

PLANNED TREATMENT

Utilized when a patient is NOT scheduling at time of appointment for next visit

FROM CHART MODE - STEP 1

SELECT
"PLANNED APPTS"

The screenshot displays a dental software interface for 'Verber Dental Group - Clinic: Verber Family Dentistry {JReynolds} - Vitus, Ginger - 08/05/1985'. The interface includes a menu bar with options like 'Log Off', 'File', 'Setup', 'Lists', 'Reports', 'Tools', 'Clinics', 'eServices', 'Alerts (0)', and 'Help'. Below the menu bar is a toolbar with various icons for patient selection, communication, and charting. The main area shows a 3D tooth chart with 16 numbered teeth. A yellow highlight is on tooth 11. A 'Planned Appointments' window is open on the right, showing a table with columns for '#', 'Min', 'Procedures', 'Note', and 'DateSched'. The window also has buttons for '+ Add', 'X Delete', 'Pinboard', and arrows for moving appointments, along with checkboxes for 'Done' and 'Show Completed'.

Verber Dental Group - Clinic: Verber Family Dentistry {JReynolds} - Vitus, Ginger - 08/05/1985

Log Off File Setup Lists Reports Tools Clinics eServices Alerts (0) Help

Select Patient Commlog E-mail WebMail Text Letter Forms Tasks Label Popsups Dexis

New Rx eRx LabCase Perio Chart Ortho Chart Consent Tooth Chart Exam Sheet CCD Layout XVWeb Dexis XVCapture EZDent-i

Enter Treatment Missing/Primary Movements **Planned Appts** Show Draw

+ Add X Delete Pinboard ↑ ↓ Done Show Completed

#	Min	Procedures	Note	DateSched
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ADD PROCEDURES- STEP 2

SELECT
+ ADD

Family Dentistry {JReynolds} - Vitus, Ginger - 08/05/1985

eServices Alerts (0) Help

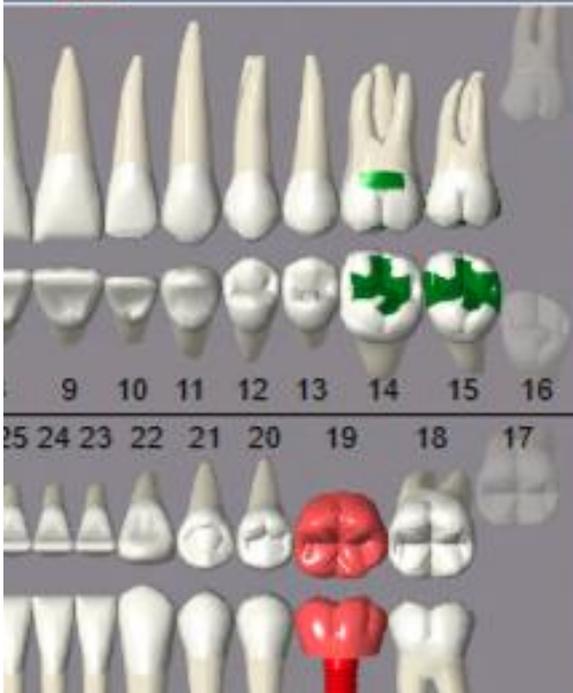
E-mail WebMail Text Letter Forms Tasks Label Popups Dexis

Perio Chart Ortho Chart Consent Tooth Chart Exam Sheet CCD Layout XVWeb Dexis XVCapture EZDent-i

Enter Treatment Missing/Primary Movements **Planned Appts** Show Draw

+ Add X Delete Pinboard ↑ ↓ Done Show Completed

Planned Appointments				
#	Min	Procedures	Note	DateSched



ADDING THE PLANNED TX- STEP 3

Select tx, assign provider and length of appt

The screenshot displays the 'Edit Planned Appointment - Ginger Vitus' window. The patient information is as follows:

Patient Info	
First Name	Ginger
Last Name	Vitus
Middle Initial	
Birthdate	8/5/1985
Home Phone	
Work Phone	
Wireless Phone	(123)867-5309
Credit Type	
Billing Type	Standard Account
Total Balance	0.00
Address and Phone	
Notes	
Family Balance	0.00
Site	
Est. Patient Portion	2167.00
Fee This Appt	2167.00

Appointment Scheduling Options:

- ASAP:
- Unscheduled Status: none
- Confirmed: Unconfirmed
- New Patient:
- Clinic: None
- Provider: VDG
- Hygienist: None
- Is Hygiene: (use hyg color)
- Assistant: none
- Time Locked:
- Color: none
- Appointment Type: None
- Time Ask To Arrive:
- Time Arrived:
- Time Seated:
- Time Dismissed:

Procedures on this Appointment:

Stat	Priority	Tth	Surf	Code	Description	Fee
TP				D9950	occlusion analysis - mounted case	175.00
TP				D9999	unspecified adjunctive procedure, by report	225.00
TP				EVAL	EVAL	0.00
TP				VERTru eOHS	VERTTrue Oral Health Screening	0.00
TP		19		D0012	Cement crown, new	0.00
TP		19		D0220	(scheduled appt) intraoral - periapical first radiographic image	32.00
TP		19		D0220	intraoral - periapical first radiographic image	32.00
TP		19		D0220	intraoral - periapical first radiographic image	32.00
TP		19		D0220	(scheduled appt) intraoral - periapical first radiographic image	32.00
TP		19		D6010	(scheduled appt) surgical placement of implant body: endosteal implant	1900.00
TP		19		D6057	(scheduled appt) custom fabricated abutment - includes placement	819.00
TP		19		D6058	abutment supported porcelain/ceramic crown	1261.00
TP		19		D6190	radiographic/surgical implant index, by report	657.00
TP		19		D7953	bone replacement graft for ridge preservation - per site	672.00
TP		19		TORQ	Torque Check	0.00
TP		30	MO	D2392	resin-based composite - two surfaces, posterior	234.00

Insurance Information:

- InsPlan 1: Blue Cross Dental ***
- InsPlan 2:

Communications Log - Appointment Scheduling:

DateTime	Description
12/21/2021	testing, testing, SF

THIS IS HOW IT WILL APPEAR IN CHART MODE- STEP 4

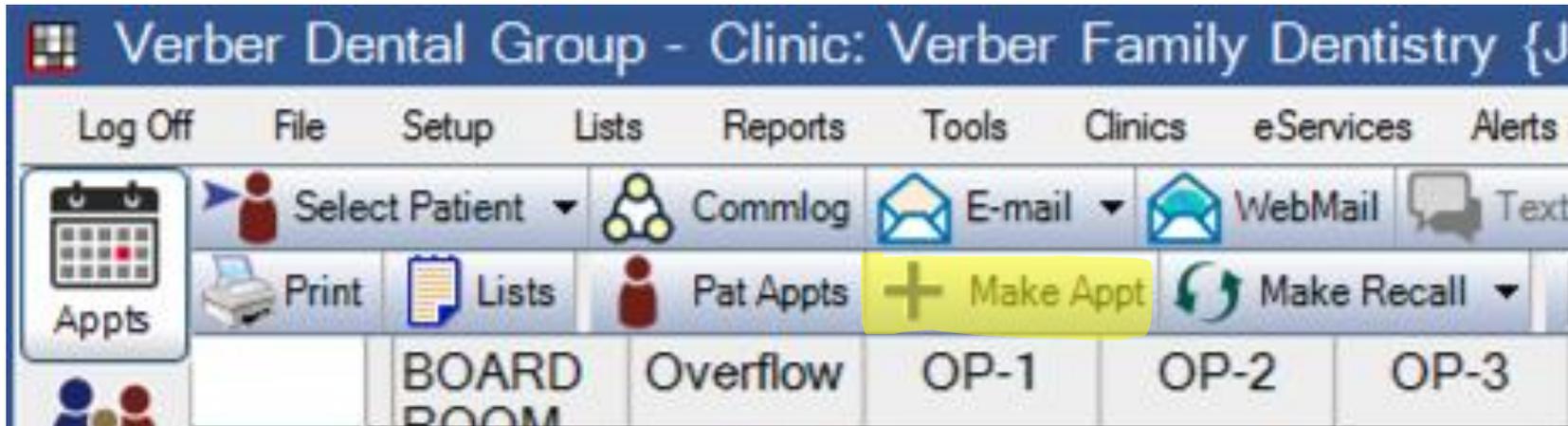
The screenshot displays a dental software interface for 'Verber Dental Group - Clinic: Verber Family Dentistry {JReynolds} - Vitus, Ginger - 08/05/1985'. The interface includes a menu bar, a toolbar with various icons, and a central workspace. On the left, there is a vertical sidebar with icons for 'Family', 'Account', 'Tx Plan', 'Chart', 'Imaging', and 'Manage'. The main workspace shows a 3D tooth chart with teeth numbered 1 through 16. A 'Planned Appointments' window is open, displaying a table with columns for '#', 'Min', 'Procedures', 'Note', and 'DateSched'. Below this window, a 'View All' table shows a list of appointments with columns for 'Date', 'Th', 'Surf', 'Dx', 'Description', 'Sta', 'Prov', 'Amount', 'Proc Code', 'User', and 'Signed'.

