



Training Workbook

PracticeWorks Charting Module,
a Sensei Product

Your Guide to a Successful Transition

carestreamdental.com
800.944.6365

PracticeWorks Charting Module

Training Workbook

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Introduction

You can use this workbook to become acquainted with the PracticeWorks Charting Module, a Sensei product, before, during, and after training.

Skill Sharpeners

The software comes with a tutorial, which contains data. The exercises in each lesson enable you to use the data and add your own. After you complete the exercises, you can reset the tutorial data to its original state.

Use the PracticeWorks Software Tutorial to do the skill sharpeners.

Accessing the Tutorial

To access the tutorial:

- 1 Click **Start > All Programs > PracticeWorks > Tutorial > Tutorial**. The **Employee Login** window is displayed.
- 2 In the **Your initials** field, type **JEK**.
- 3 In the **Password** field, type **1234**.
- 4 Click **OK**. The **Practice Central** window is displayed.
- 5 To close **Close Practice Central**, click the **X**. The **Appointment Book** window is displayed.

Resetting the Tutorial Data

Reset the data in the tutorial when:

- You have completed an exercise, but you want to do it again.
- You have started an exercise, but you were interrupted. You are not sure at what point you were in the exercise, so you decide to start over.
- You have completed an exercise, but someone else in your office needs to practice on the same exercise.
- You are doing an exercise, but you make a mistake, and the data does not look like it is supposed to.

To reset the tutorial data, close the tutorial, and then select **Start > All Programs > PracticeWorks > Tutorial > Reset Tutorial Data**. The reset data utility runs.

Be sure to reset the data when you begin the exercises.

Backing Up Data

Back up your data every day. You should have a backup for each day of the week, with copies stored off-site. Keep your backups in a fire-resistant safe.

Note

The data in the tutorial might differ from the examples.

Note

Technical Support does not provide assistance on your backup procedures.

Lesson 1

Navigating the PracticeWorks Charting Module

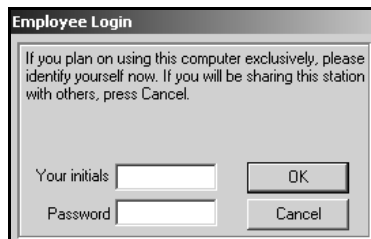
This lesson includes:

- Accessing Charting on page 1
- Closing Charting on page 4
- Understanding the Components of Charting on page 4
- Accessing Images on page 5

Accessing Charting

To open the PracticeWorks software:

- 1 Select **Start > All Programs > PracticeWorks > Tutorial > Tutorial**. The **Employee Login** window is displayed.



Employee Login

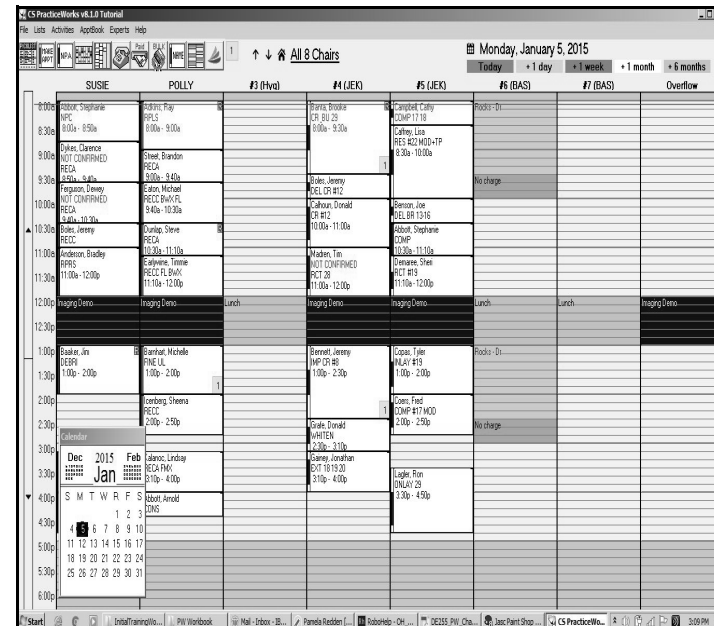
If you plan on using this computer exclusively, please identify yourself now. If you will be sharing this station with others, press Cancel.

Your initials: OK

Password: Cancel

- 2 For the software tutorial, type **JEK** in the **Your initials** field and **1234** in the **Password** field.
- 3 Click **OK**. Typically, the **Practice Central** window is displayed.

- 4 Click the **X** in the upper-right corner of the **Practice Central** window to close the window. The **Appointment Book** window is displayed.



You can access Charting from the **Appointment Book** window or the patient's clipboard.

Note

Displaying the **Practice Central** window is a **Miscellaneous defaults** option.

To access Charting from the Appointment Book:

- 1 Find an appointment you and right-click. The **Appointment Book Short-Cut Menu** is displayed:

| |
|-------------------------------|
| Clipboard for Adkins, Ray |
| Charting Module |
| Images |
| Launch Imaging |
| MedVisor |
| Route slip |
| Ledger |
| Check in |
| Check out |
| Reschedule/Cancel/Failed |
| Next appointment |
| Undo |
| Undo confirmed |
| Attach Yellow Sticky |
| Wait for doctor |
| Family info./scheduling |
| CareCredit Integration |
| Insurance Eligibility Service |
| View audit log |
| Properties |

- 2 Click **Charting Module**. The chart is displayed.



Phone Inquiry

To access Charting from the **Phone Inquiry** icon:

- 1 Select the **Phone Inquiry** icon from the toolbar. The **Select person on the phone** window is displayed.

Select person on the phone...

| Chart # | Name | Legal name | Age | Address | City | Phone | SSN | Type |
|---------|-------------------|------------|-----|------------------|---------|----------------|-------------|-------------|
| 0000402 | Abbott, Arnold Z | | 14 | 1004 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi |
| 0000402 | Abbott, David R | | 41 | 1004 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip |
| 0000901 | Abbott, Stephanie | | 40 | 1004 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0001400 | Adair, Jacob | | 38 | 1006 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0001400 | Adcock, Larry | | 28 | 1008 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0001600 | Adkins, Ray | | 32 | 1010 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0001900 | Aldrich, Richard | | 28 | 1012 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0001904 | Aldrich, Sandra | | 28 | 1014 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0002301 | Ailford, Paul | | 28 | 1016 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0003300 | Alvarez, Judy | | 46 | 1018 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0003402 | Amburgey, Damon | | 3 | 1022 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip |
| 0003402 | Amburgey, Kevin | | 43 | 1022 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |
| 0003402 | Amburgey, Susan | | 41 | 1022 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip |
| 0004301 | Anderson, Bradley | | 27 | 1026 Demo Street | Atlanta | w 123-456-7890 | 123-45-6789 | pi ip lw ip |

Find:

People to include

| | | | | |
|--|---|--|---|---|
| <input checked="" type="checkbox"/> Patients without insurance | <input checked="" type="checkbox"/> Responsible parties | <input checked="" type="checkbox"/> Lives with | <input checked="" type="checkbox"/> Show everyone | <input checked="" type="checkbox"/> Show active |
| <input checked="" type="checkbox"/> Patients with insurance | <input checked="" type="checkbox"/> Insured parties | <input type="checkbox"/> Referral sources | <input type="checkbox"/> Must be all | <input type="checkbox"/> Show inactive |

OK Cancel Add... Add family... Edit... Remove... Actions

- 2 Select the patient whose chart you want to see.
- 3 Select **Edit**.
- 4 Click **OK**. The clipboard is displayed.

Clipboard

Name: Adkins, Ray Legal name: [View...]

☒ Patient Lives with: ☒ self ☐ Other

Address: 1010 Demo Street

City: Atlanta State: GA ZIP: 30339

Phone H: 123-456-7890 W1: 123-456-7890 Daytime call: [View...]

C: [View...] W2: 123-456-7890

e-mail: [View...]

DOB: 11-09-1982 Sex: ☒ M ☐ F Marital: ☒ S ☐ M ☐ D ☐ W

Age: 32 SSN: 123-45-6789 Spouse: Unknown

Student: ☒ No ☐ Yes FT ☐ PT Where?: [View...]

Insurance Overview

Primary Dental: ABC Inc. Metropolitan Insurance

Sec Dental:

Prim Medical:

Sec Medical:

Responsible party: ☒ self ☐ Other A/R admin by: JEK Risk: [View...]

| Cur | 30 | 60 | 90 + 120 | Ptn. amt | Ins + w/O | Past due |
|--------|------|------|----------|----------|-----------|----------|
| 290.00 | 0.00 | 0.00 | 0.00 | 174.00 | 116.00 | 0.00 |

Plan balance: 0.00 Active Contract bal: 0.00

Primary doctor: JEK

☒ Complete ☒ Active Chart # 0001600 Owns production: JEK

Prescriptions Referrals Synapsheet Amz Charts

- 5 Click **Chart**.

The chart for the patient is displayed.

TUTOR: CS PracticeWorks Charting Module v9.0.0 for Ray Adkins, Tx Plan 4 Quads RP&C - 2006 (in progress)

Hard tissue | Soft tissue | Prog Notes | Tx Plan | Attached img | Capture | Layout

Activities | About...

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

32 31 30 29 28 27 26 25 24 23 22 21 20 19 18 17

W

Age: 32

Medical alerts: MVP

Pre-medication: Amoxicillin 500mg

Recall information:
Last recall: 09-13-13 (16 months ago)
Procedure: 01110 (Prophylaxis - Adult)
Due date: 03-13-14 (6 month cycle)
Next recall appt: None scheduled

Last radiographs:
Last Bitewings: 01-05-15
Last Full Mouth Series (FMS): 01-05-15
Last Panoramic: 01-05-15

Scheduled appointments:
Monday, 01-05-15 at 8:00a (RPLS)

Set Area to Admin records

Displayed Visit: 01-05-15 (65 of 65)

<<Prev Next>>

Post Work Close Chart

Tooth #32

✓ Show proposed tx ✓ Show image icons

Tx Plan... Attach... Rx... Forms... Note... Print...

Hygiene Basic Major Other Chart Mode

Oral Exm Prophy Perio Per Quad Perio Per Tooth Sealant RX

X-rays

Family Info

Clear Selected Teeth

Undo Last Entry

Existing

Completed

Proposed

by JEK

R

Image Not Accessible From This Location

PF, 01-05-2015 #30, 01-05-2015 #3, 01-05-2015 #30, 01-05-2015 #11, 01-05-2015 FM, 01-05-2015 #4, 10-19-2013

| Date | Area | Done by | Entry |
|----------|----------------|---------|---|
| 01-05-15 | Tooth #11 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #3 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-05-15 | Patient's face | JEK | Camera image (Unclassified) |
| 01-05-15 | Tooth #11 | JEK | NOTE: (W) Complaints of pain |
| 01-05-15 | Admin records | JEK | Standard Prescription: Amoxicillin 500mg Pre-Me |
| 01-05-15 | Upr left quad | JEK | Perio S/RP - 4+ Th/Quad (from ledger) |
| 01-05-15 | Entire mouth | JEK | Full Mouth Series (from ledger) |
| 01-05-15 | Entire mouth | JEK | Panoramic (from ledger) |
| 01-05-15 | Entire mouth | JEK | Bitewings - four (from ledger) |
| 01-05-15 | Upr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Upr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |

✓ Show image viewer View Setup Correct entry

Start | NewCh... | Outloo... | AT&T Gl... | RoboHe... | Untitled... | Skype... | Skype f... | Jasc Pai... | CS Prac... | DE255...

Important

Multiple users can now update a patient's record at the same time; the changes are saved, but the record is not refreshed automatically. If multiple users change the same field, only the most recent change to that field is saved.

Note

On most tabs, the **Post Work** button becomes active when you add a new procedure.

Closing Charting

To close Charting and return to the practice management software, click **Close Chart**.

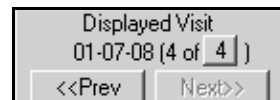
Understanding the Components of Charting

When you access Charting, the **Hard tissue** tab is active by default. Charting consists of the following tabs:

- **Hard tissue**—Used to document all pathologies and conditions, missing teeth, restorations, existing procedures, completed treatment, proposed treatment, clinical notes, forms, and prescriptions.
- **Soft tissue**—Used to enter the current periodontal condition of the patient, to view previous periodontal conditions, and to compare the periodontal conditions on different dates.
- **Prog notes**—Displays exam results, completed dental treatment, proposed treatments, and so forth. You can sort the entries by date or area. If you sort by area, the progress notes are grouped by tooth number, quadrants, and area of the mouth.
- **Tx Plan**—Displays the procedures in one or more treatment plans that have been, or will be, presented to the patient. The term *treatment plan* is abbreviated as TxPlan on tabs and buttons.
- **Attach(ed) img**—Used to attach images to the patient's chart and to view existing attached images.
- **Capture**—Acquires images from external devices and associates them with a patient's chart.

- **Layout**—Used to organize, view, and print different images together. You can also integrate x-ray and digital images into a single presentation.

The **Displayed Visit** area is on several of the tabs.



