

# Treatment Planning and Case Presentation

Create and present treatment options effectively.

## Course Outline



1 Day: 9:00 a.m. – 5:00 p.m.

### Entering Treatment Recommendations

- Entering Treatment-Planned Procedures in the Patient Chart
- Entering Conditions and Clinical Diagnoses

### Creating Treatment Cases

- Ordering Procedures By Visit
- Adding and Deleting Treatment Plan Cases
- Creating Treatment Case Alternatives
- Setting the Recommended Case

### Working with Financial Estimates

- Viewing Treatment Case Financial Estimates
- Understanding Insurance Estimates
- in the Treatment Planner
- Setting Case Financing Status
- Setting Treatment Fee Estimate Expiration Date
- Updating Treatment Plan Fees

### Presenting Cases

- Customizing Treatment Case Printouts
- Presenting a Treatment Case
- Printing the Treatment Case Report

### Documenting Patient Consent

- Updating Case Statuses
- Viewing Case Status History
- Attaching a Consent Form to a Case
- Referring Patients to Other Providers for Treatment

### Generating Treatment Plan Reports

- Generating the Patient Treatment Case Report
- Unscheduled Treatment Plans Report
- Generating the Practice Advisor Report
- Using the Treatment Manager

### Customizing the Treatment Planner

- Customizing Consent Forms
- Creating Case Note Templates
- Modifying Patient Friendly
- Procedure Descriptions