Systems for Dentists

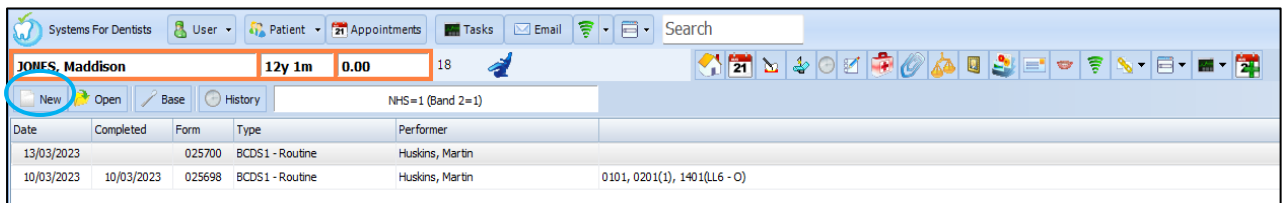# Orthodontic Guide to SFD

Contents

Introduction

This guide should take you through the basics of the orthodontic features in SFD going through various stages of treatment, the overview screen, studies for your images and the referral letters.

How to start an orthodontic claim/ form

To create a course of treatment for a patient you must first open the record. Once the record is open select the **treatment** button.
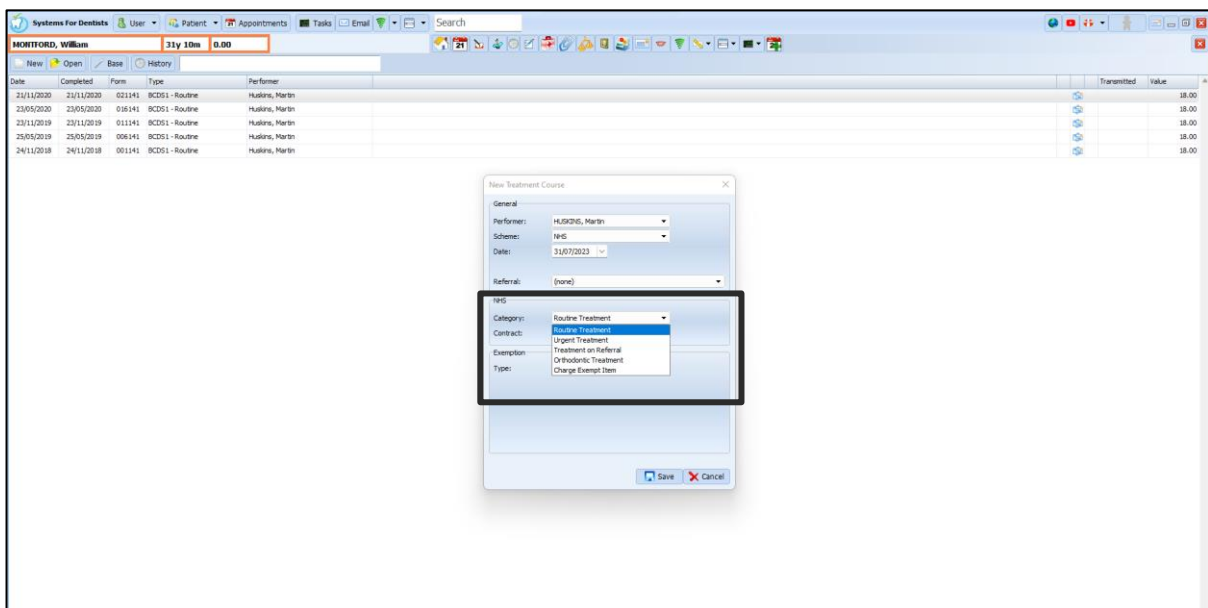

Select **new** from the main menu.

This works the same as general dentistry we simply need to change 1 drop down to select orthodontic mode unless we change it within the setup to always open as orthodontic.


