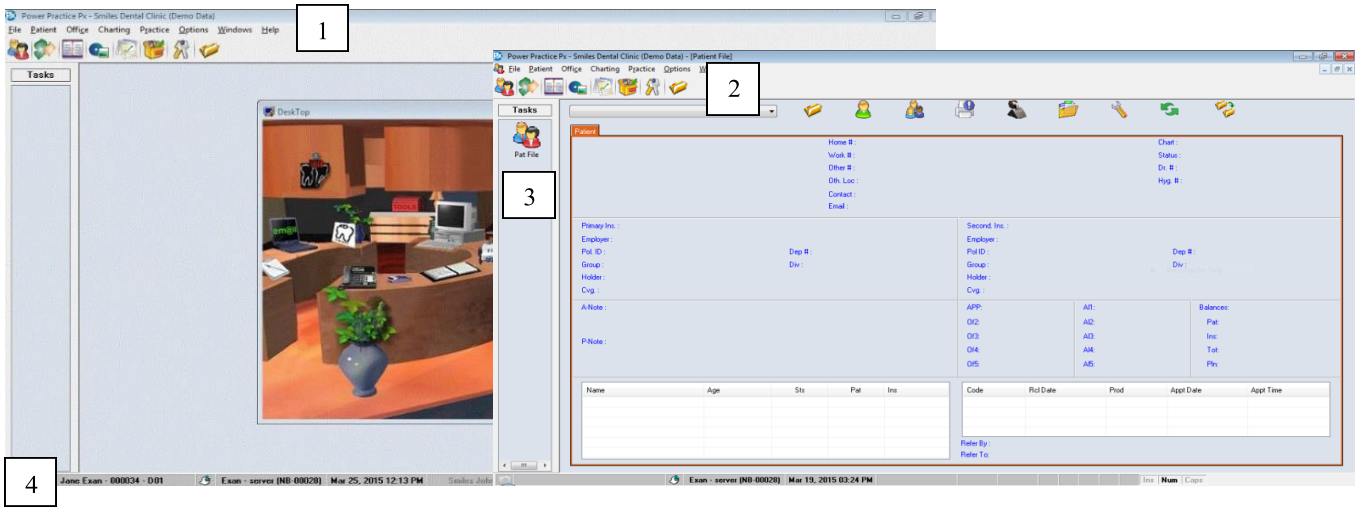
PX 301: Advanced Charting

VERSION 5.1

PX 301: Advanced Charting

Lesson 1: Power Practice Settings

1.1 Power Practice Main Screen



The Power Practice main window contains four areas.

1. At the top of the window are the **Menu Bar** commands (File, Patient, Office, Charting, Practice, Options, Windows and Help) used to go anywhere in the Power Practice program and to other programs that are in the system, such as word processing (Microsoft Word) or digital imaging.

2. Below the Menu Bar is the **Toolbar** (pictures or icons), showing the different areas in the program. These are shortcuts for some of the menu bar commands. The toolbar can be customized per user to display the icons that are accessed routinely.

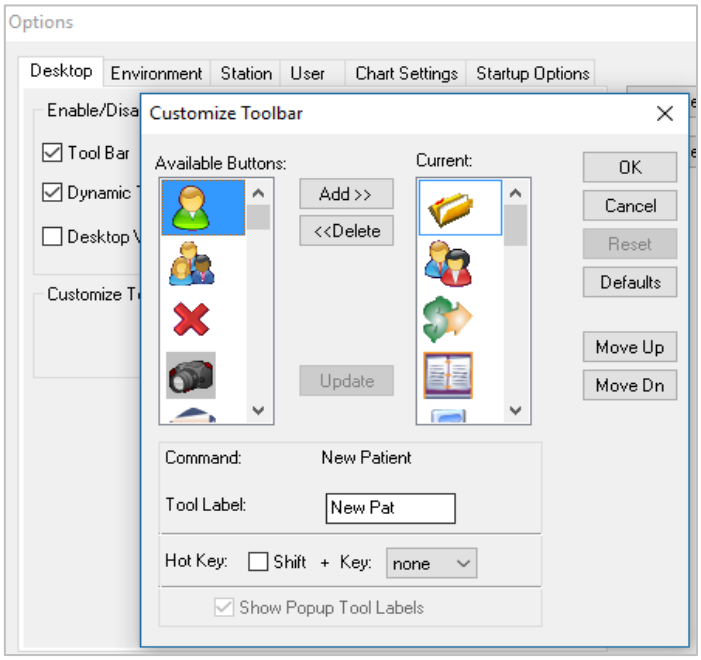
3. On the left side of the window is the **Tasks** sidebar, which lists each open module with the selected patient. Selecting an item in the list will access that working area.

4. At the bottom of the window is the **Status** Bar which displays basic information about the system, such as the current patient with chart number, user logon id, computer name, date and time, comment history, health alerts, and if the Insert, Num Lock or Cap Lock keys are set on the keyboard.

1.2 Customizing the Main Screen

Each user has the ability to create a customized Main Screen with preferences for Power Practice. The most common areas for customization include the Toolbar Icons, Single-Patient Mode, and Startup Options.

How to Customize the Toolbar

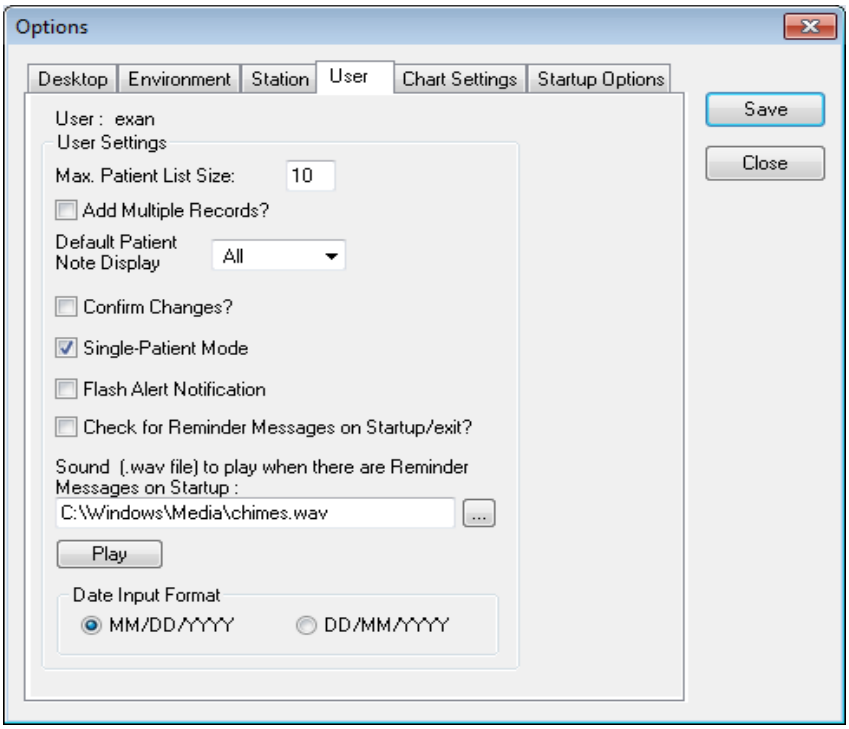


1. Click on the **Options** icon or choose **Options** from the Menu Bar.
2. Click on the **Setup** button under the **Desktop** tab.
3. Select from **Available Buttons**.
4. Choose **Add** to add it into **Current**.
5. Delete from **Current** list to remove an icon.
6. Choose **Move Up** or **Move Down** to rearrange icons.
7. Click **OK** to save.

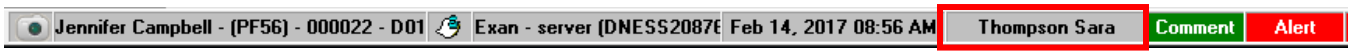
How to Set Single-Patient Mode

1. Within the **Options** window, select the **User** tab.
2. Click **Single-Patient Mode.**
3. Click **Save**.

Hint: Single Patient Mode will not allow the user to multi task.



How to Show Provider in Status Bar

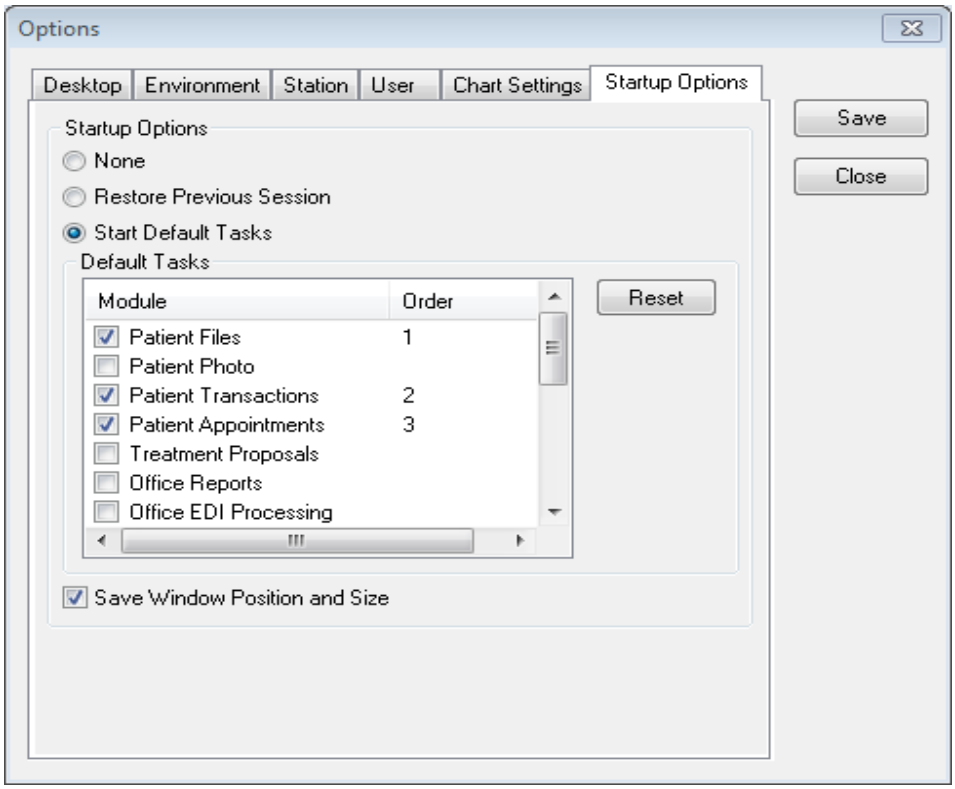


1. Within the **Options** window, select the **Chart Settings** tab.
2. Click **Show Provider in Status Bar**.
3. Click the **Save** button.

How to Customize Startup Options

1. Within the **Options** window, select the **Startup Options** tab.
2. Click **Start Default Tasks**.
3. Under **Module**, choose the screens to open when logged on to Power Practice.
4. Click the **Save** button.

Hint: The last module chosen will be the first screen seen when opening Power Practice.

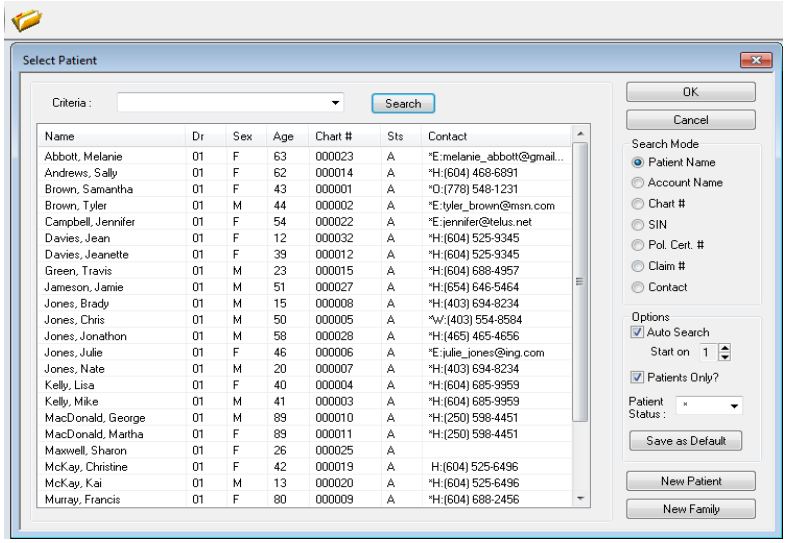


Other Startup Options:

Restore Previous Session will restore the modules opened when you last logged out of Power Practice.
Save Window Position and Size will reopen modules to the same size they were when you logged out.
Choosing both Restore Previous Session and Save Window Position and Size will restore your last modules in exactly the same spot and size they were when you logged out of Power Practice
Note: If one of the windows is maximized upon shut down, when the program opens, all windows will open in the maximized format. Above features apply if windows chosen are specifically sized.

1.3 Patient Search

In order to access data, a Search for the specific patient is required. The Search icon is available within the Patient File, Transactions, and Appointment Scheduler, or as an icon on the Toolbar (uses this icon only if in Single-Patient Mode). There are multiple search criteria available to use.



How to Search the Database

1. Click the **Open/Select** icon. 
2. Choose the **Search Mode** criteria.

Hint: For the Patient Name search, type in the last name. As each letter is entered, the auto search will filter out patients that do not match. To search by first name type a comma, then begin entering the name. The Contact mode will search for any phone number or email address.

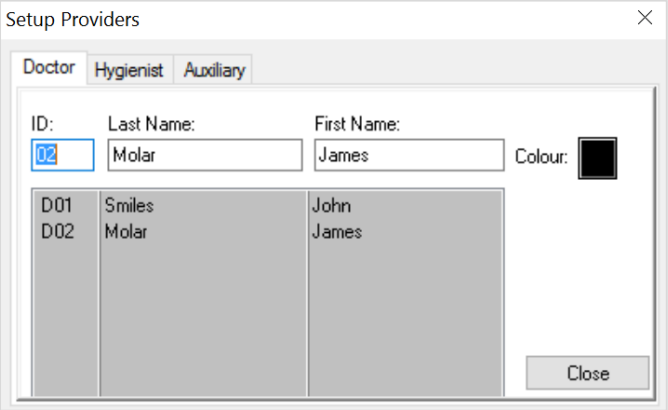
3. Highlight the desired patient name when it appears and click **OK**

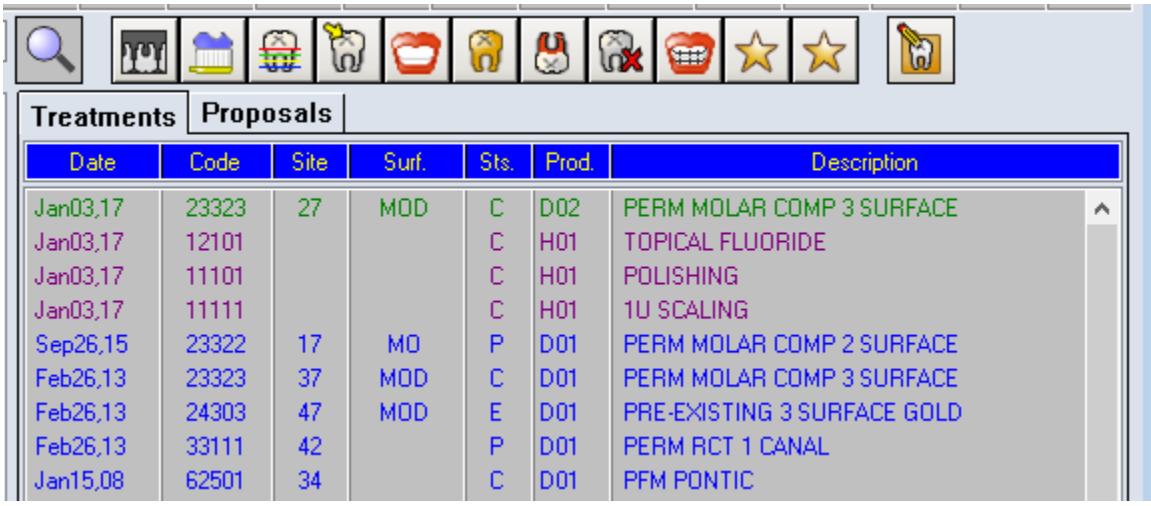
Lesson 2: Odontogram

2.1 Changing Producer Colours

You can change the colour of text for the producer's treatment and their note entries to easily differentiate when looking in the History Listing box and Patient History.

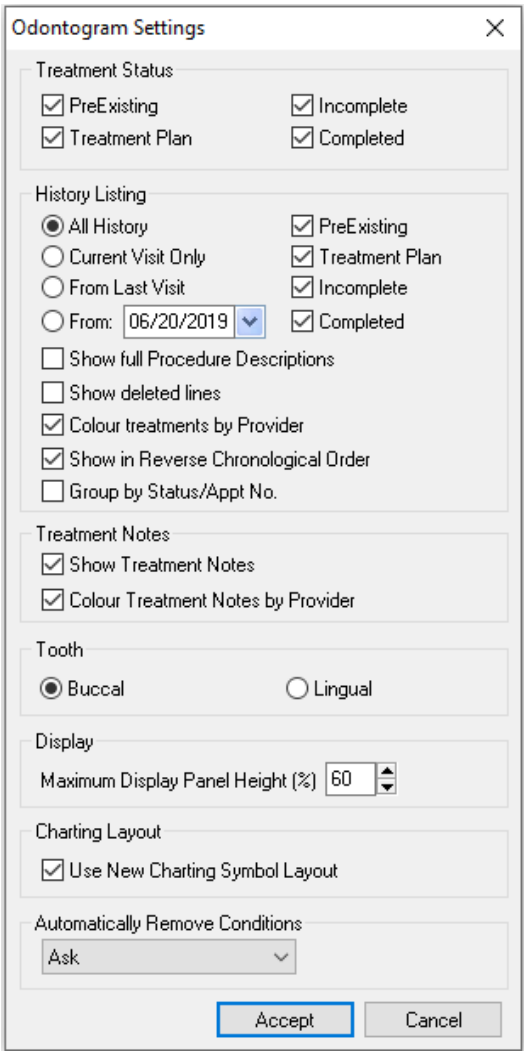
1. Left-click on the **Charting** menu and select **Provider Setup/Selection**.
2. Highlight the producer you want to change.
3. Click on the colour box.
4. Select the desired colour.
5. Click **Ok** to save.



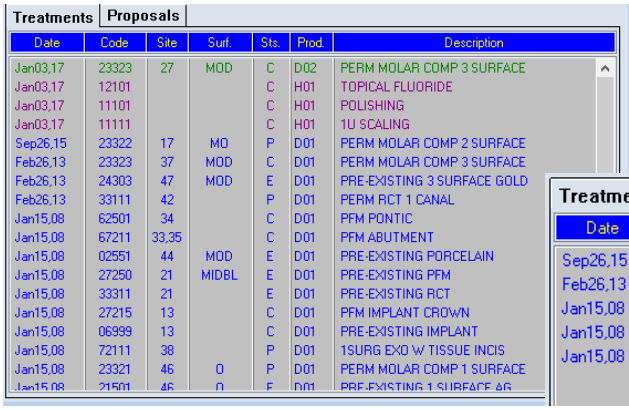


2.2 Understanding Odontogram Settings

Using the Odontogram Settings to customize your view can increase your efficiency when looking through treatment history and charting new treatment.



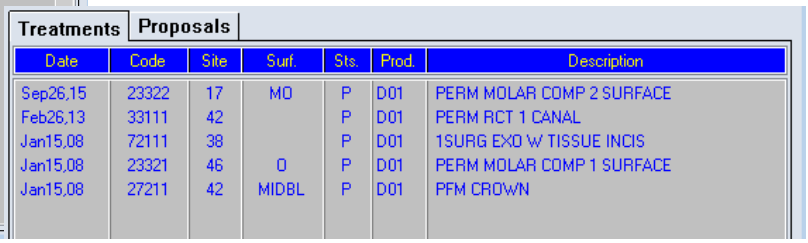
Section	Description
Treatment Status	Specifies which treatment status to display on the odontogram.
History Listing	Chooses which options to view in the History Listing. Note: Colours are set up in **Provider Setup/Selection** in the chart menu.
Treatment Notes	Select to show full treatment notes instead of the notes symbol.
Tooth	View odontogram by Buccal or Lingual surface.
Display	Adjusts the percentage of the viewing space of the odontogram versus the history listing.
Charting Layout	Uses new layout for charting symbols.
Automatically Remove Conditions	Choose an option to automatically remove Caries/Fractures when posting fillings or crowns.



Treatments | Proposals

Date	Code	Site	Surf.	Sts.	Prod.	Description
Jan03,17	23323	27	MOD	C	D02	PERM MOLAR COMP 3 SURFACE
Jan03,17	12101			C	H01	TOPICAL FLUORIDE
Jan03,17	11101			C	H01	POLISHING
Jan03,17	11111			C	H01	1U SCALING
Sep26,15	23322	17	MO	P	D01	PERM MOLAR COMP 2 SURFACE
Feb26,13	23323	37	MOD	C	D01	PERM MOLAR COMP 3 SURFACE
Feb26,13	24303	47	MOD	E	D01	PRE-EXISTING 3 SURFACE GOLD
Feb26,13	33111	42		P	D01	PERM RCT 1 CANAL
Jan15,08	62501	34		C	D01	PFM PONTIC
Jan15,08	67211	33,35		C	D01	PFM ABUTMENT
Jan15,08	02551	44	MOD	E	D01	PRE-EXISTING PORCELAIN
Jan15,08	27250	21	MIDBL	E	D01	PRE-EXISTING PFM
Jan15,08	33311	21		E	D01	PRE-EXISTING RCT
Jan15,08	27215	13		C	D01	PFM IMPLANT CROWN
Jan15,08	06999	13		C	D01	PRE-EXISTING IMPLANT
Jan15,08	72111	38		P	D01	1SURG EXO W TISSUE INCIS
Jan15,08	23321	46	O	P	D01	PERM MOLAR COMP 1 SURFACE
Jan15,08	21501	46	O	E	D01	PRE-EXISTING 1 SURFACE AG

Tip: To easily view previously planned treatment, change the settings to show only planned in the history listing box.



