

Treatment Planning & Case Presentation

Create & present treatment options effectively.

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
- Using patient-friendly procedure descriptions

Working with Financial Estimates

- Viewing treatment case financial estimates
- Understanding insurance estimates in the Treatment Planner
- Setting case financing Sstatus
- Setting treatment fee estimate expiration date
- Updating treatment plan fees

Presenting Cases

- Printing the Treatment Case Report
- Including/excluding dental plan maximums and deductibles
- Sub-totalling case estimates by visit
- Setting up case printout defaults

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