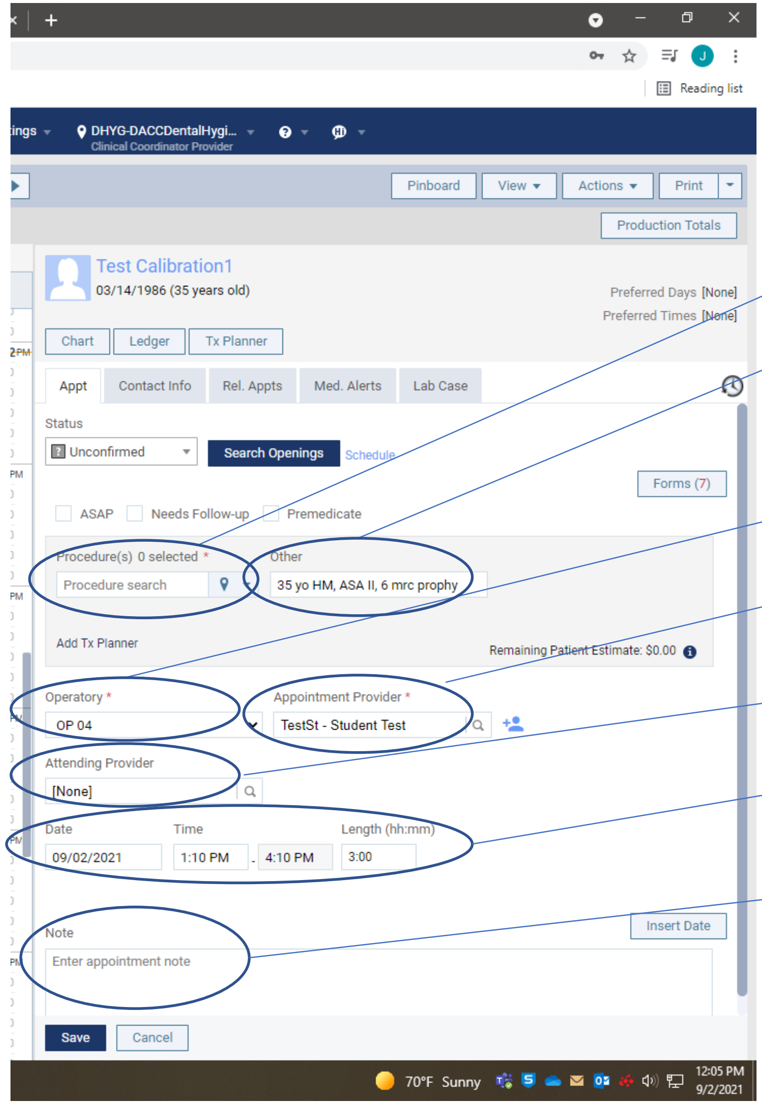
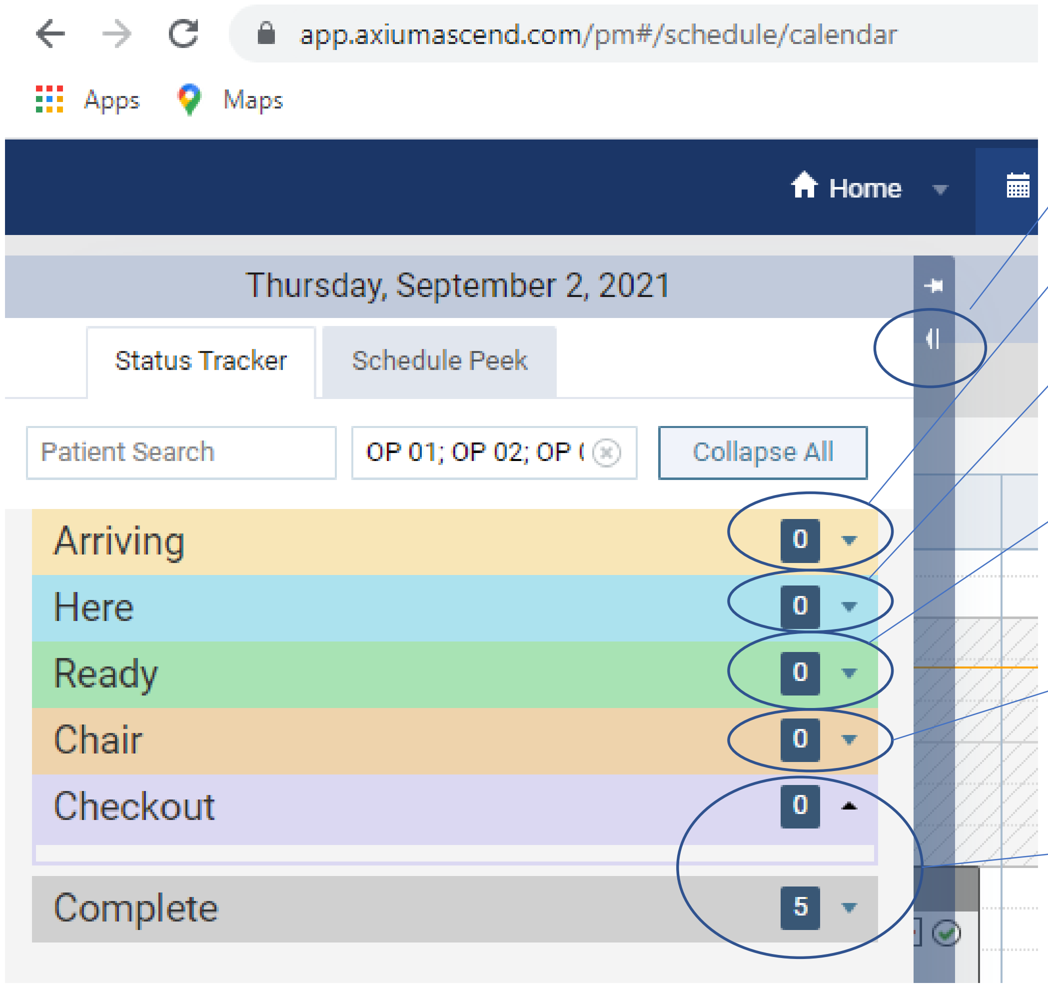
Appointment Flow: How to Schedule, Request Faculty Check, Treatment Plan, and Complete a patient for the day

Step 1: Schedule Appointment



- **Don't** add procedures here.
- **Do** add information to "other"
  - This should be the presentation: Age of patient, race, gender, ASA, and what your doing for the day.
- Make sure your operatory is selected.
- Make sure student seeing patient is the provider.
- **Don't** add attending provider here.
- Make sure correct appointment date and time are selected.
- Under note, add if forms have been sent.

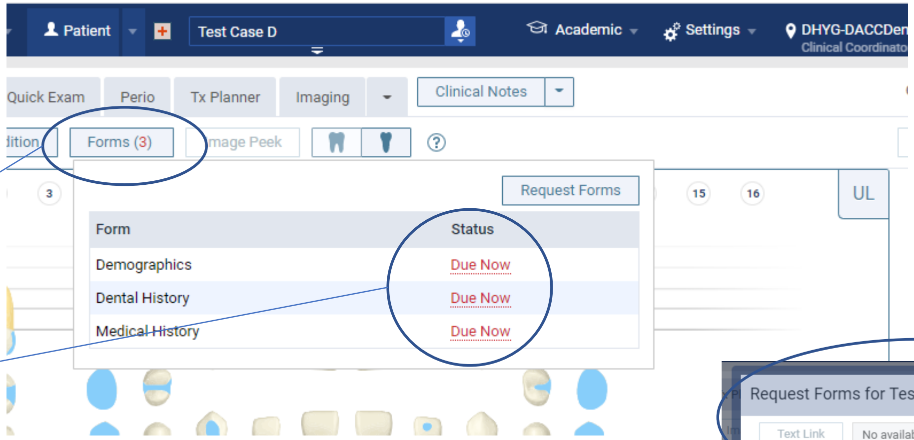
Step 2: Keep status tracker updates



- Click side arrow to open status tracker.
- All scheduled patients will be on the “Arriving” status when the day starts.
- When they arrive, Ms. Guzman will mark them as “Here.”
  - This will let you know that your patient is here, but they need to complete payment, paperwork, etc. and may not be ready to be called back yet.
- When they are ready to be called back, Ms. Guzman will mark them as “Ready.”
  - Do not call your patient back until Ms. Guzman has marked them as ready AND until there are faculty on the floor.
- When you bring them back, mark them as in “chair.”
  - This is where they will stay for the remainder of the appointment.
- Checkout and complete status will be covered later.

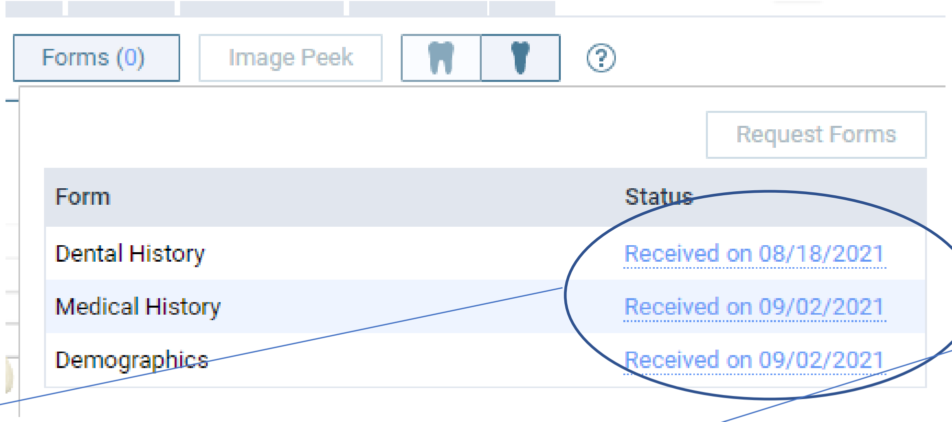
Step 3: Review MHx, DHx, Vitals, and EO/IO

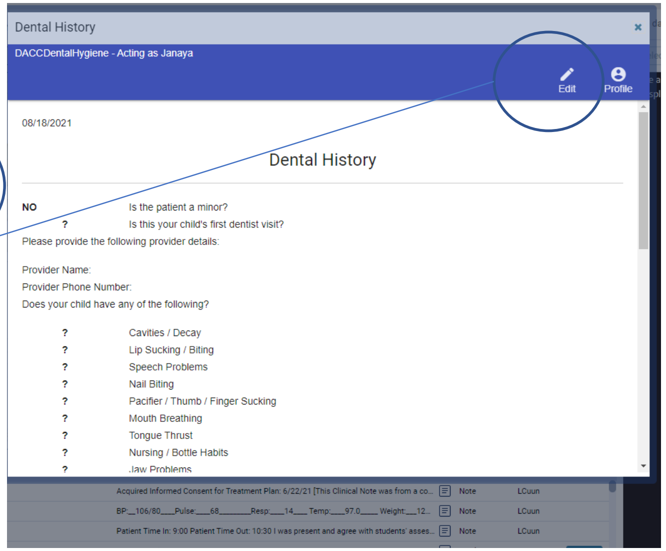
- The patient should have filled out the MHx and DHx forms prior to their appointment.
  - If they didn't: you can help them do it in the chair. Click the patient chart, go to forms, and you'll see what is due now.
  - Click the red "Due Now" on any of the forms.
  - A "Request Forms" screen will come up. If you sent the forms prior, this is how you would have done it (by either texting or emailing the link). Note: to text the link, mobile number has to be selected, not work or home.
  - If you're helping them in the chair, use an iPad to scan the QR code that comes up.
  - You can then have them fill out the forms and help if needed.

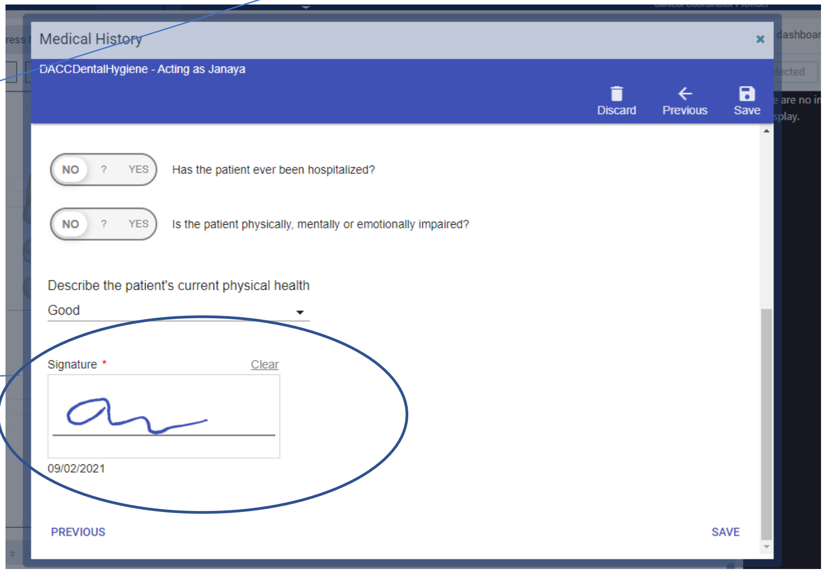


Step 3: Review MHx, DHx, Vitals, and EO/IO

- If the patient did fill out the forms prior, you will just need to review with them for accuracy and updates.
- You will see the date the forms were filled out and received.
- Click the blue “Received on” status and the form will come up.
- You will be able to click the “Edit” button on the top right corner of the form. You need to do this at each appointment to update the MHx and DHx.
- When you finish updating, the patient will sign the update.

