Edit and Delete Chart Entries

Overview

We all make mistakes. It's why there are erasers on pencils.

When you make mistakes when charting in CareStack, you can fix them, if not with an eraser, with a few clicks. How many clicks and which ones depends on where you are in your workflow clinically and in billing.

- Planned codes are easy to fix because there are not funds attached to them yet.
- Completed codes can be fixed too, but it can take a bit more work.

It breaks down like this:

Mistake	Code Status	Action
Wrong Provider	Planned	Edit the provider using the **Code Snapshot**
Wrong Provider	Completed	Edit the provider using the **Code Snapshot**
Wrong Surface or Code	Planned	Edit the surface or tooth in the **Code Snapshot**. *Smart Logic* will update the code as needed.
Wrong Surface but Correct Code	Completed with or without a claim	Edit the surface in the **Code Snapshot**. Might need to update claim.
Wrong Code	Completed without claim	Delete the code entirely and replace it.
Wrong Code	Completed with a claim	Void the claim. Delete the code entirely and replace it.

Remember that CareStack uses profile permissions to control who can perform which tasks and when. Ask your manager if you need access.

It's the Wrong Provider

In CareStack, treatments are associated with a provider.

Sometimes, who we thought would provide the treatment isn't always the one that did. It is important for the provider to be correct on the code. Changing the provider is an easy fix:

1. For the desired treatment row in the grid, click the provider's name.
2. Select the correct provider from the drop-down list.
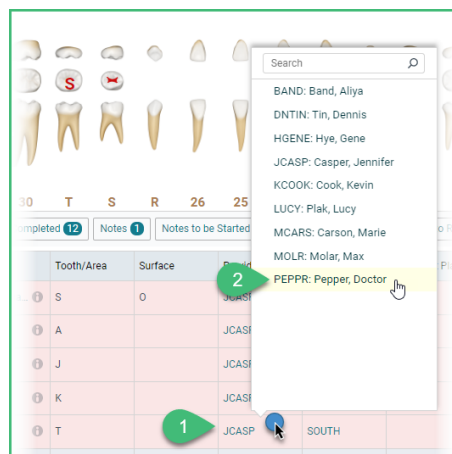
The treatment provider isn't the only provider that we record in CareStack. For claims and revenue, there is also a **Billing Dentist**. Providers without billing settings, like hygienists, need to be associated with a Billing Dentist.

Since Billing Dentist isn't in the grid, if you need to change it, you'll need to use the **Code Snapshot**.

1. Click the **hyperlinked treatment description** to open the snapshot.
2. Select the correct billing dentist from the drop-down list.
3. Click **Save**.
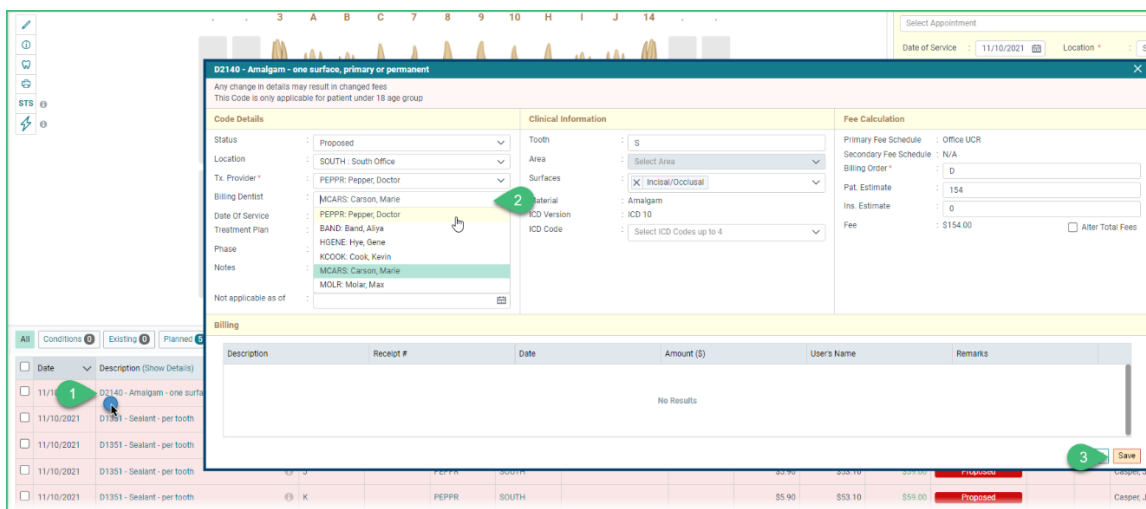
- You can change the treating provider or the billing provider in the snapshot.
- If the treatment isn't associated with an appointment, you can change the Location.
- Depending on your permissions, you might also be able to change the fee, but we recommend you use adjustment codes instead.

In summary, you can always change the provider or billing dentist on planned or completed codes.

Video Reference: https://vimeo.com/645808827

It's the Wrong Surface or Code

Charting the wrong surfaces or the wrong tooth can easily happen when you are working quickly.

Conditions and Planned Codes

To change conditions and planned codes, we'll return to our old friend, the Code Snapshot:

1. Click the **hyperlinked treatment description** to open the snapshot.
2. Change the tooth or surfaces as appropriate.
3. Click **Save**.

- Since the code is still planned, Smart Logic can update the code to match the number of surfaces. This logic considers the tooth and surfaces relative to the ADA code rules.

