Contents

Setting up the Treatment Planning Module ......................................................... 1
  Summary ................................................................................................................. 1
  Treatment Plan Options Setup .............................................................................. 1
Using the Treatment Planning Module ................................................................. 3
  Starting Treatment Plans ...................................................................................... 3
  Entering Problems .............................................................................................. 5
  Entering Diagnoses ............................................................................................ 8
  Creating Treatment Plan Options ....................................................................... 12
  Receiving Patient Acceptance ............................................................................ 17
Using Features in the Treatment Planning Module .............................................. 19
  New Features ....................................................................................................... 19
    Searching Diagnosis Codes .................................................................................. 19
    Displaying Separate Diagnosis Records for Each Problem ................................ 20
    Displaying Separate Treatment Records for Each Diagnosis ............................. 20
    Printing all Treatment Plans ............................................................................. 21
    Displaying Treatment History ........................................................................... 22
    De-Activating & Re-Activating Treatment Plans ............................................... 24
    Changing the Treatment Plan Window’s View Mode .......................................... 28
Existing Features .................................................................................................... 34
  Editing Records .................................................................................................... 34
  Deleting Records ................................................................................................... 35
  Adding Treatment Plan Objectives & Notes ....................................................... 35
  Adding Problem Notes ......................................................................................... 35
  Adding Diagnosis Notes ....................................................................................... 37
  Copying Treatment Plan Options ........................................................................ 38
Treatment Planning Module

In version 5.20, the Treatment Planning module has been redesigned to improve its usability. This document describes the changes made to this module, provides guidance on the basic workflow of creating treatment plans, and shows you the new locations of existing features.

Setting up the Treatment Planning Module

Summary

No new setup required. There are new fields in the configuration of problem and diagnosis codes, a new diagnosis code synonym configuration, and additional levels available in the diagnosis code quick list. In addition, the Treatment Planning module uses entirely new windows and will require you to reconfigure the PowerAdmin module to secure access to the Treatment Planning module’s functionality. This enhancement changes only the look-and-feel of the Treatment Planning module, and therefore affects only the usage. However, there are a few changes to the Maintenance module to support this new workflow.

Treatment Plan Options Setup

The general treatment planning functionality has been deprecated in the new release. There are no longer any limitations preventing a user from accessing a treatment plan because it was created using different options.

Current:
In Maintenance module - Tx Plan tab - Tx Plan Options icon (old name) - Tx Plan Options window (old name):

![Tx Plan Options window](image-url)
New:
In Maintenance module - Tx Plan tab - Treatment Plan Options icon (renamed) - Treatment Plan Options window (renamed and changed):

Prior to version 5.20, problems could only be assigned to a single treatment plan. Now a problem can be assigned to any number of treatment plans.

- **Select from existing problems when adding problems to the plan**: Deselect this checkbox if you want providers to manually search for and select the correct problem. Select this checkbox if you want the provider to select from the list of patient’s problems to start the plan. This functionality is explained in the [Entering Problems](#) section.

- **Diagnosis Path**: This drop-down field indicates the display of the diagnoses pop-up window when you select a diagnosis from a list view. This drop-down field displays the following options:
  
  - **Show Nothing**: This option, if selected, hides the diagnosis tree in the diagnosis pop-up, and only displays the diagnosis code.
- **Show Full Path**: Displays the full tree in the diagnosis pop-up when you select a diagnosis from a list view. This is defined in the Clinical Diagnosis List window (in Maintenance window - Clinical tab - Clinical Diagnosis Codes icon).

- **Show Quick List Categories**: Displays the diagnoses quick list category, when you select a diagnosis from a list view, as set up for your user or user level, defined in the Quick List Categories window (in Maintenance window - EHR tab - EHR Display Options icon - EHR Display Options - (Quick Lists)).