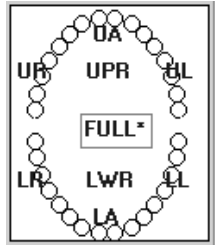
Each time you open Charting, the **Displayed Visit** area shows the current date and the visit number. If this is the first time you have seen the patient, or if you have never charted anything for this patient, the **Displayed Visit** area indicates that this is visit 1 of 1. If you make no changes to the chart, when you exit the software the chart is not saved. A visit is created when either an entry has been made on a chart or a note has been entered.

When you chart something for a patient, the chart is saved. The next time you open a chart for the patient, the **Displayed Visit** area indicates that this is visit 2 of 2. Use the <<Prev>> and <<Next>> buttons to move through the charts.

The **Hard tissue** tab and **Soft tissue** tab have separate charts. If there is a charting entry on the **Hard tissue** tab (composite, crown, and so forth), it creates a new soft tissue chart as well, even if no perio charting was done.

If note entries exist on the hard tissue charts without any actual charting, the number of charts vary.

The **Hard tissue** tab, the **Soft tissue** tab, the **Prog notes** tab, and the **Attach img** tab display the **Arch/Quad view**.



To see all progress notes for an area, right-click the area of the **Arch/Quad view** and select **All Progress Notes**.

The **Image Viewer** is displayed on the **Hard tissue** tab, the **Soft tissue** tab, the **Attach img** tab, the **Capture** tab, and the **Layout** tab.



Information about the patient is displayed on several of the tabs.

Age:
32

Medical alerts:
MVP

Pre-medication:
Amoxicillin 500mg

Recall information:
Last recall: 09-15-06 (16 months ago)
Procedure: 01110 (Prophylaxis - Adult)
Due date: 03-15-07 (6 month cycle)
Next recall appt: None scheduled

Last radiographs:
Last Bitewings: 01-07-08
Last Full Mouth Series (FMS): 01-07-08
Last Panoramic: 01-07-08

Scheduled appointments:
Monday, 01-07-08 at 8:00a (RPLS)

A portrait of the patient, if one is available, is displayed on every tab except the **Tx Plan** tab, the **Layout** tab, and the **Capture** tab.

Accessing Images

The PracticeWorks Charting Module now integrates with Carestream Dental's CS Imaging software. See your Carestream representative for more information.

Images are stored in a single database that is shared by PracticeWorks, Charting, and the imaging applications. If an image is modified in Charting or the imaging applications, it can be viewed in any application that uses it.

Note

The **Arch/Quad** view is referred to as a pictograph.

Skill Sharpeners—General Navigation

Exercise 1—Determine the Software Version

You have a question about Charting that you cannot find an answer for in **Help**, so you call technical support. The support person asks what version of the software you are using. How do you find out what version of Charting you have?

To determine your version of Charting:

- 1 In the PracticeWorks Charting Module, click the **About** button in the upper-right corner of any window. The **About** window is displayed.
- 2 Make a note of the version number listed in the window.
- 3 Click **OK**.

Exercise 2—Open a Patient Chart

Ray Adkins has an appointment this morning at 8:00 A.M. From your practice management software, open the chart for Ray Adkins.

To open the chart:

- 1 Select Ray Adkins's appointment at 8 A.M., and right-click. A menu is displayed.
- 2 Select **Charting Module**. Charting opens, displaying the chart for Ray Adkins.

Exercise 3—Find the Number of Prior Visits

Determine how many visits Ray Adkins has had before today for non-perio reasons. How many perio visits has he had before today?

To determine the number of hard-tissue visits and soft-tissue visits the patient has previously had:

- 1 Open Ray Adkins's chart. By default it opens on the **Hard tissue** tab.
- 2 Look at the **Display Visit** area. It says this is visit **4 of 4**. Therefore, Ray has had 3 previous visits.
- 3 Click the **Soft tissue** tab. The **Soft tissue** chart is displayed.
- 4 Look at the **Display Visit** area. It says this is visit **3 of 4**. Therefore, Ray has had 2 previous perio visits.

Lesson 2

Using the Hard Tissue Tab

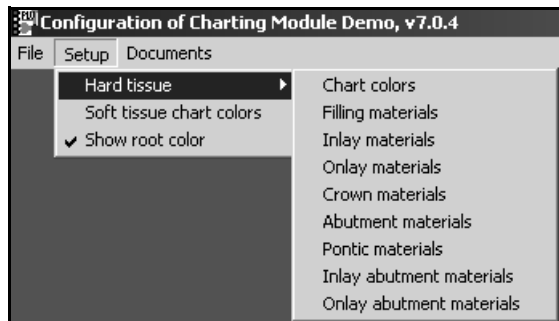
This lesson includes:

- Configuring options
- Changing screen resolution
- Understanding the **Hard tissue** windows
- Printing the hard tissue chart
- Sharing entries among tabs

Configuring Options

To configure colors, materials, and other settings for the **Hard tissue** tab:

- 1 Select **Start > All Programs > PracticeWorks > Configuration of Charting Module**. The **Configuration of Charting Module** window is displayed.
- 2 Select **Setup > Hard tissue**. The **Hard tissue** menu is displayed.



- 3 Select from the list of options.

- 4 Click **OK** to save each setting.
- 5 Select **File > Exit** to close the window.
- 6 Restart Charting to see the changes.

Changing Screen Resolution

Screen resolution controls what you can see on your screen. For example, if your screen resolution is set to 800 X 600, the progress notes area of the **Hard tissue** tab—in the lower-right quadrant—displays the history of a tooth or an area of the mouth. If your resolution is set to 1024 X 768, however, the progress notes display the history of the entire mouth.

To change screen resolution:

- 1 Select **Start > Control Panel**. The **Control Panel** window is displayed.
- 2 Double-click **Display**.
- 3 Click **Adjust resolution**.
- 4 Adjust the settings, and click **OK**.

Note

The resolution also needs to be configured in the PracticeWorks software.

Understanding the Hard Tissue Window

When you open Charting, the **Hard tissue** tab is selected by default.

TUTOR: CS PracticeWorks Charting Module v9.0.0 for Ray Adkins, Tx Plan 4 Quads RP&C - 2006 (in progress)

Hard tissue | Soft tissue | Prog Notes | Tx Plan | Attached img | Capture | Layout

Activities | About...

Age: 32
Medical alerts: MVP
Pre-medication: Amoxicillin 500mg
Recall information:
Last recall: 09-13-13 (16 months ago)
Procedure: 01110 (Prophylaxis - Adult)
Due date: 03-13-14 (6 month cycle)
Next recall appt: None scheduled
Last radiographs:
Last Bitewings: 01-05-15
Last Full Mouth Series (FMS): 01-05-15
Last Panoramic: 01-05-15
Scheduled appointments:
Monday, 01-05-15 at 8:00a (RPLS)

Set Area to Admin records
Displayed Visit: 01-05-15 (65 of 65)
<<Prev Next>>
Post Work Close Chart

Tooth #9

Hygiene | Basic | Major | Other | Chart Mode

Oral Exm | Prophy | Perio Per Quad | Perio Per Tooth | Sealant | RX | Clear Selected Teeth | Existing | Completed | Proposed | by JEK

X-rays | Family Info | Undo Last Entry

Image Not Accessible From This Location

| Date | Area | Done by | Entry |
|----------|----------------|---------|---|
| 01-05-15 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-05-15 | Patient's face | JEK | Camera image (Unclassified) |
| 01-05-15 | Tooth #11 | JEK | NOTE: (w) Complaints of pain |
| 01-05-15 | Admin records | JEK | Standard Prescription: Amoxicillin 500mg Pre-Me |
| 01-05-15 | Upr left quad | JEK | Perio S/RP - 4+ Th/Quad (from ledger) |
| 01-05-15 | Entire mouth | JEK | Full Mouth Series (from ledger) |
| 01-05-15 | Entire mouth | JEK | Panoramic (from ledger) |
| 01-05-15 | Entire mouth | JEK | Bitewings - four (from ledger) |
| 01-05-15 | Upr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Upr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Tooth #8 | JEK | Sealant on I |
| 01-05-15 | Tooth #9 | JEK | Sealant on I |
| 01-05-15 | Tooth #29 | JEK | Sealant on O |

Show image viewer View Setup Correct entry

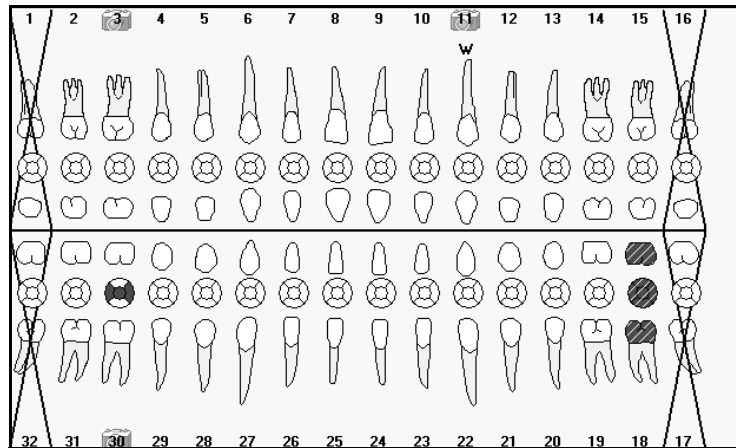
taskbar: NewCh... N X Outloo... AT&T Gl... RH RoboHe... Untitled... Skype f... Skype f... Jasc Pai... CS Prac... DE255...

The **Hard tissue** window is made up of the following areas:

- Tooth chart
- Charting palettes
- Charting modes
- Progress notes

Tooth Chart

The largest part of the window displays the tooth chart, in which you select individual teeth for charting.



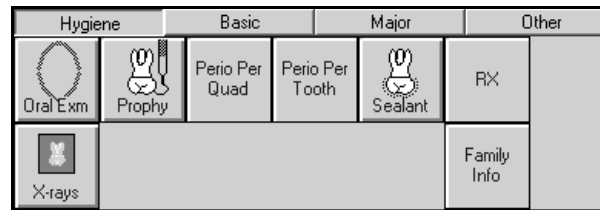
Charting Buttons

Charting buttons can be configured to your preferences.

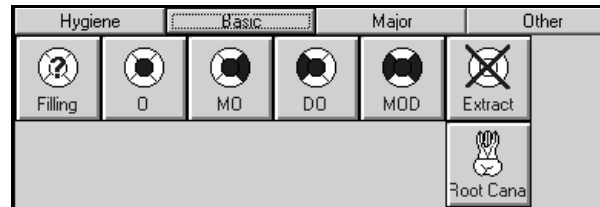
Below the tooth chart are the Charting palettes, which display buttons to document restorations and conditions for a tooth, quadrant, or area of the mouth.

At the top of the toolbar are four tabs—**Hygiene**, **Basic**, **Major**, and **Other**. These tabs can be customized.

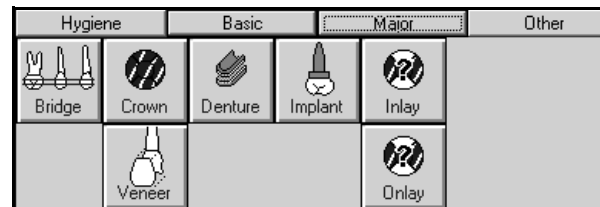
Select **Hygiene**, and the following buttons are displayed:



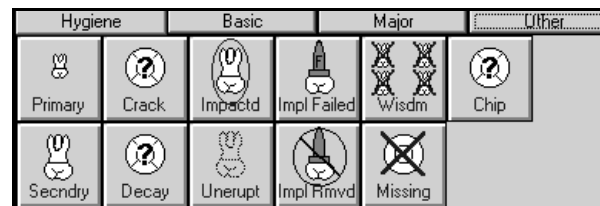
Select **Basic**, and the following buttons are displayed:



Select **Major**, and the following buttons are displayed:



Select **Other**, and the following buttons are displayed:



Over forty system-defined buttons are available, including **Bridge**, **Fracture**, **Impacted**, and **Sealant**.

Note

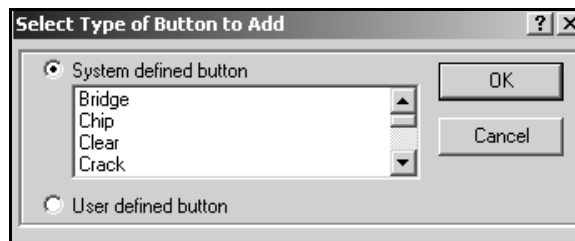
By default, charts for patients under 10 years of age automatically display deciduous teeth. The age, however, can be customized. This enables you to track the loss of primary dentition.

To add a system-defined button to a palette:

- 1 Right-click on a blank area of a palette, and a menu is displayed.



- 2 Select **Add Button**. The **Select Type of Button to Add** window is displayed.



- 3 Scroll through the list to select the button you want to add.
- 4 Highlight the selection, and click **OK**. The button is added to the palette.

To delete a button:

- 1 Right-click on the button you want to delete. A menu is displayed.
- 2 Click **Remove Button**.

Note

You cannot change the name or the properties of a system-defined button.

Selecting the Appropriate Charting Mode

There are three Charting modes:

- Existing
- Completed
- Proposed

To choose a Charting mode, select the option.