Treatments | Proposals

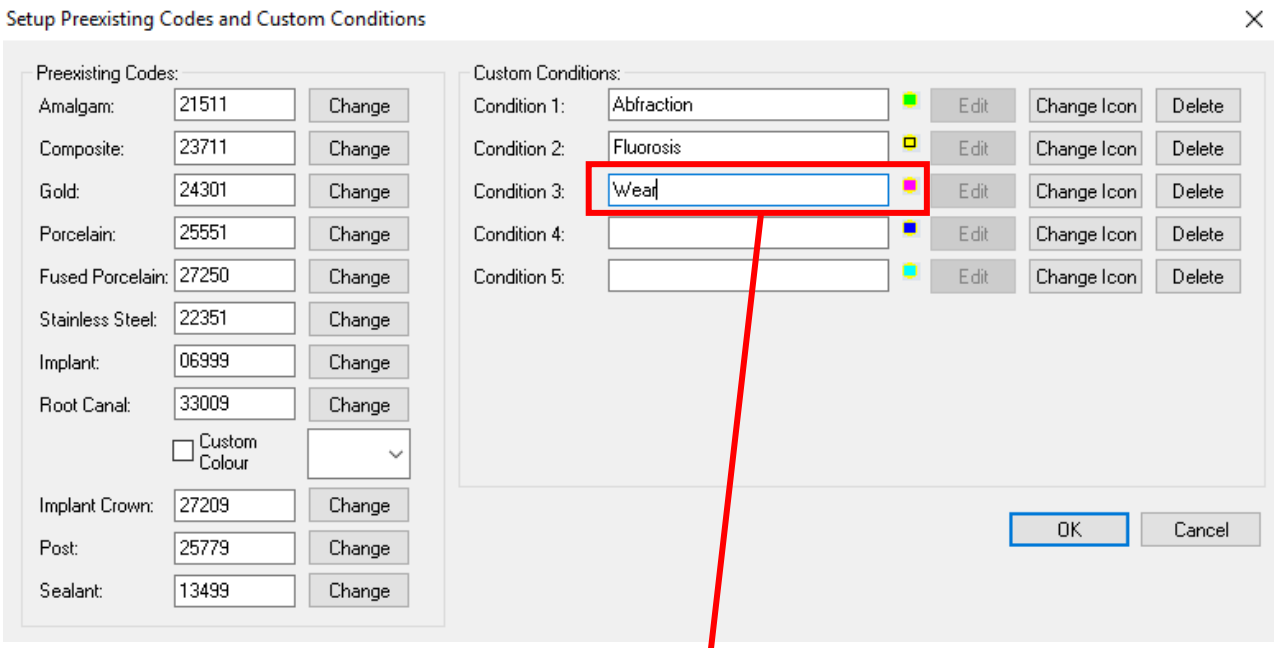
Date	Code	Site	Surf.	Sts.	Prod.	Description
Sep26,15	23322	17	MO	P	D01	PERM MOLAR COMP 2 SURFACE
Feb26,13	33111	42		P	D01	PERM RCT 1 CANAL
Jan15,08	72111	38		P	D01	1SURG EXO W TISSUE INCIS
Jan15,08	23321	46	O	P	D01	PERM MOLAR COMP 1 SURFACE
Jan15,08	27211	42	MIDBL	P	D01	PFM CROWN

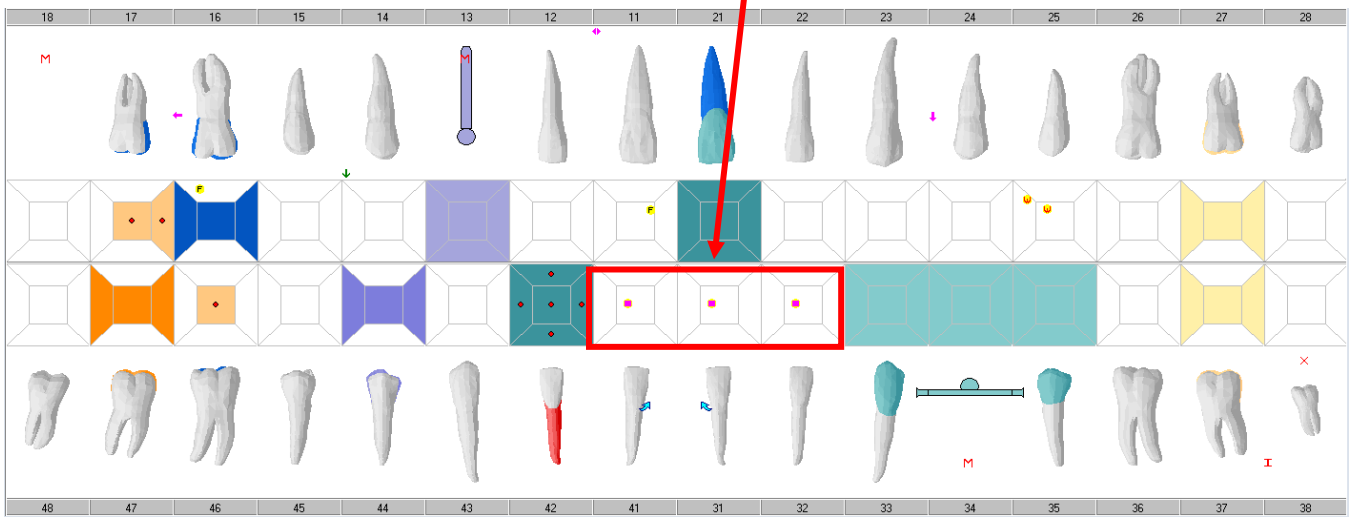
2.3 Setup Custom Conditions

The program allows for 5 customized surface conditions to display on the odontogram. If you change one of the conditions in the future, delete it first to remove it from existing patients, then add the new condition. If you just edit the name it will update all the previous patients you have used it on and will now be an inaccurate condition showing in their charts

To set up the custom conditions:

1. Open the **Conditions Window**.
2. Click on the **Setup** button.
3. Click on the **Edit** button for each available condition.
4. Type in a description of the condition.
5. Click on the **Change Icon** to select the colour of the symbol.
6. Click **Okay** to save.



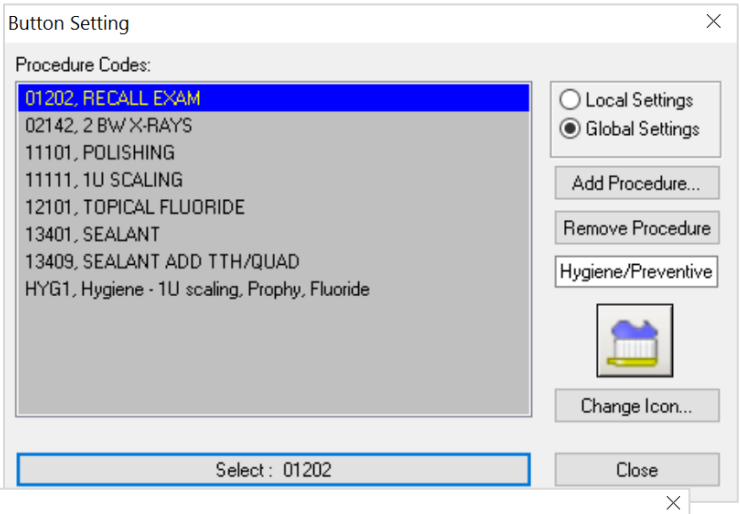


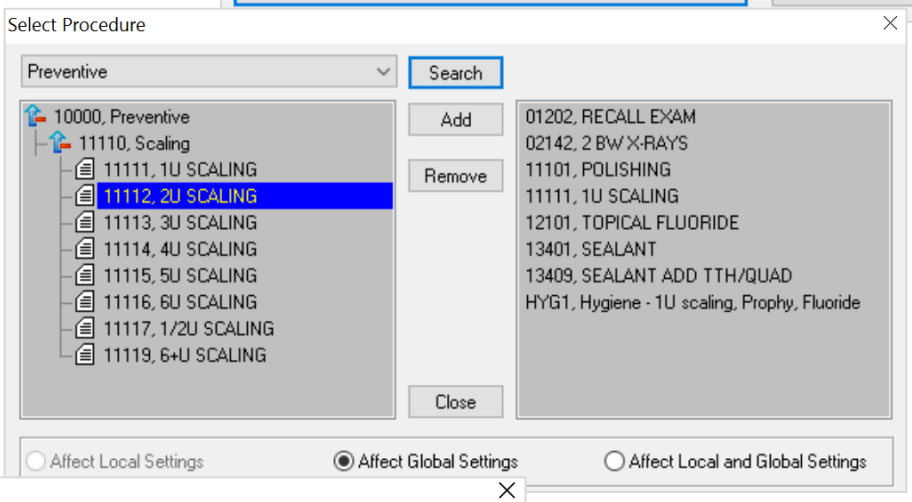
2.4 Customizing the Quick Buttons

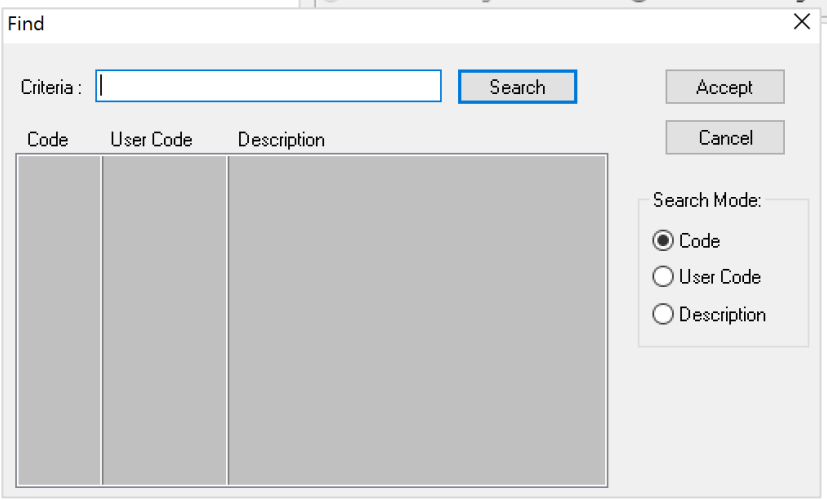
The Quick Buttons can be customized to display the procedure codes that are most frequently used in the office. The Quick Button name and icon can also be customized if the current categories do not suit the procedures most frequently used within the office. The difference between Global/Local Settings is local only changes the login you are using and global will make the change for all Power Practice users.

Adding a procedure to the quick buttons:

1. Left-Click on the button you would like to edit to bring up the **Button Setting** box.
2. Click on the **Add Procedure** button to open the **Select Procedure** dialog box.
3. Click **Search** to find the desired procedure and click **Accept**.
4. Click on the **Add** button.
5. Repeat until all the desired codes have been added to the category.
6. Click **Close** when complete.

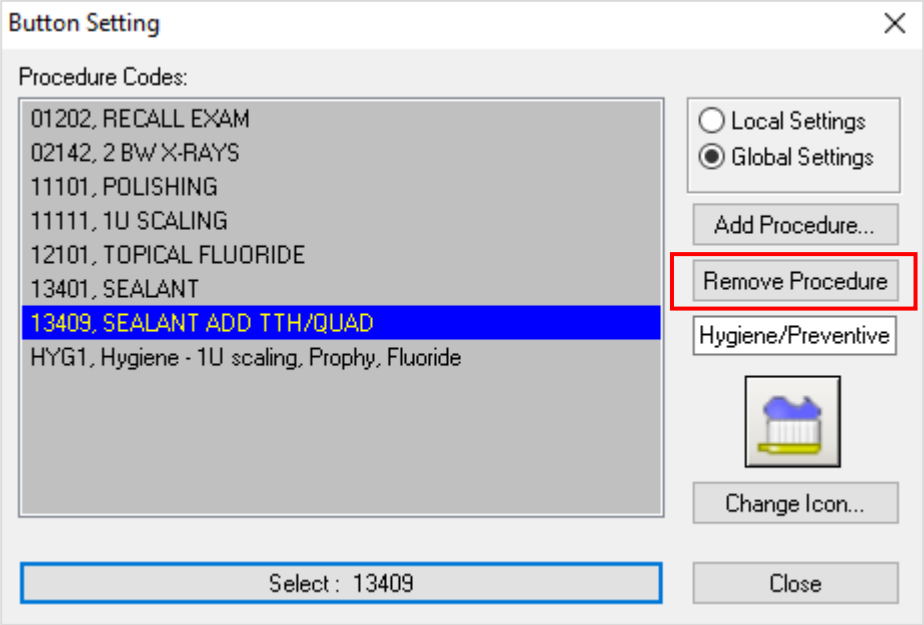






To remove a procedure from the quick buttons:

1. Left-Click on the button you would like to edit to bring up the **Button Settings** box.
2. Select the procedure you wish to remove.
3. Click on **Remove**.
4. Click **Close** when complete.



To edit the name and icon of a quick button:

1. Left-Click on the button you would like to edit to bring up the **Button Settings** box.
2. Delete the current name of the button and type the new category name.
3. Click on the **Change Icon** button to select a new icon from the available icons if desired.
4. Click **Close** when completed.

2.5 Customized Painting of Selected Tooth

The **Paint Tooth** icon allows detailed drawing on a selected anatomical tooth. This feature may be used to draw a more accurate picture of an existing or a completed filling.

After selecting a tooth, click on the **Customize Painting of a Selected Tooth** icon and the following window appears.

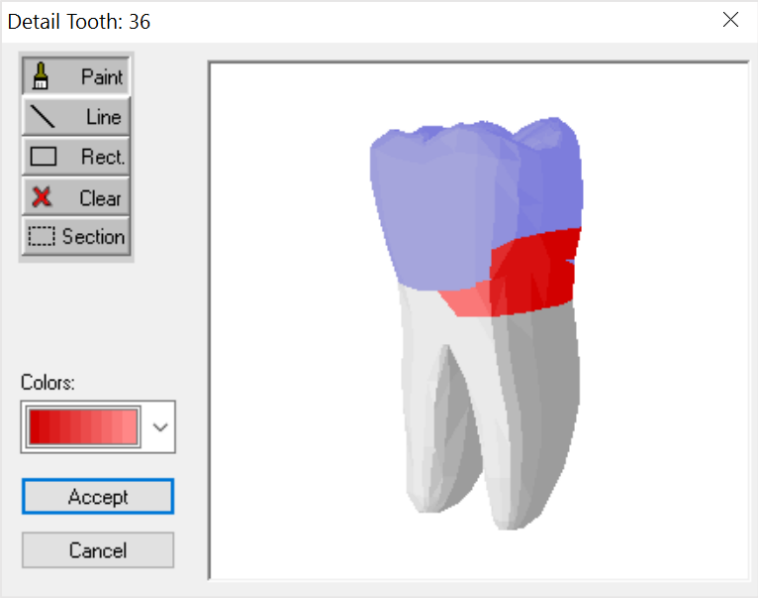
The tooth appears enlarged and the user is able to paint the details as needed.

Right-click on the tooth and drag it to the desired position.

To modify the painting of the tooth:

- Click on the **Paint** option.
- Colour the tooth by dragging the mouse over the area to be coloured.

The tooth can also be coloured using the **Line** or by using the **Rect.**



To clear the colour:

- Click on the **Clear** button to erase where the mouse is clicked.

  or
- Click on the **Section** (allows you to highlight a rectangle section to clear).

To change the colour:

- Click on the colour from the drop down colour area before painting on the tooth surface.

Click **Accept** to save.

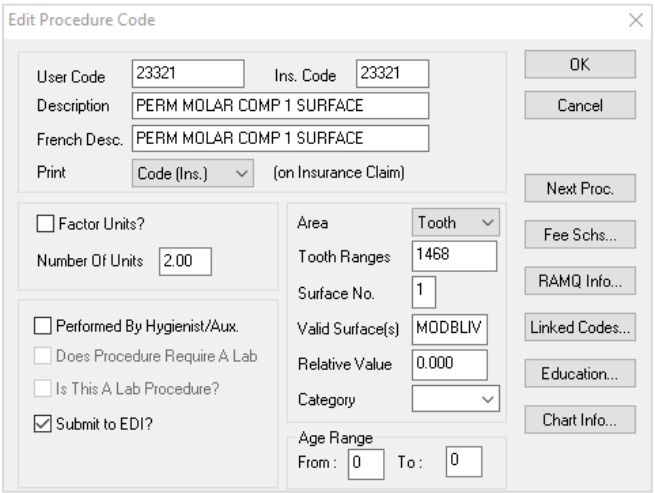
Lesson 3: Procedure Codes

3.1 Editing a Procedure Code Description

Procedure codes can be edited so that the description, or way that it displays in the Odontogram, suits your individual office.

To change the description for all of Power Practice

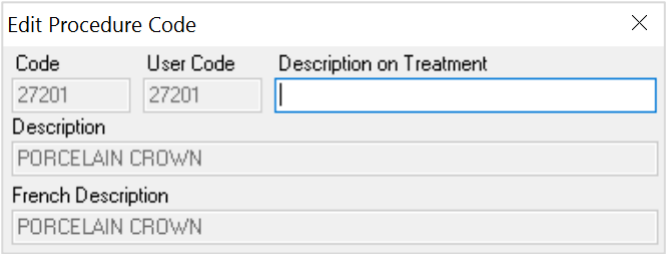
1. Go To **Maintenance Manager > Insurance**.
2. Double Click on the **Procedure Codes** icon.
3. Type the code you want to edit and Click search.
4. Double-Click on the procedure code to open the **Edit Procedure Code** window.
5. Change the **Description** as desired.
6. Click **OK** to save.



To change the description only in the Odontogram

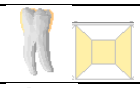
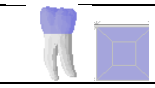
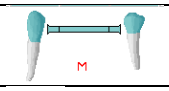
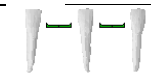
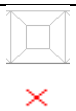
1. Search for the procedure code using the  icon or select it from the Quick Buttons.
2. Double-click on the selected procedure in the procedure code list.
3. The **Edit Procedure Code** box will appear.
4. Type a description in the **Description on Treatment** box.
5. Click **Accept** to save.

Note: Description on treatment will only change the description in chart, it will not change the description that appears in Transactions. To change the description for all of Power Practice including the Odontogram, tooth age, and location you have to edit the procedure codes in Maintenance Manager.

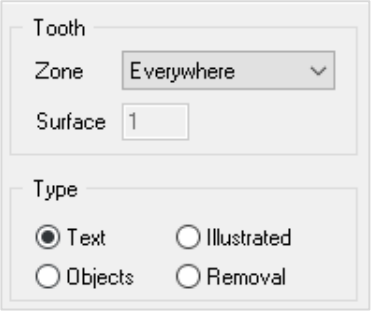


3.2 Editing How a Procedure Code Displays in the Odontogram

You can change how procedure codes display in the odontogram.

Type	Zone	How it displays	Example
Text	Everywhere		
	Surfaces on Crown	Allows you to specify surfaces	
	Root		
	Full Crown		
Illustrated	Everywhere	Does not display in the odontogram	
	Surfaces on Crown	Colours the surfaces that you have selected	
	Root	Colours the root of the tooth that you have selected	
	Full Crown	Colours the full crown of the tooth that you selected	
Objects	Unknown	Does not display in the odontogram	
	Bridge	Colours the full crown of the abutments and places a bar connecting them	
	Implant	Places a coloured implant in the missing space	
	Retainer Bar	Places a thin coloured bar in between the teeth selected	
	Pontic	Places a coloured circle where the pontic is	
	Partial Denture	Does not display in the odontogram	
	Full Denture	Does not display in the odontogram	
	Denture Repair	Does not display in the odontogram	
	Post	Displays a coloured post on top of the root	
	Pin	Does not display in the odontogram	
Removal	All Selections	Removes tooth from odontogram and adds a red “x”	

To change how a procedure code displays on the odontogram



1. Search for the procedure code or select it from the quick buttons.
2. Double-click on the selected procedure in the procedure code list.
3. The **Edit Procedure Code** box will appear.
4. Select the **Colour, Type**, and **Zone.**
5. Click **Accept** to save.

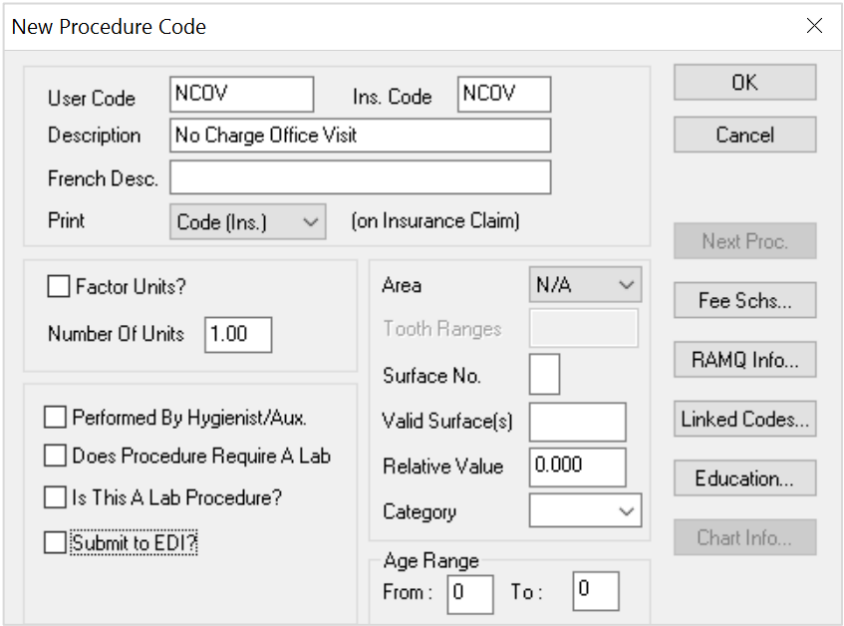
Note: Do not change the “Level” classification. This refers to where it appears in the procedure tree and if changed it will have to be fixed by support.

3.3 Creating a New Procedure Code

There are occasions where you may require a unique procedure code that is not in Power Practice but you would like it to display in the Patient History. These can be entered with the help of support.

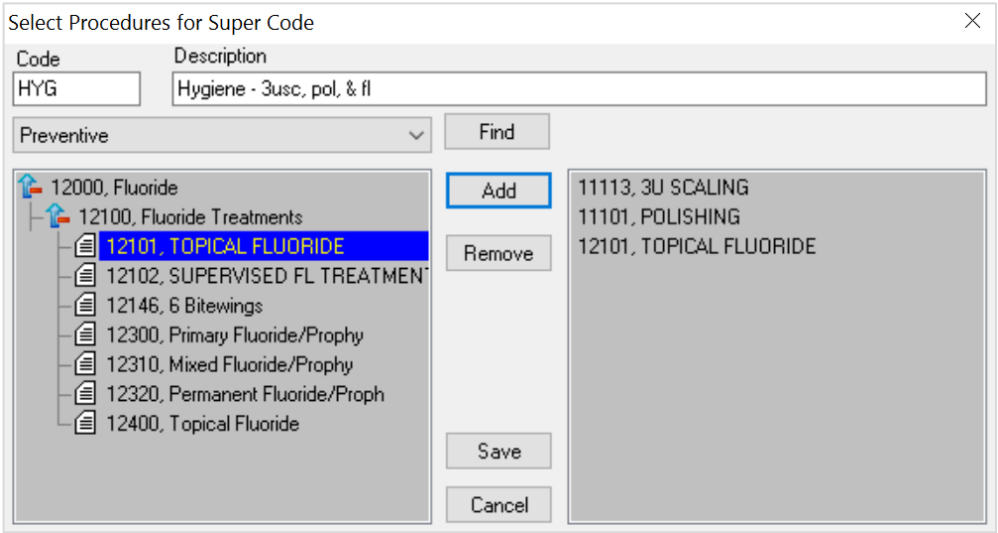
Examples of codes that have been created are:

- No Charge Impressions – This gives you the ability to post the visit to the patient history for appointments where nothing is billed.
- Ortho Watch – Was created so that when the office was watching a patient for prospective orthodontic treatment they didn't have to add the regular watch icon to every tooth.



3.4 Creating Super Codes

A Super Code is a group of linked treatment codes that would be performed in conjunction with each other by a producer. When entering Super Codes all the procedures must have the same producer.



To create a super code:

1. Click on the **Charting** option from the menu bar.
2. Select **Procedure Code Settings**.
3. Click on the **Super Code** button to have the **Select Procedures for Super Code** dialog box appear.
4. Create and type in a procedure code into the code field (alpha or numeric).
5. Type in a **description** for the Super Code.
6. Click **Find** to search for the procedure code.
7. Select the procedure code desired.
8. Click add and the procedure will be listed on the right.
9. Repeat steps 6-8 until all codes have been added.
10. Click **Save** once completed.

To remove a selected procedure from a super code:

1. Click on the **Charting** option from the menu bar.
2. Select **Procedure Code Settings**.
3. Click on the **Super Code** button to have the **Select Procedures for Super Code** dialog box appear.
4. Click on the **Super Code** that you would like to remove a code from and select **Edit**.
5. Select the item on the right and click **Remove**.

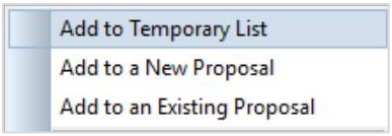
Once the Super Code is created it will have to be added to the Quick Buttons.

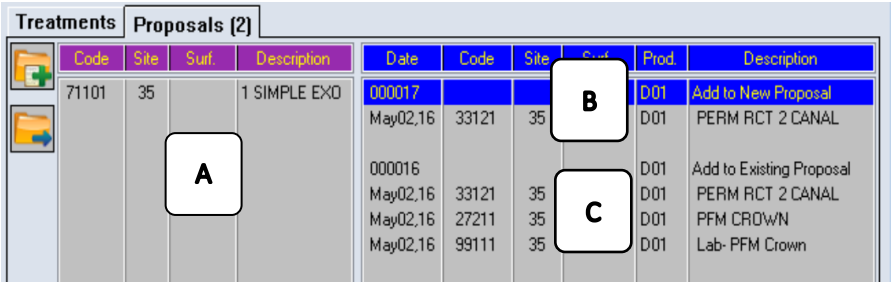
Lesson 4: Treatment Proposals

The Treatment Proposal module can be used for treatment options. Treatment Proposals can be created from the Odontogram or from the Treatment Proposals module. The proposals are generally used to put in treatment options when patients are unsure of which treatment plan they are going to choose, but can also be used for all treatment that requires an estimate, pre-authorization, or consult. If there are current treatment proposals you will see a number beside the Proposals heading that represents how many proposals are listed for the current patient.

