

Completing Treatment

Overview

You've learned how to enter elements in the chart both with and without the Care Panel, creating comprehensive charts that include conditions, existing treatments, and planned ones.

You know how to arrange treatments into coherent plans that encourage the patient to go forward with the treatment.

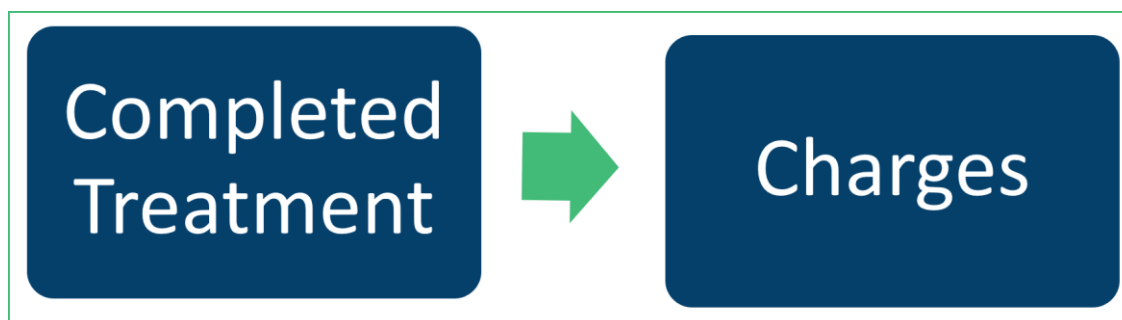
The screenshot displays the CARESTACK Advanced Planner interface. At the top, there's a navigation bar with options like Patient, Alert, Form, Presc., Memo, Lab, Recall, Message, and Print. Below this is a dental chart showing teeth 1 through 16, with various treatments and conditions marked. To the right of the chart is a sidebar with a 'Clinical Summary' section containing appointment details (Date of Service: 09/28/2021, Location: South Office, Provider: Casper, Jenn, Billing Dentist: Pepper, Doct) and a grid of treatment options (EXAM, X-RAYS, QUICK PA, PROPHY / FL, ADULT RECALL, CHILD RECALL, COMPOSITE, AMALGAM, NIGHTGUARD, SEAL/PRV-REST, PERIO / S R P, EXTRACTION, RTC, CROWNS, CROWN / U, VENEERS, PULP PROCEDURES, DENTURE, PARTIAL DENTURE, RELINES/REBASE, MISSING, WATCH, COMMON CONDITIONS, REFER NOTE, RESPONSE NOTE, GENERAL NOTE). Below the chart is a table with columns for Date, Description (Show Details), Tooth/Area, Surface, Provider, Location, Treatment Plan, Phase, Pat. Est, Ins. Est, Fee, Status, Notes, N/A, and User Name. The table lists several treatments, including radiographic images, extractions, and crown placements, with their respective costs and status (Recommended, Accepted, Completed, Proposed).

Date	Description (Show Details)	Tooth/Area	Surface	Provider	Location	Treatment Plan	Phase	Pat. Est	Ins. Est	Fee	Status	Notes	N/A	User Name
10/13/2020	D0220 - Intraoral - periapical first radiographic image	-		PEPPR	SOUTH			\$26.50	\$0.00	\$26.50	Recommended			Casper, Jennifer
10/13/2020	D0140 - Limited oral evaluation - problem focused	-		PEPPR	SOUTH			\$53.00	\$0.00	\$53.00	Recommended			Casper, Jennifer
08/13/2020	D7140 - Extraction, erupted tooth or exposed root (ele...	17		MCARS	SOUTH	New Treatment Plan	Phase 3	\$31.80	\$127.20	\$159.00	Accepted			Casper, Jennifer
08/13/2020	D7140 - Extraction, erupted tooth or exposed root (ele...	32		MCARS	SOUTH	New Treatment Plan	Phase 3	\$31.80	\$127.20	\$159.00	Accepted			Casper, Jennifer
10/27/2019	D7140(#1, #16) MCARS: Carson, Marie Extraction Reviewed Medical History - no changes needed. Tooth or teeth numbers: 1,16			MCARS	SOUTH	New Treatment Plan	Phase 2	\$30.00	\$120.00	\$150.00	Completed			Casper, Jennifer
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (ele...	1		MCARS	SOUTH	New Treatment Plan	Phase 2	\$125.00	\$25.00	\$150.00	Completed			Casper, Jennifer
10/27/2019	D7140 - Extraction, erupted tooth or exposed root (ele...	16		MCARS	SOUTH	New Treatment Plan	Phase 2	\$125.00	\$25.00	\$150.00	Completed			Casper, Jennifer
10/10/2019	D2750(#3) MCARS: Carson, Marie Treatment Rational Type of procedure - Type of procedure - Is this initial placement?			MCARS	SOUTH	New Treatment Plan	Phase 1	\$145.70	\$861.30	\$1,007.00	Proposed			Casper, Jennifer
10/10/2019	D2750 - Crown - porcelain fused to high noble metal	3		MCARS	SOUTH	New Treatment Plan	Phase 1	\$145.70	\$861.30	\$1,007.00	Proposed			Casper, Jennifer
08/30/2019	[#8, #9] MCARS: Carson, Marie Reviewed Medical History - changes noted on medical history form. Teeth 8 and 9 were kn			MCARS	SOUTH	New Treatment Plan	Phase 1	\$145.70	\$861.30	\$1,007.00	Proposed			Casper, Jennifer

Now we are going to focus on one last element. **Completed Treatment**, which is special.