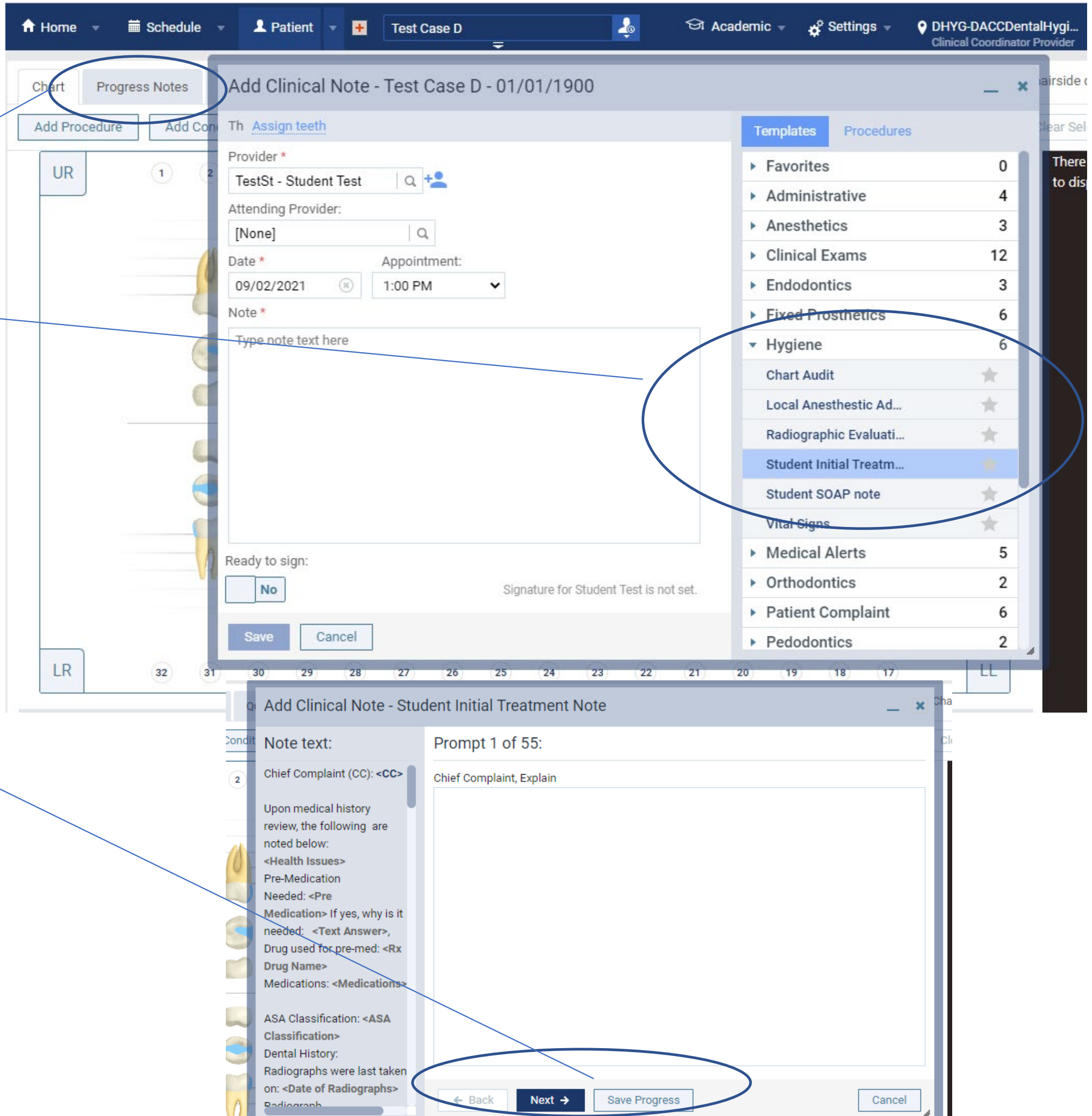






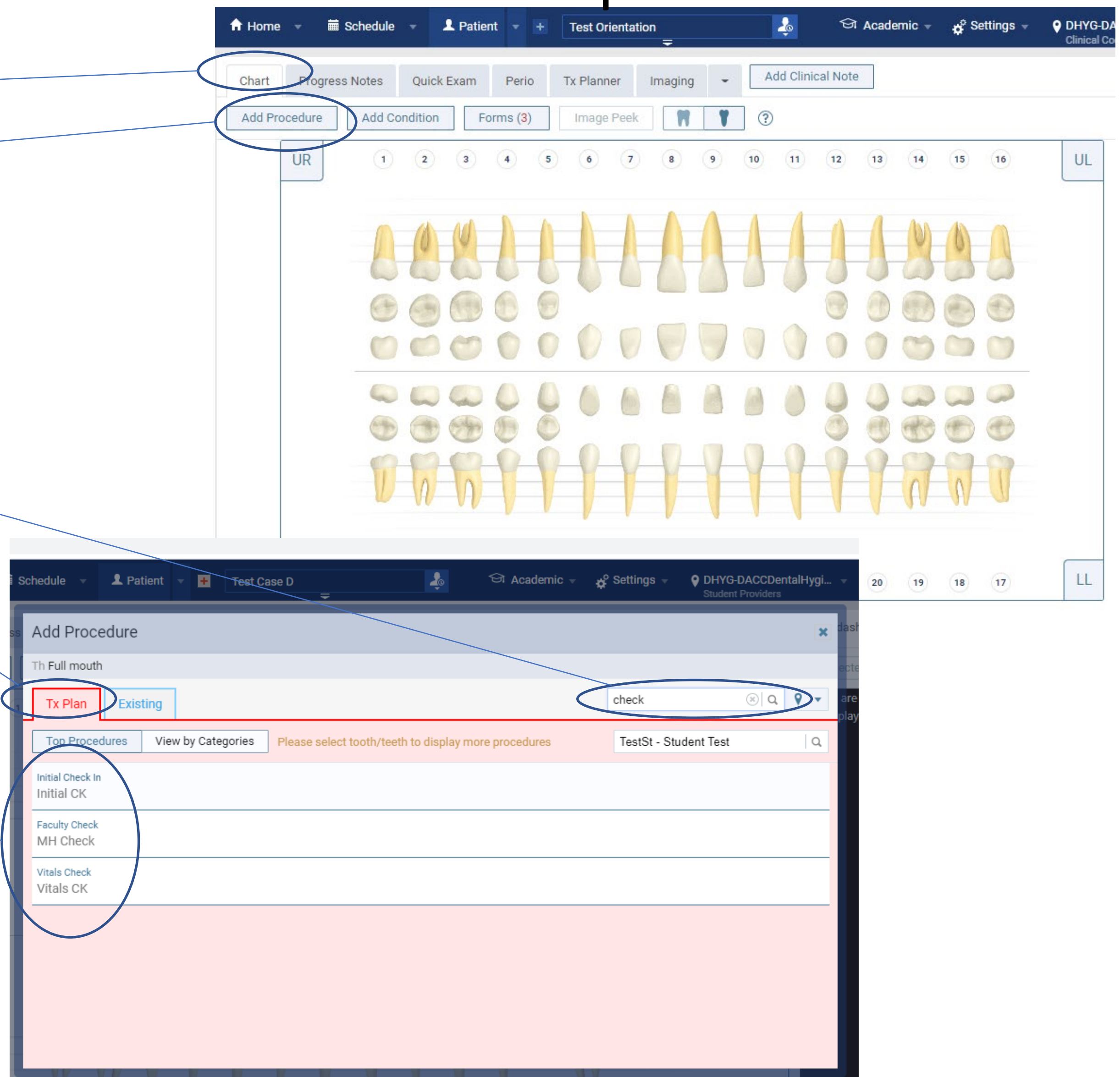
Step 3: Review MHx, DHx, Vitals, and EO/IO

- You will need to select an initial note by clicking on the progress notes tab, and selecting the “Student Initial Treatment” template on the right hand side under Hygiene.
- You will then go through the prompts to do vitals and EO/IO and the rest of the notes; click next as you fill out the note.
- Save your progress frequently.
- Follow the same steps for your SOAP note.



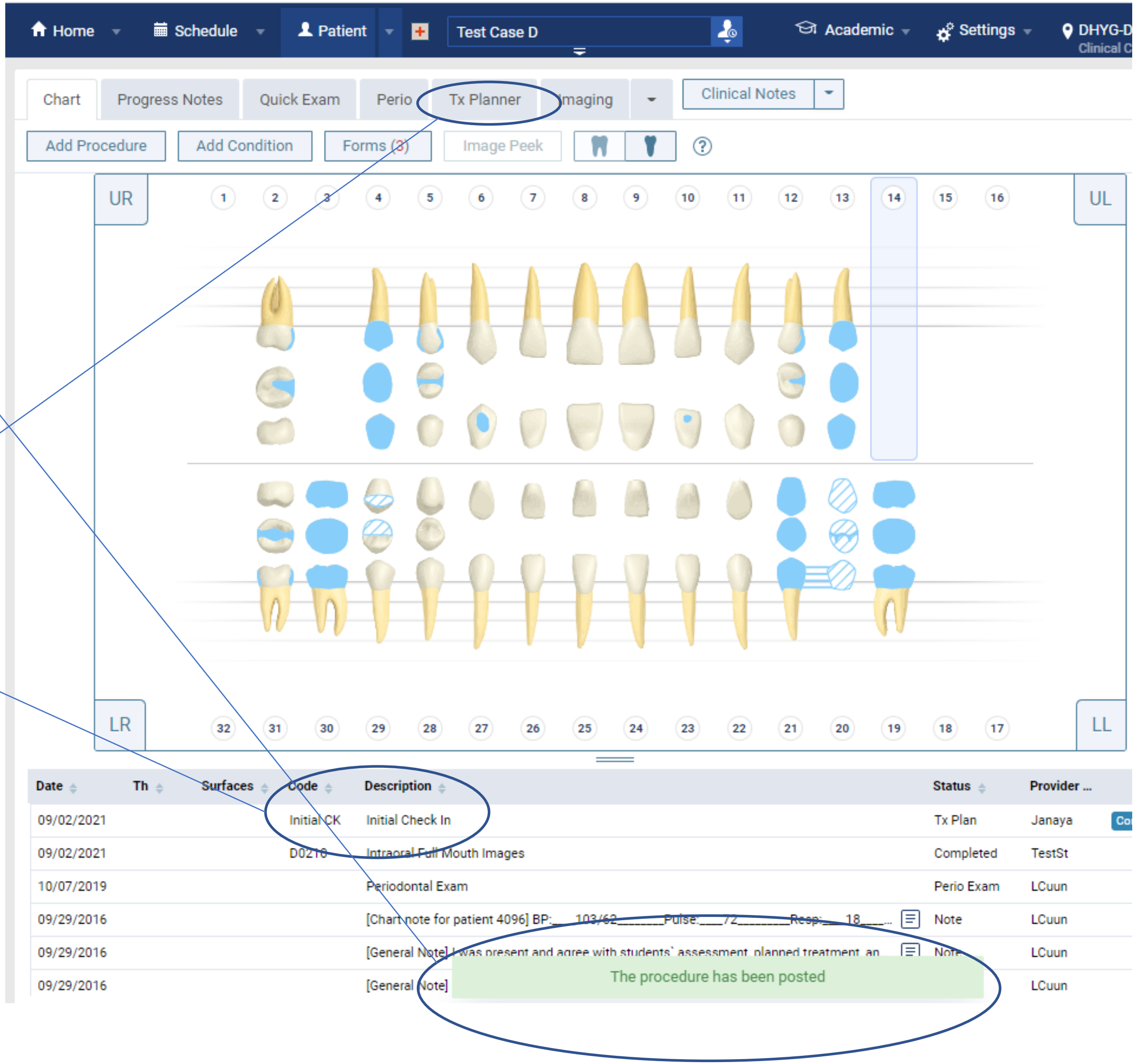
Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- Go to chart
- Click add procedure
- Select Tx Plan
- Search “check”
- You’ll see:
  - Initial Check In
  - Faculty Check
  - Vitals Ck
- Select Initial Check for the 1st check on the day.
- Select Faculty check for any other checks needed that day.
- Vitals check are only needed if vitals are high and need to be double checked by faculty



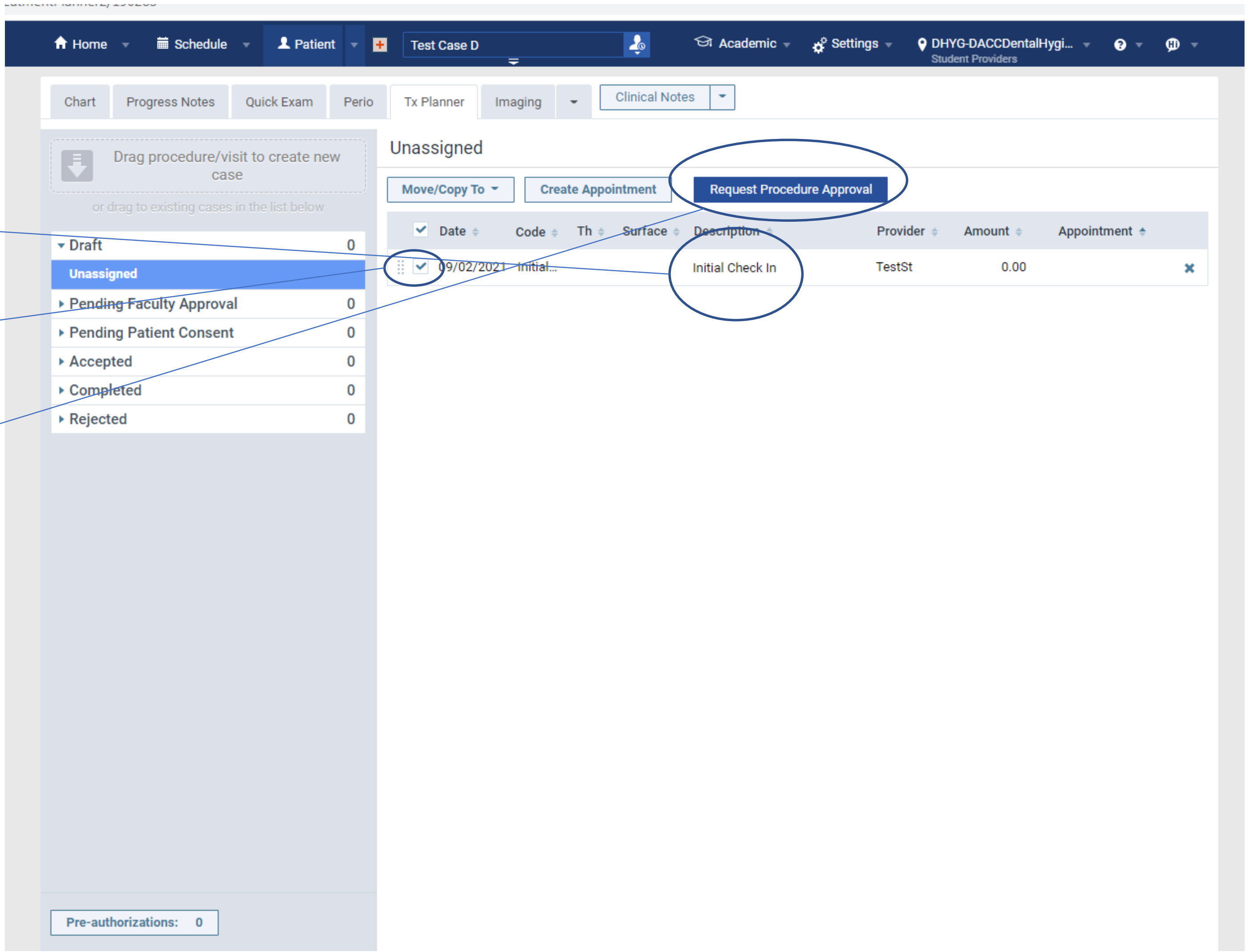
Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- You’ll notice a pop up that says the procedure has been added and you’ll see the procedure under the chart.
- Then click Tx Planner
- This will take you to another screen.



