Create Initial GP Clear Aligner Treatment Plans

In order to create financial arrangements, present them to patients, and properly schedule treatment, diagnosed treatment must be grouped together into a Treatment Plan. This process is done within the Treatment Plan activity.

It is recommended that you wait until coverage is created and attached to the Visit before starting the steps below. Doing so eliminates the need to redo a financial arrangement (FA) after coverage is attached.

Group Treatment into Visits

During the patient's clear aligner consultation, the dental assistant will take any necessary x-rays (e.g. a pano), which the general dentist will review in order to provide a diagnosis. The dentist or dental assistant will add the D0140.C procedure code to the tooth chart based upon that diagnosis, after which you will need to group the treatment into Visits and create a financial arrangement to present to the patient. The following steps use an adult treatment 12 months with retainers as an example.

> Refer to the *Create and Present Dental Treatment Plans* Tip Sheet for information on how to create Treatment Plans and organize treatment into Visits.

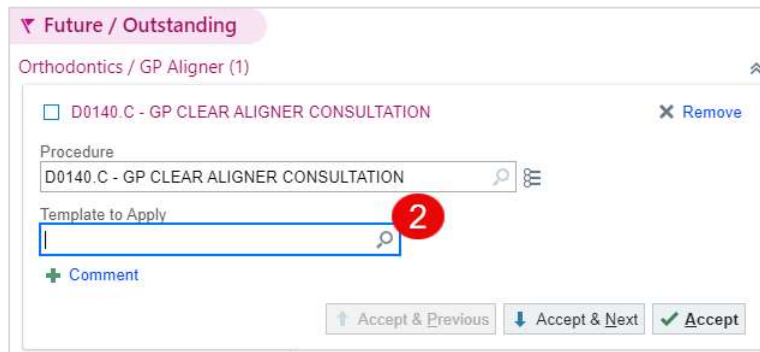## Step 1: Access the Treatment Plan Activity

When preparing a clear aligner Treatment Plan to present to the patient, be sure to access the Treatment Plan activity for today's encounter.

1. Open the patient's **Appointment Desk** and select today's GP aligner consultation appointment from the **Future** tab.

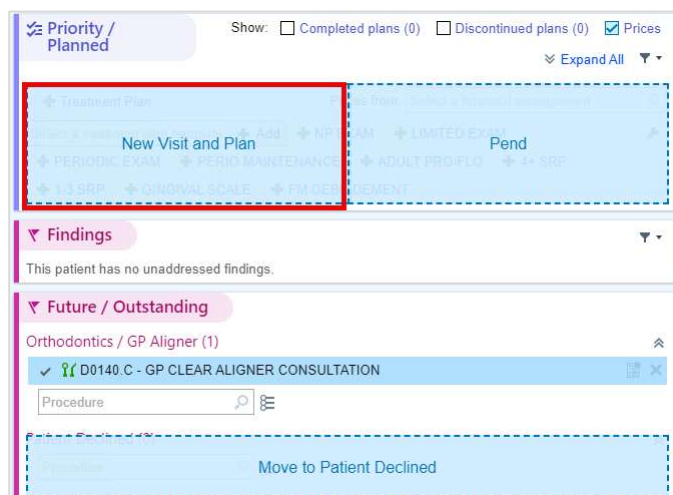2. Click 🦷 **Treatment Plan.**

Step 2: Group Treatment

1. Click the **template** (▤) icon and then click **magnifying glass** (🔍) icon in the **Template** field and select the correct template based on the clinician's diagnosis.

2. Click ✔ **Accept** to save the template.

3. Click the **checkbox** next to the D0140.C procedure code to select it.

4. Then, click the **New Visit and Plan** box in the **Priority / Planned** section. The system will automatically group the procedures into Visits.

5. Change/re-arrange any procedure codes as needed.

6. Name the Visits and click 📅 **Requested** to enter the scheduling information. The length of Visit should be populated for you. Use the speed buttons if applicable or click the magnifying glass and search to select the Department and the Provider for all four Visits by clicking ➡ **Accept & Next** until you reach the end of the visit for the treatment.

7. Click ✔ **Accept** to close out of the window.

> The number of Visits and names of the Visits may vary based on several factors such as when records are taken, whether a same-day start, etc. Adjust as needed to suit each patient's unique situation.

Create the GP Clear Aligner Treatment Financial Arrangements

Step 1: Create Treatment Financial Arrangements

1. Create a FA for the Treatment Plan you just created by clicking the **Create drop-down arrow** and select ✚ **Create & Build**.

2. Name the FA "12 Month Clear Aligner Tx," ensure that the **Records**, **Initial Aligner Delivery**, **Aligner Complete**, and **Retainer Delivery** visits in the Clear Aligner Treatment Plan are all selected, and then click **Accept**.

   > ❗ Do not include any treatment that is not directly related to the clear aligner Treatment Plan (e.g., X-rays and exams performed as part of the patient's CCX appointment).

3. Double-click on the Treatment Financial Arrangement to open it. Click the **refresh** (⟳) icon if the hourglass (⌛) icon does not go away.

4. Review the fees and make any necessary updates.

   > Refer to the *Create and Present Dental Treatment Plans* Tip Sheet for information on how to update fees on the estimate.

