Single Item Treatment Planning

Get to the Treatment Planning Module

1) Use the Rolodex to select your patient. (See the Selecting a Patient guide.)

2) Go to the EHR, Tx Plan tab.

3) A new set of tabs will appear at the bottom of the window. You will proceed from left to right through the tabs linearly as you create a Treatment Plan.

Create your single-item Treatment Plan

1) Plans tab

   Click the Chart-Add button. This will create a new Treatment Plan and advance you to the next tab.

2) Problems tab

   a) Type in the Plan Description. NOTE: This should be title for your Treatment Plan that is as specific as possible. Don’t describe your Treatment Plan as only “exam” or “ODTP.” Minimally, the type of exam (recall, new patient, emergency, etc.) should be in the description.

   b) Enter your patient’s Chief Concern. This is mandatory for all Treatment Plans.

   c) Advance to the next tab.
3) **Diagnosis tab**
   a) Click the Update… button.
   b) In the Select Clinical Diagnosis Codes window that pops up, use the Categories and folders to find the most appropriate diagnosis.

   **Rules for Selecting Diagnoses**

   | A) | Diagnoses must be as specific as possible. |
   | B) | Diagnoses attached to treatment procedures must accurately describe the reason the procedure is needed. |
   | C) | Diagnoses attached to diagnostic procedures are by definition presumptive, but must be realistic |

   c) Double-click the diagnosis to move it to the bottom “Selected Diagnoses” list, or use the arrows to move diagnoses on and off this list.

   d) Close the Select Clinical Diagnosis Codes window. The diagnoses you selected should now be on in the Diagnosis tab.

   e) Advance to the next tab.

4) **Detailed Plan tab**
   a) Start a new Treatment Plan Option by clicking the Chart Add button on the Detailed Plan tab. This will keep you on the Detailed Plan tab, but switch over to the Entry mode of the tab. NOTE: Be sure not to click the Chart-Add button to the right of the odontogram. This one:

   ![Diagram](image1.png)

   NOT this one:

   ![Diagram](image2.png)
b) In the Entry mode, make sure you are on Full List sub-tab and find the procedure you need to plan. (NOTE: In a Treatment Plan with more than one item, you must select the diagnosis before you select the procedure.) Double click on the procedure you wish to plan. This will automatically advance you to the Details sub-tab.

c) On the Details sub-tab, enter any specifics needed to plan the procedure. E.g. If Treatment Planning a direct restorative procedure, you would enter the tooth number and surfaces.

d) Click the Chart-Add button to add this procedure to the plan. It should appear blue on the list to the right.

e) Click the Display button to return to the Display mode of the Detailed Plan tab.

f) Get Faculty Approval by reviewing the Treatment Plan with a faculty member, clicking the Select Option button and having them swipe their ID card.

g) Advance to the next tab.

5) **Patient Acceptance tab**

a) Click the Accept/Print button. A window with the Treatment Plan will appear.

b) Review the Treatment Plan with your patient, including all alternatives, risks and benefits of the procedure.

c) Close the window. When you do this, another window will appear where the patient signs for acceptance of the Treatment Plan.

If the steps above were followed properly, the procedure in your Treatment Plan should appear on the In Progress tab.