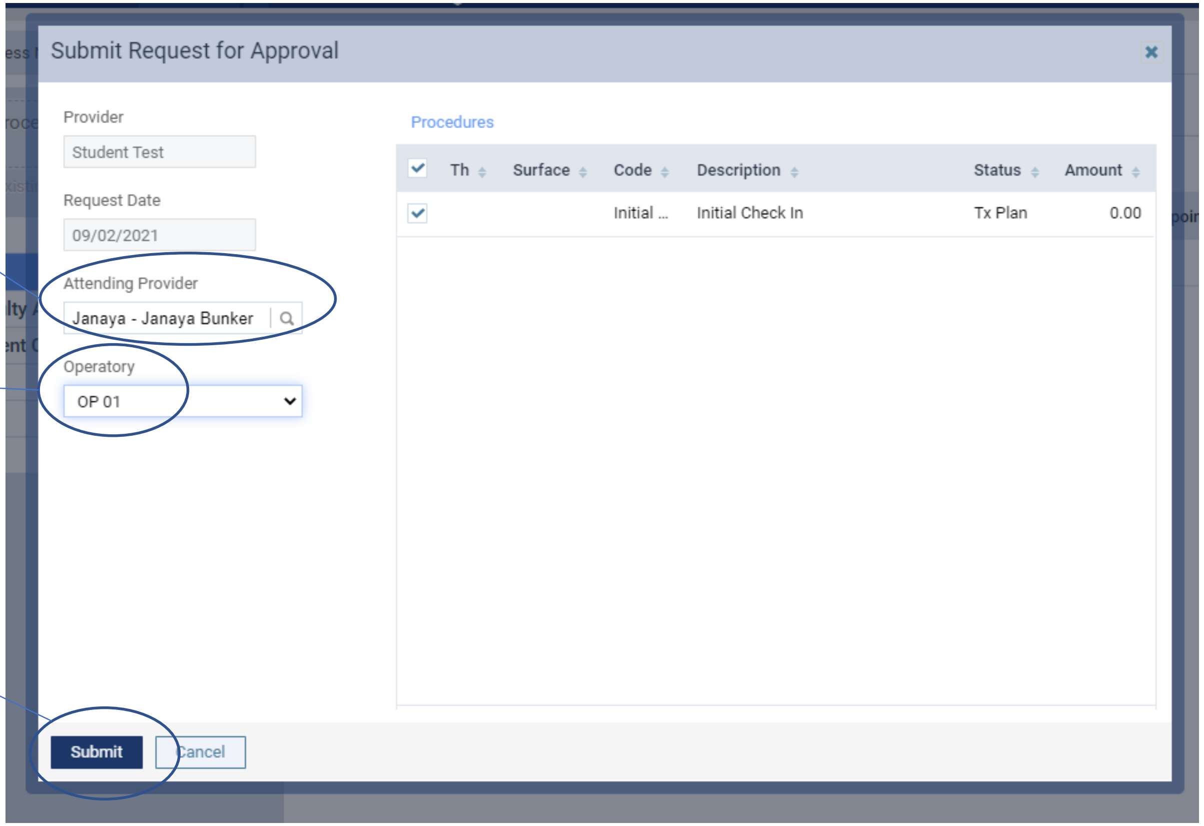
Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- When in the Tx Planner, you will see the procedure.
- Click the box to "Check it."
- Then Click "Request Procedure Approval."
- This will bring another pop up screen.



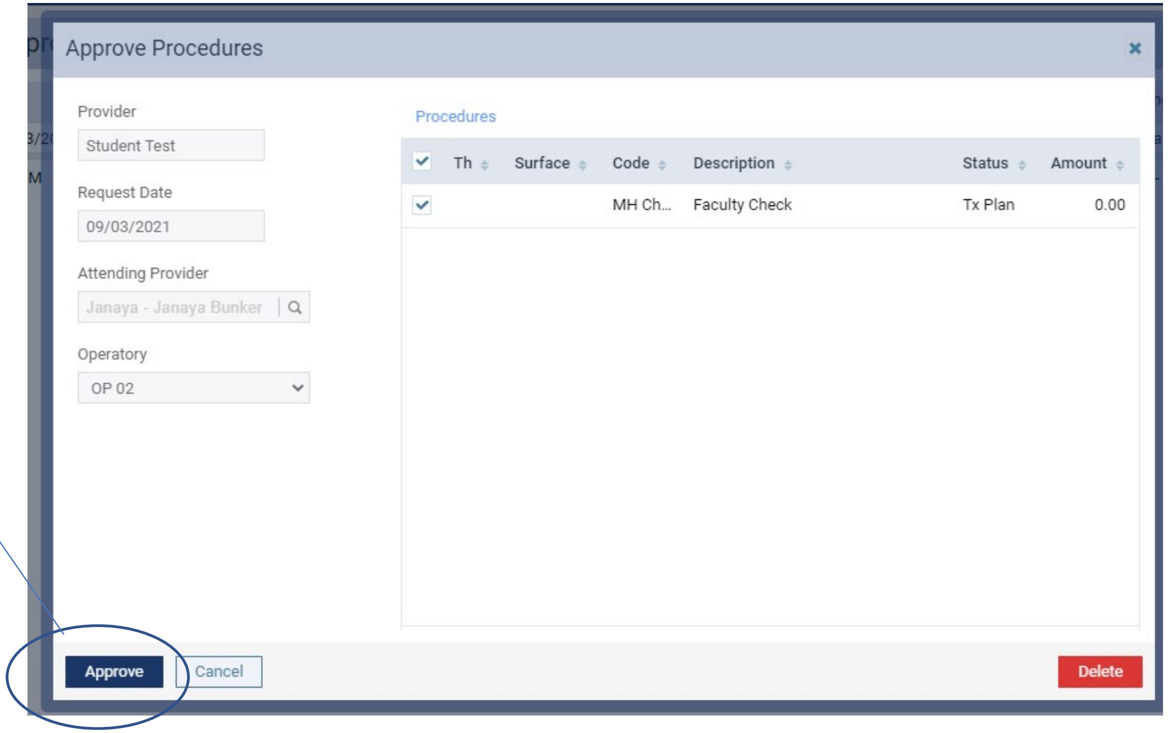
Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

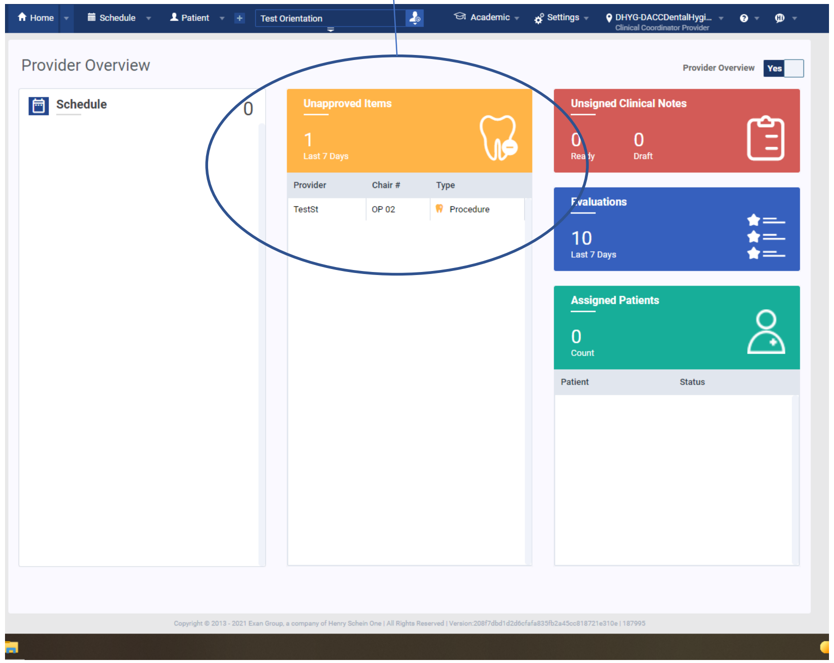
- You will need to search for your faculty under "Attending Provider."
- You will also need to select the operatory you are in.
- Then click submit.
- This will send the faculty a notification that you need a check.

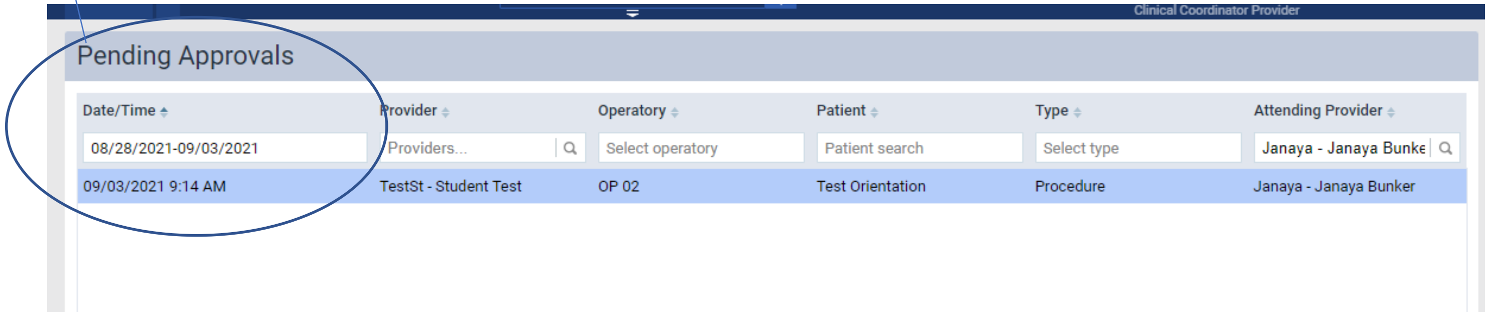


Faculty Note

- Faculty need to Approve “Check Request” in order for students to request another check.
- Faculty can approve the check at their workstation by clicking the notification.
- This will bring up all student pending approvals. Select the one you are ready to approve/check.
- This will bring the last pop up where you can approve.

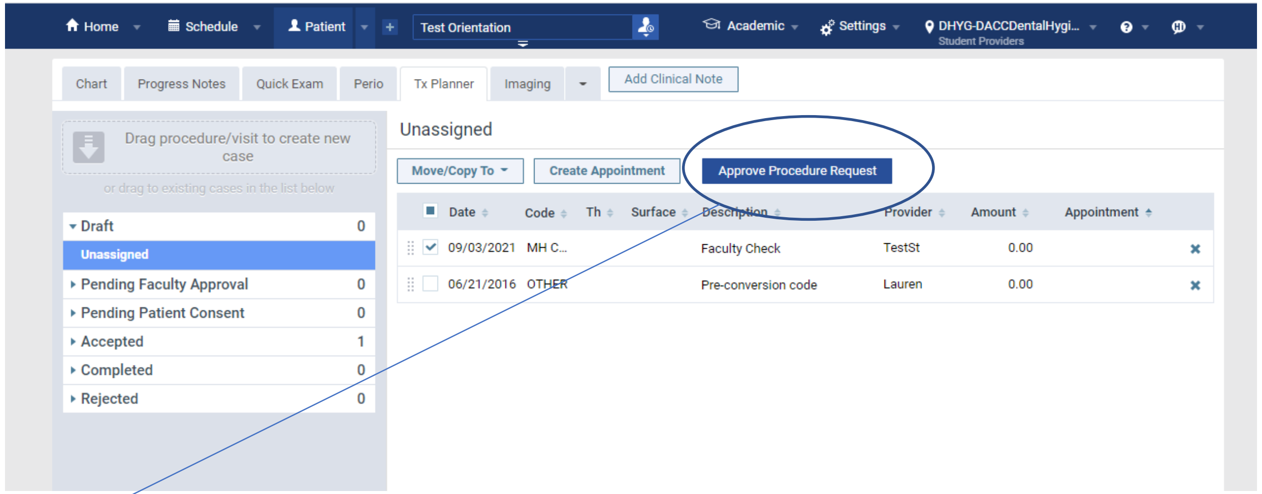


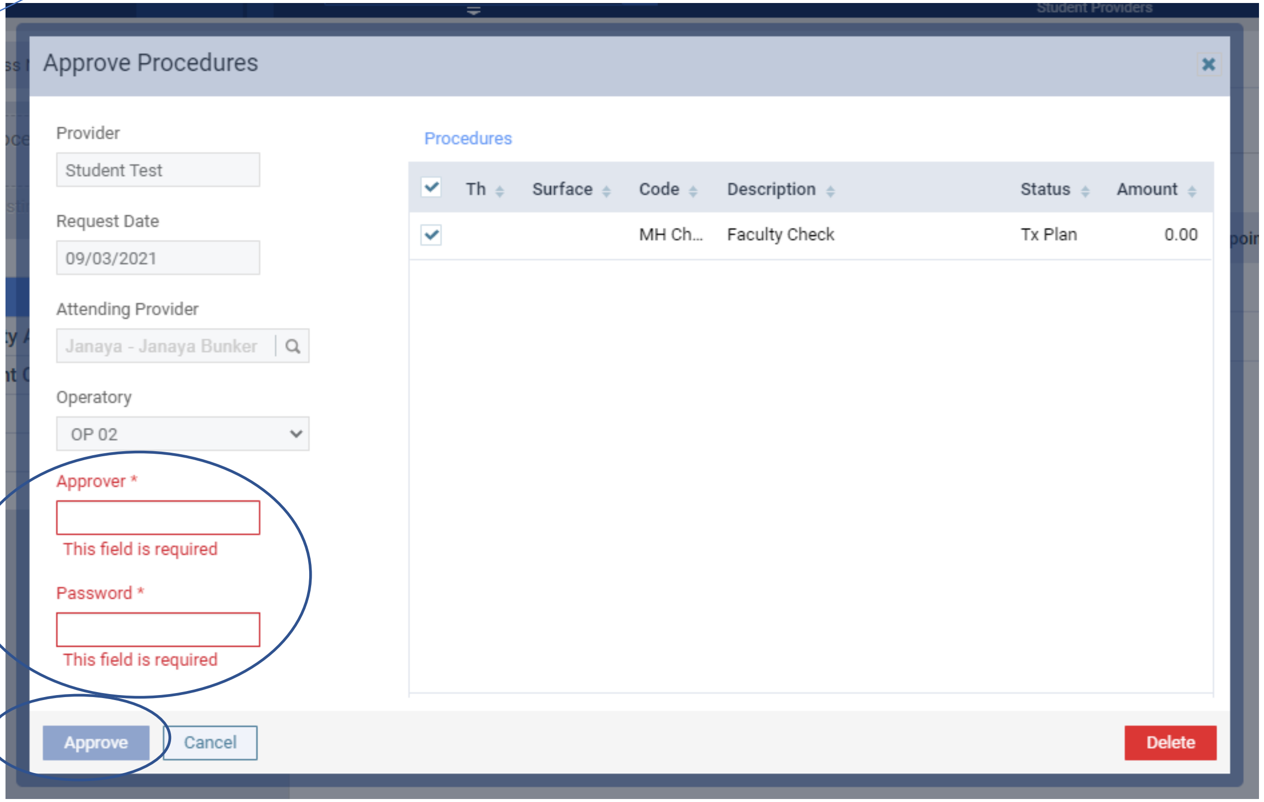




Faculty Note

- Faculty can also approve the check at the student's work station when they go over to do the check.
- On the students computer, faculty can click "Approve Procedure Request."
- This will bring up a prompt to enter the Approvers username and password.
- Once this is entered, click approve.