In CareStack, charting a completed treatment **IMMEDIATELY** posts the charge for that treatment.

There is **NO** secondary step to post to the Ledger, which is likely to be different from other software programs you've used.

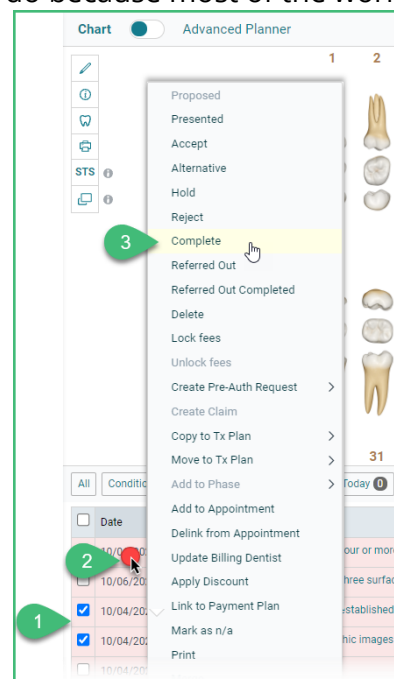


Completing a Planned Treatment

Completing a treatment that is already in the chart is the easiest to do because most of the work is already done. You simply:

1. Select the desired treatment(s)
2. Right click to open the menu.
3. Select **Complete**.

If the treatment you are completing isn't linked to an appointment, CareStack will ask you to link the treatment to an appointment or include a Date of Service.



When you complete your treatment, the status officially becomes **Completed**.

If you have your chart details color-coded by status, the treatment's row will have your practice's designated color.

Most importantly, the charges are posted to the ledger.

Date	Treatment	Charge	Insurance	Balance	Status	Provider
03/15/2021	D1206 - Topical application of fluoride varnish	\$35.00	\$0.00	\$35.00	Completed	Casper, Jennifer
03/15/2021	D1110 - Prophylaxis - adult	\$0.00	\$78.00	\$78.00	Completed	Casper, Jennifer
03/15/2021	D0274 - Bitewings - four radiographic images	\$50.00	\$5.00	\$55.00	Completed	Casper, Jennifer
03/15/2021	D0120 - Periodic oral evaluation - established patient	\$50.00	\$0.00	\$50.00	Completed	Casper, Jennifer
08/10/2020	D1110 - Prophylaxis - adult	\$0.00	\$78.00	\$78.00	Completed	Casper, Jennifer
08/10/2020	D0274 - Bitewings - four radiographic images	\$50.00	\$5.00	\$55.00	Completed	Casper, Jennifer
08/10/2020	D0120 - Periodic oral evaluation - established patient	\$50.00	\$0.00	\$50.00	Completed	Casper, Jennifer
03/12/2020	D0220 - Intraoral - periapical first radiographic image	\$0.00	\$25.00	\$25.00	Completed	Casper, Jennifer
03/12/2020	D0140 - DNTIN: Tin, Dennis Emergency Exam Reviewed H					Casper, Jennifer

Video Reference: <https://vimeo.com/641315698>

Charting Completed Treatments

You can chart completed treatments the same way you chart existing and planned treatments, just make sure your **Treatment Type** is set first. You will also want to choose an appointment to link the treatment to if you have one.

Toones, Loonie (1328) | 31y 6m | Male **INS.H** **RP** Clinical Summary
 09/30/2021 - 10:20 AM-11:00 AM - PEPPR: Pepper, Doctor - SOUTH : South 0 ✕ ▼
Scheduled View Details
 Date of Service : 09/30/2021 Location : SOUTH
 Provider : Pepper, Doctor Billing Dentist : Pepper, Doct ▼
 Treatment Type : ☐ Planned ☐ Existing ☒ Completed
 Care Panel Type : General Dentistry +Code +Note
 EXAM X-RAYS QUICK PA PROPHY / FL ADULT RECALL CHILD RECALL

From there, you can run with it.

1. Pick your **tooth** or teeth.
2. Pick your element from the **Care Panel** or **+Code** slider.
3. Add any **details** if required.

Morning, August (1075) | 33y 5m | Male **INS.H** **RP** Clinical Summary
 Select Appointment ▼
 Date of Service : 09/28/2021 Location : Downtown ▼
 Provider : Casper, Jenn Billing Dentist : Pepper, Doct ▼
 Treatment Type : ☒ Planned ☐ Existing ☐ Completed
 Care Panel Type : General Dentistry +Code +Note
 EXAM X-RAYS QUICK PA PROPHY / FL ADULT RECALL CHILD RECALL
 COM AMALGA NIGHTGUARD SEAL/PREV- REST PERIO/ S R P
 D2140 - Amalgam - one surface, primary or permanent **Tooth# : 13**
 Treatment Type : ☒ Planned ☐ Existing ☐ Completed
 Surface is Mandatory
☒ Class 1 ☐ Class V Regular Supernumerary

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
			A	B	C	D	E	F	G	H	I	J			
			T	S	R	Q	P	O	N	M	L	K			
32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17

 MO DO MOD ML DL
 Cancel Skip Apply Apply for All

If you forget to choose your appointment, CareStack will remind you with a warning. Click Cancel to go back and choose your appointment from the drop-down list.

Warning
 Codes being completed are not linked to an appointment but a Date of Service. Do you want to proceed?
 Cancel Proceed

Video Reference: <https://vimeo.com/642105176>