Carestream DENTAL

Training Workbook

SoftDent Charting Module

Your Guide to a Successful Transition

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SoftDent Charting Module

Training Workbook

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Contents

Lesson 1—Navigating the Charting Module

Understanding Basic Concepts 1
Accessing the Charting Module 1
Closing and Exiting the Charting Module 1
Understanding the Charting Module 2
Main Toolbar 2
Patient Banner 3
Common Toolbar 4
Description Toolbar 5
Showing/Hiding Toolbar Titles 5
Menus 6
File Menu 6
Chart Menu 6
Perio Menu 6
Mode Menu 7
View Menu 7
Video Menu 8
X-ray Menu 8
Clinical Notes Menu 8
Save All Menu 8
Help Menu 8

Lesson 2—Using the Overview Tab

Understanding the Overview Tab 11
Accessing the Overview Tab 12
Setting Tab Options 13
Accessing Charting Tabs 13

Lesson 3—Using the Restorative Tab

Understanding Basic Functions 15
Setting Restorative Tab Options 15
Accessing the Restorative Tab 16
Restorative Tab Toolbars 17
Chart Mode Toolbar 17
Procedure Codes Toolbar 18
Conditions Toolbar 19
Mobility Toolbar 19

Lesson 4—Using the Perio Tab

Setting Perio Chart Options 21
Accessing the Perio Chart 22
Overview of the Perio Tab 23
Perio Tab Toolbars 23
Perio Views Toolbar 23
Probe Toolbar 24
Keypad Toolbar 25
How SoftDent Charting Works on the Perio Tab 26
Perio Mobility Toolbar 26
Plaque Toolbar 26
Calculus Toolbar 27
Perio Conditions Toolbar 27
Creating Custom Charting Paths 27
Using Auto Advance for Charting 28

Perio Menu 29
Using the Voice Activation Module 29
Activating Voice Recognition 29
Installing the Voice Activation Module 30
Testing Microphone/Headset Levels 30
Setting Microphone/Headset Levels 30
Training the Voice Activation Module 30
Using Voice Recognition Commands 31

Lesson 5—Using the Exams Tab

Setting the Default Exams Sequence 33
Accessing the Exams Tab 34
Using Exams Toolbars 35
Patient Exams Toolbar 35
Exam Options Toolbar 35
Common Toolbar 35
Using the Exams Tab 36
Performing Soft Tissue Exams 36
Performing Periodontal Tissue Exams 36
Performing Occlusal Exams 37
Performing TMJ Exams 37
Performing PSR Exams 38

Lesson 6—Using the Clinical Imaging Tab

Setting Video Capture Options 41
Accessing the Clinical Imaging Tab 43
Using the Clinical Imaging Toolbars 44
Common Toolbar 44
Clinical Imaging Toolbar 44
Image Layout Toolbar 44
Image Capture Toolbar 45
Image Annotate Toolbar 46
Image Editor Toolbar 46
Using the Clinical Imaging Tab 47
Viewing Images 47
Annotating and Editing Images 47
Using Organization Mode 48
Displaying Fewer Images 48

Lesson 7—Using the Treatment Planning Tab

Understanding the Treatment Planning Tab 51
Setting Chart Options 51
Accessing the Treatment Planning Tab 52
Using the Treatment Planning Tab Toolbars 53
Common Toolbar 53
Treatment Plan Mode Toolbar 53
. 53
Treatment Plan Toolbar 53
Creating Treatment Plan Groups 54
Moving Items from One Group to Another 54
Moving Items to Another Treatment Plan 55
Accepting Treatment Plan Procedures 55
Updating a Treatment Plan Group 55
Printing a Treatment Plan 56
Completing a Treatment Plan Group 57
Completing Selected Items in a Group 57
Deleting Treatment Plan Items 57
Building Case Presentations 58
Working with Case Presentations 58
Show a Case Presentation 59
Editing Case Presentations 59
Emailing Case Presentations 60

Lesson 8—Using Notes in Charting

Understanding Clinical Notes in Charting 63
Using Patient Clinical Notes 63
Accessing the Notes Tab 64
Adding Patient Clinical Notes 65
Editing Patient Clinical Notes 66
Amending Patient Clinical Notes 66
Adding Clinical Notes While Posting 66
Adding Clinical Notes at End of the Day 66
Reviewing Patient Clinical Notes 67
Creating Default Clinical Notes 67
Adding Clinical Notes for Treatment Plans 68
Handling Generic Clinical Notes 68
Creating Generic Clinical Notes 68
Editing Generic Clinical Notes 68
Copying Generic and Default Clinical Notes 69
Reviewing Generic and Default Clinical Notes 69

Lesson 9—Using the Labs Tab

Accessing the Labs Tab 71
Adding a Lab Case 72
Editing a Lab Case 72
Deleting a Lab Case 72

Lesson 10—Using the Documents Tab

Accessing the Documents Tab 76
Using the Document Manager 77
Reviewing Documents 77
Organizing Documents in the Document Tree 77
Managing Documents 77
Setting Properties 77
Setting Capture Preferences 78
Adding New Documents 78
Editing Documents 79
Emailing Documents 79
Annotating Images 80
Changing Categories 80

Index

Lesson 1

Navigating the Charting Module

This lesson includes:

- Understanding Basic Concepts
- Accessing the Charting Module
- Understanding the Charting Module

See the SoftDent Practice Management software online help for more information.

Understanding Basic Concepts

The charting module contains a large number of icons. If you hold your cursor over an icon, the name of the icon is displayed. If you click an icon, a specific tool is opened.

The toolbar at the top of the charting module remains constant; it is the same in every part of the charting module. The toolbars on the right of the charting module are context-sensitive; they change as you move to different areas of the charting module.

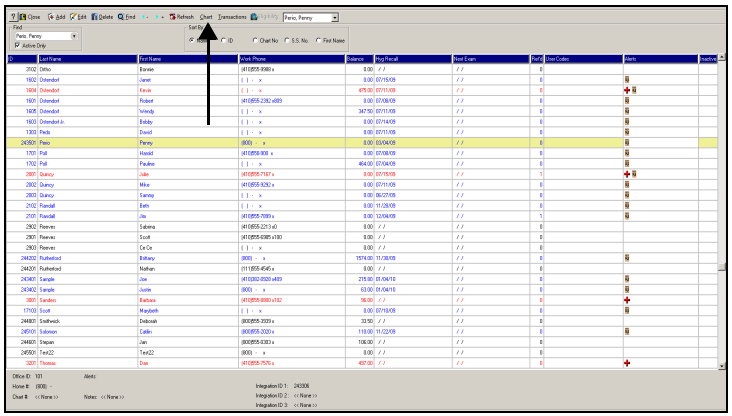
You can set basic options in the charting module by selecting **Chart > Options**.

Accessing the Charting Module

You can access the charting module from the **Patient List** window or from the scheduler in the SoftDent practice management software.

To access the charting module from the **Patient List** window:

1 Select **List > Patient**. The **Patient List** window is displayed.



2 Select the patient you want.

3 Click the **Chart** button at the top of the **Patient List** window. The charting module opens, and the chart for the selected patient is displayed.

Closing and Exiting the Charting Module

Closing and exiting are not synonymous in the charting module. If you select **File > Close Charting Module** or click **Close** on the main toolbar, you close the charting module and return to SoftDent.

If you exit the charting module by selecting **File > Exit**, you close the SoftDent software, too.

Note

The charting module can also be accessed from the **In Office** window or from the **Options** bar.

Understanding the Charting Module

The charting module contains these tabs: **Overview**, **Restorative**, **Perio**, **Exams**, **Clinical Imaging**, **Treatment Planning**, **Notes**, **Labs**, and **Documents**. By default the **Overview** tab is active when you open the charting module.

When you open a chart, a **Watch Summary** window is displayed if a watch is present. A blue circle around a tooth number indicates a normal watch, and a red circle indicates a critical watch.

To the right of the main work area of each tab are a series of toolbars. The toolbars and the buttons on each toolbar change, depending on which tab you have selected. The section below the chart is called the **Clinical Detail Tab Container**. It displays two tabs: **Clinical History** and **Clinical Images**, if you have the dental imaging software.

Main Toolbar

The Main toolbar at the top of the window is constant. It remains the same regardless of which tab you have selected, although not all buttons are operational on all tabs.

The main toolbar contains these buttons:

Help–Opens the online help system.

Close–Closes the charting module and returns to the SoftDent software. If you want to close SoftDent too, select **File > Exit**.

Save All–Saves any changes that have been made to an open chart.

Print–Prints a patient's chart, treatment plan information, exam information, and clinical notes with the chart. To set up the printer, select **File > Print Setup**. Select the options and click **OK**.

Full Mouth/Quad–Displays detailed views of the four quadrants of the mouth.

Maximize Chart View–Enlarges the chart, hiding the **Clinical Detail Tab Container**, with the **Clinical History** and the **Clinical Images** tabs.

Chart with Clinical History–Displays the **Clinical History** tab below the chart. Use this button when you have hidden the chart, but want to display it again.

Chart with Clinical Images–Displays the **Clinical Images** tab below the chart. Use this button when you have hidden the chart, but want to display it again.

Maximize the Clinical Ledger View–Maximizes the **Clinical History** tab and hides the chart. This is used to see the patient's entire clinical history. To revert to the view with the chart, click **Chart with Clinical History**.

Maximize the Image Thumbnail View–Maximizes the **Clinical Images** tab and hides the chart. To revert to the view with the chart, click the **Chart with Clinical Images** button.

Provider List–Displays the **Provider List** window. Select the provider who is entering clinical notes and treatment planning and conditions.

Add a Descriptive Note–Opens the **Patient Clinical Notes List** window. You can enter or amend clinical notes for a patient.

Use these buttons to open imaging applications:

Start Carestream Dental Imaging Software–Opens the Dental Imaging software. This button is disabled if you do not have the software.

Capture a panoramic image using Carestream Dental Imaging Software–Capture a panoramic image. This button is disabled if you do not have the 8000, or later, panoramic unit installed.

Capture a 3D image using Carestream Dental Imaging Software–Capture a 3D image. This button is disabled if you do not use Dental Imaging software and have the 3D module installed.

Capture a cephalometric image using the Carestream Dental Imaging Software–Accesses the software to capture a cephalometric image. This button is disabled if you do not use Dental Imaging software and have the 8000C or CS 9000C panoramic and cephalometric unit installed.

Capture an RVG image using Carestream Dental Imaging Software–Capture an RVG image. This button is disabled if you do not have a digital radiography system installed.

Capture an intraoral image using Carestream Dental Imaging Software–Capture an intraoral image. This button is disabled if you do not have a digital camera or an intraoral camera installed.

Acquire new CR image–Capture a CR image. This button is disabled if you do not use Dental Imaging software and have the Carestream Dental CR installed.

Capture a new Intraoral Scanner digital impression–Capture an intraoral image. This button is disabled if you do not use Dental Imaging software and have the CS 3600 or CS 3500 installed.

Scan a 3D Object Using Carestream Dental Imaging Software–Scan a 3D object. This button is disabled if you do not use Dental Imaging software.

Start Medvisor Software–Opens the Medvisor software in a patient's chart. This button is disabled if you do not use Medvisor.

Patient Banner

At the top of the chart, the patient banner–also called the Header bar–enables you to see information about the patient, regardless of the tab that you are on.

The banner displays the following:

- **Patient Info**–Displays the patient's portrait or avatar, ID, name, and nickname. Click the portrait or avatar to display the **Patient Portrait** window. Hover over the patient's name and click the link to display the **Patient Information** window.

- **Chart Mode** and **Quadrant**–Displays the chart and the quadrant of the mouth you are viewing. The modes and quadrants change, depending on the chart you are viewing.
- **Medical Alerts**–Displays medical alerts for the patient. If the patient has multiple alerts and **...** is displayed, hover over the **Alerts** area to view all of them, or click the link to display the **Conditions** tab of the **Medical History** window.
- **Allergies**–Displays allergies the patient has. If the patient has multiple allergies and **...** is displayed, hover over the **Allergies** area to view all of them, or click the link to display the **General** tab of the **Medical History** window.
- **Meds**–Displays the number of medications the patient is taking. Hover over the **Medications** area and click the link to display the **General** tab of the **Medical History** window.
- **Prescr**–Displays the number of prescriptions prescribed to the patient. An * indicates a currently prescribed prescription. Hover over the **Prescriptions** area and click the link to display the **Prescription for** list window.
- **Provider**–Displays the patient's provider. If no provider is assigned, click the link and select a provider.
- **In Acct**–Displays the number of patients on the same account as the selected patient, along with a link to a list of patients in the account.

Common Toolbar

The **Common** toolbar enables you to perform a number of common administrative procedures–the kind that you routinely do in the practice management software–in the charting module.

Instead of going back and forth between the charting module and the practice management software, you can do these functions in the charting module.

The following buttons on the **Common** toolbar are found on the **Restorative**, **Exams**, **Clinical Imaging**, and **Treatment Planning** tabs.

View Patient's Appointment for Today–Opens a window that summarizes today's appointment, including procedures and payments. You can also edit and post today's charges.

Patient Education–Enables you to set up a patient education program. Type the drive, directory, and path where the education program is located.

Start the Selected X-ray Application–Launches your x-ray capture program.

Make Appointment–Opens a window that summarizes the patient's appointment preferences, next recall date, and so forth. Click **Close** to return to the charting module.

Scheduler–Opens the **Scheduler** window. You can make, change, or cancel appointments.

Review End of Day Notes–Opens a window that enables you to add or edit an end-of-day note.

Note

If the **Review End of Day Notes** button is inactive, it can be turned on by selecting **Chart > Options > Add clinical notes at end of day**.

Email This Patient's Chart–Opens the **Email** window. Browse to select charts and images to attach to the email. Click **Close** to return to the charting module.

Show Patient's Documents and Images–Opens a list of the patient's documents and images. Click **Close** to return to the charting module.

Patient Medical History–Opens a patient's **Medical History** window. This window contains information on medications, allergies, height, weight, physician's name, and other data. Patient information can be updated here. Click **Close** to return to the charting module.

Prescription–Opens the **Prescriptions for** window. You can prescribe drugs, view current prescriptions, and refill prescriptions. Click **Close** to return to the charting module.

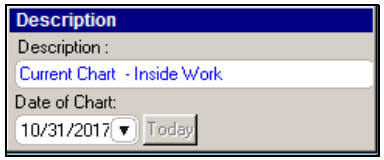
Display This Patient's Information Dialog–Opens the **Patient** window. All of the patient's basic data: address, date of birth, balances, doctor, hygienist, and so forth, are displayed. You can view patient insurance eligibility, view a list of transactions, and access SoftDent functions. Click **Close** to return to the charting module.

Display the Patient's Lab Cases–Opens the patient's **Lab cases** window. You can add, edit, or delete a lab case; and mark the case returned or complete. Click **Close** to return to the charting module.

Capture Patient Portrait–Opens the **Patient Portrait** window. You can view, import, or delete an image in this window; or modify the hardware of the camera or card. Click the **X** in the upper-right of the window to return to the charting module.

Description Toolbar

The **Description** toolbar is available on each tab. This shows today's date and enables you to view a previous date's chart.



Showing/Hiding Toolbar Titles

By default toolbars are displayed with titles. You can turn the titles off and on. To turn off toolbar titles:

1 Right-click anywhere on a toolbar. A pop-up menu is displayed.

2 Select **Show/Hide Toolbar Titles**.

Menus

The menu options duplicate the functions of buttons found on toolbars, with some exceptions.

File Menu

Click the **File** menu, and this submenu is displayed:

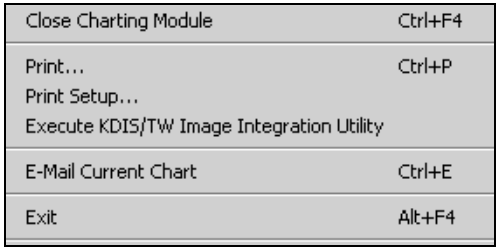
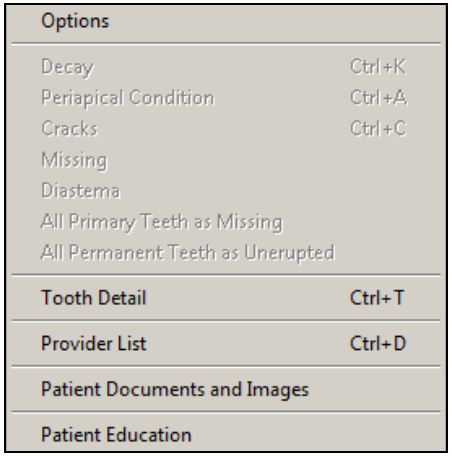
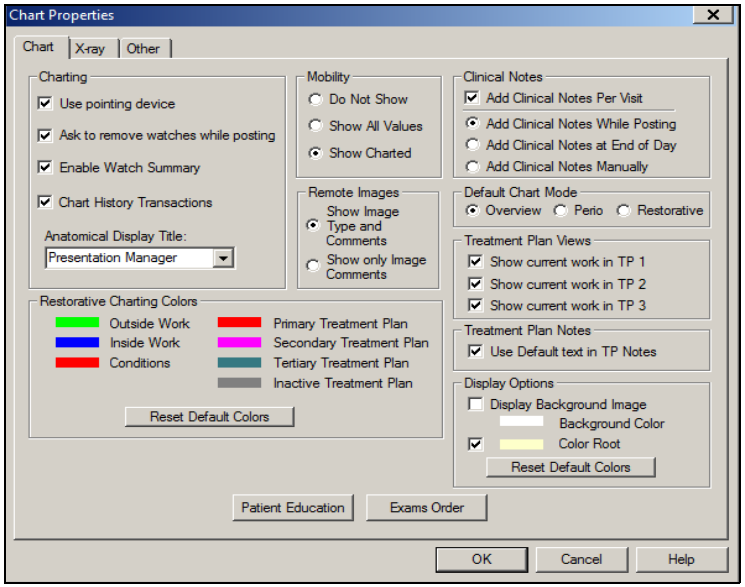


Chart Menu

Click the **Chart** menu, and this submenu is displayed:



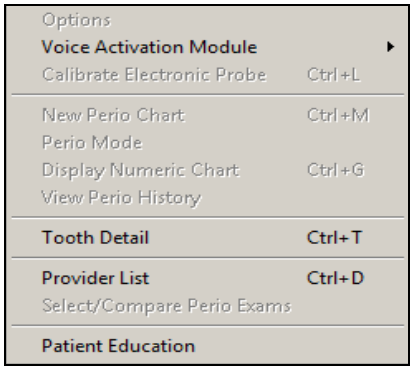
If you click the **Options** choice on the **Chart** menu, the **Chart Properties** window is displayed.



You can select the tab that opens by default when you access the charting module—**Overview** or **Perio**—in the **Default Chart Mode** section of the **Chart Properties** window.

Perio Menu

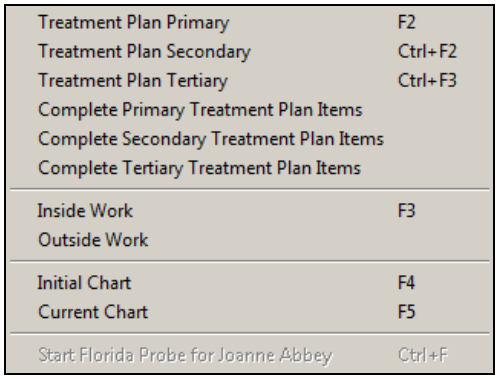
Click the **Perio** menu, and this submenu is displayed:



The **Options** command and a few perio-specific commands are enabled only when the **Perio** tab is the active window.

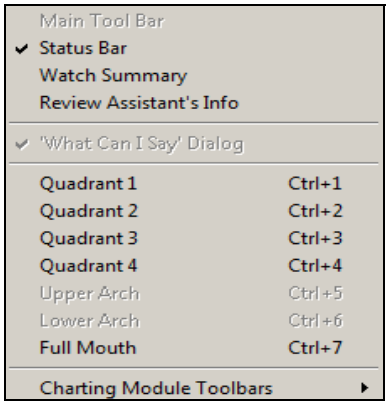
Mode Menu

Click the **Mode** menu, and this submenu is displayed:



View Menu

Click the **View** menu, and this submenu is displayed:



Select **Charting Module Toolbars**, and you can see a list of all the tab-specific toolbars. A checkmark next to a toolbar indicates that the toolbar is displayed when the appropriate tab is selected.

If you want to hide a toolbar, select **View > Charting Modules Toolbars** and deselect the toolbar you want to hide. If you want to display it again, select **View > Charting Modules Toolbars** and click the toolbar.

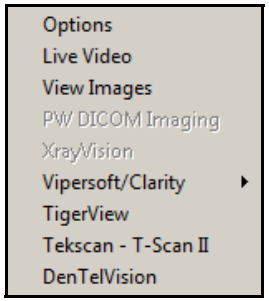
With the exception of the **Common** toolbar, each toolbar is displayed on only one of the tabs. For example, if each toolbar has a checkmark, the toolbars would be displayed in the following way:

- **Restorative** tab
  - **Common** toolbar
  - **Chart Mode** toolbar
  - **Procedure Codes** toolbar
  - **Conditions** toolbar
  - **Mobility** toolbar
- **Perio** tab
  - **Perio Views** toolbar
  - **Probe** toolbar
  - **Keypad** toolbar
  - **Perio Mobility** toolbar
  - **Plaque** toolbar
  - **Calculus** toolbar
  - **Perio Conditions** toolbar
- **Exams** tab
  - **Patient Exams** toolbar
  - **Exam Options** toolbar
  - **Common** toolbar
- **Clinical Imaging** tab
  - **Common** toolbar
  - **Clinical Imaging** toolbar
  - **Image Layout** toolbar

- **Treatment Planning** tab
  - **Common** toolbar
  - **Treatment Plan Mode** toolbar
  - **Treatment Plan** toolbar

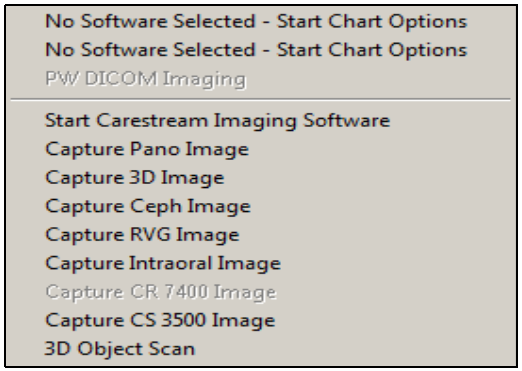
Video Menu

Click the **Video** menu, and this submenu is displayed:



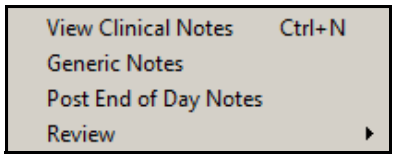
X-ray Menu

Click the **X-ray** menu, and this submenu is displayed:



Clinical Notes Menu

Click the **Clinical Notes** menu, and this submenu is displayed:

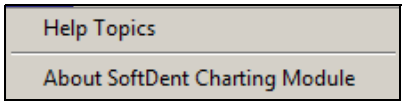


Save All Menu

Click the **Save All** menu to save any changes to the open chart.

