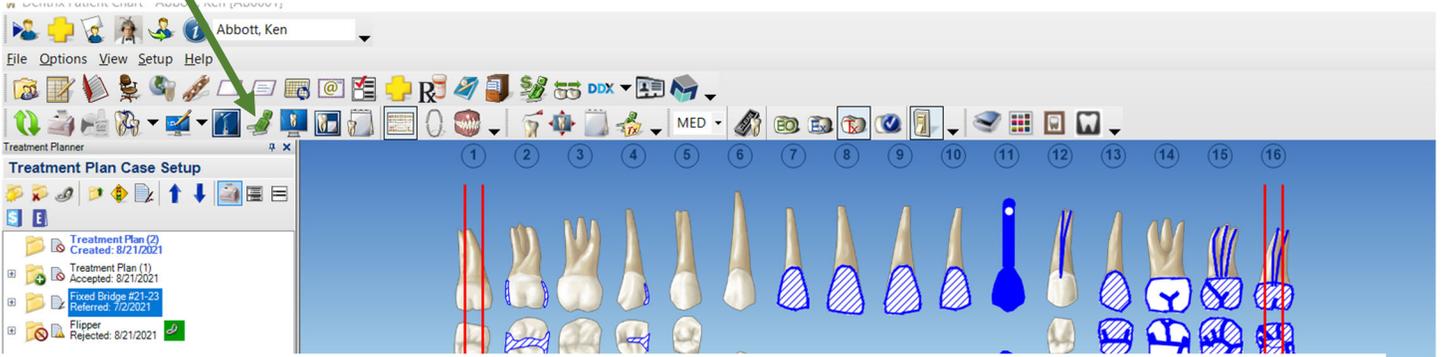


# DEVELOPING & TRACKING TREATMENT PLANS

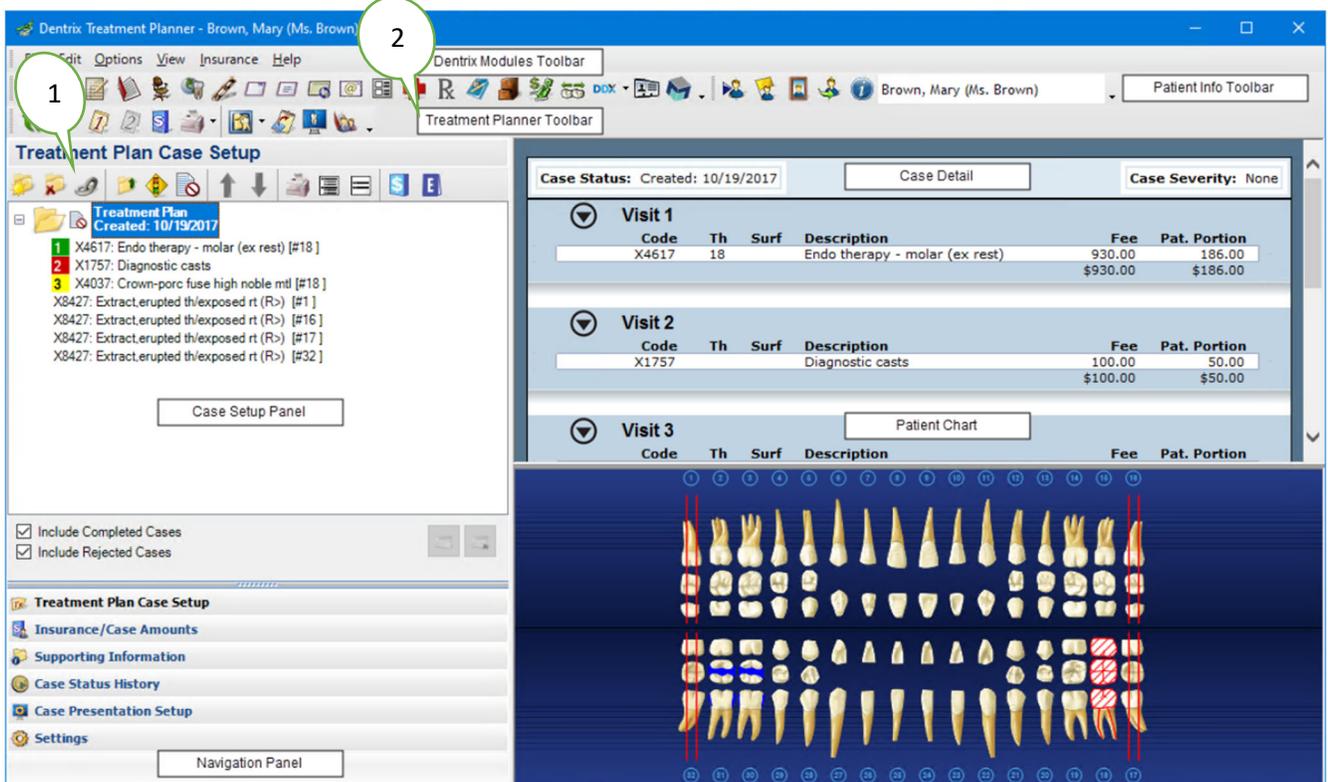
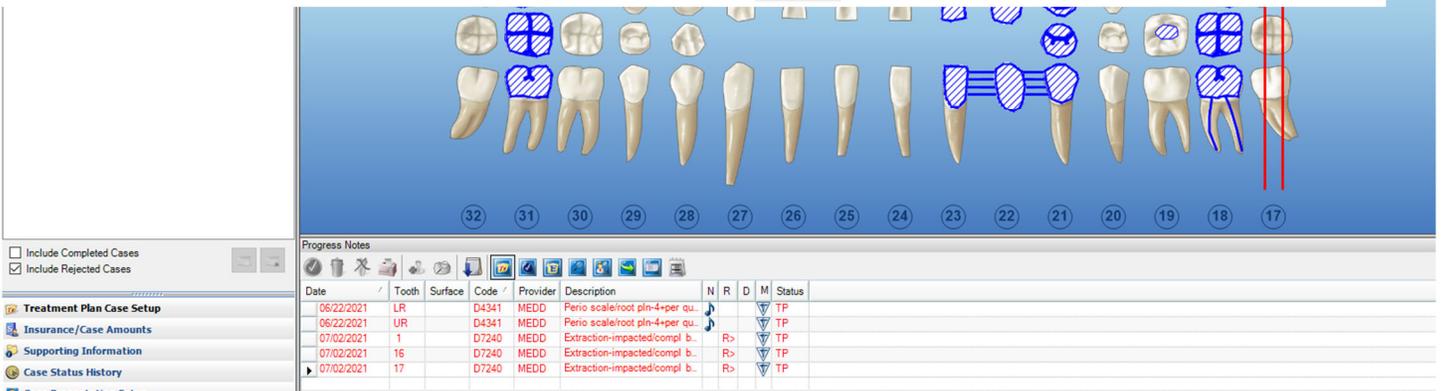
TREATMENT PLANS ARE ENTERED INTO THE CLINICAL CHART



THEN.....CLICK ON THE TREATMENT PLAN ICON



TO OPEN THE TREATMENT PLANNER



# DEVELOPING & TRACKING TREATMENT PLANS

1

The Treatment Plan Case Setup toolbar contains the following buttons:



These toolbar buttons are described in the following table:

Button	Name	Description
	<a href="#">New Case</a>	Creates a new treatment plan case that you can use to group treatment plan procedures.
	<a href="#">Delete Case</a>	Click to delete a treatment plan case.
	<a href="#">Link Alternate Cases</a>	Click to link several alternate treatment plans together; once one is accepted, the others are automatically rejected.
	<a href="#">Update Case Status</a>	Click to change the treatment plan case status to one of the following: Created, Printed, Pre-Auth (Primary), Pre-Auth (Secondary), Follow-Up Made, Referred, Proposed, Accepted, Rejected, Completed.
	Set Case Severity	Click to specify a treatment plan severity for the case, such as Immediate, Eventual, or Optional.
	<a href="#">No Consent Forms</a>	Click to add a consent form to or edit and remove consent forms from a case. The button changes based on the status of the consent form.
	Move Case Up	Click to move the selected case up one in the list.
	Move Case Down	Click to move the selected case down one in the list.
	Print	Click to define options for and then print a <a href="#">Treatment Case</a> , a <a href="#">Patient Treatment Case Report</a> , or a <a href="#">Practice Treatment Case Report</a> .
	Expand All	Click to expand the list view to include details.
	Collapse All	Click to collapse the list view to show only dates.
	Plan Detail	Click to review and/or modify the benefits and coverages of patient's insurance plan.
	Exceptions	Click to create and/or modify exceptions to the patient's insurance plan. This button only appears if the patient's insurance has exceptions for procedures.