Using the Chart Existing Mode

Existing entries have occurred in the past. The first time you chart an existing entry on a new patient, you are asked to enter the date of the patient's first visit. If the date you enter is today's date, the software knows this is the patient's first visit to your office, and these entries are attributed to **Other office**.

If an earlier date is entered, the system assumes you are updating your electronic chart, and prompts you for the date and producer of each entry. If this is not the patient's first visit, and you enter a date earlier than today, the **Service Date for Existing Entry** window is displayed each time you make an entry. Click **OK** to enter existing conditions for the current visit.

If you have entered today's date, selected an in-house producer, and have set the mode to **Chart existing**, the system considers any restorative entries to be **Chart completed**. A window is displayed to remind you that the existing work is considered complete. This window also displays at the beginning of each subsequent restorative entry. To avoid this window, switch to **Chart completed** mode for entering work done today.

Pathologies should always be charted as existing.

Using the Chart Completed Mode

This mode is available only when you begin charting from an appointment on today's date that has not been checked out in the system. This limits completed entries to work done today on patients who have an appointment today. Completed entries are posted back to the **Check Out Ledger** after the patient's chart is closed.

Using the Chart Proposed Mode

This mode is used to document specific treatments that you propose to the patient. Proposed treatments are displayed in red on the tooth chart. The entries also appear automatically on the **Tx Plan** tab, along with the correct ADA codes and related information. When you exit the patient's chart, you are prompted to create a treatment plan using the treatments you selected while in this mode.

Progress Notes

Progress notes can be displayed per tooth by double-clicking the tooth in the tooth chart. To see quadrant-specific entries, double-click on the quadrant in the pictograph. To view full-mouth entries, double-click **Full** in the pictograph.

When your screen resolution is at least 1024 x 768, progress notes are displayed in the lower-right quadrant of the **Hard tissue** tab.

| Date | Area | Done by | Entry |
|----------|----------------|---------|---|
| 01-07-08 | Tooth #11 | JEK | Generic image (Unclassified) |
| 01-07-08 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-07-08 | Tooth #3 | JEK | Generic image (Unclassified) |
| 01-07-08 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-07-08 | Patient's face | JEK | Camera image (Unclassified) |
| 01-07-08 | Tooth #11 | JEK | NOTE: (W) Complains of pain |
| 01-07-08 | Admin records | JEK | Rx Amoxicillin |
| 01-07-08 | Upr left quad | JEK | Perio S/RP - 4+ Th/Quad (from ledger) |
| 01-07-08 | Entire mouth | JEK | Full Mouth Series (from ledger) |
| 01-07-08 | Entire mouth | JEK | Panoramic (from ledger) |
| 01-07-08 | Entire mouth | JEK | Bitewings - four (from ledger) |
| 01-07-08 | Upr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-07-08 | Lwr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-07-08 | Upr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-07-08 | Lwr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |

☒ Show image viewer View Setup Correct entry

Progress notes reflect the entries made in Charting, including exam results, completed treatment, and treatment plans.

Printing the Hard Tissue Chart

To print the hard tissue chart:

- 1 Click **Print**. The **Print hard tissue chart** window is displayed.

Print hard tissue chart

Print from 01-04-10 to 01-04-10
(blank for all)

☒ Print graphical chart
☐ Print legend

☒ Include proposed tx on graphical chart
☒ List proposed tx in progress notes
☒ List note entries
☒ List form entries
☐ List administration records

OK Cancel

- 2 Select the elements you want to print, and click **OK**.

Sharing Entries Among Tabs

The **Hard tissue** tab interacts with other parts of Charting in the following ways:

- Teeth charted as missing on the **Hard tissue** tab are displayed as missing on the **Soft tissue** tab and **Attach(ed) Images** tab.
- Proposed treatments entered on the **Hard tissue** tab are displayed on the **Tx Plan** tab.
- Proposed treatments entered on the **Tx Plan** tab can be converted to a treatment plan on the **Hard tissue** tab.
- If a patient has more than one treatment plan, the one currently selected on the **Tx Plan** tab is displayed on the **Hard tissue** tab.
- If the patient's portrait is displayed on the **Capture** tab or the **Clipboard** in the practice management software, the portrait is also displayed on the **Hard tissue** tab.
- Camera icons appear on the **Hard tissue** tab for images that are attached to a specific tooth or area on the **Attach(ed) Images** tab.
- Each entry made on the **Hard tissue** tab is shown as a text entry on the **Prog Notes** tab.
- Entries charted as **Completed** on the **Hard tissue** tab are transferred to the **Check Out Ledger** when the chart is closed.
- The **Forms** and **Notes** buttons are the same on the **Hard tissue** tab, the **Soft tissue** tab, and the **Prog Notes** tab.

Skill Sharpeners—Using the Hard Tissue Tab

Exercise 1—Printing a Chart

Print the **Hard tissue** chart and its legend for Ray Adkins.

To print the chart and its legend from the **Hard Tissue** tab:

- 1 With the chart for Ray Adkins open, click the **Hard tissue** tab. The **Hard tissue** window is displayed.
- 2 Click **Print** on the right side of the window. The **Print hard tissue chart** window is displayed.
- 3 Select only **Print graphical chart** and **Print legend**.
- 4 Click **OK**.

Exercise 2—Making Entries

Ray Adkins has a pain in tooth #22. Take an x-ray of the tooth and create a note documenting the findings.

To document that an x-ray has been taken of tooth #22, and simultaneously create a note of it:

- 1 Select **Mode Completed**.
- 2 On the **Hard tissue** tab, click tooth #22. The tooth is highlighted.
- 3 Click in the **Hygiene** section of the toolbar. The buttons related to hygiene are displayed.
- 4 Click **X-rays** and click **OK**. The **Additional entries for area FM** window is displayed.
- 5 Select **Procedure 00220 (Periapical single, first)** and click **OK**. The **History Entry** window reflects the x-ray of tooth #22.

Exercise 3—Charting a Crack on a Tooth

The x-ray of tooth #22 shows a slight crack on the distal surface. Indicate this condition on the hard tissue chart.

To chart a crack on the distal surface of tooth #22:

- 1 Click the **Other** toolbar to show the buttons for other conditions. The **Other** toolbar is displayed.
- 2 Click tooth #22 on the chart. The tooth is highlighted.
- 3 Click the **Crack** button. The **Service Date for Existing Entry** window is displayed.
- 4 Click **OK**. The **Select cracked surfaces** window is displayed.
- 5 Click **D**, and then click **OK**. The **Additional entries for tooth #22** window is displayed.
- 6 Select **Sensitivity of tooth**, and click **OK**. The **Sensitivity of tooth** window is displayed.
- 7 Verify that the tooth number is correct, and click **OK**. The **Attach note to patient chart** window is displayed.
- 8 Add the following phrase to the note: **Crack detected by x-ray**.
- 9 In the **Type** area of the window, select **Watch**.
- 10 In the **Show character(s) on** section of the window, select **Display on hard tissue chart** and **Display on soft tissue chart**.
- 11 Click **OK**. The **Check Spelling** window is displayed.
- 12 Click **Ignore** if you have typed the words correctly. When spell check has finished, the **Display Character Missing** window is displayed.
- 13 Click **Yes**.

The **Hard tissue** tab window is displayed again. A graphical representation of the condition is on tooth #22. A note has been created and is available for review in the **Note** section.

Exercise 4—Reversing an Entry

Remove the entry you just made. To undo an entry:

- 1 Select an entry.
- 2 Click **Correct entry** in the lower-right corner of the window. The **Correct Chart Entry** window is displayed.
- 3 Select **Remove entry**, and click **Make correction**. The **Verify Remove Entry** window is displayed.
- 4 Click **Yes**.

Lesson 3

Using the Soft Tissue Tab

This lesson includes:

- Overview on page 15
- Moving Around the Soft Tissue Tab on page 15
- Understanding the Soft Tissue Window on page 16
- Viewing the Soft Tissue Chart on page 17
- Making Entries to the Soft Tissue Chart on page 19
- Printing the Soft Tissue Chart on page 20
- Recording PSR Scores on page 20
- Sharing Entries among Tabs on page 21
- Viewing Statistics on page 21

Overview

The **Soft tissue** tab is used to enter the current periodontal condition of the patient, to view the patient's periodontal condition on any previous visit, and to compare the patient's condition on different visits. On this tab, you can record and display pocket depths, bleeding, calculus, suppuration, plaque, and recession measurements on six sites per tooth. You can also chart furcation and mobility, attached gingiva, and calculus.

Pocket depths and recession measurements can be displayed separately or combined as total tissue loss. The measurements can be shown as a bar graph, a line graph, or numerically. The

numeric measurements can be displayed as absolute measurements or as changes from a previous visit.

Click **PSR** to record a PSR score.

Moving Around the Soft Tissue Tab

The software charts periodontal conditions in the following order:

- 1–16 Buccal
- 16–1 Lingual
- 32–17 Buccal
- 17–32 Lingual

When you click a tooth on the **Soft tissue** tab, information about that tooth is displayed.

If you use the arrow keys on the keyboard and the chart is the active area of the **Soft tissue** tab, the chart follows the progression outlined above. The **Othr** pointer is always trailing one site behind the charting site. The **Other** pointer is generally used to chart bleeding, suppuration, plaque, and calculus.

As you make an entry at each site, the pointers and data location move automatically to the next site.

If you are in **Attached Gingiva** mode, the <<Prev>> or <<Next>> buttons move you from tooth to tooth. If you are in **Pocket** mode, the <<Prev>> or <<Next>> buttons move you from site to site.

Click the **Soft tissue** tab, and the **Soft tissue** window is displayed.



The **Soft tissue** window contains the following tooth chart area:

The following codes for conditions are displayed on the tooth chart:

- **Pckt** for pocket depth
- **Rec** for recession
- **AttG** for attached gingiva
- **Furc** for furcation
- **Mobl** for mobility
- **Bled** for bleeding
- **Supr** for suppuration
- **plaQ** for plaque
- **Calc** for calculus

Below the tooth chart is the measurement area.

Use the left side of the window to select the charting mode, and use the numbers to enter depths.

The middle section shows the measurements for a tooth.

Viewing the Soft Tissue Chart

The default view of the soft tissue chart is **All Readings, single visit (data entry)**. This choice is displayed by default on the drop-down list below the lower-right corner of the tooth chart on the **Soft tissue** tab.

Click on the drop-down list, and you can select other views:

Note

Typically, you enter the depth measurements of 1 to 9 with the numbers on the keyboard.

The following options are available from the drop-down list:

- **No readings (bare chart)**—Shows the teeth that are present, crowned, bridged, or implanted, and displays notes, but does not display perio readings or horizontal grid lines at the roots.
- **Pocket depth, numeric, selected visits**—Illustrates the pocket depth measurements for as many as three visits.
- **Pocket depth, numeric (change)**—Illustrates the differences in pocket depths among as many as three different visits.
- **Attached gingiva, numeric, selected visits**—Same as **Pocket depth, numeric, selected visits**, but with attached gingiva readings.
- **Attached gingiva, numeric (change)**—Same as **Pocket depth, numeric, selected visits**, but with attached gingiva readings.
- **Furcation, numeric, selected visits**—Same as **Pocket depth, numeric, selected visits**, but with furcation readings.
- **Furcation, numeric (change)**—Same as **Pocket depth, numeric (change), selected visits**, but with furcation readings. Displays the readings in appropriate sites on each tooth. Some teeth may have no readings.
- **Mobility, numeric, selected visits**—Same as **Pocket depth, numeric, selected visits**, but with mobility readings. There is only one mobility reading per tooth. It is displayed on the buccal middle site on each tooth.
- **Mobility, numeric (change), selected visits**—Same as **Pocket depth, numeric (change), selected visits**, but with mobility readings. There is only one mobility reading

per tooth. It is displayed on the buccal middle site on each tooth.

- **Pocket depth, line graph, two visits**—The two visits are displayed in different colors.
- **Recession, numeric, selected visits**—Illustrates the recession measurements for up to three visits.
- **Recession, numeric (change), selected visits**—Shows the differences in recession measurements for up to three visits.
- **Recession, line graph, two visits**—Illustrates changes in recession. The two visits are displayed in different colors.
- **Total tissue loss, numeric, selected visits**—Illustrates total tissue loss for up to three selected visits.
- **Total tissue loss, numeric (change), selected visits**—Illustrates the difference in total tissue loss for up to three visits.
- **Total tissue loss line graph**—Illustrates total tissue loss: recession plus pocket depth.
- **Bleeding, selected visits**—Shows the bleeding dots for up to three visits.
- **Suppuration, selected visits**—Shows suppuration for up to three visits.
- **Plaque, selected visits**—Shows the plaque dots for up to three visits.
- **Calculus, selected visits**—Shows the calculus dots for up to three visits.
- **PSR Scores, selected visits**—Shows PSR scores for up to three visits.

Making Entries to the Soft Tissue Chart

When charting the patient's periodontal condition, you have the following ways to enter data into the chart:

- You can click on the numeric keypad on the tab.
- You can use the number pad or the numbers on the keyboard.
- You can use your electronic probe.

How you see the soft tissue chart depends on the display option you select from the drop-down list. When **All readings, single visit (data entry)** is selected, you have the ability to add perio chart information.