Help Menu

Click the **Help** menu, and this submenu is displayed:



If you select **About SoftDent Charting Module**, you can see the version of the software that you are using. You will need the version number if you contact Support.

Skill Sharpeners

Exercise 1—Access a Chart from the Patient List Window

From the SoftDent practice management software, verify that a patient has a current chart.

To see if a patient has a current chart:

1 If the patient does not have an appointment today, select **List > Patient**. The **Patient List** window is displayed.

2 Find and select the patient in the list, and click **Chart**. The charting module opens. The **Clinical History** tab shows the charting activity.

Exercise 2—Expand Chart Details

Maximize a list of ledger entries and the images associated with a chart. Display the chart again with the thumbnails of the images below the chart and the expanded details associated with the chart.

To maximize the entries and display thumbnails and details:

1 Open a chart with clinical history and clinical images available. To view the clinical history list in full screen, click the **Maximize the clinical ledger view** button.

2 To view clinical images in full screen, click the **Maximize image thumbnail view** button on the main toolbar.

3 To return to the chart view with thumbnail images displayed below the chart, click the **Chart with Clinical Images** button.

Exercise 3—Determine Exam Dates

When was a patient's last perio exam?

To determine the date:

1 With the chart displayed, click the **Maximize the clinical ledger view** button. The chart is hidden, and the list of ledger entries is maximized.

2 Look through the list to view the last exam.

Exercise 4—Check Insurance Eligibility

From the charting module, find out which insurance company covers a patient and the amount of the annual dental care maximum.

To verify a patient's insurance:

1 Open a patient chart.

2 On the **Common** toolbar, click the **Display the patient's information dialog** button. The **Patient's Information** window is displayed.

3 Click **Eligibility**. The **Eligibility & Benefits** window is displayed.

4 Review the information and click **Close**. The **Patient's Information** window is displayed.

5 Click **Close**, and the charting module is displayed again.

Exercise 5—Change Options and Properties

The default tab—the tab that is open when you open the charting module—is the **Overview** tab. Make the **Perio** tab the default tab.

To change the default tab:

1 Select **Chart > Options**. The **Chart Properties** window is displayed.

2 In the **Default Chart Mode** section of the window, select **Perio**.

3 Click **OK**.

Exercise 6—Change Colors

Change the background color of the **Restorative** tab to pink.

To change the background color:

1 Select **Chart > Options**. The **Chart Properties** window is displayed.

2 In the **Display Options** section, click on the field to the left of **Background Color**. The **Color** window is displayed.

3 Click on bright pink.

4 Click **OK**. The **Chart Properties** window is displayed again.

5 Click **OK**. The **Restorative** tab is displayed again, with the pink background.

To revert to the default colors, select **Chart > Options > Reset Default Colors**.

Exercise 7—Customize Toolbars

In this exercise, add the **Patient Education** button to the **Common** toolbar.

To add the **Patient Education** button:

1 Right-click anywhere on the toolbar. A pop-up menu is displayed.

2 Select **Customize Toolbar**. The **Customize Toolbar** window is displayed.

3 Select the **Patient Education** button from the **Available toolbar buttons** section of the window, click **Add**, and click **Close**.

4 To remove the button from the toolbar, select **Customize Toolbar.** Select the button from the **Current toolbar buttons** section of the window and click **Remove**.

To rearrange the order of toolbar buttons, select the button and click **Move Up** or **Move Down** until it is in the location you want, and click **Close**.

Lesson 2

Using the Overview Tab

This lesson includes:

- Understanding the Overview Tab
- Accessing the Overview Tab
- Setting Tab Options
- Accessing Charting Tabs

Understanding the Overview Tab

The **Overview** tab gives your staff information about a patient's clinical history in one window. On the **Overview** tab, you can see:

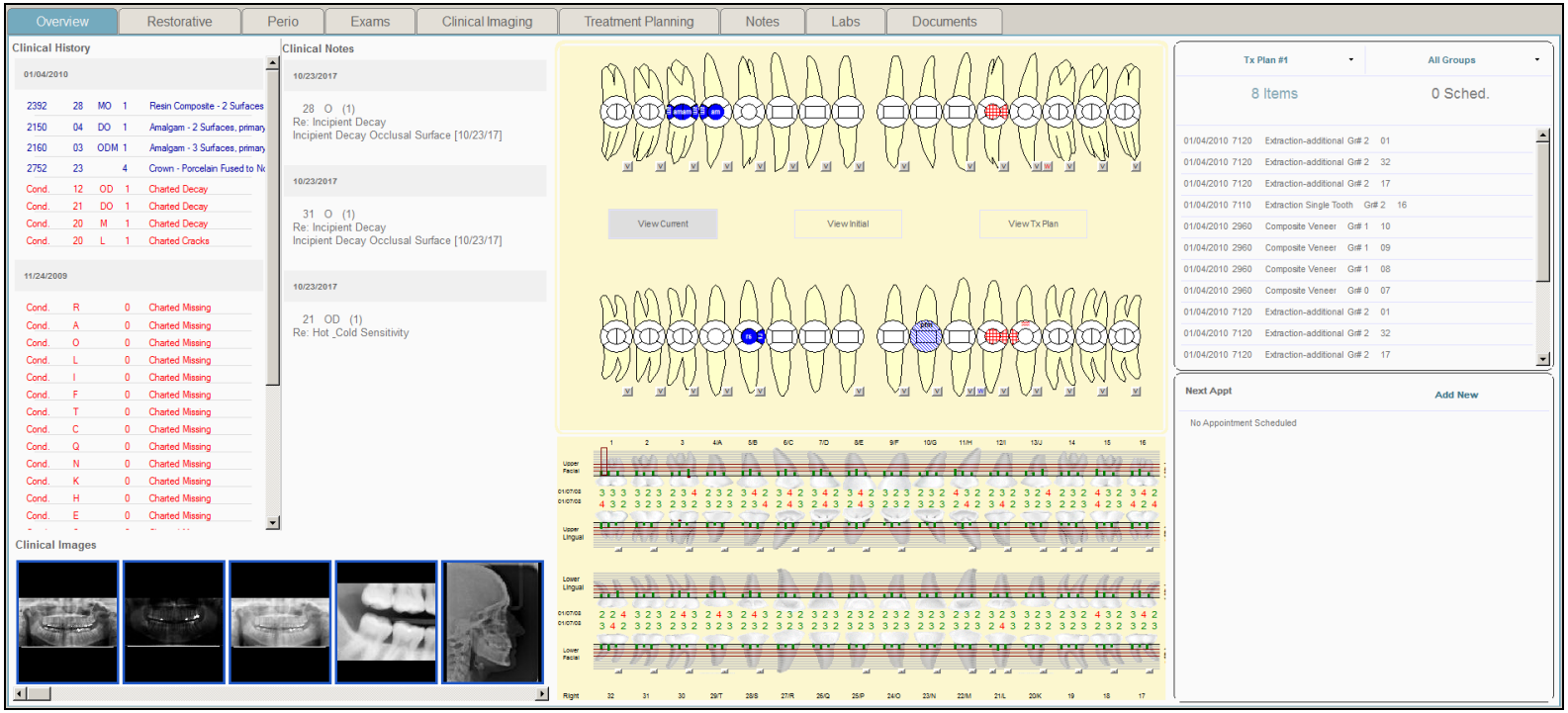
- Patient's current condition
- Treatment scheduled for the current visit
- Treatment proposed or scheduled for future visits

The tab is divided into these sections:

- **Clinical History**–Displays procedures performed and clinical conditions.
- **Clinical Notes**–Displays the date and text of clinical notes.
- **Chart**–Displays a view-only version of a patient's restorative and perio charts.
- **Clinical Images**–Displays images that have been taken of a patient.
- **Treatment Plans**–Displays:
  - Drop-down list of treatment plans
  - Drop-down list of treatment plan groups
  - Number of procedures included in a treatment plan or treatment plan group
  - Number of treatment plan procedures scheduled
  - Treatment plan creation date
  - Treatment plan modification date
  - Scrollable list of treatment plan procedures
- **Next Appointment**–Displays the time of the next appointment, a list of the next appointment's scheduled procedures, and the **Add New** button.

Accessing the Overview Tab

When you select a patient and click the **Chart** button, the **Overview** tab window is displayed.

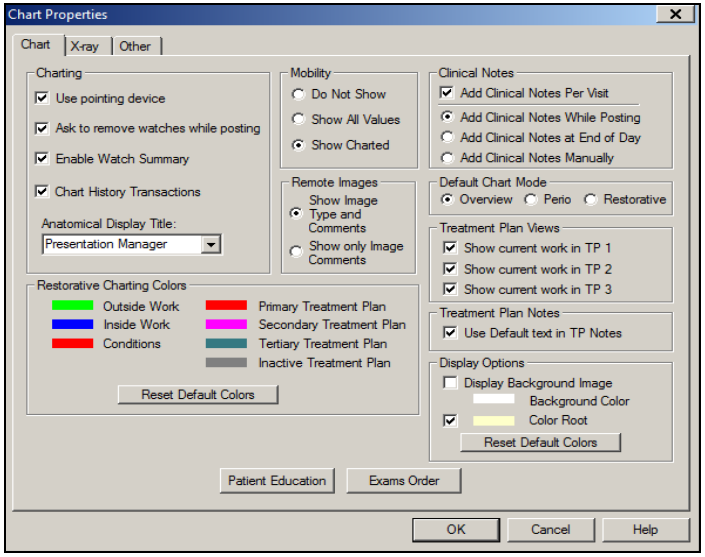


Setting Tab Options

To set tab options and properties:

1 Click the **Overview** tab.

2 On the **Chart** menu, select **Options**. The **Chart Properties** window is displayed.



3 Select your options, and click **OK**.

Accessing Charting Tabs

From the **Overview** tab, you can access these tabs:

- **Restorative**
- **Perio**
- **Exams**
- **Clinical Imaging**
- **Treatment Planning**
- **Notes**
- **Labs**
- **Documents**

Skill Sharpener

Exercise 1—Open a Patient's Chart

You want to view Joanne Abbey's chart and see what procedures have been performed.

To view a chart:

1 On the main toolbar, click the **Patient List** button. A list of all patients is displayed.

2 Select **Abbey, Joanne** from the list.

3 Click the **Chart** button. Because a watch has been placed on a tooth, the **Watch Summary** window is displayed, along with the **Overview** tab.

4 In the **Clinical History** section, you can view the procedures that have been performed.

Lesson 3

Using the Restorative Tab

This lesson includes:

- Understanding Basic Functions
- Setting Restorative Tab Options
- Accessing the Restorative Tab
- Restorative Tab Toolbars

Understanding Basic Functions

On the **Restorative** tab, you can chart:

- Restorative procedures
- Tooth conditions
- Treatment plans

When the **Restorative** tab is the active window, you can work in the following modes:

- Initial chart
- Current chart
- Treatment plan primary
- Treatment plan secondary
- Treatment plan tertiary

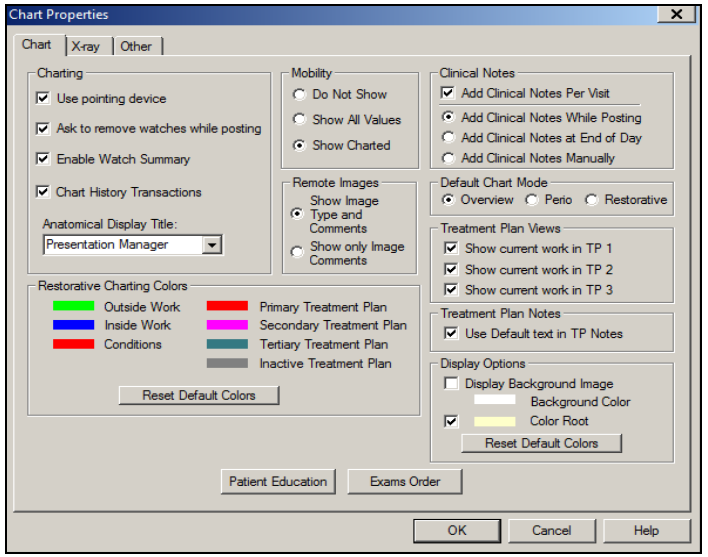
You cannot complete treatment plan items from this tab.

Setting Restorative Tab Options

To set restorative options and properties:

1 Click the **Restorative** tab. The **Restorative tab** window is displayed.

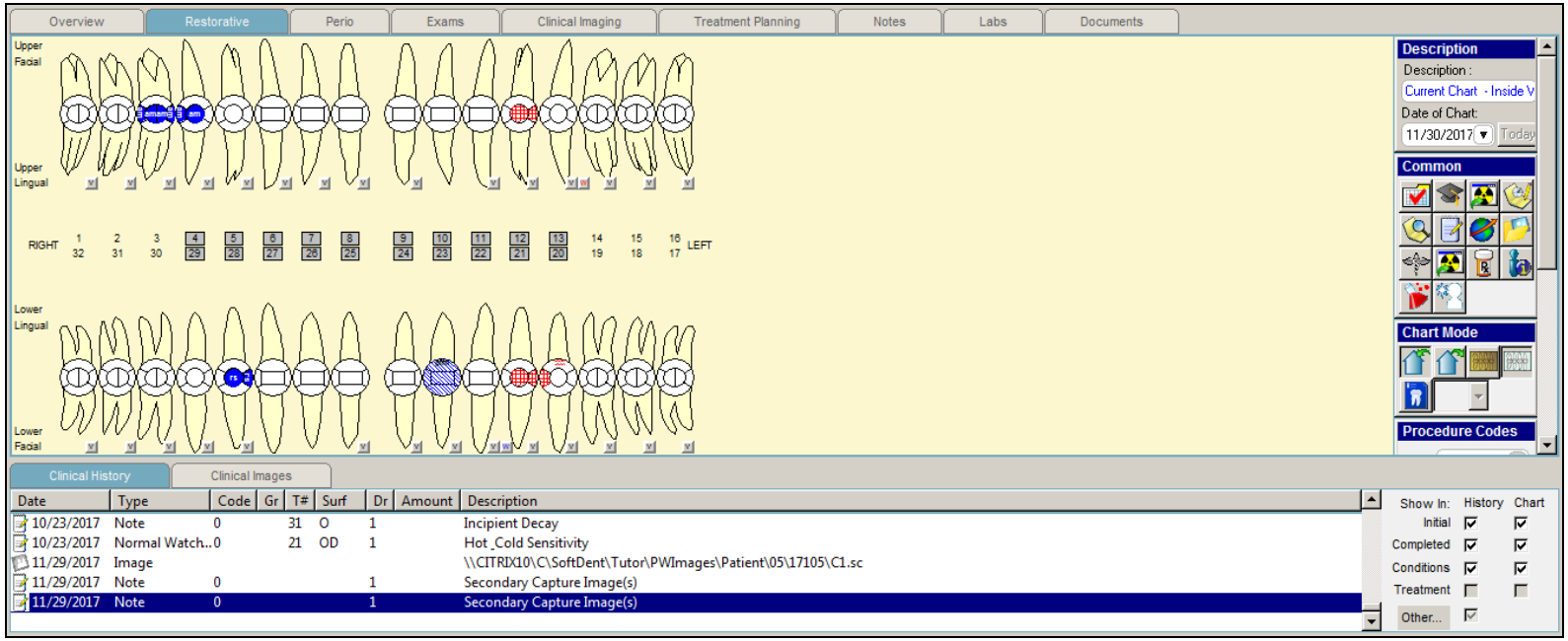
2 On the **Chart** menu, select **Options**. The **Chart Properties** window is displayed.



3 Select your options, and click **OK**.

Accessing the Restorative Tab

Click the **Restorative** tab, and the **Restorative** tab window is displayed.



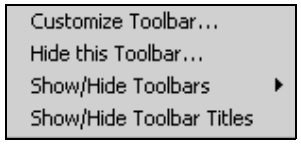
Restorative Tab Toolbars

In addition to the **Common** toolbar, these toolbars are displayed on the **Restorative** tab:

- **Chart Mode**
- **Procedure Codes**
- **Conditions**
- **Mobility**

To display or hide a toolbar:

1 Right-click on any icon on a toolbar, and a shortcut menu is displayed.



2 Select **Show/Hide Toolbars** and select the toolbar to show or hide. A check indicates a toolbar that is currently shown.

Chart Mode Toolbar

The buttons on the **Chart Mode** toolbar enable you to view the chart in different modes:

Chart work performed inside this office–Displays the chart in **Inside Work** mode. This is work that is performed in your office.

Chart work performed outside this office–Displays the chart in **Outside Work** mode. Outside work mode displays work done outside your office, such as endo or extractions performed elsewhere, or any work done before the patient came to your office.

Chart initial work–Displays the **Initial Chart**, which is made on the first examination of a patient.

Chart current work–Displays the most up-to-date charting information, or you can chart new procedures and conditions.

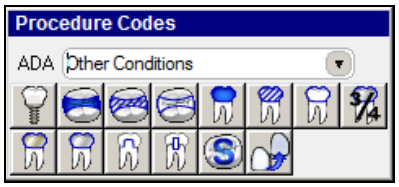
Chart treatment plan–Displays an existing treatment plan, or you can chart a new treatment plan. You can select treatment plan 1, 2, or 3.

Note

The **Chart Mode** toolbar is customizable. There are additional buttons that can be added. To customize, right-click and select **Customize**.

Procedure Codes Toolbar

The **Procedure Codes** toolbar enables you to chart procedures to be performed on one or more teeth.



The following buttons are on the **Procedure Codes** toolbar:

Implant–To indicate an implant procedure, click this button and select a tooth on the chart.

Amalgam–To indicate an amalgam procedure, click this button and select the surfaces on a tooth.

Resin–To indicate a resin procedure, click this button and select the surfaces on a tooth.

Sedative Filling–To indicate a sedative filling procedure, click this button and select the surfaces on a tooth.

Porcelain fused to Metal Crown–To indicate a porcelain fused to a metal crown procedure, click this button and select a tooth on the chart.

Resin fused to Metal Crown–To indicate a resin fused to a metal crown procedure, click this button and select a tooth on the chart.

Temporary Crown–To indicate a temporary crown procedure, click this button and select a tooth on the chart.

3/4 Metal Crown–To indicate a 3/4 metal crown procedure, click this button and select a tooth on the chart.

Full Cast Metal Crown–To indicate a full cast metal crown procedure, click this button and select a tooth on the chart.

Stainless Steel Crown–To indicate a stainless steel crown procedure, click this button and select a tooth on the chart.

Core Buildup–To indicate a core buildup procedure, click this button and select a tooth on the chart.

Post and Core–To indicate a post and core procedure, click this button and select a tooth on the chart.

Sealant–To indicate a sealant procedure, click this button and select a surface on a tooth on the chart.

Veneer–To indicate a veneer procedure, click this button and select a tooth on the chart.

Note

The **Procedure Codes** toolbar is customizable. To remove or add a button, right-click and select **Customize**.

Conditions Toolbar

The **Conditions** toolbar enables you to chart tooth conditions. Each button serves as a toggle switch: charting the same condition to a tooth a second time removes the condition from the tooth.

The following buttons are on the **Conditions** toolbar:

Chart Periapical–To chart a periapical condition, click this button and select a root tip.

Chart Cracks–To chart cracks, click this button and select a surface.

Chart Diastema–To chart diastema, click this button and select the first tooth and then the second tooth.

Chart Decay–To chart decay, click this button and select the surfaces on a tooth.

Chart Missing Teeth–To chart missing teeth, click this button and select a tooth.

Other Conditions–To chart other conditions, click this button, select another tooth condition from the list, and then select a tooth. You can also add conditions to this list.

Mobility Toolbar

The **Mobility** toolbar enables you to chart the mobility of a tooth.

- **Mobility 0**–Click the first button and select a tooth to assign mobility 0. This would typically be done to remove a previously assigned mobility.
- **Mobility 1**–Click the second button for mobility 1.
- **Mobility 2**–Click the third button for mobility 2.
- **Mobility 3**–Click the fourth button for mobility 3.

Note

The **Conditions** and **Mobility** toolbars are customizable. To remove or add a button, right-click and select **Customize**.

Skill Sharpeners

Exercise 1—Add a Watch

You can review watch information from any tab of the chart. In this exercise, add a watch to tooth number 9. The watch should say **Calculus buildup**.

To add a watch:

1. If it is not already selected, click the **Restorative** tab.
2. On the **Procedure Codes** toolbar, click the **Add a Watch for a Tooth** button, and then click tooth number **9**. The **Clinical Note** window is displayed.
3. In the **Re** field, type **Watch - Calculus buildup**.
4. The situation is not critical, so leave the **Watch Tooth** field as **Normal**.
5. Click **OK**. The chart is displayed. A **w** by a tooth on the chart indicates that there is a watch on that tooth. A blue **w** indicates a normal watch; a red **w** indicates a critical watch.
6. To ensure your patient data is not corrupted, delete the watch. To delete the watch, select **Clinical Notes > View Clinical Notes**. Select the **Watch - Calculus buildup** note from the list and click **Delete**.

Exercise 2—Use the Watch Summary

Identify the watch and determine its content:

1. Perform exercise 1 again, but do not complete step six.
2. Select **View > Watch Summary**. The **Watch Summary** window is displayed. In the **Watch Summary** window, a blue circle around a tooth number indicates a normal watch, and a red circle indicates a critical watch.
3. Close the window.
4. On the **Restorative** tab, click the **w** on the watched tooth. The **Patient Clinical Notes** window is displayed. Review the information and click **Close**.
5. To ensure your patient data is not corrupted, select **Clinical Notes > View Clinical Notes**. Select the **Watch - Calculus buildup** note from the list and click **Delete**.

