.
You can customize the information on the case printout, including displaying your UCR fee and the insurance allowed amount for comparison.	You cannot customize what is displayed on the case printout; instead, Ascend shows your UCR fee and the amount you will be writing off for the patient's insurance allowed amount.
You can create consent forms for treatment and attach them to cases.	You can create consent forms for treatment and attach them to cases, and you can also create procedure-specific disclaimer messages that appear on the case printout; you can create consent forms and disclaimer messages in both English and Spanish.



Key Differences (continued)

DENTRIX	DENTRIX ASCEND
In the Appointment Book, you can see which treatment-planned procedures are attached to a case in order to schedule that treatment, but you cannot see the appointment information in the Treatment Planner.	You can schedule an appointment for a specific case directly from the Treatment Planner, and you can see the appointment information for that case in the Treatment Planner.
You can create and track predetermination claims in the Treatment Plan view of the Ledger.	You can create predetermination claims in the Treatment Planner, but there is no tracking for those types of claims and they do not appear in the Ledger.
You can assign each case one of several case statuses.	You can assign case statuses, but there are fewer status options.
You can choose to manually set a case status to complete, and when you set a case complete Dentrix will also set the procedures in that case complete.	You cannot select completed as a case status; instead, when all of the procedures in the treatment plan are complete, the case status will automatically change to complete.
You can use the Treatment Manager or the Unscheduled Treatment List to find patients with outstanding treatment.	There is no Treatment Manager, but you can customize the information you see on the Unscheduled Treatment or Treatment Tracker reports and use them to find patients with outstanding treatment.

Explore How to Work With Treatment Planning in Dentrix Ascend

Explore how to complete tasks like creating cases, updating visits and case statuses, presenting treatment plans, adding consent messages to cases, and generating the Unscheduled Treatment Report.

 [Click here to explore the Treatment Planning Essentials tutorials.](#)


# LINE-ITEM ACCOUNTING


## Introduction to Line Item Accounting in Dentrix Ascend

Dentrix Ascend uses line-item accounting, which means that procedures are recorded in the Ledger line-by-line, and when you post payments you must apply them to a specific line item. In Dentrix, you have the option to post payments to a guarantor's account in order to pay off a balance for anyone in the family. But in Dentrix Ascend, payments are allocated to pay off individual procedures on individual patient accounts, and you must post them that way.

The line-item accounting principle of applying specific transactions to specific procedures is true for patient payments, insurance payments, and adjustments. When you make adjustments, you must apply them to a specific line item in the Ledger. This makes it easier to see what was adjusted and why.

In some cases, you may receive a pre-payment for a procedure that hasn't been completed yet, so you cannot apply the payment. You can still enter the payment, but it will be added to the unapplied credits section of the Ledger. When you complete the procedure, you can then apply the payment to that procedure.

 [Click here to watch the Line-Item Accounting video \(04:10 minutes\).](#)

 Line-item accounting helps you connect transactions to specific procedures, which makes it easier to understand your production and helps you avoid special adjustments to clean up patient accounts.

## Key Differences

DENTRIX	DENTRIX ASCEND
In the Ledger, you can post payments to individual patient accounts or post them to the guarantor's account to pay off the family balance.	In the Ledger, you must select a specific procedure (or procedures) to apply the payment to and then post the payment to a specific patient's account; you cannot post payments to a guarantor's account to pay off the family balance.
You can enter an adjustment for an individual patient's account or post it to the guarantor's account to adjust the family balance.	Like payments, adjustments must be allocated to specific procedures and posted to individual patient accounts.
When a patient pre-pays for a procedure, you can post the payment to the patient or guarantor's account and let the patient carry a credit balance until the procedure is completed.	When a patient pre-pays for a procedure, you can enter the payment without applying it to a specific procedure, but it will be held in the unapplied credits for that patient and must be applied to a procedure at a later time in order for the payment be posted in the Ledger.
When you post a pre-payment to a guarantor's account, you can use that payment to pay off the balance for anyone in the family.	You can post a pre-payment to a guarantor's account and use it for anyone the guarantor is responsible for, but you must reserve the pre-payment for the specific patient who will be receiving the treatment; you cannot use the unapplied credit on one patient's account to pay off the balance on another family member's account.

# BILLING



## Introduction to the Ledger in Dentrix Ascend

Like Dentrix, the Ledger in Dentrix Ascend is the place to manage financial transactions, and each patient has their own Ledger page. Unlike in Dentrix, there is no family or guarantor account because Dentrix Ascend uses line-item accounting. (See the previous section of this document for more information.)

In Dentrix Ascend, when you click on a transaction in the Ledger it will show you how it came up with the amount. Dentrix Ascend will factor insurance exceptions into insurance estimates to help you have more accurate patient portions. And, Dentrix Ascend has a Patient Walkout feature that guides you through the process of checking a patient out to make sure you don't miss any important tasks.



