

# FLOW: Charting Planned Items

## 1 From Charting

The screenshot displays a dental software interface for charting. On the left, there are several filter menus: 'Fixed / Remove Prosth.', 'Endo / Perio / Surgery', 'Other Services', and 'Conditions'. Below these is the 'View Mode' section with a color-coded legend for 'Conditions', 'Planned', 'Completed', 'Existing', 'Declined', and 'Referred Out'. An orange circle highlights the 'Planned' item in the legend. Below the legend is the 'Entry Mode' dropdown set to 'Planned', and fields for 'Provider' (Nichols, Tiffanye) and 'Hygienist'. The main area shows a dental chart with teeth numbered 32 to 17. Below the chart are tabs for 'Charting', 'Treatment Plans', 'Alerts', and 'Chart Notes'. The 'Charting' tab is active, showing a table with columns for Order, Date, Code, Description, Tooth, Surfaces, Provider, Fee, Status, and Created. The table is currently empty, displaying 'No data to display'. The bottom of the screen shows a Windows taskbar with various application icons.

## 2 From Entry Mode

The screenshot shows the dental software interface. On the left, there are several dropdown menus: 'Fixed / Remove Prosth.', 'Endo / Perio / Surgery', 'Other Services', and 'Conditions'. Below these is the 'View Mode' section with a list of status options: 'Conditions', 'Planned', 'Completed', 'Existing', 'Declined', and 'Referred Out'. The 'Entry Mode' dropdown is currently set to 'Planned' and is highlighted with an orange circle. The main area displays a dental chart with teeth numbered 32 to 17. Below the chart, there are tabs for 'Charting', 'Treatment Plans', 'Alerts', and 'Chart Notes'. The 'Charting' tab is active, showing a table with columns for 'Order', 'Date', 'Code', 'Description', 'Tooth', 'Surfaces', 'Provider', 'Fee', 'Status', and 'Created'. The table is currently empty, displaying 'No data to display'. The Windows taskbar is visible at the bottom.

## 3 Use the drop-menu; Click "Planned"

This screenshot is identical to the previous one, but the 'Entry Mode' dropdown menu is open, showing a list of options: 'Planned', 'Planned', 'Completed', and 'Existing Restoration'. The first 'Planned' option is highlighted with an orange circle, indicating it has been selected. The rest of the interface, including the dental chart and the empty table, remains the same.

## 4 Using the quick buttons you can select the category needed

Chart Items

Select an item...

- Diagnostic/Preventative
- Multicodes/Combos
- Restorative
- Fixed / Remove Prosth.
- Endo / Perio / Surgery
- Other Services
- Conditions

View Mode

- Conditions
- Planned
- Completed
- Existing
- Declined
- Referred Out

Entry Mode

Planned

Charting Treatment Plans Alerts Chart Notes

Primary Insurance: Ameritas Life Ins. Corp. Used + Insurance Pending/Max:Individual: \$0.00 + \$0.00 /

Order Date Code Description Tooth Surfaces Provider Fee Status Created

No data to display

## 5 Select the icon that represents the treatment needed

Chart Items

Select an item...

- Diagnostic/Preventative
- Multicodes/Combos
- Restorative
- Fixed / Remove Prosth.
- Endo / Perio / Surgery
- Other Services
- Conditions

View Mode

- Conditions
- Planned
- Completed
- Existing
- Declined

Entry Mode

Planned

Charting Treatment Plans Alerts Chart Notes

Primary Insurance: Ameritas Life Ins. Corp. Used + Insurance Pending/Max:Individual: \$0.00 + \$0.00 /

Order Date Code Description Tooth Surfaces Provider Fee Status Created

No data to display

Resin-based composite - two surfaces anterior

## 6 Click the tooth/surface/area for the selected treatment planned

Chart - Arizona, Sunny

Chart Items: D2331 - resin-based composite - ...

Diagnostic/Preventative

Multicodes/Combos

Restorative

Fixed / Remove Prosth.