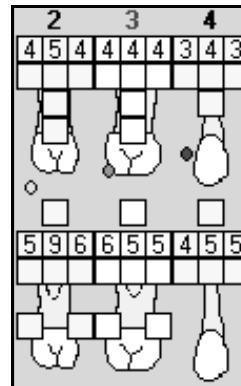
To chart the patient's periodontal condition:

- 1 Select a producer from the drop-down list to indicate who performed the examination.
- 2 On the **Soft tissue** tab, select the tooth area to chart. A rectangle with pointers appears around the site.
- 3 In the measurement area, select the condition you are documenting from the following options:
 - **Pckt** for pocket depth
 - **Rec** for recession
 - **AttG** for attached gingiva
 - **Furc** for furcation
 - **Mobl** for mobility
 - **Bled** for bleeding
 - **Supr** for suppuration

- **plaQ** for plaque
- **Calc** for calculus

- 4 Enter the measurement of the pocket, attached gingiva, furcation, or mobility. The location to enter a value is displayed in a blue box. As you move from site to site on the chart, the number location moves also. If you need to change a number, click on the site that needs to be corrected, and then enter the new number.
- 5 Click the buttons on the right of the numbered keypad to indicate bleeding, suppuration, calculus, or plaque. These entries appear as icons in the light blue window next to the measurement.

In data entry mode, all measurements on sites and teeth are visible simultaneously.



Note

Once an entry of any type is made on the **Soft tissue** tab, a corresponding entry is made in **Progress Notes** entitled **Perio Exam**.

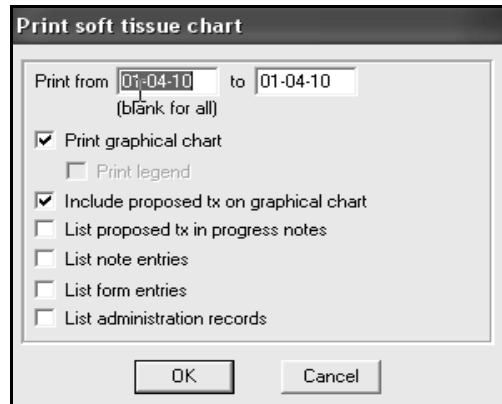
Note

If you select **Pckt**, **Rec**, **AttG**, **Furc**, **Mobl**, or **Bled**, you stay in that mode until you change to something else.

Printing the Soft Tissue Chart

To print the soft tissue chart:

- 1 Click **Print**. The **Print soft tissue chart** window is displayed.



The 'Print soft tissue chart' dialog box contains the following elements:

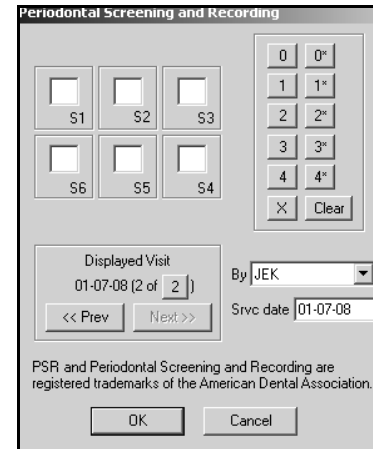
- Print from: 01-04-10 to 01-04-10 (blank for all)
- ☒ Print graphical chart
- ☐ Print legend
- ☒ Include proposed tx on graphical chart
- ☐ List proposed tx in progress notes
- ☐ List note entries
- ☐ List form entries
- ☐ List administration records
- Buttons: OK, Cancel

- 2 Enter the date range for the items you want to print.
- 3 Select the components you want to print and click **OK**.

Recording PSR Scores

The Periodontal Screening and Recording (PSR) feature categorizes the teeth by sextant. To record PSR information:

- 1 Click **PSR**. The **Periodontal Screening and Recording** window is displayed.



The 'Periodontal Screening and Recording' window contains the following elements:

- Sextant boxes: S1, S2, S3, S6, S5, S4
- Keypad: 0, 0*, 1, 1*, 2, 2*, 3, 3*, 4, 4*, X, Clear
- Displayed Visit: 01-07-08 (2 of 2)
- By: JEK
- Src date: 01-07-08
- Buttons: << Prev, Next >>
- Footer: PSR and Periodontal Screening and Recording are registered trademarks of the American Dental Association.
- Buttons: OK, Cancel

Numbers with an asterisk indicate an abnormality in the sextant. An **X** indicates an endentulous sextant.

- 2 To enter the patient's data into the fields, place your cursor in a box, and click the keypad numbers on the right, or use the keyboard.
- 3 If the patient has multiple visits, use <<**Prev**>> and <<**Next**>> to scroll through them and compare changes.

Sharing Entries among Tabs

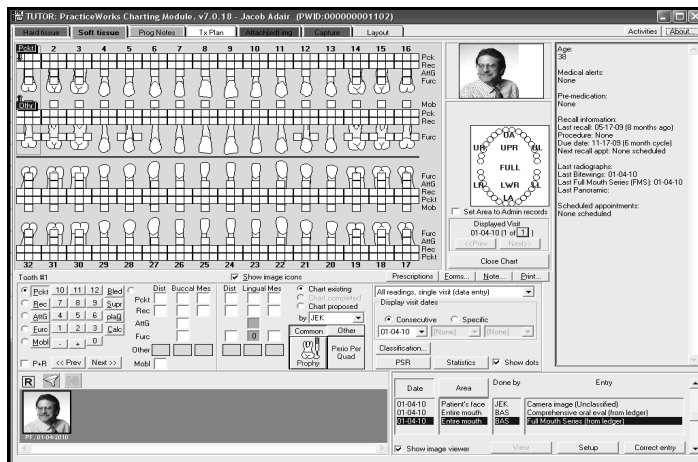
The **Soft tissue** tab interacts with other tabs:

- The patient's portrait, captured elsewhere in the system, is displayed on the **Soft tissue** tab.
- Perio entries made to the chart are recorded in the progress notes.
- Certain procedures charted on the **Hard tissue** tab result in the creation of a **Soft tissue** tab visit. These procedures include crowns, extractions, implants, and bridges.

Viewing Statistics

To see a summary of a patient's periodontal exam for a particular visit:

- 1 Click the **Statistics** button in the lower-right portion of the window. The **Full Perio Exam Statistics** window is displayed.



- 2 Select the date of a particular visit by clicking on the **Stats for visit on** drop-down list at the top of the window.

Skill Sharpeners—Using the Soft Tissue Tab

Exercise 1—Chart a periodontal condition.

To chart Jacob Adair's perio condition:

- 1 Open Mr. Adair's chart and select **JEK** from the **Producer** drop-down list.
- 2 Click the **Soft tissue** tab and select the tooth area to chart. A rectangle with pointers appears around the site.
- 3 In the measurement area, select **Pckt** for pocket depth
- 4 Enter measurements in the blue boxes. As you move from site to site on the chart, the number location moves also. If you need to change a number, click on the site that needs to be corrected, and then enter a new number.
- 5 Click the buttons on the right of the numbered keypad to indicate other conditions, such as bleeding, suppuration, calculus, or plaque.

Exercise 2—Displaying Summary Statistics

Display summary statistics for Jacob Adair's periodontal condition as of his visit on July 28, 2010.

To display summary statistics for a periodontal visit:

- 1 Open Mr. Adair's chart and click the **Soft tissue** tab. The **Soft Tissue Chart** window is displayed.
- 2 Go to the **Display Visit** area, and navigate to the 7-28-09 visit.
- 3 Double-click tooth #3. The progress notes for tooth #3 are displayed.
- 4 Click the **Statistics** button below the **Display Visit** area. The **Full Perio Exam Statistics** window is displayed.

Lesson 4

Using the Progress Notes Tab

This lesson includes:

- Understanding Progress Notes on page 23
- Using the Progress Notes Window on page 24
- Attaching Progress Notes on page 25
- Correcting Entries on page 26
- Viewing Notes by Tooth or Area on page 27
- Printing Progress Notes on page 27

Understanding Progress Notes

Progress notes reflect all the entries made in Charting, including exam results, dental treatment, and treatment plans. When you highlight an image entry in the table, a thumbnail of the image is displayed in the Image Viewer.

The following information can be displayed:

- Existing conditions
- Proposed treatment
- Completed dental treatment
- Pathologies
- Missing teeth
- Attached images (camera images, digital radiographs)
- Forms
- Notes
- Soft tissue exams

- Documents
- Contacts

You can sort the list by date or area of the mouth.

The **Entry** column contains the following types of entries:

- Text entries generated automatically by graphical charting done on the **Hard tissue** tab.
- Text entries generated automatically by graphical charting done in the **Soft tissue** tab.
- A description for a **Note**. If a note is selected in the **Entry** column, the text is displayed in the viewing area at the bottom of the window.
- A description for a **Form**. If a form is selected in the **Entry** column, the details are displayed at the bottom of the window.
- ADA codes charted as complete today. These entries can be corrected by clicking **Correct entry**.
- Treatment plan entries, shown as **(proposed from tx plan)**. These entries can only be corrected on the **Tx Plan** tab.
- Entries imported from the patient ledger, shown as **(from ledger)**. These entries can be corrected only from the ledger.
- Corrections made with **Correct entry**.

Note

Because progress notes can be configured to the specific needs of an office, the list that displays might be different in your office.

Using the Progress Notes Window

Click the **Prog Notes** tab, and the **Progress Notes** window is displayed.

TUTOR: CS PracticeWorks Charting Module v9.0.0 for Ray Adkins, Tx Plan 4 Quads RP&C - 2006 (in progress)

Hard tissue | Soft tissue | **Prog Notes** | Tx Plan | Attached img | Capture | Layout | Activities | About...

| Date | Area | Done by | Entry |
|----------|----------------|---------|--|
| 10-19-13 | Tooth #3 | JEK | Dental Image (Intraoral RVG) |
| 10-19-13 | Tooth #4 | JEK | Dental Image (Intraoral RVG) |
| 02-13-14 | Tooth #18 | JEK | Porc. fused high noble crown |
| 07-29-14 | Entire mouth | JEK | PSR Exam - Converted Statistics |
| 07-29-14 | Entire mouth | JEK | Perio Exam |
| 01-05-15 | Admin records | Admin | Contacted - HIPAA Acknowledgement |
| 01-05-15 | Entire mouth | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #11 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #3 | JEK | Generic image (Unclassified) |
| 01-05-15 | Tooth #30 | JEK | Generic image (Unclassified) |
| 01-05-15 | Patient's face | JEK | Camera image (Unclassified) |
| 01-05-15 | Tooth #11 | JEK | NOTE: (w) Complaints of pain |
| 01-05-15 | Admin records | JEK | Standard Prescription: Amoxicillin 500mg Pre-Med |
| 01-05-15 | Upr left quad | JEK | Perio S/RP - 4+ Th/Quad (from ledger) |
| 01-05-15 | Entire mouth | JEK | Full Mouth Series (from ledger) |
| 01-05-15 | Entire mouth | JEK | Panoramic (from ledger) |
| 01-05-15 | Entire mouth | JEK | Bitewings - four (from ledger) |
| 01-05-15 | Tooth #8 | JEK | Sealant on I |
| 01-05-15 | Tooth #9 | JEK | Sealant on I |
| 01-05-15 | Tooth #29 | JEK | Sealant on O |
| 01-05-15 | Upr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Upr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |
| 01-05-15 | Lwr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan) |

Correct entry

Entries to include

| | | |
|---|--|--|
| <input checked="" type="checkbox"/> Contacts | <input checked="" type="checkbox"/> Notes | <input checked="" type="checkbox"/> Forms |
| <input checked="" type="checkbox"/> Clinical | <input checked="" type="checkbox"/> Docs/Attachments | <input checked="" type="checkbox"/> Images |
| <input checked="" type="checkbox"/> ePostings | <input checked="" type="checkbox"/> Rx | <input checked="" type="checkbox"/> eForms |

| | | |
|--|---|--|
| <input checked="" type="checkbox"/> Proposed | <input checked="" type="checkbox"/> Corrections | <input checked="" type="checkbox"/> eServices requests |
| <input type="checkbox"/> Date between | | and |
| Refresh | | |

Age: 32

Medical alerts: MVP

Pre-medication: Amoxicillin 500mg

Recall information:
Last recall: 09-13-13 (16 months ago)
Procedure: 01110 (Prophylaxis - Adult)
Due date: 03-13-14 (6 month cycle)
Next recall appt: None scheduled

Last radiographs:
Last Bitewings: 01-05-15
Last Full Mouth Series (FMS): 01-05-15
Last Panoramic: 01-05-15

Scheduled appointments:
Monday, 01-05-15 at 8:00a (RPLS)

DA UPR BL
UPR
FULL*
LWR LL
LA

☐ Set Area to Admin records

Displayed Visit
01-05-15 (65 of 65)

<<Prev Next>>

Post Work Close Chart

Note... Print...

Rx... Forms...

