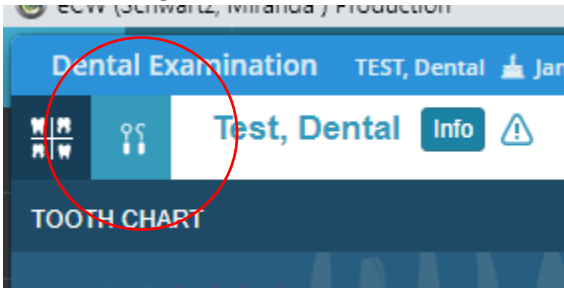
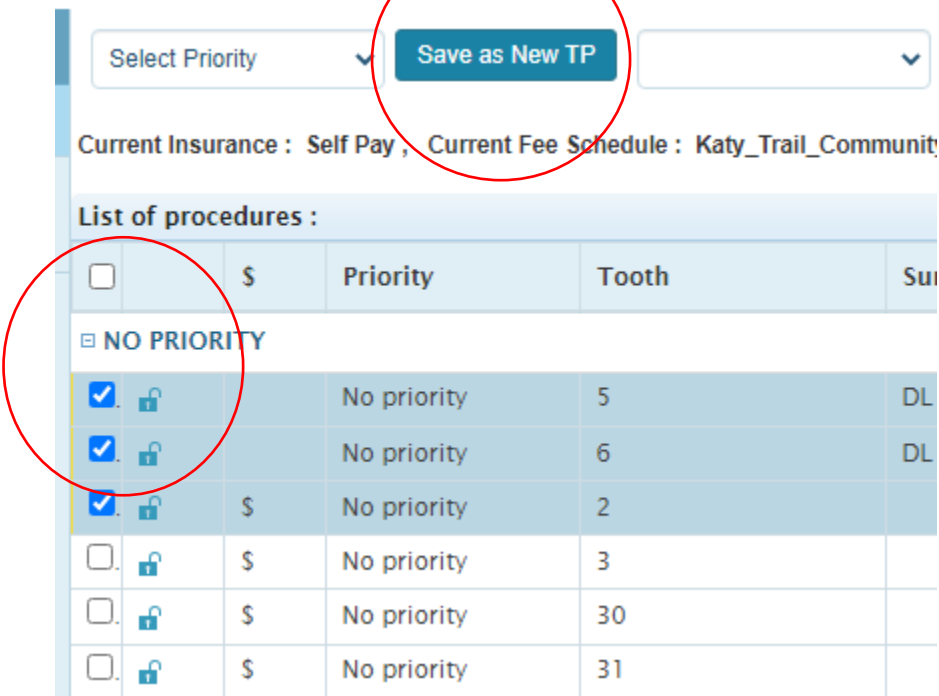


# How to Sign a Dental TX Plan and Publish

- 1) After entering the treatment, access the treatment plan tab in the dental examination window:

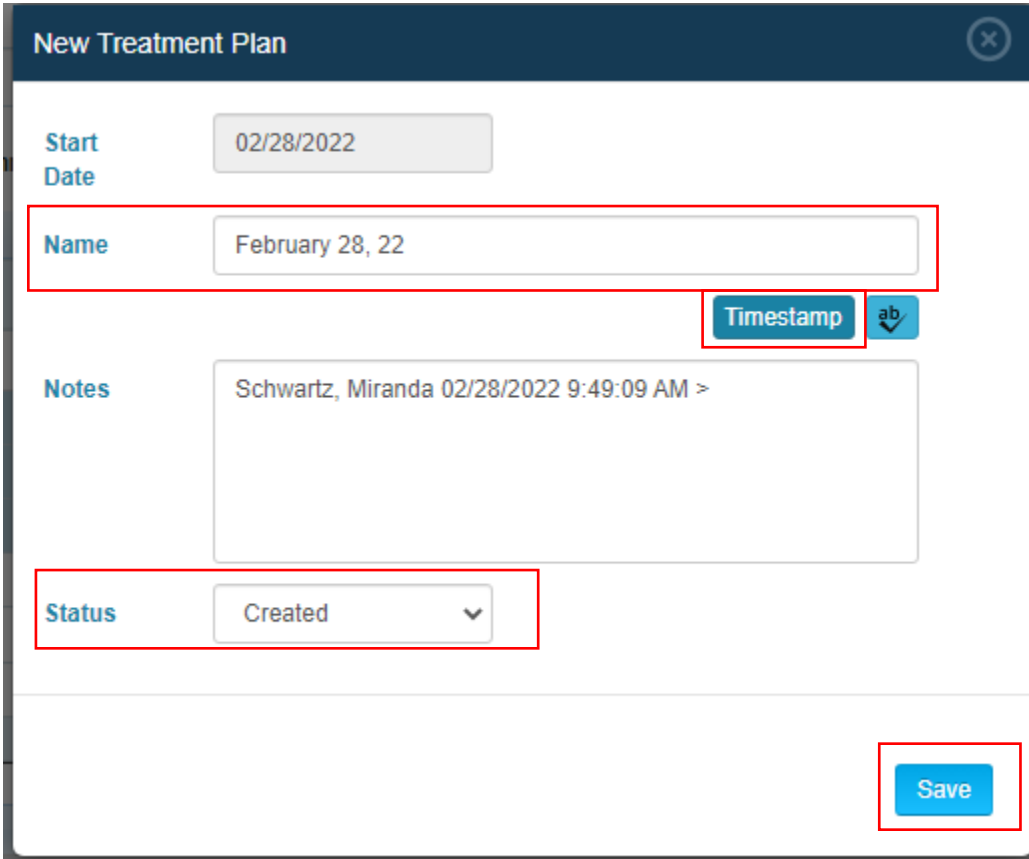


- 2) Select the procedures that will be part of the treatment plan by clicking the boxes next to the treatment name, then click Save as New TP:



# How to Sign a Dental TX Plan and Publish

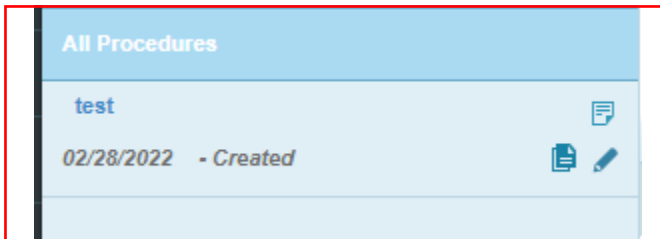
3) Enter the day's date as the treatment name, time stamp to record staff, then select a status.






The screenshot shows a 'New Treatment Plan' form with the following fields and actions:

- Start Date:** 02/28/2022
- Name:** February 28, 22
- Timestamp:** A button labeled 'Timestamp' with a dropdown arrow.
- Notes:** Schwartz, Miranda 02/28/2022 9:49:09 AM >
- Status:** Created
- Save:** A blue button at the bottom right.

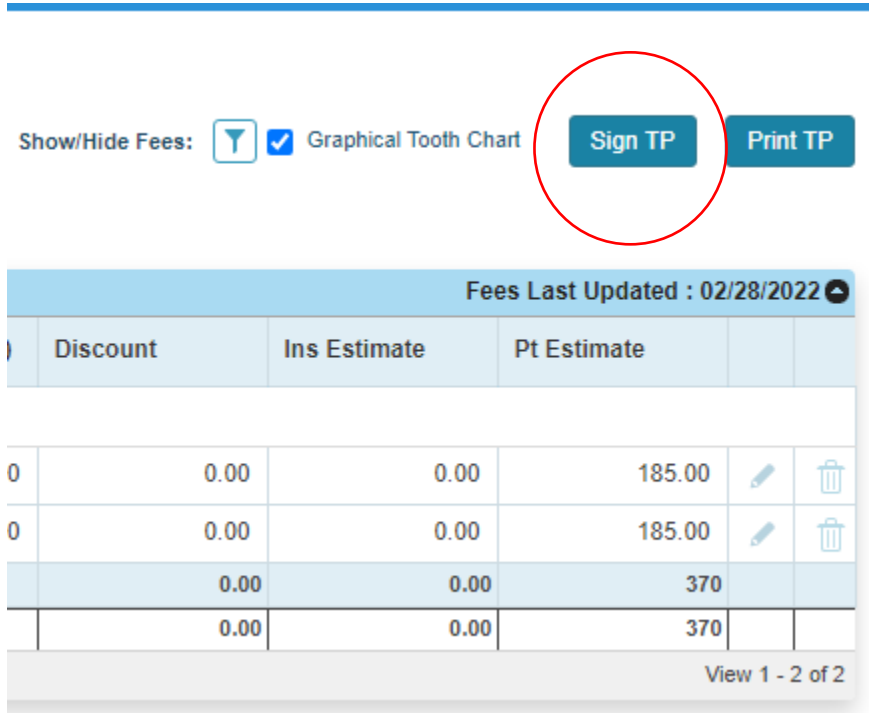
4) Click on the saved treatment plan in the far-left column.



