

Completing and Approving Treatment

1. With patient selected, open EHR, **Tx History** tab.
2. Select a line of planned TX and right click.
3. Select one to change *Status* from *Planned* to *In Process Tx Visit* or to *Complete Treatments*.

Date	Prov./User	Code	Site	Surf.	Stat	Phase	Location	Do no
(ANESTHETIC (IN MG), RD, TOOTH #, SURFACES, MATERIAL)								
Has medical history been signed by the patient?								
(If Sig Required pink button displays, pt must sign electronically now)								
NEXT VISIT: PROCEDURE AND ESTIMATED FEE								
PATIENT INFORMED?								
04/23/18	J. Student	D2150	12	DO	C	1:0		
04/23/18	J. Student	D2391RT	5		C	0		
05/18/18	J. Student	D2150	31	MO	C	1:0		
03/12/18	J. Student	D2160	20	DOB	P	1:0		
03/12/18	J. Student	D2391RT	6		P	0	REST	K. Hansel Resin-based cor
03/12/18	J. Student	D7140	J		P	1:0	OS	K. Hansel Extraction, erupt

4. Click OK. For students, the treatment will now appear in blue on the Tx History screen indicating that it requires approval. For faculty and residents, the treatment automatically is approved and goes to billing.

5. To send the treatments to billing, faculty MUST approve the change. Click on the aqua-colored chart box at the bottom of the screen.

Patient: lma4 (U17) T7538

6. This opens the *Check Out Patient* window. Faculty approve by entering their approval code, moving all highlighted tx to the *Claim* screen on the bottom, signifying that the treatment charges have gone to *Billing*. Faculty does not have to OK all changes. They can use the ctrl or shift key to select only those items they wish to approve.

T	Date	Provider #	Code	Site	Surf.	Description	S	Discipline	Phase
T	06/15/2012	D200000	D0150			Comprehensive oral ...	C	DIAG	.0

Trx #	Date	Provider #	Code	Site	Surf.	Description	Patient	Insurance	Total	S
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7. Click close and the screen closes, the approved lines of treatment turn from blue to black, and the chart number box (if emptied) turns to grey.