Lesson 4

Using the Perio Tab

This lesson includes:

- Setting Perio Chart Options
- Accessing the Perio Chart
- Overview of the Perio Tab
- Perio Tab Toolbars
- Creating Custom Charting Paths
- Perio Menu
- Using the Voice Activation Module

Setting Perio Chart Options

You can select these perio charting options on the **Setup** tab of the **Perio Properties** window:

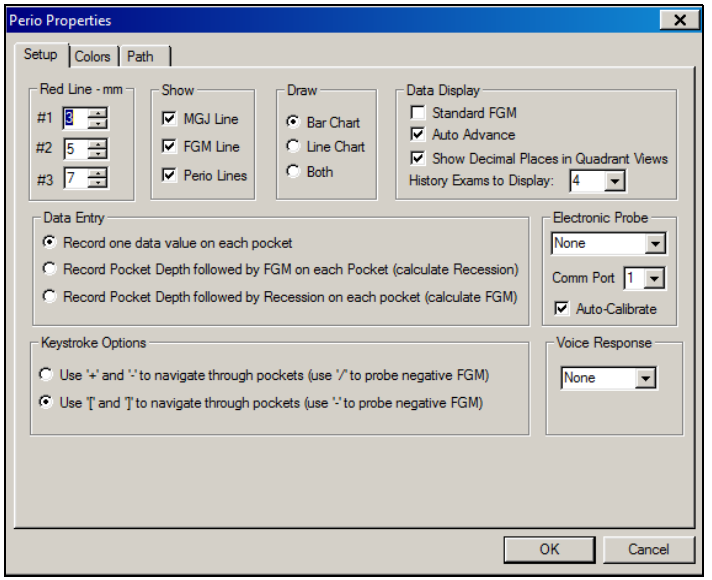
- Value in millimeters at which the red line is displayed
- Whether to display MGJ, FGM, and perio lines
- Whether to draw a bar chart, line chart, or both
- How data is displayed
- How many history exams to display
- How entered data is recorded
- Keystroke options
- Voice response information—male, female, or none

Select color options on the **Color** tab and path options on the **Path** tab of the **Perio Properties** window.

To set perio charting options and properties:

1 Click the **Perio** tab. The **Perio Chart** window is displayed.

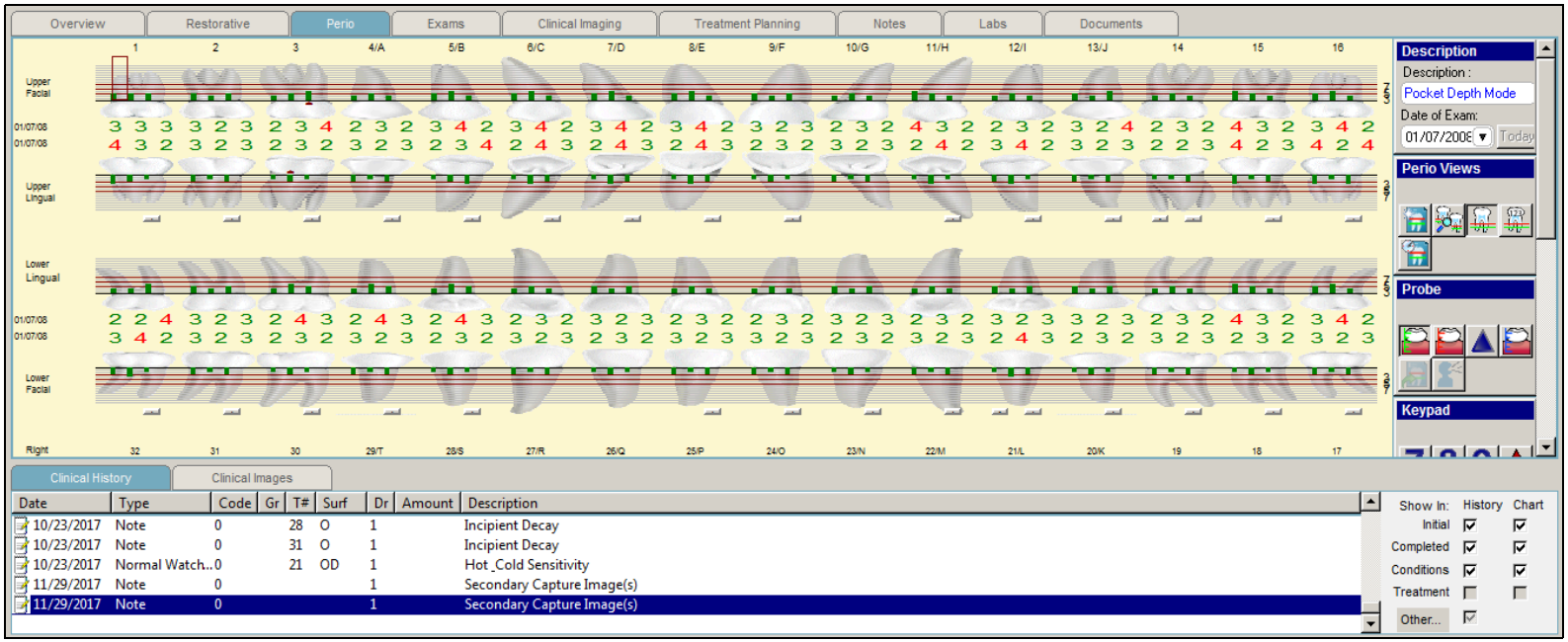
2 On the **Perio** menu, select **Options**. The **Perio Properties** window is displayed.



3 Select your options, and click **OK**.

Accessing the Perio Chart

Click the **Perio** tab, and the **Perio Chart** window is displayed.



Note

Whether you choose to show or hide the toolbar titles on the **Restorative** tab, the option you select is the default for all tabs.

Overview of the Perio Tab

The purpose of perio charting is to show the health of a patient's mouth in terms of bone loss, swollen tissue, bleeding, and so forth. To gain insurance approval for root planing and scaling procedures, you need to show that there is a loss of bone or loss of attached gingival tissue, and not just the pocket depth.

You can chart the following on the **Perio** tab:

- Pocket depth
- Mucogingival junction (MGJ)
- Free gingival margin (FGM)
- Furcation grades

You can also indicate:

- Mobility
- Plaque
- Calculus

You can view charted data in a numerical format. The measurement from the cementoenamel junction (CEJ) to where the loose edge of the gum tissue begins is called the free gingival margin (FGM).

Perio Tab Toolbars

These toolbars are typically available in the **Perio Chart** window:

- **Perio Views**
- **Probe**
- **Keypad**
- **Perio Mobility**
- **Plaque**
- **Calculus**
- **Perio Conditions**

Perio Views Toolbar

The **Perio Views** toolbar enables you to choose between different views that display periodontal conditions.

You can view the patient's chart in two ways: perio mode or perio numeric mode.

The button you select on the **Perio Views** toolbar determines the text in the **Description** field above the toolbars. For example, if you select the **Perio Mode** button, the **Description** field reads **Pocket Depth Mode**. If you select the **Perio History** button, the **Description** field reads **Perio Numeric History**.

New Perio Chart–Creates a new chart for a patient.

Select Periodontal Exams to View and Compare–Select the exam to view and compare from the drop-down lists.

Perio Mode–Displays the chart in perio mode. This is the default view when you open a new chart.

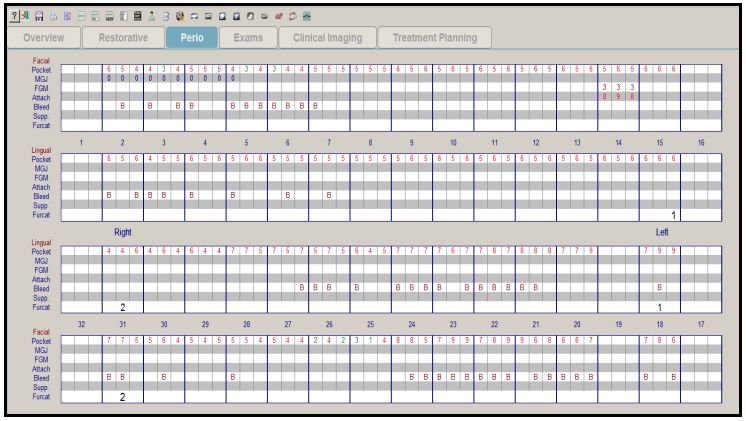
Perio Numeric Chart–Displays the chart in perio numeric mode. If you click this button, the **Description** field indicates **Numeric Perio Summary**. In perio numeric mode, you see the periodontal information in numeric format.

Note

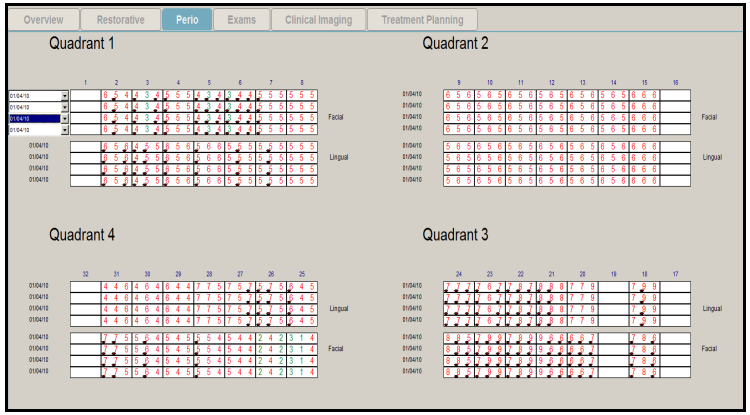
You can hide the **Perio Views** toolbar. To customize, right-click and select **Hide this Toolbar**.

Important

The SoftDent charting module does not perform any math on the MGJ measurement.



View Perio History–Displays the periodontal numeric history chart. If more than one periodontal exam has been performed, the numeric values of the charts can be compared. You can compare up to six perio exams.



Probe Toolbar

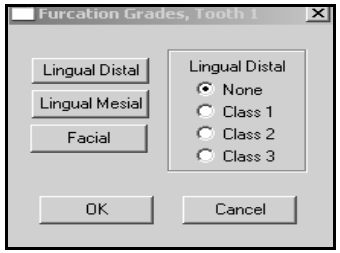
The **Probe** toolbar enables you to chart pocket depth, free gingival margin (FGM), furcation grades, and mucogingival junction (MGJ). You can also resume Perio and start and stop voice recognition software.

These buttons are on the **Probe** toolbar:

Pocket Depth–Charts pocket depth. The pocket is measured from the top of the gingiva to the sulcus. By default, this is displayed as a green line.

Free Gingival Margin–Charts FGM. The FGM is measured from the CEJ to the top edge of the gingiva. By default, this is displayed as a red line.

Furcation Grades–Charts furcation grade. The **Furcation Grades Tooth** window is displayed, and the tooth number is displayed in the title bar. Click the pocket, and select the class. Then click **OK**.



Note

Select **Perio > Options** to choose the maximum number of exams that can be viewed. This option is workstation-specific.

Note

If **Standard FGM** is not selected in the **Perio Options** window, the FGM measurement is added to the pocket depth measurement to create a third number, labeled **Attachment** on the numeric chart.

Note

You can hide the **Probe** toolbar. To customize, right-click and select **Hide this Toolbar**.

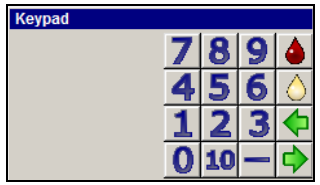
Muco-Gingival Junction–Charts MGJ. By default, this is displayed as a blue line.

Resume Perio–Resumes using the Perio feature.

Pause/Unpause Voice–Click **Voice Activation** to start or pause your voice activation software.

Keypad Toolbar

The **Keypad** toolbar enables you to chart pocket depth, blood, and suppuration; and to move to the next pocket or the previous pocket.



To chart pocket depth on the **Perio** tab:

1. On the **Perio Views** toolbar, select **New Perio Chart**. You are automatically in pocket-depth mode.
2. Select the first tooth in the appropriate quadrant or arch.
3. Click the key on the keypad that corresponds to the correct depth, or type the depth.
4. If **Resume Perio** is enabled, the next tooth is selected after you enter a value on the keypad. If it is not enabled, click **Pocket Depth** and the next tooth.
5. When you have finished charting pocket depths, click **Save All**.

To use the keypad to enter a numerical value from 10 to 15, click **10** plus **0** to **5**. For example, to indicate a depth of 10, click **10** and then click **0**.

In addition to the numeric buttons, these buttons are on the **Keypad** toolbar:

Blood–Charts bleeding.

Suppuration–Charts suppuration.

Previous Pocket–Select the previous pocket. This arrow goes in the opposite direction when on the lingual.

Next Pocket–Selects the next pocket. This arrow goes in the opposite direction when on the lingual.

Note

You can hide the **Keypad** toolbar. To customize, right-click and select **Hide this Toolbar**.

How SoftDent Charting Works on the Perio Tab

In a healthy mouth, the loose edge of the gum tissue extends beyond the CEJ to the visible part of the tooth. The bone and the PDL come right to the CEJ. Your probe would measure a pocket depth of less than 2 millimeters and an FGM value of 0. The charting module calculates an attachment level equal to the pocket depth. Insurance companies generally accept as healthy pocket depth or attachment levels of less than 3 millimeters.

If there is recession, there is bone loss. The gum tissue might be healthy and tight to the tooth, but it is below the CEJ, not on the visible part of the tooth. The perio probe is going to measure a pocket depth of less than 2, but the FGM value is the number of millimeters the edge of the tissue is from the CEJ–perhaps 3 or 4 millimeters. The charting module adds pocket depth to FGM value and calculates the attachment at 4 or 5 millimeters below the CEJ. The insurance company would then know that there is bone loss in that area.

Swollen tissue may be due to pregnancy or medication with no loss of attachment. This is sometimes called a *pseudo-pocket*. If the measurement from the CEJ to the bottom of the pocket is less than 1 millimeter, there is no bone loss.

The measurement from the CEJ to the point where the gingival tissue meets the inside lip or cheek tissue is the MGJ. This measurement is meaningless by itself; it will be a static number regardless of the patient's periodontal health. If there is severe recession, the MGJ measurement minus the pocket depth measurement indicates the attachment level. The attachment level indicates to an insurance company if there is a severe loss of attachment.

Perio Mobility Toolbar

Use the **Perio Mobility** toolbar to indicate the mobility of a tooth.

- **Mobility 0**–Select a tooth and click the first button to assign mobility 0.
- **Mobility**–Select a tooth and click the second button to assign mobility 1.
- **Mobility 2**–Select a tooth and click the third button to assign mobility 2.
- **Mobility 3**–Select a tooth and click the fourth button to assign mobility 3.

Note

To remove indications of mobility, plaque, or calculus, select **0**, and then click the tooth again.

Plaque Toolbar

Use the **Plaque** toolbar to indicate the degree of plaque associated with a tooth.

- **Plaque None**–Select a tooth and click the first button to assign **Plaque None**.
- **Plaque Low**–Select a tooth and click the second button to assign **Plaque Low**.
- **Plaque Medium**–Select a tooth and click the third button to assign **Plaque Medium**.
- **Plaque High**–Select a tooth and click the fourth button to assign **Plaque High**.

Note

You can hide the **Perio Mobility** and **Plaque** toolbars. To customize, right-click and select **Hide this Toolbar**.

Calculus Toolbar

Use the **Calculus** toolbar to indicate the amount of calculus associated with a tooth.

- **Calculus None**–Select a tooth and click the first button to assign **Calculus None**.
- **Calculus Low**–Select a tooth and click the second button to assign **Calculus Low**.
- **Calculus Medium**–Select a tooth and click the third button to assign **Calculus Medium**.
- **Calculus High**–Select a tooth and click the fourth button to assign **Calculus High**.

Perio Conditions Toolbar

Use the **Perio Conditions** toolbar to chart periapical conditions and missing teeth.

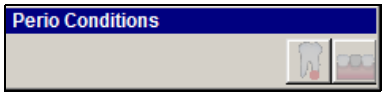


Chart periapical condition–Charts a periapical condition.

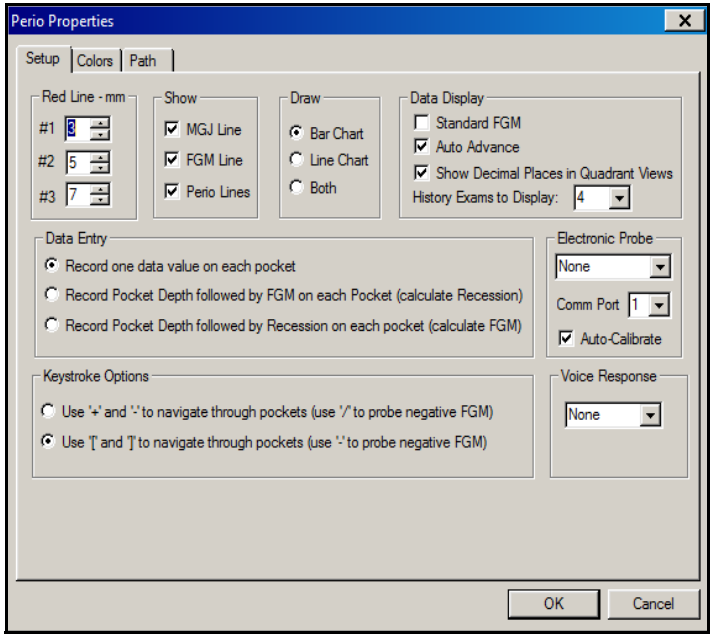
Chart missing teeth–Indicates that a tooth is missing.

Creating Custom Charting Paths

You can create up to three different customized charting paths. Paths are workstation-specific.

To create a user-defined charting path:

1 In the **Perio Chart** window, select **Perio > Options**. The **Perio Properties** window is displayed.



2 Click the **Path** tab. The **Perio Properties Path** tab is displayed.

Note

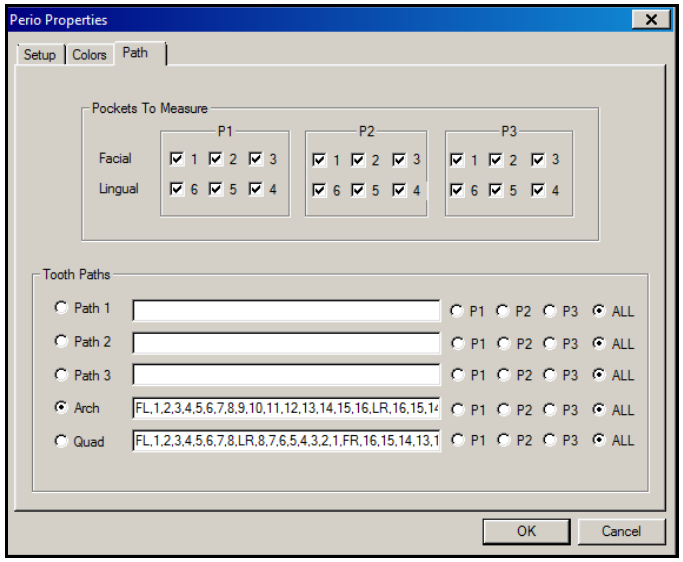
The degree of tooth mobility, plaque, and calculus does not display graphically, but are noted beneath the tooth.

Note

You can hide the **Perio Conditions** and **Calculus** toolbars. To customize, right-click and select **Hide this Toolbar**.

Note

A path is the route the computer takes.



3 In the **Pockets to Measure** section, select the pockets. For example, to chart pockets 2, 3, and 5, deselect pockets **1**, **4**, and **6**.

4 In the **Tooth Paths** section, type the path and select the pocket. When you type the path, you must indicate the path surface and side information. Use commas to separate. You can use the following information:

- **FL**–The path starts on the facial surface and moves toward the left side of the mouth.
- **FR**–The path starts on the facial surface and moves toward the right side of the mouth.
- **LL**–The path starts on the lingual surface and moves toward the left side of the mouth.
- **LR**–The path starts on the lingual surface and moves toward the right side of the mouth.

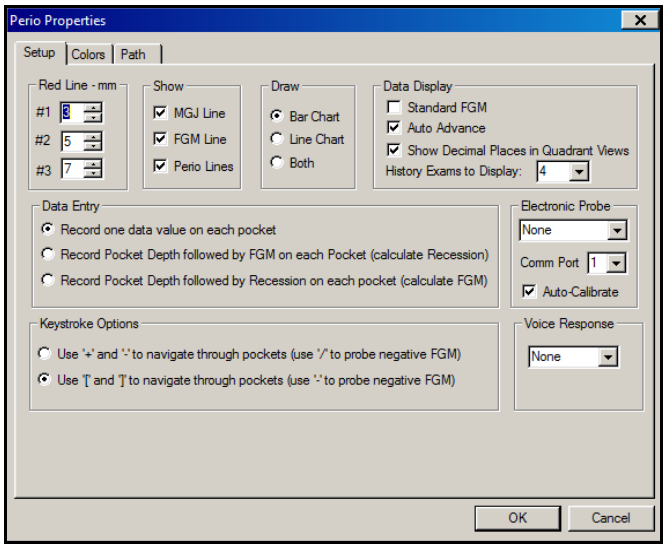
5 Click **OK**.

Using Auto Advance for Charting

When using Auto Advance, the default charting path is used.

To use Auto Advance:

1 In the **Chart for** window, select **Perio > Options**. The **Perio Properties** window is displayed.



2 In the **Data Display** section, select the **Auto Advance** option.

When charting by arch, the default Auto Advance path begins with the distal facial surface of #1 and continues on the facial to the distal facial surface of #16, then moves to the distal lingual of #16 and continues on the lingual to the distal lingual of #1, then moves to the distal lingual of #17 and continues on the lingual to the distal lingual of #32.

When charting by quadrant, the default Auto Advance begins at the facial surface of tooth #1 and continues on the facial to the mesial facial of tooth #8, then goes to the mesial lingual of tooth #8, and continues on the lingual to tooth #1, then goes

Note

You can chart by arch or quadrant.