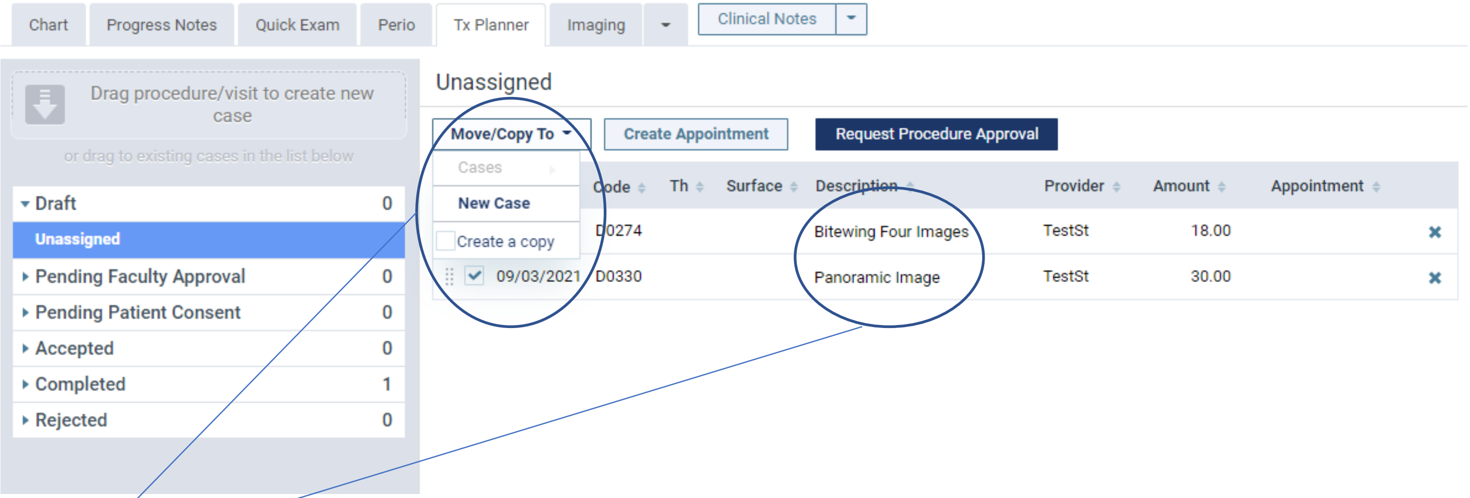


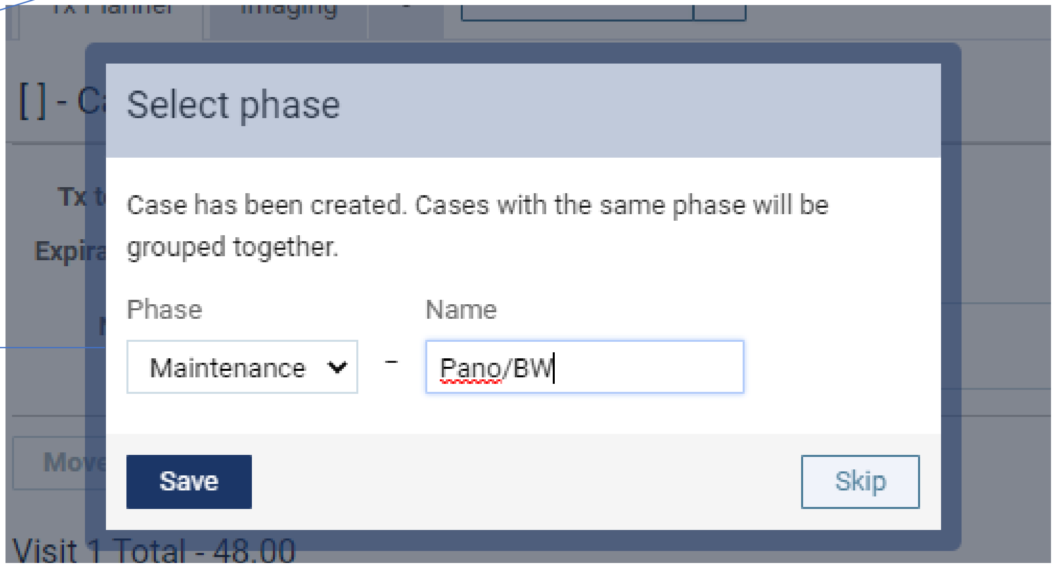
Step 5: Tx Planning

- You need to Tx plan any chargeable procedure/treatment BEFORE the procedure is performed or product dispensed:
  - Radiographs
  - Bleaching trays/sports guards
  - Fluoride
  - Type of cleaning (prophy, perio maintenance, SRP, etc.)
  - Desensitization
  - Arestin
  - Sealants
  - Any products (CHX oral rinse, Prevident, etc.)
- You may have multiple treatment plans for one patient because you may not know the treatment that is needed when radiographs are taken, or a patient may want a product after you have already treatment planned the cleaning. That is okay, just make sure you make a new treatment plan for each additional service if it was not added to the initial treatment plan.
- Treatment plans need to be updated yearly or at each recare if treatment changes.

Step 5: Tx Planning

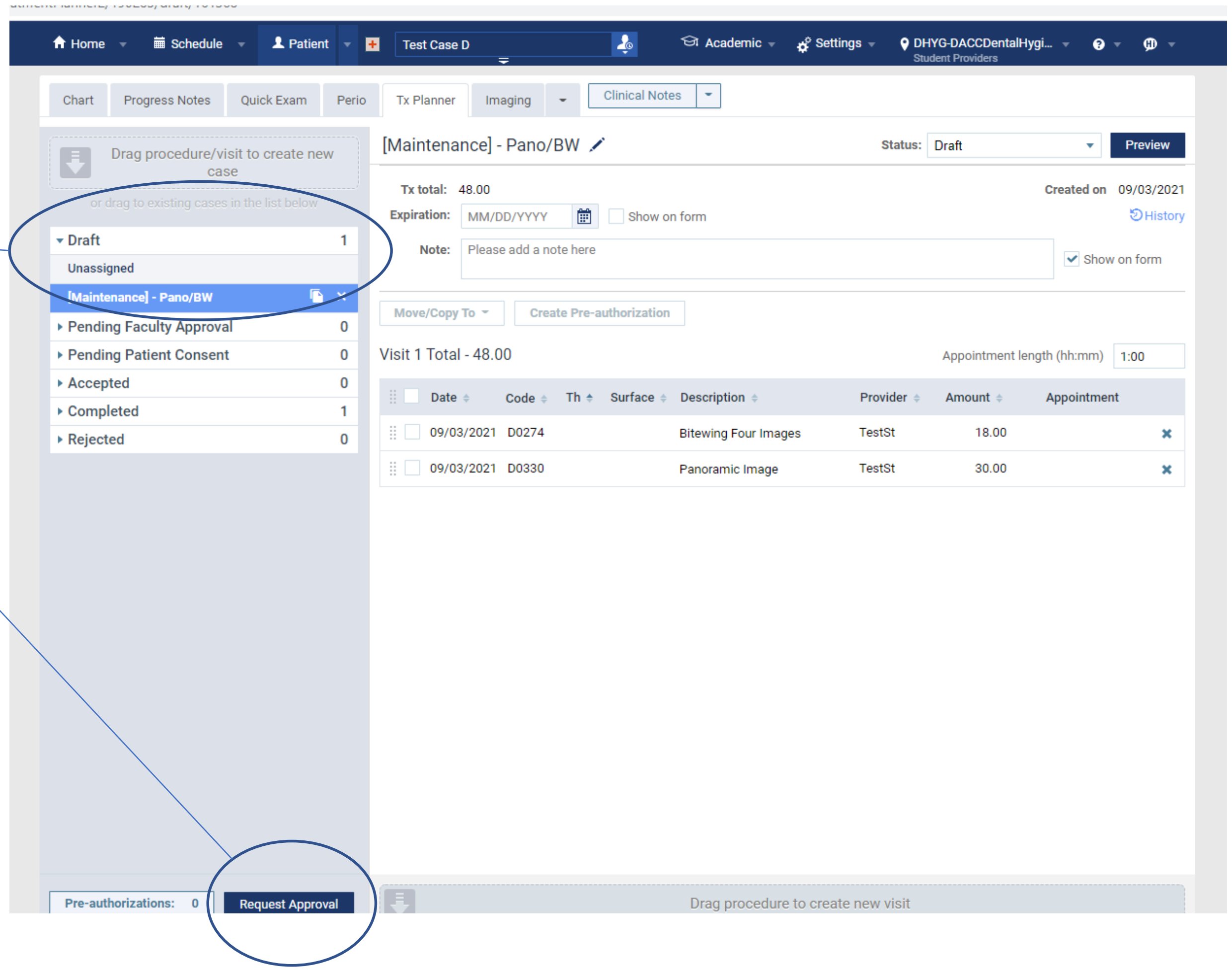
- If a patient needs radiographs, you will need to tx plan them before you take the radiographs and before you treatment plan the type of cleaning (you will not know the type of cleaning needed at this point because you have not finished assessments).
- In the chart, add the radiographs or treatment you will be doing the same way you searched for a faculty check.
- After you add in the treatment, go to the tx planner tab.
- You will see the treatment you added to the chart. You need to check the boxes to select them.
- You will need to click the “Move/Copy To” tab and select “New Case.”
- A pop up will come up asking you to select the Phase (Urgent, Control, Re-Evaluation, Definitive, or Maintenance). You will manly use maintenance.
- Then Name the Phase with the treatment you selected so it’s easy to identify.





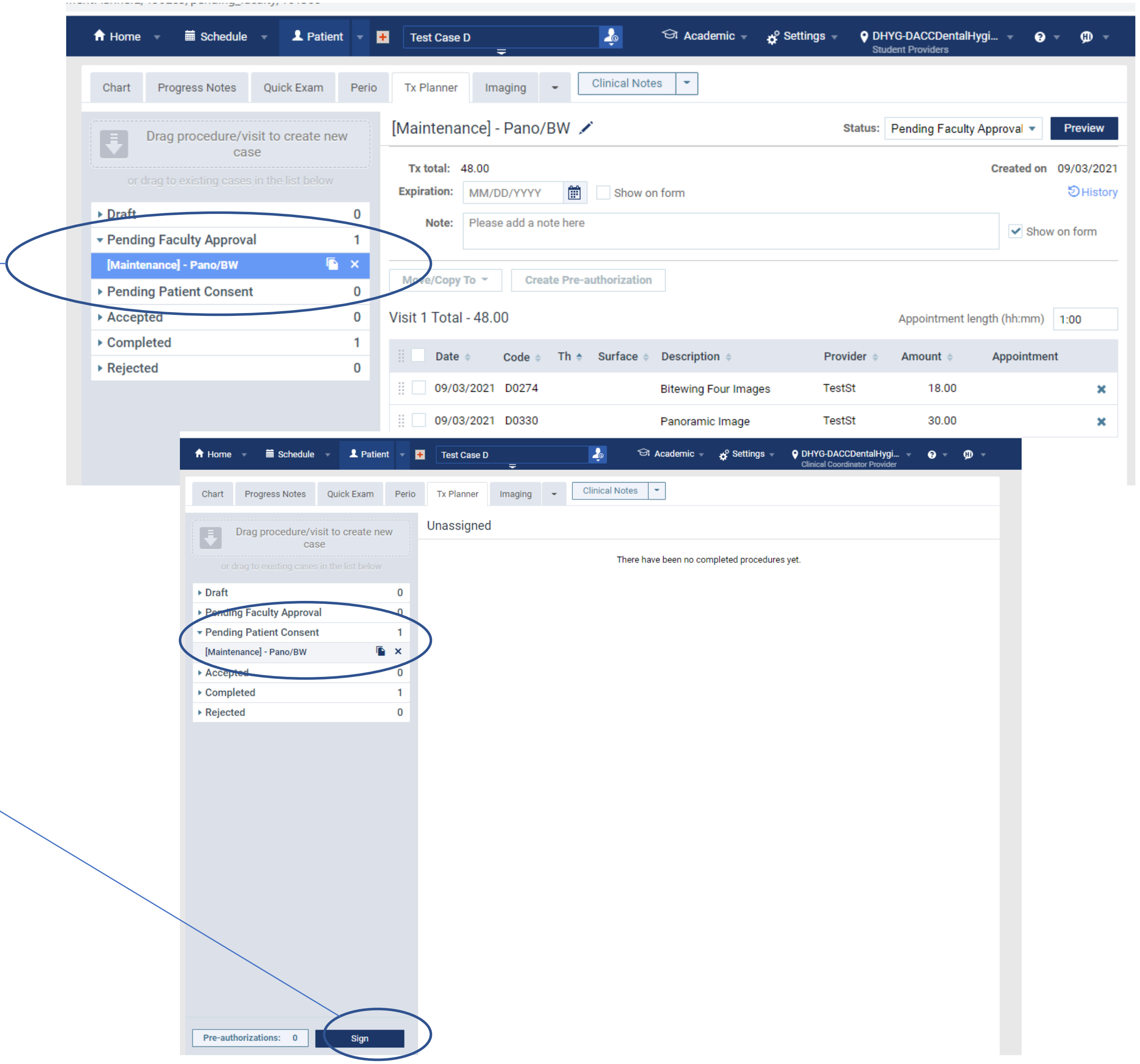
Step 5: Tx Planning

- Once you have created the case, you will see it on the left hand side of the screen under "Draft" as unassigned at this point.
- You then need to click "Request Approval."
- This will send faculty a notification and they can approve from their workstation or yours.



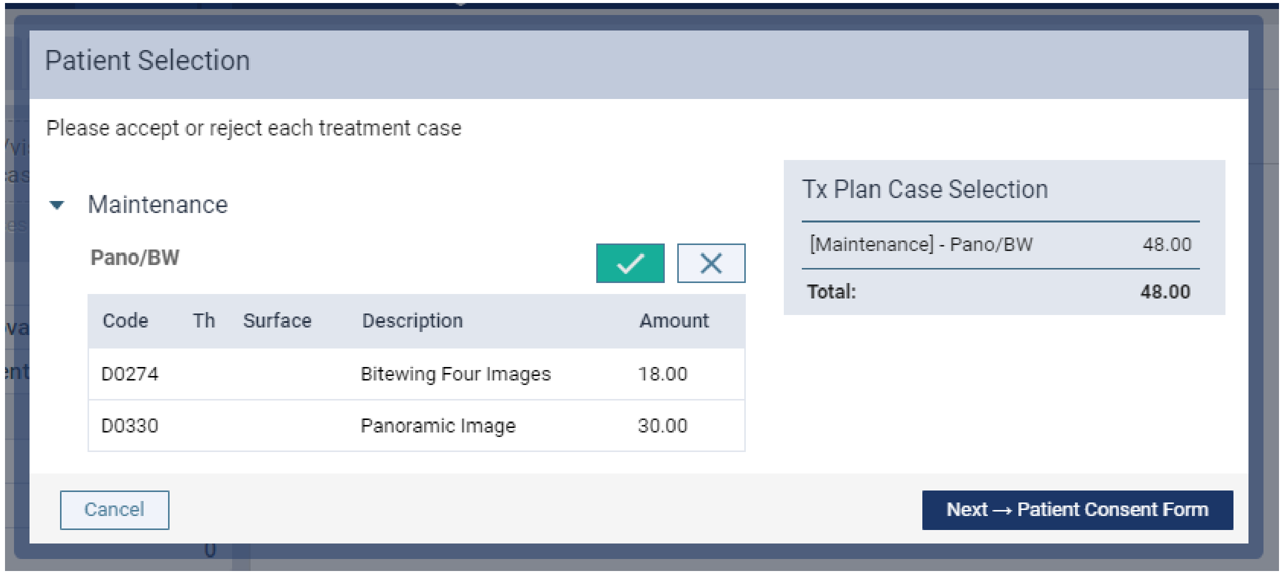
Step 5: Tx Planning

- You will notice the case went from “Draft” to “Pending Faculty Approval.”
- Once faculty approves, the case will move to “Pending Patient Consent.”
- This means the case is now ready for the patient to sign.