#	Min	Procedures	Note	DateSched
1	70	#19-ICROWN, #19-SG @ XO, #30-MO-CP 2P		

Date	Th	Surf	Dx	Description	Sta	Prov	Amount	Proc Code	User	Signed
08/10/2022				prophylaxis - adult	TP	VDG	92.00	D1110		
08/22/2022				PLANNED Appointment #19-ICROWN, #19-SG @ XO, #30-MO-CP 2P						

SCHEDULING PLANNED TX WHEN PT CALLS- STEP 5

Go to Appt. Screen/Make Appt.



SCHEDULING PLANNED TX CONT.- STEP 6

Hi light tx, place on pinboard. This will remove from the planned tx list. Planned tx, doctor and length will all be correct!

Recall for Family

Family Member	Age	Gender	Due Date	Scheduled
Ginger Vitus	37	Female		
'Vin' Vincent Eers	41	Male		03/28/2023
'Root' Rudy Canals	16	Male		
Peny Ohh	5	Male		08/01/2023

Appointment Module Note: Shannon prefers Ria. SF

Family Urgent Financial Notes

Planned Appt Done Show Completed Planned Appts

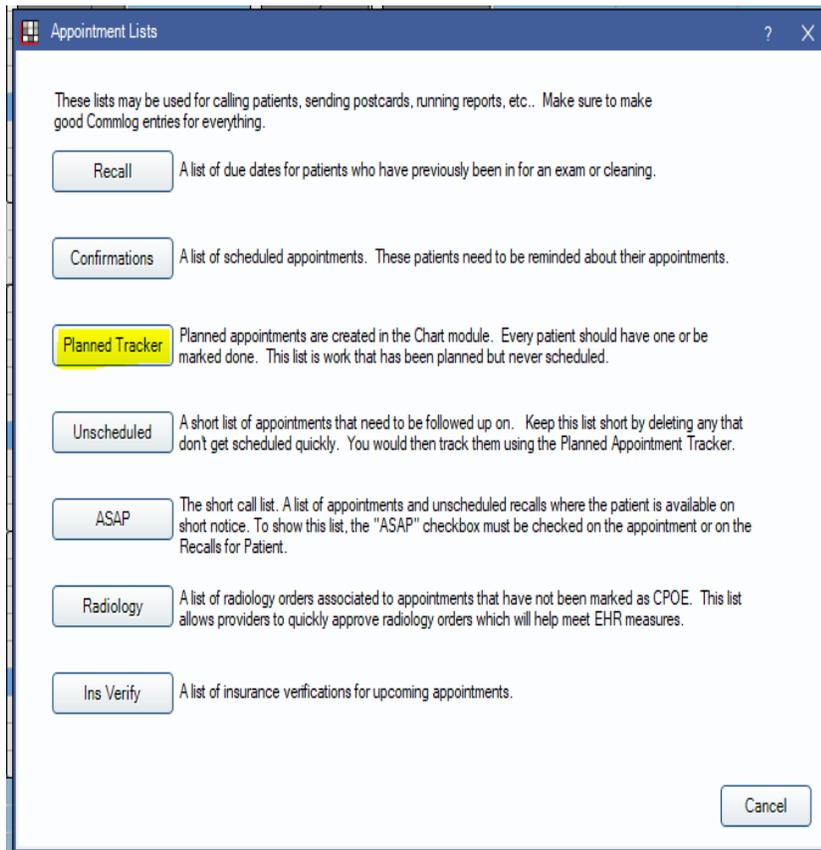
Appointments for Patient

Appt Status	Prov	Clinic	Date	Time	Min	Procedures	Notes
UnschedList	DR14	Dental Specialty Center of PA			90	DeepSed15, #19-PA Xray, #19-IMPLANT, #19-IABUT	
UnschedList	DR21	Dental Specialty Center of PA			40	Charting, DeepSed15, GeneralAnes/Inc15min, #19-PA Xray	
UnschedList	VDG	Noll Family Dentistry			60	EXAM, PROPHY	
Planned #1	VDG				70	#19-ICROWN, #19-SG @ XO, #30-MO-CP 2P	

Buttons: Go To Appt, Copy To Pinboard, Schedule Recall, NOTE for Patient, Create New Appt, Close



THINGS TO REMEMBER



1. Make sure to assign provider and length of appointment
2. When scheduling make sure you are selecting the planned tx, highlighting and placing on pinboard so it will be removed from the planned tx module
3. If you see tx on the planned tx module that has been completed, make sure to delete it.
4. This will allow TC's to pull a report that is easy to read and provide the doctor with production when needed. It will also eliminate the question of what doctor the patient needs scheduled with and for how long.
5. Clinical notes should **ALWAYS** have "next visit" and length of appointment.