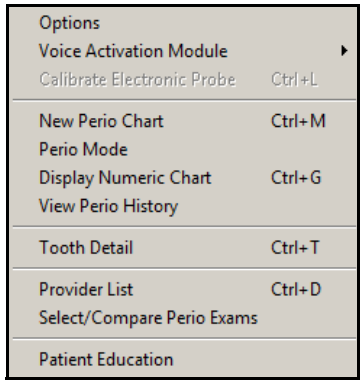
to the distal facial of tooth #16 and continues on the facial to the mesial facial of tooth #9, then moves to the mesial lingual of tooth #9 and continues on the lingual to the distal lingual of tooth #16. Then it drops down to the distal facial of tooth #17 and continues on the facial to the mesial facial of tooth #24, then to the mesial lingual of tooth #24 and continues on the lingual to the distal lingual of tooth #17, then moves to the distal facial of tooth #32 and continues on the facial to the mesial facial of tooth #25 and continues on the lingual to the distal lingual of tooth #32.

3 Click **OK**.

When using Auto Advance for periodontal charting, the advance feature is temporarily paused when you move to another pocket. This feature is enabled only when you use a probe to chart pocket depth. To return to the pocket and tooth in the normal auto sequence, click **Resume Perio** on the **Probe** toolbar.

Perio Menu

Most options available on the **Perio** menu can also be accessed from the toolbars.



Some options on the **Perio** menu, however, are not available on the toolbars. Select a tooth and select **Perio > Tooth Detail**, and the **Posted Work Performed for Tooth** window is displayed. All work posted for the tooth is displayed.

Click **Patient Education**, and the **Patient Education Setup** window is displayed. This window enables you to run a patient education program from the charting module.

Using the Voice Activation Module

The voice activation module enables you to perform perio charting using voice commands instead of the keyboard or mouse. You must have the appropriate license and a compatible sound card and microphone installed.

For voice activation training, the individual user needs to have his or her own Microsoft Windows login for the workstation on which training occurs. This login is distinct from the SoftDent login.

Activating Voice Recognition

To activate the voice activation module:

1 Obtain an activation code from your SoftDent Support or Sales representative.

2 Select **Help > About SoftDent Software**.

3 Select **Enter Activation Code**.

4 Type the code in the field and click **OK**.

Note

You must install the voice recognition software on each computer on which voice commands will be used.

Important

If the user trains only under the SoftDent login, the next person who trains on that workstation overrides the training of the first user.

Installing the Voice Activation Module

To install the voice activation module:

1. Open the SoftDent software on a workstation.
2. Open a patient's chart.
3. Click **Perio** in the charting menu bar, and select **Voice Recognition Module**.
4. Select **Voice Activation Module Options**.
5. Select **Enabled Using SAPI Version 5** from the drop-down menu and click **OK**.

Testing Microphone/Headset Levels

To test the levels:

1. On the desktop click **Start** and then **Run**.
2. Type **sndrc32**.
3. Click **OK**.
4. Click the **Record** icon and attempt to record audio.

Setting Microphone/Headset Levels

To set the levels:

1. Open the **Control Panel** in Windows.
2. Click **Ease of Use** and select **Speech Recognition**.
3. Click **Setup Microphone**.
4. Follow the prompts.

Training the Voice Activation Module

Because your office has various noise and audio levels throughout the day, training the module in multiple situations—such as low-level, mid-level, high-level noise; with mask, without mask; and so on—enables speech recognition to adjust to the average audio and noise levels in the office.

To train the voice activation module:

1. Open the **Control Panel** in Windows.
2. Click **Ease of Access**, and select **Speech Recognition**.
3. Click **Train your computer to better understand you**.
4. Follow the prompts.
5. Repeat these steps at least three times when various audio levels exist within the office.

See "Using Voice Recognition Commands" on page 31 for a list of commands.

Tip

It is recommended that you use a noise-canceling headset that uses an analog interface through a SAPI compatible sound card on your PC.

Using Voice Recognition Commands

To access the commands, select **Perio > Voice Activation Module > Show 'What Can I Say' Dialog**. When using voice activation module commands, speak clearly and make sure the microphone is close to your mouth.

The commands for the voice activation module are:

Command	Command	Command	Command	Command
1	2	3	4	5
6	7	8	9	10
11	12	Add A Note	Bleeding	Blood
Calculus High	Calculus Low	Calculus Moderate	Calculus None	Capture Images
Case Presentations	Chart FGM	Chart MGJ	Chart Pocket Depth	Clinical Notes List
Clinical Notes Review	Close Chart	Close SoftDent	Generic Clinical Notes List	Mobility 0
Mobility 1	Mobility 2	Mobility 3	Modify Patient Exams	Move Down
Move Up	New Perio Chart	Next	Pause Voice Recognition	Perio Chart
Perio Numeric Chart	Perio Numeric History	Perio Screening	Plaque High	Plaque Low
Plaque Moderate	Plaque None	Previous	Print	Resume
Save Perio Data	Show Detail	Start Secondary X-Ray Software	Start X-Ray Software	Suppuration
Tooth Number (1-32)	Treatment Plan	View Patient Exams	View Quadrant 1	View Quadrant 2
View Quadrant 3	View Quadrant 4	Wake Up	What can I say?	

Skill Sharpeners

Exercise 1—Chart a Pocket

On the perio chart, indicate that a pocket on tooth 4 now has a depth of 2.

To mark the depth of a pocket on a tooth:

1 In the **Chart for** window, click the **Perio** tab.

2 On the **Perio Views** toolbar, click **New Perio Chart**.

3 On the **Probe** toolbar, click **Pocket Depth**.

4 Click tooth **#4**, and type–or select from the keypad–**2**.

5 Click **Close** to exit the chart without saving the change.

Exercise 2—Chart a Condition

Chart a periapical condition to tooth 5. Remove the periapical condition from tooth 5.

To chart and then remove a periapical condition on tooth 5:

1 On the **Perio Conditions** toolbar, click the **Chart periapical condition** button.

2 Select the root of the tooth you want it charted on, such as lingual or buccal.

3 Click it again to remove the condition.

Lesson 5

Using the Exams Tab

This lesson includes:

- Setting the Default Exams Sequence
- Accessing the Exams Tab
- Using Exams Toolbars
- Using the Exams Tab

Using the charting module, you can chart soft tissue, periodontal tissue, occlusal, TMJ, and PSR exams. You can save dated exam histories for each type of exam, so you can show the progress for each patient. You can also view the patient exam summary and print exam data with the chart.

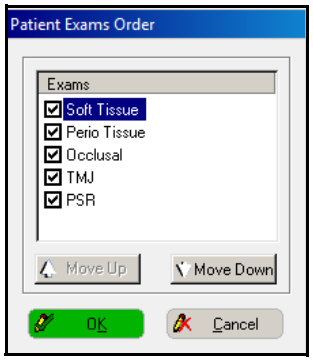
Setting the Default Exams Sequence

You can specify a default exam for charting the periodontal tissue, occlusal, soft tissue, PSR, and TMJ exams.

To set the default exam sequence:

1 Select **Chart > Options**. The **Chart Options Properties** window is displayed.

2 Click **Exams Order**. The **Patient Exams Order** window is displayed.



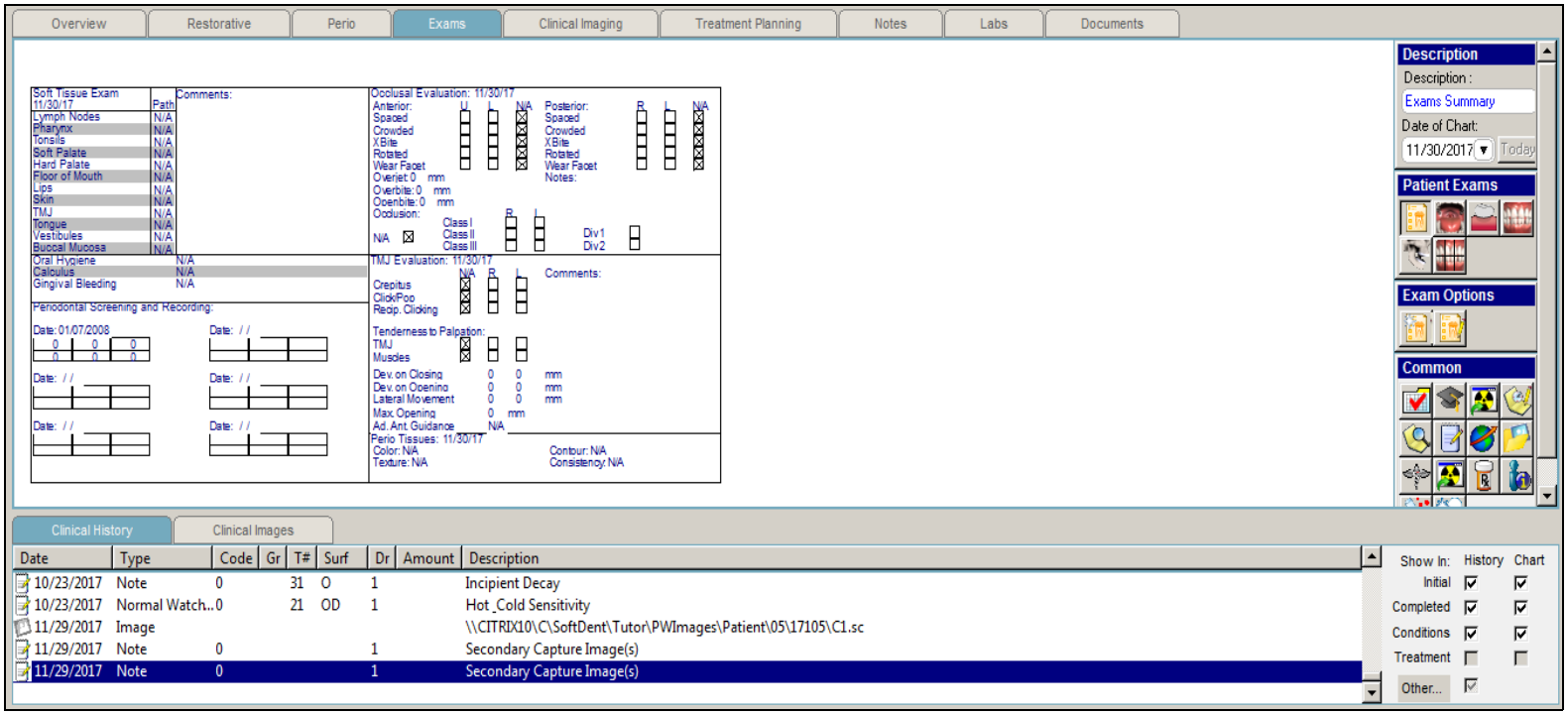
3 Select an option and use the buttons to change the order of the exams.

4 Deselect any exams that you do not perform.

5 Click **OK**.

Accessing the Exams Tab

Click the **Exams** tab, and the **Patient Exam Summary** window is displayed.



Using Exams Toolbars

These toolbars can be displayed on the **Exams** tab:

- **Patient Exams**
- **Exam Options**
- **Common**

You can hide or display toolbars, by selecting **View > Charting Module Toolbars** and selecting or deselecting the toolbars you want.

Patient Exams Toolbar

The **Patient Exams** toolbar enables you to display a soft tissue, periodontal tissue, occlusal, TMJ, or PSR exam.

These buttons are on the **Patient Exams** toolbar:

Exams Summary–Displays the exam summary.

Soft Tissue Exam–Displays a soft tissue exam. You can chart oral hygiene, gingival bleeding, calculus, and the condition of all soft tissues, as well as enter comments.

Perio Tissue Exam–Displays a perio tissue exam. You can chart tissue color, texture, contour, and consistency.

Occlusal Exam–Displays an occlusal exam. You can chart conditions such as crowding, rotation, spacing, overjet, overbite, open bite, wear facet, and class.

TMJ Exam–Displays a TMJ exam. You can chart such conditions as crepitus, clicking/popping, reciprocal clicking, and tenderness to palpation: TMJ and muscles. You can also record deviations in opening and closing, lateral movement, maximum opening, and adequate anterior guidance.

Perio Screening Exam–Displays a perio screen exam. You can chart periodontal health and create a note for each sextant.

Exam Options Toolbar

The **Exam Options** toolbar enables you to display a new exam or edit an existing exam.

These buttons are on the **Exams Options** toolbar:

New Exam–Displays a new exam.

Edit Exam–Enables you to edit an existing exam.

Common Toolbar

The functions of the **Common** toolbar are the same as on the other tabs.

Note

You can hide the **Patient Exams** and **Exam Options** toolbars. To customize, right-click and select **Hide this Toolbar**.

Using the Exams Tab

You can perform the following exams on the **Exams** tab. On any of the exam windows, **NA** means Not Assessed.

Performing Soft Tissue Exams

To perform a soft tissue exam:

1 On the **Patient Exams** toolbar, click **Soft Tissue Exam**. The most recent soft tissue exam for the patient is displayed. The exam date is at the top of the tab.

2 Select an option:

- If no exam exists for the patient, click **New Exam** on the **Exam Options** toolbar.
- To edit an existing exam, click **Edit Exam** on the **Exam Options** toolbar.

3 Select an option:

- If you have assessed everything and there is no indication of soft tissue pathology, there is excellent oral hygiene, no calculus, and no gingival bleeding, click **All OK**.
- Select the appropriate checkbox to indicate soft tissue information in the **Soft Tissue** section.
- Indicate the oral hygiene level in the **Oral Hygiene** section.
- Indicate the calculus level in the **Calculus** section.
- Indicate the amount of gingival bleeding in the **Gingival Bleeding** section.

4 Type any notes in the **Comments** section.

5 Click **Save Exam**.

Performing Periodontal Tissue Exams

To perform a periodontal tissue exam:

1 On the **Patient Exams** toolbar, click **Perio Tissue Exam**.

2 Select an option:

- If no exam exists for the patient, click **New Exam** on the **Exam Options** toolbar.
- To edit the existing exam, click **Edit Exam** on the **Exam Options** toolbar.
- To create a new exam for the patient, click **New Exam** on the **Exam Options** toolbar.

3 Select an option:

- If you have assessed everything and there is no indication of a change in color, contour, texture, or consistency, click **All OK**.
- Select the tissue color in the **Color** section.
- Select the tissue contour in the **Contour** section.
- Select the tissue texture in the **Texture** section.
- Select the tissue consistency in the **Consistency** section.

4 Click **Save Exam**.

5 To display the next exam, click **Next Exam**.

Performing Occlusal Exams

To perform an occlusal exam:

1 On the **Patient Exams** toolbar, click **Occlusal Exam**.

2 Select an option:

- If no exam exists for the patient, click **New Exam** on the **Exam Options** toolbar.
- To edit the existing exam, click **Edit Exam** on the **Exam Options** toolbar.
- To create a new exam for the patient, click **New Exam** on the **Exam Options** toolbar.

3 Select an option:

- If you have assessed everything and there is no indication of a change in the occlusal conditions, click **All OK**.
- Select the anterior teeth condition in the **Anterior Teeth** section.
- Select the posterior teeth condition in the **Posterior Teeth** section.
- Type the overjet amount in the **Horizontal (Overjet)** field. You can use the numerical keypad to enter information in this field.
- Type the overbite amount in the **Vertical (Overbite)** section. You can use the numerical keypad to enter information in this field.
- Type the open bite amount in the **Open Bite** field. You can use the numerical keypad to enter information in this field.
- Select the occlusal class in the **Occlusal** section.

4 Click **Save Exam**.

5 To display the next exam, click **Next Exam**.

Performing TMJ Exams

To perform a TMJ exam:

1 On the **Exams** tab in the **Charting for** window, click **TMJ Exam** on the **Patient Exams** toolbar. If no TMJ exam exists for the patient, skip to step 3.

2 Select an option:

- To create a new exam, click **New Exam** on the **Exam Options** toolbar.
- To edit the existing exam, click **Edit Exam** on the **Exam Options** toolbar.

3 Select an option:

- To indicate there are no TMJ conditions, click **All OK**.
- Select the TMJ conditions from the top of the tab.

4 Select the tenderness to palpation in the **Tenderness to palpation** section.

5 Select the anterior guidance in the **Adequate Anterior Guidance** section.

6 Type the deviation on closing in the **Deviation on Closing** field. You can use the numerical keypad to enter information in this field.

7 Type the deviation on opening in the **Deviation on Opening** field. You can use the numerical keypad to enter information in this field.

8 Type the lateral movement in the first **Lateral Movement** field. You can use the numerical keypad to enter information in this field.

9 Type the maximum opening in the first **Maximum Opening** field. You can use the numerical keypad to enter information in this field.

10 Click **Save Exam**.

11 To display the next exam, click **Next Exam**.

Performing PSR Exams

To perform a PSR exam:

1 On the **Exams** tab in the **Charting for** window, click **Perio Screening Exam** on the **Patient Exams** toolbar. If no PSR exam exists for the patient, skip to step 3.

2 Select an option:

- To create a new exam, click **New Exam** on the **Exam Options** toolbar.
- To edit the existing exam, click **Edit Exam** on the **Exam Options** toolbar.

3 Select an option:

- To indicate the colored area of the probe remains visible in the deepest crevice of the sextant, select **0** from the appropriate sextant drop-down list.
- To indicate bleeding after probing, select **1** from the appropriate sextant drop-down list.
- To indicate supragingival or subgingival calculus or defective margins, select **2** from the appropriate sextant drop-down list.
- To indicate the colored area of the probe remains partly visible in the deepest crevice of the sextant, select **3** from the appropriate sextant drop-down list.
- To indicate a probing depth greater than 5.5 mm, select **4** from the appropriate sextant drop-down list.
- To add a note to a sextant, click the appropriate S # and **Note** button. Then type the note in the field beneath the buttons.

4 Click **Save Exam**.

5 To display the next exam, click **Next Exam**.

Skill Sharpeners

Exercise 1—Perform a Soft Tissue Exam

To perform a soft tissue exam:

1 Open a patient's chart.

2 On the **Patient Exams** toolbar, click **Soft Tissue Exam**. The most recent soft tissue exam for the patient is displayed.

3 Click **New Exam** on the **Exam Options** toolbar.

4 Indicate soft tissue information in the **Soft Tissue** section.

5 Indicate the oral hygiene level in the **Oral Hygiene** section.

6 Indicate the calculus level in the **Calculus** section.

7 Indicate the amount of gingival bleeding in the **Gingival Bleeding** section.

8 Type any notes in the **Comments** section.

9 Click **Save Exam**.

Exercise 2—Edit a Periodontal Tissue Exam

To edit a periodontal tissue exam:

1 Open the chart of a patient who has had a periodontal tissue exam.

2 On the **Patient Exams** toolbar, click **Perio Tissue Exam**.

3 Click **Edit Exam** on the **Exam Options** toolbar.

4 If appropriate, change:

- Tissue color in the **Color** section.
- Tissue contour in the **Contour** section.
- Tissue texture in the **Texture** section.
- Tissue consistency in the **Consistency** section.

5 Click **Save Exam**.

Exercise 3—Perform an Occlusal Exam

To perform an occlusal exam:

1 Open a patient's chart.

2 On the **Patient Exams** toolbar, click **Occlusal Exam**.

3 Click **New Exam** on the **Exam Options** toolbar.

4 Click **All OK**.

5 Click **Save Exam**.

Lesson 6

Using the Clinical Imaging Tab

This lesson includes:

- Setting Video Capture Options
- Accessing the Clinical Imaging Tab
- Using the Clinical Imaging Toolbars
- Using the Clinical Imaging Tab

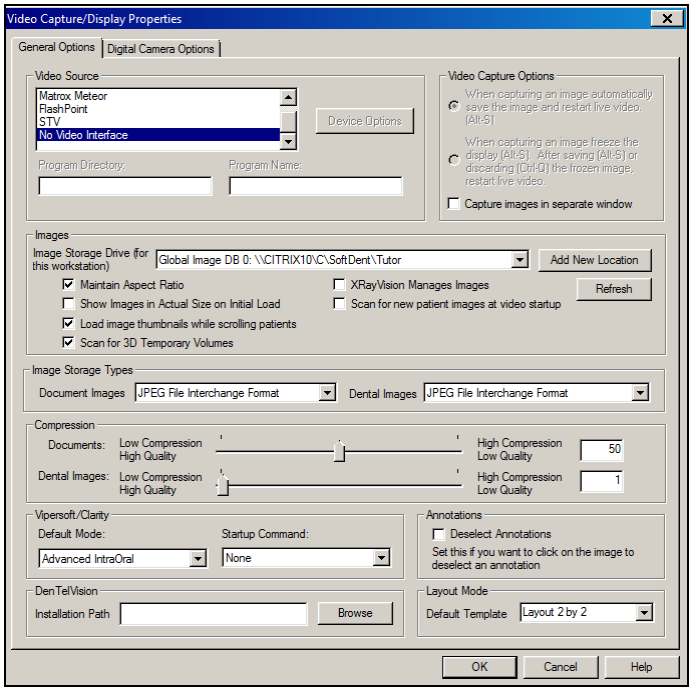
Setting Video Capture Options

You can acquire color images from digital cameras, scanners, intraoral cameras, or from a file on disk. Before you can capture images, you must:

- Install a video board, any related software, and–optionally–a foot pedal.
- Make sure your destination drive has sufficient free space to store your large video files.
- Set the video capture options.

To set video capture options:

1 From any tab of the **Chart for** window, select **Video > Options**. The **Video Capture/Display Properties** window is displayed.



2 In the **Video Source** section, select the video card to use when receiving live video.

3 Click **Device Options**, and set the options for the device. The options vary, depending on which device you select.

Note

If you use the 1000 intraoral video camera, version USB 2, to capture images, in the **Video Source** section, select **No Video Interface**. Then use the dental imaging system to operate the camera.

4 Select from these options:

- **When capturing an image, automatically save the image and restart live video**.
- **When capturing an image, freeze the display. After saving or discarding the frozen image, restart live video**.
- **Capture images in separate window**.

5 Click the **Image Storage Drive (for this workstation)**, and select the path for the drive that stores the images.

6 Select from these options:

- To display images with the appropriate relationship between height and width, select **Maintain Aspect Ratio**.
- To display the image in actual size when it is initially loaded, select **Show Images in Actual Size on Initial Load**. This option is available only if **Maintain Aspect Ratio** was selected.
- To display thumbnail images when scrolling through patient records, select **Load image thumbnails while scrolling patients**.
- To have the software monitor a patient's image storage drive for temporary 3D volume folders, select **Scan for 3D Temporary Volumes**.
- If you are using XRay Vision software to control the location of images on the hard drive, select **XRay Vision Manages Images**.
- To enable the video capturing application to look for new images on the image storage drive among all networked computers when it is launched, select **Scan for new patient images at video startup**.