4.1 How to Create a Proposal in Power Chart

1. In the **Odontogram**, select the **Proposals** tab above the history listing box, beside the Treatments tab.
2. Choose the procedures you want to post to proposals the same way you choose them to enter treatment (Search or Quick Buttons).
3. Where applicable, select the tooth and/or any tooth surfaces for the procedure.
4. Select the provider who will be performing the treatment if you are not using the **Transactions Settings** default Dr in options.
5. Right-click on the **Odontogram** and choose one of three actions:
   a. **Add to Temporary List** – adds the procedure to the left hand side under the purple section. Use these for creating different combinations of treatment.
   b. **Add to New Proposal** – add the procedure to the right hand side under the blue section as a new proposal.
   c. **Add to Existing Proposal** – will add the procedure to the proposal you have highlighted on the right hand side under the blue bar.





If using the **Temporary** list, once you add all the treatment to the list,

1. Highlight the treatment(s) that will be one proposal and select the **Create New Proposal** icon (or right click menu.
2. Do this for each different proposal option offered to the patient.
3. If you forget a procedure you can select it from the temporary list, select the proposal to add to, and select **Add to an Existing Proposal** from the right-click menu.

Once you have entered all the proposals you can double click on the proposal heading to add a rating and title for the different options. We also recommend that you put the units of time in the heading so if the patient decides to schedule, your receptionist does not need to ask how long will be needed for the appointment.

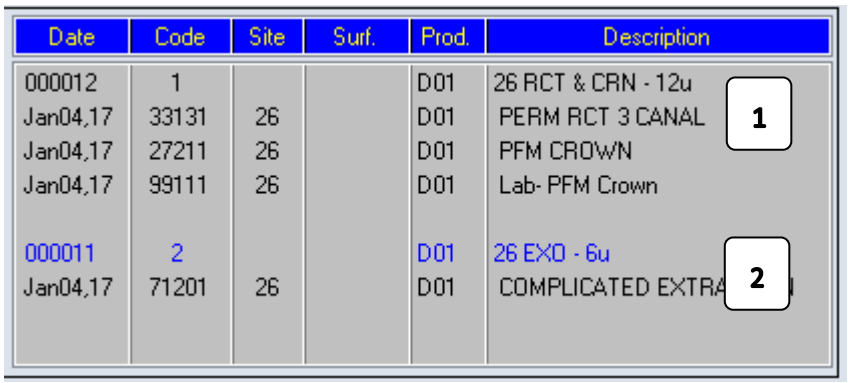
Note: Treatment that is entered as a proposal will not go through checkout like planned and completed treatment. You will need to right-click and select **Send a Message** from the menu to let reception know that there is new treatment proposals for the patient.

4.2 Proposal Statuses

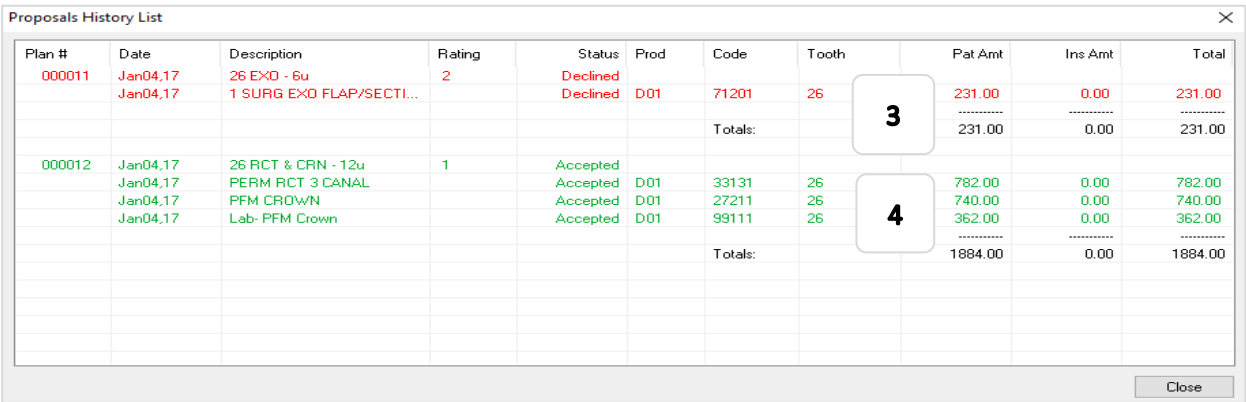
The statuses of proposals can be changed to accurately reflect the patient's decisions. These statuses can be managed by clinical staff or reception. It is important to know what they mean and how to find them so that you can have accurate and cohesive conversations about treatment options with your patients. There are four statuses**: New, In Review, Declined**, and **Accepted**. Proposals that are **New** and In **Review** will show in the proposal section. Proposals that have been **Accepted** or **Declined** can be viewed in the Proposal History.

1. **New** – Has been added but not reviewed with patient. Text is black.
2. **In Review** (presented but no decision made) - Has been discussed with patient and patient has all required info to make a decision (estimate, info sheet, etc.). The proposal will remain as is but the text turns blue.
3. **Declined** - The proposal will be removed from the **Proposals** tab and the proposed claim shows in red under the **Proposal History**.
4. **Accepted** - The proposal will move to **Planned Treatment**. A copy of the accepted proposal shows under the **Proposal Histor**y in green.

Note: To view the **Proposal History**, right-click in the proposal area of the odontogram and select **View Proposal History**.



Date	Code	Site	Surf.	Prod.	Description
000012	1			D01	26 RCT & CRN - 12u
Jan04,17	33131	26		D01	PERM RCT 3 CANAL
Jan04,17	27211	26		D01	PFM CROWN
Jan04,17	99111	26		D01	Lab- PFM Crown
000011	2			D01	26 EXO - 6u
Jan04,17	71201	26		D01	COMPLICATED EXTRA

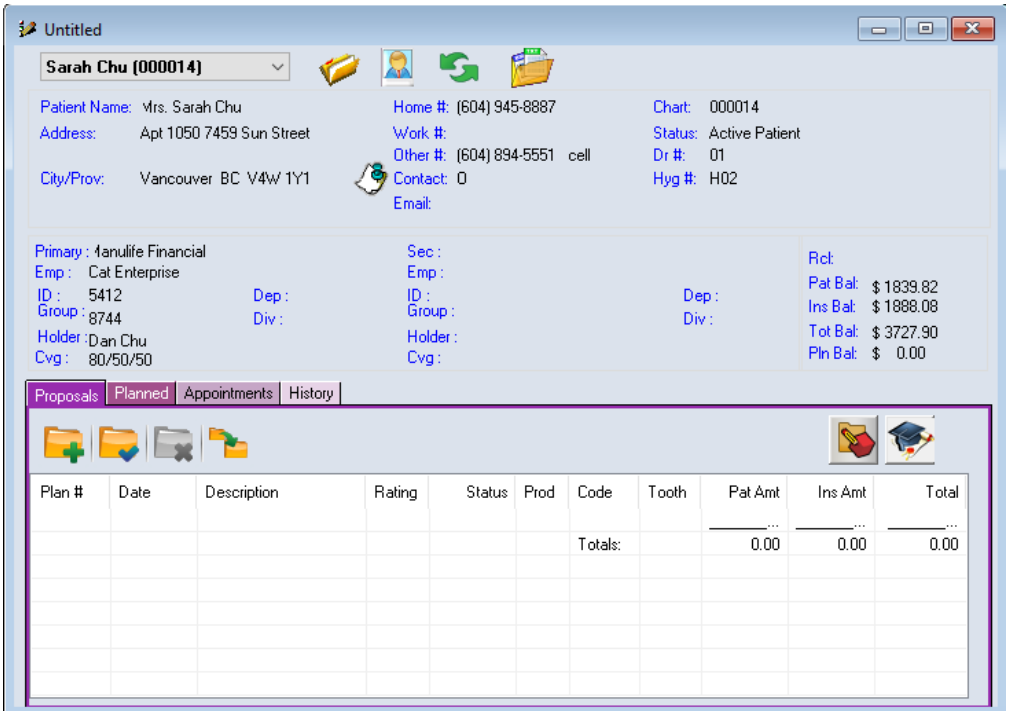


Proposals History List

Plan #	Date	Description	Rating	Status	Prod	Code	Tooth	Pat Amt	Ins Amt	Total
000011	Jan04,17	26 EXO - 6u	2	Declined						
	Jan04,17	1 SURG EXO FLAP/SECTI...		Declined	D01	71201	26	231.00	0.00	231.00
						Totals:		231.00	0.00	231.00
000012	Jan04,17	26 RCT & CRN - 12u	1	Accepted						
	Jan04,17	PERM RCT 3 CANAL		Accepted	D01	33131	26	782.00	0.00	782.00
	Jan04,17	PFM CROWN		Accepted	D01	27211	26	740.00	0.00	740.00
	Jan04,17	Lab- PFM Crown		Accepted	D01	99111	26	362.00	0.00	362.00
						Totals:		1884.00	0.00	1884.00

4.3 Treatment Proposals Module

The Treatment Proposals module is used for treatment management. You can print Pre-Auth forms to submit to insurance and print estimate letters for the patient to review, as well as add new proposals or edit existing ones.



Proposals

This tab allows you to see all the New and In Review treatment proposals. You can edit proposals or add new proposals using the right click menu.

Planned

This tab shows all planned treatment the patient has just like the **Transactions** module does. Access the right-click menu for options related to planned treatment.

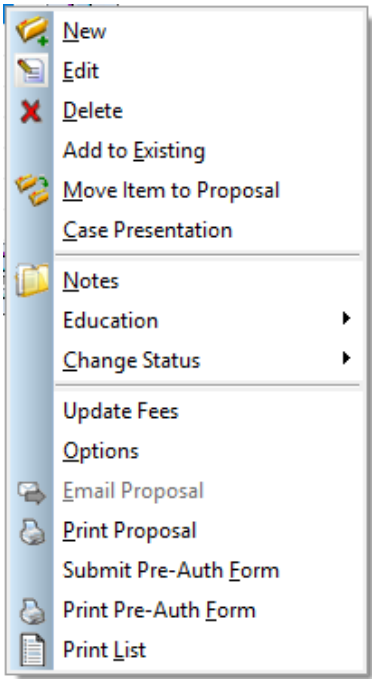
Appointments

This tab shows a list of the patient's appointment history. Access the right-click menu for options related to the appointments.

History

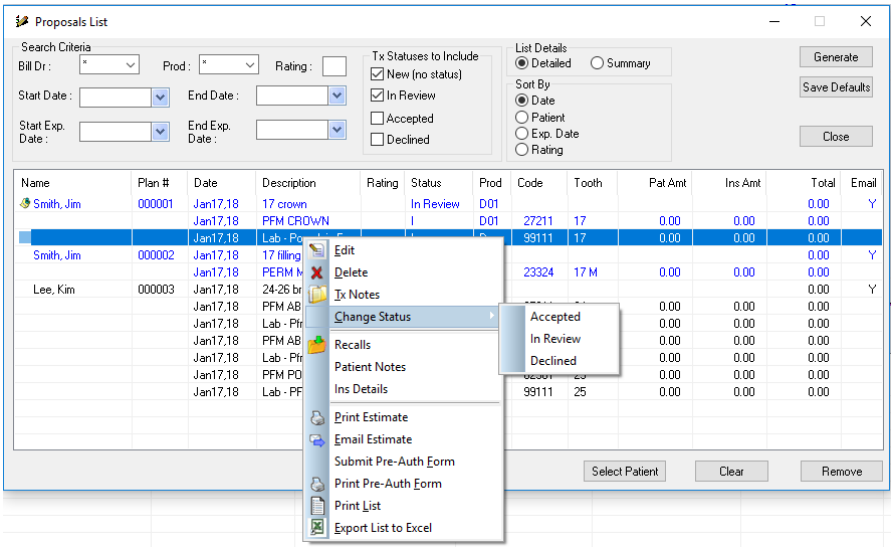
This tab shows a history of the proposals. Red for Declined, Green for Accepted.

Right Click Menu Options



- **New**-create a new proposal.
- **Edit**-make changes to the highlighted line of treatment or proposal.
- **Delete**-delete the highlighted line or proposal.
- **Add to Existing**-add more treatment to the highlighted proposal.
- **Move Item to Proposal**-move the highlighted treatment to a different proposal.
- **Case Presentation**-create or edit phase and appointment information.
- **Notes**-add or edit a note, treatment or proposal.
- **Education**
    - **Play Video**-play a short automated video of the highlighted procedure.
    - **Print Leaflet**-informational sheet on the highlighted procedure.
- **Change Status**
    - **Accepted** – The proposal will move to the **Planned** tab. A copy of the accepted proposal shows under the **Histor**y tab in green. The claim will also appear within the **Planned Treatment** area in the **Transactions** module.
    - **In Review** (presented but no decision made) – The proposal will remain as is but turns blue.
    - **Declined** – The proposal will be removed from the **Proposals** tab and the proposed claim shows in red under the **History** tab.

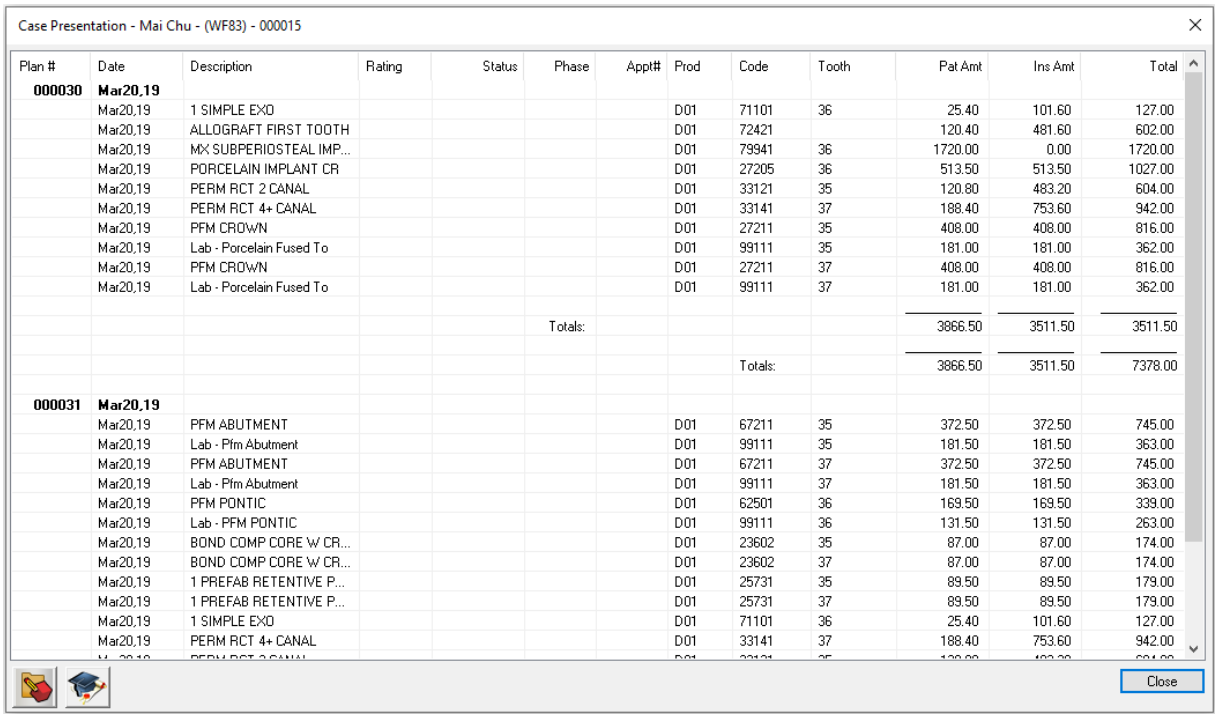
  NOTE: *This **History** tab can be purged by right clicking and selecting Purge.*
- **Options-Show Treatment Flow Screen After Accepting Proposal.**
- **Email Proposal-**email the patient a copy of the proposal.
- **Print Proposal**-print a copy of the proposal.
- **Submit Pre-Auth Form**-submit form electronically to insurance.
- **Print Pre-Auth Form**-Print form for insurance.
- **Print List**-print the Proposals on one page as a list.



4.4 Case Presentation

Use **Case Presentation** to further organize and prepare information such as **Phase Orders** and appointment break down for each proposal created. **Case Presentation** is available from **Power Chart** and from the **Treatment Proposal** module.

Note: *Clicking on the **Case Presentation** icon will show all proposals. To focus on one proposal, use the **Treatment Proposal** module, select the proposal to work on, and right click **Case Presentation**.*

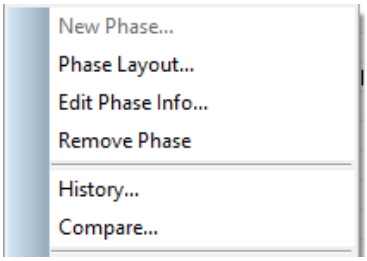


Case Presentation - Mai Chu - (WF83) - 000015

Plan #	Date	Description	Rating	Status	Phase	Appt#	Prod	Code	Tooth	Pat Amt	Ins Amt	Total
000030	**Mar20,19**											
	Mar20,19	1 SIMPLE EXO					D01	71101	36	25.40	101.60	127.00
	Mar20,19	ALLOGRAFT FIRST TOOTH					D01	72421		120.40	481.60	602.00
	Mar20,19	MX SUBPERIOSTEAL IMP...					D01	79941	36	1720.00	0.00	1720.00
	Mar20,19	PORCELAIN IMPLANT CR					D01	27205	36	513.50	513.50	1027.00
	Mar20,19	PERM RCT 2 CANAL					D01	33121	35	120.80	483.20	604.00
	Mar20,19	PERM RCT 4+ CANAL					D01	33141	37	188.40	753.60	942.00
	Mar20,19	PFM CROWN					D01	27211	35	408.00	408.00	816.00
	Mar20,19	Lab - Porcelain Fused To					D01	99111	35	181.00	181.00	362.00
	Mar20,19	PFM CROWN					D01	27211	37	408.00	408.00	816.00
	Mar20,19	Lab - Porcelain Fused To					D01	99111	37	181.00	181.00	362.00
					Totals:					3866.50	3511.50	3511.50
								Totals:		3866.50	3511.50	7378.00
000031	**Mar20,19**											
	Mar20,19	PFM ABUTMENT					D01	67211	35	372.50	372.50	745.00
	Mar20,19	Lab - Pfm Abutment					D01	99111	35	181.50	181.50	363.00
	Mar20,19	PFM ABUTMENT					D01	67211	37	372.50	372.50	745.00
	Mar20,19	Lab - Pfm Abutment					D01	99111	37	181.50	181.50	363.00
	Mar20,19	PFM PONTIC					D01	62501	36	169.50	169.50	339.00
	Mar20,19	Lab - PFM PONTIC					D01	99111	36	131.50	131.50	263.00
	Mar20,19	BOND COMP CORE W CR...					D01	23602	35	87.00	87.00	174.00
	Mar20,19	BOND COMP CORE W CR...					D01	23602	37	87.00	87.00	174.00
	Mar20,19	1 PREFAB RETENTIVE P...					D01	25731	35	89.50	89.50	179.00
	Mar20,19	1 PREFAB RETENTIVE P...					D01	25731	37	89.50	89.50	179.00
	Mar20,19	1 SIMPLE EXO					D01	71101	36	25.40	101.60	127.00
	Mar20,19	PERM RCT 4+ CANAL					D01	33141	37	188.40	753.60	942.00

Close

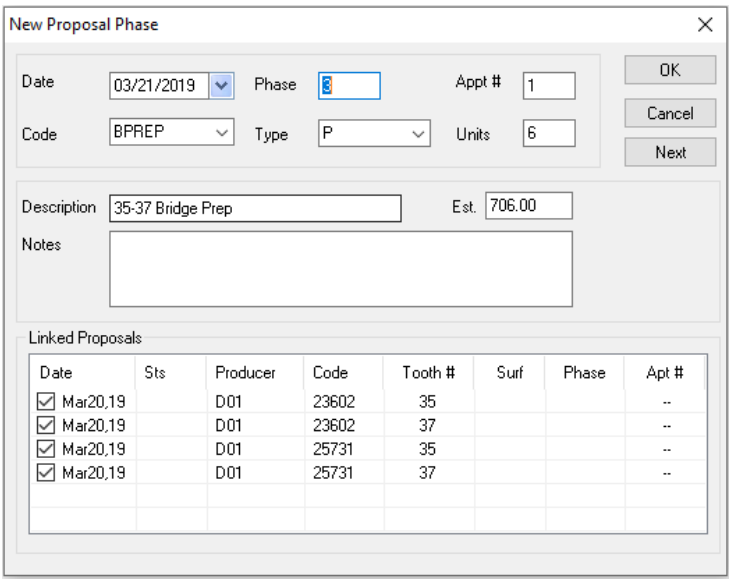
Additional Right Click Menu Items



New Phase	Creates a new phase for highlighted items.
Phase Layout	Reorganize procedures within the proposal.
Edit Phase Info	Edit phase number and appointment details.
Remove Phase	Removes phase information.
History	View procedures accepted and declined within a proposal.
Compare	Side by side comparison of two proposals.

How to Create a Phase

1. Highlight the procedures to include in a phase and right click **New Phase.**
2. Fill in the criteria and link the procedures for each appointment within the phase.
3. Click **Next** to continue creating the next appointment, changing the criteria as required.
4. Click **OK** after each phase.

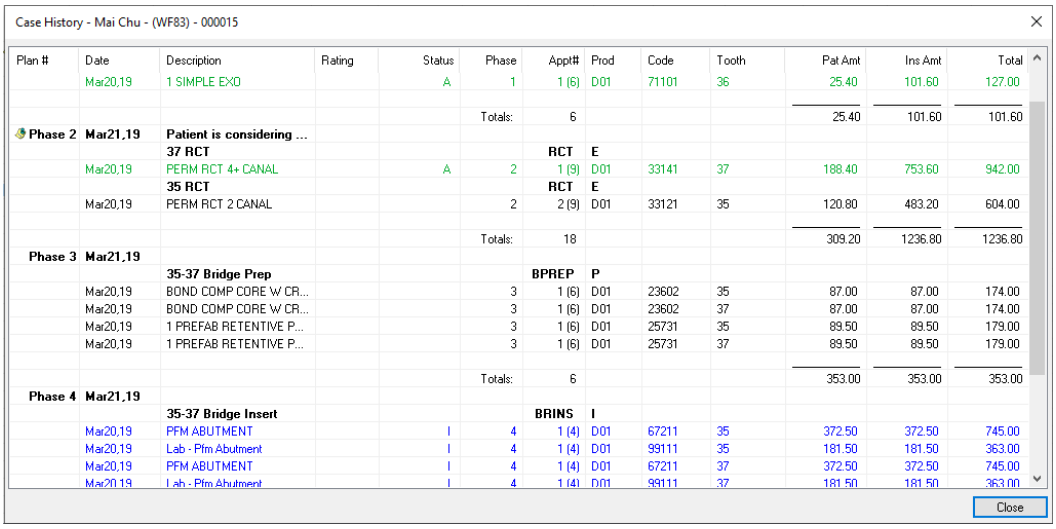


How to Edit a Phase

Edit phase information by right clicking on the phase and selecting **Edit Phase Info**. A note can be added to each phase and will copy to all appointments within the phase (which will be carried forward to planned appointment).

Proposed Procedure Statuses

Change individual procedure statuses to **In Review**, **Accepted**, or **Declined** by highlighting the procedures, right clicking, and selecting **Change Status**. To change the status for the entire phase, right click on the **Phase Title** line or **Appointment Code** line and right click **Change Status**.