Completed Codes

Once the code has been completed, though, changing the surfaces or tooth can be more challenging. You can still change a surface, or even a tooth with the Code Snapshot **AS LONG AS** the change DOESN'T affect the code.

If your change will impact the code itself because of the number of surfaces or the position of the tooth, you must delete the code and enter the correct one.

**Video Reference**: https://vimeo.com/645809583

I Have to Delete the Code

While there are options for making changes to planned and completed codes, sometimes, the best option is to delete the bad entry and start over.

- Entries for conditions and planned items can always be deleted, even if you have presented the treatment plan.
- Entries for completed items can be deleted, but any claim must be voided first.

You'll use the right-click menu to delete:

1. Select the entry or entries.
2. Right-click.
3. Select **Delete**.
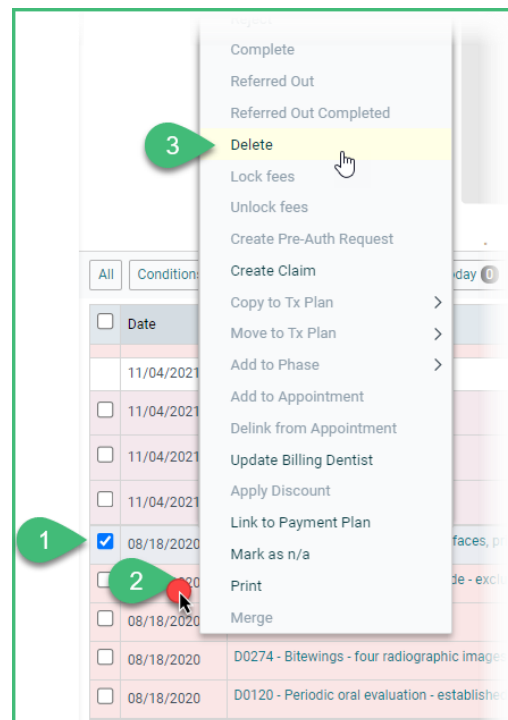
Since deleting is a crucial function, CareStack will ask you to confirm you want to delete your code.

4. Click **Delete** on the confirmation window. The window will contain an additional message if a patient payment has been applied.
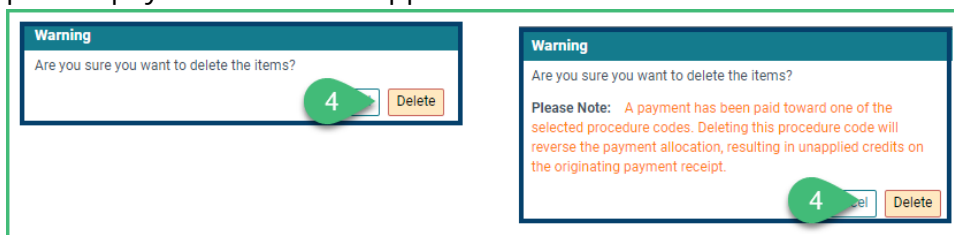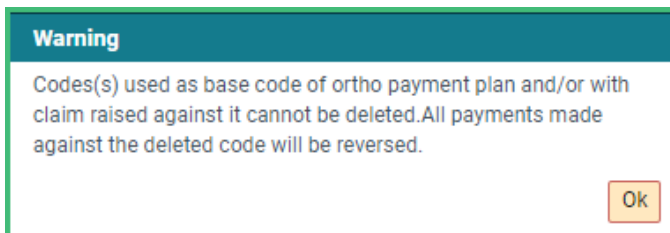

With that, the entry is deleted and doesn't appear in either the odontogram or the chart details. The charge for the code is removed and any patient payments are unapplied. It's gone.

Video Reference: https://vimeo.com/645808248

When There are Active Claims

There's a catch, though. If the code is already part of a claim, you won't be able to delete it while the claim still lives.

Instead of the confirmation window, you'll get different message, and the code will NOT be deleted no matter how many times you try.

Warning

Codes(s) used as base code of ortho payment plan and/or with claim raised against it cannot be deleted.All payments made against the deleted code will be reversed.

Ok

Though there is no ortho payment plan involved, this message still lets you know that **codes that are already on claims cannot be deleted while that claim exists**.

Then what? Work with your billing team to see the status of that claim:

- Claims that have NOT been sent can be deleted. At that point, you can delete the code and create a new one for the claim.
- Claims that have been sent CANNOT be deleted, instead they must be marked as Void. Once the claim is void, you can delete the codes.

Mark an Entry Not Applicable

As time passes, your patients' oral health changes. Restorations are completed and new ones are required. You don't want to delete the filling the patient had three years ago, but now it is time for a crown.   What can you do?

You can mark the entry as Not Applicable in the code snapshot:

1. Click the **hyperlinked treatment description** to open the snapshot.
2. Enter the date in the **Not applicable as of** field. Add any notes if desired.
3. Click **Save**.

Marking a treatment as N/A is a clinical action which is your focus. If any financial changes are needed, your billing team may need to reverse or adjust the charges or payments. Follow your practice's policies about who performs each action and the best timeline.

Once you mark your treatment N/A, the odontogram will no longer reflect the treatment. The chart details will show the treatment with the N/A designation. If you don't want to see these treatments in the chart details, use your filters to hide them.

Video Reference: https://vimeo.com/645807967