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!

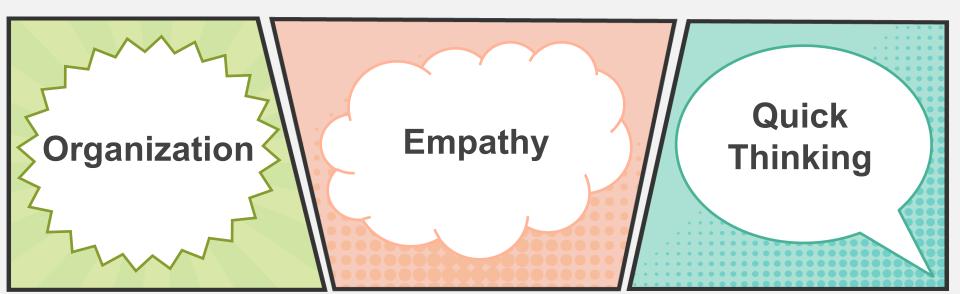
Clinical staff and administrative staff must remain in communication at all times.

Record all details of the treatment plan in Dentrix.

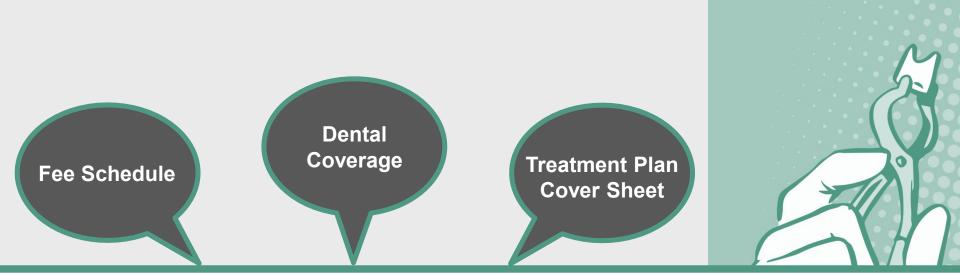




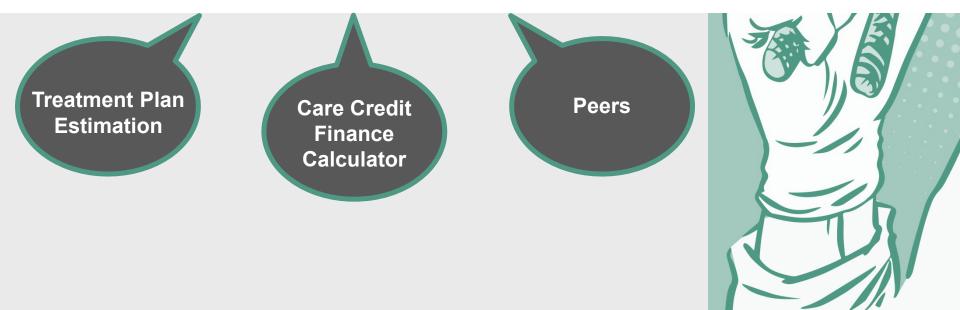
Qualities that support a strong treatment plan presentation



Tools



Tools used for accurate treatment plan presentation



Treatment Plan Phases

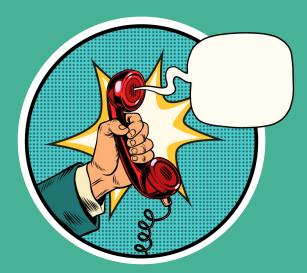
The Exam



The Financial



The Follow-Up



The Exam



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

> Clinical: Enter Treatment Sequence treatment then send BlueNote when done



Ops: Begin Pulling Coverage Fill out Cover Sheet to prepare for presentation

Ops: Review and Print the Treatment Plan Finalize Cover Sheet

Presenting the Plan



Present treatment in a private location

The patient will tell you if they need more information

Remain confident and <u>empathetic during the discussion</u>

Be comfortable with the "pause and silence"

Be clear and concise when presenting treatment

The Financial – Documentation





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



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

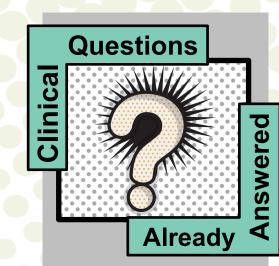
Personal thoughts

or beliefs



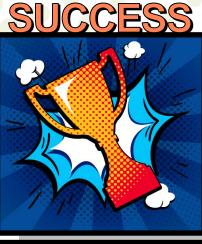


A written financial plan that fully documents the treatment plan accepted by the patient.





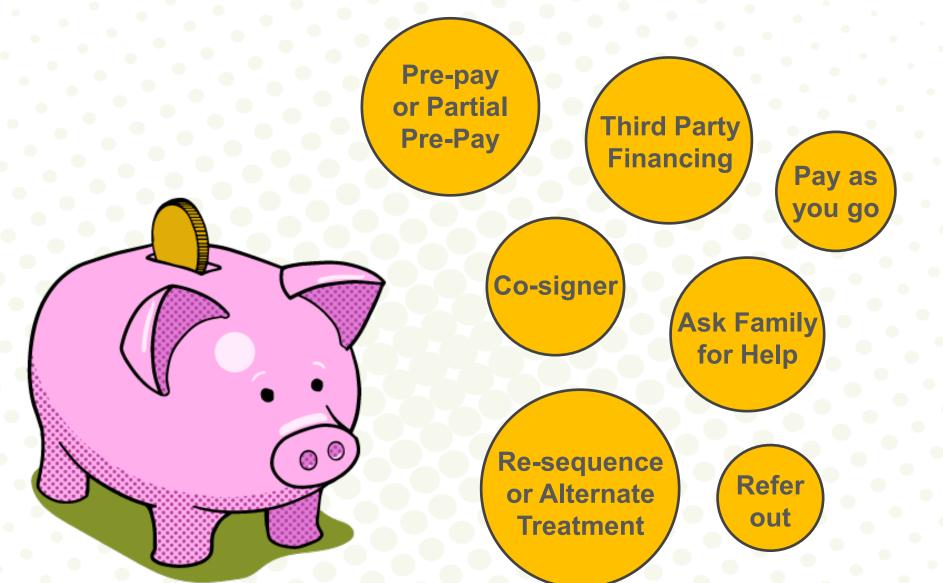
Helps the patient



Requires preparation & communication

The Financial – Payment Options

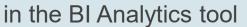




The Follow Up



Treatment Acceptance Open Treatment Planning



BI Analytics			
★ Favorites Browse			
Home Home			
FOLDERS (12)			
APPS	Claims	Finance	··· Operations
Revenue	Revenue Cycle Operations (RCO)	Treatment Planning	

Unscheduled Treatment

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

Dentrix Office Manager - Dr. Smith & Associates Rochester Hills, P.C. <057-ROCH>							
File View Reports Letters Maintenance Analysis Help							
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Treatment Tickler System Used when you need to manually track and call patients

End of Sample