7 Click the **Document Images** drop-down list, and select the default storage type for your document images.

8 Click the **Dental Images** drop-down list, and select the default storage type for your dental images.

9 In the **Compression** section, drag the slider to the correct compression level for documents and images. Image files are compressed to save space on the hard drive. The greater the compression, the lower the quality of the image.

10 If you are using ViperSoft software, select the default mode and startup command from the appropriate drop-down lists.

11 If you want to be able to click an image and deselect an annotation, leave **Deselect Annotations** checked. This option is selected by default.

12 If you are using DenTelVision, type the installation path in the **Installation Path** field. You can also click **Browse** to search for and select a path.

13 Click the **Default Template** drop-down list, and select the default template to use when **Layout** mode is displayed on the **Clinical Imaging** tab.

14 To set digital camera options, click the **Digital Camera Options** tab. The **Digital Camera Options** window is displayed.

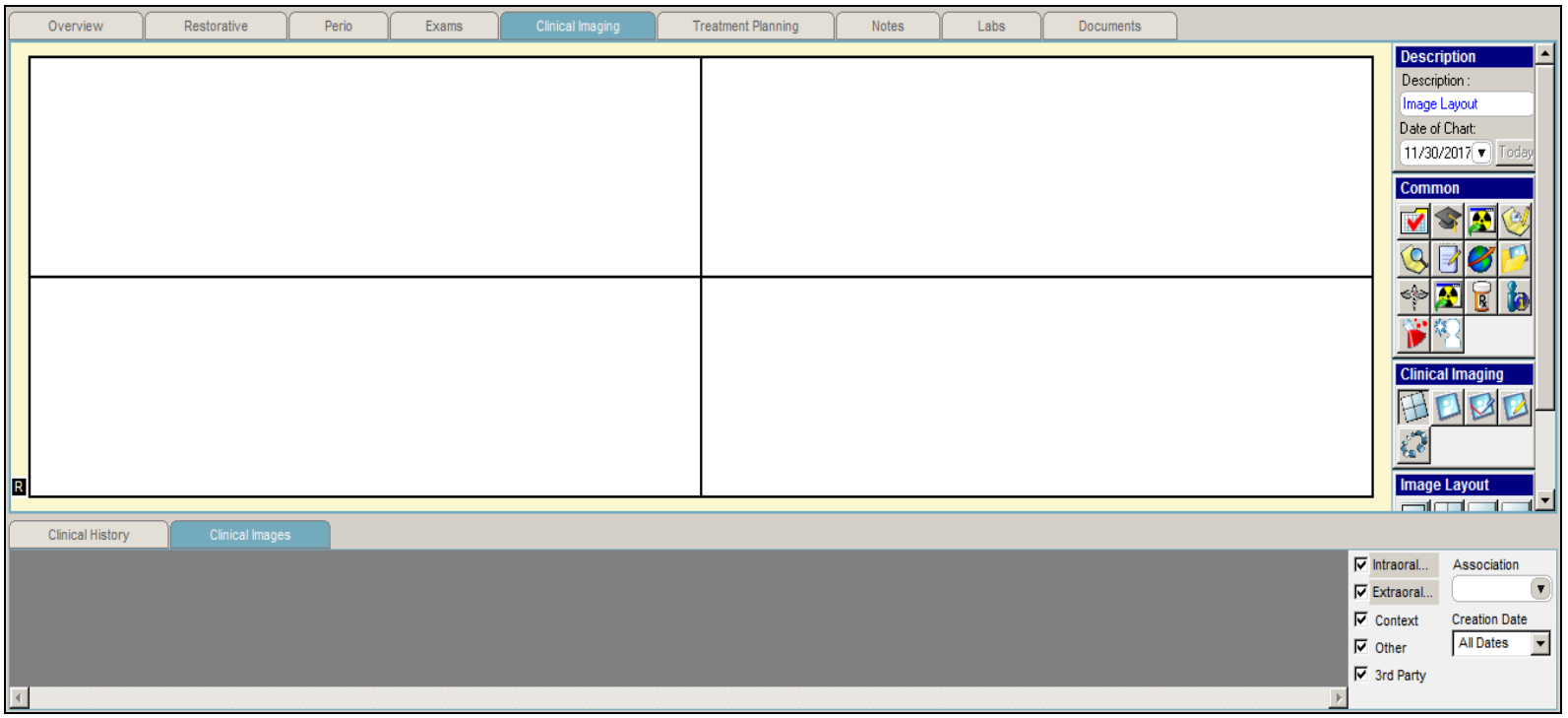
15 In the **Digital Camera Import Directory** field, type the directory from which to import digital camera images. You can also click **Browse** to search for and select a path.

16 To delete images from the camera after importing them, select **Delete selected images from camera after importing**.

17 Click **OK**.

Accessing the Clinical Imaging Tab

Click the **Clinical Imaging** tab, and the **Image Layout** window is displayed.



The appearance of the window depends on the default template you selected on the **Video Capture/Display Properties** window. The **Layout 2 by 2** is shown here. To move images to the layout, drag the images.

Using the Clinical Imaging Toolbars

These toolbars are displayed on the **Clinical Imaging** tab:

- **Common**
- **Clinical Imaging**
- **Layout**

Other toolbars are displayed as different display modes are selected.

Common Toolbar

The functions of the **Common** toolbar are the same as on the other tabs.

Clinical Imaging Toolbar

The **Clinical Imaging** toolbar enables you to display the **Clinical Imaging** tab in several modes:

These buttons are on the **Clinical Imaging** toolbar:

Layout Mode–Displays the window in layout mode and displays the **Image Layout** toolbar.

Capture Mode–Displays the window in capture mode and displays the **Image Capture** toolbar.

Annotate Mode–Displays the window in annotate mode and displays the **Image Annotate** toolbar.

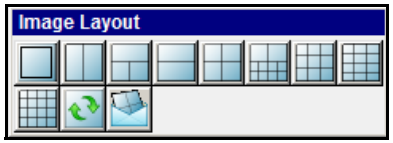
Edit Mode–Displays the window in edit mode and displays the **Image Editor** toolbar.

Organization Mode–Displays the window in organization mode and enables you to associate images with teeth.

If you have Carestream Dental Imaging software, when an image is selected and **Annotate Mode** or **Edit Mode** is selected, the Dental Imaging software is launched.

Image Layout Toolbar

The **Image Layout** toolbar enables you to select a view in which to display images. This toolbar is displayed only when the **Clinical Imaging** tab is in **Layout Mode**.



These buttons are on the **Image Layout** toolbar:

Layout View 1 by 1–Displays one image.

Layout View 1 by 2–Displays two images side by side.

Note

Select an image from the **Clinical Image** tab at the bottom of the window and drag it to the layout. 3D images cannot be displayed in this manner.

Note

You can hide the **Clinical Imaging** and **Image Layout** toolbars. To customize, right-click and select **Hide this Toolbar**.

Layout View 1 over 2–Displays one image above two images.

Layout View 2 by 1–Displays one image above another image.

Layout View 2 by 2–Displays four images, two on top and two on bottom.

Layout View 2 by 8–Displays two images above eight images.

Layout View 3 by 3–Displays nine images, three in each row.

Layout View 4 by 3–Displays twelve images in three columns of four images each.

Layout View 4 by 4–Displays sixteen images, four in each of four rows.

Clear Layout View–Clears all images in the window.

Email Layout–Displays the **Email** window. Use this window to email charts, images, or messages.

Image Capture Toolbar

The **Image Capture** toolbar enables you to capture and import images into the software. This toolbar is displayed only when the **Clinical Imaging** tab is in **Capture Mode.**

These buttons are on the **Image Capture** toolbar:

Live Video–Accesses live video.

Capture an Image from Live Video–Captures an image from live video.

Save Image–Saves an image.

Discard Image–Deletes an image.

Modify Various Aspects of Camera/Card–Enables you to customize your camera or video card settings.

Set the Capture and Color Depth–Sets capture and color depth.

View an Image–Displays an image.

Note

You can hide the **Clinical Image Capture** toolbar. To customize, right-click and select **Hide this Toolbar**.

Import an Image–Imports an image.

Import Images from a Digital Camera–Imports images from a digital camera.

Acquire an image from the currently selected TWAIN source–Imports an image from a TWAIN source.

Select a TWAIN Source–Select a TWAIN source from which to import an image.

Image Annotate Toolbar

The **Image Annotate** toolbar enables you to add notes to an image. The **Image Annotate** toolbar is displayed only when the **Clinical Imaging** tab is in **Annotate Mode**.

These buttons are on the **Image Annotate** toolbar:

Annotation Text Tools–Adds annotation text to an image.

Annotation Shape Tools–Adds an annotation shape to an image.

Annotation Stamp Tools–Adds an annotation stamp to an image.

Delete Selected Annotation(s)–Deletes one or more annotations.

Undo–Deletes the last action, and the previous annotation is reloaded.

Save Annotations–Saves the annotations to the image.

Reload Annotations–Reloads previous annotations.

Image Editor Toolbar

The **Image Editor** toolbar enables you to edit images. This toolbar is displayed only when the **Clinical Imaging** tab is in **Edit Mode**.

Save Images–Saves an edited image.

Reload Images–Reloads the previous image.

Note

If you have CS Imaging software, when an image and **Annotate Mode** or **Edit Mode** are selected, the imaging software is launched. If you do not have the imaging software, the annotation and editing tools work as outlined.

Note

To view an annotated image, select one in the **Clinical Detail** container, right-click, and select **Annotate**.

Using the Clinical Imaging Tab

The following examples show some of the ways to use the **Clinical Imaging** tab.

Viewing Images

You can view images in different formats. To view images:

1 Click the **Clinical Imaging** tab.

2 On the **Clinical Imaging** toolbar, click the **Layout Mode** button.

3 On the **Image Layout** toolbar, select the view you want–for example, **Layout View 1 by 1** or **Layout View 4 by 3**.

4 If it is not already selected, click the **Clinical Images** tab near the bottom of the window. Thumbnails of the images are displayed. Use the scroll bar if necessary to see additional images.

5 Select the image you want, and drag it to the main window of the **Clinical Imaging** tab.

Annotating and Editing Images

To annotate an image from the **Clinical Imaging** tab:

1 Click the **Annotation Mode** button on the **Clinical Imaging** toolbar. The **Image Annotate** toolbar is displayed.

2 Select an image from the **Clinical Images** tab near the bottom of the window. When an image is selected, the blue box around it turns green. To deselect an image, click it again, and the box turns from green to blue.

3 Drag the image to the main window of the **Clinical Imaging** tab. The image is displayed.

4 On the **Image Annotate** toolbar, select **Annotation Text Tools**. If the image was taken with Carestream Dental Imaging software, it opens in the software and can be annotated.

Note

If the image was taken with a digital camera, the **Edit Mode** window is displayed.

To edit annotations on an image:

1 Click the **Edit Mode** button on the **Clinical Imaging** toolbar. The **Image Editor** toolbar is displayed.

2 Select an image from the **Clinical Images** tab.

3 Drag the image to the main window of the **Clinical Imaging** tab. The image is displayed.

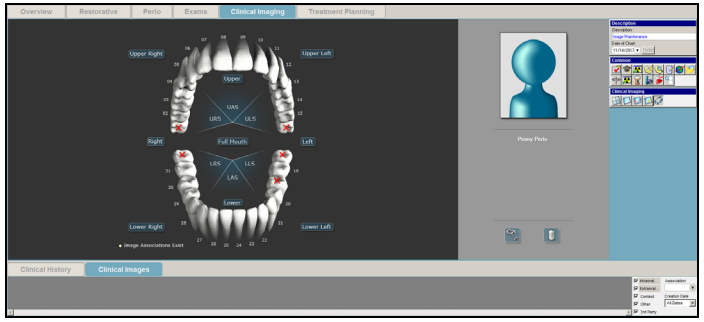
4 On the **Image Annotate** toolbar, select **Edit Mode**.

Using Organization Mode

When the **Clinical Imaging** tab is displayed in organization mode, you can associate images with a single tooth, a mouth region, or a patient portrait.

To associate an image:

1 Click the **Organization Mode** button on the **Clinical Imaging** tab. The **Organization Mode** window is displayed.



2 Choose from these options:

- To associate an image with a specific tooth, drag the image from the **Clinical Images** tab to the tooth. A yellow dot is displayed on the tooth to indicate that an image is associated with it.
- To associate an image with a specific region of the mouth, drag the image from the **Clinical Images** tab to the text that identifies the region. A yellow dot is displayed next to the region name to indicate that an image is associated with it.
- To use an image as a patient portrait, drag the image from the **Clinical Images** tab at the bottom of the chart to the portrait icon on the **Organization Mode** tab.

You can use these icons in the lower-right of the **Organization Mode** window:

Remove Associations–To remove image associations, select the image on the **Clinical Images** tab, and drag it to the **Remove Associations** icon. All associations with the image are removed.

Delete Image–To delete a patient clinical image, select the image on the **Clinical Images** tab, and drag it to the **Delete Image** icon. The image is deleted.

Displaying Fewer Images

These filters are displayed in the lower-right corner of all tabs:

To reduce the number of thumbnails displayed, select only the type of image you want.

Skill Sharpeners

Exercise 1—View a Layout

View a patient's bitewing x-rays, using the 1 by 1 layout view.

To view a patient's x-ray:

1 From the charting module with a chart containing bitewings displayed, click the **Clinical Imaging** tab. The **Clinical Imaging** window is displayed.

2 On the **Clinical Imaging** toolbar, select **Image Layout Mode**.

3 From the **Image Layout** toolbar, select **Layout View 1 by 1**.

4 Select the bitewing image. Drag it to the main window of the **Clinical Imaging** tab. The image is displayed in the 1 by 1 view.

Exercise 2—Add an Annotation

Add an annotation to the image and then remove the image.

To add an annotation to an image:

1 With the image displayed on the **Clinical Imaging** tab, click **Annotation Mode** on the **Clinical Imaging** toolbar. The charting module changes to annotation mode.

2 Select the tool you want on the **Image Annotate** toolbar.

3 Type the annotation.

4 To remove the image, click **Clear Layout View** from the **Image Layout** toolbar.

Exercise 3—Use Organization Mode

Associate the x-ray with a quadrant of the patient's mouth and then remove the association.

To associate an x-ray with the upper-left quadrant:

1 On the **Clinical Imaging** toolbar, click the **Organization Mode** button. The **Organization Mode** window is displayed.

2 On the **Clinical Images** tab, select the image of the bitewing.

3 Drag-and-drop the image on one of the text fields—**Upper Left**, **Upper Right**, **Lower Left**, or **Lower Right**. A yellow dot indicates that an association exists.

4 To remove the association, select it from the **Clinical Images** tab and drag it to the **Remove Associations** button.

Lesson 7

Using the Treatment Planning Tab

This lesson includes:

- Understanding the Treatment Planning Tab
- Setting Chart Options
- Accessing the Treatment Planning Tab
- Using the Treatment Planning Tab Toolbars
- Creating Treatment Plan Groups
- Moving Items from One Group to Another
- Building Case Presentations

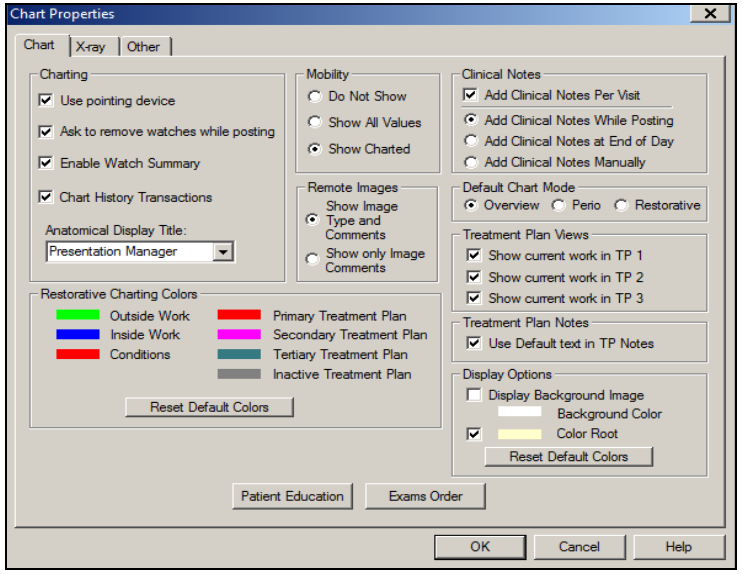
Understanding the Treatment Planning Tab

Treatment plans are created in the SoftDent practice management software or on the **Restorative** tab of the charting module. From the **Treatment Planning** tab, you can perform these activities:

- View the details of each treatment plan item.
- Switch procedures from one treatment plan to another.
- Change treatment plan group numbers.
- Delete treatment plan procedures.
- Indicate patient acceptance of a treatment plan.
- Indicate the completion of treatment plan procedures.
- Print a treatment plan.
- Schedule an appointment related to a treatment plan.
- Re-estimate insurance for a treatment plan procedure.
- View patient insurance eligibility.
- Access the presentation manager to display treatment plan information for the patient.

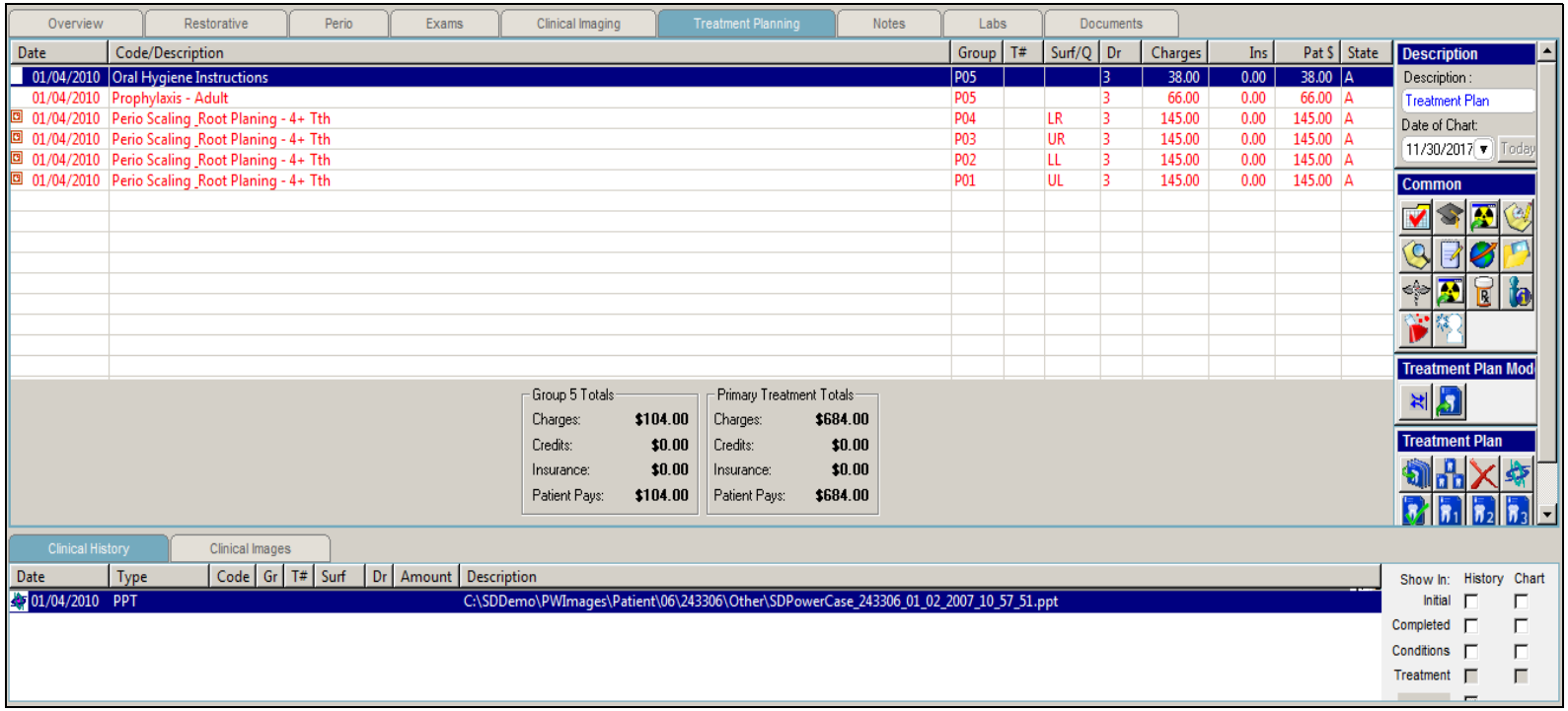
Setting Chart Options

Select **Chart > Options**, and the **Chart Properties** window is displayed. Set the options you want for treatment planning.



Accessing the Treatment Planning Tab

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



The **Treatment Plan Selection List** is a list of each procedure in the treatment plan, with the creation date, ADA or transaction code description, group number, tooth number, surface or quadrant number, provider who planned the treatment, total charge, estimated insurance payment, estimated patient portion, and status of each treatment plan item.

By default, items in the treatment plan are displayed in the order they were created.

A Microsoft PowerPoint software icon is listed to the left of each item for which a case presentation can be built.

Using the Treatment Planning Tab Toolbars

These toolbars are found on the **Treatment Planning** tab:

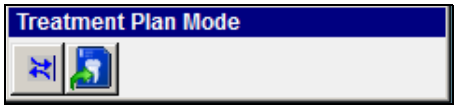
- **Common**
- **Treatment Plan Mode**
- **Treatment Plan**

Common Toolbar

The functions of the **Common** toolbar are the same as on the other tabs.

Treatment Plan Mode Toolbar

The **Treatment Plan Mode** toolbar enables you to toggle between the presentation manager and the treatment planning views.



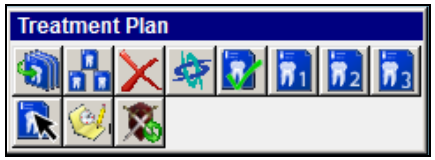
These buttons are on the **Treatment Plan Mode** toolbar:

Switch to Presentation Manager–Displays the **Presentation Manager** window.