Once you have selected "new" you will have a category box which will allow you to select "orthodontic treatment" from the menu.

However, if you have a performer who only does orthodontics and want to it always select orthodontic over anything this can be done as well. First off we go into the tooth in the top left and select setup.
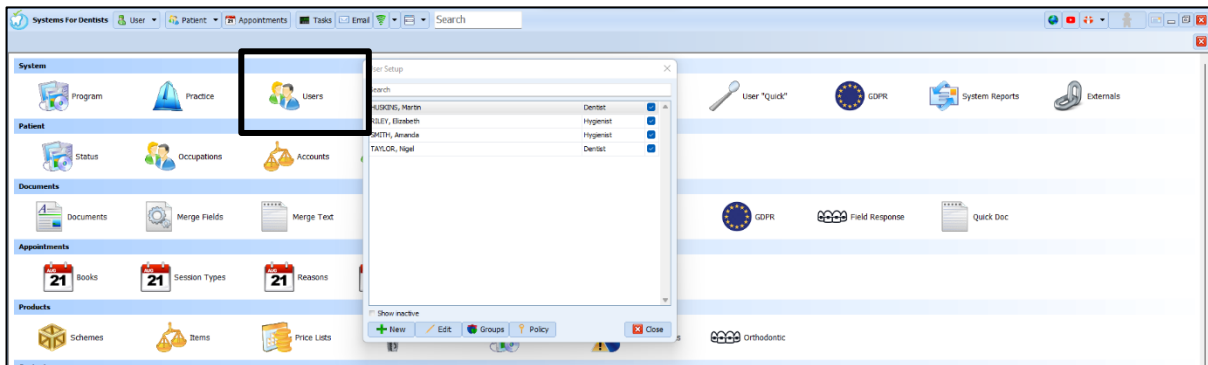
Within this page we select "user" and then which user you would like this to apply too.
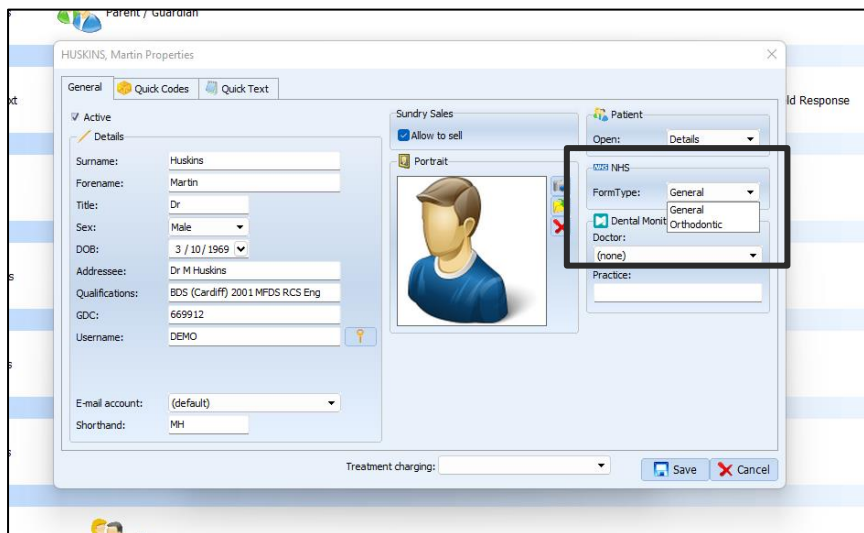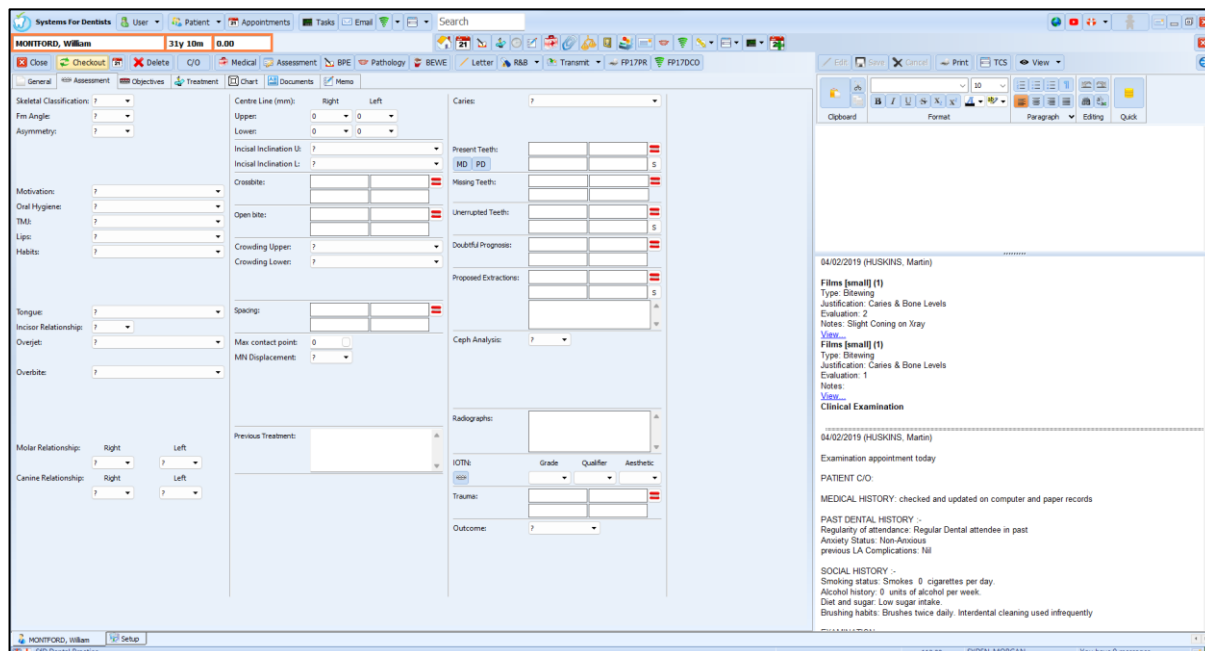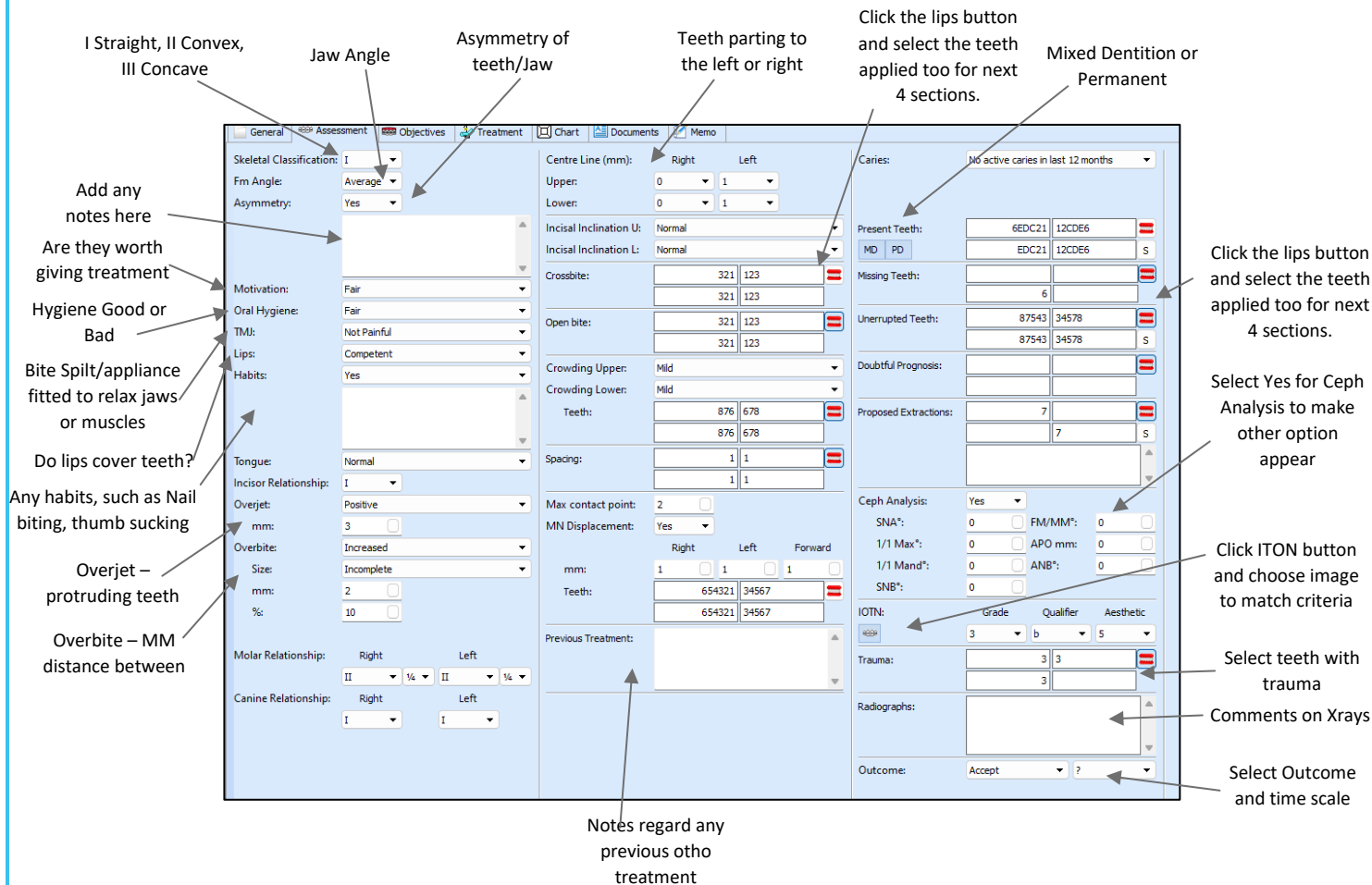

