

Treatment Planning

Overview

You can't throw a list of treatments at a patient and expect them to see it as a strategy for improving their health.

It would be like building a house without a blueprint.

Patients need to see how these treatments come together into true plan, complete with timeline and cost. So, what is the plan? Just as buildings are as unique as the architect, treatment plans are as unique as their creator.

The plan is up to you. The way you organize the treatments, though, can impact how long the insurance lasts, or when the patient is able to have the treatment. You might organize treatment into groups by:

- ≡ Diagnosis
- ≡ Provider or specialist
- ≡ Status -recommended, alternative, required
- ≡ Tooth, area, or quadrant
- ≡ Appointment

Building Tools

You entered the patient's recommended treatments into the chart as planned treatments. Now you need to turn that list of treatments into a structured blueprint.

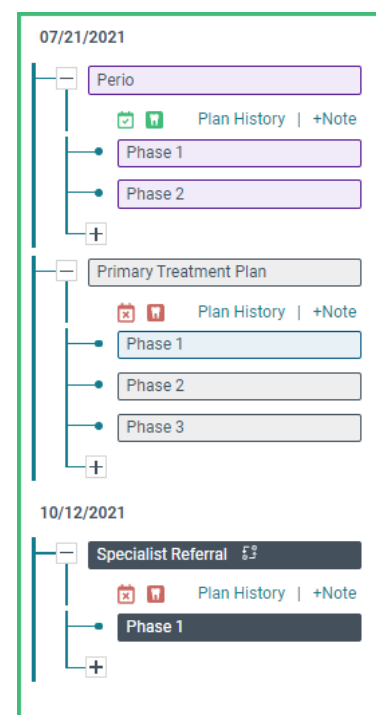
The first step is to gather the treatments into a **treatment plan group**. The group gives the initial structure to the treatments and organizes them together.

A patient can have more than one treatment plan, depending on the patient's needs. Look at this blueprint.

This patient has three separate treatment plans, a perio plan, a primary plan, and a plan to be referred to a specialist.

Each plan is further divided and organized into smaller sub-sections called **Phases**.

- ≡ The perio plan has two phases
- ≡ The primary plan has three
- ≡ The specialist referral plan has only one



With these plans and phases, the patient will see how the treatment will progress in the blueprint.

1	Date	Code	B.O.	Th/Area	Surf.	Provider	Location	Pat Est	Ins Est	Fee	Status
	17 Nov 2020	D3330 - Endodontic therapy, molar (excluding final ...	D	15		PEPPR	UNI	\$265.29	\$661.15	\$926.44	Proposed
Phase 1 Estimate								\$265.29	\$661.15	\$926.44	
3	17 Nov 2020	D2752 - Crown - porcelain fused to noble metal	D	15		PEPPR	UNI	\$190.80	\$763.20	\$954.00	Proposed
	17 Nov 2020	D2950 - Core buildup, including any pins when requ...	D	15		PEPPR	UNI	\$48.55	\$194.19	\$242.74	Proposed
Phase 3 Estimate								\$239.35	\$957.39	\$1,196.74	
4	17 Nov 2020	ZD2000 - Deliver Crown	N	15		PEPPR	UNI	\$0.00	\$0.00	\$0.00	Proposed
Phase 4 Estimate								\$0.00	\$0.00	\$0.00	
Total Estimate - \$2,123.18											
Insurance		Deductible Used	Deductible Rem.	Individual Max. Rem.	Insurance Rem. after plan		Patient Estimate		\$504.64		
Anthem Sapphire		\$100.00	\$100.00	\$2,500.00	\$881.46		Insurance Estimate		\$1,618.54		
		\$0.00	-	-	-		Total Estimate for Plan		\$2,123.18		