Switch to Treatment Planning–Displays the **Treatment Planning** view.

Treatment Plan Toolbar

The **Treatment Plan** toolbar is the quickest way to edit and organize a treatment plan, check on insurance or eligibility, schedule an appointment, or print the treatment plan.



These buttons are on the **Treatment Plan** toolbar:

Switch selected items to TP1, TP2, or TP3–Select a treatment plan item and click to move the item to another treatment plan.

Click to change the TP group–Select a treatment plan item and click to change the group for that item.

Click to delete the selected item(s)–Select a treatment plan item and click to delete the item.

Click to build a SoftDent Case Presentation for the selected procedures–Select a treatment plan item and click to create a case presentation.

Click to change the treatment plan state–Select a treatment plan item and click to indicate that the patient has accepted it.

Complete primary treatment plan items–Click to indicate that all primary treatment plan items are complete. You are then prompted to post the items.

Complete secondary treatment plan items–Click to indicate that all secondary treatment plan items are complete. You are then prompted to post the items.

Complete tertiary treatment plan items–Click to indicate that all tertiary treatment plan items are complete. You are then prompted to post the items.

Complete selected treatment plan items–Select a treatment plan item and click to indicate that the item is complete.

Schedule Treatment Plan–Select a treatment plan item and click to display the **Treatment Plan Scheduling** window.

Re-estimate insurance–Select a treatment plan item and click to re-estimate insurance for the treatment plan.

Creating Treatment Plan Groups

A treatment plan may have many procedures. The procedures may be organized into as many as 99 groups. A group is one or more procedures in a treatment plan performed in the same appointment.

To create a treatment plan group:

1 From the **Restorative** tab, select the **Chart Treatment Plan** from the **Chart Mode** toolbar:

- To create a primary treatment plan group, click **Treatment Plan 1**.
- To create a secondary treatment plan group, click **Treatment Plan 2**.
- To create a tertiary treatment plan group, click **Treatment Plan 3**.

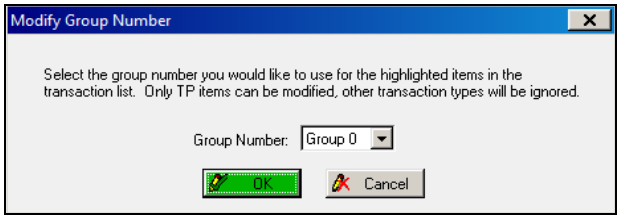
2 Chart the appropriate procedures to include in the group, and click **Save**.

Moving Items from One Group to Another

To move an item from one group to another within the same treatment plan:

1 Select the **Treatment Planning** tab.

2 Select the treatment plan item you want to change, and click **Click to change the treatment plan group** on the **Treatment Plan** toolbar. The **Modify Group Number** window is displayed.



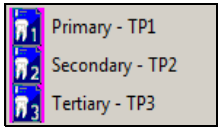
3 Select the group number from the **Group Number** drop-down list and click **OK**. The treatment plan group number is displayed in the **Group** column for the item.

Moving Items to Another Treatment Plan

To move an item from one treatment plan to another:

1 Select the **Treatment Planning** tab.

2 Select the item to move and click **Switch selected items to TP1, TP2, or TP3** on the **Treatment Plan** toolbar. A submenu is displayed.



3 Select the treatment plan you want. The letter identifying the treatment plan is displayed in the **Group** column for the item.

Multiple items can be selected using the **Ctrl** or **Shift** keys. To select contiguous procedures, click the first procedure, hold down the **Shift** key, and click the last procedure in the range.

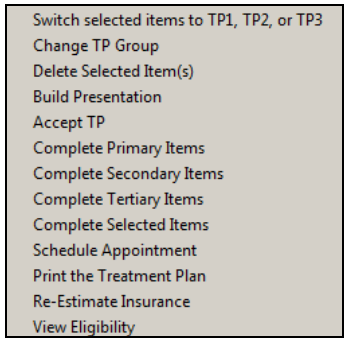
To select non-contiguous procedures, click the first procedure, hold down the **Ctrl** key, and click the other procedures you want to select.

Accepting Treatment Plan Procedures

To indicate that a patient has accepted one or more treatment plan procedures:

1 Select the **Treatment Planning** tab.

2 Select one or more procedures that the patient has accepted and right-click. The shortcut menu is displayed.



3 Select **Accept TP**. A confirmation message is displayed.

4 Click **Yes**. The letter **A** is displayed in the **State** column for each accepted procedure.

Note

If you do not select a group number when you are moving an item, it will automatically be included in group 1.

Updating a Treatment Plan Group

A group of procedures within a treatment plan may be in one of these states:

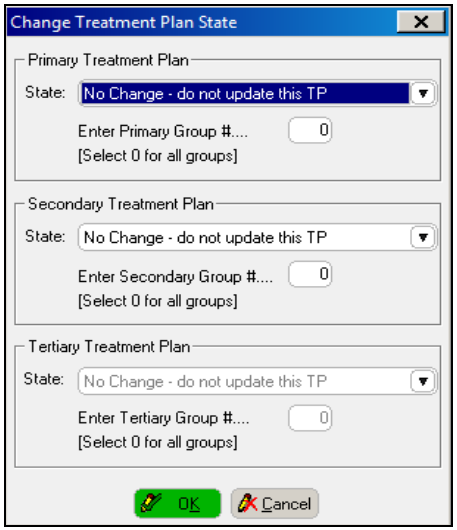
- **No change**–Do not update this treatment plan.
- **Diagnosed**–This is the initial state.
- **Presented**–The treatment plan has been presented.
- **Accepted**–The treatment plan is ready to be scheduled.
- **Scheduled**–The treatment plan is scheduled.
- **Declined**–Move transactions to archived treatment plan.

Important

Once archived, these items cannot be retrieved.

To change the status of a group in a treatment plan:

1 Select the procedure to be changed and click **Click to change the treatment plan state** on the **Treatment Plan** toolbar. The **Change Treatment Plan State** window is displayed.



2 In the appropriate section of the window–**Primary Treatment Plan**, **Secondary Treatment Plan**, or **Tertiary Treatment Plan**–select a status from the **State** drop-down list.

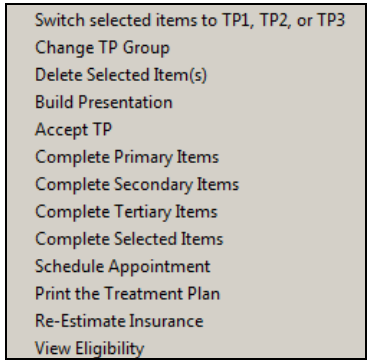
3 Type the group number to be updated or **0** for all groups.

4 Click **OK**.

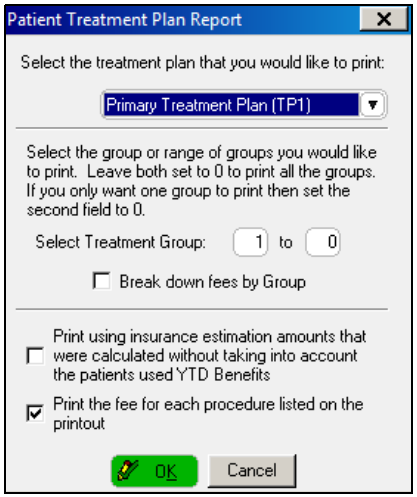
Printing a Treatment Plan

To print a treatment plan:

1 Select the **Treatment Planning** tab, select a procedure to be printed, and right-click. The shortcut menu is displayed.



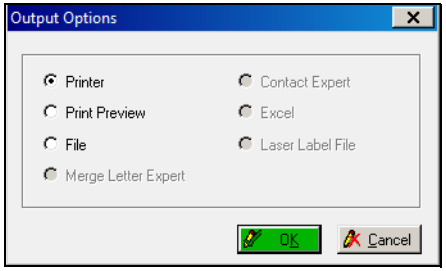
2 Select **Print the Treatment Plan**. The **Patient Treatment Plan Report** window is displayed.



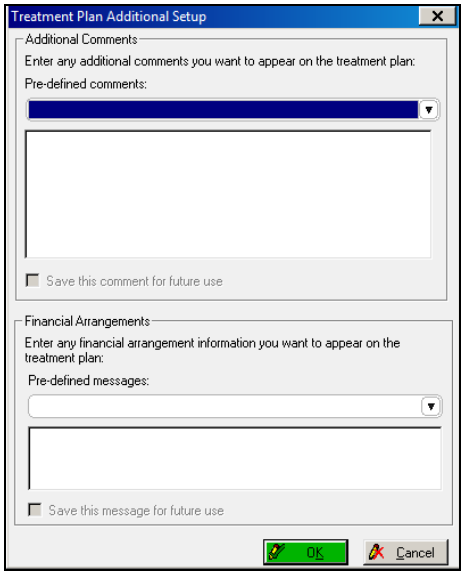
3 Select the treatment plan to print from the **Select the treatment plan that you would like to print** drop-down list.

4 Select the groups to print. Set the second field to **0** to print one group. Set both fields to **0** to print all groups.

5 Click **OK**. The **Output Options** window is displayed.



6 Select the option and click **OK**. The **Treatment Plan Additional Setup** window is displayed.



7 Type any additional comments or any financial arrangements to display on the treatment plan and click **OK**.

Completing a Treatment Plan Group

If a patient accepts the treatment plan and the work is performed for an entire group, you can post the treatment plan procedures from the charting module.

To post completed treatment plan items for an entire group from the **Treatment Planning** tab:

1 Select a treatment plan item that has been completed. Note which treatment plan–primary, secondary, or tertiary–it is on.

2 Click the corresponding button for the selected treatment plan on the **Treatment Plan** toolbar. A message asks if you want to post treatment plan items.

3 Click **Yes**.

Completing Selected Items in a Group

To post completed treatment plan items in a group:

1 Select a treatment plan item that has been completed.

2 Click **Complete selected treatment plan items** on the **Treatment Plan** toolbar. A message asks if you want to post the items.

3 Click **Yes**.

Deleting Treatment Plan Items

To delete a treatment plan item:

1 Select a treatment plan item that has been completed.

2 Click **Click to delete selected item(s)** from the **Treatment Plan** toolbar. A message asks you to confirm the deletion.

3 Click **Yes**.

Note

You can click the drop-down arrow to select a pre-defined financial note.

Note

Instead of deleting a treatment plan, you can change the status to **Declined - Move transactions to archived TP**.

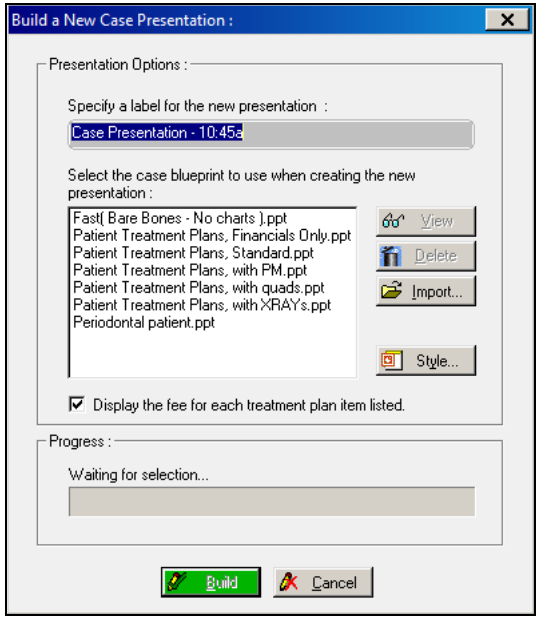
Building Case Presentations

You can use a case presentation to show the advantages of the treatment plan, or alternative treatment plans, to a patient.

To build a treatment plan case presentation from the charting module:

1 From the **Treatment Planning** tab, select the treatment plan items to include in the presentation.

2 Click **Click to build a SoftDent case presentation for the selected procedures** on the **Treatment Plan** toolbar. The **Build a New Case Presentation** window is displayed.



3 Type the presentation name, and select an option from the **Select the case blueprint to use when creating the new presentation**.

4 Select or deselect the **Display the fee for each treatment plan item listed** option and click **Build**. The presentation is displayed.

5 When done, click **Save**. The **SoftDent Case Presentation Module - Your Presentation is Ready!** window is displayed.

6 Select whether to show, edit, email, or do nothing to the presentation from the **What would you like to do right now?** section of the window.

7 Click **OK**.

Working with Case Presentations

When you build a treatment plan presentation, the presentation is attached to the patient's record and can be accessed from the document manager. Once a case presentation is built, you can do these things with it:

- Show
- Edit
- Print
- Email
- Delete
- View Properties

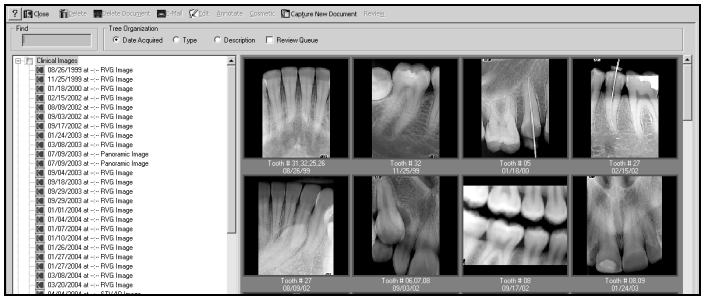
Note

The Case Presentation module is purchased separately from the Charting module. You must have Microsoft PowerPoint software on the computer on which the presentation is created.

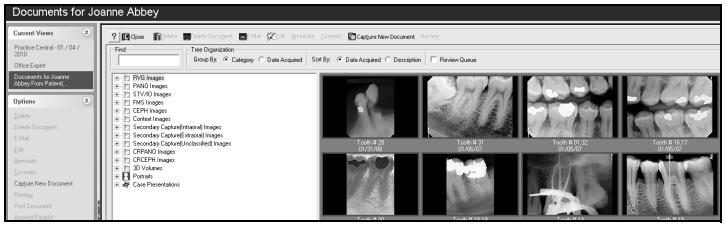
Show a Case Presentation

To show, or review, a case presentation from the **Treatment Planning** tab:

1 Click **Show Patient's Documents and Images** on the **Common** toolbar. The **Document Manager** window for that patient is displayed.

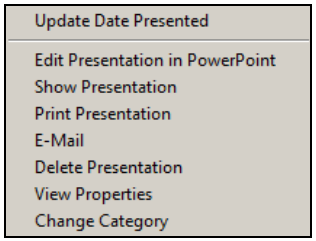


2 Scroll to the bottom of the window until the heading **Case Presentations** is displayed in the tree structure.



3 Click the plus (+) to expand the list of presentations.

4 Right-click the presentation you want to show to a patient. The shortcut menu is displayed.



5 Select **Show Presentation**. Microsoft PowerPoint opens on the first slide of the presentation. Use the arrows at the lower-left of the window to move through the presentation.

6 When you have moved through the last slide in the presentation, **End of the slide show** is displayed. Click the message to exit.

Editing Case Presentations

To edit a case presentation:

1 Click **Show Patient's Documents and Images** on the **Common** toolbar. The **Document Manager** window for that patient is displayed.

2 Scroll to the bottom of the window until the heading **Case Presentations** is displayed in the tree structure, and click the plus (+) to expand the list.

3 Right-click the presentation to edit and select **Edit Presentation in PowerPoint**. The presentation opens in Microsoft PowerPoint software.

4 Edit the presentation.

5 Click **Save** and click **Close**.

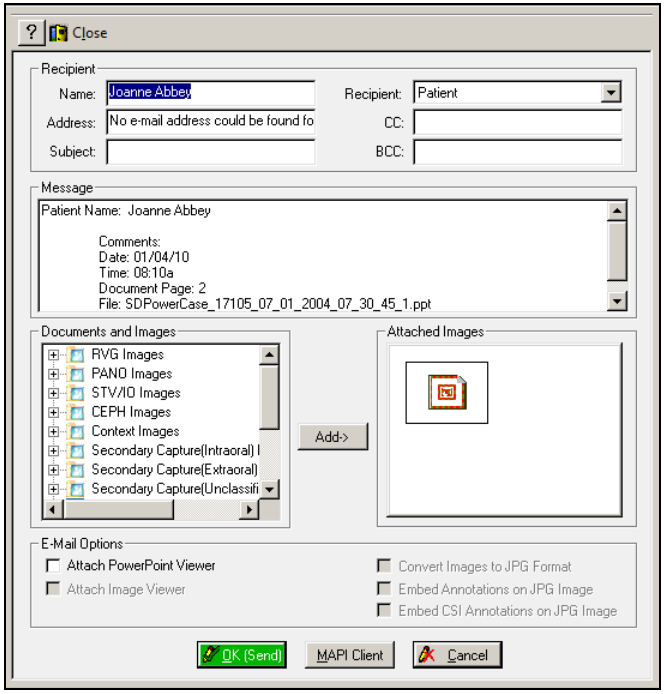
Emailing Case Presentations

To email a case presentation from the **Treatment Planning** tab:

1 Click **Show Patient's Documents and Images** on the **Common** toolbar. The **Document Manager** window for that patient is displayed.

2 Scroll to the bottom of the window until the heading **Case Presentation Module Presentations** is displayed in the tree structure and click the plus (**+**) to expand the list.

3 Right-click the presentation to email and select **Email**. The **Email** window is displayed.



4 Fill in the fields and click **OK (Send)**.

Skill Sharpeners

Exercise 1—Toggle Between Modes

Use the **Treatment Planning** toolbar to toggle between treatment planning mode and presentation mode.

To toggle between treatment planning mode and presentation mode:

1. Click the **Treatment Planning** tab.
2. Click the **Switch to Presentation Manager** button on the **Treatment Plan Mode** toolbar. The **Presentation Manager** window is displayed.
3. To switch to treatment planning mode, click the **Switch to Treatment Planning** button on the **Treatment Plan Mode** toolbar.

Exercise 2—Change the Group Number of a Procedure

Select a patient that has a treatment plan. One of the items in the treatment plan is an extraction single - uncomplicated on tooth 16. This procedure is in group P2. Change the group to P3.

To change the group number for this item:

1. Click the **Treatment Planning** tab.
2. Select the procedure whose group you want to change.
3. Click **Click to change the treatment plan group** from the **Treatment Plan** toolbar, or right-click and select **Change TP Group** from the menu. The **Modify Group Number** window is displayed.
4. Select a different group number from the **Group Number** drop-down list. The **Treatment Selection List** displays again, and the change is displayed.

Next, return the item to the correct treatment plan:

1. Select the procedure.
2. Click **Click to change the treatment plan group** from the **Treatment Plan** toolbar, or right-click and select **Change TP Group** from the menu. The **Modify Group Number** window is displayed.
3. Select the correct group number from the **Group Number** drop-down list. The **Treatment Selection List** displays again, and the change is displayed.

Exercise 3—Print a Treatment Plan

Print the secondary treatment plan for a patient.

To print a treatment plan:

1. On the **Treatment Planning** tab, right-click. The **Treatment Planning Shortcut Menu** is displayed.
2. Select **Print the treatment plan**. The **Patient Treatment Plan Report** window is displayed. In the **Select the treatment plan that you would like to print** field, click the drop-down list and select **All**, **TP1**, **TP2**, or **TP3**.
3. Print all groups, so set both fields to **0**.
4. Click **OK**. The **Output Options** window is displayed.
5. Select the option you want and click **OK**. The **Treatment Plan Additional Setup** window is displayed.
6. Enter any additional comments you want or any financial arrangements that you want to appear on the treatment plan and click **OK**.

Exercise 4—Sort Treatment Plan Items

Sort the treatment plan items by tooth number. Then sort by treatment-plan group number.

To sort treatment plan items by tooth number:

1 On the **Treatment Planning** tab, click the column header **T#**. The treatment plan items are sorted by tooth number, from highest to lowest.

2 Click the **T#** column heading again, and the items are sorted by tooth number from lowest to highest.

You can sort treatment plan items by treatment-plan group number, date, code, surface, doctor, charges, and insurance and patient costs. To sort the list by any column, click the column heading.

Exercise 5—Build a Case Presentation

Build a case presentation for a treatment plan. Entitle the presentation **TestPresentation1**. Make sure that the fees associated with each procedure are in the presentation.

To build a case presentation:

1 On the **Treatment Planning** tab, select the items in the treatment plan.

2 On the **Treatment Plan** toolbar, click **Click to build a SoftDent case presentation for the selected procedures**. The **Build a New Case Presentation** window is displayed.

3 In the **Specify a label for the new presentation field**, type the name for the presentation: **TestPresentation1**.

4 Select one of the options in the **Select the case blueprint to use when creating the new presentation**.

5 Click **View** to preview the presentation.

6 Review the presentation and click **End of slide show, click to exit**.

7 In the **Build a New Case Presentation** window, select **Display the fee for each treatment plan item listed**.

8 Click **Build**.

9 Review the presentation and click **Close**. The **SoftDent Case Presentation Module - Your Presentation is Ready!** window is displayed.

10 Select **I want to email the presentation to the patient or referring doctor** and click **OK**. The **SoftDent Email** window is displayed. The patient information is displayed, and the presentation is attached.

11 Review the recipient information and make any corrections.

12 Type a message to the patient.

13 To send the presentation, you would click **OK (Send)**. For this exercise, click **Cancel**.

Note

Case Presentation is an add-on module that can be purchased.

Lesson 8

Using Notes in Charting

This lesson includes:

- Understanding Clinical Notes in Charting
- Using Patient Clinical Notes
- Handling Generic Clinical Notes

Understanding Clinical Notes in Charting

You can record clinical notes from any tab in the charting module. You can create these notes:

- Clinical notes to attach to patient's records
- Generic notes that can be used repeatedly
- Default notes that are automatically attached when the associated ADA procedure is performed
- Primary treatment plan notes
- Secondary treatment plan notes
- Tertiary treatment plan notes

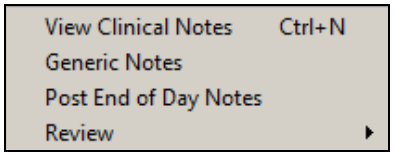
You can add notes while you are charting, when you are posting transactions, with every visit, or at the end of the day. You can view notes that were created in the charting module from the **Patient** and **Patient List** windows in SoftDent.