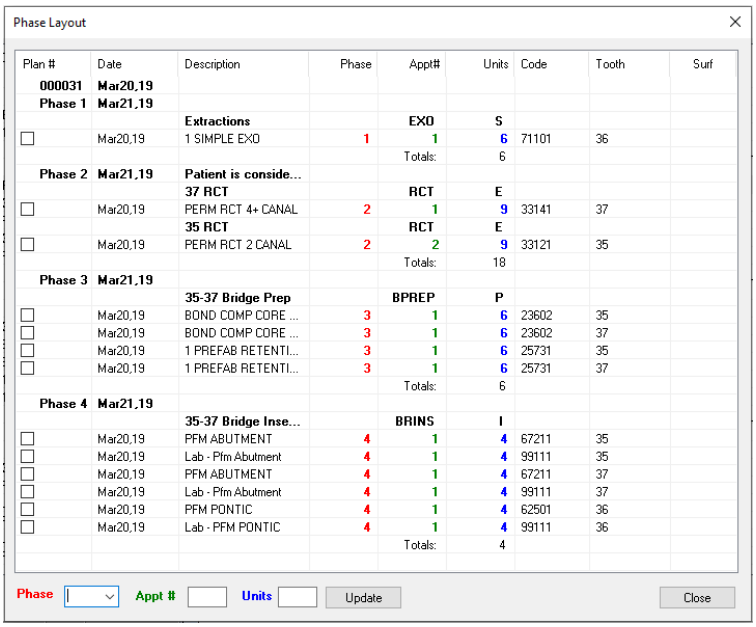


Right click on the proposal and click **History** to view case acceptance status.

How to Use Phase Layout

Use **Phase Layout** to reorganize procedures in phases, appointments, and update units at any time.

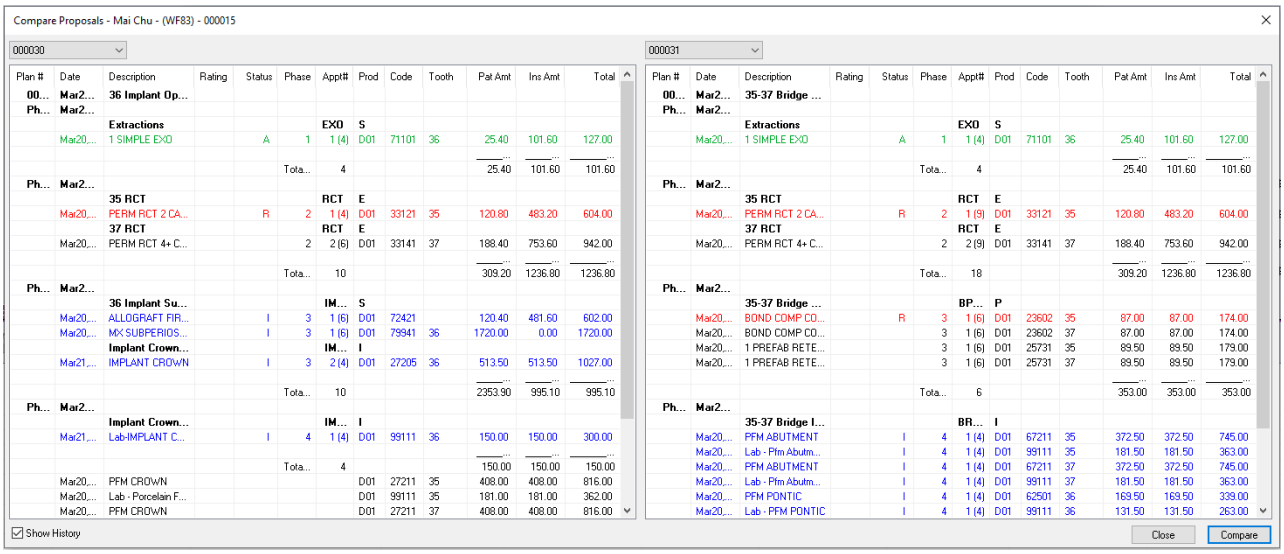
1. Right click in **Case Presentation** and select **Phase Layout**.
2. Click on the tick box beside the procedures to move.
3. Fill in desired criteria and click **Update**.



Proposal Comparison

Compare two proposals side by side by right clicking and selecting **Compare**.

1. Click on each dropdown and choose two proposals to compare.
2. Select the **Show History** button to view procedure acceptance statuses.
3. Click **Compare**.

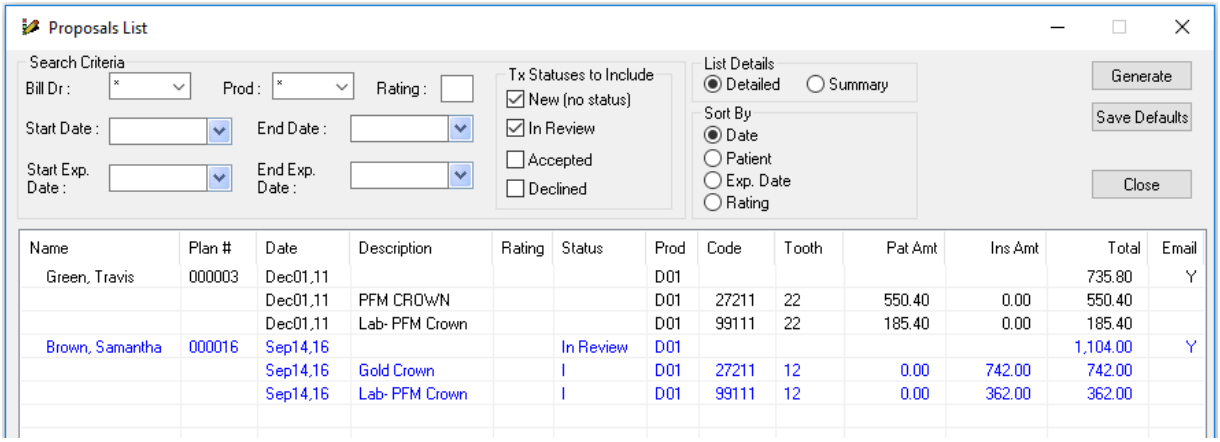


4. Right click for print options.

4.5 Interactive Proposals List Report

The **Treatment Proposals** module has an interactive **Proposals List** that will search for proposed treatments for all patients based on search criteria involving the **Doctor, Date Range,** and **Status** of the proposal. Using this report will help to effectively remain on top of treatments that have been proposed.

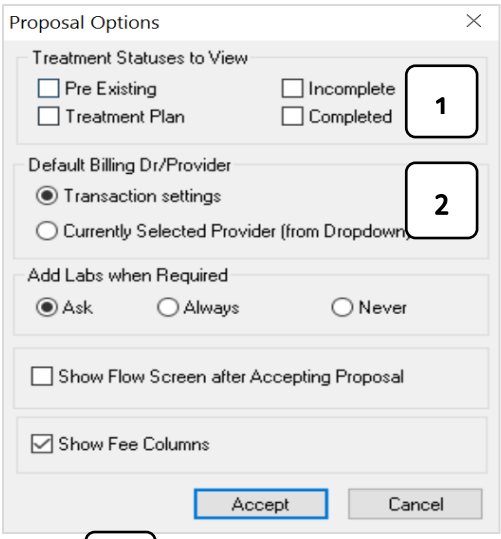
This report can be run as often as needed, and sorted by the Proposal **Date**, **Patient** or **Exp. Date** in order to prioritize the results. A right-click menu provides other functions that will help with managing the proposals.

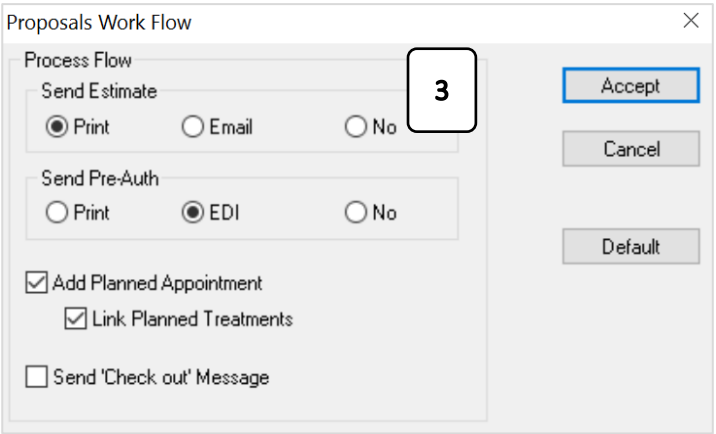


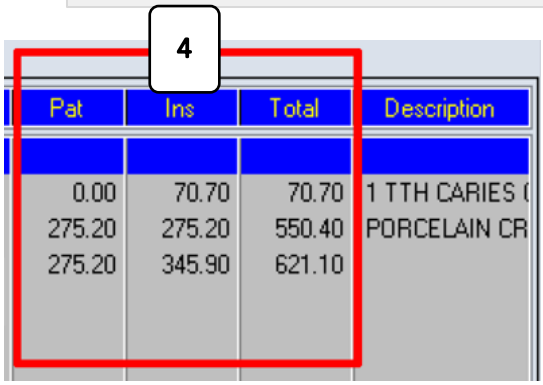
4.6 Proposal Options in the Odontogram

The **Options** on the right click menu of the proposal area will bring up the **Proposal Options.**

1. Choose which treatment statuses you want to view along with treatment proposals.
2. You have an option for **Default Billing Dr/Provider.** The default is Transactions settings.
3. You can **Show Flow Screen after Accepting Proposal**. This will automatically take you through all the steps listed.
4. You can **Show Fee Columns** on the proposals tab.





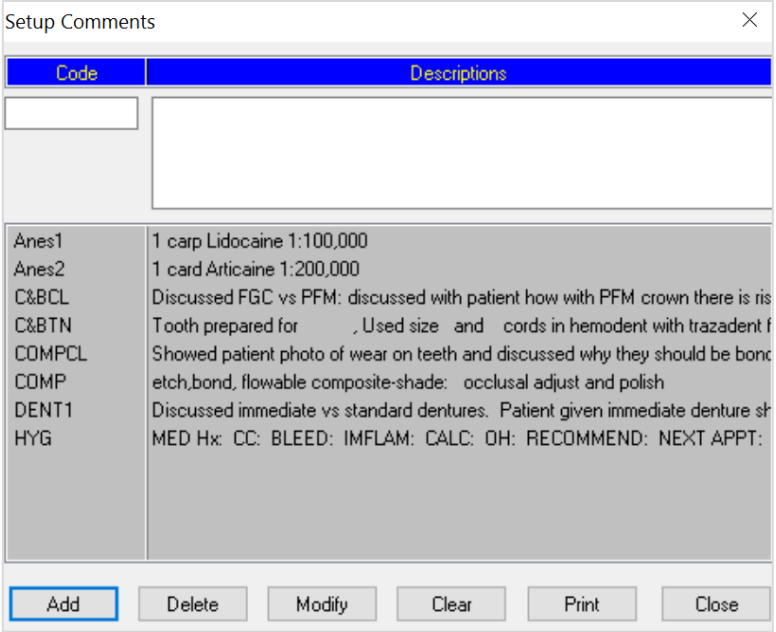


Lesson 5: Notes

5.1 Creating Comment Templates

Comment templates can be set up for frequently used comments. The templates will reduce the amount of time you spend typing notes.

1. From the **Charting** menu, select **Comments Setup** to open the **Setup Comments** window.
2. Type in a code and a description.
3. Click **Add**.
4. Click **Close** when finished.



If you want to delete or modify a comment:

1. Click on the line and make the desired changes.
2. Click **Modify** or **Delete** as needed.

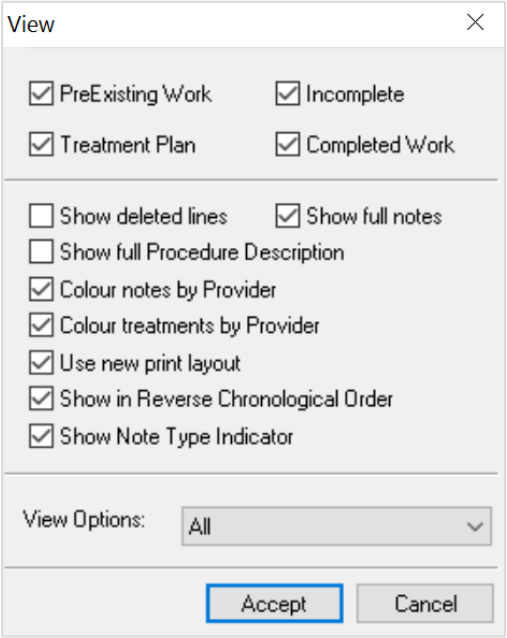
5.2 View Options

The user can adjust what is displayed on the Patient History screen.

Here the user can:

- Select which status of treatment to display.
- Select to show deleted lines.
- Select to view full notes. Unselected shows only the first line.
- Select to show the full procedure description.
- Select to colour the notes and/or treatment by producer.
- Show Note Type Indicator.
- Select from dropdown to view **All** notes, **Show Clinical Notes**, or **Show Office Notes**.

Clicking **Accept** will save the selections made.

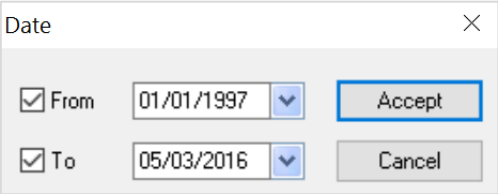


5.3 View a Specific Date Range

See the entire history or a specific date range.

To view a selected time frame:

1. Click on the **Select Date Range** icon.
2. Click on the **From** and **To** boxes.
3. Enter the start and end dates to view.
4. Click **Accept**.



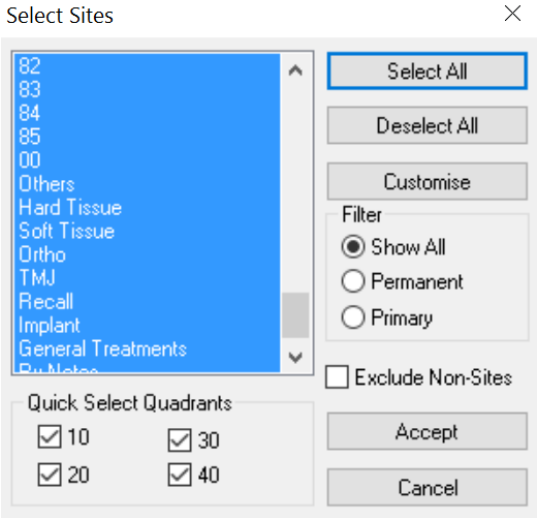
Remember to deselect the **From** and **To** boxes to set the view back to all dates.

5.4 View Specific Sites

This allows the user to view only a selected site or area on the Patient History screen. This is useful when the user wants to focus on a particular tooth/quadrant and only view the treatment entered for that area.

Choose the sites to display by several methods:

- **Select All** will select all sites.
- **Deselect All** will unselect all sites.
- Click on the specific tooth numbers or conditions to show.
- **Filter** by age selects only permanent or primary tooth sites.
- **Quick Select Quadrants** selects all teeth in that quadrant.



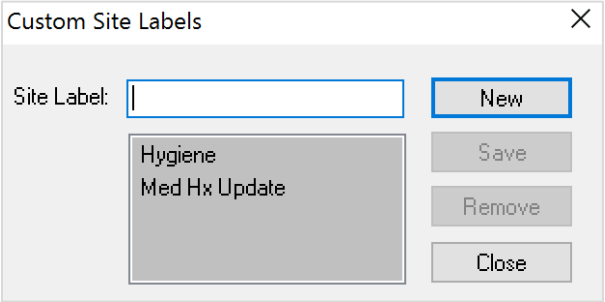
Note: When looking for a specific site, clicking **Exclude Non-Sites** will ensure that non-site specific treatment and notes do not show up in the search.

Select a specific site:

1. Click on the **Select Site** icon.
2. Click the **Deselect All** button.
3. Click on the **Exclude Non-Sites** button if you would prefer.
4. Click on the site(s) from the list that you would like to see.
5. Click **Accept.**

Remember to go back and click **Select All**, deselect **Exclude Non-Sites**, and click **Accept** to view all sites again.

5.5 Create custom sites:



You can create up to 10 Custom Site Labels that you can use to tag your clinical notes as.

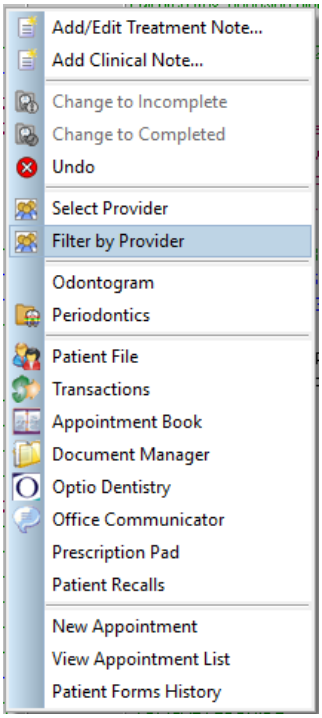
1. Click the **Customize** button.
2. Type the **Site Label.**
3. Click **New.**
4. Click **Accept.**
5. Click **Select All** to include the new site.

5.6 Filter by Provider

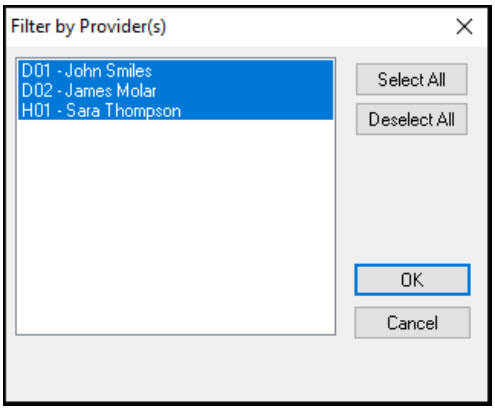
Filter Treatments by Provider

The **Treatments** tab in the **Odontogram** and the **Patient History** can be filtered to show treatments posted under specific producers. This filter will be in place if the window remains open. Once the **Odontogram** or the **Patient History** windows are closed and reopened, the filter will return to its original settings.

To Filter by Provider:



1. Right click on either the **Odontogram** or the **Patient History**.
2. Select **Filter by Provider**.
3. Highlight the Providers you would like to show.
4. Click **OK**.

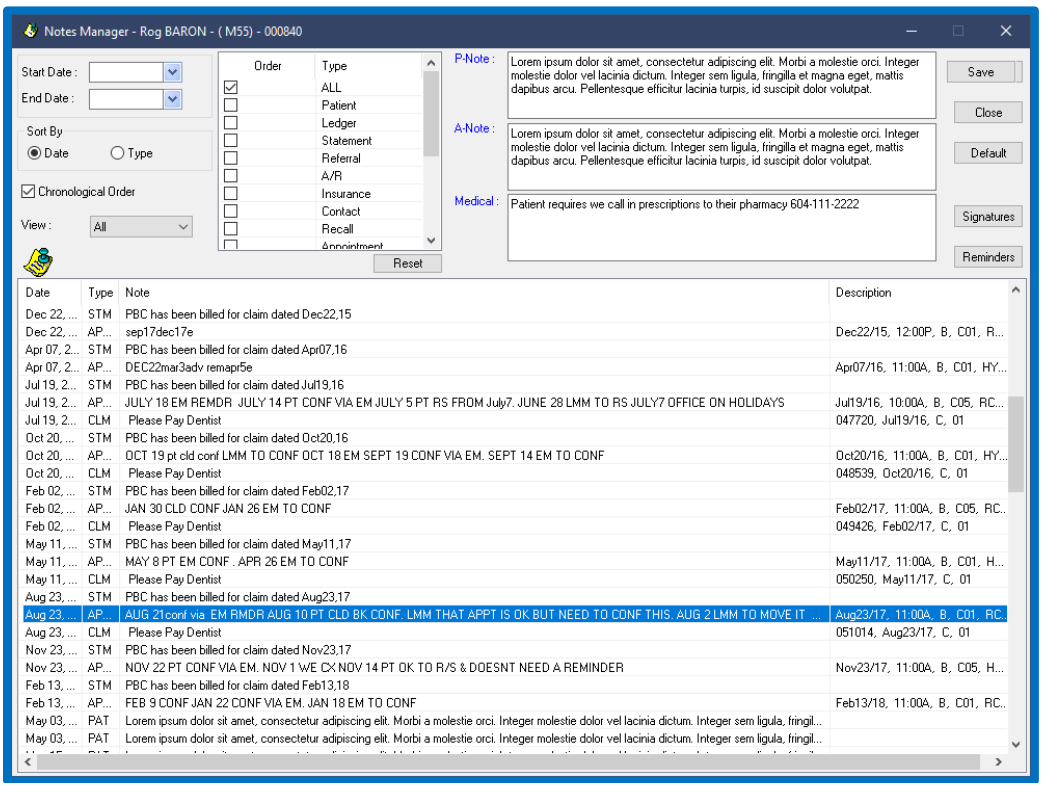


Lesson 6: Notes Manager

6.1 Notes Manager

Online Video: Version 5 - Power Practice (Discussed in the 5.0 New Module and Patient Enhancements video)

Added in version 5.0, the Notes Manager module is a new, centralized location for tracking patient notes.



This module will allow you to search for notes by date and type, as well as presenting the P-note, A-note and Medical notes by default. The date fields are available in the upper left, accompanied by the tick boxes representing all the different note types available across the program.

It is a rather straightforward and simple to use module, but the video linked above will cover all the options available in much more detail if you would like to find out more.

Signatures

Available on the far-right side, the Signatures button will link you to the new Signature Manager Report, another new addition from 5.0. You can read up on it by following any of the articles linked below:

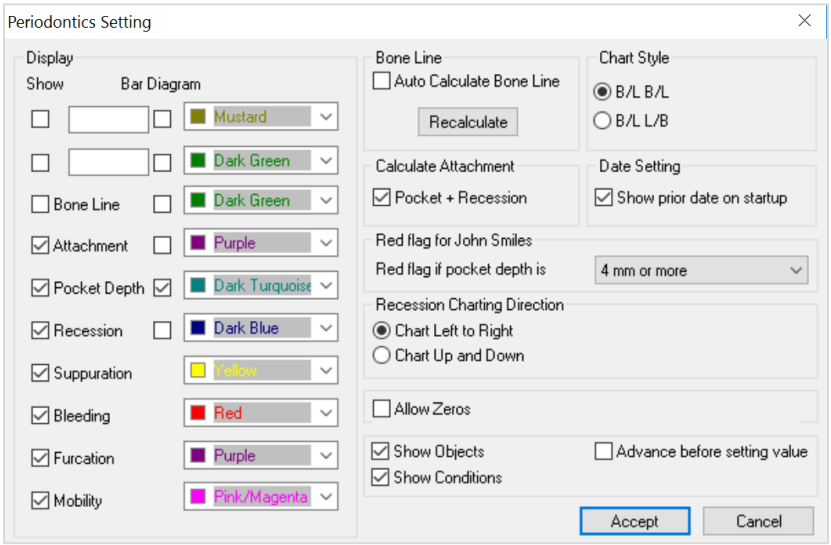
Setup Digital Signatures - Power Practice
Creating User Signatures - Power Practice
Signatures Report - Power Practice
Use Digital Signatures on Clinical Notes - Power Practice
Mark Notes for Review - Power Practice

Lesson 7: Periodontal Charting

7.1 Customizing Readings

Power Practice allows for the recording of several periodontal conditions as well as two customizable recordings. To change the conditions that are currently being recorded:

1. In the **Periodontics** window, click on the **Setting** icon.
2. Select which perio conditions are to be charted and displayed by ticking the **Show** boxes beside each condition.
3. Select the display colour from the dropdown for each perio condition.
4. There are two custom boxes to add readings such as MGJ, plaque, or percussion by typing in the box.
5. **Bar Diagram** can be checked if the provider wishes to show readings with a vertical line.
6. Click **Accept** to save.



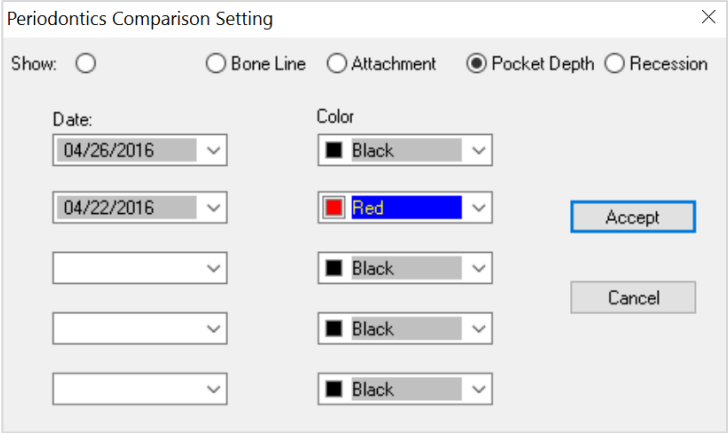
7.2 Understanding Settings

- **Turn** the **Auto Calculate** on or off for bone line readings.
- **Chart style** allows for the charting order to progress in one of two ways: B18-28, L28-18, B48-38, L38-48 or B18-28, L28-18, L48-38, B38-48.
- **Red Flag if pocket depth is _mm or more** will change the number/bar displayed to red if the depth is greater than a specific number.
- **Calculate Attachment** calculates automatically by adding the pocket depth and the recession reading.
- The user can select to have the previous readings loaded when they open the perio chart or they can start from a blank screen.
- **Recession Charting Direction** can be changed to allow the readings to be taken the same time as the probing (up and down) or on its own (left to right).
- **Allow Zeros** on the chart will show zeros instead of just blank readings.
- **Advance before setting value** changes the timing of the curser advances when recording.
- **Show Objects** and **Show Conditions** will display the conditions and objects currently posted on the odontogram.