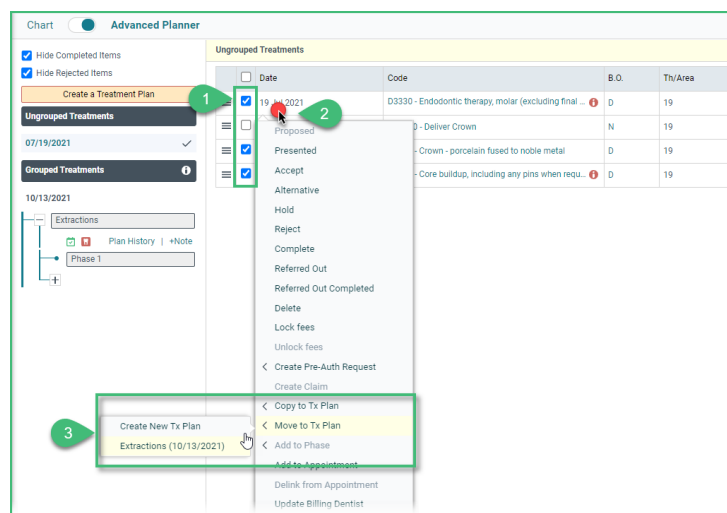
CareStack's flexible clinical tools let you create that blueprint from either the Chart or from the Advanced Planner. They both give you the tools you need to create the treatment blueprint.

Video Reference: <https://vimeo.com/634662866>

Build Treatment Plans

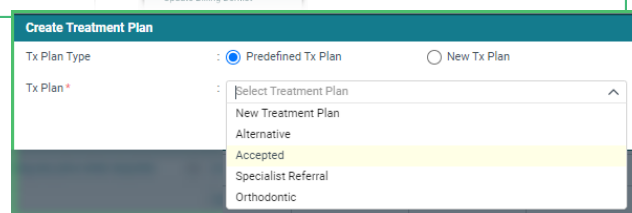
Let's build treatment plans from your planned treatments. Whether you decide to work from the **Advanced Planner** or the **Chart**, your steps are the same:

1. Select the treatment(s) to be added to the group.
2. **Right-click** near the selected treatment to open the pop-up menu.
3. Select **Move to Tx plan**.
4. Select **Create New Tx Plan** or select an existing plan. If you are creating a new plan group, you'll be asked if you want to use a Predefined plan group or a new plan.



The predefined ones save you some typing and encourage consistency across your practice. Just pick one from the drop-down list.

If those don't work for you, you can create your own plan name and decide the status.



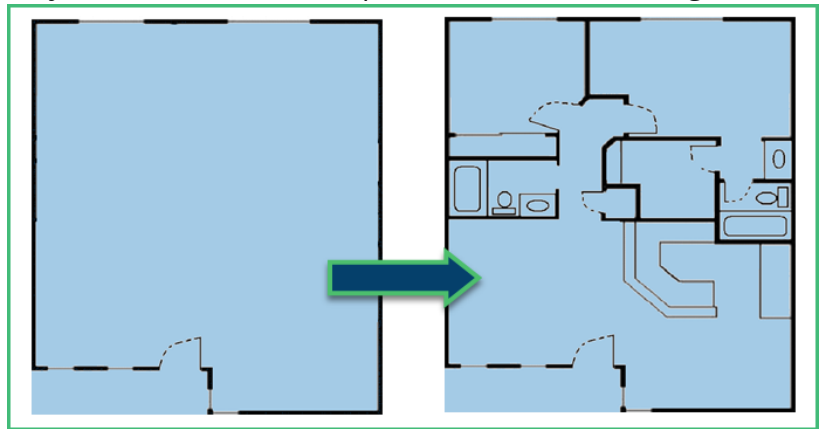
Video Reference: <https://vimeo.com/634660950>

Phase Treatment Plans

By moving treatments into a treatment plan, you've started the blueprint. There's something missing. It's not exactly a blueprint yet.

Most houses have more walls - separations between rooms by purpose. The kitchen, the bedrooms, bathrooms. You need more to have a true blueprint.

