TREATMENT PLANNING FORMS
(Forms with a “bullet” go in a Txt. Plan Packet)

??PROBLEM LIST (yellow)
??Txt. PLAN WORKSHEET
(Complete page 2 of Worksheet before requesting any Consults)

??THE ACCEPTED Txt. PLAN
??SEQUENCING FORM (blue)
(if new forms not ready)
??INFORMED CONSENT FORM
(Take these 3 Forms to Patient Accounting; get signatures 1st)

??Diag. & Txt. Plan Process Eval. Form (blue)
??this is where you get a STARTING CHECK
??Txt. PLAN SUMMARY FORM
(Turn these 2 Forms in at end of clinic session for Grade and S.E.)

RADIOGRAPH REQUEST/Rx. FORM
CONSULT SHEET/PAGE (yellow)
PROGRESS NOTES

Any faculty can sign your paperwork!
(Exception: only the consulting faculty can sign the Consult Sheet; once the Consult Sheet is signed, any faculty can sign the other Forms)
WELCOME TO TREATMENT PLANNING!

1. * Before you enter the patient’s mouth, review the med.hx. and existing dental record and **request a STARTING CHECK**.....it’s **required** to determine which consults will be required and to verify the following **CURRENT RECORDS**:
   
   a. medical records       d. hard tissue exam
   b. x-rays       e. occlusion exam
   c. perio exam       f. x-ray interp

2. if PROS CASE..... proceed with impressions for mounted diagnostic models, **write up a “tentative” plan on a worksheet**. Call for PROS consult 1st, then Oper, Perio, Endo, Oral Surgery consults as indicated by the Pros faculty. You may plan single all metal crowns (FGC) in either OPER or PROS clinics.

3. if OPER CASE......if no missing teeth to be replaced:
   
   a. 1st...... develop a “tentative” Txt. Plan on a TREATMENT PLAN WORKSHEET. Include oral sx, perio, endo, and operative. Develop this “tentative plan” with your current radiographic, clinical, and interp data.
   
   b. 2nd.......CALL FOR CONSULTS (as suggested at the starting check). Operative Faculty will give the Oper Consult LAST, and help you integrate any other consults into the Treatment Plan.

**PLEASE**...DO NOT CALL FOR ANY CONSULTS WITHOUT:

#1. A STARTING CHECK
#2. A “TENTATIVE” PLAN ON A WORKSHEET.

Thanks!  Dr. Riley Nelson
Treatment Plan Clinic Director
SOAP format:  
S=Subjective  
O=Objective  
A=Assessment  
P= Plan  

A progress note summarizes:  “Where was I today? “  
“Where will we go next apt.? “  
“Where will we go next apt.? “  

Given the above format, a simple Progress Note might look like this:

05/25/04  S: Patient presents to 9-S Clinic for Treatment Planning.  
O: Reviewed/updated existing data base & med. history;  established a txt. plan worksheet and problem list(see Existing docs)  
A: Received .....?...... Consults (see consult sheet), made final plan, then did case presentation and paperwork.  
P: RTC: patient finance 1st, then Oper-Pros-Perio Clinics to begin work on....?....

Let me know if you have any questions.  
Dr. Riley Nelson  
Director: Treatment Planning Clinic  
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**PROBLEM:** WHAT TO DO IF YOU RUN OUT OF TIME???

The student and patient are finally ready to proceed to Patient Finance/Accounting BUT Patient Accounting is closed for the day, or the line is too long, or they are gone for lunch, or the patient has to leave NOW.

**REMEDY:** if you received all of the required "signed faculty consults" and have made the Case Presentation to your patient, and have come to some verbal agreement on just what Treatment the patient has accepted, then you may do what I call the "BLUE FLAG POLKA"

?? You have come to a verbal agreement with your Patient.

?? **dismiss your Patient:** tell him/her that you will "call them in a day or 2 to make the 1st appointment, and that they will get some work done next time but that you and the Patient will meet at Patient Finance for a few minutes 1st to make sure that the paperwork is in order"

?? the Patient is gone now (WHEW!)

?? at your leisure, complete the 3 Forms that must go to Patient Finance (Accepted Treatment Plan Form, Sequencing Form (blue), Patient Consent Form)

?? you can do this now, or over lunch, or this evening, or tomorrow, or whenever it is convenient for you. You can tidy up your cubicle and all your worksheets and forms and get help from the ladies at Patient Finance.

?? **Faculty and Student must sign these 3 Forms** (NOT the Patient, you already dismissed him or her, remember?)

?? Student can now proceed to Patient Finance with the chart and the 3 forms (Signed by Faculty & Student only)

?? **Patient Finance will "BLUE FLAG" the chart and remove the hold on the computer which will now allow you to make an appointment to see the Patient (whom you have dismissed)**

?? now you can call the Patient and make that 1st appointment by phone. You will make the appointment for a Pros or Oper or Endo or Perio chair, but you and the Patient will stop at Patient Finance for 5-10 minutes BEFORE the 1st appointment, on the day of that 1st appointment

?? You will find that the "Blue Flag Polka" this is a great stress reliever for those big, confusing cases when you run out of time or the patient has to leave early. **As long as you have had all of the Faculty Consults and have come to a verbal agreement with the Patient, then you can dismiss the Patient and finish the paperwork on your own time.** Obtain the Faculty signatures, do the "BLUE FLAG polka" at Patient Finance, and then call your Patient to make that 1st appointment! And all this can be accomplished w/o the Patient breathing down your neck!!

?? Let me know if there are any questions.

?? Thanks! Dr. Riley Nelson, Director: Treatment Plan Clinic