Endo / Perio / Surgery

Other Services

Conditions

View Mode

Conditions

Planned

Completed

Existing

Declined

Charting Treatment Plans Alerts Chart Notes

Primary Insurance: Ameritas Life Ins. Corp. Used + Insurance Pending/Max:Individual: \$0.00 + \$0.00 /

<input type="checkbox"/>	Order	Date	Code	Description	Tooth	Surfaces	Provider	Fee	Status	Created
No data to display										

## 7 Repeat the steps above for all the treatment items planned

Chart - Arizona, Sunny

Chart Items: D2331 - resin-based composite - ...

Diagnostic/Preventative

Multicodes/Combos

Restorative

Fixed / Remove Prosth.

Endo / Perio / Surgery

Other Services

Conditions

View Mode

Conditions

Planned

Completed

Existing

Declined

Referred Out

Charting Treatment Plans Alerts Chart Notes

Primary Insurance: Ameritas Life Ins. Corp. Used + Insurance Pending/Max:Individual: \$0.00 + \$0.00 /

<input type="checkbox"/>	Order	Date	Code	Description	Tooth	Surfaces	Provider	Fee	Status	Created
<input type="checkbox"/>			D2392	resin-based composite - two su	2	MO	Nichols, Tiffanye	\$350.00	Planned	

8

If there is not a quick button for a specific procedure needed, you can enter manually; click Add Item

Charting Treatment Plans Alerts Chart Notes

Primary Insurance: Ameritas Life Ins. Corp. Used + Insuranc Add Item Individual: \$0.00 + \$0.00 /

Order	Date	Code	Description	Tooth	Surfaces	Provider	Fee	Status	Created
<input type="checkbox"/>		D2392	resin-based composite - two su	2	MO	Nichols, Tiffany	\$350.00	Planned	8/18/25
<input type="checkbox"/>		D2393	resin-based composite - three s	31	MOD	Nichols, Tiffany	\$370.00	Planned	8/18/25
<input type="checkbox"/>		D2391	resin-based composite - one su	18	O	Nichols, Tiffany	\$290.00	Planned	8/18/25
<input type="checkbox"/>		D7210	extraction erupted tooth requir	32		Nichols, Tiffany	\$0.00	Planned	8/18/25
<input type="checkbox"/>		D7210	extraction erupted tooth requir	1		Nichols, Tiffany	\$0.00	Planned	8/18/25

9

This will open the Charge Detail Screen

Charge Detail

Details

Patient: Arizona, Sunny - ARISU000 Date: mm/dd/yyyy Billing: Type to search Provider: Nichols, Tiffany - NIC00 Status: Plann

Account Code: Type to search Description: Tooth: Fee:

Note:

Claim & Billing Info

Place of Service: Office Unit of Time:

Do Not Bill Insurance  
Do Not Bill Patient  
No Insurance 1  
No Insurance 2

Treatment Planning

Treatment Order: Treatment Plan Option:

Estimate Billed

Diagnosis

Diagnosis 1: Diagnosis 2:  
Diagnosis 3: Diagnosis 4:

## 10 Enter the procedure "D" code and tooth number as needed

If you do not know the procedure code; you can use the magnifying glass to search codes

The screenshot shows the 'Charge Detail' form in the FLOW by Dentimax system. The 'Account Code' field is highlighted with a magnifying glass icon, and a dropdown menu is open showing 'D0330 - panoramic radiographic image' selected. The form includes fields for Patient, Date, Billing, Provider, Status, Description, Tooth, and Fee. Below the main form are sections for Claim & Billing Info, Treatment Planning, and Diagnosis.

