

Treatment Plans

Introduction

This document is for use by a dental office running Datacon Dental Systems Practice Management software with the Scheduler enabled and in use. This document is written with the system option “Treatment plans attached to schedule” set.

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- Create a List of Patients with Pending Treatment and Remaining Benefits.

Questions? Contact the staff at Datacon for help.
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What is a Treatment Plan?

Treatment plans are a place to store and organize pending treatments for a patient. Transactions on a treatment plan can be attached to an appointment, organized into phases or alternative plans, printed for the patient, and submitted to insurance on pre-authorization forms.

Why Use Treatment Plans?

- Treatment plans are a tool for reaching goals.
- Eliminate typing planned treatment in the appointment notes.
- Print pending or proposed treatment for the patient.
- Save time posting later.
- Provide the patient with financial estimates.
- Inform the patient of their options.
- Print pre-authorizations.
- Track treatment diagnosed vs. completed to see how effective your treatment planning is.
- Creates a current list of patients who need treatment for use in optimizing the schedule.
- The schedule will be more complete.
- Treatment plans are a tool for determining how many units a procedure takes.
- Get a list of patients with remaining benefits.

If you add a treatment plan through a patient, the transactions will be available to attach to an appointment later.

Locate the Patient's Treatment Plan Record

Anything you need to do with a patient's treatment plan is done through the treatment plan record for the patient. You can add a new treatment plan or edit an existing one, adjust insurance estimates, update fees, or print the treatment plan or an insurance form. No matter what you need to do, you start by locating the patient's treatment plan record.

There are a number of ways to get to the patient's treatment plan record. Here are two common ways:

- From the patient record: Make changes to a treatment plan from the patient record if you don't want to include them on an appointment, or if you want to include them on an appointment at a later time.
 - From the *Main Menu* screen, click **Patients & Accounts**.
 - Type in the patient's last name, first name and locate the patient.
 - Click the **Treatment Plan** segment control button and then click on the patient's name. The *Treatment Plan* screen for the patient will open. This is the treatment plan record for this patient.

- From an appointment: Make changes to a treatment plan from an appointment when you want to add or change pending treatment that is or will be attached to an appointment.

There are many ways to locate a patient appointment in your Datacon system. Here is a quick way to do it through the patient record:

If you add a treatment plan through an appointment, the transactions will automatically be attached to the appointment.

- From the *Main Menu* screen, click **Patients & Accounts**.
- Type in the patient's last name, first name and locate the patient.
- Click the **Recall** segment control button and then click on the patient's name. The *Patient appointment* screen for the patient will open. Find the appointment that you want to attach or modify pending treatment for if it is different than the appointment that you are on.
 - To choose a different appointment, click *Review appointments* and click the appointment you want to attach or modify treatment for.
- Click **Scheduled treatments** or **No scheduled treatments**. The *Select treatment plan for appointment* screen will open and a list of all pending treatment for this patient will display.
 - Click to highlight treatment that you want to include on the appointment, or click to de-highlight treatment that you want to remove from the appointment.
 - Click **Add** to add new pending treatment.
- Access the full treatment plan record from this patient by clicking **Edit treatment plan** at the bottom of the list of pending treatment. The *Treatment plan* screen for the patient will open. This is the treatment plan record for this patient.

If treatments are already on a treatment plan and you want to attach them to an appointment, do so through the appointment.

Add a New Treatment Plan

You can add a new treatment plan from the patient's treatment plan record. See the **Locate the Patient's Treatment Plan Record** section above for instructions on locating the patient's treatment plan record.

- Click **Diagnosis records**. A list of diagnosis records for this patient will open.
- Click **Add**.
 - If the patient is insured, review the insurance information and answer the question "Is this insurance information correct?"