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**Using the Treatment Planning Module**

**Starting Treatment Plans**

To start a new treatment plan:

1. Go to the EHR window’s Tx Plans tab.

2. Click (Create a new Record).
axiUm displays the Treatment Plan window (new).

Use this window to enter treatment plans.

Note: If you select a different patient while the Treatment Plan window is displayed, axiUm closes the Treatment Plan window.

3. Enter the following fields:
   - Tx Plan Description: Amalgam restoration
   - Chief Concerns: Toothache

You have successfully started a treatment plan.

Next, we will enter the problem.
Entering Problems

To enter a problem:

1. Go to the Problems tab.

![Problems tab](image)

2. Click on the line displaying the text **New item**.

Based on the Treatment Plan Option window’s **Select from existing problems when adding problems to the plan** checkbox, if selected, the user will be prompted with a window to select from the patient’s current problems to add to the treatment plan.

Otherwise, axiUm displays a data-entry pop-up window with the Problem drop-down field expanded, and the cursor is in the Problem field.

![Data-entry pop-up window](image)

3. Go to the Problem field and begin entering the problem.

Partial entries will retrieve any problem codes or problem descriptions containing this sequence. For our example, we will enter `dis` to begin searching for the problem Discolored Restoration. Note: Entering `color` will not find Discolored Restoration but entering `rest` will find it. axiUm only looks at the beginning of each word matching your search text.
4. From the list of options, select a problem. For our example, we will select the Discolored Restoration option.

axiUm displays your selection in the Problem field.

Alternatively, you can enter problems by going to the Problem field and clicking (ellipsis) to display the Select Problem window (new).

Use this window to search for and select a problem. If the problem code has been configured to require or allow a site/surface then you may enter this here. In addition, the problem status may be defaulted and entered.

5. Press the Enter key.

Alternatively, click (Save and Close).

axiUm saves the problem, closes the pop-up window, and opens a new pop-up window to enter the next problem.
For our example, we will enter only one problem.

6. Click 🗑️ (Close Without Saving).

axiUm closes the pop-up window.

Note: If you enter another problem that duplicates an existing problem in the same treatment plan, axiUm displays the Tx Plan Duplicate Problem Warning window (new).

You have successfully entered a problem.

To view the problem history:
1. Go to the Problems tab.
2. Highlight a record.
3. Right-click to display a list of options.
4. Select the History option.

axiUm displays the Problem History window (changed). The following fields are new:
- Site
- Surface

Use this window to view the history of the selected problem record.

Next, we will enter the diagnosis.

**Entering Diagnoses**

To enter a diagnosis and link it to a problem:

1. Go to the Diagnoses tab.

2. Click on the line displaying the text **New item**.

   axiUm displays a data-entry pop-up window.
3. Go to the Diagnosis field and enter the diagnosis.

Partial entries will retrieve any diagnosis codes or diagnosis descriptions containing this sequence. For our example, we will enter restoration to begin searching for the diagnosis Restoration Fracture. Entering color will not find Discolored Restoration but entering fract will find it. axiUm only looks at the beginning of each word matching your search text.

From the search results, click the Restoration Fracture option.

Alternatively, go to the Diagnosis field and click (ellipsis) to display the Select Clinical Diagnosis window (changed) to search for and select a diagnosis.
For instructions on using this window for searching diagnosis codes, see Searching Diagnosis Codes.

Next, we will link this diagnosis to the problem.

4. From the pop-up window, click the Problem drop-down field.

axiUm displays a list of problems you entered earlier in the Problems tab.

7. Select the checkbox next to a list item. For our example, we will select the Discolored Restoration checkbox.

axiUm displays your selection in the Problem field.
8. Click (Save and Close).

axiUm saves the diagnosis, closes the pop-up window, and opens a new pop-up window to enter the next diagnosis.

For our example, we will enter only one diagnosis.

9. Click (Close Without Saving).

axiUm closes the pop-up window.

Note: If you enter another diagnosis that duplicates an existing diagnosis in the same treatment plan, axiUm displays a message box:
You have successfully entered a diagnosis.