All Procedures	
test	
02/28/2022 - Created	 

# How to Sign a Dental TX Plan and Publish

- 5) Once the treatment plan opens up, click on Sign TP in the upper right corner.



Show/Hide Fees:   Graphical Tooth Chart **Sign TP** **Print TP**


Fees Last Updated : 02/28/2022

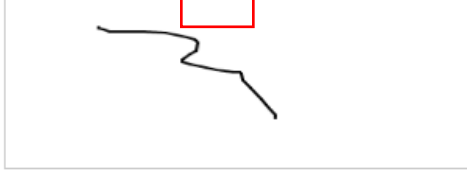
	Discount	Ins Estimate	Pt Estimate		
0	0.00	0.00	185.00		
0	0.00	0.00	185.00		
	0.00	0.00	370		
	0.00	0.00	370		

View 1 - 2 of 2




- 6) Once the patient agrees to the proposed treatment, have them sign electronically in the patient box and staff member sign in the staff box. Next, click save to documents and save. You do have the option to print the signed treatment plan.

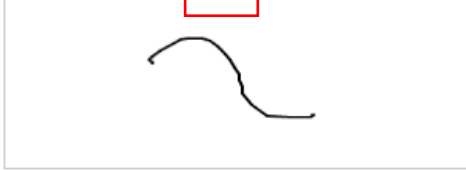
NOTE:

Please Sign Here   



**Patient/Guardian**  
2/28/2022, 9:30 AM

Please Sign Here    **Clear**



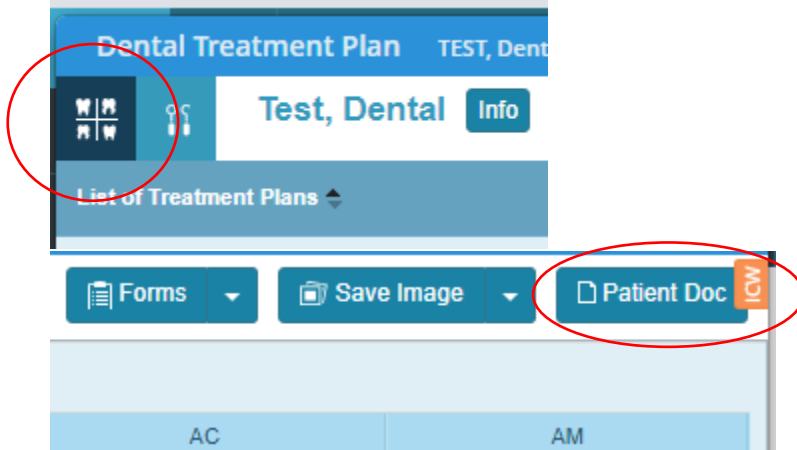
**Financial Coordinator**  
Electronically signed by Miranda Schwartz on 02/28/2022 at 09:30 AM CST

*If you have dental insurance, please be aware that THIS IS AN ESTIMATE ONLY. Coverage may be different if your deductible has not been met, annual maximum has been met, or if your coverage table is lower than average*

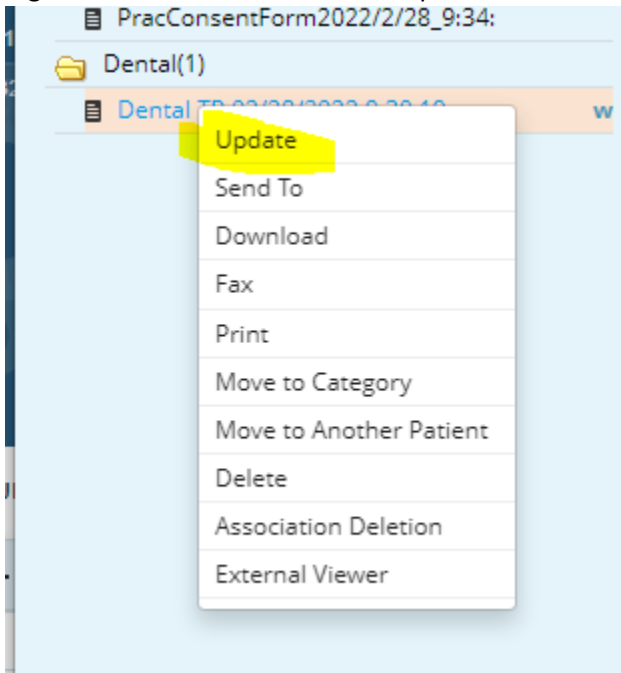
Logs **Save to Patient Docs** Print **Save**