Patient clinical notes are used to attach notes that specify an ADA code, tooth number, surface, provider, or condition to a patient record. The various types of notes display in different colors in the **Clinical Notes List** window.

- **Black**–Patient notes
- **Green**–Clinical notes associated with an initial chart
- **Red**–Treatment plan notes for TP1
- **Magenta**–Treatment plan notes for TP2
- **Teal**–Treatment plan notes for TP3

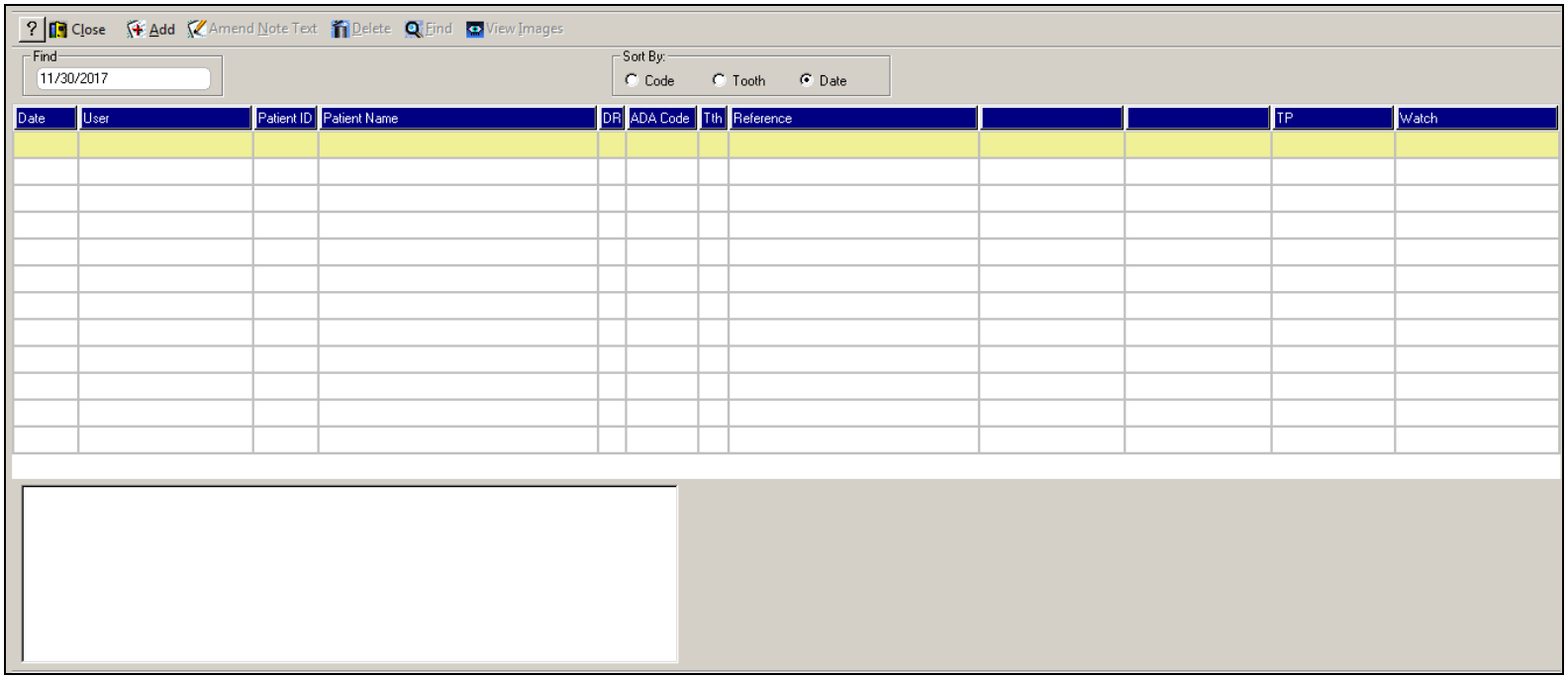
Using Patient Clinical Notes

The functions you perform using clinical notes are found on the **Clinical Notes** menu.



Accessing the Notes Tab

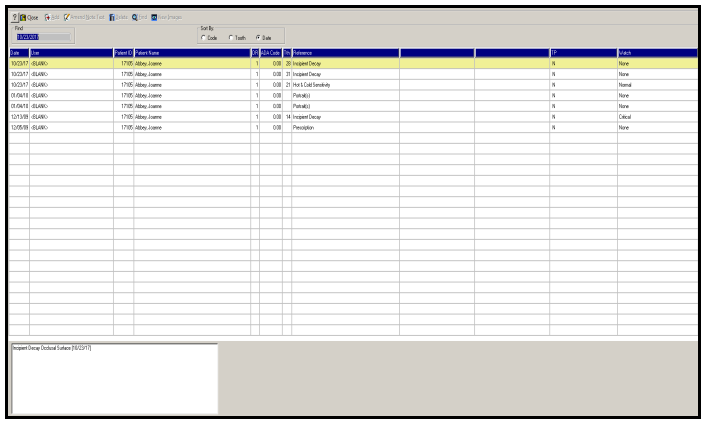
Click the **Notes** tab, and the **Clinical Notes** window is displayed.



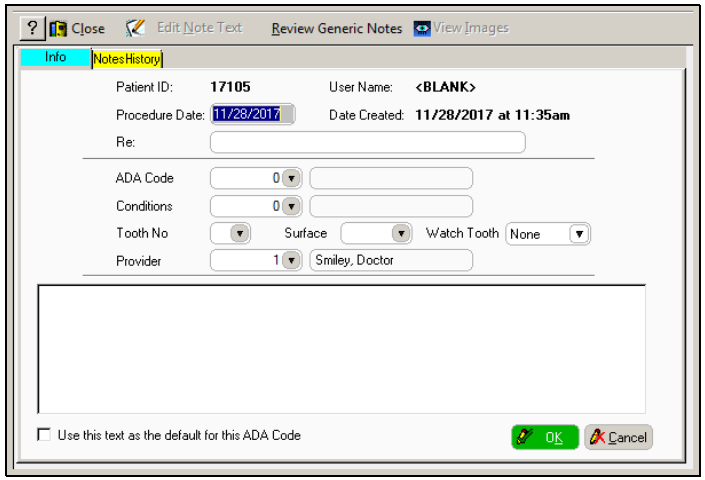
Adding Patient Clinical Notes

To add a patient clinical note while charting:

1 Click the **Notes** tab or select **Clinical Notes > View Clinical Notes**. The **Patient Clinical Notes List** window is displayed.



2 Press **Enter**, and click **Add**. The **Patient Clinical Notes** window is displayed. The patient identification number, the current date and time, and the provider's name and identification number are displayed in the appropriate fields.



3 Type a brief description of the note's contents in the **Re** field. The text entered in this field is displayed in all clinical notes list windows. If, however, there was a generic note linked to a provider, the **Re** line is overwritten when that note populates, so fill in that line last.

4 Select the appropriate options:

- Select the procedure code from the **ADA Code** drop-down list. You can select only a production code or explosion code from this list.
- Select a condition or watch-tooth number from the appropriate drop-down list.
- If appropriate, select the tooth or surface information and watch information from the drop-down lists.
- Select the provider from the list.

5 Type text in the **Note** field. The original note can contain 1,024 characters.

6 When you select an ADA code and a provider, any default note displays automatically. If you want a new note, type the words you want. If you want to save this note as the default, select the **Use this text as the default for this ADA Code** option.

7 Click **OK**. If no generic note is associated with this clinical note, the **Adding a Generic Note** window is displayed. Select whether to make the generic note for the selected doctors or all doctors and click **OK**.

8 Click **Close**. The **Patient Clinical Notes List** window is displayed.

9 Click **Close**.

Editing Patient Clinical Notes

You can edit a saved patient clinical note on the day it was created. Notes that can be edited are displayed in red text in the **Patient Clinical Notes List** window.

To edit a clinical note:

1. Click the **Notes** tab or select **Clinical Notes > View Clinical Notes**. The **Patient Clinical Notes List** window is displayed.
2. Select the note to edit, and click **Edit Note Text**. The note is displayed in the **Patient Clinical Notes** window.
3. Edit the note text, click **OK**, and click **Close**.

Amending Patient Clinical Notes

You cannot edit a patient clinical note after the day it was saved; a note can only be amended with additional text. Each amendment is automatically dated, and the original note and all amendments can be viewed in the **Clinical Notes History** window.

To amend a clinical note:

1. Click the **Notes** tab or select **Clinical Notes > View Clinical Notes**. The **Patient Clinical Notes List** window is displayed.
2. Select the note to amend, and click **Amend Note Text**. The note is displayed in the **Patient Clinical Notes** window.
3. Type the note text in the field and click **OK**.
4. To view a clinical note with all amendments and revisions, select the **Notes History** tab on the **Patient Clinical Notes** window.
5. Click **Close**.

Adding Clinical Notes While Posting

To add clinical notes while posting:

1. Be sure that **Add Clinical Notes While Posting** is selected in the **Chart Options Properties** window. After posting a procedure, the **Add Clinical Notes** window is displayed.
2. Click **Yes** to add a clinical note for the procedure. The **Patient Clinical Notes** window is displayed.
3. Type text in the **Note** field and click **OK**. If no generic note is associated with this clinical note, the **Adding a Generic Note** window is displayed. Select whether to make the generic note for the selected doctors or all doctors and click **OK**.
4. Click **Close**.

Adding Clinical Notes at End of the Day

If you prefer not to enter clinical notes at the time of the procedure, you can enter them later using the end of the day clinical notes feature. These notes can be added from any tab.

To add clinical notes at the end of the day:

1. Be sure that **Add Clinical Notes While at End of Day** is selected in the **Chart Properties** window.
2. Chart and post a procedure.
3. Click **Review end of day notes** on the **Common** toolbar. The **Work Performed** window is displayed.

4 Select one of the following:

- To view a list of work that has no notes assigned, click **Current and Treatment Plan Work Without Notes Assigned**.
- To view a list work that has had notes assigned, click **Current and Treatment Plan Work that has had Notes Assigned**.

5 Select the procedure for which a note is to be added, and click **Add/Edit Note**. The **Patient Clinical Notes** window is displayed.

6 Type text in the **Note** field and click **OK**. If no generic note is associated with this clinical note, the **Adding a Generic Note** window is displayed. Select whether to make the generic note for the selected doctors or all doctors and click **OK**. The **Work Performed** window is displayed.

7 Repeat steps 5 and 6 until done.

8 Click **OK**.

Reviewing Patient Clinical Notes

You can review all patient clinical notes, and view notes by date and tooth. To review clinical notes:

1 Select from these options:

- To view the patient's clinical notes, click the **Notes** tab. The **Patient Clinical Notes List** window is displayed. You can add and amend clinical notes and view the note history and associated images.
- To view the patient's clinical notes in the order they were created, select **Clinical Notes > Review > Patient Notes by Date**. The **Patient Clinical Notes by Date List** window is displayed. You can add and amend clinical notes and view the note history and associated images.
- To review the patient's clinical notes by tooth order, select **Clinical Notes > Review > Patient Notes by Tooth**. The **Patient Clinical Notes by Tooth No. List** window is displayed. You can add and amend clinical notes and view the note history and the associated images.

Note

Clinical notes can be sorted by code, tooth, or date.

2 To view the images associated with a note, select the note and click **View Images**. The **Images for Note** window is displayed.

3 Click **Close**.

Creating Default Clinical Notes

To create a default clinical note:

1 Click the **Notes** tab. The **Clinical Notes List** window is displayed.

2 Press **Enter** and click **Add**. The **Clinical Note** window is displayed.

3 Type a brief description of the note's contents in the **Re** field.

4 Select the appropriate options:

- Select the procedure code from the **ADA Code** drop-down list.
- Select a condition or watch-tooth number from the appropriate drop-down list.
- If appropriate, select the tooth or surface information and watch information from the drop-down lists.
- Select the provider from the list.

Note

You can also view clinical notes by provider and ADA code.

5 Type text in the **Note** field.

6 Type the note details.

7 Select **Use this text as the default for this ADA Code**.

8 Click **OK**. If no generic note is associated with this clinical note, the **Adding a Generic Note** window is displayed. Select whether to make the note generic and click **OK**.

9 Click **Close**.

Default clinical notes can speed up the note entry process. Default text is displayed automatically in the **Note** field. Default notes are orange in the **Clinical Note List** window.

Adding Clinical Notes for Treatment Plans

Adding a clinical note for a treatment plan is identical to adding a patient clinical note. Treatment plan notes can be amended, but not edited. Treatment plan notes for TP1 are red, TP2 notes are magenta, and TP3 notes are teal.

Handling Generic Clinical Notes

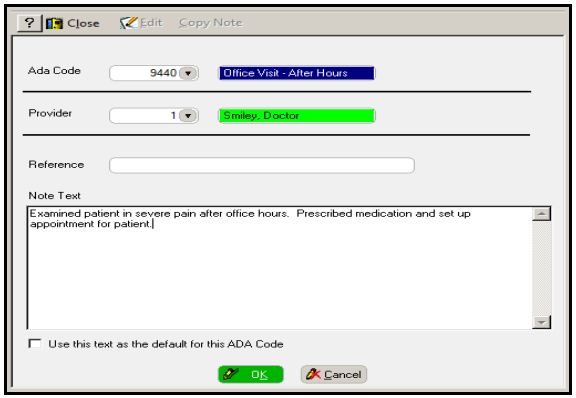
Generic notes are associated with a specific provider or procedure. They can be added as often as needed to a patient's chart. Unlike patient clinical notes, generic notes can be edited. In clinical notes list windows, generic notes are displayed in blue.

Creating Generic Clinical Notes

To create a generic clinical note:

1 In the **Chart for** window, select **Clinical Notes > Generic Notes**. The **Generic Clinical Notes List** window is displayed.

2 Press **Enter** and click **Add**. The **Clinical Notes** window is displayed.



3 Select a procedure code from the **ADA Code** drop-down list and select a provider from the **Provider** drop-down list.

4 Type a brief description of the note's contents in the **Reference** field.

5 Type additional information in the **Note Text** field.

6 To use this note as a default when posting a procedure, select the **Use this text as the default for this ADA code** option.

7 Click **OK**.

8 Click **Close**.

Editing Generic Clinical Notes

To edit a generic clinical note:

1 In the **Chart for** window, select **Clinical Notes > Generic Notes**. The **Generic Clinical Notes List** window is displayed.

2 Select the note and click **Edit**. The note is displayed in the **Clinical Note** window.

3 Make the changes, click **OK**, and click **Close**.

Copying Generic and Default Clinical Notes

You can copy a generic or default clinical note and add it to a provider's list of notes.

To copy a generic or default clinical note:

1 In the **Chart for** window, select **Clinical Notes > Generic Notes**. The **Generic Clinical Notes List** window is displayed.

2 Select a note from the list and click **Copy Note**. The **Copy Note to Selected Providers** window is displayed.

3 Select the provider for whom the note will be copied, and click **OK**.

Reviewing Generic and Default Clinical Notes

You can review generic and default clinical notes by procedure or provider. When you are in the **Generic Clinical Notes** window, a **Y** in the default column indicates that this is a default note, which is displayed in orange. An **N** in the default column indicates this is not a default note, but another version of the note for the same procedure, which is displayed in blue.

To review generic and default clinical notes:

1 Select from these options:

- To view all the generic or default clinical notes associated with a provider in the order the notes were created, select **Clinical Notes > Review > Provider Notes by Date**. The **Provider Clinical Notes by Date List** window is displayed.
- To view all the generic or default clinical notes associated with a provider in the order of patient identification number, select **Clinical Notes > Review > Provider Notes by Patient**. The **Provider Clinical Notes by Patient List** window is displayed.
- To view all the generic or default clinical notes associated with an ADA procedure code, select **Clinical Notes > Review > Notes by ADA Code**. The **Clinical Notes by ADA Code** window is displayed.

Generic notes are displayed in blue, and a **G** is displayed in the **Generic** column. Default notes are displayed in orange, and a **D** is displayed in the **Default** column.

2 To view the images associated with a note, select the note and click **View Images**. The **Images for Note** window is displayed.

3 Click **Close**.

Note

To review only generic notes, select **Clinical Notes > Generic Notes**.

Skill Sharpener

Exercise 1—Print Clinical Notes

You want to print all notes within certain ranges.

To print each of these clinical notes:

1 To print a generic note, select **Clinical Notes > Generic Notes**. The **Generic Clinical Notes List** window is displayed. Select a note and click **Print**. The **Enter Code Range** window is displayed. Type the code range and click **OK**.

Select the printer and click **OK**.

2 To print a patient note, select **Clinical Notes > Review > Patient Notes by Date** or **Clinical Notes > Review > Patient Notes by Tooth**. Select a note and click **Print**. The **Enter Report Dates** window is displayed. Type the date range and click **OK**.

Select the printer and click **OK**.

3 To print a clinical note for a specific provider, select **Clinical Notes > Review > Provider Notes by Date** or **Clinical Notes > Review > Provider Notes by Patient**. Select a note and click **Print**. The **Enter Report Dates** window is displayed. Type the date range and click **OK**.

Select the printer and click **OK**.

4 To print a clinical note for a specific ADA code, select **Clinical Notes > Review > Notes by ADA Code**. Select a note and click **Print**. The **Enter Code Range** window is displayed. Type the code range and click **OK**.

Select the printer and click **OK**.

Lesson 9

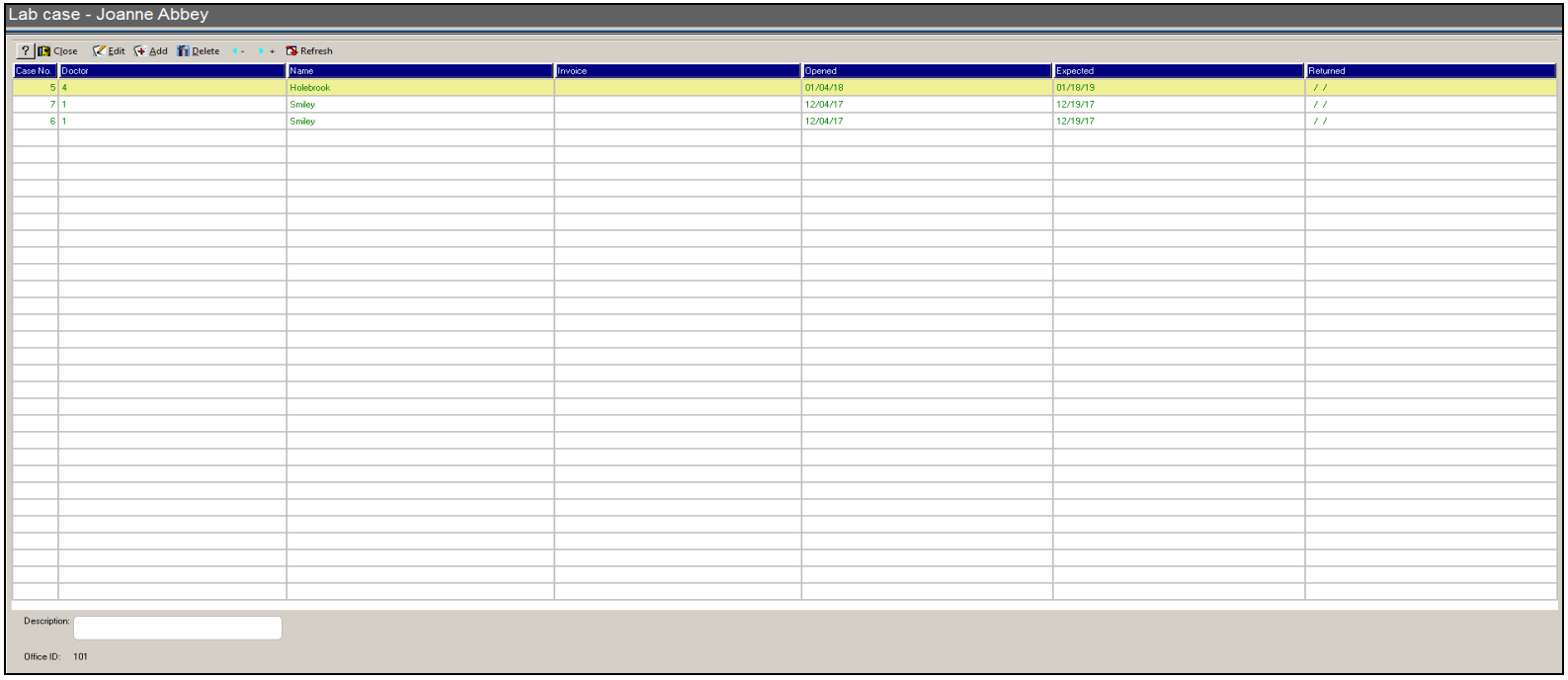
Using the Labs Tab

This lesson includes:

- Adding a Lab Case
- Editing a Lab Case
- Deleting a Lab Case

Accessing the Labs Tab

Click the **Labs** tab, and the **Lab case** window is displayed.

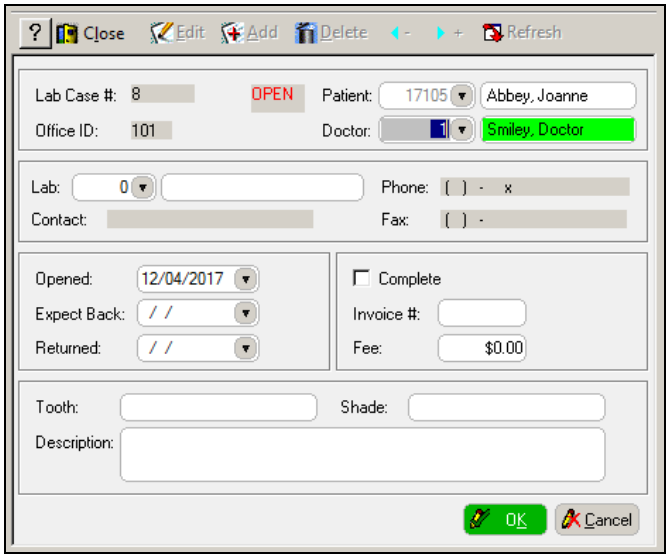


From the **Labs** tab, you can view lab cases, add new cases, and edit or delete existing cases.

