

PLEASE NOTE: Some slides and elements have been removed for this sample.

Treatment Plan Presentation

May 2018

Course Objectives



This course explains how to deliver a successful treatment plan presentation using Dentrix Enterprise.

Upon completion of this course you will be able to:

- Describe the steps involved in a treatment plan presentation
- Define the key components of a financial arrangement
- Identify the communication stages between the clinical team and the administrative team
- Employ best practices to present treatment payment options
- Manage unscheduled treatment in Dentrix

Prepare for Success

Preparation and organization give you the confidence to present successful treatment plans!

Clinical staff and administrative staff must remain in communication at all times.

Record all details of the treatment plan in Dentrix.



Skills



Communication



**Dental
Knowledge**



Confidence

Qualities that support a strong treatment plan presentation



Organization



Empathy



**Quick
Thinking**

Tools

Fee Schedule

**Dental
Coverage**

**Treatment Plan
Cover Sheet**



Tools used for accurate treatment plan presentation

**Treatment Plan
Estimation**

**Care Credit
Finance
Calculator**

Peers



Treatment Plan Phases

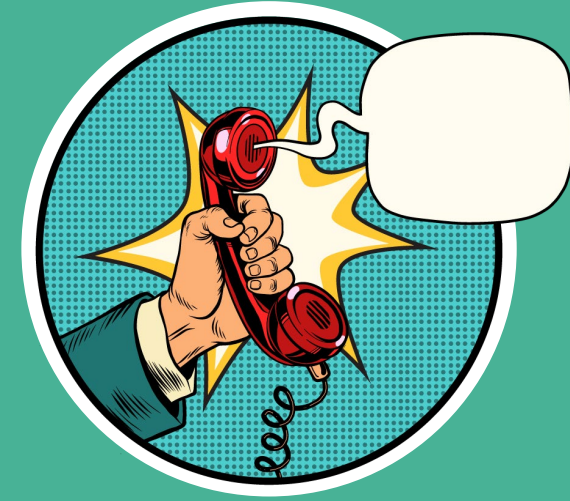
The Exam



The Financial



The Follow-Up



The Exam



1

Clinical: Treatment Diagnosed

Send a BlueNote to the admin team with Tx info (fillings, crown, bridge, etc.)