# How to Sign a Dental TX Plan and Publish

- 7) Once the TP has been saved, close the pop-up and return to the dental examination window to access the patient's documents.

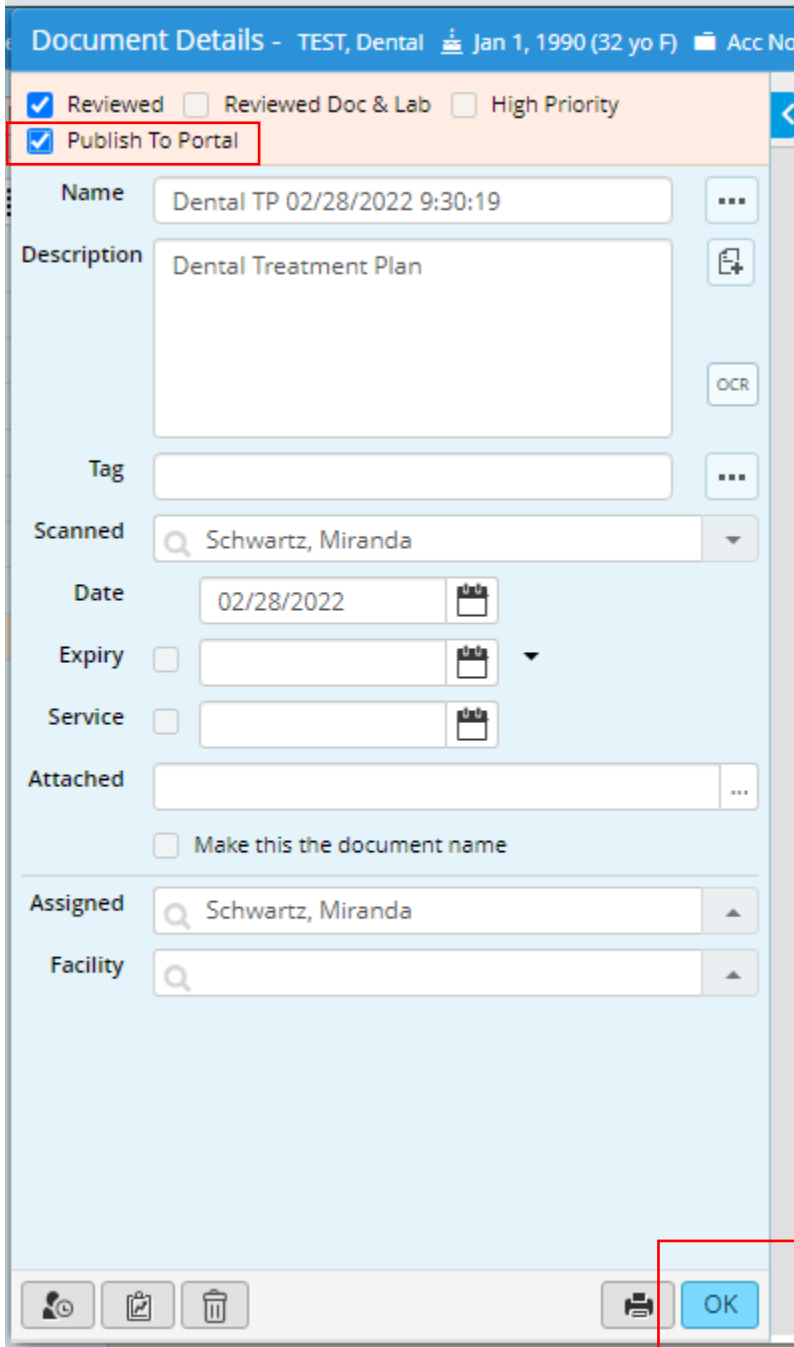


- 8) Right click on the saved treatment plan in the dental folder.