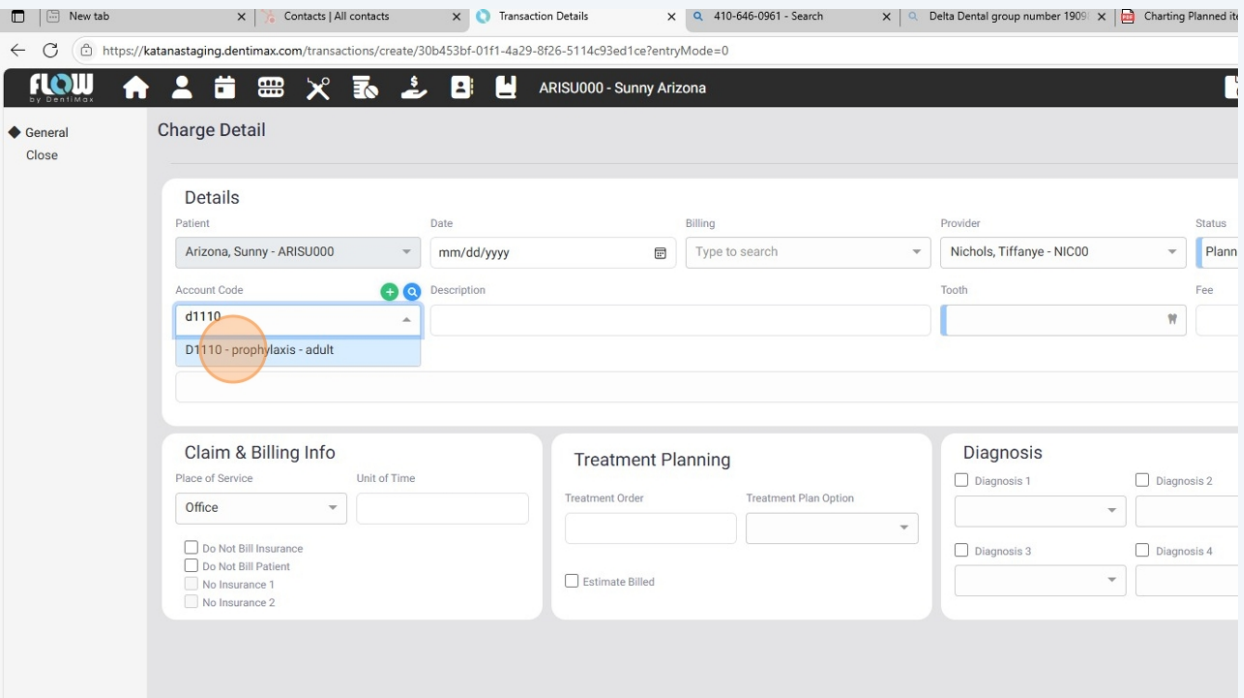
## 11 After entering the procedure code and info; you have two options to save and continue.

If you have additional procedures to enter: Click Save and New.

The screenshot shows the 'Charge Detail' form in the FLOW by Dentimax system. The 'Save and New' button is highlighted with a magnifying glass icon. The form shows the 'Account Code' field filled with 'D0330 - panoramic radiographic ima...' and the 'Description' field filled with 'panoramic radiographic image'. The 'Fee' field is set to '\$400.00'. The form includes sections for Claim & Billing Info, Treatment Planning, and Diagnosis.