Once you have opened your user you will see we have an option called "form type" in the screenshot.

This will allow you to select the default form the patient will open in when you create the treatment.

For the change to take affect hit save.

Filling out an orthodontic claim NHS

The orthodontic assessment screen is displayed first when you begin to complete a treatment form this is how it will look:

Labels around the assessment screen:

- I Straight, II Convex, III Concave
- Jaw Angle
- Asymmetry of teeth/Jaw
- Teeth parting to the left or right
- Click the lips button and select the teeth applied too for next 4 sections.
- Mixed Dentition or Permanent
- Add any notes here
- Are they worth giving treatment
- Hygiene Good or Bad
- Bite Spilt/appliance fitted to relax jaws or muscles
- Do lips cover teeth?
- Any habits, such as Nail biting, thumb sucking
- Overjet – protruding teeth
- Overbite – MM distance between
- Click the lips button and select the teeth applied too for next 4 sections.
- Select Yes for Ceph Analysis to make other option appear
- Click ITON button and choose image to match criteria
- Select teeth with trauma
- Comments on Xrays
- Select Outcome and time scale
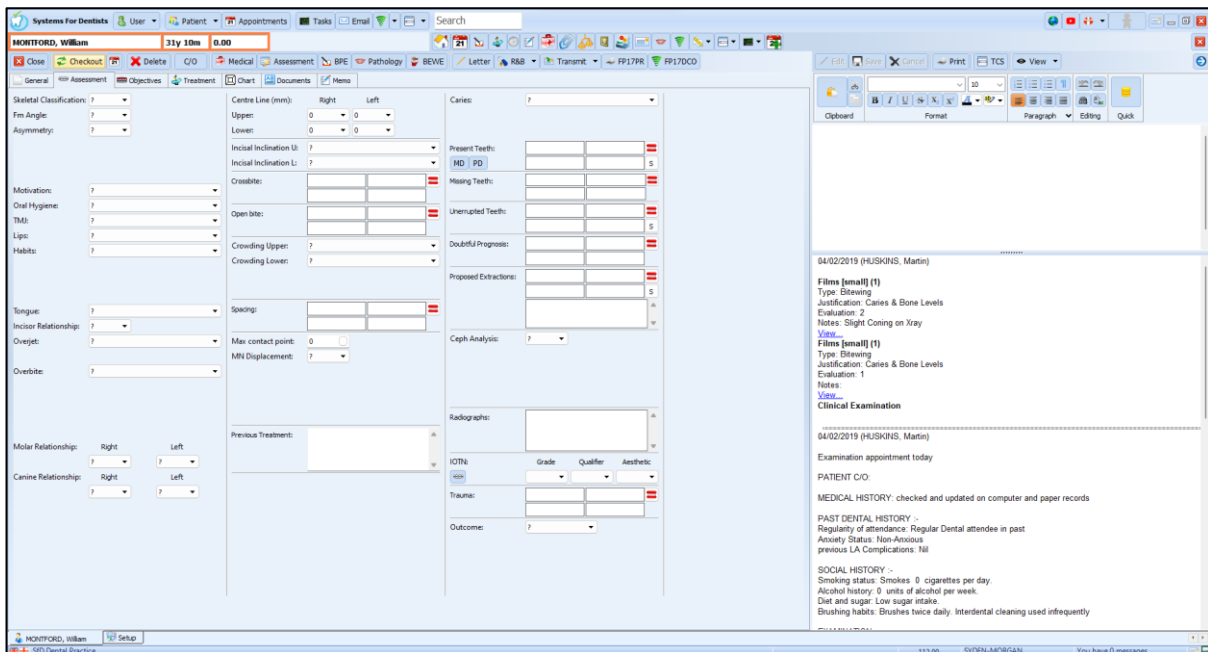- Notes regard any previous otho treatment

You will have some options that do look the same (if you are familiar with the general dentistry side of the software). You have a main options bar with the options: general, assessment, objectives, treatment, chart, documents, and memo.
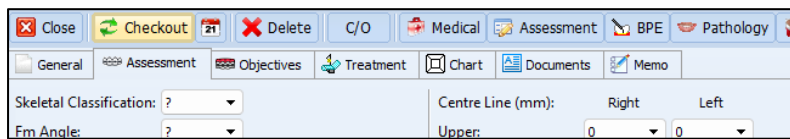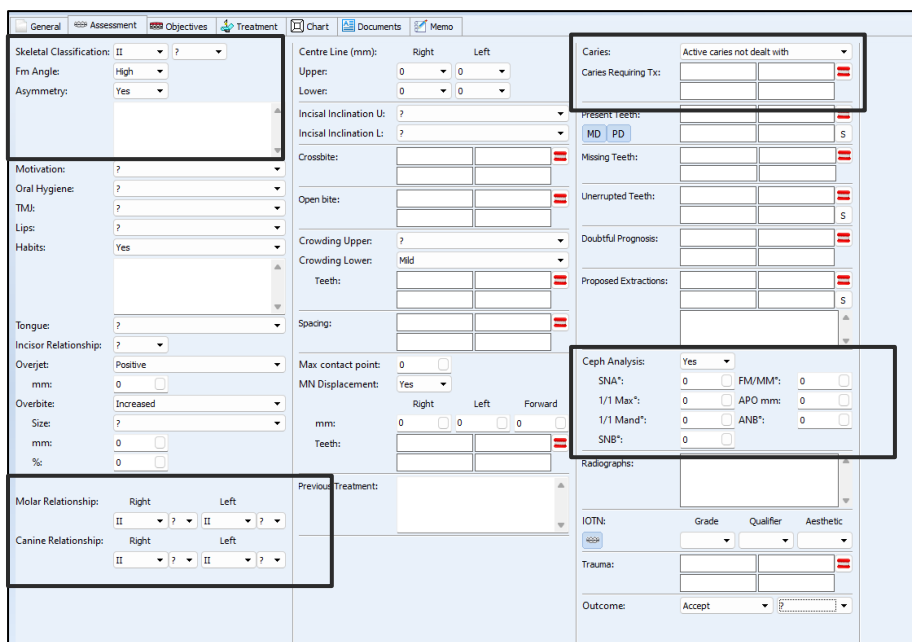