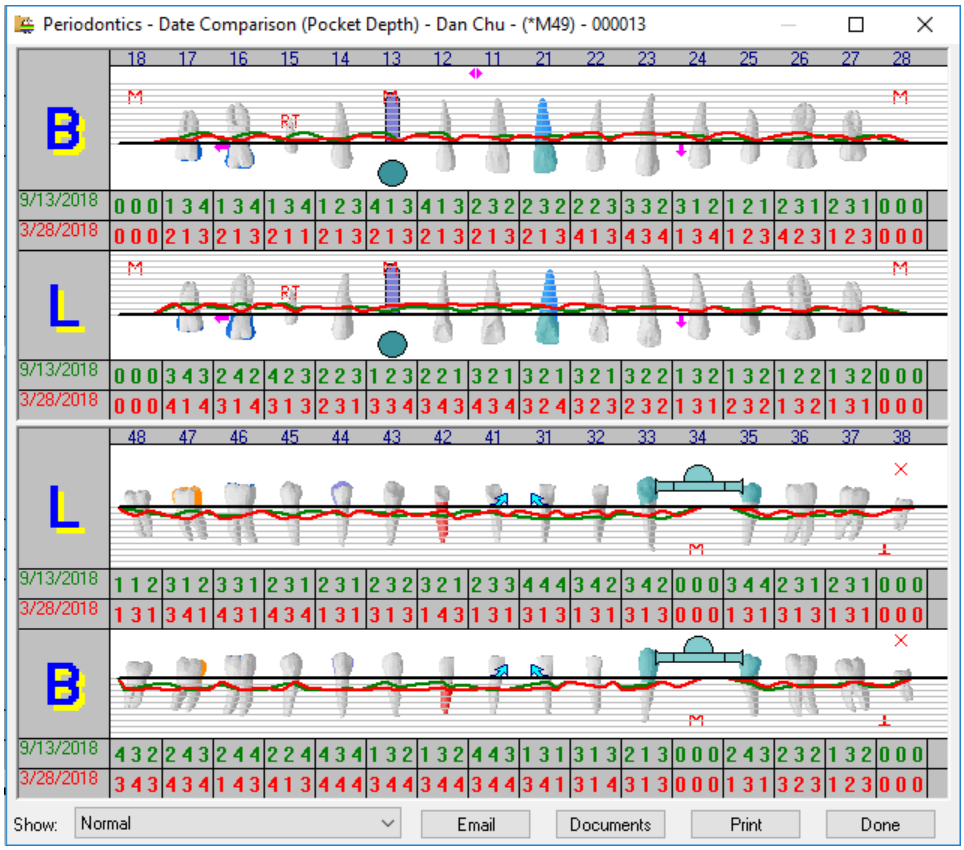
7.3 View Date Compare

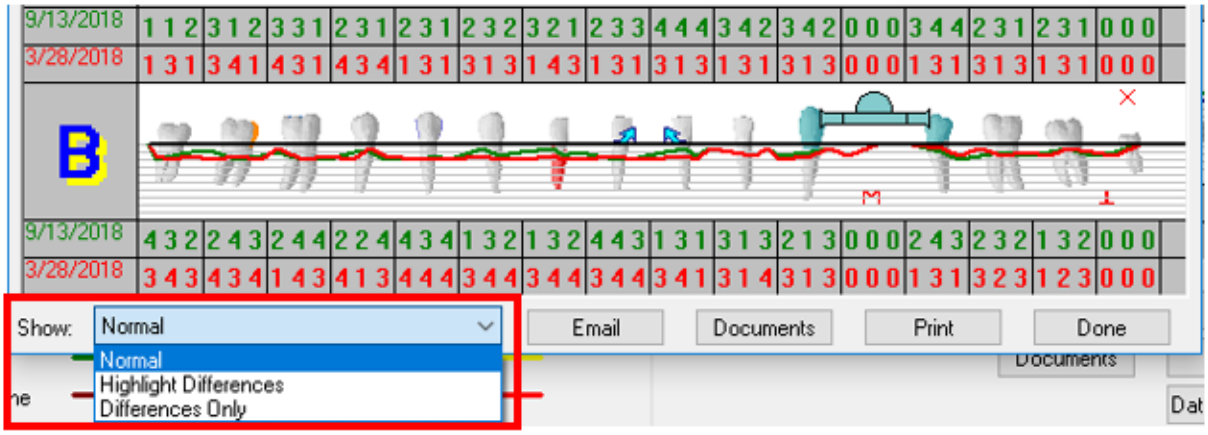
Date Compare in the full mouth view allows the user to view two or more different periodontal readings at one time.

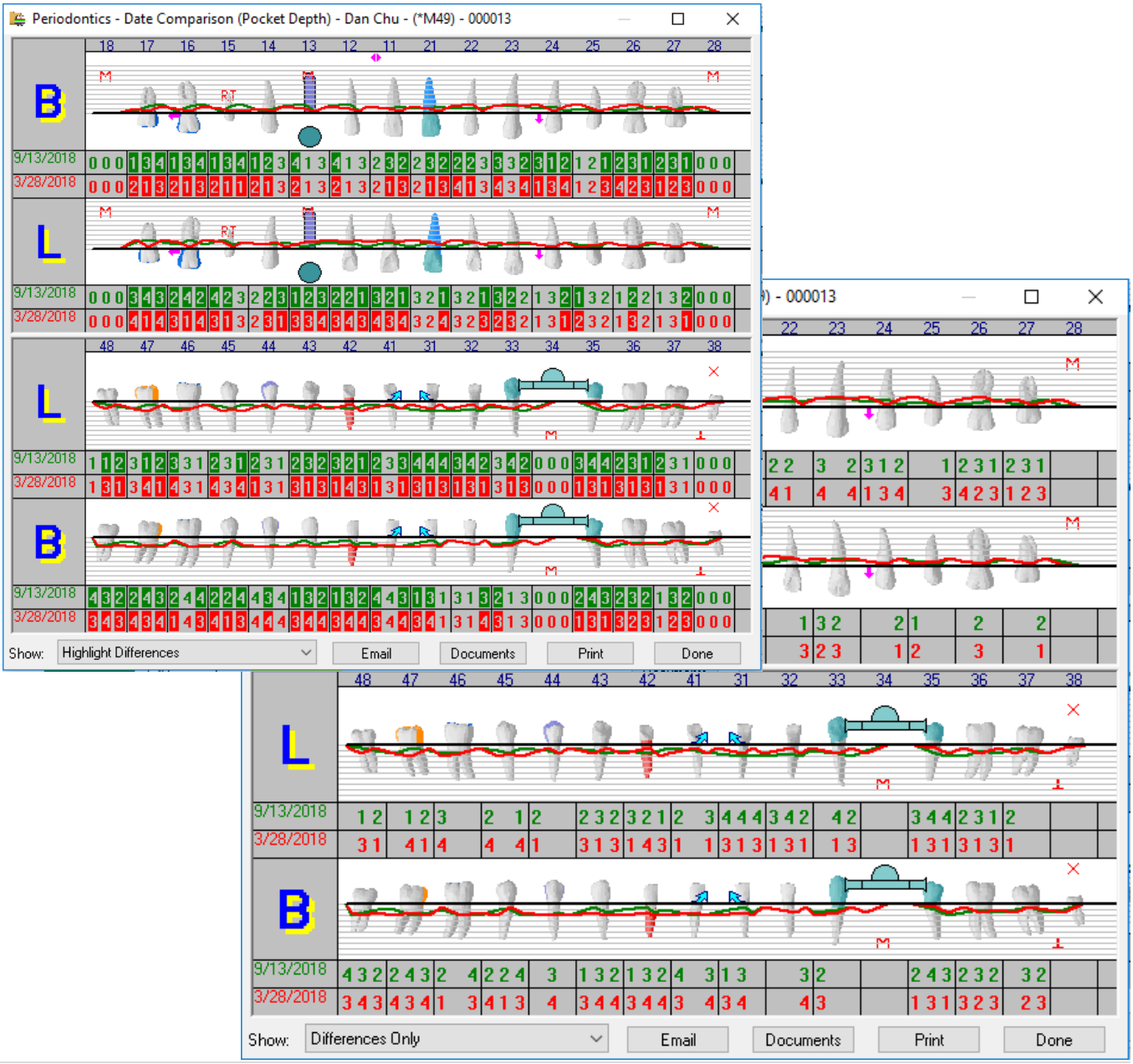
1. Click on the **Date Compare** button in the **Full Mouth View.**



2. Select which condition(s) to date compare.
3. Select which dates to compare, choosing from the dropdown lists and select a colour for each.
4. Click **Accept** to open the **Date Comparison** window.
5. Choose the desired **Show Option** to accentuate differences.



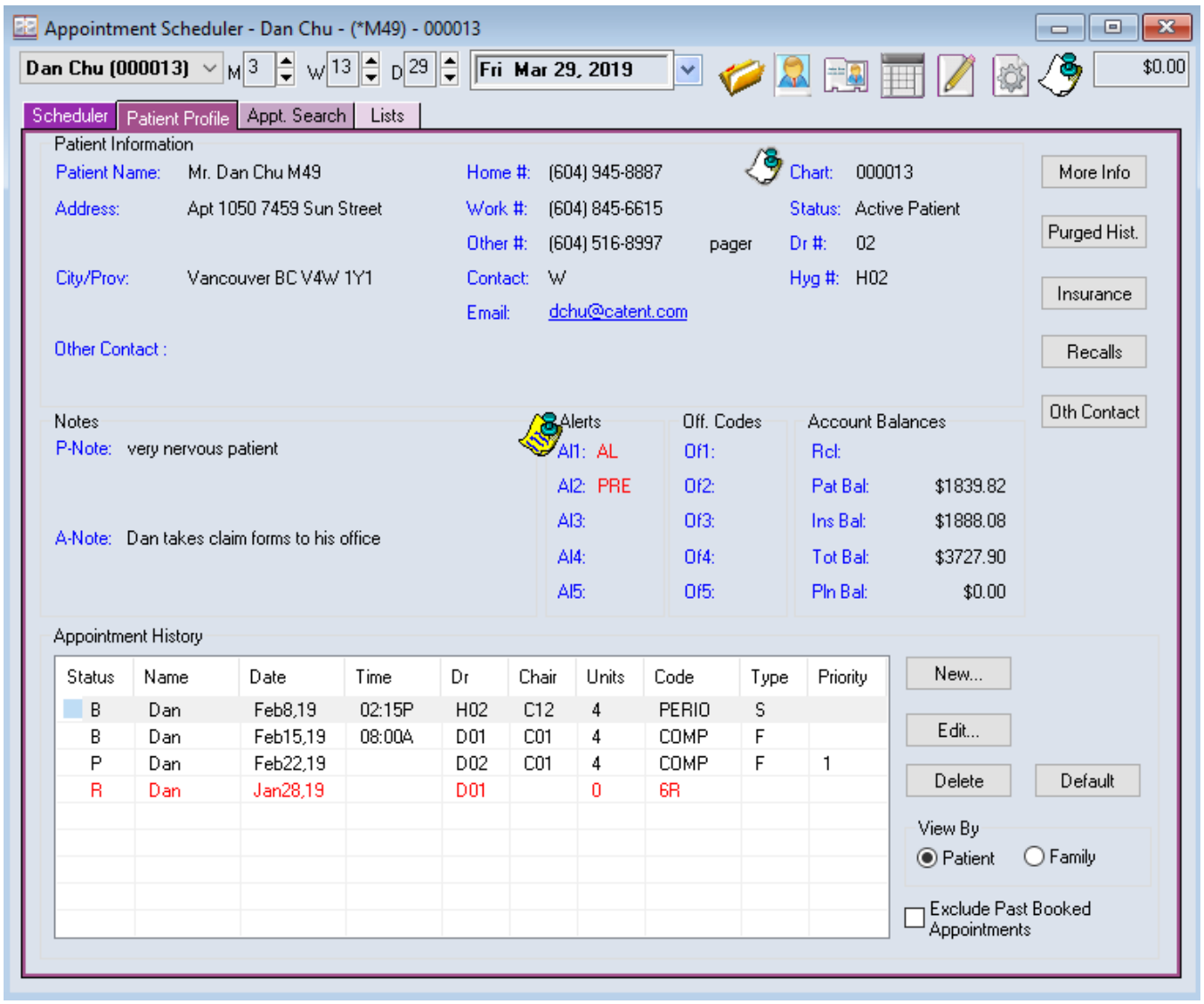

9/13/2018
3/28/2018
B
Show:
Normal
Normal
Highlight Differences
Differences Only
Email
Documents
Print
Done


Periodontics - Date Comparison (Pocket Depth) - Dan Chu - (*M49) - 000013
B
L
9/13/2018
3/28/2018
Show:
Highlight Differences
Differences Only
Email
Documents
Print
Done

Lesson 8: Scheduler

8.1 The Importance of the Patient Profile Screen

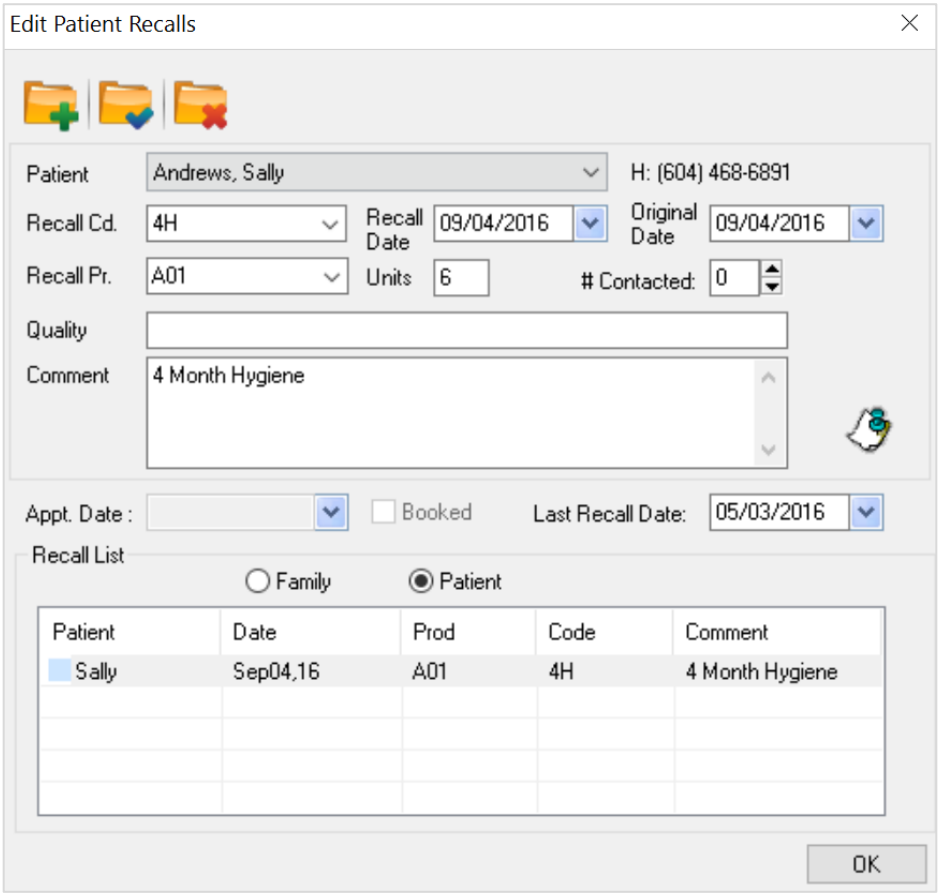
This Patient Profile screen gives an overview of the selected patient's data. This screen is your go to place. It compiles key information from other modules giving you a bird's eye view when communicating with a patient. At a glance, the screen displays Patient Contact information and notes, Patient Alerts, Insurance Details, Financial Balances, Recall due dates, and any Appointments booked or outstanding for all family members. A right click from this screen gives quick access to many areas of the program. In this way, the user can update patient data, take a payment, schedule, edit or go to an existing an appointment, swiftly and efficiently. In addition, there is easy access to the patient's email address.



8.2 Updating a Patients Recall

At hygiene and recall appointments the recall schedule will need to be updated.

1. In the Patient Profile tab, look on the right-hand side and find the **Recalls** button.
2. Select the **Recall Cd.** (recall interval) from the drop down menu. This will update the recall date to the new date.
3. Enter the number of units required for the appointment.
4. Click the **Save** icon.



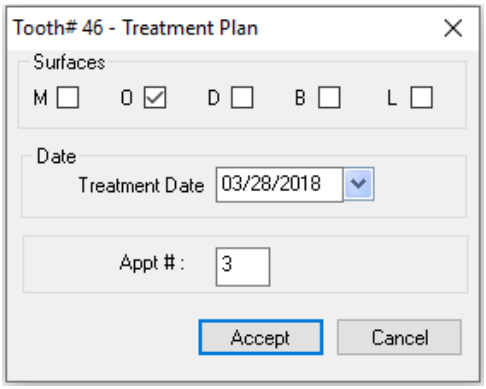
Lesson 9: Odontogram Extras

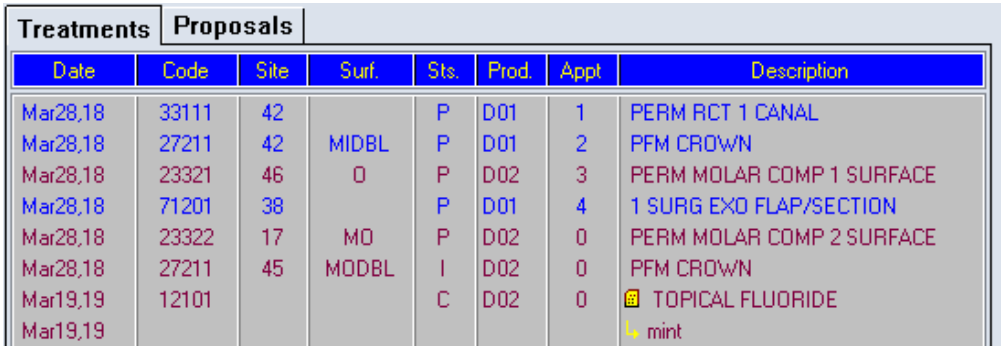
9.1 Appointment Number

An appointment number can be added to each treatment posted in the Odontogram. This will display in the **Treatments** tab and will fill the **Appt#** field for that procedure in the **Transaction** module. As such, the **Priority** field in the **Planned Appointment** detail box is defined as **Appt#**.

To enter the Appointment number:

1. In the **Treatments** tab, double click on the treatment line.
2. In the **Appt:** field, enter the desired appointment number for this treatment.
3. Select **Accept**.



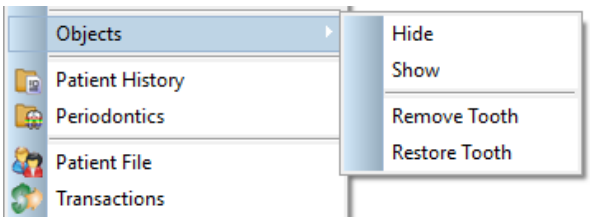


Treatments | Proposals

Date	Code	Site	Surf.	Sts.	Prod.	Appt	Description
Mar28,18	33111	42		P	D01	1	PERM RCT 1 CANAL
Mar28,18	27211	42	MIDBL	P	D01	2	PFM CROWN
Mar28,18	23321	46	O	P	D02	3	PERM MOLAR COMP 1 SURFACE
Mar28,18	71201	38		P	D01	4	1 SURG EXO FLAP/SECTION
Mar28,18	23322	17	MO	P	D02	0	PERM MOLAR COMP 2 SURFACE
Mar28,18	27211	45	MODBL	I	D02	0	PFM CROWN
Mar19,19	12101			C	D02	0	TOPICAL FLUORIDE
Mar19,19							mint

9.2 Right Click Menu Item: Objects

The Odontogram is viewed as a graphical representation of the patient's mouth. To keep the Odontogram accurate and updated, graphical revisions must be done as treatment is completed or modified. The right click menu item: **Object**, has been added in an effort to provide more accurate Odontograms for your patients.



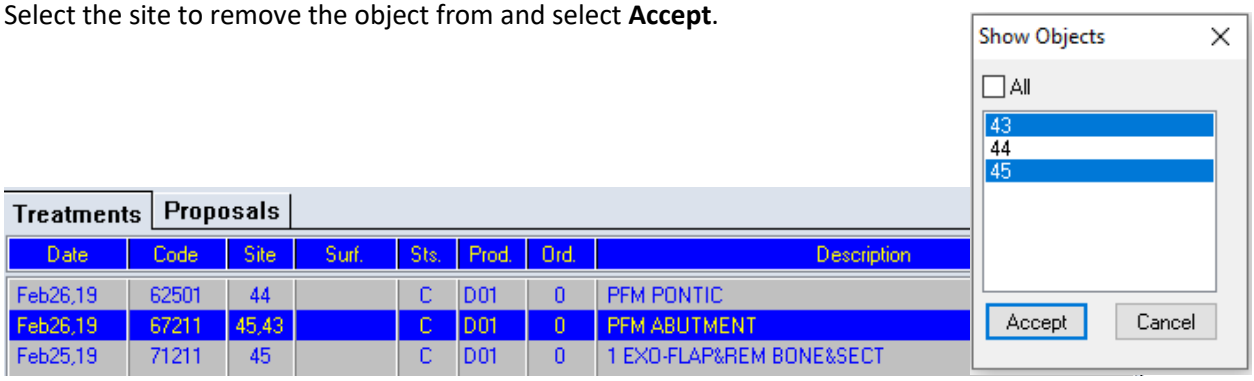
Objects: Hide and Show

The **Hide** and **Show** options will allow the user to hide or show an object in the Odontogram. Use this to remove treatment related objects when it is no longer in the patient's mouth to represent procedures such as pontic removals, abutment extractions, implant removals, etc.

How to use Hide Objects

1. Find the treatment line where the object is coming from.
2. Highlight and right click the treatment line.
3. Select **Object**.
4. Choose **Hide**.

If the treatment line covers multiple teeth, a secondary screen will appear with all the sites/teeth involved. Select the site to remove the object from and select **Accept**.



How to use Show Objects

To bring the object back in the Odontogram, repeat the above steps from step 1 to step 3 and choose **Show**.

Restore and Remove Tooth

Use the **Restore Tooth** function to bring back a tooth in the Odontogram which was marked as extracted without deleting the Treatment History. This can prove to be beneficial for situations such as when the wrong tooth was marked as extracted and submitted to a previous insurance policy.
NOTE: This can only be used on an extraction line.

How to use Restore Tooth

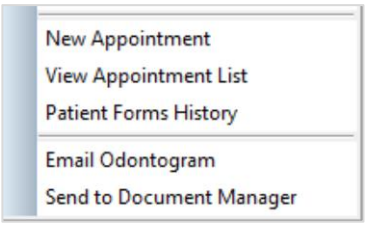
1. Find the treatment line for the extraction.
2. Highlight and right click on the treatment line.
3. Select **Object**.
4. Choose **Restore Tooth**.

How to use Remove Tooth

If Restore Tooth was done by mistake, use **Remove Tooth** to undo the action.