To view the diagnosis history:

1. Go to the Diagnoses tab.
2. Highlight a record.
3. Right-click to display a list of options.
4. Select the History option.

axiUm displays the Diagnosis History window (new).

Use this window to view the history of the selected diagnosis record.

Next, we will create a treatment plan option.

**Creating Treatment Plan Options**

To create a treatment plan option:

1. Go to the Option 1 tab.
2. In the Description field, replace the text Option 1 with the description of your first treatment plan option. For our example, we will enter **Amalgam restoration**.

axiUm changes the tab name from Option 1 to Amalgam restoration.

3. Click on the line displaying the text **New item**.

axiUm displays a data-entry pop-up window.
4. In the Provider field, enter the provider ID of the provider performing this treatment. For our example, we will enter **D151** (David Caan).

![Provider ID entry](image)

Alternatively, go to the Provider field and click (ellipsis) to display the providers List window to search for and select a provider.

![Providers List](image)

5. Click the Diagnosis drop-down field.

axiUm displays a list of diagnoses you entered earlier in the Diagnoses tab.

![Diagnosis drop-down](image)

6. Select the checkbox next to the list item. For our example, we will select the **Restoration Fracture** option.

axiUm displays your selection in the Diagnosis field.

![Diagnosis selection](image)

7. Go to the Procedure field and enter a procedure.

Partial entries will retrieve any procedure codes or procedure descriptions starting with this sequence. For our example we will enter **amalgam** to begin searching for the procedure 1-surface amalgam.

![Procedure entries](image)
8. Select the checkbox next to the list item. For our example, we will select D2140, 1 surf. amalgam.

axiUm displays your selection in the Procedure field.

Alternatively, go to the Procedure field and click (ellipsis) to display the Select Procedure window (new) to search for and select a procedure.

Note: Use the Expert tab if you want to create a treatment plan using the Expert mode.

Because we entered a procedure code involving tooth surfaces, axiUm enables the Site field and the Surface field.

9. Enter the Site field and the Surface field. For our example, we will enter the following:
   - Site: 6
   - Surface: M
Alternatively, go to the Odontogram and on tooth #6 click on surface M. The Site field and the Surface field populates automatically.

10. Click (Save and Close).

axiUm saves the treatment option, closes the pop-up window, and opens a new pop-up window to enter the next diagnosis.

For our example, we will enter only one problem.

11. Click (Close Without Saving).

axiUm closes the pop-up window.
You have successfully entered a treatment plan.

Next, you must receive approval for the treatment option.

**Receiving Patient Acceptance**

Receive patient acceptance and print the treatment plan contract:

1. Click the Pt. Accept/Print button.

axiUm displays the Treatment Plan Contract.
2. Follow the patient acceptance procedure as usual.

Note: If you have purchased the Quotes module, axiUm displays the Billing Options for Planned Treatment window before saving the record to the selected patient's chart. If you do not have the module, axiUm skips this section.

Once you have completed all the steps to this point, you can close the Treatment Plan window by clicking (close).

axiUm returns to the EHR window's Tx Plans tab, and displays the new treatment plan record in the list view.

You have successfully created a treatment plan.
Using Features in the Treatment Planning Module

New Features

The following sections explain features new to axiUm 5.20.

Searching Diagnosis Codes

A new search capability has been implemented in the Select Clinical Diagnosis window to improve the speed and usability of this functionality.

Note: The same search capability has also been implemented in the Select Problem window.

- When you begin entering text in the Criteria field, axiUm automatically switches to the Search tab (if not already selected). Partial entries will retrieve any diagnosis codes or diagnosis descriptions containing this sequence. For our example, we will enter restoration to begin searching for the diagnosis Restoration Fracture.

  Note: Entering color will not find Discolored Restoration but entering fract does find it. axiUm only looks at the beginning of each word matching your search text.