Step 5: Tx Planning

- The signing can be done from the faculty or student account. If from the student account, signing will need to be done with the mouse. If from the faculty account, faculty can log into an iPad and take it to the students station for easier patient signing.
- Once "sign" is clicked, a pop up asking to accept or reject the treatment case will come up. If accepting select the "✓" if rejecting, select the "X".
- Please accept and have patient sign all recommended treatment, even if they do not want all that is recommended. For example, this would not be the case for radiographs, but if you recommend fluoride varnish and the patient is against fluoride, accept and have them sign initially, THEN go in and treatment plan fluoride again; alone this time. Go through the same process, but when you get to this screen, reject the treatment and have the patient sign that they rejected.
- This way we will have on record what treatment was recommended and what treatment, if any was declined by the patient. Please explain this process to the patient and why they are signing for both.
- To have the patient sign, click "Next-> Patient Consent Form"



Step 5: Tx Planning

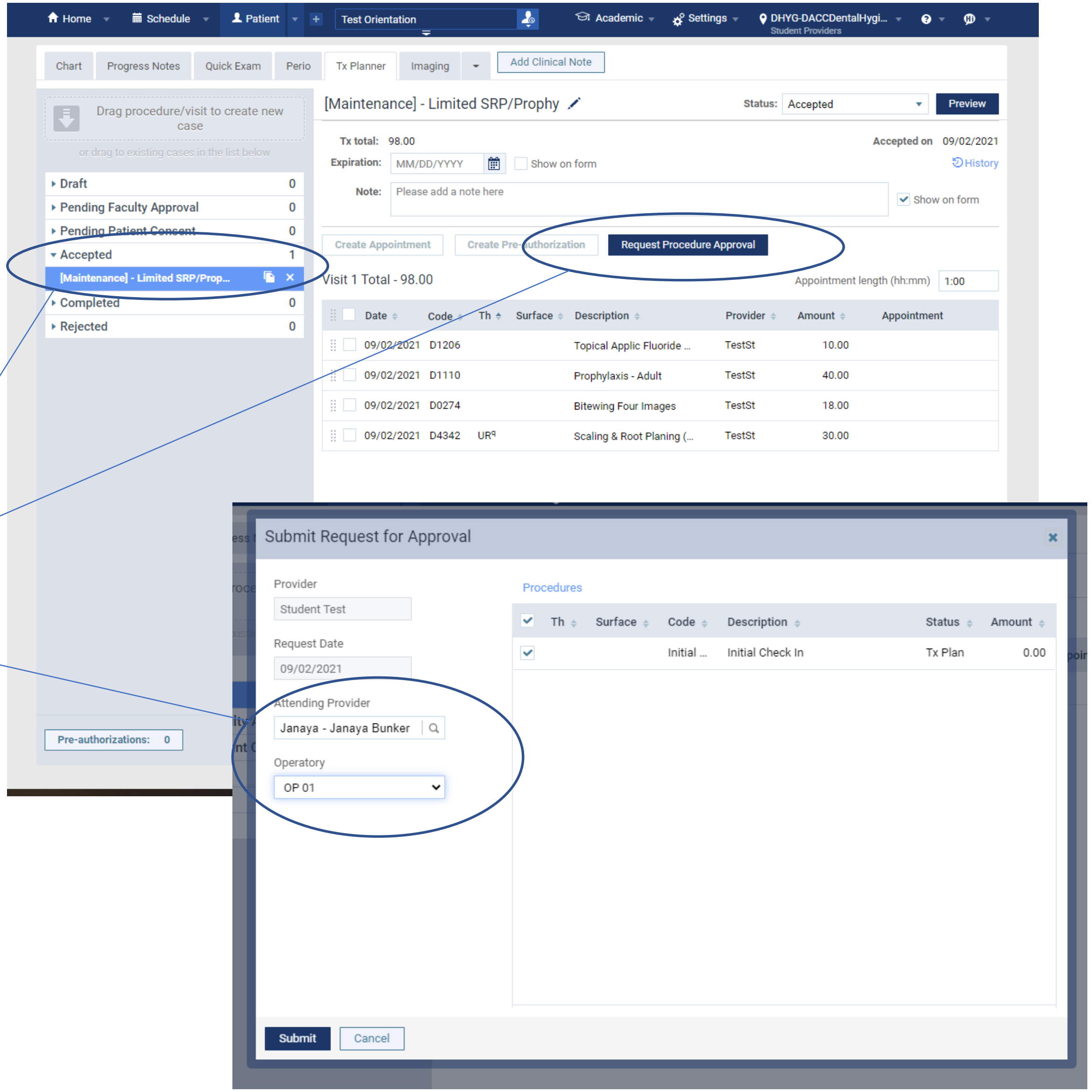
- A consent form will pop up and based on the procedure codes, a pre-written statement will come up stating explanations and risks.
- Once the patient signs, click "Sign and Confirm."
- You will be taken back to the tx planner screen. Notice that the case moved from "Pending Patient Consent" to "Accepted."
- This means faculty gave approval to proceed with treatment and the patient gave consent to treatment, so you may continue.
- You can review the signed treatment consent at any time in the document manager.

Step 6: Checkout

- Once you are done with the appointment, you will need to go through a check-out process.
- It is different depending on:
  - If the treatment in a treatment plan was complete.
  - If a no charge treatment that was not treatment planned was complete.
  - If treatment in a treatment plan is in progress.
  - If only part of the treatment was complete that day.

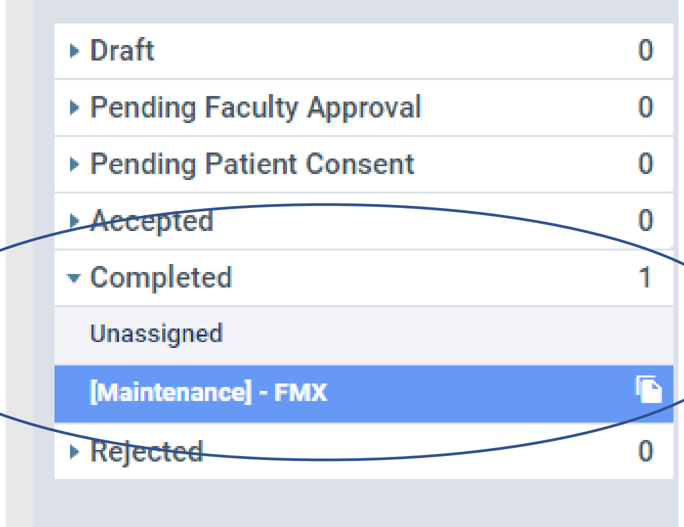
Step 6: Checkout: Tx Planned Procedures Complete

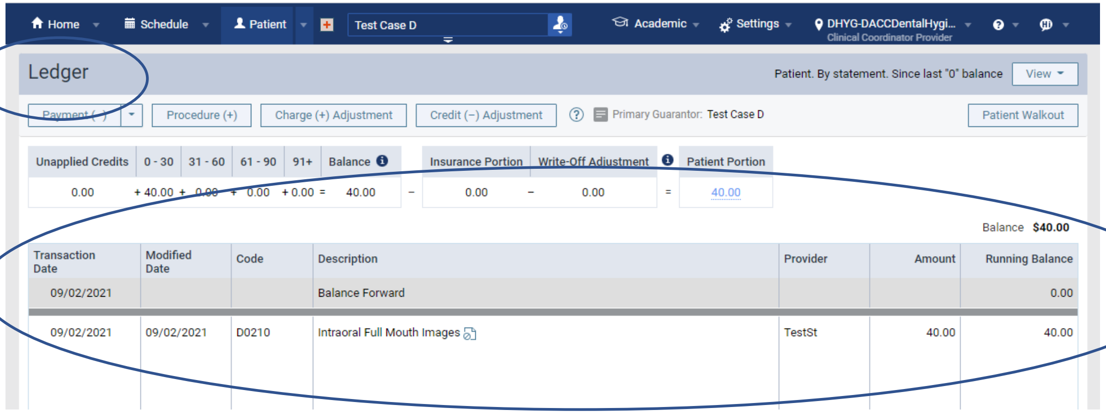
- If you treatment planned a procedure, and you were able to finish what you treatment planned during the same appointment (this is usually the case for radiographs), then you need to make sure it is showing as "Completed" in the Tx planner.
- At this point, after treatment as been planned, the treatment case should be under "Accepted" on the left hand side.
- You will need to click the case under "Accepted" and "Request Procedure Approval."
- This will bring the same popup to select the attending provider and your operatory.
- This will then send another notification to faculty to complete the procedure. Faculty can approve this at their workstation or enter their username and password at the student workstation.



Step 6: Checkout: Tx Planned Procedures Complete

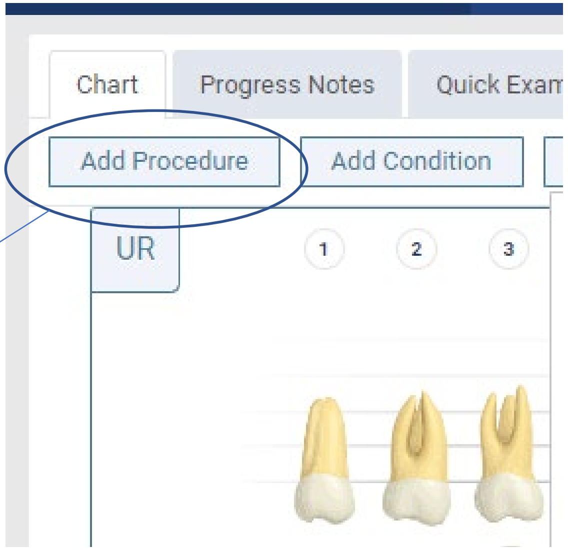
- Once approved, the case will go from “Accepted” to “Completed.”
- *Faculty note* double check that the procedure is in the ledger and that there are not any duplicates of the same procedure. You can delete duplicates from the chart or the ledger if needed.

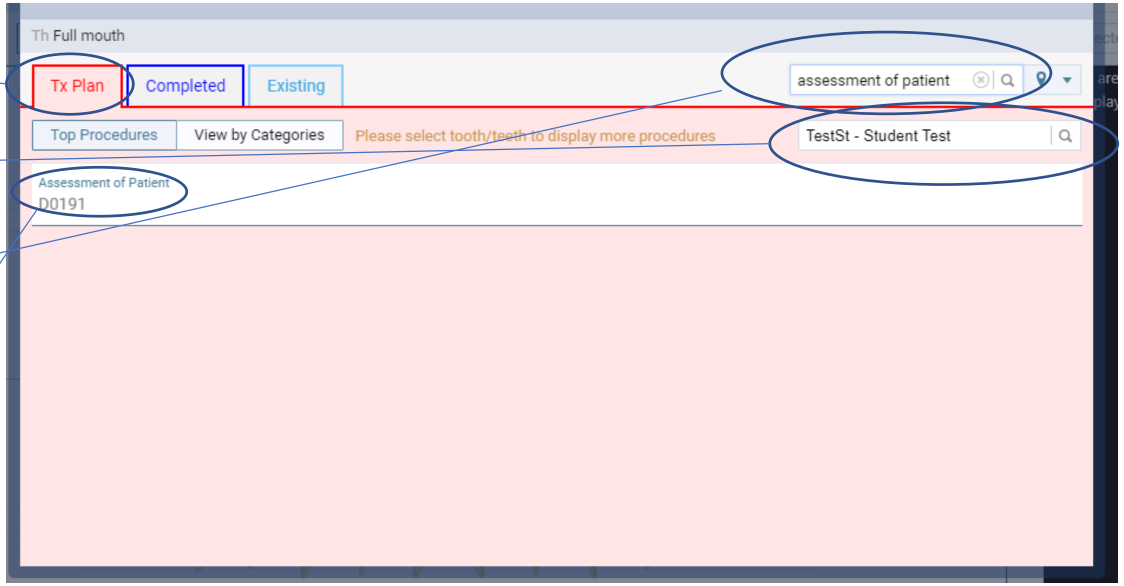




Step 6: Checkout: Non-Tx Planned Procedures Complete

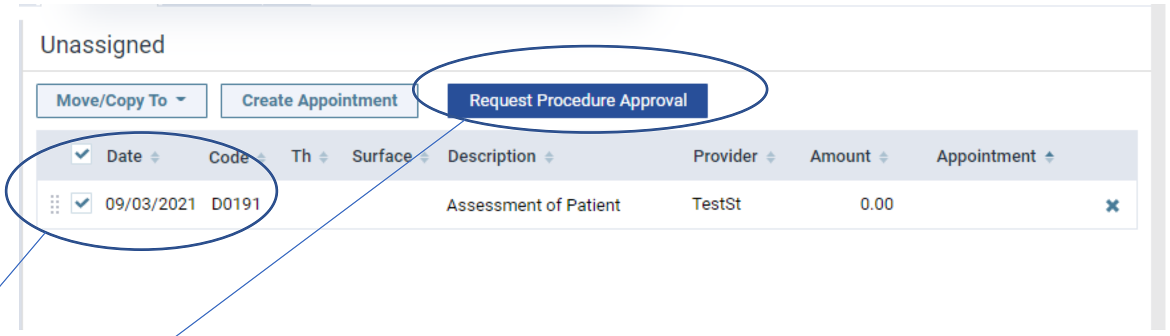
- If you completed only assessments for the day, for example, because your patient wasn't due for radiographs and you didn't get far enough to create a treatment plan and start treatment, you still need to show that assessments were done for the day.
- In the chart, click add procedure.
- Make sure you are on treatment plan
- *side note* for any procedure you are treatment planning, make sure you are the selected provider.
- Then search for assessments.
- When you click it, it will be added to the patient chart.