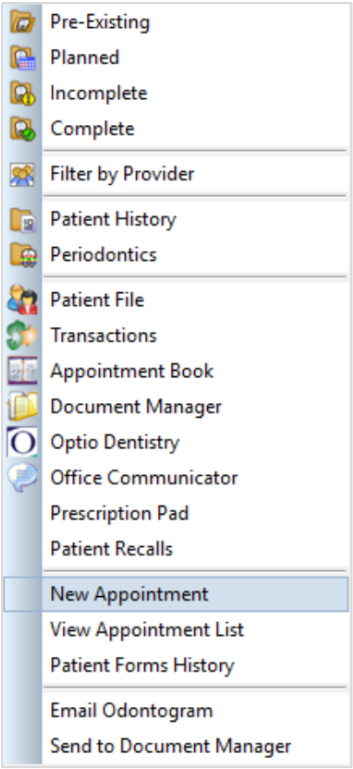
Simply follow the above steps from step 1 to step 3 and choose **Remove Tooth**.

9.3 Saving the Odontogram to the Document Manager



You can send a jpeg of the odontogram to the document manager to create a snapshot of the conditions/treatment as of a certain date. Right-click and select **Send to Document Manager**.

9.4 Planning an Appointment

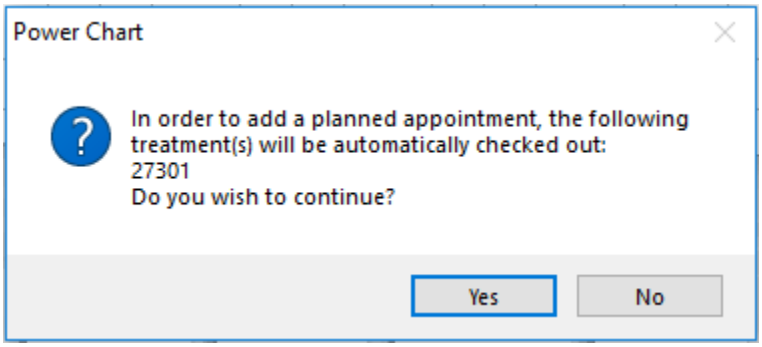


Once planned treatment has been entered in for the patient it is a good idea to plan the first appointment so that reception has all the information to schedule the appointment when the patient comes to the front. You can choose to link the treatment to the planned appointment or leave the appointment without any liked treatments for post op or follow up appointments.

To create a Planned Appointment with linked treatments

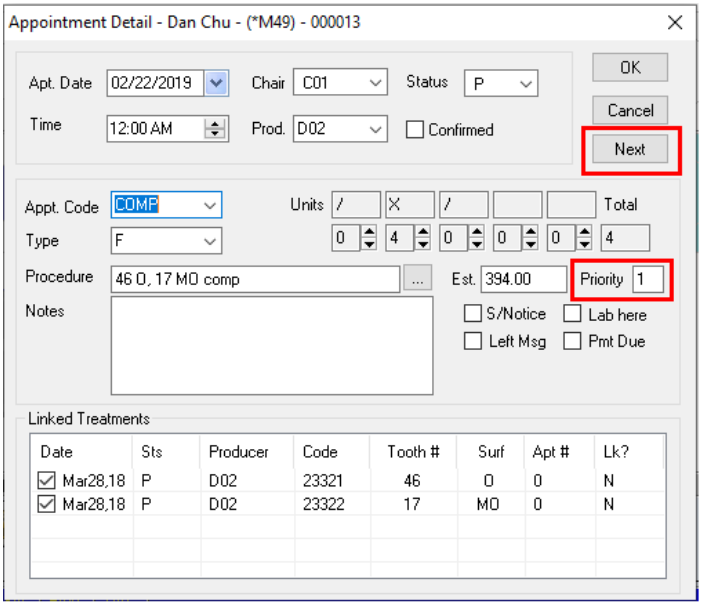
1. Left click to highlight the treatment to be done in next appointment. **NOTE:** *Hold down the Ctrl key on the keyboard to highlight more than one treatment.*
2. Right-click on the Treatment Tab area and select **New Appointment**.

NOTE: *If treatment has not been checked out, Power Chart will allow you to automatically check out the Planned Treatment(s). Click YES to link to the appointment.*



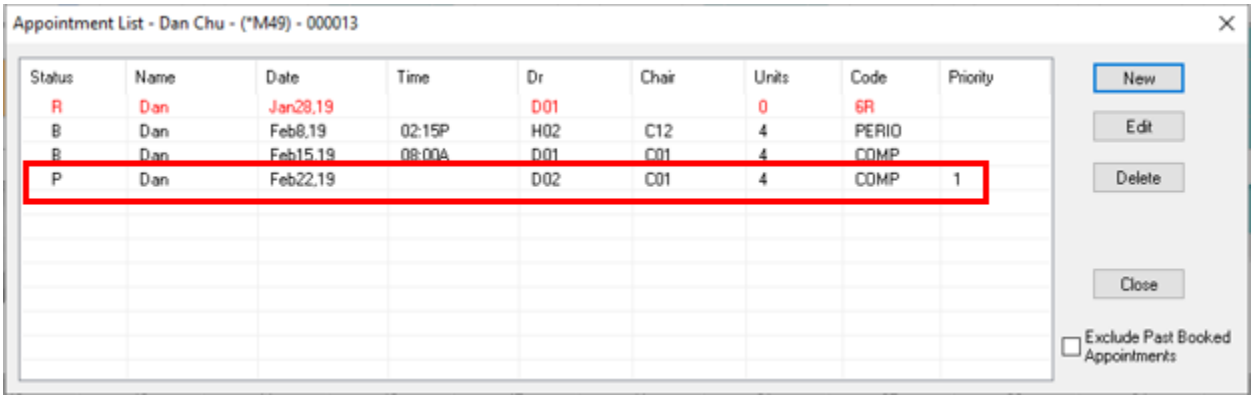
3. Choose the **Appt. Code** from the drop down menu.
4. Enter the appointment details under **Procedure**.
5. Ensure the **Units** of time are accurate and change if needed.
6. Check that the **Status is P** for Planned.
7. Click **OK** to save.

To create a Planned Appointment without linked treatments, simply right-click on the Odontogram and select **New Appointment** without highlighting any treatments. Repeat steps 3 to 7.

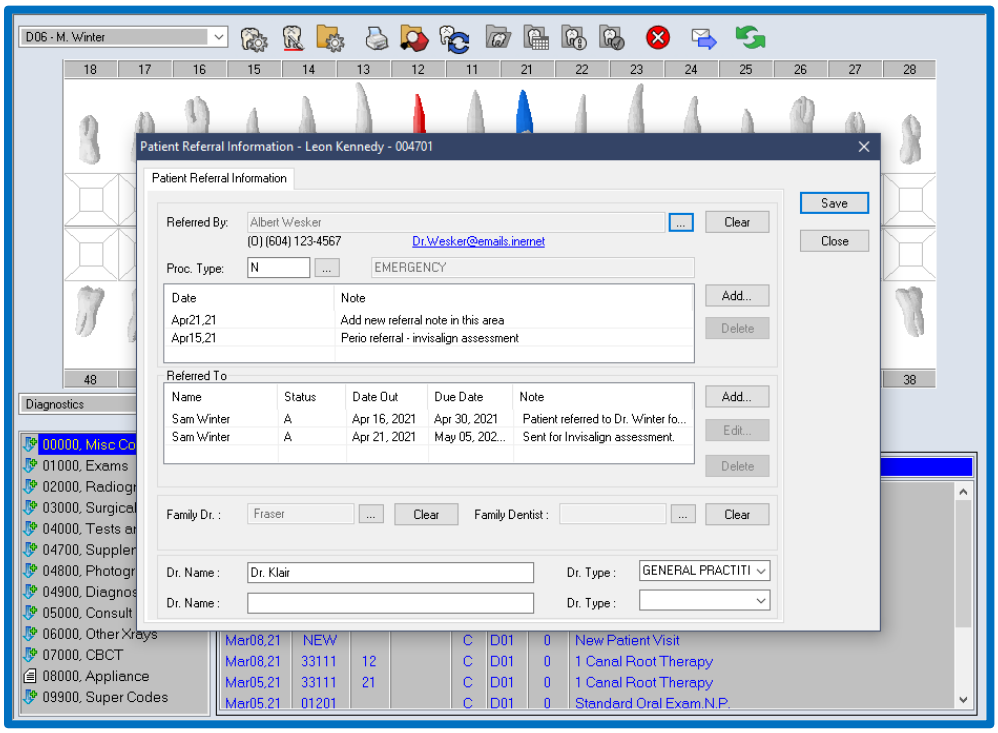


Create multiple Planned Appointments by clicking the **Next** button instead of **OK** and organize by setting a **Priority** for each appointment.

The appointment will now show as a planned line in the patient's scheduler profile that reception may schedule from.



9.5 Managing Referrals from Odontogram



- You can now manage your referral from the Odontogram. This option is found under the right click menu while using the Odontogram.

- As you can see, the module is fully accessible and functional, even when accessed indirectly via the Odontogram.

Lesson 10: Extras

10.1 Medical Alerts

Adding a Medical Alert

Medical Alerts are added under the Medical tab in the patient profile. They show along the bottom status bar, in the Alert History window, as well as pop up when scheduling or opening an appointment.

1. Go to the **Patient File Medical Tab.**
2. Click on the **Ellipses "…"** to select the codes.
3. Click on the **Alert Codes** that you wish to add to the patients file.
4. Click **Save** to save changes.

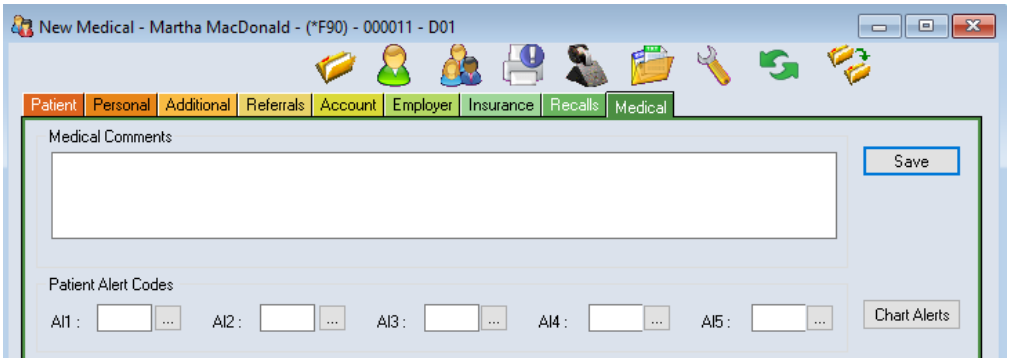
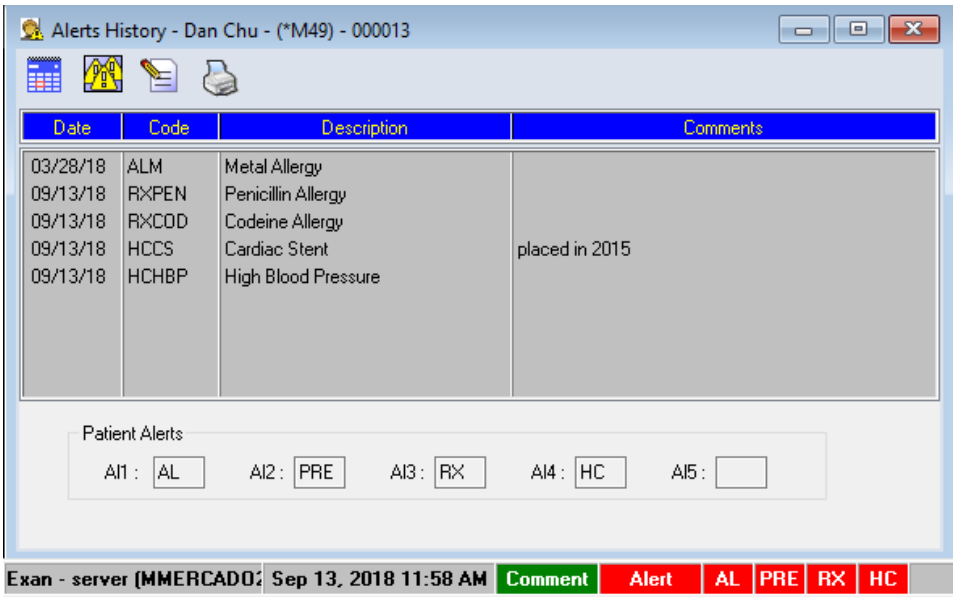


Chart Alerts

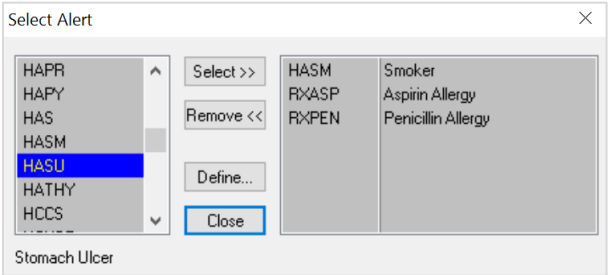
Patient Alerts are added in the Medical tab in the patient file. If an alert has been entered, there will be a red flag along the status bar at the bottom of the window, in the Alert History window, as well as pop up when scheduling or opening an appointment.

Chart Alerts are specific alert codes that have a date stamp to track when it was added to the patient and allow you to give the details of the Patient Alert category codes. They are added by clicking **Chart Alerts** in the patient file medical tab. Additional comments can be added to each Chart Alert.



Adding a Chart Alert

1. Click on the **Select Alert** icon in the **Alerts History** window.
2. Click on the **Alert Code** you want to add.
3. Click on the **Select** button and you will see the alert added to the right.
4. Click **Close** to save changes.

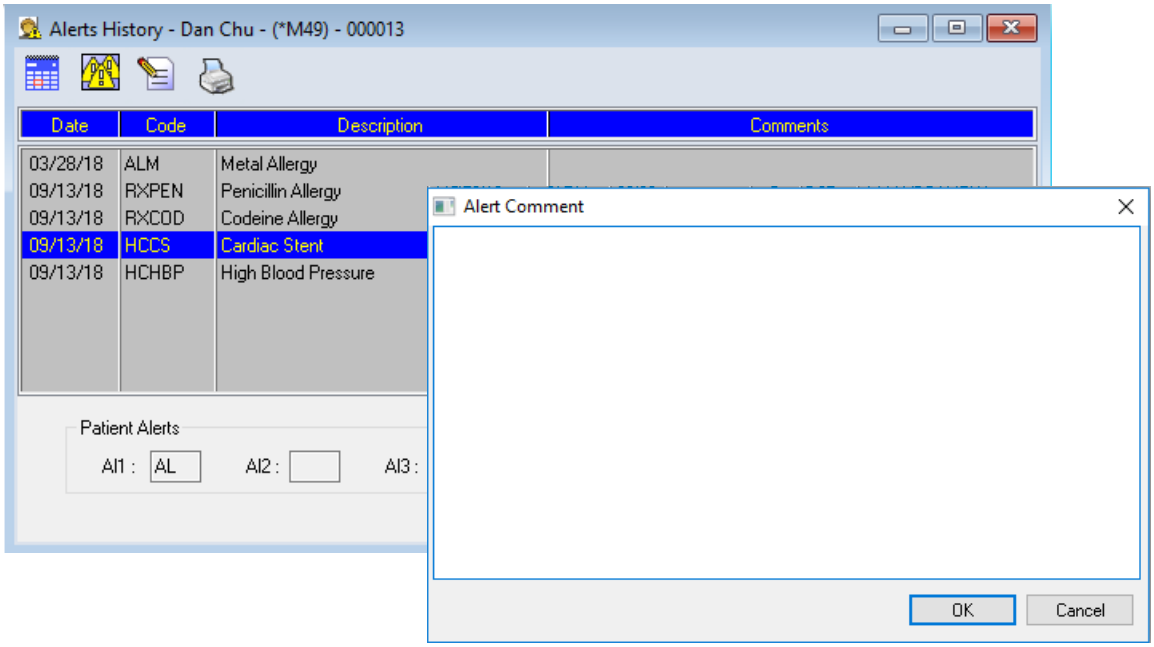


Removing an Alert Code

1. Click on the **Select Alert** icon in the **Alerts History** window.
2. Click on the **Alert Code** you want to remove.
3. Click on the **Remove** button.
4. Click **Close** to save changes.

Adding a Comment

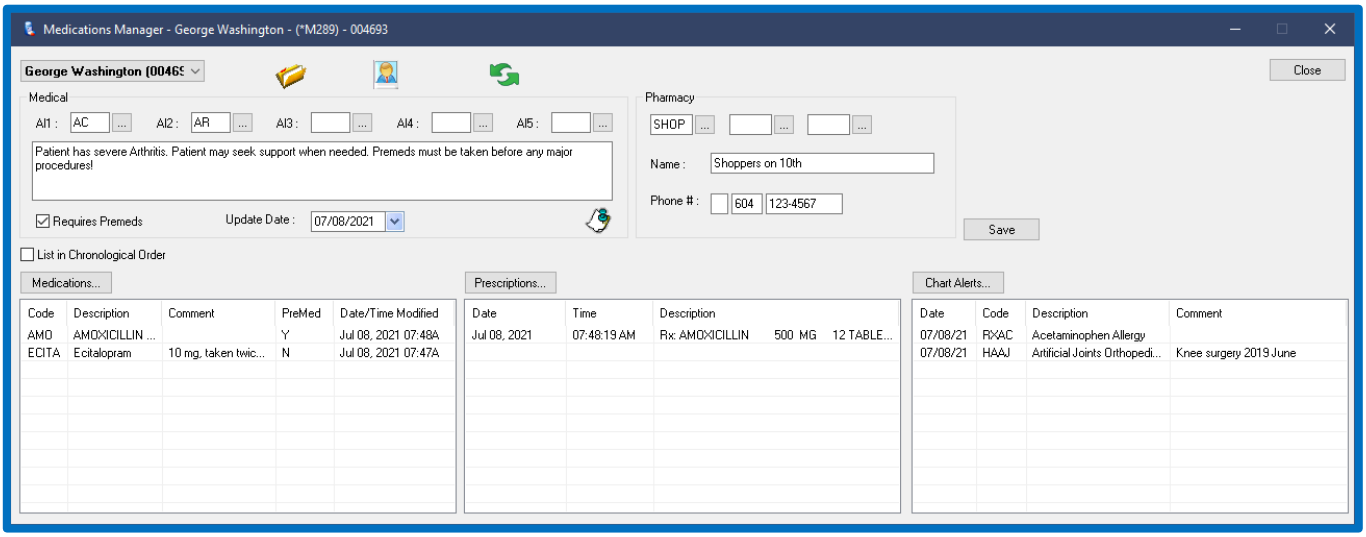
4. Highlight the Chart Alert to add the comment to and select the **Edit Note** icon. Or double click on the alert to add the comment to.
5. Type the comment.
6. Click **OK** to save changes.



10.2 Medication Manager

Online Video: Medications Module (Video) - Power Practice

The Medication module was added in version 5.0. It provides a unified health history profile for your patients. You can find this module under the Patient dropdown menu in the upper left of the program.



Gathering information that used to be scattered around the patient file, the new Medications Manager makes tracking patient health history a much simpler affair.

Alerts:

- Alerts 1-5 are the standard alerts previously found in the patient's Medical tab.

Pharmacy:

- The pharmacy information area has also been included in this module to further simplify medical information entry.

Medications:

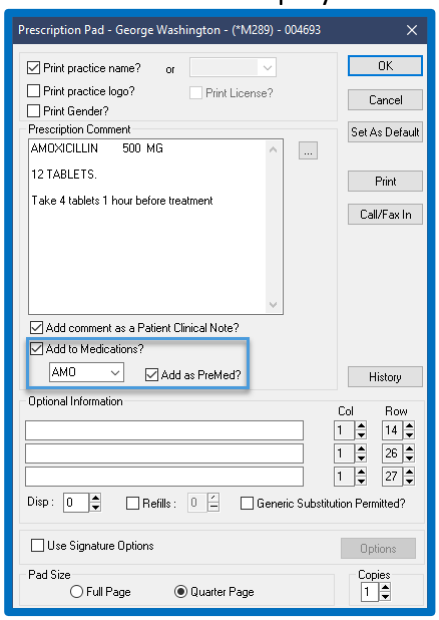
- New to Power Practice, you can now track patient Medications and include detailed notes about them.

Prescriptions:

- The traditional Prescriptions function has also been migrated to this new module.
- You can also set your prescription to automatically add the information to the Medications list.

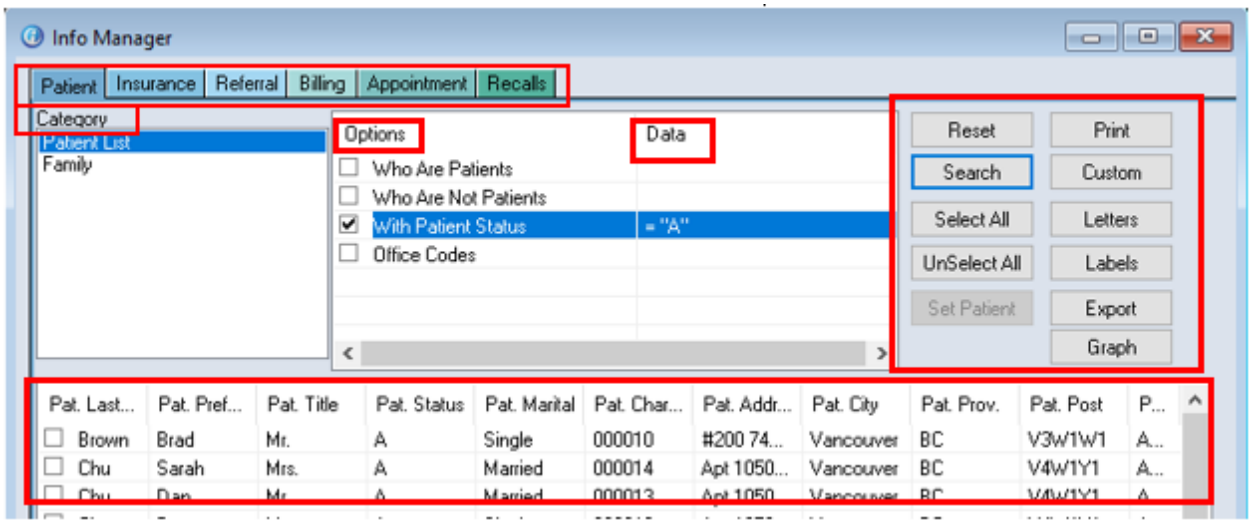
Chart Alerts:

- If your clinic uses the Power Chart module, the Chart Alerts system included will also be accessible from here.
- If you do not have Power Chart, this button will be grayed out.



10.3 Info Manager

Info Manager Overview



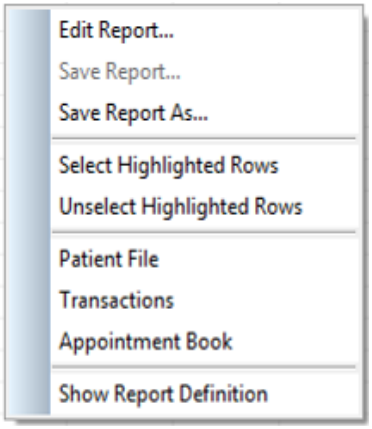
Areas of the Info Manager

- **Tabs** representing the areas of the program that reports can be generated on.
- **Category** under those tabs. Choosing different tabs and categories will generate different report information. For example: Patient tab has Category choices of Patient List and Family.
- When you choose your report tab, and Category, you can choose a defined **Option.**
- Some **Options** will allow for **Conditional Criteria** that will show in the **Data** column if set.
- The report will display here after pressing the **Search** button.

The Buttons

Reset will remove the data displayed but will keep the columns chosen.
Print will print the report.
Search generates the report and displays the information.
Custom is used to create/save/edit reports that you plan on re-using.
Select All puts a check beside every line of your report.
Letters The new mail merge function for letters.
Unselect All will take the check off all your selections.
Labels create custom labels with mail merge.
Set Patient chooses the patient you have highlighted. Right Click options to open this patient in Patient File, Transactions, and Appointment Book.
Export the selected report information to Excel.
Graph will graph selected data.