2

## Treatment Planner toolbar



Button	Name	Description
	Refresh	Refreshes the data on other computers if your practice has a computer network.
	<a href="#">Update Treatment Plan Fees</a>	Click to update treatment plan fees manually to reflect any fee schedule changes.
	Primary Dental Insurance Notes	Click to view a primary dental insurance note.
	Secondary Dental Insurance Notes	Click to view a secondary dental insurance note.
	Insurance Benefits	Click to view a summary of the patient's insurance benefits.
	Print	Click to define options for and then print a <a href="#">Treatment Case</a> , a <a href="#">Patient Treatment Case</a> , or a <a href="#">Treatment Planner Report</a> .
	<a href="#">Treatment Planner View</a>	Click to choose from five different Treatment Planner views.
	Copy Case Detail to Clipboard	Copies the selected Case Detail information to the Windows Clipboard, where you can paste it into other programs by pressing Ctrl+V on the keyboard.
	<a href="#">Presenter</a>	Click to start the Dentrix Presenter module.
	Other Appointments	Click to display the <a href="#">Family Appointment List</a> dialog box in the Appointment Book with other appointments for family members.

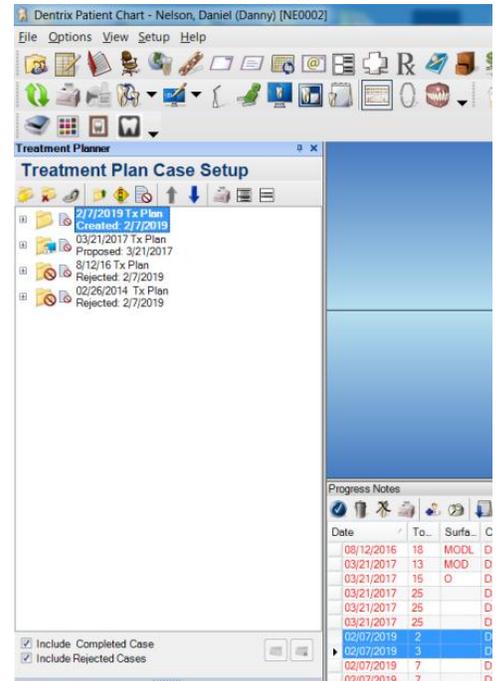
## Treatment Plan - Why rename cases

By renaming case and keeping them in date order, it is easy to see when treatment was 1<sup>st</sup> diagnosed, and then when it was rejected for delay in treatment and rediagnosed with an updated treatment plan.

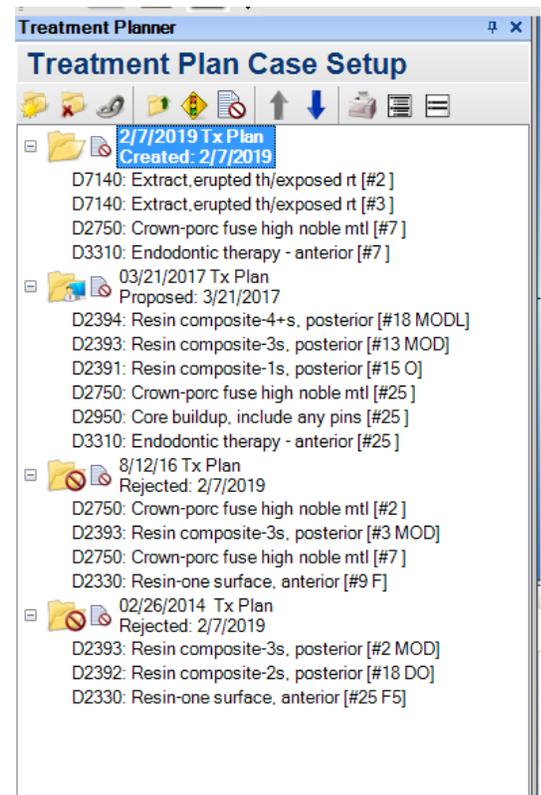
Just looking at tooth #2 in this example you can see that the diagnosis in 2014 was an MOD composite

In 2016 it was changed to a Crown and now in 2019 it needs extraction.