The Ascend Patient Walkout feature guides you through the process of creating and sending insurance claims, entering patient payments, and generating patient statements so that you don't forget any of these important tasks during check out.



[Click here to watch the Ledger overview video \(06:13 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
In the Ledger, you can post payments/adjustments to individual patient accounts or post them to the guarantor's account to pay off the family balance.	In the Ledger, you must select a specific procedure to apply the payment/adjustment to and then post the payment to a specific patient's account; you cannot post payments to a guarantor's account to pay off the family balance.
You can customize and create new payment types and adjustment types in order to categorize them and make it easier to find specific kinds of payments and adjustments.	You cannot change the default payment or adjustments types, but you can create tags and attach those to payments/adjustments in order to categorize them.
You must close the month in order to lock transactions, advance account aging, and apply finance and late charges.	There is no month end process. Dentrix Ascend automatically locks transactions for you according to the time frame you set up. Dentrix Ascend updates account aging automatically, but you must apply late charges or finance charges manually.
You can print billing statements, but you must pay for an add-on service in order to send statements by email and allow patients to pay online or by text.	Email billing statements are built in and do not require an additional add-on service. Patients can pay their bills online if you set up a WorldPay account.

## Explore How to Manage Billing in Dentrix Ascend

Explore how to complete tasks like posting payments and adjustments, adding payment tags, and generating statements.



[Click here to explore the Billing Essentials tutorials.](#)

# INSURANCE PLAN MANAGEMENT

## Introduction to Insurance in Dentrix Ascend

In Dentrix Ascend, you can set up insurance carriers and assign them to patients like you do in Dentrix. Dentrix Ascend uses coverage tables and deductibles breakdowns that work the same way they do in Dentrix, so you will be familiar with that process.

Dentrix Ascend has an exceptions table that is factored into coverage estimates, which means you can track downgrades, procedures with an age limit, and procedures that aren't covered and see how those will affect a patient's estimated portion. This exceptions table also means you don't have to maintain a payment table to know how much insurance will pay for a specific procedure like you have to use in Dentrix.

Dentrix Ascend has several extra features that make it easier for you to manage insurance plans. When you create a new plan, Dentrix Ascend searches Henry Schein One's payer database to find that plan, which will help you avoid entering duplicate plans. And when you set up insurance fee schedules, they are attached to the plan. You don't have to change fee schedules at the patient level.

 [Click here to watch the Insurance Claims overview video \(03:16 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
You can add insurance plans to the database from a patient's account or the Office Manager.	You can add insurance carriers and plans from the Insurance page in the Home menu, which is accessible anywhere in Dentrix Ascend, or from a patient's insurance page.
You must manually enter all of the insurance carrier and plan data.	When you enter an insurance carrier, you can select the carrier name or payer ID from Henry Schein One's payer database.



Dentrix Ascend uses the exceptions table to track plan exclusions, downgrades, and age limitations and factors those into insurance coverage estimates.



[Click here to learn more about adding exceptions in coverage tables.](#)



## Key Differences (continued)

DENTRIX	DENTRIX ASCEND
If you do not search for existing plans before you enter a new plan, you may create duplicate entries for the same insurance plan.	As you are entering an insurance plan, your existing plans appear in a list so you can select a matching plan and avoid entering duplicates.
If a carrier or plan is not in Henry Schein One's supported payer database, you can manually enter the payer ID, and the clearinghouse will print and mail claims for that carrier when you submit them electronically.	If a carrier or plan is not in Henry Schein One's supported payer database, 06126 is used for the payer ID (even if you have a different payer ID for the carrier), which will tell the clearinghouse to print and mail claims for that carrier when you submit them electronically; you cannot manually enter a payer ID for a plan that is not in Henry Schein One's supported payer database.
Downgrades and other exceptions are not factored into coverage estimates; you can track how much insurance will pay in the payment table.	The exceptions table allows you to enter procedures that are not covered, downgraded, or covered with an age limit, and those exceptions are factored into insurance coverage estimates; there is no payment table to maintain.
An insurance subscriber must be entered as part of a dependent's family in Dentrix, so if a patient has their own account in Dentrix and is a subscriber for another patient on a separate account, you will need to create multiple accounts for that same person in Dentrix.	The insurance subscriber does not need to be entered as part of a dependent's family in Dentrix Ascend; each person only needs one patient record, and they can be assigned as an insurance subscriber for as many other patients as necessary.
There is no place to assign or track tertiary insurance.	You can assign primary, secondary, and tertiary insurance for patients.

## Explore How to Work With Insurance Plans in Dentrix Ascend

Explore how to complete tasks like attaching insurance to a patient and dependents, adding insurance carriers and plans, and managing coverage tables and fee schedules.