Adding a Lab Case

To add a lab case:

1 Click the **Labs** tab. The **Lab case** window is displayed.



2 Click **Add**. The **Lab case** window is displayed in ADD mode.

3 Select the patient, doctor, and lab from the drop-down lists and change the **Opened** and **Expect Back** fields.

4 Type information in the **Tooth**, **Shade**, and **Description** fields.

5 Click **OK**. The lab case is saved, and you are prompted to create a reminder memo for the day the lab case is due back.

6 Click **Yes** to generate a memo.

7 Click **Close**.

Editing a Lab Case

To edit a lab case:

1 Click the **Labs** tab. The **Lab case** window is displayed.

2 Click **Edit**. The **Lab case** window is displayed in EDIT mode.

3 Change the information, and click **OK**.

4 Click **Close**.

Deleting a Lab Case

To delete a lab case:

1 Click the **Labs** tab. The **Lab case** window is displayed.

2 Click **Delete**. A message confirms the deletion.

3 Click **Yes**.

4 Click **Close**.

Skill Sharpener

Exercise 1—Add a Lab Case

You are working in the charting module, and you want to add a lab case directly from the module.

To add a lab case:

1. Click the **Labs** tab. The **Lab case** window is displayed.
2. Click **Add**. The **Lab case** window is displayed in ADD mode.
3. Leave the patient's name as is, but change the doctor and the lab from the drop-down lists.
4. Change the **Opened** and **Expect Back** fields.
5. Type information in the **Tooth**, **Shade**, and **Description** fields.
6. Click **OK**. The lab case is saved, and you are prompted to create a reminder memo for the day the lab case is due back.
7. Click **Yes** and **Close**.

Lesson 10

Using the Documents Tab

This lesson includes:

- Accessing the Documents Tab
- Using the Document Manager

See the SoftDent online help for more information about working with the document manager.

When you click the **Documents** tab, the **Documents for** window is displayed. In the **Documents for** window, you can:

- View all documents attached to a patient, including:
  - Images
  - Portraits
  - Documents
  - Case presentations
- Delete an image or document.
- Email an image or document.
- Edit a document.
- Annotate an image.
- Make cosmetic changes to an image.
- Delete a document or image.
- Capture a new document.

You can group the document tree organization by **Category** or **Date Acquired**. You can sort the documents by **Date Acquired** or **Description**.

You can display a shortcut menu for many of the document functions.

To display a shortcut menu:

1 Right-click an item in the **Document** tree. The shortcut menu is displayed.

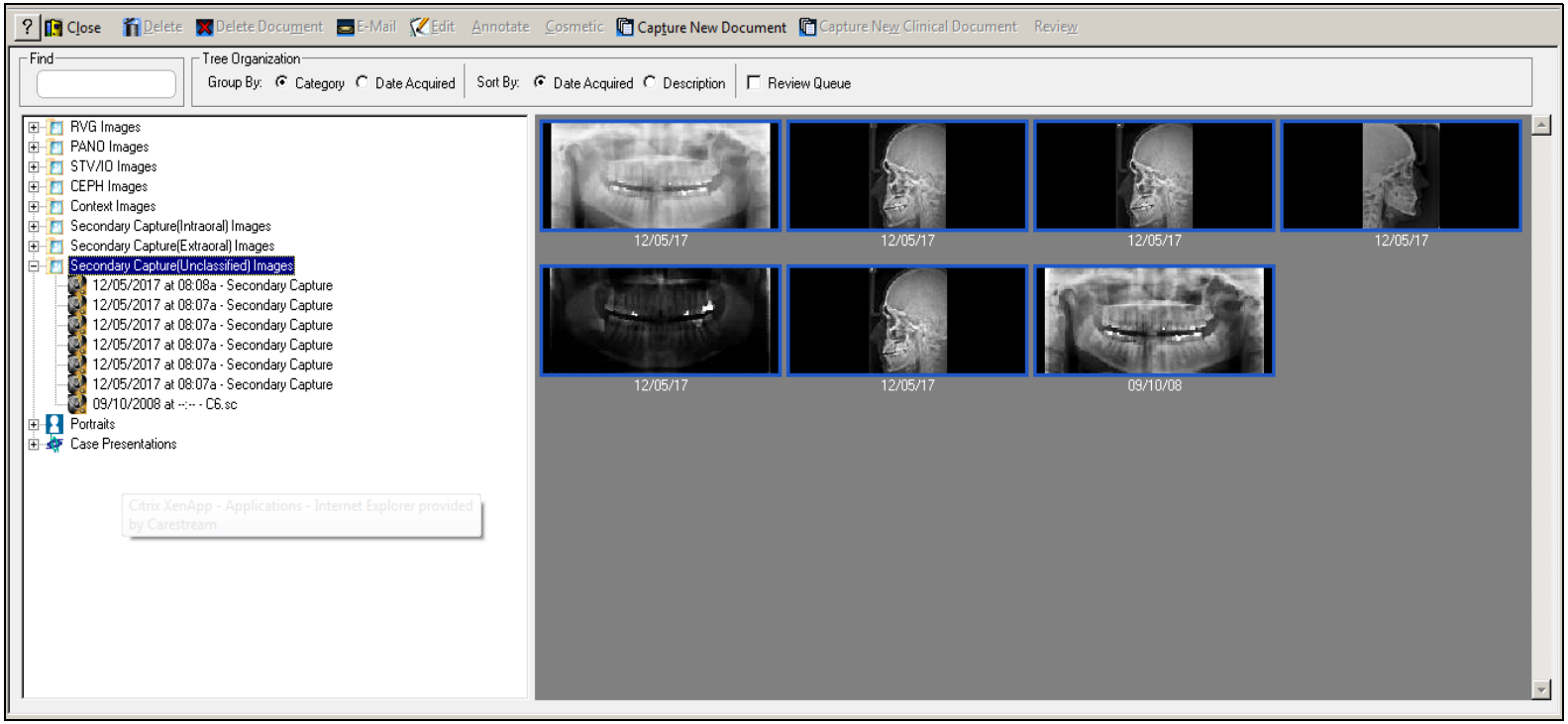
2 Select the function you want.

Tip

See the SoftDent online help for information about working with images.

Accessing the Documents Tab

Click the **Documents** tab, and the **Documents for** window is displayed.



Using the Document Manager

When you click the **Documents** tab, you access the document manager in the SoftDent software. Use the document manager to view and manipulate documents associated with:

- Accounts
- Patients
- Referring doctors
- Claims
- Completed claims
- Insurance companies
- Insurance plans
- Laboratory cases

Reviewing Documents

You can assign account, patient, referring doctor, claim, ePostings, insurance company, insurance plan, and lab case documents to another user to review. The reviewer can then review the document, add review notes, or assign it to another user.

Organizing Documents in the Document Tree

You can use grouping and sorting options to organize the documents in the document tree. You can also customize the way documents are saved and organized.

The following grouping and sorting options are available:

- **Group By Category**
- **Group By Date Acquired**
- **Sort By Date Acquired**
- **Sort By Description**

Managing Documents

In the **Documents for** window, you can:

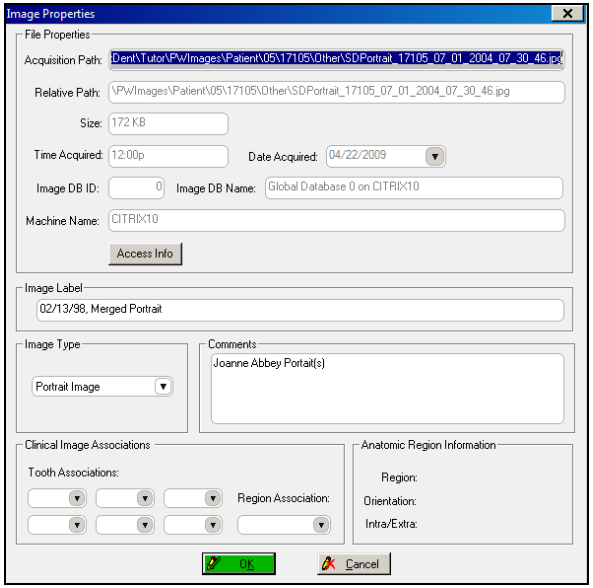
- Set properties
- Set capture preferences
- Capture new
- Edit
- Email
- Annotate
- Change a category

Setting Properties

To set document properties:

1 In the **Documents for** window, select the document from the document tree.

2 Select **Properties** from the **Options** section of the Express bar. The **Image Properties** window is displayed.



3 Edit the document label, make an annotation, and associate the document with a tooth, if appropriate.

4 Click **OK**.

Setting Capture Preferences

To set the capture preferences for a document type:

1 In the **Documents for** window, select **Capture Preferences** from the **Options** section of the Express bar. The **Preferences for** window is displayed.

2 Select the document type from the **Type** drop-down list.

3 Type the default page name for all documents of the same type in the **Default description for new documents** field.

4 Type the default tooltip label for all documents of the same type in the **Default Description for new Images** field.

5 To save each document automatically, select **AutoSave each acquisition**.

6 To enter information for each document automatically when emailing from the document manager, select **Initialize message text with page annotations when Emailing Documents**.

7 To display the **Enter Name Information** window each time you save a document, select **Prompt for document name when adding new documents**.

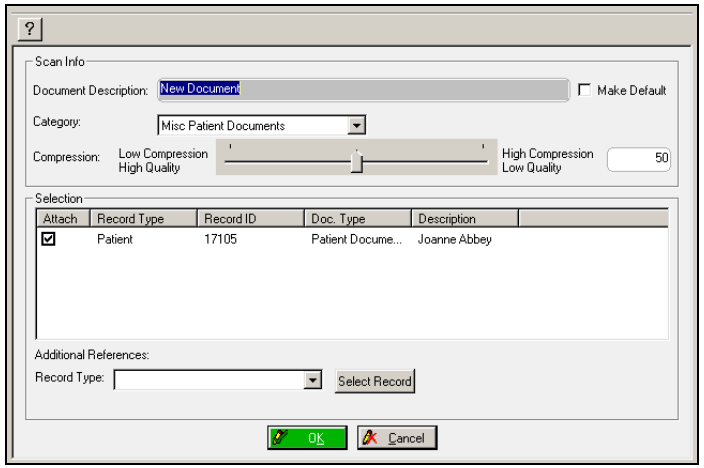
8 To display the **Enter Name Information** window each time you save a document, select **Prompt for page label when scanning a new page**.

9 Click **OK**.

Adding New Documents

To add a new document or image:

1 Click **Capture New Document**. The **Scan Info** window is displayed.



2 Type the document's name in the **Document Description** field.

3 To use the name as the default for all new documents of the selected type, select **Make Default**.

4 To select a different category, double-click it in the **Category** drop-down field.

5 Move the slider to the appropriate compression quality. You can also type the quality in the field next to the slider.

Image files are compressed to save space on the hard drive. When a file is compressed, some information is lost. The greater the compression, the lower the quality of the image.

6 Deselect any records to which the document is not to be attached from the list in the **Selection** section. The document is attached to all records selected in the list.

7 To attach the document to other records, select the type from the **Record Type** drop-down list, click **Select Record**, and select the record.

8 Click **OK**. The **Documents for capture** window is displayed.

9 Select an option:

- To select a TWAIN compliant device–Click **Select a TWAIN source**. The **Select Source** window is displayed. Select the source, and click **Select**.
- To acquire an image using a TWAIN device–Click **Acquire an image from the currently selected TWAIN source**. The source software is launched. Acquire the image.
- To import an image or document that is already on the network–Click **Import an image**. The **Import Images** window is displayed. Select the image and click **Open**.

10 Click **Save Capture**. A message asks you to confirm the addition.

11 Click **Yes**. The **Enter Document Information** window is displayed.

12 Type the page label text in the **Page Label** field, or leave the default text, which is the original file name.

13 To make the text the default page label for new documents of the same type, select **Make Default**.

14 Click **OK**.

15 Click **Close**.

Editing Documents

To edit a document:

1 In the **Documents for** window, select the document in the tree, right-click, and select **Edit**.

2 Make changes to the document, and click the **Save** button.

Tip

When you edit an image, the Dental Imaging software opens and you make changes there.

Emailing Documents

To email a document or image:

1 In the **Documents for** window, select the document or image and click **Email**. The **SoftDent Email** window is displayed.

2 Select an option:

- To send the email to the primary insurance company, the primary insurance plan, a lab that has an open lab case, or a referring doctor associated with the patient, select the party from the **Recipient** drop-down list.
- To send the email to another party, type the recipient's name in the **Name** field and the email address in the **Address** field.

3 Type information in the **Subject** and **Message** fields. A tree view of all documents, images, and charts associated with the patient is displayed in the **Documents and Images** section. Place the mouse over an image or document to view details.

4 To attach an additional document or image to the email, select it from the **Documents and Images** section, and click **Add**. Place the mouse over an image in the **Attached Images** section to view details.

Tip

A 3D volume cannot be emailed, due to its size.

Note

If you are importing a document that is not an image file, click the drop-down arrow in the **Files of Type** field and select **All Files**.

5 To remove a document or image from the **Attached Images** section, right-click the document or image and select **Remove Image**.

6 To send the email, click **OK (Send)**.

Annotating Images

You can add the following to images:

- Text
- Notes
- Shapes
- Stamps

To annotate a document or image:

1 In the **Documents for** window, select the image, and click **Annotate**. The **Annotate Image** window opens in the Dental Imaging software.

2 Click **Annotation Text Tools**.

3 To specify the text or note text color, click the color box in the **Attributes** section. The **Color** window is displayed. Select the color and click **OK**.

4 Select an option:

- To add text–Select **Text** and use the pointer to select the text insertion point. Type the text in the box.
- To add a note–Select **Note** and use the pointer to select the note insertion point. Type the note in the box.
- To hide text and note annotations–Deselect **Show Annotations**.

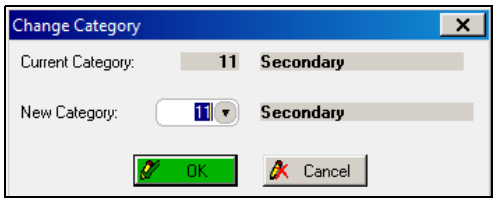
5 Click **Save Annotations**.

Changing Categories

To change a category:

1 In the **Documents for** window, right-click an image or document.

2 Select **Change Category**. The **Change Category** window is displayed.



3 Change the category and click **OK**.

Skill Sharpeners

Exercise 1—Add a Document

To add a document:

1. Click **Capture New Document**. The **Scan Info** window is displayed.
2. Type **TestImage** in the **Document Description** field.
3. Deselect the records to which the document is not to be attached from the list in the **Selection** section.
4. Click **OK**. The **Documents for capture** window is displayed.
5. Click **Import an image**. The **Import Images** window is displayed. Select the image and click **Open**.
6. Click **Save Capture**. A message asks you to confirm the addition.
7. Click **Yes**. The **Enter Document Information** window is displayed.
8. Type the page label text in the **Page Label** field, or leave the default text, which is the original file name.
9. Select **Make Default**.
10. Click **OK**.
11. Click **Close**.

Exercise 2—Annotate an Image

To annotate an image:

1. In the **Documents for** window, select the image, and click **Annotate**. The **Annotate Image** window is displayed.
2. Click **Annotation Text Tools**.
3. Click the color box in the **Attributes** section. The **Color** window is displayed. Select blue and click **OK**.
4. Select **Text** and use the pointer to select the text insertion point. Type the text in the box.
5. Click **Save Annotations**.

Index

Numerics

3/4 metal crown button 18
3D object, scanning 3

A

amalgam button 18
annotate mode button 44
annotation stamp tools button 46
annotations
    adding text 46
    deleting 46
    saving 46
annotations shape tools button 46
annotations text tools button 46
auto advance 28

B

bleeding button 25
buttons
    3/4 metal crown 18
    amalgam 18
    annotate mode 44
    annotation shape tools 46
    annotation stamp tools 46
    annotation text tools 46
    capture mode 44
    chart bleeding 25
    chart cracks 19
    chart decay 19
    chart diastema 19
    chart FGM 24
    chart furcation grade 24
    chart muco-gingival junction 25
    chart pocket depth 24
    chart suppuration 25
    core buildup 18
    edit mode 44
    exams summary 35
    free gingival margin 24
    full cast metal crown 18
    image layout 44
    implant 18
    layout mode 44
    missing teeth 19
    new exam 35
    occlusal exam 35
    organization mode 44
    other conditions 19
    periapical 19
    periapical condition 27
    perio screen exam 35
    perio tissue exam 35
    porcelain fused to metal crown 18
    post and core 18
    reload images 46
    resin 18
    resin fused to metal crown 18
    save annotations 46
    save images 46
    sealant 18
    sedative filling 18
    soft tissue exam 35
    stainless steel crown 18

temporary crown 18
TMJ exam 35
undo 46
veneer 18
voice activation 25

C

calculus toolbar 27
capture mode button 44
capture preferences, setting 78
case presentations
building 58
editing 59
emailing 60
showing 59
working with 58
categories, changing 80
chart
emailing 5
modes of viewing 17
printing 2
chart options, setting 51
charting module
accessing 1
closing 1
exiting 1
sections 2
tabs 2
clinical detail tab container, hiding 2
clinical history tab
displaying 2
hiding 2
maximizing 2
clinical images tab
displaying 2
maximizing 2
clinical imaging tab 47
clinical imaging tab, accessing 43
clinical imaging toolbar 44
clinical notes
adding 65, 66
adding to treatment plans 68
amending 66
copying 69
creating default 67
editing 66
generic 68
patient 63
reviewing 67
commands, voice activation module 31
commands, voice recognition 31
common toolbar 4
conditions toolbar 19
core buildup button 18
cracks button 19
current chart, viewing 17
customized charting paths 27

D

decay button 19
diastema button 19
digital camera 46
document properties, setting 77
document tree 77
documents
adding 78
annotating 80
changing categories 80
editing 79
emailing 79
organizing 77
setting properties 77
using the Documents tab 75
viewing 75
documents tab 75

E

edit mode button 44
email, chart 5
exams
perfoming occlusal exam 39
performing occlusal exam 37
performing periodontal tissue 36, 39
performing soft tissue 36, 39

exams option toolbar 35
exams summary button 35
exams toolbars 35, 44

F

FGM button 24
free gingival margin (FGM) button 24
full cast metal crown button 18
furcation grade button 24

G

generic notes 68
grouping and sorting options 77
groups, creating for treatment plan 54

I

image annotate toolbar 44, 46
image capture toolbar 44, 45
image editor toolbar 44, 46
image layout buttons 44
image layout toolbar 44
images
- adding 78
- annotating 46, 47, 80
- associating 48
- capturing 3D 3
- capturing ceph 3
- capturing CR 7400 3
- capturing intraoral 3
- capturing panoramic 3
- capturing RVG 3
- deleting 45, 48
- display filters 48
- edit 46
- editing 47
- emailing 79
- importing 46
- opening imaging software 3
- removing associations 48
- saving 45
- using the Documents tab 75
- viewing 45, 47

implant button 18
inside work mode 17
insurance, re-estimating 54

K

keypad toolbar 25

L

lab cases
- adding 72
- deleting 72
- editing 72

labs tab 71
layout mode button 44

M

main toolbar 2
Medvisor software, accessing 3
MGJ button 25
missing teeth button 19
mobility toolbar 19
modes
- inside work 17
- organization 48
- outside work 17
- restorative 15
- treatment plan 17
- view current chart 17
- viewing charts 17

N

new exam button 35
notes
- adding 3
- adding at end of day 66
- adding for treatment plan 68
- adding patient 65
- amending patient 66
- creating default clinical 67
- editing patient 66
- generic 68

patient 63
printing 70
reviewing 67
reviewing default clinical 69
reviewing generic clinical 69
notes tab 63

O

occlusal exam 37, 39
occlusal exam button 35
online help, accessing 2
options
chart 51
setting 15
setting perio 21
video capture 41
organization mode 48
organization mode button 44
other tooth conditions button 19
outside work mode 17
overview tab 11, 13

P

paths, customized charting 27
patient banner 3
patient exams toolbar 35
patient notes 63
periapical button 19
periapical condition button 27
perio, toolbars 23
perio conditions toolbar 27
perio mobility toolbar 26
perio screen exam button 35
perio tab 21
accessing 22, 64, 76
setting options 21
perio tissue exam button 35
perio views toolbar 23
periodontal tissue exam 36, 39
plaque toolbar 26
pocket depth button 24
porcelain fused to metal crown button 18
post and core button 18
presentation manager 53
printing
clinical notes 70
treatment plan 56
probe toolbar 24
procedure codes toolbar 18
providers
selecting 2
changing from default 2

R

reload images button 46
resin button 18
resin fused to metal crown button 18
restorative tab
accessing 15, 16
setting options 15
toolbars 17

S

save annotations button 46
save images button 46
sealant button 18
sedative filling button 18
soft tissue exam button 35
soft tissue exam, performing 36, 39
stainless steel crown button 18
suppuration button 25

T

tabs
clinical imaging 47
documents 75
labs 71
notes 63
overview 11
perio 21
restorative 15
treatment planning 51, 53

temporary crown button 18
TMJ exam button 35
toolbar 53
toolbars
  calculus 27
  clinical imaging 44
  common 4
  conditions 19
  displaying 7
  displaying/hiding 17
  exams 35, 44
  exams option 35
  hiding 7
  image annotate 44, 46
  image capture 44, 45
  image editor 44, 46
  image layout 44
  keypad 25
  listing all 7
  main 2
  mobility 19
  patient banner 3
  patient exams 35
  perio 23
  perio conditions 27
  perio mobility 26
  perio views 23
  plaque 26
  probe 24
  procedure codes 18
  restorative tab 4, 17
  tab-specific 7
  treatment plan 53
  treatment plan mode 53
  treatment planning 53
treatment plan
  button 17
  viewing 17
treatment plan mode 53
treatment plan toolbar 53
treatment planning tab 51, 52, 53
treatment plans
  accepting procedures 55
  building a case presentation 53
  changing states 54
  changing the TP group 53
  completing a group 57
  completing items 54, 57
  creating groups 54
  deleting items 57
  moving items from groups 54
  moving items to other plans 55
  printing 56
  scheduling 54
  switching items among plans 53
  updating groups 55
TWAIN source 46

U

undo button 46

V

veneer button 18
video capture options, setting 41
voice activation 29
voice activation button 25
voice activation module
  commands 31
  installing 30
  training 30
  using 29
voice recognition, commands 31

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