



CADAT / CDAA Joint Annual Conference April 29 – 30, 2022



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Name of Course: Develop & Track Treatment Plans In Dentrrix Software

Course Content Outline / Educational Objectives:

This course will guide you thru setting up basic, complicated and alternate treatment plans to present to patients, along with the tools to track and update treatment plans as fees and insurance benefits change.

Managing treatment plan cases

- Create treatment plan case
 - Prioritize treatment
 - Identify the default treatment plan
- Create alternate treatment plans
 - Manage procedures in cases
 - Rename case
- Set case severity
- Update case status
 - Accept a case
 - Reject a case
 - Refer case to another provider
 - Complete a case
- Tracking case status
 - Importance of updating treatment cases
 - When to create a new treatment case
- Create default treatment plan case note
 - Insert case note
 - Set financing status
 - Set estimate expiration date
- View case insurance information
 - View primary insurance notes
 - View secondary insurance notes
 - View the insurance benefits summary
- Update treatment plan fees for the current patient



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Managing consent forms

- Attach a consent form to a case
 - Select information for consent
 - Add an additional note
- Sign a consent form
 - Practice signature
 - Saving consent forms
 - Identifying consent forms

Printing Treatment Case Reports

- Create, rename and delete report options
- Print the Patient Treatment Case report
- Print the Practice Treatment Case Report

Speaker Bio

Betty Houston is a practice management consultant who has worked in the dental industry for more than 25 years applying her education in Accounting and Finance to enhance the profitability of Dental Practices. She is dedicated to implementing best practices, promoting education in management systems and creating consistent strategies for growth and stability.

Betty is known for transforming struggling practices of all types into thriving profit centers, converting manual dental practices into computerized offices, and training staff in the implementation of efficient systems. Betty was a guest lecturer at the University of Southern California School of Dentistry for more than 20 years, and taught Practice Management there for 15 years. She has been a certified Dentrrix and Easy Dental trainer for over 20 years and a workshop instructor for over 15 years.