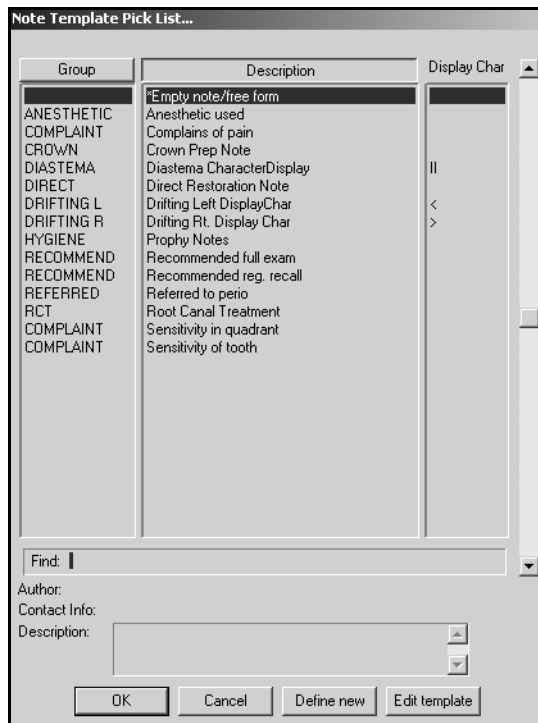
Tx Plan... Attach...

Attaching Progress Notes

Progress notes can be created on the **Hard tissue** tab, among other places. Some notes are created automatically; others are created manually.

To create a progress note manually:

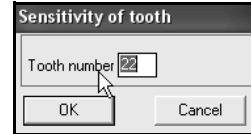
- 1 On the **Hard tissue** tab, select a tooth, an area, or the entire mouth.
- 2 Click **Note**, located above the **Progress Notes/History** section of the window. The **Note Template Pick List** is displayed.



The **Note Template Pick List** dialog box displays a table of note templates. The table has three columns: **Group**, **Description**, and **Display Char**. The **Display Char** column contains symbols like **||**, **<**, and **>**. At the bottom, there are fields for **Find:**, **Author:**, **Contact Info:**, and **Description:**, along with **OK**, **Cancel**, **Define new**, and **Edit template** buttons.

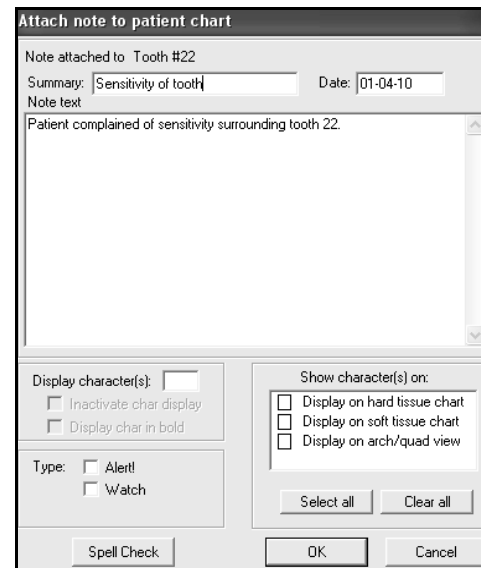
| Group | Description | Display Char |
|------------|---------------------------|--------------|
| | *Empty note/free form | |
| ANESTHETIC | Anesthetic used | |
| COMPLAINT | Complains of pain | |
| CROWN | Crown Prep Note | |
| DIASTEMA | Diastema CharacterDisplay | |
| DIRECT | Direct Restoration Note | |
| DRIFTING L | Drifting Left DisplayChar | < |
| DRIFTING R | Drifting Rt. Display Char | > |
| HYGIENE | Prophy Notes | |
| RECOMMEND | Recommended full exam | |
| RECOMMEND | Recommended reg. recall | |
| REFERRED | Referred to perio | |
| RCT | Root Canal Treatment | |
| COMPLAINT | Sensitivity in quadrant | |
| COMPLAINT | Sensitivity of tooth | |

- 3 Select the note to attach, and click **OK**. A note-specific window is displayed.



The **Sensitivity of tooth** dialog box has a **Tooth number** field with a dropdown menu showing **22**. It includes **OK** and **Cancel** buttons.

- 4 Use the options on the window to enter variable information, and then click **OK**. The **Attach note to patient chart** window is displayed.



The **Attach note to patient chart** dialog box contains the following fields and options:

- Note attached to:** Tooth #22
- Summary:** Sensitivity of tooth
- Date:** 01-04-10
- Note text:** Patient complained of sensitivity surrounding tooth 22.
- Display character(s):** ☐ Inactivate char display, ☐ Display char in bold
- Type:** ☐ Alert!, ☐ Watch
- Show character(s) on:** ☐ Display on hard tissue chart, ☐ Display on soft tissue chart, ☐ Display on arch/quad view
- Buttons: **Spell Check**, **OK**, **Cancel**, **Select all**, **Clear all**

The **Summary**, **Date**, and **Note text** fields are already filled in. You can type additional data in the **Note text** field.

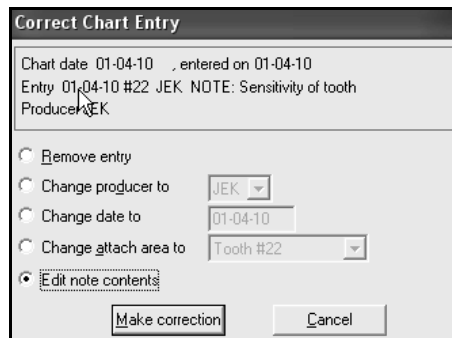
- 5 In the **Show character(s) on** area, select where the note should be displayed: **Hard tissue** tab, **Soft tissue** tab, or the **Arch/Quad** view.
- 6 Select whether the note should be an **Alert** or a **Watch**.
- 7 Click **OK**.

Correcting Entries

Use the **Correct entry** button to remove a note or to correct a chart date or producer. There is a **Correct entry** button on the **Hard tissue**, **Soft tissue**, and **Prog Notes** tab. Typically, entries are corrected from the **Hard tissue** tab.

To correct an entry:

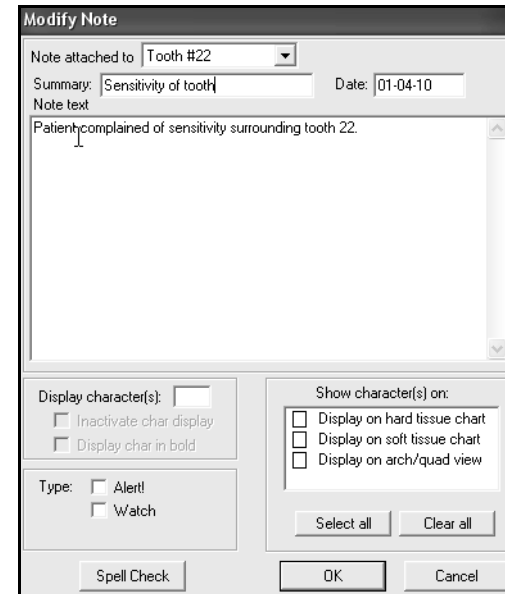
- 1 Highlight the incorrect entry, and click **Correct entry** at the bottom of the **Entry** column. The **Correct Chart Entry** window is displayed.



The **Correct Chart Entry** dialog box displays the current entry details and options for correction. The entry shown is: Chart date: 01-04-10, entered on 01-04-10; Entry: 01-04-10 #22 JEK NOTE: Sensitivity of tooth; Producer: JEK. The **Edit note contents** radio button is selected. At the bottom are **Make correction** and **Cancel** buttons.

- 2 Select the type of correction you want to make, and enter the appropriate information. Changes to the producer, the date, or the attached area are made in this window. To edit a note, select **Edit note contents**.

- 3 Click **Make correction**. The **Modify Note** window is displayed.



The **Modify Note** dialog box allows for editing the note's details. It shows the note is attached to **Tooth #22**, with a summary of **Sensitivity of tooth** and a date of **01-04-10**. The note text area contains: **Patient complained of sensitivity surrounding tooth 22.** Below the text area are checkboxes for **Display character(s)** (Inactivate char display, Display char in bold) and **Show character(s) on:** (Display on hard tissue chart, Display on soft tissue chart, Display on arch/quad view). There are also checkboxes for **Type** (Alert!, Watch) and buttons for **Spell Check**, **OK**, and **Cancel**.

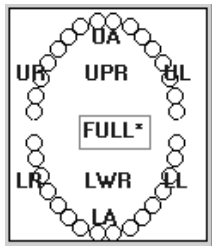
Some entries cannot be changed with **Correct entry**. When you try to correct such an entry, a message is displayed telling you where to make the correction:

- **Entries from Ledger**—Corrections must be made in the patient ledger.
- **Entries from Treatment Plan**—Corrections must be made on the **Tx Plan** tab.

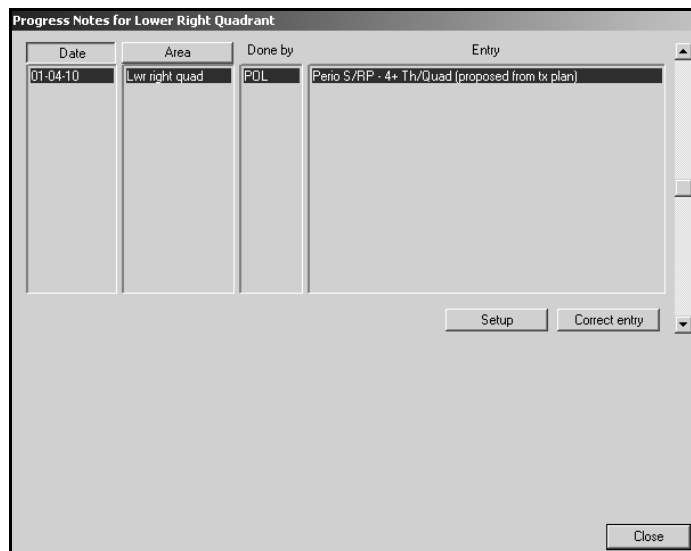
Viewing Notes by Tooth or Area

To see notes associated with a particular tooth or area of the mouth:

- 1 Use the **Arch/Quad view** section of the **Prog notes** tab, and click the tooth or area of the mouth for which you want to see the associated notes. A small rectangular box defines the area.



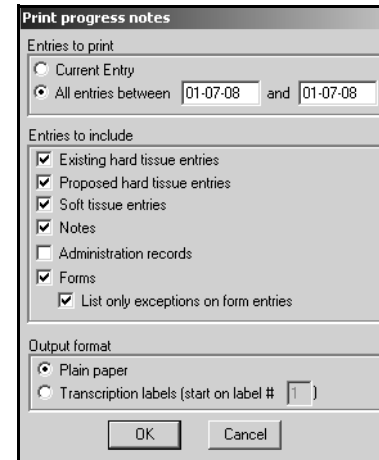
- 2 Double-click the rectangle, and the **Progress Notes for [area you selected]** window is displayed, which lists all items—notes, forms, watches, and alerts—associated with that area.



Printing Progress Notes

To print information from the **Prog Notes** tab:

- 1 Click **Print**. The **Print progress notes** window is displayed.



- 2 Select whether you are printing the entry or all entries for a specific range of dates.
- 3 In the **Entries to include** section, select the types of information to print.
- 4 In the **Output format** section, choose **Plain paper** or **Transcription labels**.
- 5 Click **OK**. The system prompts you with the option of previewing the output you selected before sending it to the printer.
- 6 Select **Preview** or **Print** and click **OK**.

Skill Sharpeners—Using the Prog Notes Tab

Exercise 1—Attach a Progress Note

You want to attach a note to indicate that you used an anesthetic on Jacob Adair during his visit today.

To create the note:

- 1 Open Mr. Adair's chart and click the **Prog Notes** tab.
- 2 Click **Note**, located above the **Progress Notes/History** section of the window. The **Note Template Pick List** is displayed.
- 3 Select **Anesthetic used**, and click **OK**. A note-specific window is displayed.
- 4 Use the options on the window to enter variable information, and then click **OK**. The **Attach note to patient chart** window is displayed.

The **Summary**, **Date**, and **Note text** fields are already filled in. You can type additional data in the **Note text** field.

- 5 Click **OK**.

Exercise 2—Display a Thumbnail Image

From the **Prog Notes** tab, display a thumbnail image of tooth #3.

To display a thumbnail image from the **Prog Notes** tab:

- 1 Click the **Prog Notes** tab. The **Progress Notes** window is displayed.
- 2 Click the column header **Area** to sort the notes by tooth number.
- 3 Click on the note relating to tooth #3. The thumbnail image is displayed in the image viewer near the bottom of the window.

Lesson 5

Using the Treatment Plan Tab

This lesson includes:

- Working with Treatment Plans on page 29
- Implementing Treatment Plans on page 30
- Using the Treatment Plan Tab on page 31
- Creating a Treatment Plan on page 32
- Presenting Tx Plans for Acceptance on page 33
- Reviewing a Treatment Plan on page 33
- Submitting Procedures for Pre-Determination on page 34
- Switching Between Tx Plans on page 34
- Copying Procedures Between Tx Plans on page 35
- Entering Appointment Information on page 36

Working with Treatment Plans

A treatment plan is a recommended series of procedures created for a patient. A patient can have more than one treatment plan, but only one can be accepted and in progress at any given time. A patient must give consent for each plan proposed.

When you exit a chart, **Does the patient wish to accept the proposed treatment in plan at this time?** is displayed. If you select **Yes**, the treatment plan status changes to **Accepted**; if you select **no**, the status remains **Proposed**.

