

Treatment Plan

You have a completely paperless system. Here is how it works!

First diagnose into the treatment plan!

Family Ledger for Rolling, John

John Rolling (1287) 795-4 303.609.0909ce Alert SC:
1535 W. Creek Road PR... AGE, KS 80120 Primary Dent: cog Secondary Dent:

Family Ledger | Dr's Treatment Notes | **Treatment Plan**

Plan Date	Target	Prac	GR	Code	Description	Tooth	Surface	Amount	Ins Est	I	I
11/22/11	11/22/11	1	1	2160	Amalgam Restorative	13	MOD	161.00	128.80		
11/22/11	11/22/11	1	1	2150	Amalgam Restorative	14	MO	148.00	118.40		
11/22/11	11/22/11	1	1	2150	Amalgam Restorative	15	MO	148.00	118.40		
11/22/11	11/22/11	1	1	2740	Crown All Porcelain	3		1128.00	564.00	U	

11/22/11 11/22/11 1 1 0.00 Add It

Patient Rec Notes Family File Pre-Auth Plan Rpt View Insurance

Next Apt. Work Auth. Balance: 1,585.00 Insurance: 929.60 Patient: 655.40

Use TAB or Move through fields. Highlight the procedure and Right Click for other options. Close

Figure 1

Diagnosing into the treatment plan streamlines everything. It increases performance, reduces errors increases communication, and provides the control indicating professionalism. Install a small computer in the area where diagnosing takes place or use the telephone to dictate to computer personnel.

The doctor or hygienist calls out a procedure and it is entered into the treatment plan and never has to be entered again. It can be used in **many different ways**, i.e. predeterminations, scheduling, charging from the Scheduler, filing primary and secondary insurance as appropriate, automatically removed from treatment plan when charged in ledger, insurance estimating and added to accounts receivable. It also is used for insurance billing, insurance payment tracking, production reports, and on and on. This is a huge time saver...all created through one entry!

The **GR column** allows you to group procedures into appointments. The treatment plan estimates the patient and the insurance company responsibility. Print the complete treatment plan to give the patient with our without fees. Pre-determinations are filed from the treatment plan. The highly effective gross-increasing feature Next Appointment Work Authorization is also located on this screen.

Second present the plan using the Next Appointment Work Authorization!

Date: 1/13/2010 Page: 1

Next Appointment Authorization

Your Name Here
4105 SOMERSET
COBRA CA 90210
642-8811

Name: TOM EICHHOLZ (369) Schedule: _____ Appointment Date: _____

Phone: 661-4678h Best Time to Call: _____ Short Notice? _____ Time Needed: _____

CODE	T	S	DESCRIPTION	AMT	DED	ADJ	INS PAY(P)	INS PAY(S)	PT. PAY
2750	30		Crown Porc w/ high n	806.00			403.00		403.00
2950	30		Crown Build-up	176.00			88.00		88.00
	30		smooth 14D						0.00
TOTALS:				982.00			491.00		491.00

Insurance benefit payments are ESTIMATES ONLY! Coverage may vary based on individual plan allowables.
 I understand my estimated portion is due the day of service.
 Since I do not have dental insurance coverage, I understand payment is due in full the day the dental services are rendered.
 Special Financial Arrangements: _____
 _____ Payment Due the Day of Service

The amount is for the service planned. The service may be changed during the procedure based on clinical findings.
 When I schedule an appointment to have this work done, I acknowledge these financial arrangements and authorize the doctor and/or his qualified assignees to perform the dental work listed above.

Signature: _____ Date: _____

Comments: _____

Figure 2

This document represents an error avoidance system dramatically affecting the bottom line in your practice. Its effects are demonstrated by more appointments scheduled, fewer missed appointments, increased payments and the reduction of diagnosed but unperformed procedures. It increases your gross production by 15-20%. This feature dramatically reduces bad debt. It is critical that the patient understands and signs the contract. Once you have a complete and signed document, you are ready to make the appointment.

Note: There are scripts used with this feature on the website www.datateamdds.com Concepts/ Ideas. Select "Top Producing Dentist" then page four.