The main options you will be using in terms of NHS Orthodontics will be the general tab, assessment, and objectives.
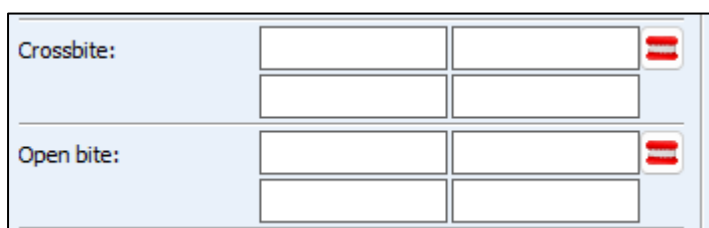
The Assessment Tab.

This is one of the main tabs on the software in which all orthodontics should be familiar with or atleast know about. In here we can fill out options such as the ceph analysis, fm angle, IOTN score and many more. To do so we either have a drop-down box or a text box in which can be filled out.
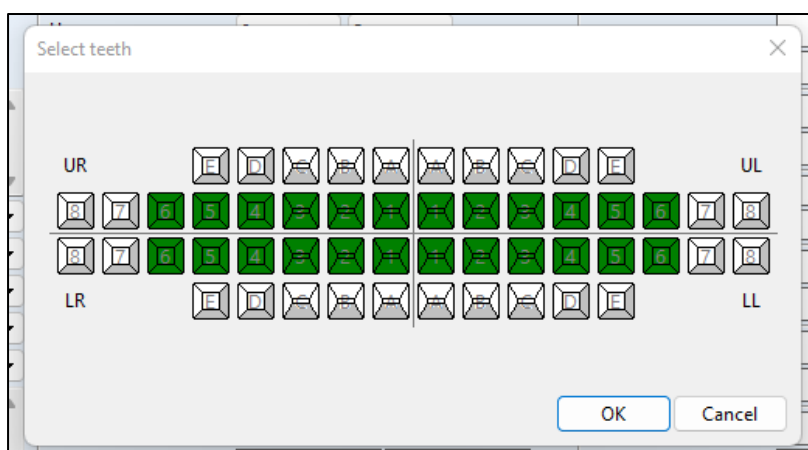

As we go through and fill the information in, we can see that more boxes and more stages appear so we can input more information as we can see highlighted in the screenshot below. This only applies to certain options on the assessment screen.

Anywhere you see a denture icon (highlighted below) this is a way of filling out the boxes adjacent to it. What will appear will be a chart displaying the teeth applicable to the area we are filling in.

This option will bring up a chart view you can either click the teeth individually to highlight them and select them or you can left click and drag multiple teeth at once to both highlight and select those from the chart. Alternatively, to this the boxes you see adjacent to the denture icon can be used to type into which will fill it out all the same.

Here is an example of a completed assessment screen on the system with every possible box appearing on there:

The IOTN score option which you can be use to get the grade, qualifier, and aesthetic.