A treatment plan is used in the following ways:

- To present the patient with a course of treatment, number of visits, fees, and insurance estimates (if applicable).
- To schedule the sequence of appointments required to complete the treatment.
- To submit to the patient's insurance company for approval, if applicable.

You can prepare multiple treatment plans for the same diagnosis to present your patient with alternatives. You can copy treatment plans and move procedures from one plan to another.

The procedures listed in a treatment plan are also listed on the appointments for which they are scheduled. Changing procedures in the appointment automatically produces the same change in the treatment plan.

Treatment plans that are not yet scheduled can be monitored with the Office Expert and the Unscheduled TxPlan Contact Expert.

Implementing Treatment Plans

To implement a treatment plan:

- 1 Use Charting to create one or more treatment plans based on the diagnosis of the patient.
- 2 Present the plans for approval. While a patient may consider alternative plans, only one can be accepted and in progress at a time.
- 3 If appropriate, print an insurance pre-determination, and then enter the results when the company responds.
- 4 Define the appointments needed to complete the plan. Group procedures into appointments, called *visits*, and define the details of each visit.
- 5 Schedule the procedures.

Note

As procedures are completed, they are marked complete in the treatment plan.

Using the Treatment Plan Tab

Click the **Tx Plan** tab, and the **Treatment Plan** window is displayed.

TUTOR: CS PracticeWorks Charting Module v9.0.0 for Ray Adkins, Tx Plan 4 Quads RP&C - 2006 (in progress)

Hard tissue Soft tissue Prog Notes **Tx Plan** Attach(ed) img Capture Layout Activities About...

Description of plan: 4 Quads RP&C - 2006

Fee expiration date: 02-04-15

Primary insurance: Insured party: Ray Adkins Secondary insurance: Insured party: Employer/Plan: ABC Inc. Employer/Plan: Insurance co.: Metropolitan Insurance Insurance co.:

Submit ins Pre-D...
Print patient proposal...
Sequence Visits...
Re-sort Visit #
Tx contacts...
MedVisor...

| Visit # | Prod | Description | Fee | Status |
|---------|------|------------------------------------|--------|--|
| 1 | POL | 04341 UL (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Sched for 01-05-15 at |
| 2 | POL | 04341 LL (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending I |
| 3 | POL | 04341 UR (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending I |
| 3 | POL | 04341 LR (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending I |

☒ Show completed entries

| | | | | | | |
|----------------------|----------|---------------------|----------------|--------------|--------------------|-----------------|
| Fee for remaining Tx | \$780.00 | Update ins estimate | Add/Edit | Copy from... | Request Pre-D | Select new plan |
| Office write off | \$0.00 | | | | | |
| Estimated insurance | \$0.00 | Pri details... | Sec details... | Cancel entry | Ins co approved... | Entry performed |
| Patient's portion | \$780.00 | | | | | |

Taskbar: start | Internet Explorer | NewCh... | N... | X... | Outlook... | AT&T Gl... | RoboHe... | Untitled... | Skype... | Skype f... | Jasc Pai... | CS Prac... | DE255_...

Creating a Treatment Plan

Note

Typically, a Tx plan is started from the **Hard tissue** tab. In proposed mode, chart the treatment that needs to be completed, and then go to the **Tx Plan** tab to set up the plan.

Note

The colors can be configured.

To create a treatment plan:

- 1 Click the **Hard tissue** tab. The **Hard tissue chart** window is displayed.
- 2 In the **Chart Mode** section of the window, click **Chart proposed**. While you are in **Chart Proposed** mode, entries made to the hard tissue chart appear in red, and they are automatically added to the treatment plan.
- 3 Select a tooth, and use the chart buttons to chart proposed procedures to the patient's hard tissues. Repeat for additional teeth to be treated. Depending on the procedures selected, additional choices may be displayed. For example, if you indicate the necessity of a crown, you will be prompted to select the material for the crown.
- 4 Click the **Tx Plan** tab. The **Select treatment plan to view/display in chart** window is displayed.

| Description | Created | Expired | Status with Patient |
|---------------------|----------|----------|---------------------|
| 4 Quads RP&C - 2006 | 01-07-08 | 02-06-08 | In progress |

Buttons: Select plan, Create new plan, Edit plan, Remove plan, Cancel, Accept plan, Complete plan

- 5 Click **Create new plan**. The **Treatment Plan** window is displayed.

Buttons: Submit into Pre D, Print patient proposal, Sequence Visits, Re-sort Visit #, Tx contacts, Med/Note

| Visit # | Prod | Description | Fee | Status |
|---------|------|-----------------------------------|--------|---|
| 1 | POL | 04341 UL (Pemo S/RP - 4+ Th/Quad) | 195.00 | Pre auth \$156.00 Scheduled for 01-05-15 at |
| 2 | POL | 04341 LL (Pemo S/RP - 4+ Th/Quad) | 195.00 | Pre auth \$156.00 Appointment pending |
| 3 | POL | 04341 UR (Pemo S/RP - 4+ Th/Quad) | 195.00 | Pre auth \$156.00 Appointment pending |
| 4 | POL | 04341 LR (Pemo S/RP - 4+ Th/Quad) | 195.00 | Pre auth \$156.00 Appointment pending |

Buttons: Show completed entries, Fee for remaining Tx \$700.00, Office visit of \$0.00, Estimated insurance \$0.00, Patient's portion \$700.00, Update into estimate, Add/Edit, Copy Item, Request Pre D, Select new plan, Print, Print Patient, Cancel entry, No co approved, Entry performed

- 6 Enter a treatment plan name in the **Description of plan** field. The fee expiration date defaults to 30 days from the current date and can be edited.
- 7 Click the **Sequence Visits** button in the upper-right of the window. Select the visit number, then select each procedure for that visit. Sequence the procedures until you have a logical number of visits for the completion of this treatment plan.
- 8 To change the producer for one or more of the procedures, click on the initials by the procedure in the **Prod** column until the correct producer's initials are displayed.

The **Status** column displays the following:

- Not yet printed
- Proposal printed on <date>
- Waiting to submit Pre D
- Pre Auth \$XXXX on <date>
- Performed ADA <code> on <date>

Look at the status when working with a treatment plan. The Tx plan **Status** column changes as you make selections and choices. Hard tissue chart entries display treatment details that appear in the **Status** column.

Presenting Tx Plans for Acceptance

Before you can schedule appointments for a treatment plan, the patient must accept the plan.

You can print the treatment plan for the patient, or you can show the plan on your computer screen. You can present several treatment plans, and let the patient choose. While there can be several plans for one patient, only one plan can be accepted.

There are four ways to indicate that the patient accepts a plan:

- When you create the treatment plan from Charting and close the chart, you are prompted for whether the patient accepts the plan.
- From the **Treatment Plan Pick List**, select the plan and click **Accept**.
- When you make a new appointment, or double-click an existing appointment, for a patient with an unaccepted treatment plan, the **Treatment Plan Pick List** prompts you to indicate that the plan has been accepted.
- Treatment plans that are auto-created during the scheduling of an appointment are, by definition, accepted.

Reviewing a Treatment Plan

To review another treatment plan for a patient:

- 1 In the patient's chart, click the **Tx Plan** tab. The **Treatment Plan** window is displayed.
- 2 Click **Select new plan**. The **Select treatment plan to view/display in chart window** is displayed.

| Description | Created | Expired | Status with Patient |
|---------------------|----------|----------|---------------------|
| 4 Quads RP&C - 2006 | 01-07-08 | 02-06-08 | In progress |

Buttons: Select plan, Create new plan, Edit plan, Remove plan, Cancel, Accept plan, Complete plan

The **Status with Patient** displays one of the following:

- **Proposed**
 - **Accepted**
 - **In progress**
 - **Completed**
- 3 Click **Select plan**.

Submitting Procedures for Pre-Determination

If the patient's insurance company requires pre-determination for any procedures in the treatment plan, you can submit the plan for approval before scheduling the procedures.

To submit the treatment plan for pre-determination:

- 1 Click the **TxPlan** tab. The **Tx Plan** window is displayed.
- 2 Highlight the procedure you want to submit, and click **Request Pre-D**.
- 3 Repeat for each procedure you want to submit.
- 4 Click **Submit ins Pre-D**. The **Submit for Predetermination** window is displayed.

Submit for Predetermination

Primary Predetermination:

☒ Submit primary

☐ Print form on paper now

☒ Submit electronically now

☐ Add an Electronic Attachment now

Secondary Predetermination:

☐ Submit secondary

☒ When the primary approval is entered

☐ Print form on paper now

☐ Submit electronically now

☐ Add an Electronic Attachment now

OK Cancel

- 5 Select **Print form on paper now** if you want to fax or mail the request; select **Submit electronically now** if your office has this capability. The Insurance Submittal Information form is displayed.

- 6 Read the information on the form to make certain it is correct. Enter additional information as necessary.
- 7 Select the options you want, and click **OK**.

Switching Between Tx Plans

If you have more than one treatment plan or want to create another treatment plan, you can switch between plans from the **TxPlan** tab.

To select a different treatment plan:

- 1 On the **TxPlan** tab, click **Select New Plan**. The **Select treatment plan to view/display in chart** window is displayed.

Select treatment plan to view/display in chart

| Description | Created | Expired | Status with Patient |
|---------------------|----------|----------|---------------------|
| 4 Quads RP&C - 2006 | 01-07-08 | 02-06-08 | In progress |

Select plan Create new plan Edit plan Remove plan

Cancel Accept plan Complete plan

- 2 Select a different plan by double-clicking it, or by highlighting it and clicking **Select Plan**. The plan is now displayed on the **TxPlan** tab and on the **Hard tissue** tab.

Copying Procedures Between Tx Plans

Although you can create multiple treatment plans for a patient, only one can be accepted at a time. To create a new or revised treatment plan, you can copy procedures of another treatment plan and then revise visits in the new treatment plan.

To copy procedures from one treatment plan to another:

- 1 Open or create the treatment plan into which you want to copy a procedure.
- 2 Click **Copy From**. The **Select treatment plan to view/display in chart** window is displayed.

| Description | Created | Expired | Status with Patient |
|---------------------------|----------|----------|---------------------|
| option 1 implant #30 | 01-04-10 | 02-03-10 | Proposed |
| option 2 Bridge #29-30-31 | 01-04-10 | 02-03-10 | Proposed |
| Comprehensive plan | 01-04-10 | 02-03-10 | Proposed |

Select plan Create new plan Edit plan Remove plan

Cancel Accept plan Complete plan

- 3 Highlight the treatment plan containing the procedure you want to copy, and click **Select**. The **Copy Procedures from Tx Plan** window is displayed. It lists the procedures in the plan.

| Line | Code | Description | Price | Status |
|------|------|------------------------------------|--------|---------------------------------------|
| 1 | POL | 04341 UL (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Sched for 01-04-10 a |
| 2 | POL | 04341 LL (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending |
| 3 | POL | 04341 UR (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending |
| 3 | POL | 04341 LR (Perio S/RP - 4+ Th/Quad) | 195.00 | Pre auth\$156.00,Appointment pending |

☒ Keep same visit number
☐ First visit from this plan should become visit

Copy selected Move selected Select all Clear all Cancel

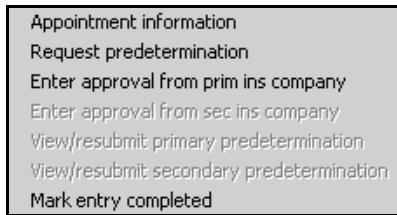
- 4 Highlight one or more procedures in the list that you want to copy.
- 5 To change the visit numbers, select **First visit from this plan should become visit**, and type a visit number.
- 6 Click **Copy selected** to copy the procedures, or **Move selected** to move the procedures. You are returned to the treatment plan that contains the copied procedures.

Entering Appointment Information

You can enter details about the procedures in the treatment plan from Charting. This streamlines the process of scheduling by defining the pertinent elements of an appointment, such as treatment class, producer, time units necessary, and whether lab work is required.

To enter appointment information from Charting:

- 1 Click the **TxPlan** tab.
- 2 Right-click on a procedure for which you want to add appointment information. A short-cut menu is displayed.



- 3 Select **Appointment information**. The **Appointment Information** window is displayed.

A screenshot of the 'Appointment Information' window. It contains several sections: Patient information (Adkins, Ray, 1010 Demo Street, Atlanta, GA 30339), Appointment information (Description: RPLS, Tx class: Periodontal), Production information (Producer: POL, Est. production \$: 195.00), and Lab information (Lab Case, Lab case pending). There are also buttons for OK, Find, Cancel, Confirm, Check in, Check out, Resched/Cancel, Appt hsty, and Recall appt.