# How to Sign a Dental TX Plan and Publish

9) Click on Publish to Portal, then click OK.



Document Details - TEST, Dental Jan 1, 1990 (32 yo F) Acc No.

Reviewed  Reviewed Doc & Lab  High Priority

Publish To Portal

Name: Dental TP 02/28/2022 9:30:19

Description: Dental Treatment Plan

Tag: [Empty]

Scanned: Schwartz, Miranda

Date: 02/28/2022

Expiry: [Empty]

Service: [Empty]

Attached: [Empty]

Make this the document name

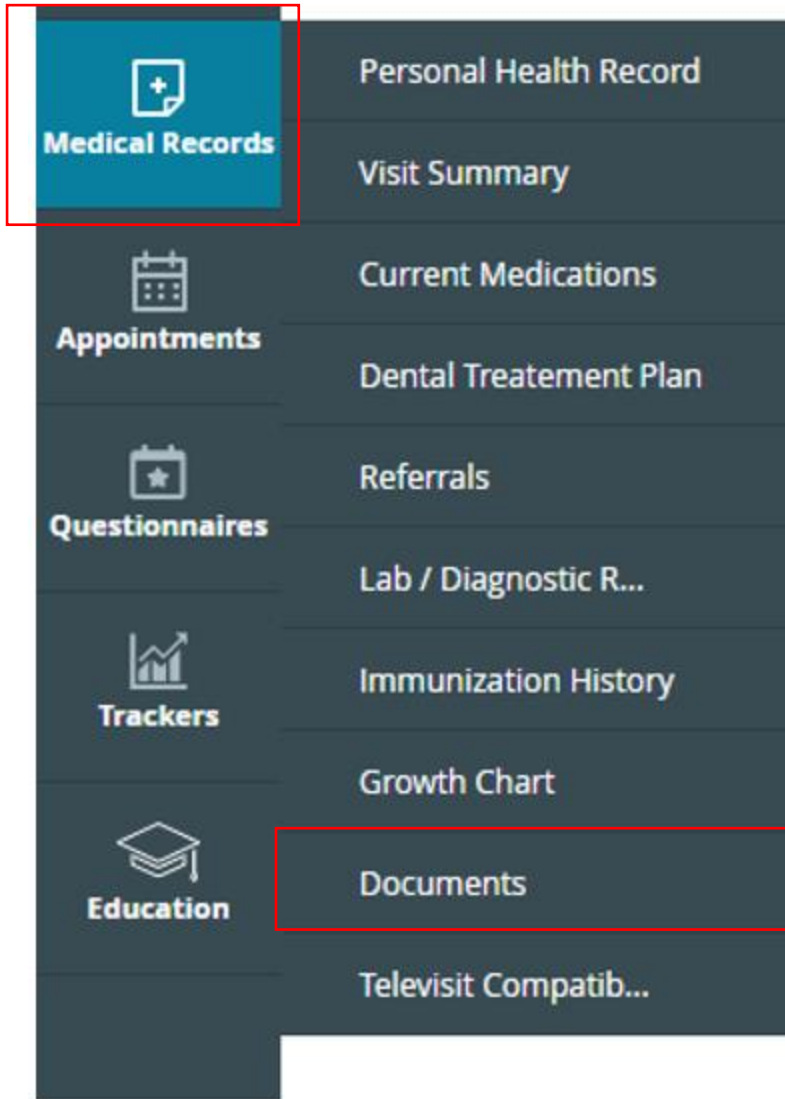
Assigned: Schwartz, Miranda

Facility: [Empty]

OK

10) The patient will access this document by logging into their portal, selecting Medical Records, then documents.

# How to Sign a Dental TX Plan and Publish



The screenshot shows a dark-themed sidebar menu with the following items:

- Medical Records** (highlighted with a red box)
- Personal Health Record
- Visit Summary
- Appointments
- Current Medications
- Dental Treatment Plan
- Questionnaires
- Referrals
- Lab / Diagnostic R...
- Trackers
- Immunization History
- Growth Chart
- Education
- Documents** (highlighted with a red box)
- Televisit Compatib...

Document Name	Published Date	Type
Dental TP 02/28/2022 9:30:19	02/28/2022	 pdf

Navigation: Page 1 of 1 | View 1 - 1 of 1