If you are unsure on the scoring this will help to give you the score depending on the description and allow you to chose an image mirroring to the aesthetic of the patients mouth.
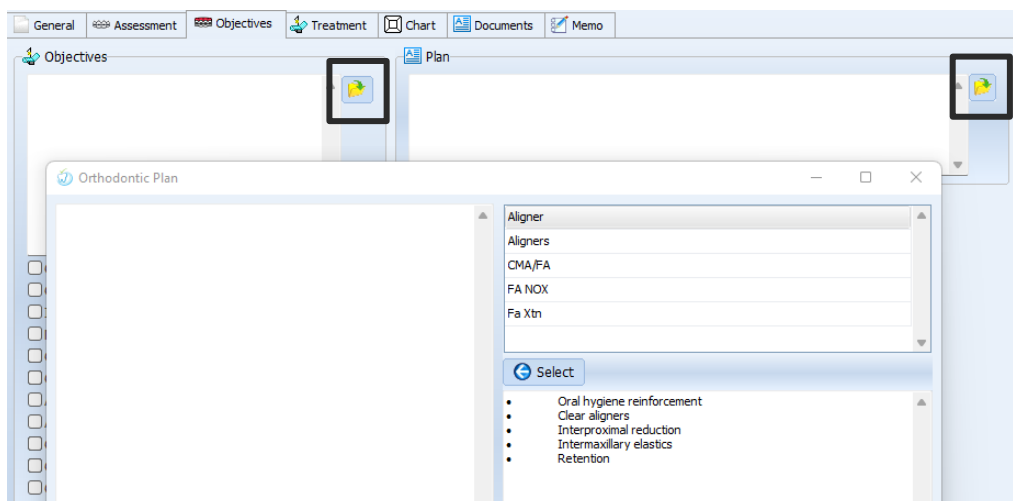
The Objective Tab

The objective tab when opening an orthodontic form for a patient is a screen for adding in the objective you are going to be carrying out for the patient throughout the course of treatment and also and plans you wish to create for the patient.
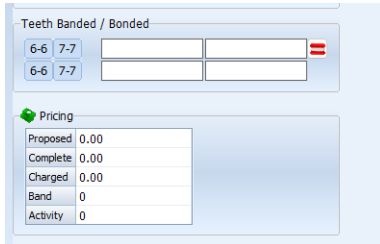
To add an objective select the folder icon. A window will appear to select your object. You can also manually type these objectives in at the same time.

With the objective and plan you can either simply type into each box and create each section as you go or you do have the option to add in templates for each section as detailed below.

On here you have a folder section which will take you into a set of templates either created by the practice or a standard set of templates which can be used to fill out each text block. Alternatively, you can just type into the text box to fill out your plan. How to create these templates will be detailed in the next section of the guide.
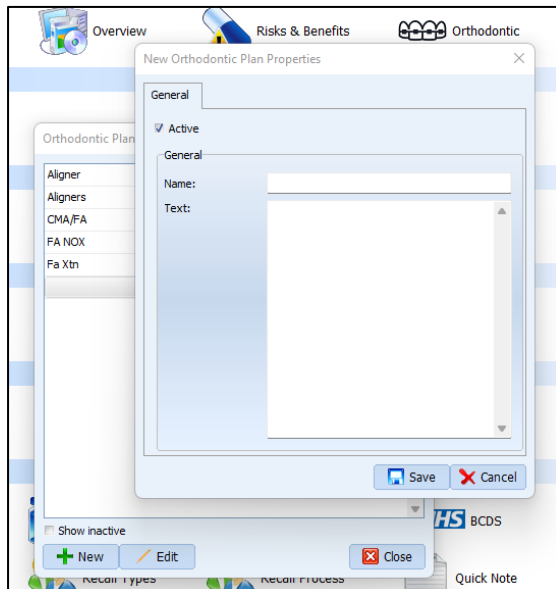
Within the objectives screen you need to select the teeth banded and bonded in which you can either select the preselection of 6-6 or 7-7 or you can use the denture icon again where you can fill this out manually. We also have a pricing section in which will automatically populate once we take a look at the "general" tab.