This becomes the history – much like our old paper charts, and is easier to follow than combing thru the clinical notes

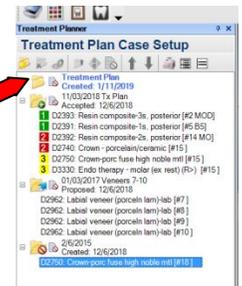


- [1] By renaming case and keeping them in date order, it is easy to see when treatment was 1<sup>st</sup> diagnosed, and then when it was rejected for delay in treatment and rediagnosed with an updated treatment plan.
- Just looking at tooth #2 in this example you can see that the diagnosis in 2014 was an MOD composite
  - In 2016 it was changed to a Crown and now in 2019 it needs extraction.
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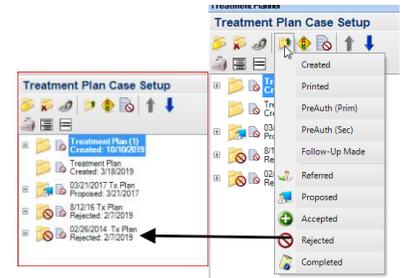
[2] Identifying the Default Treatment Plan

- a. The Default Treatment is Always the Treatment Plan with the Blue Letters!
  - i. Any new treatment added to the chart/treatment plan will go into this folder
- b. Once you update a Treatment Plan to either Accepted or Rejected, a new default treatment plan folder will be created



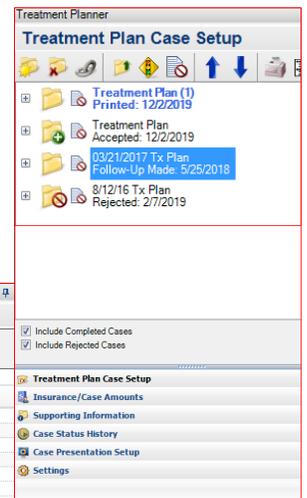
[3] Identify the Case Status

- a. Once you update the Case Status, the 2<sup>nd</sup> line next to the file folder changes to the Status Type you selected along with the Date the status was changed. The 1<sup>st</sup> line ONLY changes if you rename the case



[4] Looking at the treatment plan tree to the right, notice that each treatment plan has a different case status. To identify the history of each treatment plan, highlight the treatment plan then click on the Case Status History tab at the bottom

This will open the history of the treatment plan, and list each of the changes made along with notes added to identify why the status was changed.



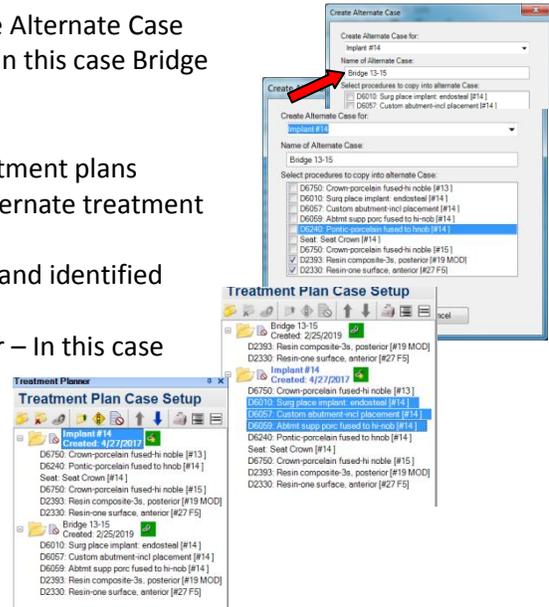
Case Status History		
Case: 03/21/2017 Tx Plan Follow-Up Made: 5/25/2018		
Date	Status	Comment
05/25/2018	Follow-Up Made	Reviewed with patient
04/02/2017	Printed	Printed and reviewed with patient
03/21/2017	Proposed	Reviewed with patient - discussed the progression of decay
03/21/2017	Created	Case created as a result of newly added procedure