3

Clinical: Enter Treatment

Sequence treatment then send BlueNote when done

2

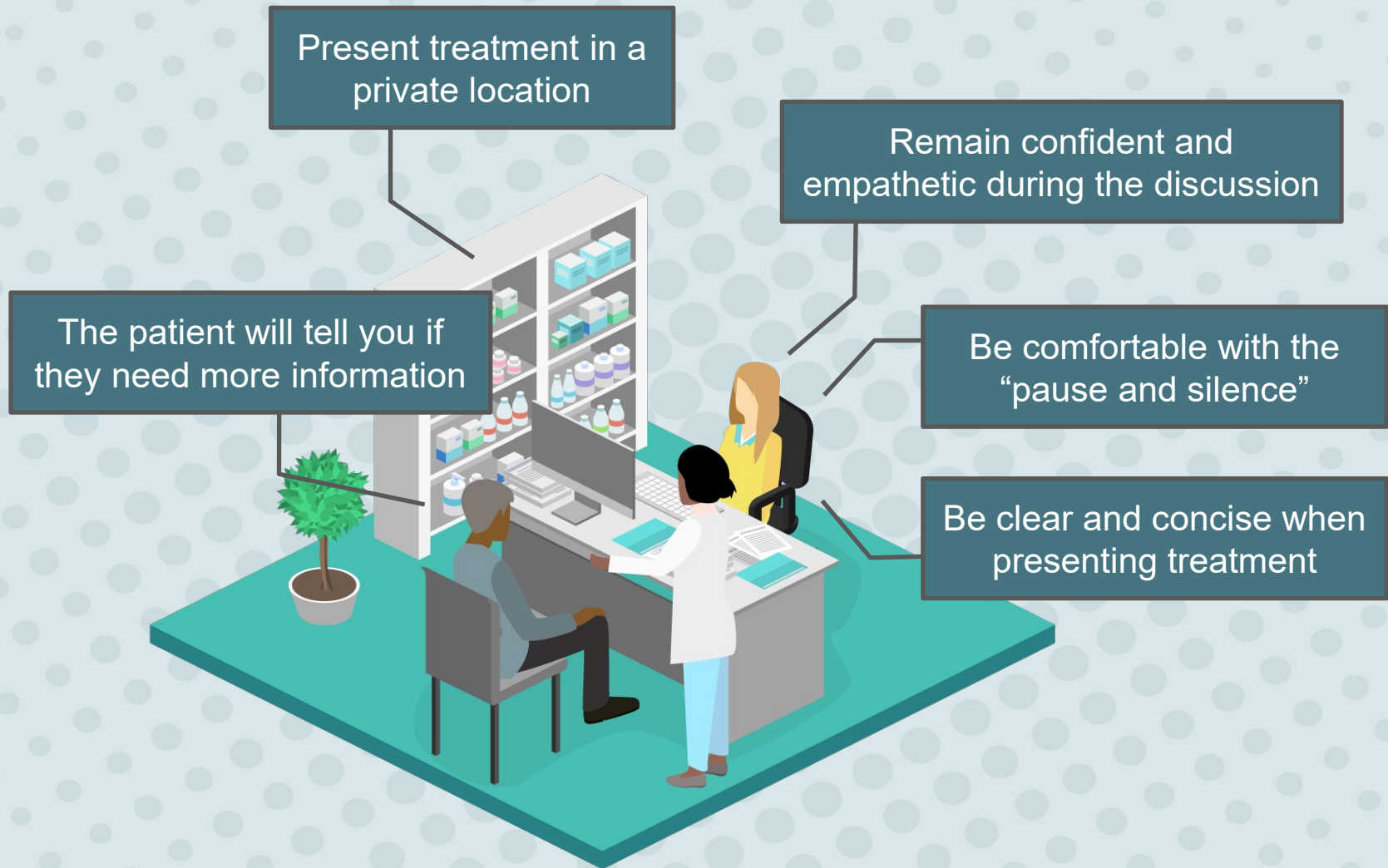
Ops: Begin Pulling Coverage

Fill out Cover Sheet to prepare for presentation

4

Ops: Review and Print the Treatment Plan
Finalize Cover Sheet

Presenting the Plan



The Financial – Documentation



DOCUMENTATION

Print the Treatment Plan from Dentrix

Review and discuss the cover sheet with the patient

Have the patient sign the cover sheet

Give the original cover sheet to the patient, retain the copy for records

Scan the cover sheet and detailed treatment plan into the patient's Document Center in Dentrix

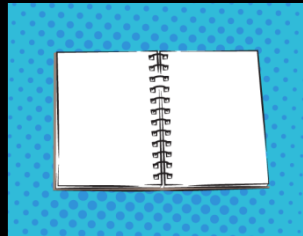
Financial Arrangement Breakdown



GOAL!

Lead the patient to the financial option that allows them to **easily enter into treatment**

The FA



A written financial plan that **fully documents** the treatment plan **accepted by the patient.**

The Presenter



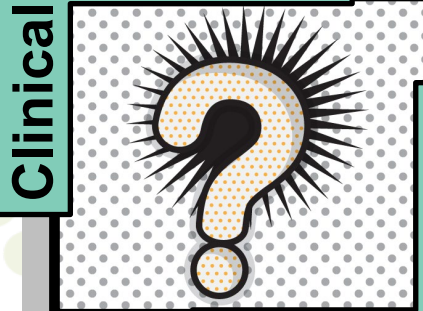
Helps the patient

Set aside



Personal thoughts or beliefs

Questions



Clinical

Answered

Already

SUCCESS



Requires preparation & communication

The Financial – Payment Options



**Pre-pay
or Partial
Pre-Pay**

**Third Party
Financing**

**Pay as
you go**

Co-signer

**Ask Family
for Help**

**Re-sequence
or Alternate
Treatment**

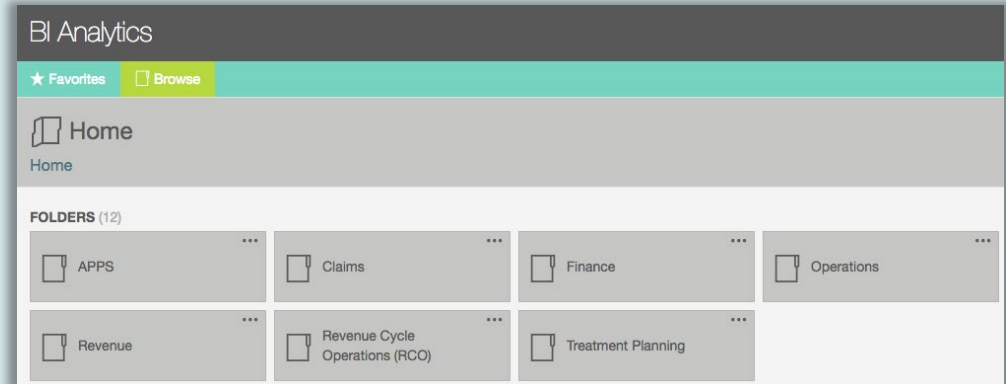
**Refer
out**

The Follow Up



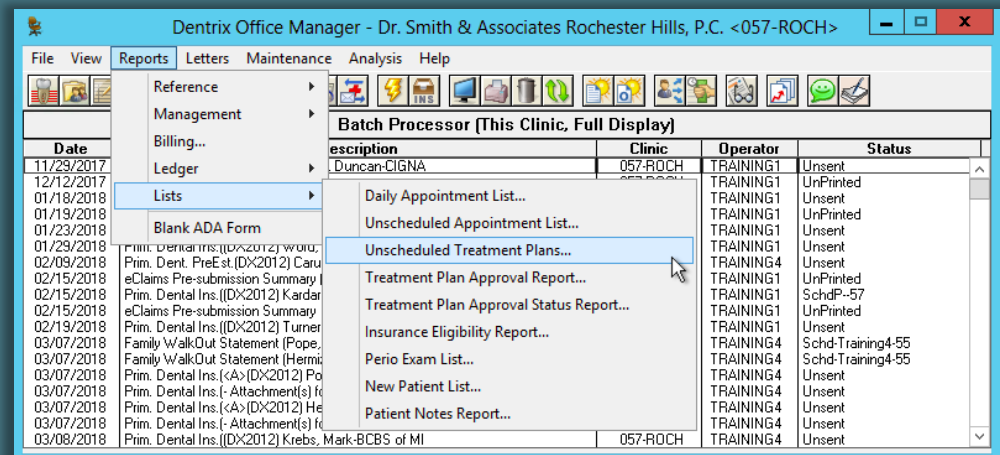
Treatment Acceptance

Open Treatment Planning
in the BI Analytics tool



Unscheduled Treatment

Use the *Unscheduled Treatment Plans* report in Dentrix to call patients and encourage them to schedule treatment



Treatment Tickler System Used when you need to manually track and call patients

End of Sample