- If you answer No, update the patient's insurance information and return to adding the treatment plan.
- Enter the procedure code.
 - If you don't know the code, click **Review All Procedures** to bring up the *Procedure code selection* screen.
 - Click the code you want, or click **Search** to locate the code.
 - To search for a code based on part of its description, click **Enter** then **Next**, type in part of the description for the search, then click **Enter**. For example, if you type "crown", all the procedures with the word "crown" in their descriptions will display.
- Enter each code for the treatment plan.
 - To repeat the procedure from the line above, type an apostrophe for the code.
 - If you change a fee, the fee amount will display in red.
- When you are done entering codes for the treatment plan, click **Exit**. On the resulting screen, you can optionally enter diagnosis information for the purpose of billing medical insurance.
 - Enter the initials of the person who diagnosed the treatment, and those of the Coordinator.
 - Click **Diagnosis codes** to enter up to four diagnosis codes.
 - Click **Notes** to enter notes for the treatment plan.

If some procedure codes on the Procedure code selection screen are dim, they are not available for this patient's fee schedule.

Edit a Treatment Plan


Edit a treatment plan from the patient's treatment plan record. See the **Locate the Patient's Treatment Plan Record** section above for instructions on locating the patient's treatment plan record. You can edit the treatment plan from the diagnosis record or from pending treatments.

- Edit from the diagnosis record.
 - From the patient's treatment plan record, click **Diagnosis records**. A list of diagnosis records for this patient will open.
 - Click on the diagnosis record for the date that you want to edit. The pending treatments for that diagnosis date will open.

- Make changes or add procedures as needed and then click .

- Edit from pending treatments.

To sort pending treatments into treatment plans A, B, C, and D, edit the treatment plan from pending treatments.

- From the patient's treatment plan record, click **All pending treatments**. A list of all pending treatment transactions will open.
- Click the treatment transaction that you want to edit. The diagnosis record that the transaction is associated with will open.
- Click **Treatment plan**. The treatment plan for the diagnosis record will open.
- Make changes or add procedures as needed and then click .

Sort Pending Treatment onto Different Treatment Plans



You can sort pending treatment onto treatment plans A, B, C, or D. These plans can indicate phases of treatment or alternate proposals. Pending treatment is sorted from the patient's treatment plan record. See the **Locate the Patient's Treatment Plan Record** section above for instructions on locating the patient's treatment plan record.

Sort pending treatments onto plans A, B, C, or D





- Click **All pending treatments**. A list of all pending treatment transactions will open.
- Use your arrow keys to move to the transaction that you want to sort, and press the A, B, C, or D key. The **Plan** column will indicate which plans the current transaction will appear on.
 - Use your up or down arrows or your mouse scroll feature to move up and down in the list.
 - A transaction can be on more than one treatment plan. Just press the corresponding letter key for each plan to include the transaction on: A, B, C, or D.
 - To remove a transaction from a treatment plan, press the corresponding letter again.

Edit a particular plan (A, B, C, or D)

- Return to the *Treatment plan for (name)* screen.

- Click the plan that you want to edit, **Plan A**, **Plan B**, **Plan C**, or **Plan D**. A list of pending treatments that are designated for that plan will open.
 - To add additional treatments, click . The list of all pending treatments will open.
 - Click to highlight or de-highlight the treatments you want to add or remove. The corresponding letter will display in the **Plan** column, or be removed accordingly.
 - To re-order the treatment transactions, click .

Print the Treatment Plan

- You can print the treatment plan from any screen in the patient's treatment plan where the  button appears.
 - To print the treatment plan, click  and answer Yes to the question "Would you like to print a treatment plan?"
- To print the treatment for a particular appointment, go to the appointment and click **Scheduled treatments**, then click . Only the transactions on the current appointment will print.
- You can also print a customized treatment plan if you have created one in Word Processing.
 - From the patient's treatment plan, press  and choose the customized document to merge the treatment plan record with.

Adjust Insurance Estimates on a Treatment Plan

- Click **Insurance estimates and fee updates** from the patient's treatment plan record, and then click **Review insurance estimates**.
- Click the procedure that you want to adjust.
- On the lower section of the screen, click the coverage that you want to adjust and enter the adjusted estimate.
- Click the coverage option drop-down to change the coverage option.