- 4 Click the **Description** button to select the type of appointment. The appropriate abbreviation is displayed along with the corresponding treatment class.
- 5 To select a different producer for this appointment, select from the drop-down list.
- 6 Click the arrows to enter the number of **Minutes** or **Units** of **Production** and **Non-production** time required for this appointment. Either minutes or units may be used.
- 7 Click **Ins Est** to view the **Insurance Estimate** calculated by the system based on the patient's insurance plan. If the patient does not have insurance, this button is inactive.
- 8 Click **Add/Edit Entry** to edit the procedures in the list.
- 9 To remove a procedure from the list, select the procedure and click **Remove Entry**. A **Do you want to defer this procedure to a later date?** message is displayed. If you select **No**, the procedure is removed permanently from the treatment plan.
- 10 If you made any adjustments to the appointment information, be sure to click **Re-calculate** to see the revised total cost of the appointment. The system enters that amount into the **Est. production \$** field.
- 11 If lab work is required to be returned for the appointment, check **Lab Case** and **Lab Case Pending** under **Lab Information**. Use the **Select Lab** button to indicate which lab is used for this work.
- 12 Click **OK**. The appointment is saved, but not scheduled. Scheduling occurs in the practice management module.

Skill Sharpener—Using the Tx Plan Tab

Exercise 1—Create a treatment plan for Jacob Adair.

You have examined Jacob Adair and now you want to create a treatment plan.

To create the plan:

- 1 Open Mr. Adair's chart and click the **Hard tissue** tab.
- 2 In the **Chart Mode** section of the window, click **Chart proposed**.
- 3 Select a tooth, and use the chart buttons to chart proposed procedures to the patient's hard tissues.
- 4 Click the **Tx Plan** tab. The **Select treatment plan to view/display in chart** window is displayed.
- 5 Click **Create new plan**. The **Treatment Plan** window is displayed.
- 6 Enter a name in the **Description of plan** field.
- 7 Click the **Sequence Visits** button in the upper-right of the window. Select the visit number, then select each procedure for that visit.

Lesson 6

Using the Attached Images Tab

This lesson includes:

- Understanding the Attached Images Tab on page 39
- Using the Attach(ed) img Tab on page 40
- Attaching Images on page 41
- Importing X-rays on page 41
- Removing Images From a Chart on page 41
- Emailing Images on page 42

Understanding the Attached Images Tab

Use the **Attach(ed) img** tab to attach images to the patient's chart, or to view existing attached images. You can also move an image attached to one tooth or area and attach it to another tooth or area.

In the **Hard tissues** tab, a camera icon lets you know that the actual image resides on the **Attach(ed) img** tab. If you want to view a full-sized image, double-click the image in the viewer to launch the CS Imaging software or the **Image Editor** window. You can also make comments on the image.

An image can be any of the following:

- An image from a video source—typically an intraoral camera—captured on the **Capture** tab
- An x-ray imported directly from one of several digital x-ray systems integrated with the PracticeWorks software
- An image that was imported from another location
- Document images acquired with a TWAIN device—typically a scanner or digital still camera

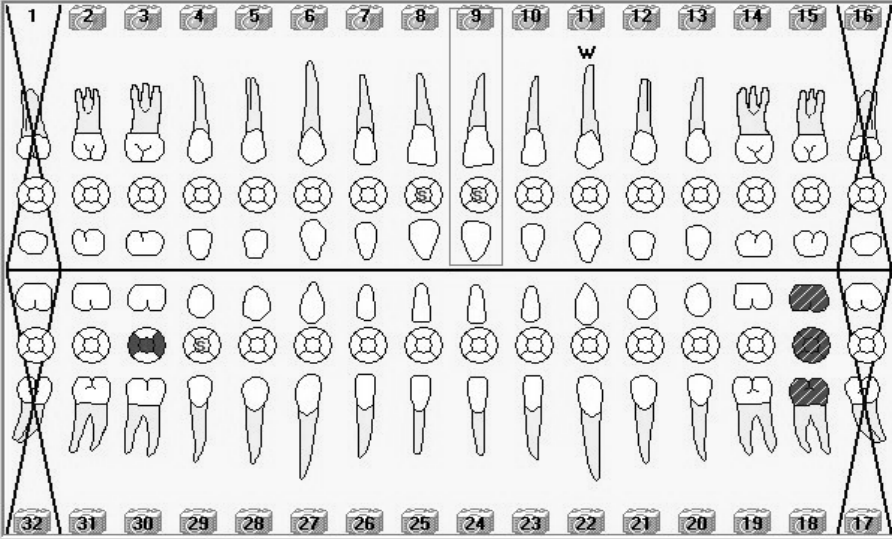
Using the Attach(ed) img Tab

Click the **Attach(ed) img** tab, and the **Attach Images** window is displayed.

TUTOR: CS PracticeWorks Charting Module v9.0.0 for Ray Adkins, Tx Plan 4 Quads RP&C - 2006 (in progress)

Hard tissue | Soft tissue | Prog Notes | Tx Plan | **Attach(ed) img** | Capture | Layout

Activities | About...



Age: 32

Medical alerts: MVP

Pre-medication: Amoxicillin 500mg

Recall information:
Last recall: 09-13-13 (16 months ago)
Procedure: 01110 (Prophylaxis - Adult)
Due date: 03-13-14 (6 month cycle)
Next recall appt: None scheduled

Last radiographs:
Last Bitewings: 01-05-15
Last Full Mouth Series (FMS): 01-05-15
Last Panoramic: 01-05-15

Scheduled appointments:
Monday, 01-05-15 at 8:00a (RPLS)

Set Area to Admin records

Documents

Unattach

R Tooth #9

Image Not Accessible From This Location

#9, 10-09-2013

Image Not Accessible From This Location

#11, 07-01-2013

Image Not Accessible From This Location

#25, 07-01-2013

Image Not Accessible From This Location

#9, 07-01-2013

Image Not Accessible From This Location

#10, 01-16-2013

Image Not Accessible From This Location

#9, 11-11-2011

Image Not Accessible From This Location

#9, 04-04-2004

Image Not Accessible From This Location

#9, 01-24-2003

☒ Show All Image Types

☒ Include Remote Images

☒ Intraoral ☒ Extraoral ☒ Other ☒ Context

☒ RVG ☒ Pan ☒ FMS ☒ Ceph ☒ Other

Clear Filter

☐ Date between and Refresh

| Date | Area | Done by | Entry |
|----------|----------------|---------|--|
| 01-05-15 | Upr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan |
| 01-05-15 | Lwr left quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan |
| 01-05-15 | Upr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan |
| 01-05-15 | Lwr right quad | POL | Perio S/RP - 4+ Th/Quad (proposed from tx plan |

View Setup Correct entry

start | NewCh... | Outloo... | AT&T Gl... | RoboHe... | Untitled... | Skype... | Skype f... | Jasc Pai... | CS Prac... | DE255...

Attaching Images

To attach images to the patient's chart:

- 1 Acquire new images. The images in the viewer displayed on the **Capture** tab.
- 2 Click the **Attach(ed) img** tab.
- 3 Make sure the **Show All Image Types** option is selected.
- 4 Make sure the **Unattach** button is highlighted. Images not attached are displayed in the **Image Viewer** at the bottom of the tab.
- 5 Drag and drop an image on a tooth, mouth area, portrait area, or document area to attach it to that area. On the tooth chart, a small camera icon is displayed near the tooth or an asterisk is displayed in the mouth area to show that one or more images are attached. The portrait area is large enough to display the image, so no icon is needed.
- 6 Continue to attach images as needed. There is no limit to the number of images you can attach to any area; the portrait area, however, shows only the most recently attached image.
- 7 To see more images in the **Image Viewer** area, use the scroll bar.

When you attach an image, the type of image, the tooth # or area name, and the date it was attached are displayed as a caption under the image.

An entry is made in the **Prog Notes** tab for each attached image. The note indicates whether it is a **Generic Image**, **X-ray**, or **Camera Image**.

Importing X-rays

Images acquired with the CS Imaging software are automatically imported and attached, depending on how they were attached in the imaging software.

Click **Import X-rays** to import x-rays from compatible programs. When the image is imported, it is attached and displayed in the **Image Viewer**.

You can also use the Microsoft Windows **Copy** and **Paste** functions to import x-rays from other programs.

Removing Images From a Chart

To remove an image from a chart:

- 1 Click the **Prog Notes** tab.
- 2 Select the appropriate entry, and click **Correct Entry**.
- 3 Select **Remove Entry** and click **Make Correction**. Images deleted here are not displayed when you access the other tabs.

Note

A security level of 10 is required to delete images.

Emailing Images

To create an email message with attached images from Charting:

Note

If you are emailing an image captured in CS Imaging software, the email also includes a link for the recipient to download the image viewer.

- 1 Select the image you want to attach to the email by right-clicking on it in the **Image Viewer**. A short-cut menu is displayed.
- 2 Select **Send Image via E-mail**. An email message is displayed with the images represented as file attachments. The following information is included automatically in the body of the message:
 - Practitioner's name
 - Patient's name
 - File name
 - Image date
- 3 Type the email address of the recipient and the text you want to include in the body of the message, and click **Send**.

Skill Sharpener—Using the Attach(ed) Images Tab

Exercise 1—Attach and email images.

You want to attach images to a patient's chart and email the images.

To attach and email images of Jacob Adair:

- 1 Open Mr. Adair's chart and click the **Attach(ed) img** tab.
- 2 Select the **Show All Image Types** option.
- 3 Make sure the **Unattach** button is highlighted. Images not attached are displayed in the **Image Viewer** at the bottom of the tab.
- 4 Drag and drop an image to attach it to an area. To see more images in the **Image Viewer** area, use the scroll bar.
- 5 Right-click the image in the **Image Viewer**. A short-cut menu is displayed.
- 6 Select **Send Image via E-mail**. An email message is displayed with the images represented as file attachments.
- 7 Check the following information in the body of the message:
 - Practitioner's name
 - Patient's name
 - File name
 - Image date
- 8 Type the email address of the recipient and the text you want to include in the body of the message.
- 9 Click **Send**.

Note

If you are emailing an image captured in CS Imaging software, the email also includes a link for the recipient to download the image viewer.

Lesson 7

Using the Capture Tab

This lesson includes:

- Understanding the Capture Tab on page 45
- Using the Capture Tab on page 46
- Capturing Intraoral Images on page 47
- Capturing Images from TWAIN Devices on page 47
- Importing Images from Digital Cameras on page 48

Understanding the Capture Tab

The **Capture** tab enables you to capture images from external devices and place them in a patient's chart. These images can come from x-rays, extraoral and intraoral cameras, digital cameras, and scanners. Using the **Capture** tab and the **Attached Images** tab together, you can capture images and attach those images to specific teeth or areas of the mouth.

Use the **Capture** tab to capture images from most Audio Video Interleave (AVI) compatible video sources. AVI is a standard used by many video devices, capture cards, some stand-alone video cameras, and so forth. Of course, your video capture card must be compatible with PracticeWorks.

Use the **External application** button to launch any of the other programs which are integrated with PracticeWorks.

When you click the **Capture** tab, the system asks if you want to begin capturing now.

- Click **Yes** if you want to go immediately into capture mode.
- Click **No** if you want to open the tab, but not capture images right now. On the tab, you can switch to capture mode at any time by clicking **Capture**.

Note

Refer to the hardware requirements or contact PracticeWorks Support for information about the video capture cards that integrate with PracticeWorks.

Using the Capture Tab

Click the **Capture** tab, and the following window is displayed.



Capturing Intraoral Images

To acquire images from your intraoral camera, connect the camera to your computer as instructed by the camera's manufacturer and follow these steps:

- 1 Start capture mode by clicking **Yes** when the **Start capturing now?** message is displayed, OR click the **Capture** button at the bottom of the **Capture Tab** window. The cursor changes to a cross, and the message **Press Esc to stop** indicates you are in capture mode.
- 2 When a image from your camera is displayed that you want to capture, click the mouse button. The image is displayed on the **Capture Tab** window.
- 3 If you are dissatisfied with the image you captured, right-click on the image to discard it. You are returned to the live view, and you can resume capturing.
- 4 To save an image, click the mouse button again. The image is displayed as a thumbnail on the **Image Viewer**.

Capturing Images from TWAIN Devices

TWAIN refers to a programming standard for acquiring images from such devices as scanners, digital still cameras, and so forth.

To acquire images from TWAIN devices:

- 1 On the **Capture** tab, click **External application**. A window is displayed giving you these choices:
 - Twain Quick Scan
 - Twain Advanced Scan

If you have more than one TWAIN device installed, a list is displayed.

- 2 Select a device from the options listed.
- 3 Repeat the steps as required. The most recently captured image appears in the upper-left corner of the **Image Viewer**. To view all images, scroll down.
- 4 When you have finished capturing images, press **E**. The **Attached Images** tab opens. You can attach the captured images to the patient's chart.

You can return to the **Capture** tab at any time to add more images. Images that were saved as thumbnails are retained.

Note

All capture devices have to be configured in PracticeWorks.

Tip

When saving an image, click slowly. If the video does not return to a live image after a few seconds, your second click was too fast. Click again once to save the image.

Importing Images from Digital Cameras

The **Capture** tab enables you to import images directly from your digital camera into the patient's chart. Before you can do this, you must configure the import option in the **Configuration** window.