[Click here to explore the Patient Insurance Essentials tutorials.](#)



# INSURANCE CLAIM MANAGEMENT



## Introduction to Insurance Claims in Dentrix Ascend

Sending claims electronically and quickly finding and correcting claim issues are essential elements of managing insurance. In Dentrix Ascend, electronic claim submission is built into the Ledger and does not require any add-on software or additional fees.

When you are viewing the Ledger, you'll see the UCR fee instead of the contracted insurance fee, and Dentrix Ascend will automatically post PPO write-off adjustments for you. That way you can see how much you are writing off to participate in insurance plans.



[Click here to watch the Insurance Claims overview \(03:16 minutes\).](#)



You can submit electronic claims in Dentrix Ascend without any add-on software or additional fees.



[Click here to learn about sending claims in Dentrix Ascend.](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
The Ledger has a treatment plan view where you can create and manage predeterminations.	The Ledger doesn't have a treatment plan view; you create predeterminations in the Treatment Planner.
When claims are created they are sent to the Batch Processor and stored there until they are sent.	Dentrix Ascend does not have a Batch Processor. Each patient has an insurance claims page where you manage and submit claims, or you can see all unsent claims from the Unsent Claims section of the Home menu.
You must add supporting information, narratives, and attachments in the Ledger before submitting the claim to the Batch Processor and sending the claim electronically.	You can create claims as part of the patient's check out process and then go back to the claim later to add supporting information and attachments before sending the claim.
You can add screenshots, images, perio charts, documents, or files from your computer as claim attachments.	You can add images from the Imaging module or .jpg images from the Documents Manager as claim attachments; only .jpg files are allowed as attachments.
You can itemize insurance payments by procedure and update the payment table, or you can enter total insurance payments without itemizing.	There is no payment table to maintain, so you do not need to itemize by procedure. Dentrix Ascend factors plan exceptions into insurance estimates.
You can manually add a write-off to an insurance payment and tell Dentrix how to calculate it.	When you enter an insurance payment, Dentrix Ascend can automatically calculate and post write-off adjustments for you with the payment.

## Explore How to Work With Insurance Claims in Dentrix Ascend

Explore how to complete tasks like creating claims and predeterminations, adding attachments, sending claims, and posting insurance payments.



[Click here to explore the Insurance Claims Essentials tutorials.](#)



# FINANCIAL REPORTING

Dentrix Ascend has the same kinds of financial reports you’re used to seeing in Dentrix, like the day sheet, deposit slip, aging report, and insurance reports. These reports will look different than they do in Dentrix but will give you the same kind of information.

 [Click here to view the Financial Reporting overview video \(03:08 minutes\).](#)

## Key Differences

DENTRIX	DENTRIX ASCEND
You can generate and view the financial reports from the Office Manager module.	You can generate and view financial reports from the reports section of the Home menu.
The items listed on the deposit slip are grouped by the payment or adjustment types you assigned to the transaction.	The items list on the deposit slip are grouped by payment method (cash, check, credit card, and so forth).
The report that shows you patients with an outstanding balance broken down by aging is called the Aging Report.	The report that shows you patients with an outstanding balance broken down by aging is called the Aged Receivables report.
You can generate and print the Procedures Not Attached to Insurance Claims, Insurance Claims to Process, and Insurance Aging reports to follow up on insurance claims.	You can generate insurance reports to follow up on claims, and you can also use the interactive widgets in the Home menu. Claims automatically appear on the Unresolved claims widget after a custom time period you select.

## Explore How to Work With Financial Reports in Dentrix Ascend

Explore how to create and read financial reports like the deposit slip, day sheet, aged receivables, and insurance claim reports.

 [Click here to explore the Reporting Essentials tutorials.](#)



Dentrix Ascend uses Power Reports, which give you the flexibility to build your own financial reports.



[Click here to learn more about generating a power report.](#)

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# NEXT STEPS AND RESOURCES

Now that you have read about the key differences between Dentrix and Dentrix Ascend, watched the video overviews, and explored the tutorials, you're ready for the next steps in the process. Follow these steps to get your initial Ascend training and get ongoing help as you begin using Dentrix Ascend in your practice.

1

Now that you're familiar with the basics of Dentrix Ascend, you're ready for your training. We have excellent trainers who are ready to help you make this transition.

If you haven't already scheduled your training, contact your implementation project manager to schedule your training.

2

We're here to help you even after you have completed your transition to Dentrix Ascend.

Use our Resources for New Users to find instructions for completing common tasks and workflows that match your responsibilities.



[Click here to explore the Resources for New Users.](#)

3

Stay connected with us. Follow our Facebook page, subscribe to our blog, and subscribe to our newsletter to get the latest Dentrix Ascend news and expert tips.



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# **DENTRIX**ASCEND

[DentrixAscend.com](https://DentrixAscend.com)

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