- The Sort by drop-down field displays options for the sort order of the search results (rank, code, or description).
• Going to the **Search on** section and selecting/deselecting criteria checkboxes will add/remove items from the current search results.

• Going to the Filter by Category drop-down field and selecting an option (other than the N/A option) will limit the search results to the selected category.

• Going to the Filter by Quick List drop-down field and selecting an option (other than the N/A option) will limit the search results to the selected quick list category.

• Going to the list view and highlighting an item displays a pop-up window. The content of this pop-up is based on the settings in the Treatment Plan Options window. For information on this setup, see **Treatment Plan Options Setup**.

**Displaying Separate Diagnosis Records for Each Problem**

With the ability to add multiple problems per diagnosis, all problems are displayed in a single field, each item separated by a comma. This may be difficult to view and there may be times when you need to display each diagnosis by problems, so that each problem is a separate record each diagnosis, or one record for each problem associated to the selected diagnosis.

To display separate treatment records for each problem:

1. Go to the Diagnoses tab.

2. From the list view, highlight a record.

3. Right-click to display a list of options.

4. Select the Row Per Problem option. axiUm displays multiple records (one for each problem associated to the selected diagnosis).

**Displaying Separate Treatment Records for Each Diagnosis**
With the ability to add multiple diagnoses per treatment, all diagnoses are displayed in a single field, each item separated by a comma. This may be difficult to view and there may be times when you need to display treatments by diagnosis, so that each diagnosis is a separate record for each treatment, or one record for each diagnosis associated to the selected treatment.

To display separate treatment records for each diagnosis:

1. Go to a treatment option tab.

2. From the list view, highlight a record.

3. Right-click to display a list of options.

4. Select the Row Per Diagnosis option. axiUm displays multiple records (one for each diagnosis associated to the selected treatment).

**Printing all Treatment Plans**

To print all treatment plan options:

1. Go to the Treatment Plan window and click on an option tab.
2. Click on the Print drop-down field.

![Print drop-down field]

axiUm displays a list of options.

3. Click Print All Options.

axiUm prints all treatment options, in a single Treatment Plan report, to the default printer.

**Displaying Treatment History**

To display treatment history:

1. Go to a treatment option tab.

![Treatment history display]

2. From the list view, highlight a record.
3. Right-click to display a list of options.

4. Select the History option.
   axiUm displays the Treatment History window (new).
Note: This Treatment History window is different from the other Treatment History window (accessed from Transactions window - Treatment tab - list view - Show History right-click option).

De-Activating & Re-Activating Treatment Plans

You can de-activate only those treatment plans that are unapproved. Once a treatment plan has been approved, you can no longer de-activate it.

To de-activate a treatment plan:

1. Go to the EHR window’s Tx Plans tab.

2. Highlight a record from the list view.
3. Click ![Make Inactive] (new).

   axiUm displays the Make Treatment Plan Inactive window (new).

4. Enter the fields. For our example, we will enter Patient taking too long to decide.

   If you want to update any planned treatment associated with the treatment plan, then select the Make treatments inactive via changing their Status to checkbox and from the associated drop-down field, specify the status to set the planned treatments to. This will prevent any provider from scheduling or completing the planned treatments from this treatment plan.

5. Click the OK button.
axiUm saves the entries, closes the Make Treatment Plan Inactive window, and returns to the Tx Plans tab.

axiUm displays inactive treatment plans using strikeouts.

If you highlight this record, axiUm displays the Inactive Reason field that displays the reason you entered earlier. In our example, this shows “Patient taking too long to decide.”

You have successfully de-activated a treatment plan.

De-activated treatments can be re-activated. For instructions on re-activating an inactive treatment plan record, see the next procedure.

To re-activate an inactive treatment plan:

1. Go to the Tx Plans tab and highlight a record from the list view.
2. Click 📝 (Re-Activate).

   axiUm displays a message box.

   ![Message Box]

   Are you sure that you want to re-activate this entry?