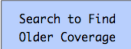
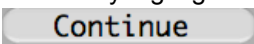
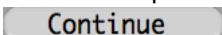
Recalculate Insurance Estimates on a Treatment Plan

- To recalculate insurance estimates using the employee's benefits in the event of a change in benefits, click **Insurance estimates and fee updates>Recalculate insurance estimates** from the patient's treatment plan record.
- Answer the question "This will recalculate insurance estimates based on existing fees. Continue?"

Update fees on a Treatment Plan

- To update fees on a treatment plan in the event of a change in fees in the practice, click **Insurance estimates and fee updates>Update fees** from the patient's treatment plan record.
- Answer the question "This will update fees and estimates using current fee schedules. Continue?"

Print Medical or Pre-authorization Insurance Forms


- To print a medical or pre-authorization insurance form, click **Print form for predetermination** from the patient's treatment plan record.
 - To update coverage, click **Insurance coverage (as of mm/dd/yyyy)**.
 - To bill under prior coverage, click  and enter an effective coverage date to find older coverage.
- Click the coverage to bill.
- Click **Use treatment plan for pre-determination**. Also use this option for medical forms.
- Click to highlight transactions to be included on the form, or click **SELECT for all transactions** to automatically highlight all new (not previously billed) transactions, then .
- Edit any additional information as needed.
- Click **Print form now** or **Save form to be printed later**.
- Click the drop-down list to choose the form, then click .

Create a List of Patients with Pending Treatment and Remaining Benefits

When your office uses treatment plans to record pending treatment for your patients, you can create a list of patients who have pending treatment and who also have insurance benefits remaining for this year. Once you have created the list you can use it as a call list to fill in your schedule, or as a mailing list for sending letters.

In this example, we will create a list of patients with pending unscheduled treatment who were diagnosed this year. We will remove inactive and uninsured patients, as well as patients with low remaining benefits. Finally, we will sort the list by name.



Create a New List

- From the *Main Menu*, click **User Defined Lists**. The *User Defined List* screen will open.
- Click  to add a new list. A new blank line will open.
- Type a description for the new list. Include the current date for later reference.
- Answer No to “Is this an account list?” and Yes to “Is this a patient list?”
- Your list is now created. Next, you need to specify who the list members will be.

Add Patients with Pending Unscheduled Treatment to the List

- Click the new list that you just created on your *User Defined Lists* screen. The list of entries for the new list will display. At this time, there are no entries.
- Click on the **List Builder** segment control button the *Turboscan* screen will open.
- In *Turboscan*, click **Patient>Treatment>Select by treatment plan**. A second window will open.
- Enter the beginning and ending dates of the diagnosis date range you are looking for in the **Diagnosis dates** field. In this example we'll use January 1st of this year through today. You can type in the date or type Y in the **from** date field to default to January 1st of this year, and type in the date or type D in the **to** date field to default to today's date.
- Click **Include scheduled and unscheduled treatment** to open the drop-down list, and click **Only include unscheduled treatments**.
- Click **Add patients. Please wait...** will display while *Turboscan* finds the patients meeting the specified criteria. When done, the number of patients found will display at the top of the screen.



Remove Inactive and Uninsured Patients

- Click  three times to where you can click **Name**.
- Click **Name>Remove inactive patients**, then click .
- Click **Patient>Insurance>Private patients>Remove selected patient type**. Stay here.

Remove Patients with Low Remaining Benefits

- Click **Patients by carrier or plan>Remove patients>by remaining benefit**.
- Enter your criteria for low remaining benefits. For our example we'll use from 0 to 200.00.
- Click **Begin scan**.
- Be patient. When the scan is complete, the message **Scan complete!** will appear. Click OK.

Sort the List by Name

- Click  back to the *List builder* screen.
- Click **Sort list by name** then click .
- Your list is complete.