EHR Basics

This outline will guide the user through how to Chart Existing Procedure Codes and complete a Treatment Plan.

The Topics covered in this Outline are:

- Charting Missing Teeth
- Charting Existing Findings
- Charting Conditions
- Adding a Treatment Plan

Charting Missing Teeth

- Select the Patient from the Rolodex
- Click on the EHR Module
- Select the teeth numbers that are Missing on the Odontogram

- Right click on the Odontogram
- Select Missing from the menu
- The teeth will disappear from the Odontogram and be replaced with a red M to indicate the teeth are missing.

**Charting Existing Findings**

- Click on the ![icon](image) to create a new record
- The Chart Add Tab will be added to the EHR
• Select the Dental Treatment Radio Button
• Click on the Full List Tab

• In the Category Column, click on the Category the procedure belongs to
• In the right panel, click on the + to the left of the Procedure code to open the list of the Procedure codes
• From the Expanded list, double click on the correct Procedure to select it
• On the Odontogram, click on the tooth number or surfaces of the tooth

• Click on the Findings Icon
• This will open the Details Tab
• Enter the Diagnosis in the Diagnosis field
• Indicate the location of treatment using the Location Dropdown
• Repeat as necessary

⚠️ **NOTE:** – The Diagnosis Field has Intellisense. As the diagnosis is being typed in, intellisense will attempt to find the Diagnosis
Charting Conditions as Findings

- Select the Procedures Tab
- Select the Radio button to Findings
- In the Category column, select Condition

- In the Right panel, click on the + to the left of the condition code grouping
- From the Expanded list, double click on the correct condition to select
• On the Odontogram, Click on the tooth number
• To add the finding, Click on the Findings Icon
• Repeat as necessary

Adding a Treatment Plan

• Select the Procedures Tab
• Select the Full List Tab
• Select the Dental Txs radio button
• Under the Category column, select the Discipline
• Use the + on the left side of the procedure code grouping to expand the list of procedure codes

  Once the appropriate procedure code has been chosen, chart the corresponding sites on the Odontogram
  Click the Planned button
- A warning will come up to notify that a diagnosis must be added to this procedure
- In the Diagnosis Window, add the Diagnosis by clicking New Item
- Use intellisense to type your diagnosis or search the diagnosis by clicking the (...) button
- Add the Treatment Location

- Click on the Modify Icon 📂 to modify the Planned Treatment
• Navigate to the Tx History Tab
• The Planned Treatment will be found in this tab