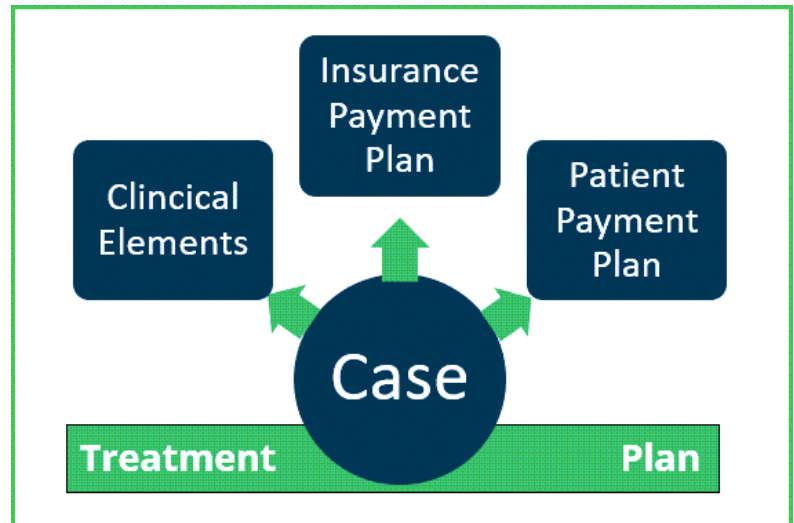


# Clinical Orthodontic Elements

## Overview

You've learned that the orthodontic case links the many different elements together.

- The foundation of the Case is the **Treatment Plan** -the specific treatments the orthodontist suggests for the patient, charted with specific codes.
- Within that case, there will be important **clinical elements** - notes, objectives, and summaries.
- For the billing, you'll be able to create specific **payment plans** for both the patient and the insurance company to bill the codes in designated intervals.



The orthodontic case includes important clinical elements along with the billing elements. In the Ortho Console (**Patient Navigation Bar -> Billing -> Ortho Cases**), you can add, review, and track:

- Treatment Objectives
- Visit Summary
- Care Notes

Ortho Cases Case #1 (Not Yet Started) Add Case

**Overview** Payment Plans

**Case Progress**

Start Date 15 Feb, 2022	Months in Treatment 0 / 24	Months Remaining 24
Planned End Date 29 Feb, 2024	Patient Outstanding Balance \$0.00	Insurance Outstanding Balance \$0.00

Patient Payment Plan \$1,080.00

Received : \$0.00 Receivable : \$0.00

Insurance Payment Plan \$2,400.00

Received : \$0.00 Receivable : \$0.00

**Treatment Objectives** Add Tx Objective

☐ Reduce Crowding

☐ Reduce Overbite

**Previous Visits** Add Visit

12 February 2022 - Tx: Evaluation and Consult - Notes: Recommend Comprehensive - Next Visit Due: 15 February 2022 - Tx Planned: Banding

**Clinical Notes** Add Note Actions ⌵

<input type="checkbox"/>	Date	Note ( Hide Details )	User Name
<input type="checkbox"/>		[ BAND: Band, Aliya ] ORTHO CONSULT. Reviewed Medical History. <b>no changes needed</b> . Reviewed panoramic x-ray. <small>Chief concerns: Overbite, Upper and lower crowding</small>	

## Add a Treatment Objective

A Treatment Objective is a way for the orthodontist to describe the treatment for the case outside of the context of ADA codes. After all, a code is just two sentences of general description.

To add a treatment objective

1. Click **Add Tx Objective**.
2. Type the free-form objective, tapping **Enter** to save.

To edit the objective, click the text to re-open the field.

**Video Resource:** <https://vimeo.com/459544495>

## Add a Visit Summary

A **Visit Summary** is a free-form description of an appointment that can be used to provide findings and additional details. You might appreciate being able to type notes outside of the Care Note function.

To add a visit summary:

1. Click **Add Visit**.
2. Type the details.
3. Click **Save**.

**Video Resource:** <https://vimeo.com/459543662>

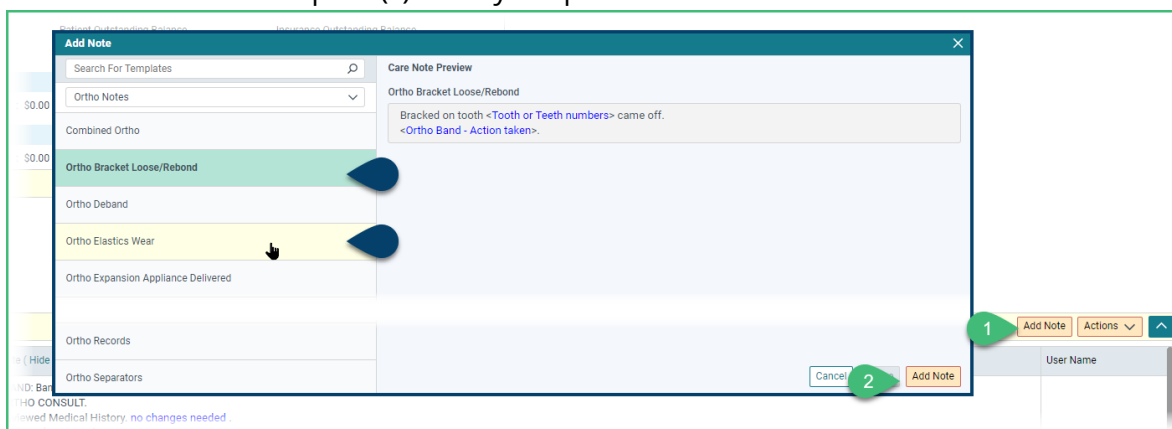
## Add Notes

Having the clinical Notes visible in the chart and in the orthodontic case makes it easy for the provider to review previous notes and to add new ones using CareStack's Care Notes.

Because of the pre-written multiple choice format, many providers stick to adding Care Notes instead of separate visit summaries.

To add a note:

1. Click **Add Note**.
2. Select the desired template(s) from your practice's list and click **Add Note**.



- If you choose more than one note, combine them into a single entry with the **Merge** button.
3. Complete the Care Note as appropriate.
  4. Click **Finalize** or **Save as Draft**.

The draft or completed note will be visible in both the restorative chart and in the Ortho Console.

**Video Resource:** <https://vimeo.com/459544152>