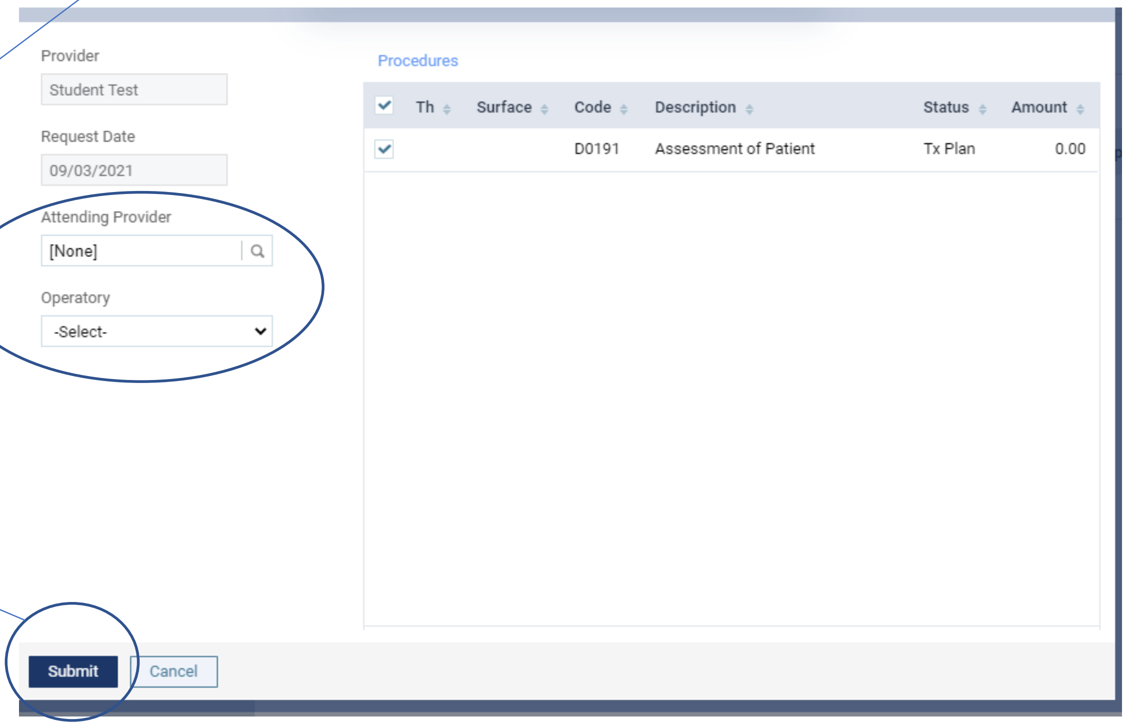




Step 6: Checkout: Non-Tx Planned Procedures Complete

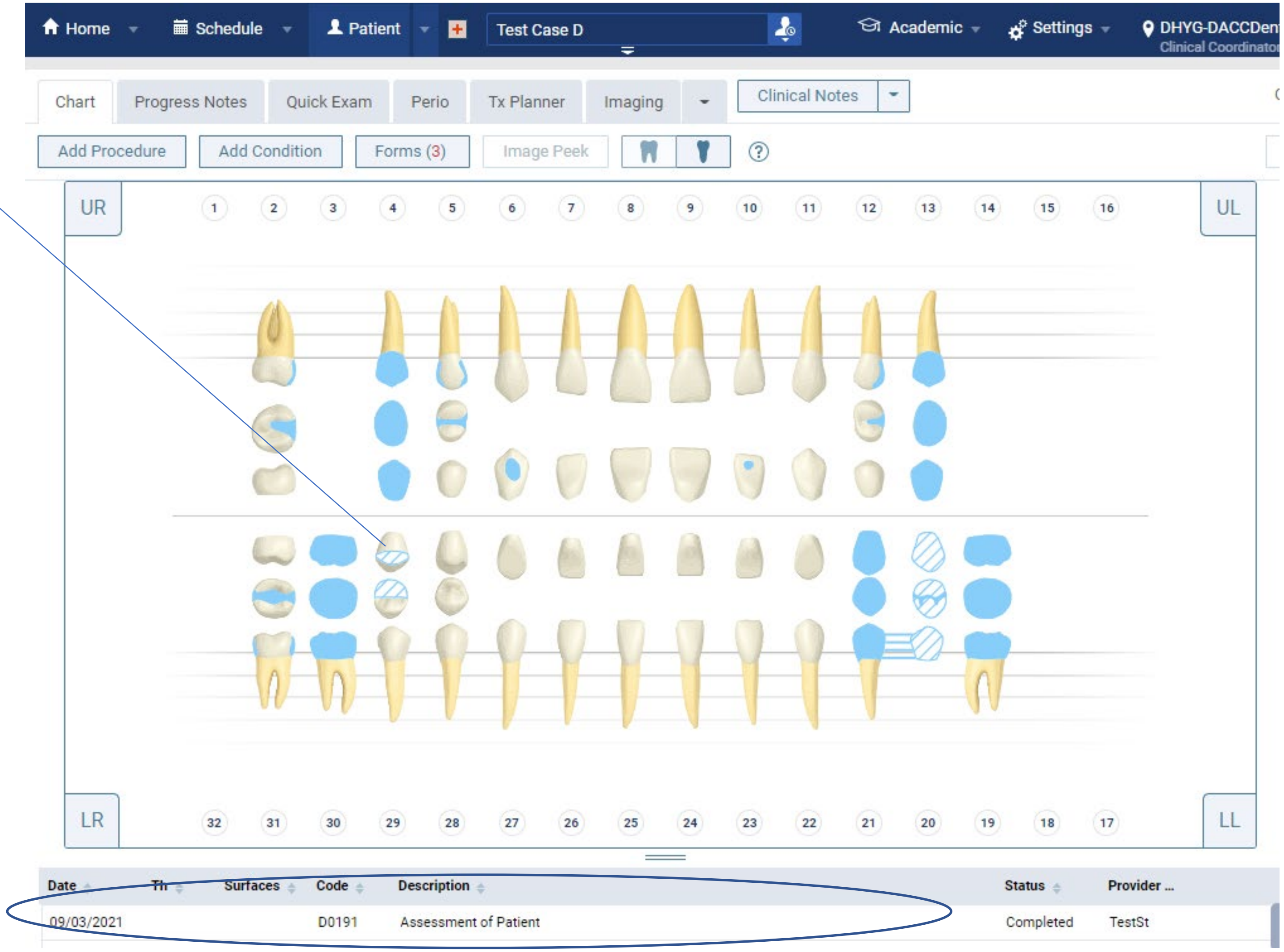
- Because the patient does not need to sign consent for assessments, you do not need to go through the process of creating a case.
- All you will do is select the procedure by clicking the checkbox.
- Then select request faculty approval.
- The same prompt will come up for you to select your faculty and your op. Click submit.
- The faculty will get a notification and will need to approve the procedure at their work station or at the student workstation.





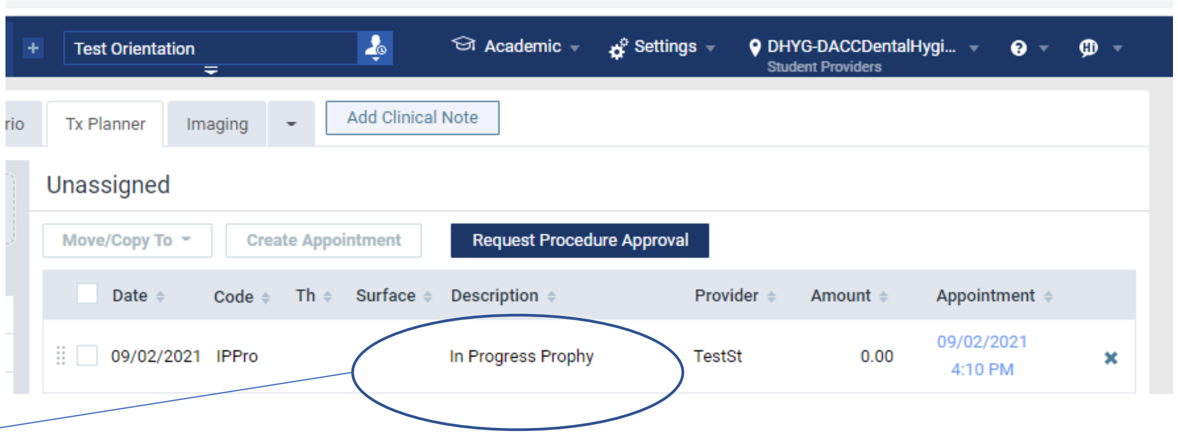
Step 6: Checkout: Non-Tx Planned Procedures Complete

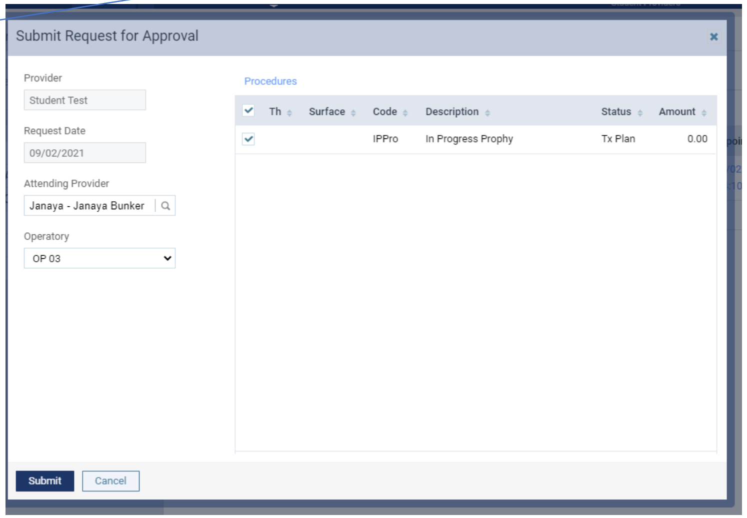
- Once faculty approves the procedure, you will notice it is complete in the chart.
- If done correctly, the procedure will show up in the ledger.

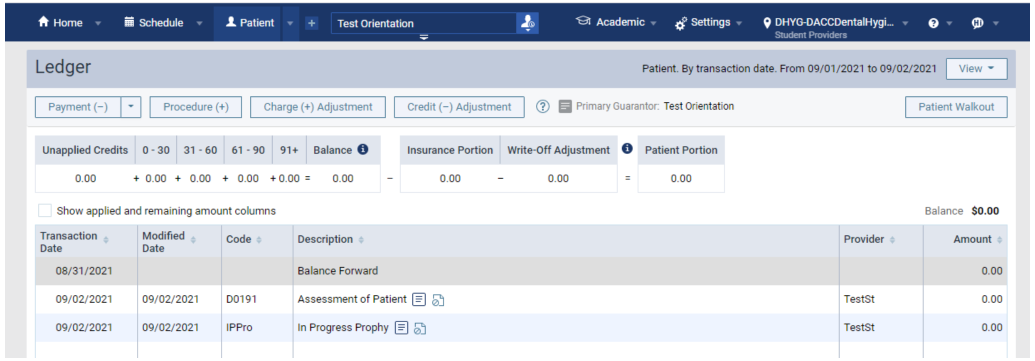


Step 6: Checkout: In-Progress Tx Planned Procedures

- If you treatment planned a procedure, the patient signed consent and you started treatment, but were not able to complete it, this is where you would need to add the “In Progress” code.
- This is the same process as adding a no charge code such as “assessments” as discussed in the previous slides.
- There is no need to create a new case or have the patient sign for this.

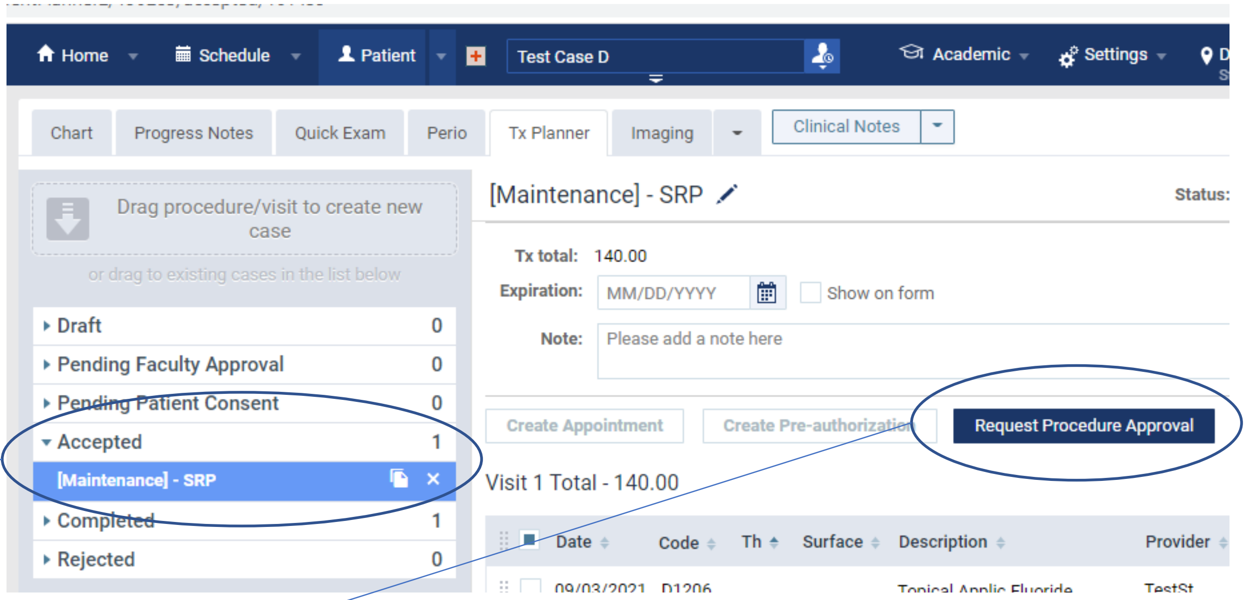






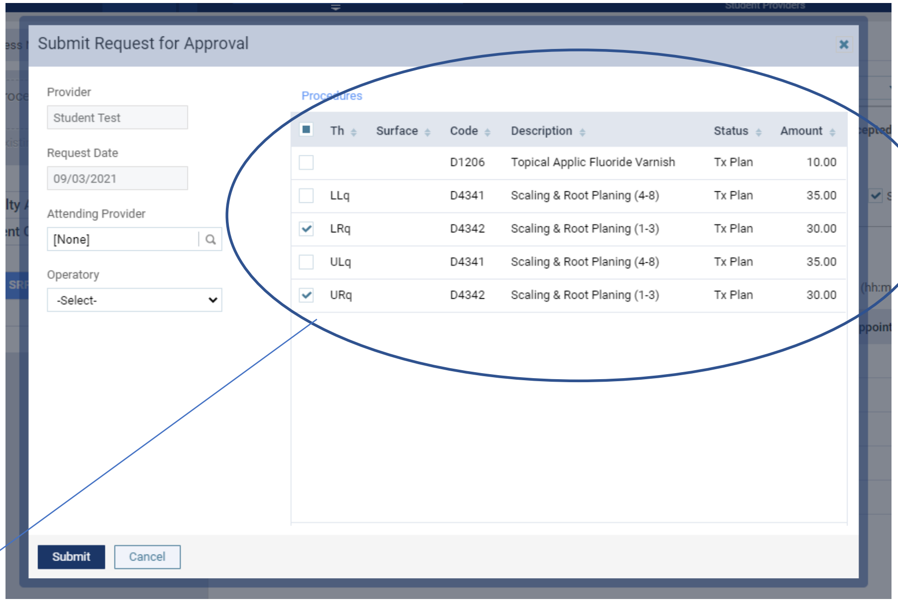
Step 6: Checkout: Partially complete Tx Planned Procedures

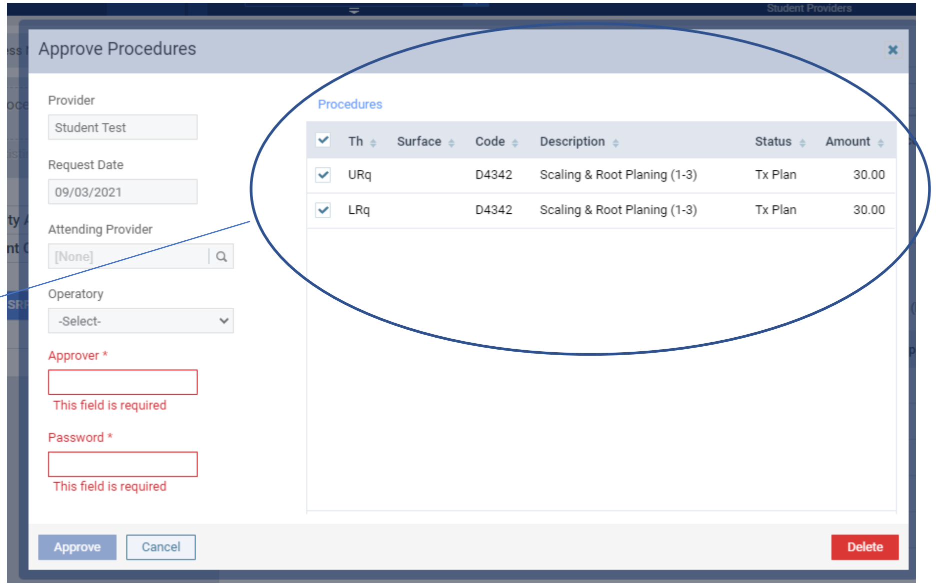
- If your treatment plan involved multiple codes and you were only able to complete part of the treatment plan, there is a different process.
- At this point, the case should be under “Accepted.”
- Click the case as normal and select “Request Procedure Approval,” also as normal.