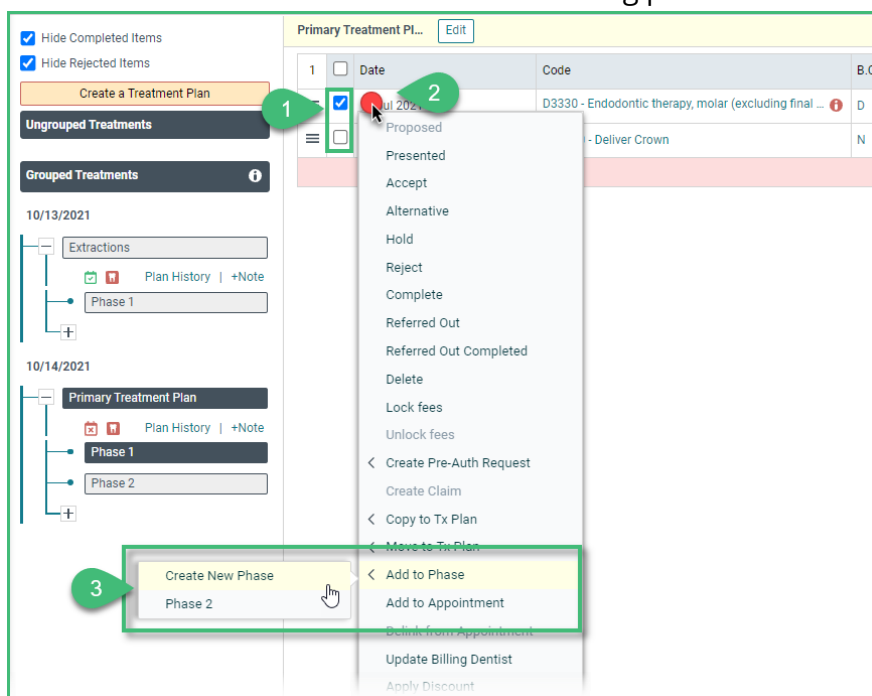
The same is true of treatment. Patients need to understand how that plan will be implemented. It makes more sense to see the parts within the whole.



You can divide the treatment plan further, whether by appointment, provider, diagnosis, or some other reason CareStack uses phases to breakdown the treatment plan.

As with creating the plan itself, you can add phases from the chart or from the advanced planner with nearly the same steps.

1. Select the treatment(s) to be added to the phase.
2. Right-click near the selected treatment to open the pop-up menu.
3. Select **Add to Phase**.
4. Select **Create New Phase** or select an existing phase.



Video Reference: <https://vimeo.com/634659819>

Building and Phasing with Drag and Drop

You've learned to turn the patient's long list of treatments into a coherent plan with phases -the blueprint for treatment, using your right click menu. Not everyone loves the right-click menu.

CareStack offers an alternative way to create your plans and phases without a single right click.

Drag and drop.

To use the drag and drop option, you'll need to be in the Advanced Planner since that is where the treatments have their little drag and drop handles.



To drag and drop:

1. Create your plan or phase if required.
2. Select your treatments.
3. Click the treatment handle and hold the mouse button down while you drag the treatments to their new spot.
4. Drop them there.

The screenshot shows the 'Advanced Planner' interface. On the left, there's a sidebar with 'Ungrouped Treatments' and 'Grouped Treatments'. The 'Grouped Treatments' section shows a timeline with 'Perio Treatment Plan' and 'Secondary Plan'. The 'Secondary Plan' is expanded, showing 'Phase 1' and 'Phase 2'. A table of treatments is displayed on the right. The table has columns: '1', 'Date', 'Code', 'B.O.', 'Th/Area', and 'Surf.'. The table contains several rows of treatment data. A green circle with the number '1' points to a plus sign in the sidebar. A green circle with the number '2' points to a checkbox in the table. A green circle with the number '3' points to a three-line menu icon in the table.

1	Date	Code	B.O.	Th/Area	Surf.
<input type="checkbox"/>	05 May 2021	D7240 - Removal of impacted tooth - completely bony	D	17	
<input type="checkbox"/>	05 May 2021	D7240 - Removal of impacted tooth - completely bony	D	32	
<input checked="" type="checkbox"/>	05 May 2021	D2750 - Crown - porcelain fused to high noble metal	D	3	
<input checked="" type="checkbox"/>	05 May 2021	D2150 - Amalgam - two surfaces, primary or perma...	D	30	DL
<input checked="" type="checkbox"/>	05 May 2021	D2160 - Amalgam - three surfaces, primary or perm...	D	28	MOL

You can use the drag and drop option to move treatments within and across phases to best manage the fees and the patient's benefits.

Video Reference: <https://vimeo.com/634663834>