AscendAcademic

ASCEND ACADEMIC, BY HENRY SCHEIN ONE | NEW FORMS EXPERIENCE

Ascend Academic New Forms Experience: Readiness Checklist

Please read this checklist in full, share it with anyone who manages forms, and work through it in order.

Why this matters: Upgrading changes how your clinic sends, completes and updates patient forms. Some steps can only be **completed before** you upgrade, and skipping them could mean patients losing access to forms they've started or your team losing the reference needed to recreate custom and consent forms.

At a Glance: Priorities in Order

Priority	Step	Applies to	Impact on your clinic
Critical	1. Complete in-progress patient forms	All clinics	Patients can't access unfinished forms after you upgrade.
Critical	2. Save custom and consent forms	Clinics using **custom** or **consent** forms	You'll need this content to rebuild forms after upgrading.
High	3. Schedule your upgrade	All clinics	Upgrading outside clinic hours avoids disruption while patients are using forms.
High	4. Prepare staff for chart-based updates	All clinics	Faculty will no longer edit completed forms; updates move to the patient chart.
Medium	5. Plan forms by location	All clinics	Forms are managed by location.
Optional	6. Review language needs	All clinics	Automatic translation may reduce the translated forms you maintain.
After upgrade	7. Review, rebuild and publish forms	All clinics	Get your Academic, consent and custom patient questionnaires ready for patients.

Before You Upgrade

1. Complete In-Progress Patient Forms | Critical

Once you upgrade, patients can no longer access forms they started but haven't completed.

☐ Identify patients with forms that were sent but not yet completed.

☐ Encourage patients and providers to finish their forms before you upgrade.

☐ Send required forms to upcoming patients early so they have time to complete them.

2. Save Your Custom and Consent Forms | Critical

You'll use this content to rebuild your forms after upgrading. **No custom or consent forms?** Skip to Step 3.

If you use custom forms

☐ Download and save each custom form your clinic uses.

☐ Identify and decide your plan for each form:

- Rebuild later as is
- Revise and then rebuild
- Rebuild from an academic template
- Retire, no longer needed

Tip: *This is a good opportunity to remove content you no longer need. Completing this review before upgrading makes it easier to rebuild and publish the forms your clinic needs.*

☐ Check the **Academic Forms, linked here** for a good starting point:

- Medical History V1 and V2,
- Dental History V1 and V2,
- Demographics,
- Dental Insurance and
- COVID-19 Patient Screening.

- View the full **Academic Forms here**, including every question, to compare them with your current forms and questionnaires.

If you use custom consent forms

☐ Download and save the wording from each consent form and keep it somewhere easy to access.

3. Schedule Your Upgrade | High

Why it matters: Upgrading outside clinic hours gives you a clearer switchover from your current Forms experience to the new one and reduces the chance of upgrading while patients are actively working on forms.

☐ Plan to upgrade outside regular clinic hours.

4. Plan Forms by Location | Medium

What's changing: Forms will be managed **by location** in the new Forms experience. Keep this in mind when planning how your organization will manage forms going forward.

☐ Decide which forms each location needs and keep this in mind as you review or rebuild forms.

5. Review Your Language Needs | Optional

What's changing: The new Forms experience includes automatic language support, making it easier to give patients forms in their preferred language. Automatic translation is available for **Spanish, Simplified Chinese, Traditional Chinese and Tagalog (Filipino)**.

☐ If you maintain separate translated versions in any of these languages, consider this when deciding which forms to keep.

After You Upgrade

6. Review, Rebuild and Publish Your Forms

All clinics

☐ Review the pre-populated Academic Forms for your location. Publish them as provided or customize them first.

- Medical History V1
- Medical History V2
- Dental History V1
- Dental History V2
- Demographics
- Dental Insurance
- COVID-19 Patient Screening

If you use custom consent forms

☐ Go to **Templates**, select the **Custom Consent Form** template, and paste in your saved wording. Review, publish, and repeat for each consent form.

If you use custom forms

☐ Rebuild each custom patient questionnaire you plan to keep, either from scratch or by starting with an Academic Template. Then make the updates you identified, review each questionnaire and publish it when it's ready.

We're here to help. A comprehensive onboarding guide will walk you through preparing, upgrading and getting started with the new Forms experience.