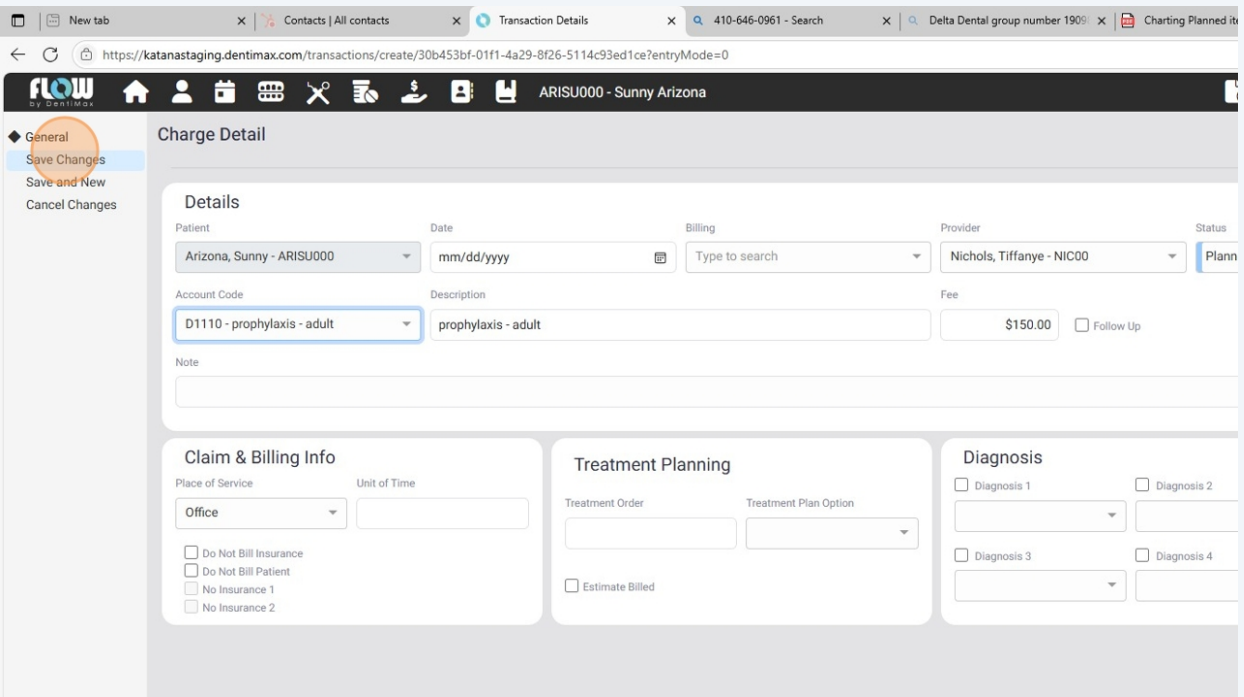
12

This will leave you in the Charge Detail screen to enter the next procedures as needed.



13

When you have entered all procedures needed; click Save Changes to return back to charting



## 14 Another option for entering planned item is using Add A Multicode

A Multicode is a bursting code; you have one "code" to click that can have up to 16 procedures attached to it

The screenshot displays a dental software interface. At the top, there is a tooth chart with teeth numbered 32 to 17. Below the chart, there are tabs for 'Charting', 'Treatment Plans', 'Alerts', and 'Chart Notes'. A 'Primary Insurance' section shows 'Ameritas Life Ins. Corp.' and an 'Add A Multicode' button. Below this is a table of planned procedures.

Order	Date	Code	Description	Tooth	Surfaces	Provider	Fee	Status	Created
<input type="checkbox"/>		D0330	panoramic radiographic image			Nichols, Tiffanye	\$400.00	Planned	8/18/25
<input type="checkbox"/>		D1110	prophylaxis - adult			Nichols, Tiffanye	\$150.00	Planned	8/18/25
<input type="checkbox"/>		D7210	extraction erupted tooth requiri	1		Nichols, Tiffanye	\$0.00	Planned	8/18/25
<input type="checkbox"/>		D2391	resin-based composite - one su	18	O	Nichols, Tiffanye	\$290.00	Planned	8/18/25
<input type="checkbox"/>		D2392	resin-based composite - two su	2	MO	Nichols, Tiffanye	\$350.00	Planned	8/18/25
<input type="checkbox"/>		D2393	resin-based composite - three s	31	MOD	Nichols, Tiffanye	\$370.00	Planned	8/18/25
<input type="checkbox"/>		D7210	extraction erupted tooth requin	32		Nichols, Tiffanye	\$0.00	Planned	8/18/25

15

This will open a default list of Multicodes that DentiMax provides. You can edit, remove or create you own if needed. See Multicodes

Example: Click "PFG Crown Bulidup & Seat" then click the tooth needed

This will add multiple procedures to the planned items.

