

FLOW: moving planned item to another treatment plan option

1 From Charting screen, click on Treatment Plans tab

The screenshot displays a dental software interface. On the left, there are dropdown menus for 'Select an item...' (Diagnostic/Preventative, Multicodes/Combos, Restorative, Fixed / Remove Prosth., Endo / Perio / Surgery, Other Services, Conditions) and 'View Mode' (Conditions, Planned, Completed, Existing, Declined, Referred Out). Below these are 'Entry Mode' (Planned), 'Provider' (Nichols, Tiffanye), and 'Hygienist' fields. The main area shows a dental chart with teeth 32 to 17. A 'Treatment Plans' tab is highlighted with an orange circle. Below the chart is a table of planned items:

Order	Date	Code	Description	Tooth	Surfaces	Provider	Fee	Status	Created
<input type="checkbox"/>		D0220	intraoral - periapical first radiog			Nichols, Tiffanye	\$89.00	Planned	8/21/2
<input type="checkbox"/>		D9248	non-intravenous conscious sedi.			Nichols, Tiffanye	\$0.00	Planned	8/21/2
<input type="checkbox"/>		D2392	resin-based composite - two su	12	MO	Nichols, Tiffanye	\$350.00	Planned	8/21/2
<input type="checkbox"/>		D6010	surgical placement of implant b	19		Nichols, Tiffanye	\$0.00	Planned	8/21/2
<input type="checkbox"/>		D6058	abutment supported porcelain/	19		Nichols, Tiffanye	\$0.00	Planned	8/21/2
<input type="checkbox"/>		D6056	prefabricated abutment - includ	19		Nichols, Tiffanye	\$0.00	Planned	8/21/2
<input type="checkbox"/>		D2140	amalgam - one surface primary	2	B	Nichols, Tiffanye	\$0.00	Planned	8/21/2
<input type="checkbox"/>		D2790	crown - full cast high noble me	3		Nichols, Tiffanye	\$0.00	Planned	8/21/2

2 Create new treatment plan

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

Provider

Nichols, Tiffanye

Hygienist

Plan Option	Default Plan	Name	Date Created
1	<input checked="" type="checkbox"/>		8/5/25
2	<input type="checkbox"/>	test	8/21/25

Treatment Plan Note

Insert plan notes here ...

3 On the original treatment plan where all the planned items are:

Double click on the selected procedure to open the transactions screen

Fixed / Remove Prosth.

Endo / Perio / Surgery

Other Services

Conditions

View Mode

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

Entry Mode

Planned

Provider

Nichols, Tiffanye

Hygienist

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<input type="checkbox"/>		D2140	amalgam - one surface primary	2	B	Nichols, Tiffanye	\$0.00	Planned	8/21/25
<input type="checkbox"/>		D2790	crown - full cast high noble mel	3		Nichols, Tiffanye	\$0.00	Planned	8/21/25
<input type="checkbox"/>		D2393	resin-based composite - three s	31	MOD	Nichols, Tiffanye	\$370.00	Planned	8/21/25

4 In the Treatment Planning box

Client: TESTE000 | Date: mm/dd/yyyy | Billing: Type to search | Provider: Nichols, Tiffanye - NIC00 | Status: Planned

Description: non-intravenous conscious sedation | Fee: \$0.00 | Follow Up

Billing Info

Code of Service: | Unit of Time: |
Bill Insurance: | Bill Patient Insurance 1: | Insurance 2: |

Treatment Planning

Treatment Order: | Treatment Plan Option: 1 - 8/5/25
 Estimate Billed

Diagnosis

Diagnosis 1 | Diagnosis 2
 Diagnosis 3 | Diagnosis 4

Estimated Response

Override Estimate
Insurance 1: |

5 Use the drop-down menu to select the treatment plan that you want to move the planned item to

Client: Teddy - TESTE000 | Date: mm/dd/yyyy | Billing: Type to search | Provider: Nichols, Tiffanye - NIC00 | Status: Planned

Account Code: 9248 - non-intravenous conscious ... | Description: non-intravenous conscious sedation | Fee: \$0.00 | Follow Up

Claim & Billing Info

Code of Service: | Unit of Time: |
 Do Not Bill Insurance
 Do Not Bill Patient
 No Insurance 1
 No Insurance 2

Treatment Planning

Treatment Order: | Treatment Plan Option: 1 - 8/5/25, 2 - 8/21/25 - test, 1 - 8/5/25
 Estimate Billed

Diagnosis

Diagnosis 1 | Diagnosis 2
 Diagnosis 3 | Diagnosis 4

Estimate

Override Estimate
Insurance 1: |

6 Save Changes

Charge Detail

Details

Patient: test, Teddy - TESTE000 | Date: mm/dd/yyyy | Billing: Type to search | Provider: Nichols, Tiffanye - NIC00 | Status: Plann

Account Code: D9248 - non-intravenous conscious ... | Description: non-intravenous conscious sedation | Fee: \$0.00 | Follow Up

Note: [Empty text area]

Claim & Billing Info

Place of Service: [Dropdown] | Unit of Time: [Dropdown]

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

Treatment Planning

Treatment Order: [Dropdown] | Treatment Plan Option: 2 - 8/21/25 - test
 Estimate Billed

Diagnosis

Diagnosis 1 | Diagnosis 2
 Diagnosis 3 | Diagnosis 4

7 You would do this for any planned item that you want moved to another treatment plan option.

Fixed / Remove Prosth. [Dropdown]
Endo / Perio / Surgery [Dropdown]
Other Services [Dropdown]
Conditions [Dropdown]

View Mode

- Conditions [Color swatch]
- Planned [Color swatch]
- Completed [Color swatch]
- Existing [Color swatch]
- Declined [Color swatch]
- Referred Out [Color swatch]

Entry Mode
Planned [Dropdown]
Provider: Nichols, Tiffanye [Dropdown]
Hygienist: [Dropdown]

Charting | Treatment Plans | Alerts | Chart Notes

Primary Insurance: Aetna | Used + Insurance Pending/Max: Individual: \$1,000.00 + \$0.00 / \$1,000.00

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<input type="checkbox"/>		D2393	resin-based composite - three s	31	MOD	Nichols, Tiffanye	\$370.00	Planned	8/21/25
<input type="checkbox"/>		D2750	crown - porcelain fused to high	8		Nichols, Tiffanye	\$0.00	Planned	8/21/25