1. Treatment plan

A. With the patient selected, click on **Tx Plan** tab.
B. Click on the **Tx Plan** tab.
C. Click on **Tx Plan**. You should be in the **Plans** sub-tab

2. Problems

In the Problems Sub-tab

A. Enter the plan title.
B. Enter the patients oral concerns click the Update tab.
3. Update Problems

A. Double-click on a problem to add.
B. To remove a problem added by in error, click on the problem in the bottom window and click on

3. Diagnosis

A. Click on sub tab.
B. Click on button to open Select Diagnosis Codes Window.
4. Select Diagnosis Code

Select all if you don't know the subcategory

Type in the first letters of the diagnosis

Double click on the diagnosis

Diagnosis that will display in the Tx Plan
A. Choose the ALL Category and type in the first few letters of the diagnosis.
B. Click on Description.
C. Double click on desired diagnosis to move it to the bottom window.

5. Detailed Plan

A. Click on **Detailed Plan** sub-tab
B. Click on **** to create your plan
C. Double click on the first treatment that you will do.
D. Choose Quick List or Full list, choose category, Find Tx plan, Click to expand options, click on **** to add to the Tx plan.
6. Treatment for Specific Sites

- 1. Click on tooth surfaces
- 2. Single click on procedure
- 3. Right mouse click
- 4. Click here to add tx

7. Faculty Approvals

A. Review plan with faculty. To edit plan, click on Entry button and return to previous window.
B. Click on a plan to have faculty approve.
When the faculty swipes their card, their name will appear under Approval user.

8. **Patient Approval**
   Click Patient Acceptance sub-tab. The text highlighted in blue is selected for patient approval. Click on Accept/Print button to get patient approval.
Review the plan with the patient. Click on the printer button or just exit out to activate the Signature pad.

Once the plan has both faculty and patient approval, it will display on the Treatment History tab.