Diagnosing into the treatment plan also activates the "Appointment Finder Feature" which is described on the website...page five of the same article regarding the open appointment system.

Now schedule an appointment!

Scheduler

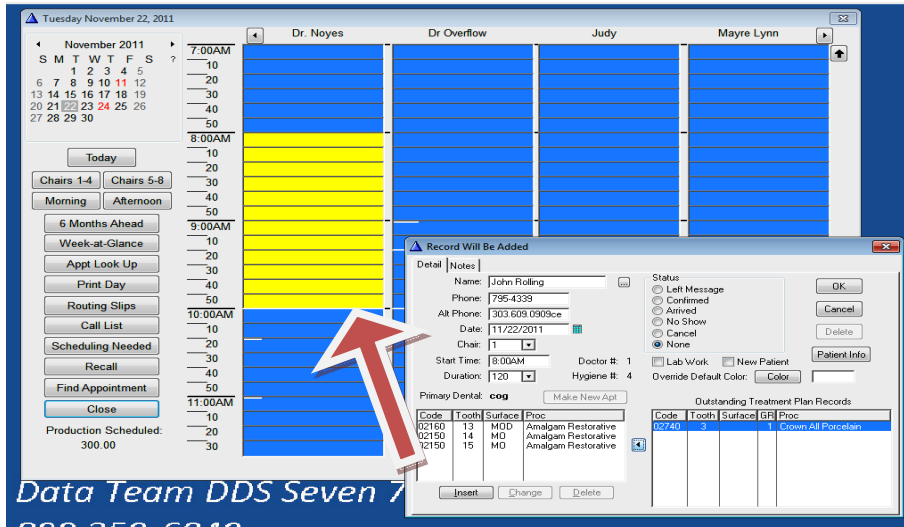


Figure 3

The procedures diagnosed to the treatment plan will be listed in the scheduler. Select and slide the procedure you want to perform into the appointment itself. Use the appointment to send email reminders under Patient Records> Appointment Reminders>Email.

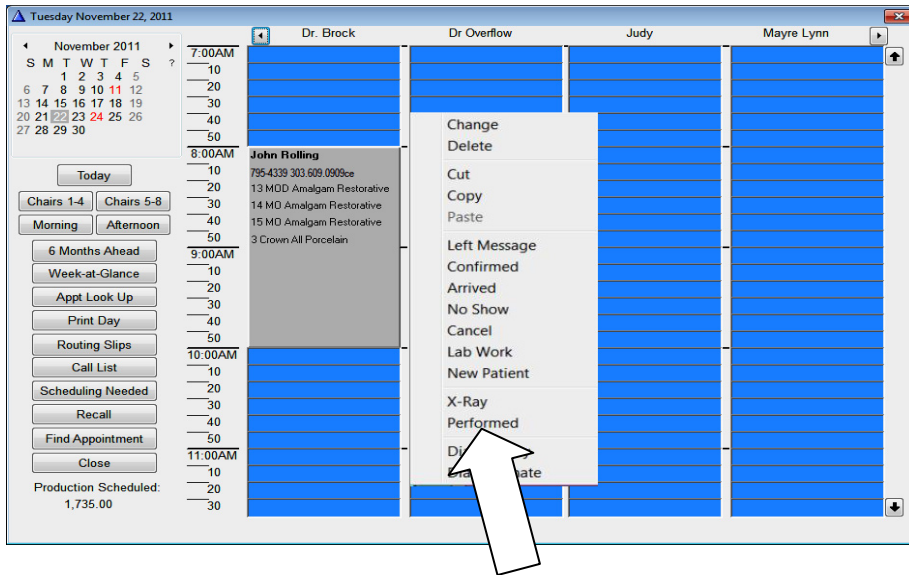


Figure 4

After the appointment is completed, charge the entire appointment from the scheduler to the ledger by right clicking and marking performed. When it turns grey, it means the procedures have been charged to the ledger.