# Alternate Treatment Plans

## [1] Alternate Tx Plans

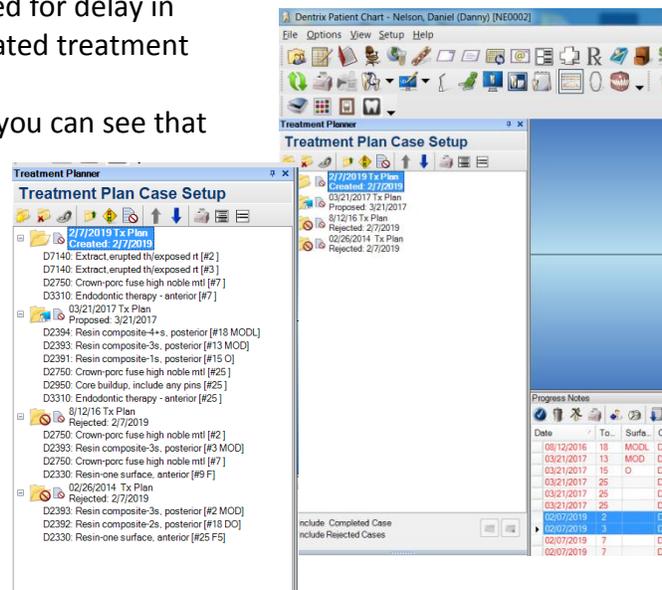
### a. Alternate treatment plans

- i. Enter All possible treatment into the treatment Plan i.e. Bridge or Implant – along with procedures that will be common to both
- ii. Right click and rename this treatment plan – preferably to the recommended treatment – i.e. Implant
- iii. Right click on the Implant Case and select Case Create Alternate Case
- iv. Name the Alternate Case to the optional case – in this case Bridge
- v. Unclick all procedures *not* common to both treatment plans
- vi. Highlight the treatment that should be in the alternate treatment and move it to the new treatment plan folder
- vii. you now have 2 treatment plans that are linked and identified with a chain link within a green box
- viii. The recommended case will have the yellow star – In this case the Implant



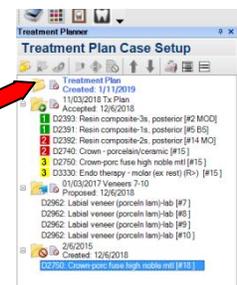
## [2] Rename Tx Plans

- a. By renaming case and keeping them in date order, it is easy to see when treatment was 1<sup>st</sup> diagnosed, and then when it was rejected for delay in treatment and rediagnosed with an updated treatment plan.
- b. Just looking at tooth #2 in this example you can see that the diagnosis in 2014 was an MOD composite
- c. In 2016 it was changed to a Crown and now in 2019 it needs extraction.
- d. This becomes the history – much like our old paper charts, and is easier to follow than combing thru the clinical notes



## [3] Identifying the Default Treatment Plan

- a. Always the Treatment Plan with the Blue Letters!
- b. Once you update the Treatment Plan to either Accepted or Rejected, a new default treatment plan folder will be created

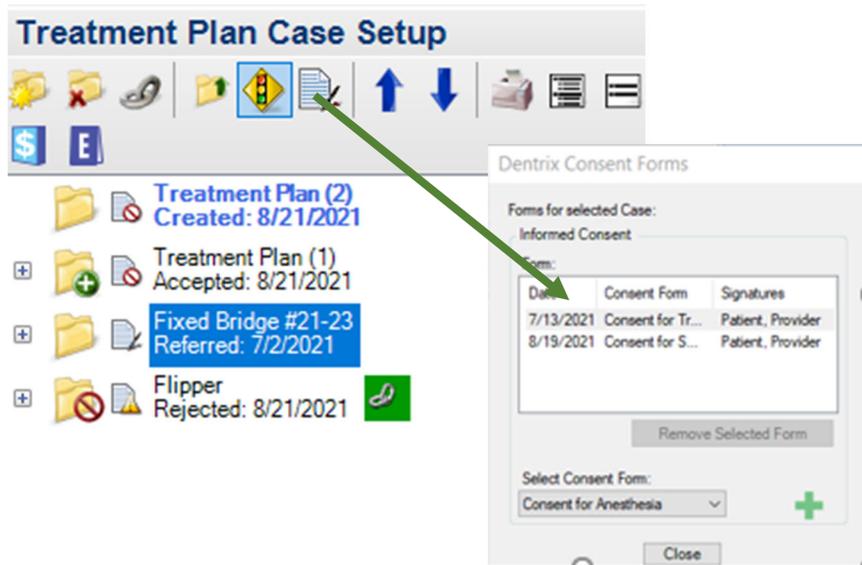
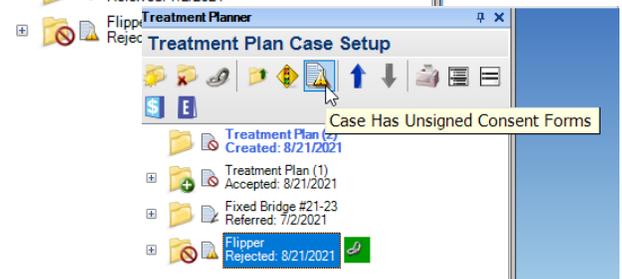
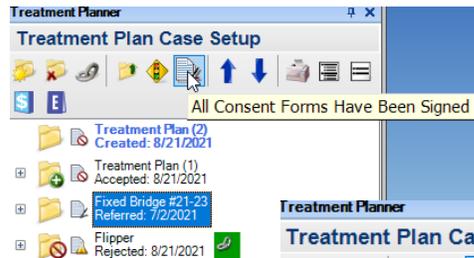