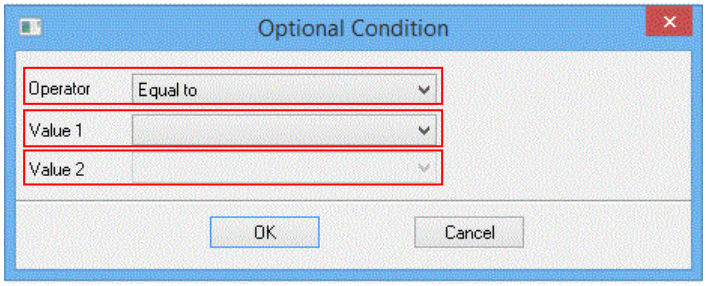
Right Click Menu

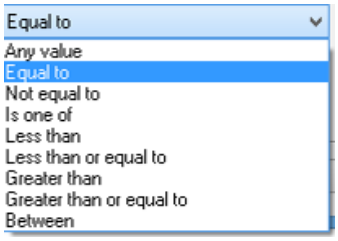


Right-click in the body of the report to access this menu.
Edit Report…brings up a box that allows further customization of the current report.
Save Report…saves the options and criteria that you have for the current report.
Save Report As… save a report with your own description.
Select Highlighted Rows highlight specific rows, then choose this to put a tick beside them.
Unselect Highlighted Rows un-tick highlighted rows.
Patient File will take you to the Patient File when **Set Patient** is selected.
Transactions will take you to Transactions when **Set Patient** is selected.
Appointment Book will take you to the Appointment Book (Scheduler).
Show Report Definition will open the Report Definition screen showing the criteria and conditions chosen for the current report.

Optional Conditions

When you tick a selection in the **Options** box that requires a specific choice, like **Office Codes**, the **Optional Conditions** box will come up. Choosing an **Optional Condition** will add more definition to your report.





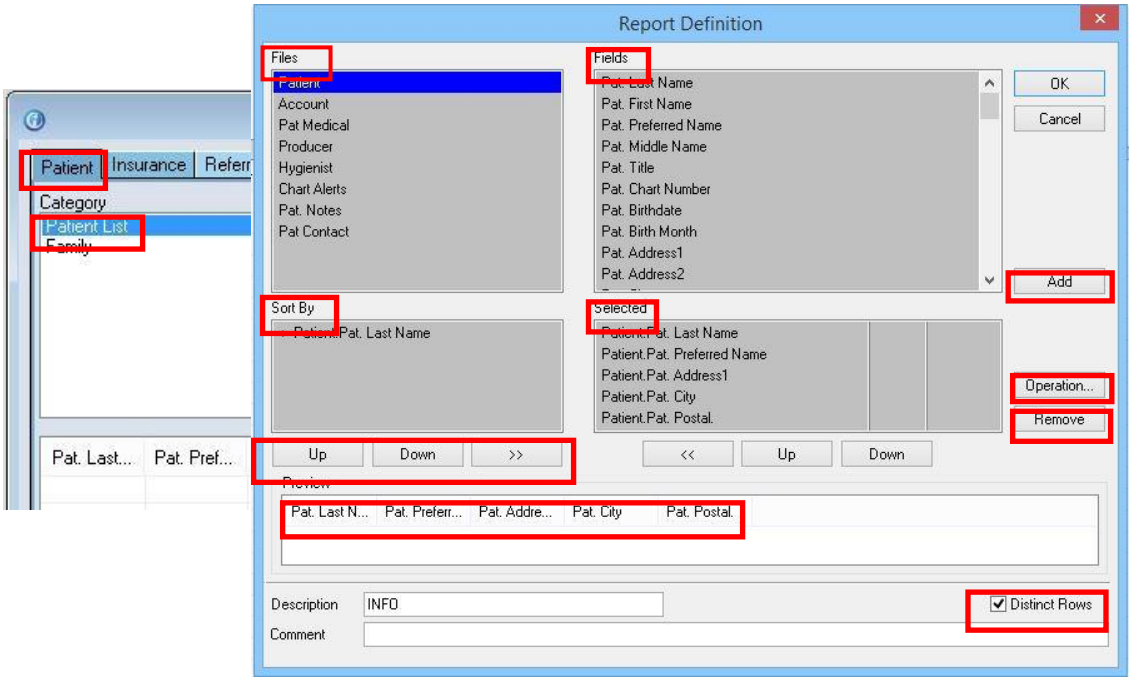
- **Operator** dropdown menu. Choose how you want the report to be filtered.
- **Value 1** dropdown menu. Choose the values related to the Operator you've chosen.
- **Value 2** dropdown menu. Will only activate when the Operator function chosen, such as Between, requires a second value to be chosen.

Report Definition

The **Report Definition** box opens when you right-click in the body of the report screen and choose **Edit Report** or **Show Report Definition**. You will also see this box when you click on the **Custom** button. This is used to further define a report.

This screenshot shows the **Custom** button display after choosing the **Patient** tab and **Patient List**.

Note: *the buttons, Description and Comment will not be available when choosing Show Report Definition.*

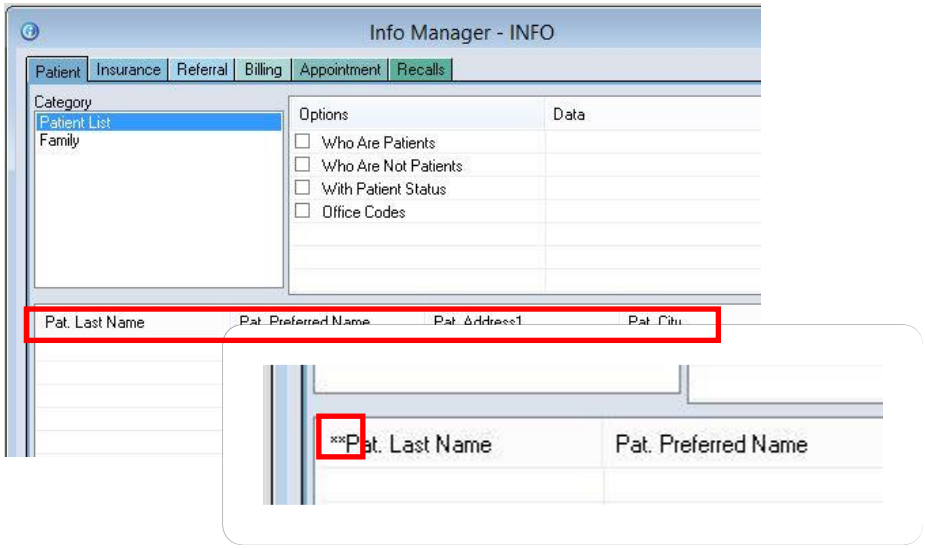


Areas of the Custom Report Definition

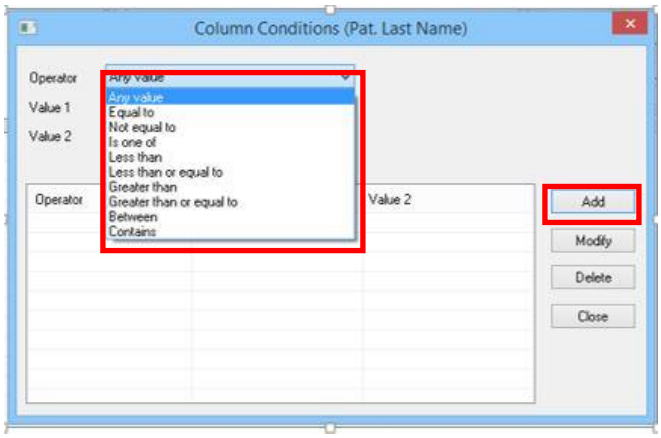
- **Files** within the **Patient** tab. Use these to customize your report.
- **Fields** will change depending on the File chosen. Double-click the field or press the **Add** button on the highlighted Field to add them to the **Selected** box. These display as column headers on the report.
- **Sort By** These are the available ways to sort your report. You can choose other options to **Sort By** from the **Selected** box.
- The **Up Down** and **>> <<** buttons will allow you to move information from **Sort By** to **Selected** and back again. You can also change their order with the Up and Down buttons.
- **Operation…** button for Column Operation. You can total by Sum, Average and more.
- **Remove** button will remove the highlighted item from the **Selected** box.
- **Preview** shows the column headers you will see on your report. These can also be modified by clicking on them, opening the **Column Conditions.**
- **Distinct Rows** Ticking this will make sure no duplicate rows are returned.

Column Conditions

- When creating Custom reports, **Column Conditions** can be chosen by left clicking on a column name.
- When a **Condition** has been selected for a column, a double asterisk(**) will show to the left of the column name.



- More than one condition can be added to a column. Make the selection with the **Operator** drop down and choose your values.
- Press the **Add** button.
- Make the next selection by choosing the **Operator**, entering in the **Value(s)** and Press the **Add** button. The conditions you add will be listed in the box.



Creating Reports

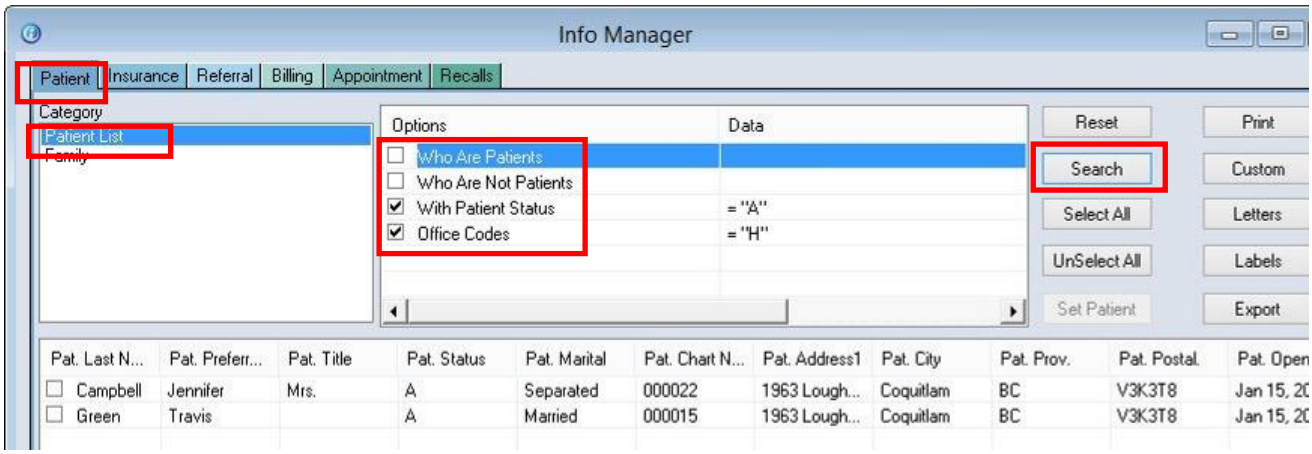
Use the pre-defined reports built in to the Info Manager or generate custom reports. With each report you can choose the columns you want to see and which columns you want to have a count or sum for (if any).

> ***TIP***
>
> *Before creating the report it is a good idea to have in mind what you want the report to show you.*
> *What do you want the report to gather information on?*
> *For example:*
> - *A report showing all patients with incomplete crowns and planned appointments-showing the patient's name, the treatment and the planned appointment date.*
> - *All direct insurance deposits for a month-showing deposit payee, the payment date and the total amount of each payee.*
> - *How many exams were done in a 6 month period-showing the treatment code you are looking for, treatment date, treatment producer and treatment billing dr.*

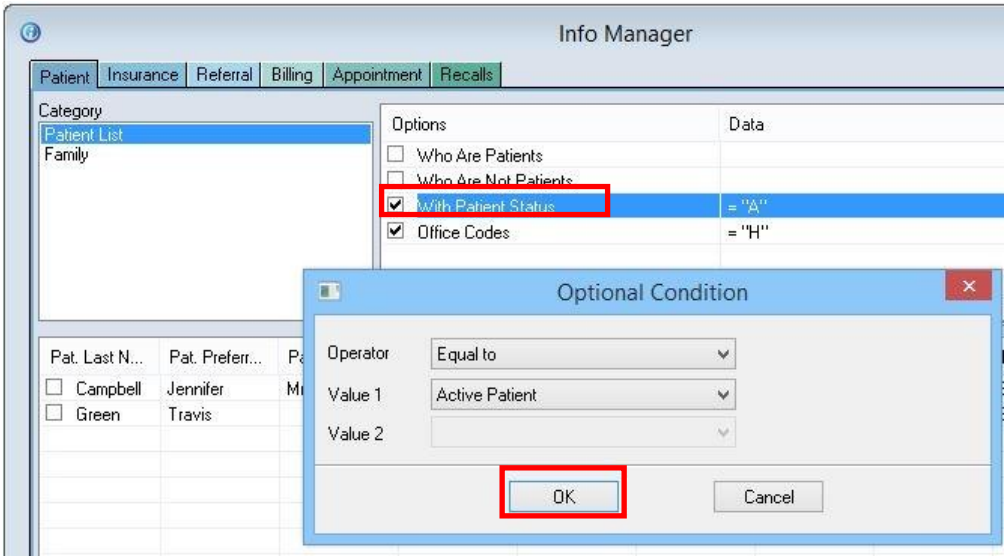
Pre-Defined Reports-Example 1

The screenshot below is an example of a report for all patients with the Office Code of "H" who have an Active patient status.

- Choose **Patient List** from the **Patient** tab.
- Under **Options** choose **With Patient Status** and **Office Codes.**

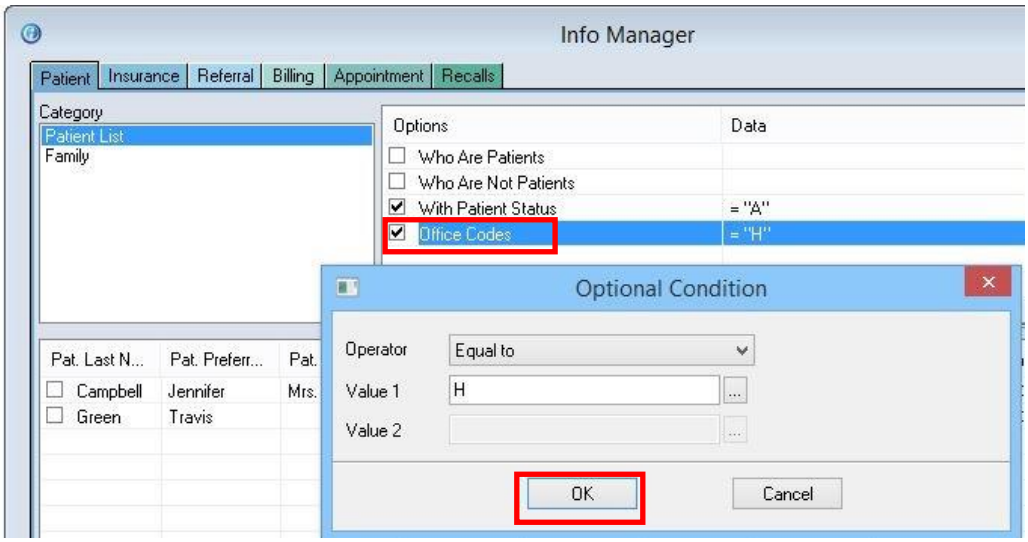


- When you tick **With Patient Status** an **Optional Condition** box will open. Select the **Operator** Equal To and choose the **Active Patient** from the **Value 1** box. Press **OK.**



- When you tick **Office Codes** an **Optional Condition** box will open. Select the **Operator** Equal To and choose the **Office Code** from the **Value 1** box.

- Press **OK.**

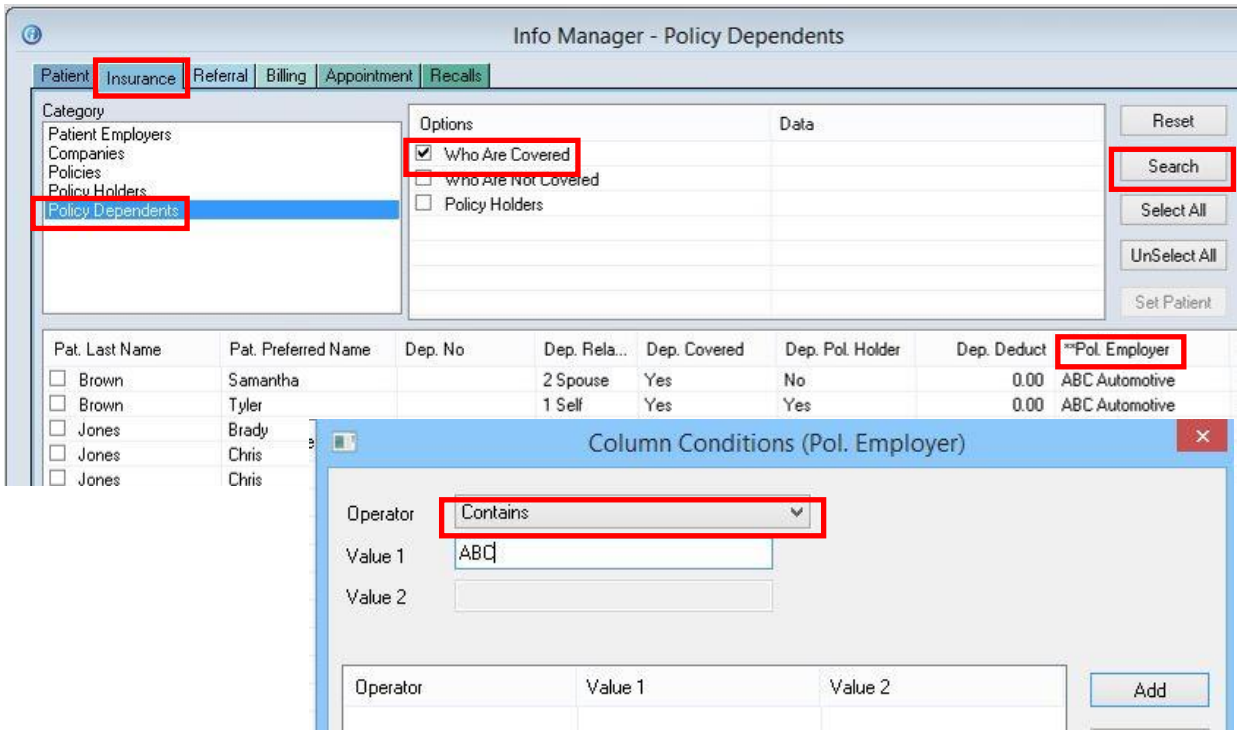


- Click **Search.**

Pre-Defined Reports—Example 2

The screenshot below shows an example of only those patients with “ABC” as the employer who are covered, including dependents.

1. Under the **Insurance** tab, choose **Policy Dependents.**
2. Under **Options** choose **Who Are Covered.**
3. Click on **Pol. Employer** and enter the employer name. If you choose **Contains** from the drop down, you can put in part of the employer name.
4. Click **Search.**

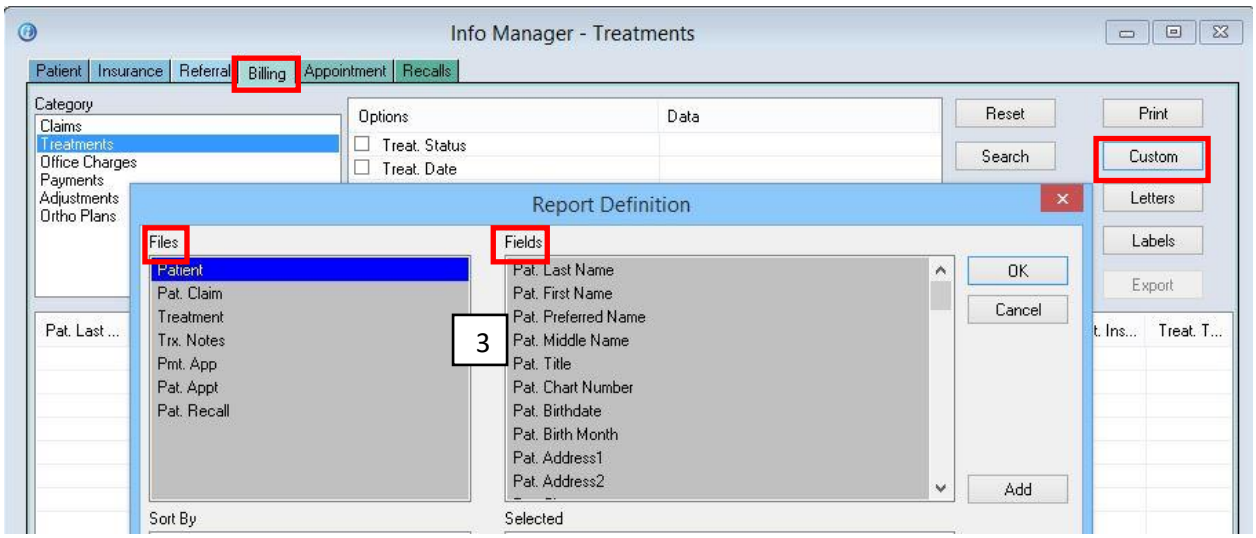


Custom Report-Example 1

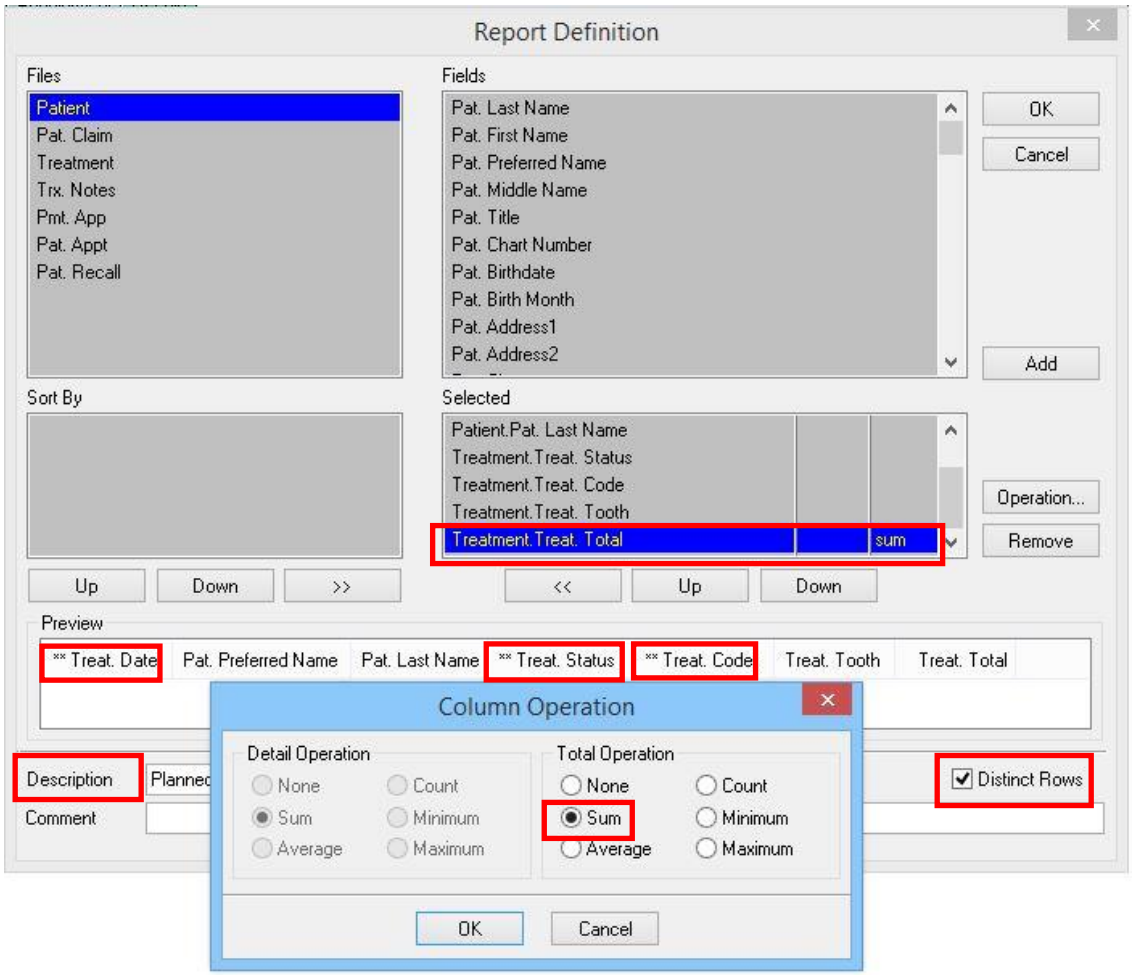
This example will show all patients with a lab still in the Planned status with a planned treatment date after a specific date. It will also show a total amount for the treatment.