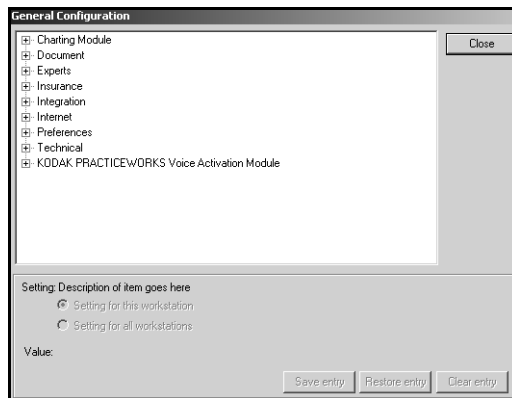
Note

The import directory for digital camera must be configured for each workstation.

Configuring the Import Directory

To configure the software to import images from a digital camera:

- 1 Click **Start > All Programs > PracticeWorks > Configuration of PracticeWorks**. The **Configuration of PracticeWorks** window is displayed.
- 2 Click **Setup > General Configuration**. The **General Configuration** window is displayed.



- 3 Click the plus sign next to **Integration**, and a submenu is displayed.
- 4 Click the plus sign next to **Digital Camera**, and then select **Import Directory**. **Settings for this workstation** is selected by default.
- 5 Click **Browse**, and navigate to the directory associated with your digital camera's card reader.

Note

To import images from a digital camera, the camera must be connected via a USB port and turned on before importing.

Note

See your camera manufacturer's documentation about connecting your camera to your computer.

- 6 Select the appropriate directory, and click **Open**.
- 7 Click **Save Entry**.
- 8 In the **Digital Camera** list, select **Delete Images from Camera after Importing**.
- 9 In the **Value** field, use the drop-down list to select **No** or **Yes**. Selecting **Yes** erases the images from your camera; **No** does not. Click **Save Entry**.
- 10 Click **Close**.
- 11 Select **File > Exit** to close the **Configuration** window.

Importing Images

To import images from a digital camera:

- 1 Click the **Capture** tab. The **Capture Tab** window is displayed.
- 2 Click **Digital Camera**. The **Digital Camera Import** window is displayed.
- 3 To select a different import directory, click **Browse**.
- 4 Click the images you want to import. Images are highlighted by a green border.
- 5 Click **Import Images**. The images are imported and displayed in the **Image Viewer**.

After you have imported the images into a patient's chart, you can associate them with a tooth or area of the mouth by right-clicking the image and selecting **Edit image information**.

Skill Sharpener—Using the Capture Tab

Exercise 1—Preview an Image

Preview the image of Ray Adkins's tooth #30 on the **Capture** tab. After you have previewed the image, close it. Then open and close the image again.

To preview an image:

- 1 Click the **Capture** tab. The **Capture** window is displayed.
- 2 In the **Image Viewer** section of the window, find the thumbnail for tooth #30, and click it. The thumbnail is outlined in red.
- 3 Right-click on the thumbnail. The menu is displayed.
- 4 Select **Preview**. A larger version of the image is displayed.
- 5 To close the **Preview** window, click the **X**.

To open the image, and then close it:

- 1 Double-click on the thumbnail in the **Image Viewer**. The **Image Editor** window is displayed.
- 2 To close the **Image Editor** window, click the **X**.

Lesson 8

Using the Layout Tab

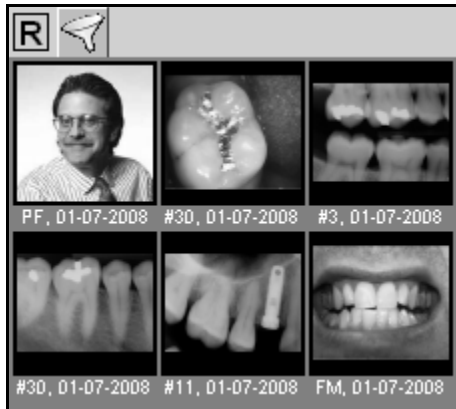
This lesson includes:

- Understanding the Layout Tab on page 51
- Adding Images to the Preview Window on page 53
- Deleting Images on page 54
- Printing an Image Layout on page 54
- Annotating Images on page 54

Understanding the Layout Tab

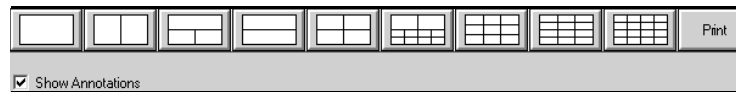
Use the **Layout** tab to organize, view, and print different images together. You can also integrate x-rays and intraoral images into a single case presentation.

When you click the **Layout** tab, existing images are displayed in the **Image Viewer** on the right side of the window.

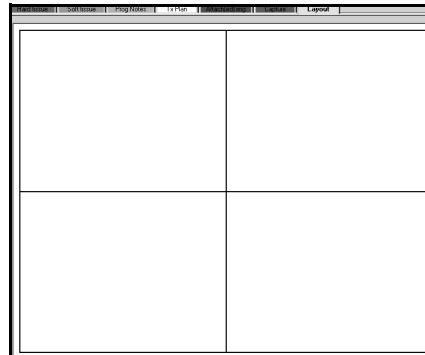


An active scroll bar indicates that there are more images than can be displayed at one time. Additional images can be viewed by scrolling.

Most of the **Layout** tab is a large blank window called the **Preview** window. Below the **Preview** window are buttons representing the various layouts available to you. A *layout* is the way one or more images can be arranged and displayed.



Click a layout button, and that layout is displayed in the **Preview** window. Each section of the layout is referred to as a *pane*.



To change a layout, click a different layout button.

Layout Tab

Click the **Layout** tab, and the following window is displayed.



Adding Images to the Preview Window

The **Image Viewer** enables you to preview, access, and annotate any of the images associated with a patient. The **Image Viewer** is available on the **Hard tissue**, **Soft tissue**, **Capture**, and **Layout** tabs of Charting.

After you select a layout, drag images one at a time from the **Image Viewer** to the appropriate pane of the layout on the **Preview** window. Each pane can contain a single image. An image may be dragged from one pane in the layout to another pane. The layout may contain any mix of images, regardless of source.

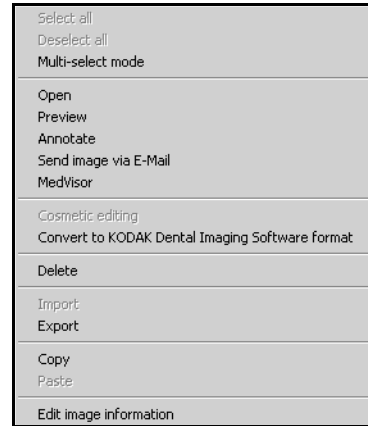
If you add a single wrong image to the layout, right-click the pane with the wrong image, and select **Clear**. Or you can right-click and select **Clear All**, and the layout and all the images you added are cleared.

Keep the following points in mind when designing your layout:

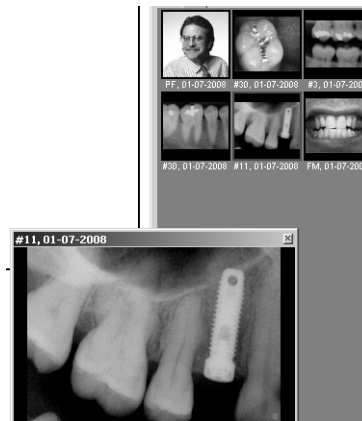
- Replace an image by dropping a different image over the existing image.
- If you do not want annotations to display, deselect the **Annotations** option beneath the layout buttons.
- To add or edit annotations, double-click on a thumbnail image, and the **Image Annotations** window is displayed.

You can start with one layout and change to another. For example, if you select a layout with four image panes, you can place four images there. If you switch to a layout with two image panes, only the top two images will display. If you then switch back to a four image layout, the software remembers the original four images and places them correctly.

To preview an image before dragging it to the layout, right-click on the image in the **Image Viewer**. A short-cut menu is displayed.



Select **Preview**, and a larger version of the image is displayed.



To close an image that you are previewing, click the **X** in the upper-right corner of the preview.

Note

You can drag more than one image at a time to the Image Viewer as long as multi-select mode is enabled. To enable, right-click on any image in the Image Viewer and click **Multi-select mode**.

Note

Deleting an image requires level 10 security.

Deleting Images

To delete an image:

- 1 Right-click the thumbnail of the image you want to delete. A menu is displayed.
- 2 Select **Delete**. The **Delete Image Verification** window is displayed.
- 3 Click **Yes** to delete.

If your office uses CS Imaging software, deleting an image from Charting also deletes it from the imaging software.

Printing an Image Layout

To print an image layout, click **Print** on the **Layout** tab.

When you print your layout, the patient's name, date, and time of printing is printed automatically in the lower-left corner of the page.

Annotating Images

If your office uses CS Imaging software and you select **Annotate**, the image opens in the **CS Imaging Annotation** window.

Annotations can take the following forms: text, shapes, or measurements.

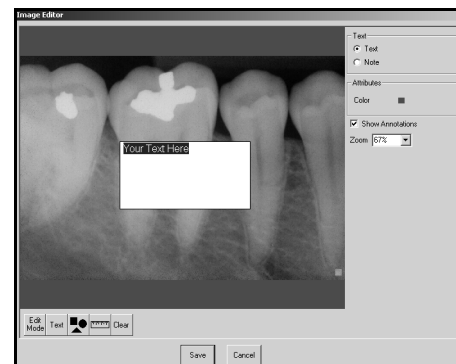
Adding Text to an Image

To add text to an image:

- 1 Right-click on the thumbnail of the image you want to annotate. A menu is displayed.
- 2 Select **Annotate**. The **Image Editor** window is displayed.



- 3 Click **Text**.
- 4 Click and drag the cursor to draw a text box on the image. A window opens in which you can type text.



- 5 Type the text in the box.

- Click **Save**.



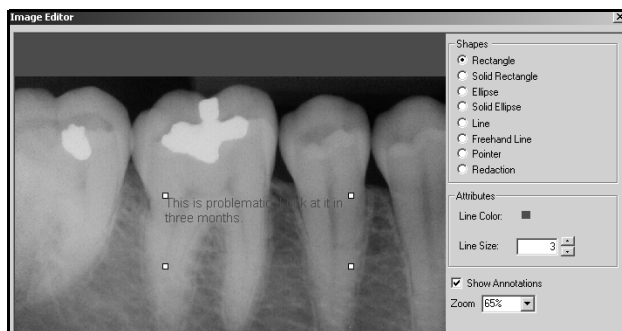
Adding a Shape to an Image

To add a shape to an image:

- Click the **Shapes** button.

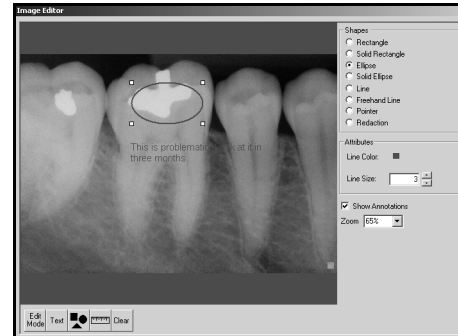


The **Image Editor** window is displayed again with a list of shapes from which to choose on the right side of the window.



- Select the shape you want to use.
- In the attributes section of the window, select the **Line Color** and **Line Size** that you want.

- Click and drag the cursor to draw the shape you selected.



- Click **Save**.

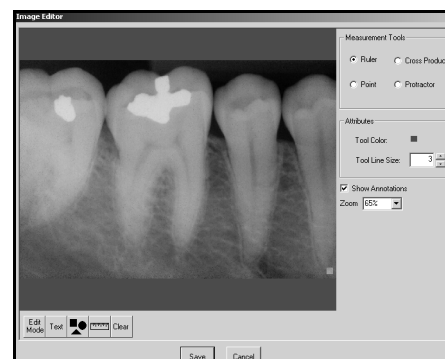
Adding Measurements to an Image

To add a measurement to an image:

- Click the **Ruler** button.



The **Image Editor** window is displayed again with a list of **Measurement Tools** displayed on the right side of the window.



- Select the tool you want to use.

Note

User must be in Text mode for the **Shapes** button or the **Ruler** button to be displayed.

- 3 Select the **Tool Color** and **Tool Line Size**.
- 4 Click and drag the cursor across the area for which you want a measurement displayed. Click outside the area when you have finished.
- 5 Click **Save** to save the image with annotations.

Skill Sharpener—Using the Layout Tab

Exercise 1—Annotating an Image

Annotate the photograph of tooth #30 of Ray Adkins. Indicate that the filling is breaking down. Draw a text box near the area of concern to type the text annotation.

To annotate an image:

- 1 Open the **Image Preview** window.
- 2 Right-click on the image of tooth #30. A short-cut menu is displayed.
- 3 Select **Annotate**. The **Image Editor** is displayed.
- 4 Click the **Text** button beneath the photograph.
- 5 Click and drag to draw a text box on the image. When you release the mouse button, the text box is displayed with the words **Your Text Here**.
- 6 Type **Filling is broken**.
- 7 Click anywhere outside the text box. The text annotation is displayed.
- 8 Click the **Shapes** button beneath the photograph.
The shapes available are displayed to the right of the window.
- 9 Select **Pointer**. The cursor changes to a cross.
- 10 Drag a line from the area of concern in the filling to the annotation. The arrowhead of the pointer is located where you click first.
- 11 Click outside the arrow. The annotated image, with text and pointer, is displayed on the photograph.
- 12 Click **Save**.

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