



Coaching Report

DATE: June 9, 2022
LOCATION: Lake Spokane Dental
LEARNER:

Reason for training: Treatment Planner and General Patient Consent

TRAINER: Tammi E.

TRAINING:

Reviewed/Trained on the following:

Treatment Planner/Consents

1. Overview

- Cases/Procedure Codes
 - Creating new cases
 - Setting a case as the default (bold blue color) – The case that new treatment goes into
 - Viewing/Hiding Complete and Rejected Cases
 - Moving codes from one case to another (click and drag)

2. Signing Consents

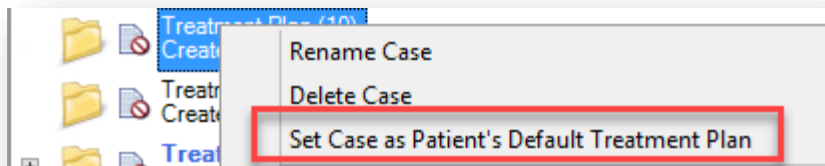
- Device functioning correctly
 - Made sure that ePad is working. If not, the best thing to do is close the consent box unplug it and plug it back in. Verify that **Interlink ePad II** is selected as the device (Settings >> Select Electronic Signature Device)
- General Treatment Plan Consents
 - **The consent is being signed when treatment is proposed.** However, the patient does not have to agree to the proposed treatment and may revoke consent at any time. If things change after the general consent is signed, that's where informed consent comes in. If there are changes from the proposed treatment, then those changes should be discussed with the patient, but that doesn't require another general consent. The provider should always have a discussion with the patient of the needed treatment.



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Dental: General Treatment Consent Workflow (*Rough Draft*)

1. Open Treatment Planner before you begin entering treatment plan. *A good time to do this is right after the Medical History Review.*
2. Create a new default case unless the patient's Treatment Planner has nothing in the default case. Pointers: You want to make sure that you don't have old treatment that patient has already signed for in that case. Your default case will be blue lettering. By right-clicking, you can choose to make the case default.



3. Minimize the Treatment Planner.
4. Go back to Patient's Chart and continue with patient's appointment. Enter in the needed treatment.
5. Once the treatment plan is entered (including codes for today's visit) and provider has discussed needed treatment, return to the Treatment Planner (*return easily from the taskbar*).
6. Click on the default case (*if it isn't selected already*).
7. Click on the Consent Forms button.



8. Offer the laminated copy of the General Informed Consent Form to the patient to read.
9. Under Select Consent Form: Select "1. Consent for Treatment" and click Add.

Dentrix Consent Forms

Forms for selected Case:

Informed Consent

Date	Consent Form	Signatures

Remove Selected

Select Consent Form: Add

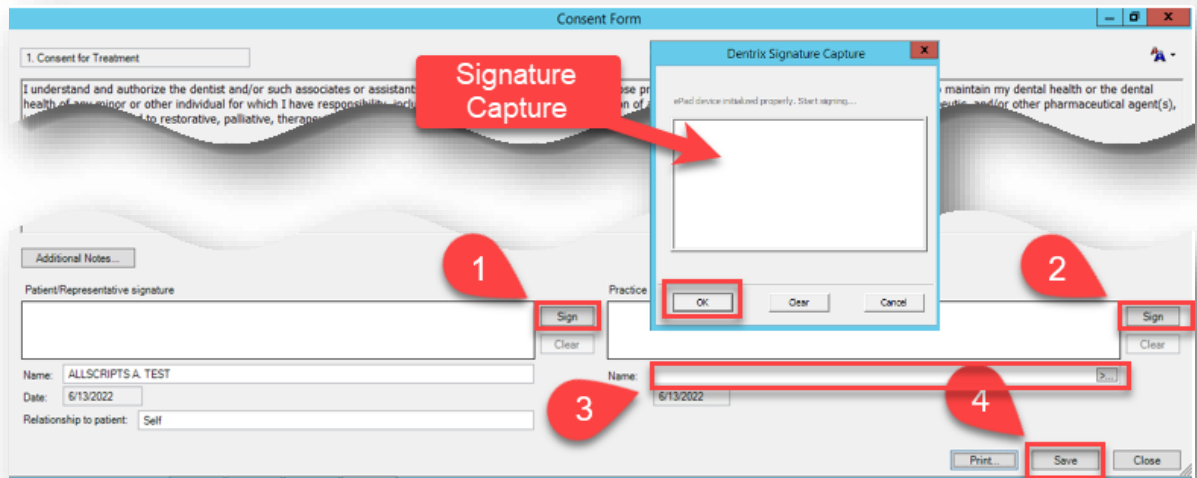
Note: Once a Consent form has been signed by a patient, the treatment case that the form is attached to cannot be deleted.

Close



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10. In the "Patient/Representative signature section, click "Sign" (1). Give patient the digital signature pad to sign. Click OK.



11. Under Practice signature section, click "Sign" (2). Sign yourself and click OK.
12. Type in your initials or click the arrow and look up your provider number (3).
13. Click Save and close the Treatment Planner (4).
14. If the patient desires a copy, inform the front office staff at check out to print for patient from the Document Center.

- Other Consents
 - If a patient is needing to sign for specific treatment like Endo, Oral Surgery, etc. then that treatment must be moved to a **new** case before signing.
 - Note... the Dentrix screen can be moved over to the other screen, or a paper copy of the consent given for patient to review before signing. We will eventually have all consents laminated.
 - Label the case appropriately before having them sign. Include the type of treatment and the related tooth/teeth.



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Trainer Action Items

Work to get final approval on General Treatment Consent Workflow and add to Intranet >>
Dentrix Workflows for staff reference.

COMMENTS:

Thank you for taking time to meet with me!

You are a valuable asset to the Lake Spokane Dental Team and clinic patients! Thank you for your commitment and all you contribute!

Trainer Signature:

Learner