Step 2: Save Financial Arrangements

1. Click **Finalize** to save the FA so that you can present it to the patient.

2. Select the **Send Letter** check box and ensure the HIGH POINT UNIVERSITY – FA financial arrangement format is selected.

3. Preview the letter and then click ✖ **Close**.

4. Click ✔ **Finalize**.

5. Close FA activity so that you can open it in the operatory with the patient.

Step 3: Update Visit Financial Arrangement for Treatment Being Done Today

1. After finalizing the Treatment FA, click the **Related Information** tab on the right side of the screen. You should see a link to the Visit Financial Arrangement associated with today's appointment, which was created during prep. Click this link to open the previously linked Visit FA.

2. In the linked Visit FA, click ⇨ **Replace** in the lower-right corner.

3. In the **Related Information** tab, click ✚ **Match** to link the Visit FA to the Treatment FA you created, pull any changes you made on the Treatment FA into the Visit FA, and keep the two FAs in sync moving forward. Matching the FAs will also automatically finalize the updated Visit FA.

    a. If you do not see ✚ **Match**, click ▦ **Recalculate** on the estimate. This should cause ✚ **Match** to appear in the Related Information section.

Step 4: Obtain Signatures on Financial Arrangements and Consents

Patients must sign their financial arrangements for them to be valid. For clear aligner treatment, the patient signs the Treatment FA not the Visit FA.

1. Open the Treatment Financial Arrangement and click 🖥 **E-Sign**.

    a. If the 🖥 **E-Sign** button is not immediately available, click 📮 **Send Letter**, select the HIGH POINT UNIVERSITY – FA format, and click ✔ **Accept.**

2. Click ❗ **Guarantor.**

3. Click **Sign Here** and ask the patient to sign using the signature pad.

4. Make sure all signature fields are completed and click ✔ **Accept** or if desired, print a copy of the financial arrangement by clicking 🖨 **Accept & Print** and then clicking 🖨 **Print** to send to the appropriate printer.

5. Close the Financial Arrangements activity to return to the **Treatment Plan** tab.

6. In the **Documents** table, search for "aligner" and select **Clear Aligner Therapy Consent**, have the patient sign, and then click ✔ **Accept.**

Financial Arrangement Warnings

At checkout, you may see one or more of the following warnings if the Treatment Financial Arrangement was set up incorrectly. Make the necessary updates outlined in the warning message before completing checkout.

Warning Message	Warning Trigger
Financial arrangement contains an aligner delivery code but does not contain a proper orthodontic treatment code (D80xx). Aligner deliveries must always be entered with an orthodontic treatment code.	Treatment FAs that have an Aligner Delivery – Initial code without a D80XX code
Financial arrangement contains orthodontic procedures but does not have an orthodontic guarantor. Update the guarantor used on the FA with the patient's orthodontic guarantor. If an orthodontic guarantor does not exist, you will need to access registration to create one.	Treatment FAs that have a D80XX code without an orthodontic guarantor account
Financial arrangement contains an orthodontic treatment code without a total fee. Orthodontic treatment charges should always contain a total fee.	Treatment FAs that have an orthodontic treatment charge without a total fee

Finalize Visit Financial Arrangement for Today's Appointment

Move treatment into the **This Visit** section of the Treatment Plan and finalize the Visit FA.

1. Select Visit 1 from the **Priority / Planned** section and click in the **Include in Appointment** box in the **This Visit** section, which will generate a Visit Estimate.

2. Click **Finalize** to update the Visit FA. If providing a copy to the patient, click the **Send Letter** checkbox in the **Finalize & Share Estimate** window, and then click **Finalize**.

Finalize Visit Financial Arrangements for On-going Clear Aligner Treatment

You must create Treatment FAs for subsequent appointments that were not included as a Visit with scheduling information in the original Treatment Plan (e.g., GP Aligner Delivery-Routine).

Complete your prep for the aligner delivery appointment by creating and finalizing a Treatment and a Visit FA with the D8999.I (Aligner Delivery-Routine) code.

1. Open the patient's **Appointment Desk** and select today's GP aligner delivery-routine appointment from the **Future** tab.

2. Click 🦷 **Treatment Plan.**

3. In the **Priority / Planned** section, click the **Treatment** template button to open a new Treatment Plan. In the **Procedures** field of Visit 1, add the code D8999.I.

4. Name the Treatment Plan "Routine Aligner Delivery," name the Visit, and click 📅 **Requested to** enter the scheduling information.

5. Click the **Create drop-down arrow** and select ➕ **Create & Build.**

6. Name the FA, ensure that the **Routine Aligner Delivery: Planned** Visit is the only one selected, and then click **Accept.**

7. Finalize the Treatment FA, and then close the Financial Arrangements activity.

8. Click the **move** (⣿) icon next to the Visit to move it to **This Visit.**

9. Click the **refresh** (🔄) icon to generate the Visit FA.

   a. If the **stacked paper** (📑) icon appears for the Treatment Financial Arrangement, click it, and then discard the pending FA.

10. Open the Visit Financial Arrangement. In the **Related Information** tab, click ➕ **Match** to link the Visit FA to the Treatment FA you created. Then, close the Financial Arrangements activity.