Procedures are transferred from the Treatment Plan

Family Ledger

Date	Pr	Patient	Code	Proc	Th	Surf	Amount	Ins Est	Balance	U	I
11/22/11	1	Rolling, Justine	30	Insurance Filed (PP)					0.00		
11/22/11	1	Rolling, Justine	30	Insurance filed (PE)					0.00		
11/22/11	4	Rolling, John	1110	Prophylaxis			108.00	108.00	108.00	O	
11/22/11	1	Rolling, John	120	Periodic Oral Exam			42.00	42.00	150.00	O	
11/22/11	4	Rolling, John	272	Two bitewing x-rays			40.00	40.00	190.00	O	
11/22/11	4	Rolling, John	220	Periapical x-ray			28.00	28.00	218.00	O	
11/22/11	1	Rolling, John	30	Insurance filed (PE)					218.00		
11/22/11	1	Rolling, John	12	mastercard			-70.00		148.00		
11/22/11	1	Rolling, John	2160	Amalgam Restorative	13	MOD	161.00	88.80	309.00	U	
11/22/11	1	Rolling, John	2150	Amalgam Restorative	14	MO	148.00	118.40	457.00	U	
11/22/11	1	Rolling, John	2150	Amalgam Restorative	15	MO	148.00	118.40	605.00	U	
11/22/11	1	Rolling, John	2740	Crown All Porcelain	3		1,128.00	436.40	1,733.00	U	

Figure 5

Charges entered for patients with insurance are marked unfilled “U” and followed automatically. The default treatment notes are automatically placed in the doctor’s treatment notes at the same time.

Date	Pr	Proc	Th	Surf	Clinical Record
11/22/11	1	Crown All Porcelain	3		All porcelain crown with ceramic core, Sh 62, gingiva trimmed on th
11/22/11	1	Amalgam Restorative	15	MO	2 surface Amalgam with cavity liner Anesthetic Rendered
11/22/11	1	Amalgam Restorative	14	MO	2 surface Amalgam with cavity liner Anesthetic Rendered
11/22/11	1	Amalgam Restorative	13	MOD	3 surface Amalgam with cavity liner Anesthetic Rendered

Note: 3 surface Amalgam with cavity liner Anesthetic Rendered

Figure 6

Dr.'s Treatment Notes

As you can see, when an item is charged to the Ledger, the default Doctor’s note for that entry is placed in the [Treatment Notes](#). If you have a particular addition to make to a note, you may do so.

Complete the paperless visits with electronic copies of insurance info, etc.!

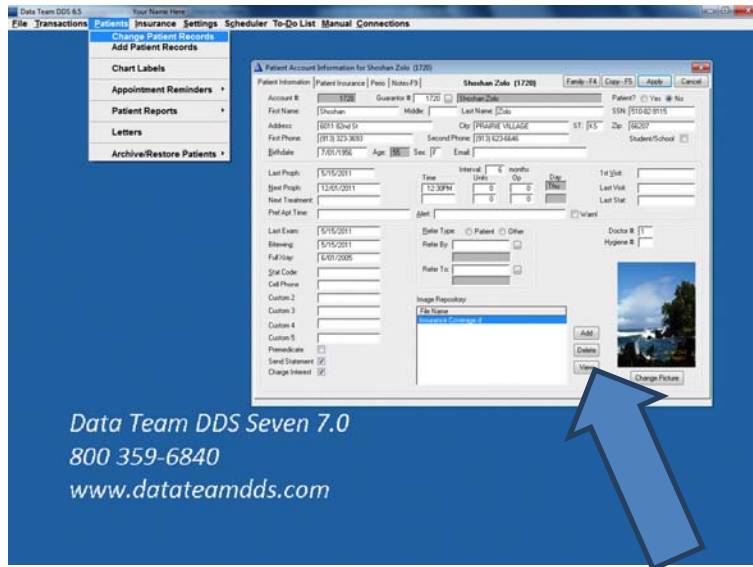


Figure 7

Place documents in the patient folder by clicking “Add” on the Image Repository. Documents in the .jpeg format are the most versatile and can be handled by any graphics program. MS Paint is the default but any graphics program may be used. Select the program to use in Settings>System Setting>Documents Depository Viewing Software.

Scanned documents, x-rays, photos, images of EOBs and documents, etc. can be stored here eliminating the need for paper