## Identifying cases with Consent Forms Attached

In the [Treatment Plan Case Setup](#) toolbar, click Consent Forms.

**Note:** The Consent Forms button changes based on the status of the consent forms in the case. The button will have one of the following four statuses:

-  All consent forms have been signed.
-  Consent forms missing signature.
-  Case has unsigned consent forms.
-  No consent forms.



Click on the Consent Form Icon and a list of consent forms Attached to that treatment plan Will be displayed

# Dana Rockey, DMD

Name Ken Abbott

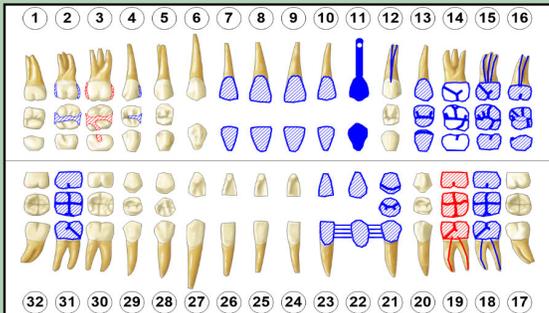
## :: TREATMENT CASE

Treatment Plan (2)

DATE	VISIT	TOOTH	DESCRIPTION	APPOINTMENT	FEE	PATIENT	PRIMARY	Office
06/22/2021	1	LR	Perio scale/root pln-4+per quad		260.00	52.00	208.00	230.00
06/22/2021	1	UR	Perio scale/root pln-4+per quad		260.00	52.00	208.00	230.00
Visit 1 Totals:					520.00	104.00	416.00	460.00
03/19/2022	2	19	Endo therapy - molar (ex rest)		744.00	148.80	595.20	930.00
Visit 2 Totals:					744.00	148.80	595.20	930.00
03/19/2022	3	3	Resin composite-4+s, posterior		252.00	148.70	103.30	315.00
Notes: Deep decay, Possible Root Canal and/or Crown _____								
Visit 3 Totals:					252.00	148.70	103.30	315.00
03/19/2022	4	19	Crown-porc fuse high noble mtl		796.00	796.00	0.00	2200.00
Visit 4 Totals:					796.00	796.00	0.00	2200.00

:: INSURANCE PROVIDER(S) ::	
Primary	Secondary
Connecticut General	Delta Dental*

:: TOTALS ::			
Fee	Patient	Primary	Office
2312.00	1197.50	1114.50	3905.00



:: FINANCIAL SUMMARY ::	
Treatment Plan Total	2312.00
Estimated Deductible to be Applied	0.00
Estimated Insurance Payment	1114.50
Estimated Patient's Portion	1197.50
Fee Expiration Date	08/21/2022

	Patient		Family	
	Primary	Secondary	Primary	Secondary
Annual plan benefits	1500.00	0.00	4000.00	0.00
Paid Benefits YTD	385.50	0.00	385.50	0.00
Pending Insurance Estimate YTD	385.50	0.00	385.50	0.00
Estimated Benefits Remaining YTD	1114.50	0.00	1114.50	0.00
Benefits Expire	12/31/2022		NA	
Deductible Owed YTD				
	Standard	0.00	0.00	50.00
	Preventative	0.00	0.00	0.00
	Other	0.00	0.00	0.00

Alternate Cases:

Case notes:

This is an estimate only of treatment diagnosed based on clinical and x-ray examination. Procedures may be changed, modified or added as we proceed with treatment based on unseen or hidden decay, nerve damage, fractures, infection or other conditions. You will be advised in advance of any such changes.

I have been presented with the risks, benefits and alternatives of this treatment plan and have had all questions answered to my satisfaction.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

PHONE:

REPORT  
DATE:  
03/19/2022