Step 6: Checkout: Partially complete Tx Planned Procedures

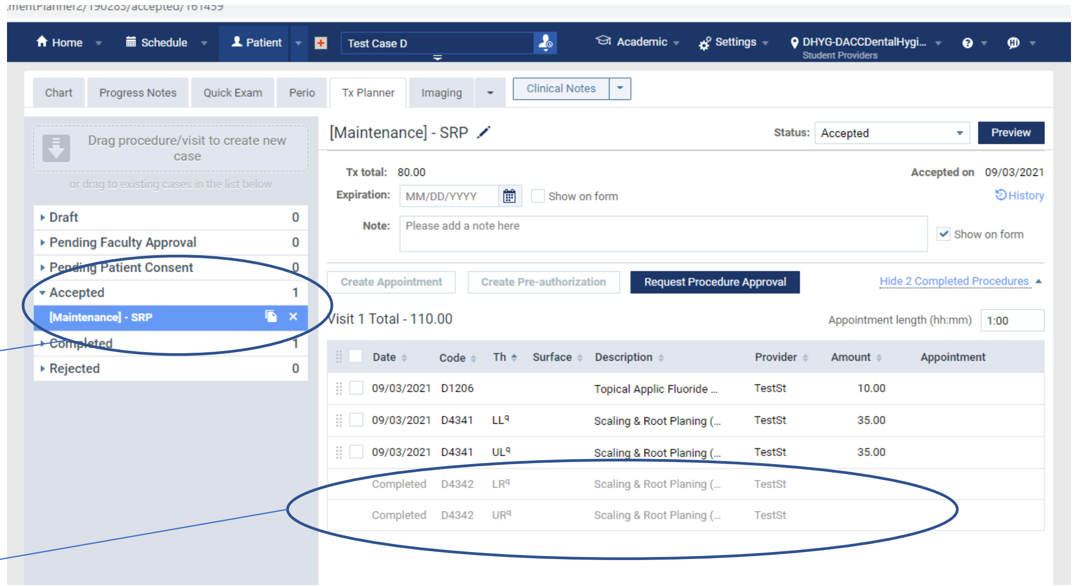
- Where this process differs from completing a full treatment plan, when requesting approval, faculty should only approve what was done that day and not the entire treatment plan.
- For example, if SRP is need in all 4 quads, but you only completed the UR and LR, then <u>only select those quads</u> by checking the boxes next to only those.
- When faculty goes to approve, they will only see those selected quads; not the entire tx plan.

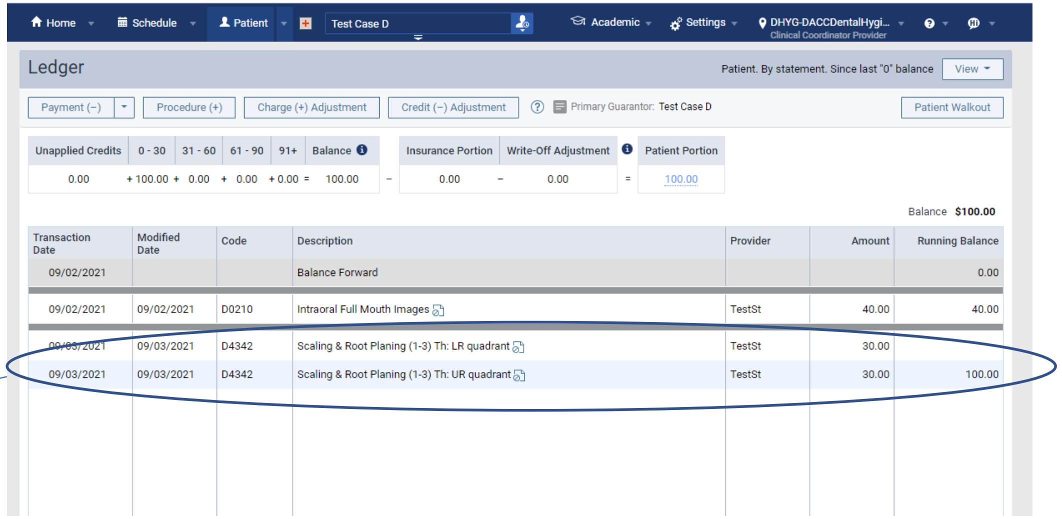




Step 6: Checkout: Partially complete Tx Planned Procedures

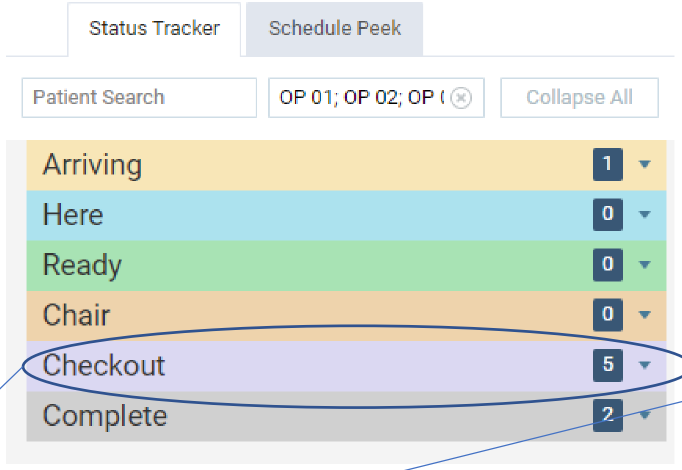
- This is going to look different in the Tx Planner as well.
- Instead of the case moving to “Completed,” it will still be under “Accepted.”
- But, you will see that those completed procedures show as complete within the case.
  - The uncompleted procedures are still there and the option to request approval for them is still there.
  - Once all procedures in the case are complete, the case will move to “completed.”
- Check the ledger to make sure the procedures are shown there.

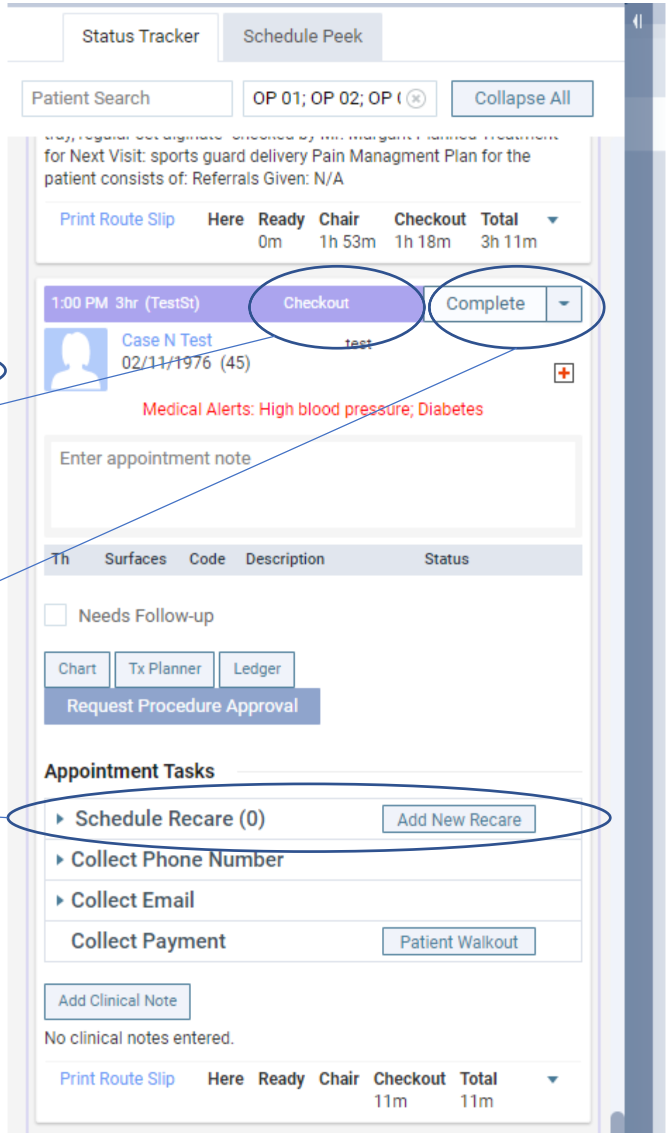




Step 7: Completing the Appointment for the Day

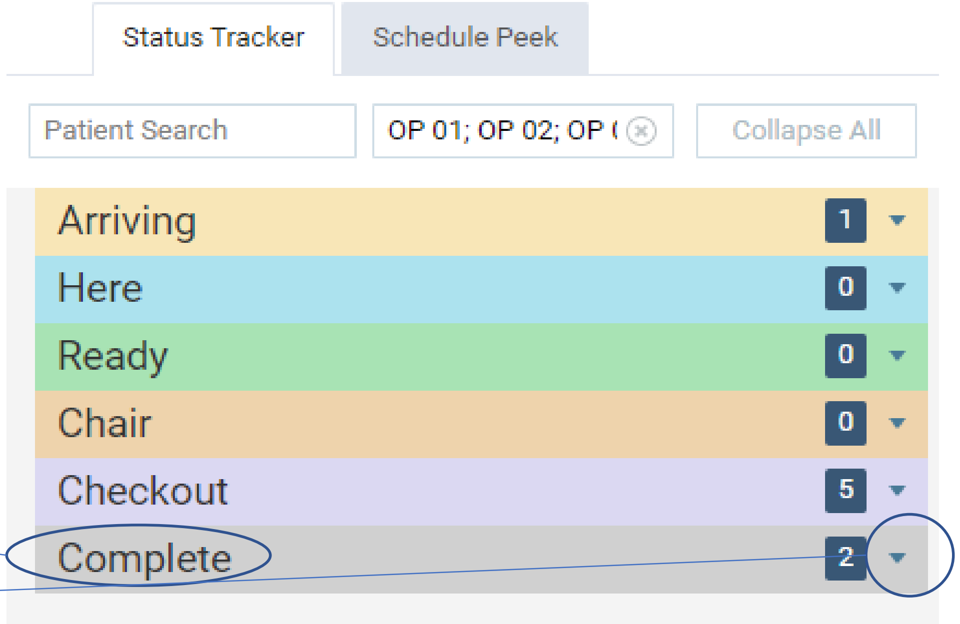
- Students, you will need to make sure you're updating the status tracker.
- Your patient should move from "Chair" to "Checkout" once you are ready to dismiss them for the day.
- You can schedule your recare appointment here.
- Once this is done, you click complete to complete this appt for the day.

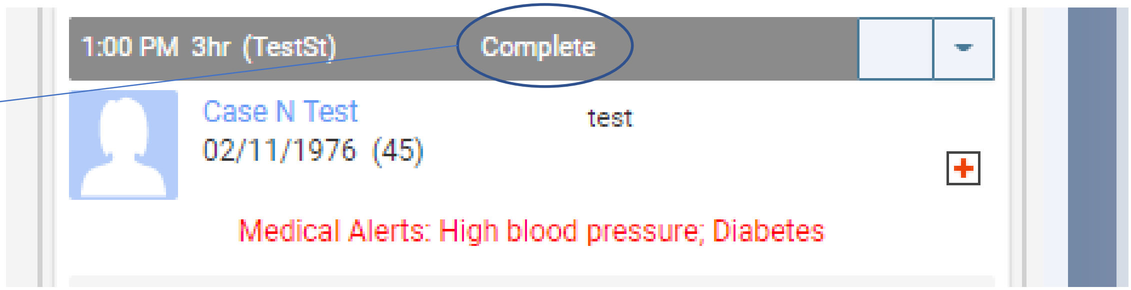




Step 7: Completing the Appointment for the Day

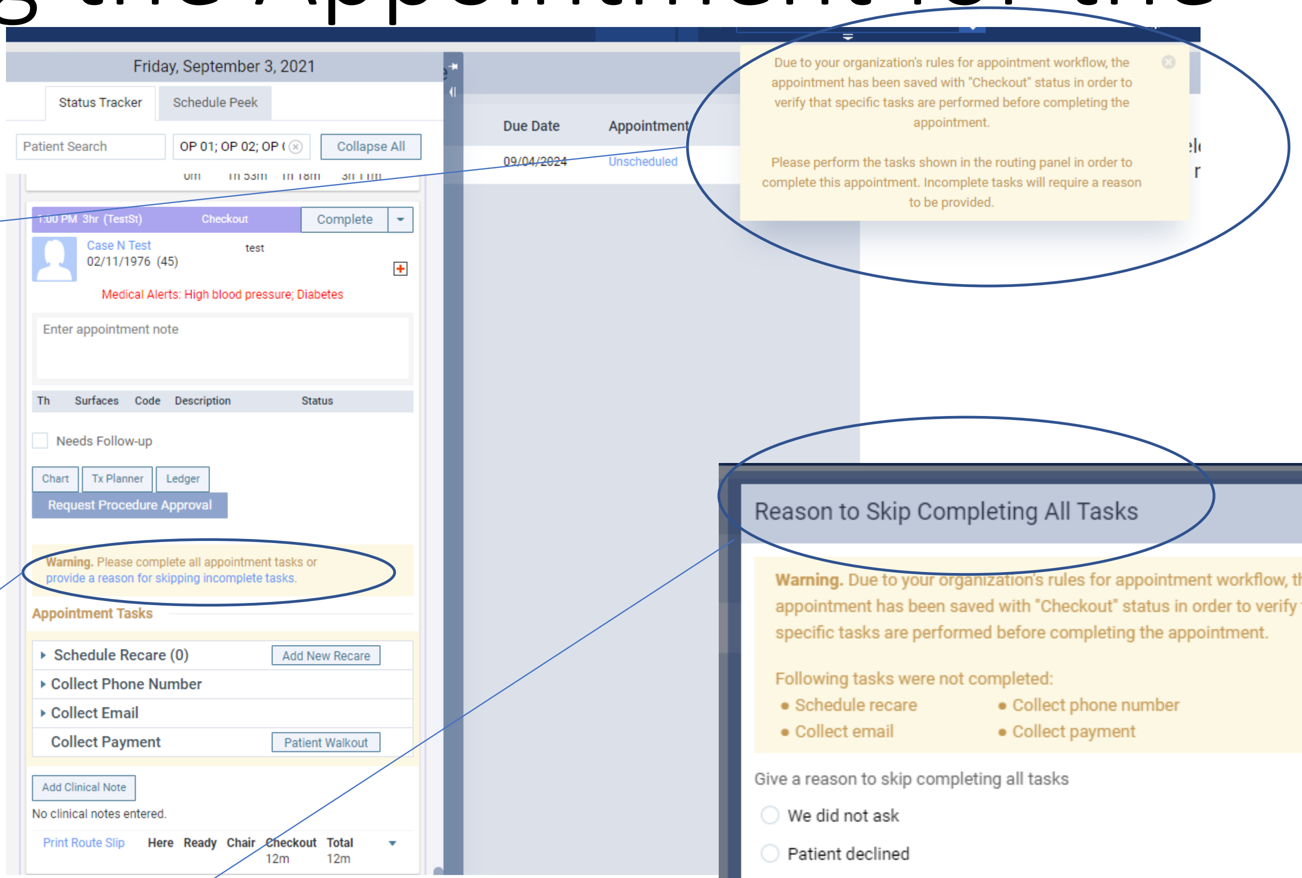
- You will know this process is complete when your patient moves in the status tracker to "Complete."
- You can click the drop down arrow next to complete, to make sure your patient is there.

