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