1. Choose the **Billings** tab and click on **Treatments.**
2. Click on the **Custom** button and click on **New.**
3. Highlight the category in **Files** then highlight the **Fields** that you want as columns and click the **Add** button after each one chosen. For this example choose in the order listed:

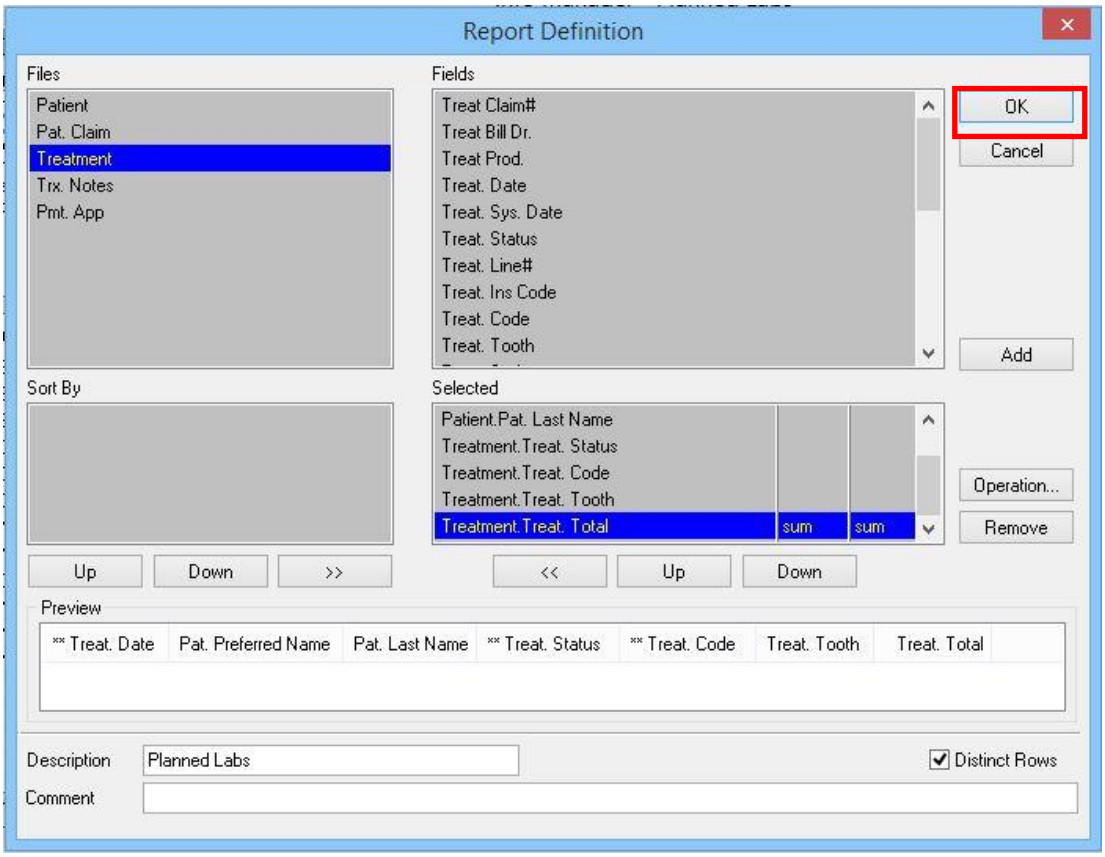
   Treatment.Treat.Date
   Patient.Pat.Preferred Name
   Patient.Pat Last Name
   Treatment.Treat. Status
   Treatment.Treat. Code
   Treatment.Treat. Total



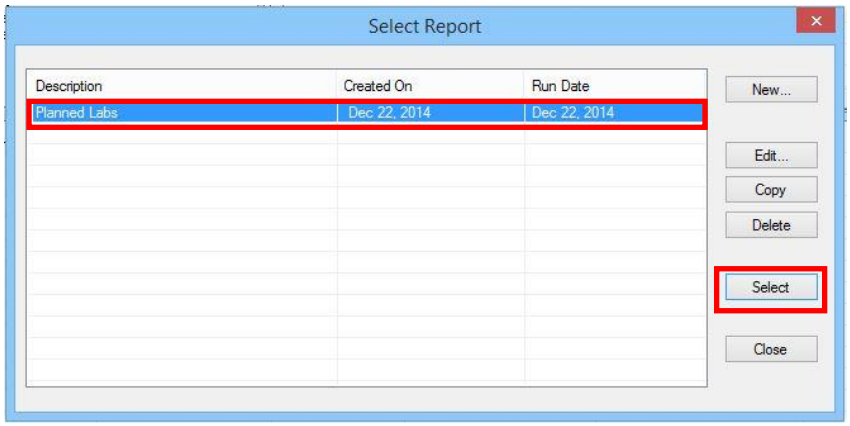
4. Highlight Treatment.Treat.Total in the **Selected** box and click on the **Operation**… button. Choose **Sum.**
5. Click on Treat.Date in the Preview and choose **Greater Than** in the **Operator** drop down and enter a date for **Value 1**. Click **Add** and **Close.**
6. Click Treat.Status in the Preview and choose **Equal to** from the **Operator** drop down and type a **P** (for planned treatment) in **Value 1**. Click **Add** and **Close.**
7. Click on Treat.Code and choose **Between** in the **Operator** drop down. In **Value 1** type in **L00000** and **Value 2** type **L99111**. Click **Add** and **Close.**
8. Give the report a **Description** and tick **Distinct Rows.**



Note: this example does not change the sort order. You can choose a specific sort order by highlighting a line from the Selected box and moving it to the Sort By box by clicking on the << button underneath the column.



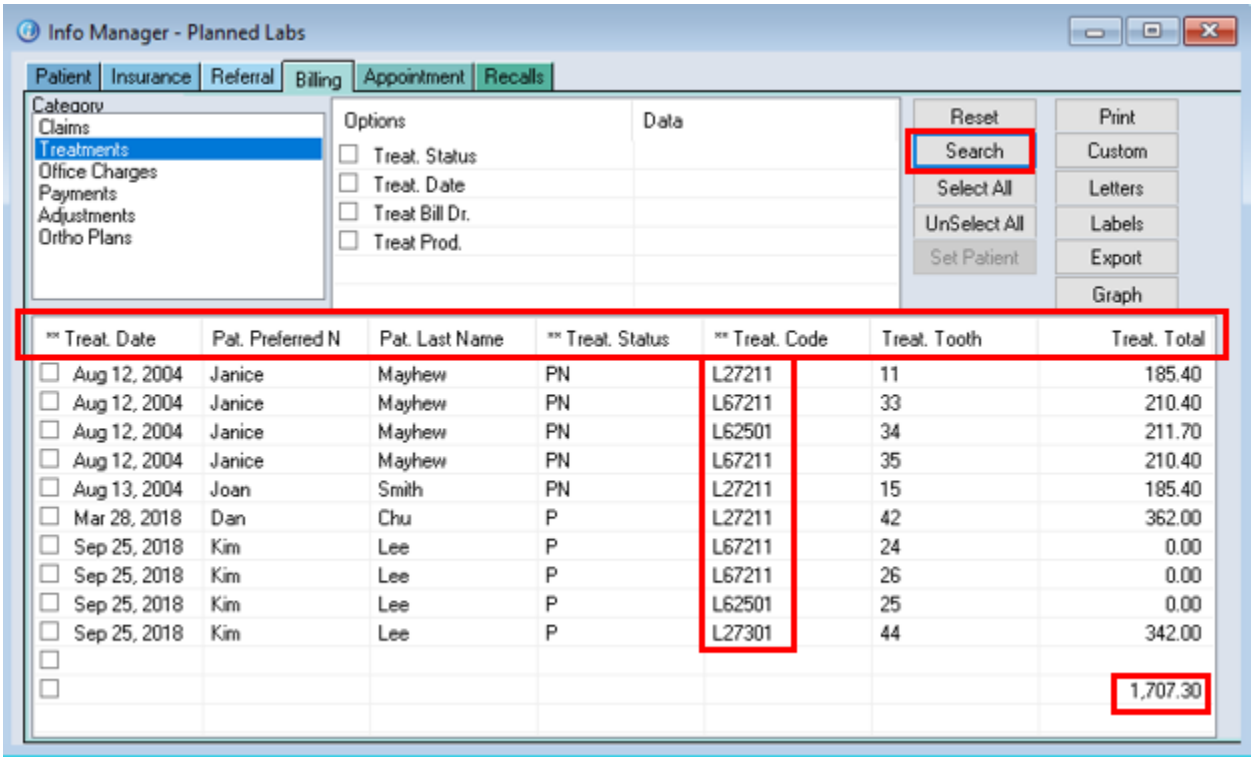
- Press **OK.**



- Highlight the report just created and press **Select.**
- Click the **Search** button.

Your report should look like the one below.

- Note the asterisks beside the column headers. This means specific conditions for these have been chosen.
- Only the lab codes are displayed.
- There is a total amount (patient and insurance combined) for the treatment displayed.



Custom Report-Example 2

This example will show patients referred out to a specific Dr and on what date.

1. Choose the **Referral** tab and click on **Referrals To.**
2. Click on the **Custom** button and click on **New.**
3. Highlight the category in **Files** then highlight the **Field** that you want as columns and click the **Add** button after each one chosen. For this example choose in the following order:

   Patient.Pat. Last Name

   Patient.Pat. First Name

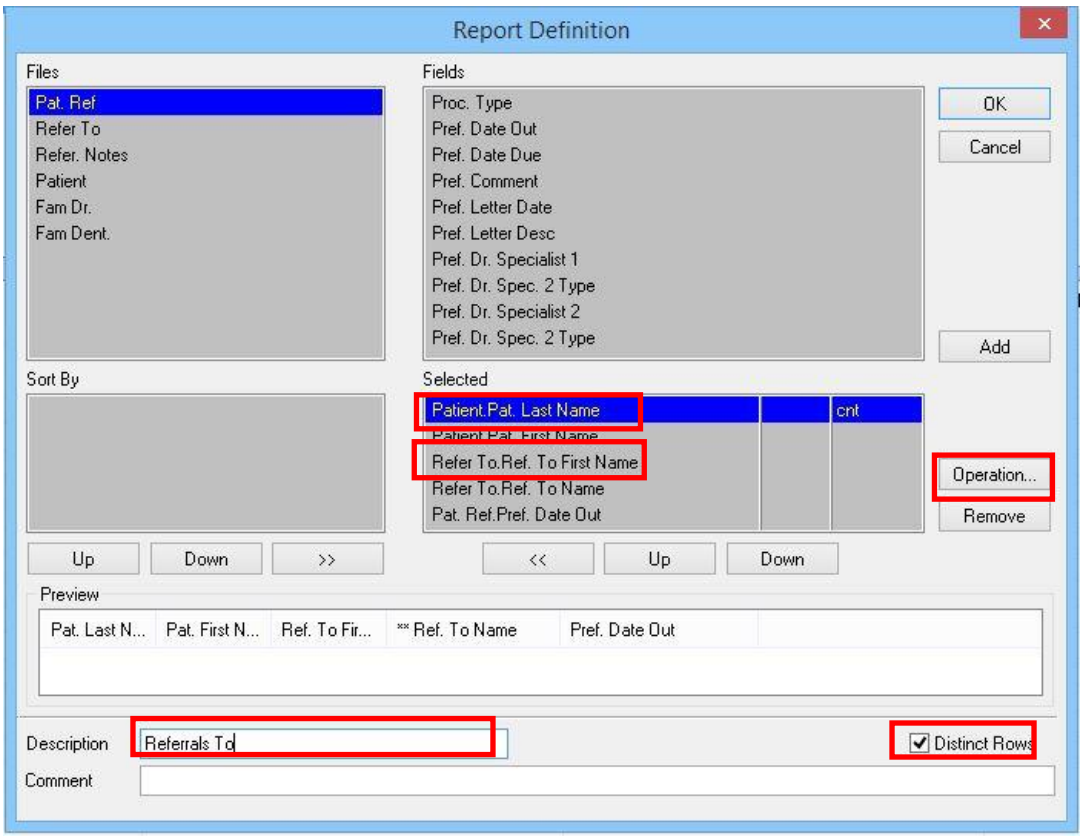
   Refer To.Ref. To First Name

   Refer To.Ref To Name

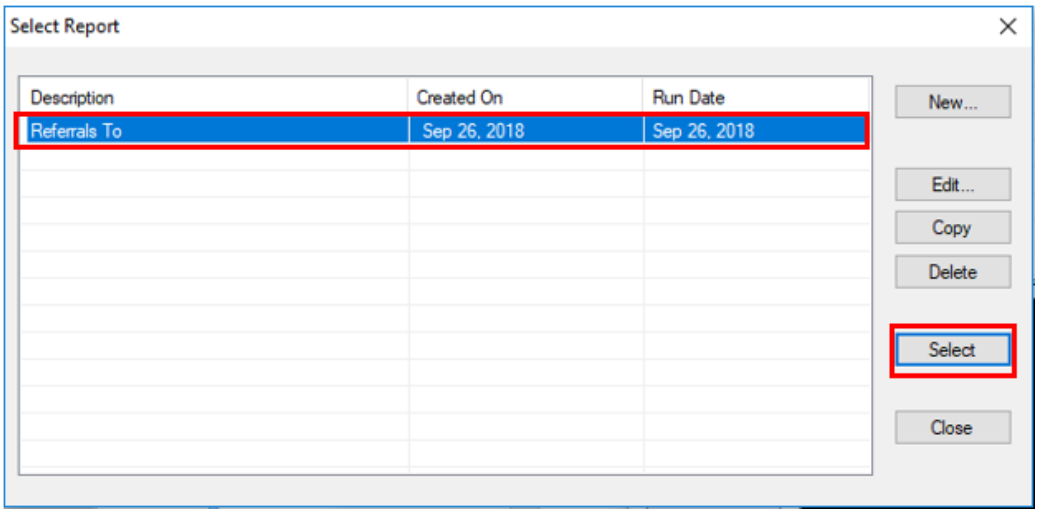
   Pat. Ref.Pref. Date Out
4. Highlight Patient.Pat.Last Name and click on the **Operation…** button. Choose **Count.**
5. Click on **Refer To.Ref. To Name** and choose **Equal To** in the **Operator** drop down and enter a referral name in **Value 1**. Click **Add** and **Close.**
6. Give the report a **Description** and tick **Distinct Rows.**

The Report Selections will look like the following screenshot.

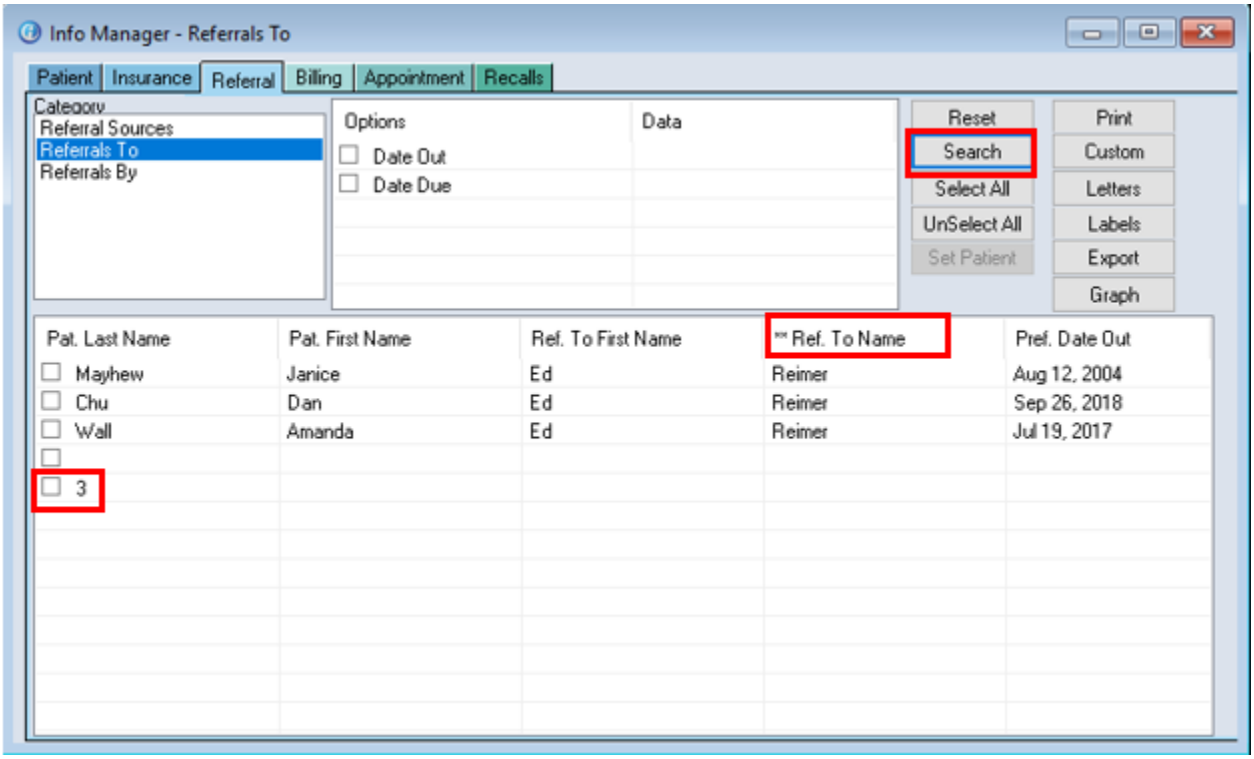
Click **OK**.



- Highlight the report just created and press the **Select** button.



- Click the **Search** button. The report will show the data related to your customized report.
- Note the asterisks beside the column names.
- There is a count under the **Pat.LastName** column.



Notes:

Lesson 1: Power Practice

1. Open Power Practice, Login: exan Password: exan
2. Remove the icons that are not needed in clinical practice from the toolbar. 

3. Locate Single Patient Mode and ensure it is ticked.
4. Change the default startup tasks to Odontogram, Patient History, Periodontics, and Patient Appointment.
5. Search for the following patients using the search modes provided:
    a. George MacDonald – by last name
    b. Julie – by email: jones123@shaw.ca
    c. Michael – by phone number: 604-555-8979
    d. Jennifer Campbell – by first name

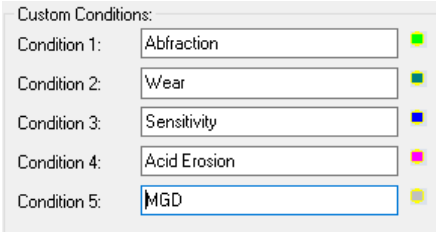
Lesson 2: Odontogram

1. Open the odontogram for Jennifer Campbell.

2. Set the Producer Colours to D01=**Blue**, D02=**Green**, and H01=**Purple**

3. Go into the Odontogram Settings and change each of the following settings and click Accept after each change to see how it affects the odontogram view.
    a. Deselect Pre-Existing in the Treatment Status section.
    b. Deselect Pre-Existing and Complete in the History Listing section.
    c. Select Colour treatments by Provider.
    d. Select Show in Reverse Chronological Order.
    e. Select Show Treatment Notes and Colour Treatment Notes by Provider.
    f. Change the Tooth section from Buccal to Lingual (set back to Buccal after).
    g. Change the Maximum Display Panel to 60%.
    h. Select Use New Charting Symbol Layout.
    i. Select Show Deleted Lines (then deselect after).
    j. Set Automatically Remove Conditions to Ask.

4. Set up the following custom conditions:



5. Add the following to the odontogram:
    a. Abfraction on 14B and 24B
    b. Wear on mandibular anteriors incisals
    c. Sensitivity on 26D
    d. Acid Erosion on 36O, 37O, 46O, and 47O
    e. MGD on 14B and 24B

6. Change the Super Codes button to:
    a. Button Name: Removable Prosthetics
    b. Button Icon: 
    c. Remove the current procedure code: HYG1
    d. Add the Procedure codes: 51201, 51202, 54201, 56211, 56212.

7. Add a Custom Painting to the 15B to represent a Class V Composite Restoration.

Lesson 3: Procedure Codes

1. Change the description of 27602 Porc/Cerm Bond Veneer in the Odontogram to just say Veneer.

2. Change the description of 83202 MD Fixed Retention Appl in the Maintenance Manager to say Lingual Bar.

3. Edit how 83202 displays on the Odontogram:
    a. Set Type as Objects
    b. Set Zone as Retainer Bar
    c. Set colour as Dark Blue

4. Create a Super Code for a PFM Crown including the following procedures: PFM Crown, Prefabricated Post, and Composite Core Build Up. (27211, 25731, 23602)

5. Remove 1u Scaling from the HYG1 Super Code and add 3u Scaling.

Lesson 4: Treatment Proposals

1. Add Treatment Proposal for Jennifer Campbell using the right-click “Add to New Proposal” or “Add to Existing Proposal”.
    a) Option 1: 26 PFM Crown
    b) Option 2: 26 5 surf resto

2. Add Treatment Proposal for Jennifer Campbell using the Temp List.
    a) Option 1: 17 RCT with Occlusal Comp Resto
    b) Option 2: 17 Simple Exo

3. Delete the Comp Resto from the 17 option 1 and add a PFM.

4. Delete 17 option 2 and add new proposal for 17 as Complicated Exo.

5. Add a title for each proposal with the units of time for the appointment.

6. Send a Proposal Message to reception.

7. Open the Proposal Module.

8. Add a treatment note for 17 and 26 Option 1 that Pt requested pre-auth before making a decision.

9. Change proposal statuses to in review.

10. Change statuses to reflect patient acceptance of the 17 option 1 and decline of 17 option 2.

11. Run Report of all New and In Review Proposals

12. View the Proposal History from the Odontogram.

13. Change the Proposal options in the Odontogram to display the fee columns.

Lesson 5: Notes

1. Add a Comment Template for a procedure you regularly do in your own office.

2. Modify the Anes1 template to say: __ carps 2% Lidocaine 1:100k epi

3. Delete the Anes2 template

4. Go into the Patient History Settings and change each of the following settings and click Accept after each change to see how it affects the view.
    a. Deselect Pre-Existing.
    b. Select Show full notes.
    c. Select Show deleted lines (then deselect after).
    d. Select Show full procedure description (then deselect after).
    e. Select Colour treatments by Provider and Colour Treatment Notes by Provider.
    f. Select Show in Reverse Chronological Order.
    g. Select Use New print layout.
    h. Select Show Note Type Indicator.
    i. Change View Options to Show All.

5. Select a two year date range from Jan 2015 to Jan 2017 to see recently planned treatment.

6. Jennifer says the 17 is sensitive, use the View Specific Sites to see the history of that tooth.

7. Create a Custom Site Label called Med Hx Update.

Lesson 6: Periodontal Charting

1. Add Bone Line, Suppuration, Furcation, and Mobility to be recorded.

2. Add a custom recording for MGJ.

3. Record a Perio chart for Jennifer for Q1 and ensure you add readings for the options: Pocket Depth, Recession, Suppuration, Bleeding, Furcation, Mobility, and MGJ.

4. Go into the Perio Settings and change each of the following settings and click Accept after each change to see how it affects the view.
    a) Select Auto-calculate Bone Line and Calculate Attachment – re-enter pocket depth to see the change.
    b) Select Show prior date on startup – close and re-open Perio Chart to see the change.
    c) Select Red flag if pocket depth is greater than 4mm.
    d) Select Show Objects and Conditions.
    e) Select Advance before setting value.

5. View Date compare and compare the Pocket depths from Dec 2012 and the readings you took today.

6. Upload the Date Compare to the Hygiene Tab in the Document Manager.

Lesson 7: Extras

1. Add the following Phase Order Sequence for the Planned Treatment for Chris Jones' tooth #46:

    a) Perm RCT 4+ Canal 1
    b) Comp Build Up 2
    c) 1 Prefab Retentive Post 2
    d) PFM Crown 3

2. Create and prioritize three Planned Appointments from the above Planned Treatments for Chris.

3. Filter Jennifer Campbell's Patient History to display only D02 – Dr. James Molar.

4. Filter Jennifer Campbell's Odontogram to display only H01 – Sarah Thompson.

5. Save a screenshot of the Odontogram in the Document Manager under the Misc tab.

6. Update Jennifer Campbell's recall line to indicate another recall visit in 6 months.

7. Add Cardiac Stent under Jennifer's Medical Alerts with a note indicating it was placed in 2016.