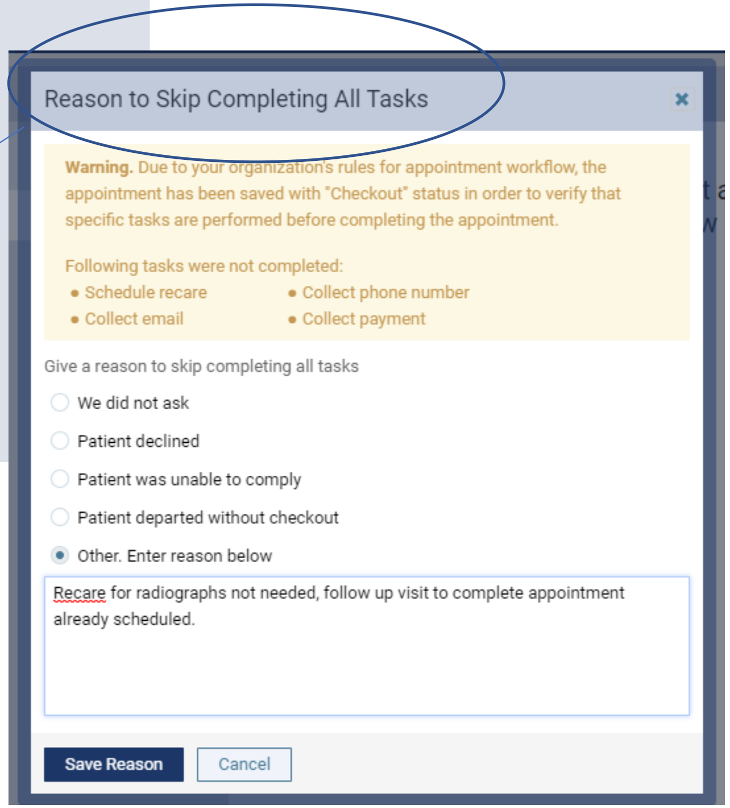




Step 7: Completing the Appointment for the Day

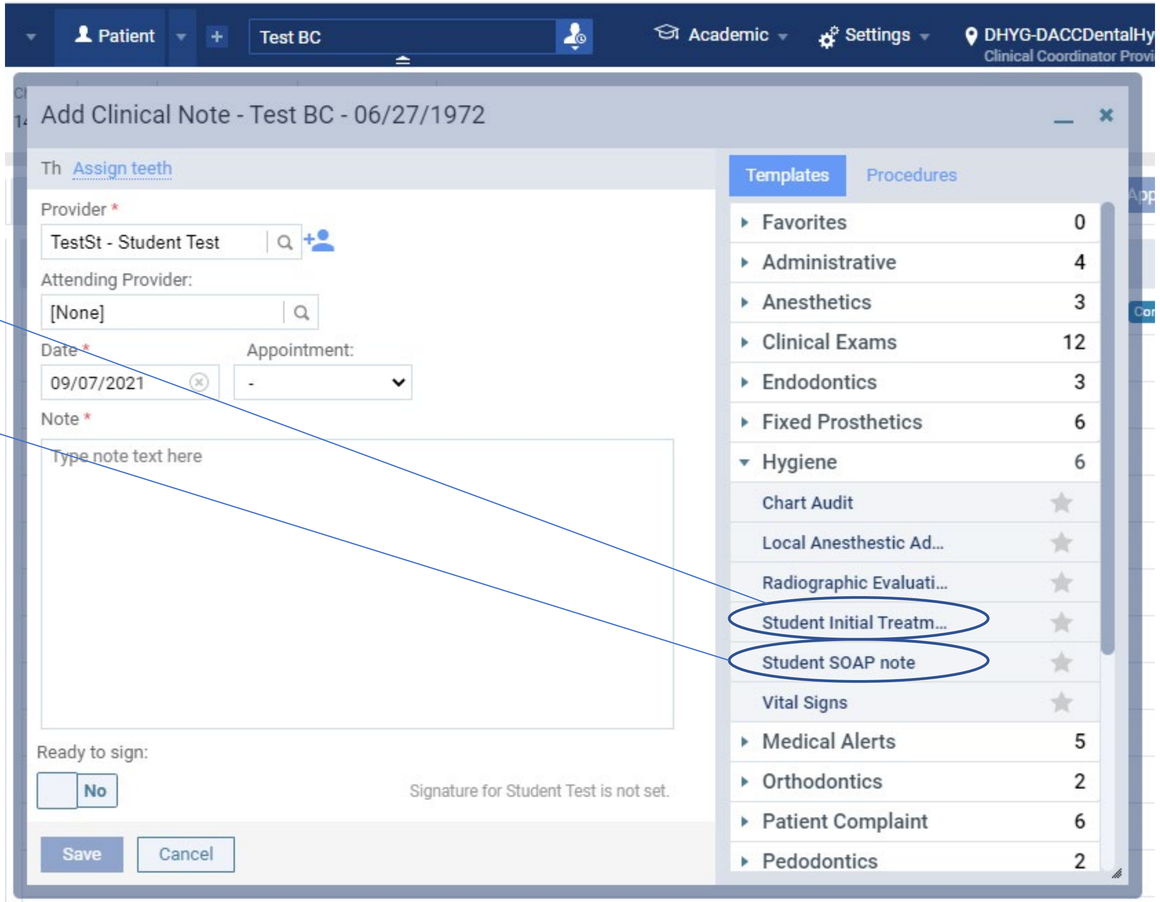
- *Note* the system requires a follow up appointment to be scheduled. If you did not schedule at the checkout (b/c the patient didn't want to at this time or b/c you already had an appointment scheduled), which is fine, you will get a pop up telling you that you need to schedule.
- You can still proceed by selecting "Provide a reason for skipping incomplete task."
- This will bring another pop up where you can enter your reason and save it. This will let you proceed to completing the appointment for the day.





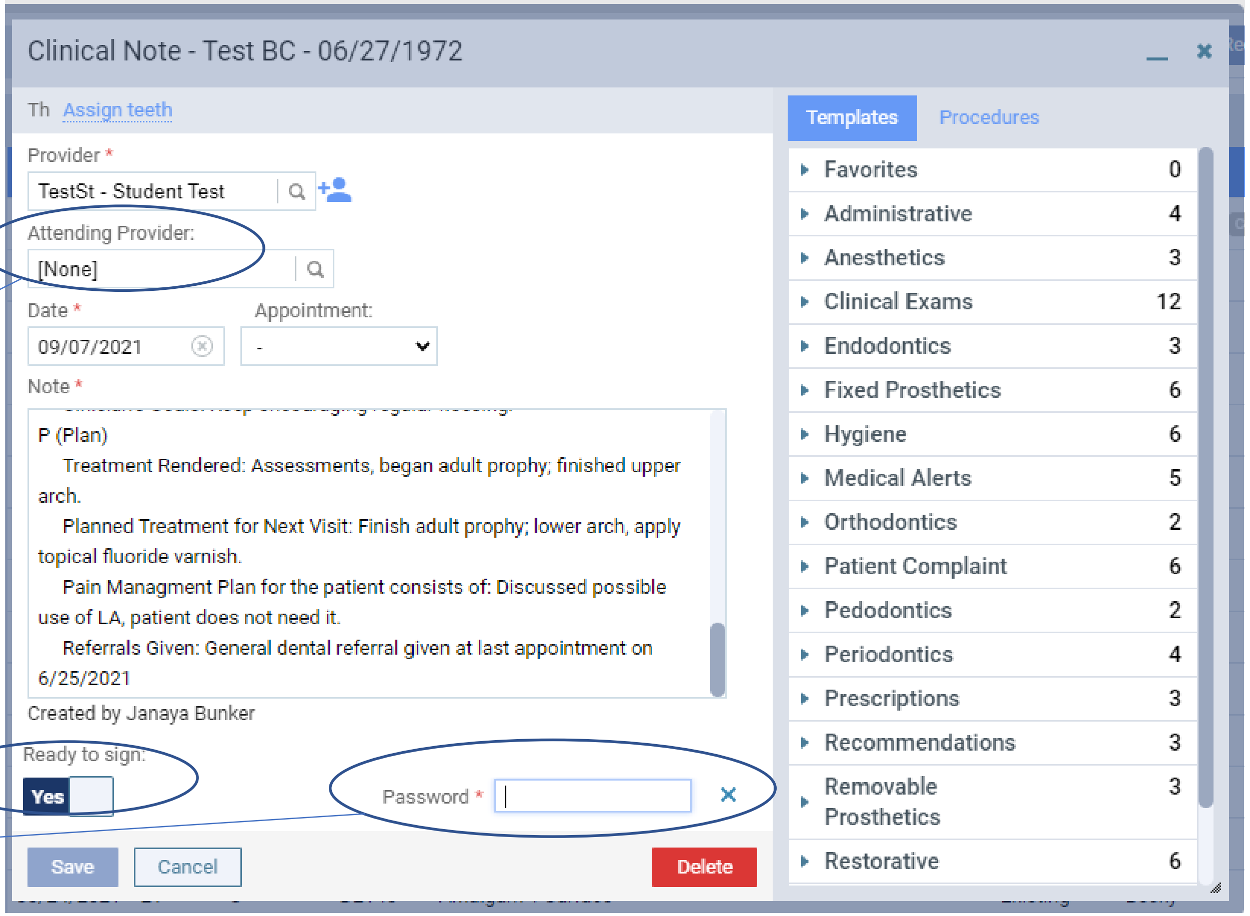
Step 8: Completing and signing notes

- Every patient should have a Student Initial Treatment note AND a Student SOAP note.
- The Initial Note should be started first and should be in progress until the patients full treatment is complete.
  - You will need a new initial note at each recare appointment.
- There will need to be a SOAP note created each time the patient comes in.



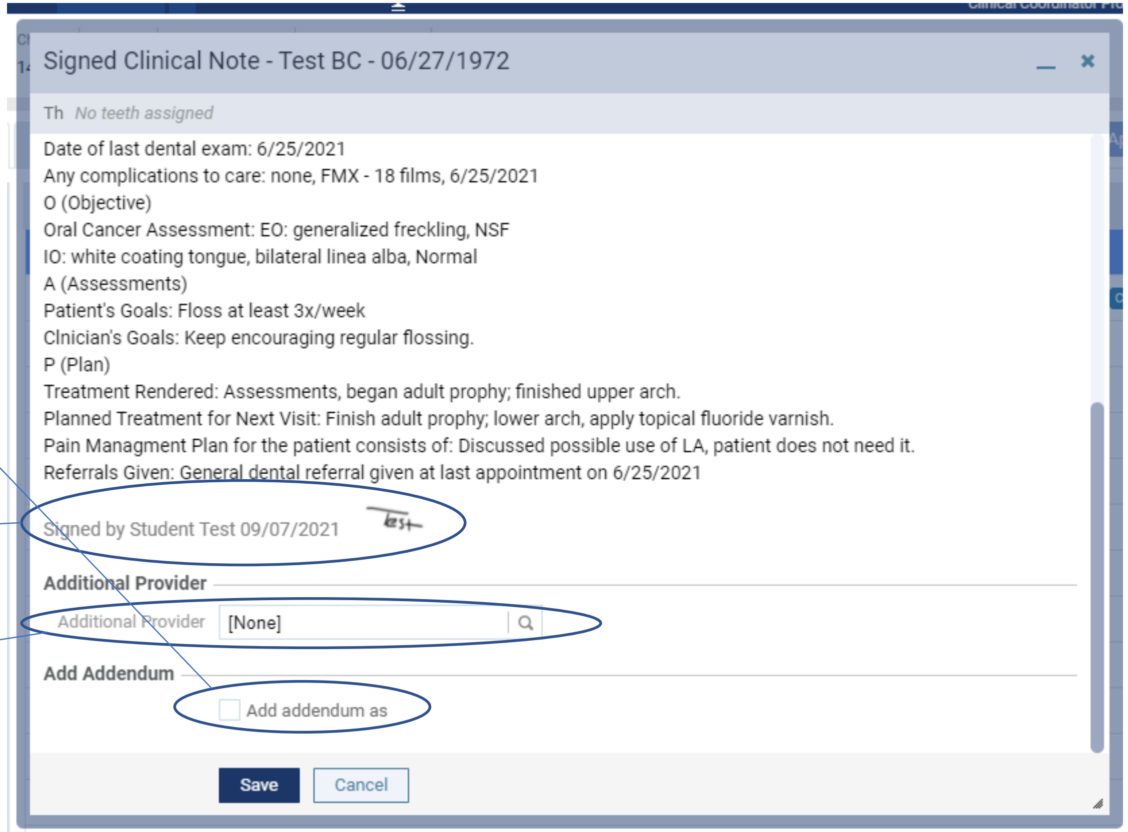
Step 8: Completing and signing notes

- *ONCE A NOTE IS SIGNED, IT CANNOT BE EDITED*
- When you believe notes are ready to be signed:
  - Ask for faculty approval. Faculty will review notes for any errors.
  - Once errors are fixed, faculty may give the okay to sign notes.
- To sign, toggle the “Ready to Sign” switch to “Yes.”
  - At this point, DO NOT enter an attending provider. (If you do, it will put the attending providers signature instead of the students signature).
- Students will need to enter their password to sign notes.



Step 8: Completing and signing notes

- **Once a note is signed, it cannot be edited.**
- If a note needs to be corrected after it was signed, an addendum can be made, by checking the "Add addendum as"
  - It is preferred that this not be done unless necessary, because the correction is made at the bottom of the note, rather than to the note itself.
- You can verify that the students signature is added.
- Then, at this point, the attending faculty signature can be requested by searching the faculty's name.
- Faculty will have to enter their password also in order to sign.



- This is a working document. If at any point any procedures need to be amended, please let clinical coordinators or director know so that appropriate and accurate updates may be made.