   ![Yes No Buttons]

3. Click the Yes button.

   axiUm display the Treatment Plan Re-activate Question window (new).

   ![Treatment Plan Re-activate Question]

   Use this window to change the status of this treatment plan upon re-activation.

   - If you wish to update the status of any of the planned treatments for this plan, select the status from the **Do you want to update their status to** drop-down field and click the Yes button.
   - If you do not wish to update the status of any of the planned treatments, click the No button.

   For our example, we will leave the status as is.

4. Click the No button.
axiUm closes the Treatment Plan Re-activate Question window, returns to the EHR window’s Tx Plans tab, and re-activates the treatment plan record.

<table>
<thead>
<tr>
<th>Date Added</th>
<th>Treatment Plan</th>
<th>Selected Option</th>
<th>Date Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/04/2013</td>
<td>Amalgam restoration</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

axiUm removes the strikeout from the treatment plan record.

You have successfully re-activated an inactive treatment plan.

**Changing the Treatment Plan Window’s View Mode**

This is the default view. This is what you see when you first open the Treatment Plan window:

Click on the Expand button by the Problems tab or the Diagnoses tab.
axiUm combines these two tabs:

Click the Restore button.
axiUm returns to the original view:

Click the other Expand button.
axiUm expands the lower list view where the treatment plan options are displayed, and hides the Problems tab and the Diagnoses tab:

Click the Restore button.
axiUm returns to original the original view:

Click the Hide button.
axiUm hides the list view that displays the treatment plan options and displays only the Problems tab and the Diagnoses tab:

Click the Show button.
Existing Features

The following sections are pre-existing features that are accessed differently in axiUm 5.20 than in previous versions.

Editing Records
To edit a record, do one of the following:

- Highlight the item from the list view and select the Edit right-click option (if modifying a problem record or a diagnosis record), or the Edit Treatment right-click option (if modifying a treatment record).

- Double-click on the record to display the associated edit-type window.

Deleting Records

You can delete only those problems and diagnoses in unapproved treatment plans. Once a treatment plan is approved, you can no longer delete the associated problems and diagnoses.

To delete a record, highlight the item from the list view and select the Delete right-click option (if deleting a problem record or a diagnosis record), or the Delete Treatment right-click option (if deleting a treatment record)

Adding Treatment Plan Objectives & Notes

To create treatment plan objectives and treatment plan notes, click on the Objectives button and the Notes button, respectively.

Adding Problem Notes

To create notes for problems:

1. Go to the Problems tab.

2. Highlight a record.
3. Right-click to display a list of options.

4. Select the Note option.
   
   axiUm displays the Problem Note window (new).

   ![Problem Note window]

   Use this window to create notes to a specific problem in the selected treatment plan.

5. Click the OK button.
   
   axiUm saves the entry, closes the Problem Note window, and returns to the Treatment Plan window.

   An icon 📝 (note) indicates that a note exists for this record.
You have successfully created a note for the selected problem.

**Adding Diagnosis Notes**

To add notes to problems:

1. Go to the Diagnoses tab.

2. Highlight a record.

3. Right-click to display a list of options.

4. Select the Note option.

   axiUm displays the Diagnosis Note window (new).
Use this window to create notes for a specific diagnosis in the selected treatment plan.

5. Click the OK button.

axiUm saves the entry, closes the Diagnosis Note window, and returns to the Treatment Plan window.

An icon  (note) indicates that a note exists for this record.

You have successfully created a note for the selected diagnosis.

**Copying Treatment Plan Options**

To copy a treatment plan option:

1. Click on the tab of the treatment plan option you want to copy. For our example, select Amalgam restoration.
2. Do one of the following:

- Select the Copy Option right-click option.

- Click the Copy Option button.

axiUm makes a copy of the selected treatment plan option.
The new tab displays the text *Copy of Amalgam restoration*. You can change this by going to the Tx Option Description field and entering a different name.