How to create objectives and plan templates

To create a template for both the objectives and plan we need to take ourselves back into the setup page of the software. This is within Tooth in the top left and then setup.
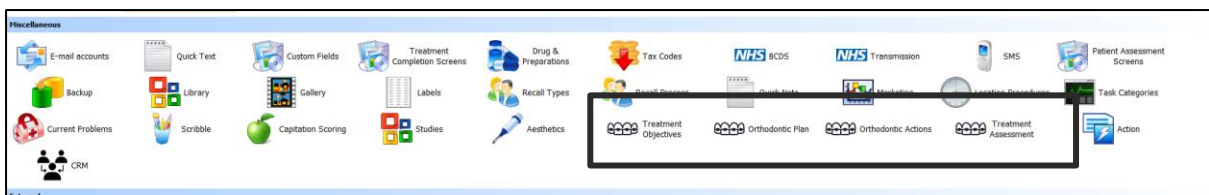
From here you will have a section that is called miscellaneous where you will find 4 options for orthodontic features and setup. The 2 you will use for this section is the "Treatment Objective" and "Orthodontic plan" this will allow you to create your template for each section on the objective page of the treatment.
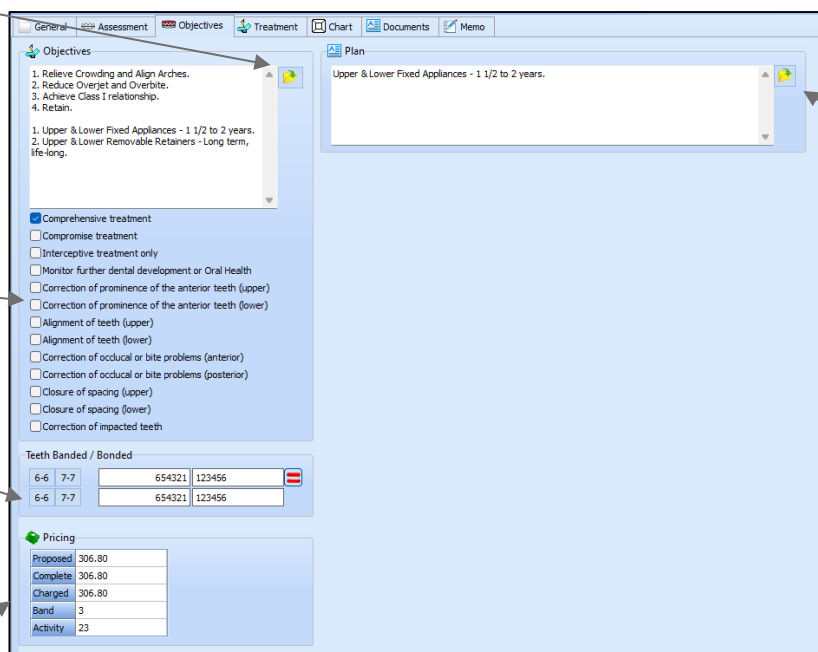
To create a new template each section will have a "new" button where you will then be asked to name the template and add into the text body which will be your actual information that will come across into the box for the information.

1. Click the yellow folder and select objective from the templates

2.Click the yellow folder and select the plan from the templates

3.Check the option appropriate to the patient.

4. Select the number of banded teeth.

Note: Price will not appear until claimed on general Screen

The General Tab

The general tab is possibly the most crucial section on an Orthodontic NHS claim. This is where we can generate the charge for the patient including the banding at the same time.
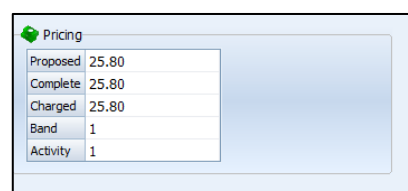
Within the general tab you will have a section called "orthodontic" where you can apply the "assessment/ claim" to generate both the charge and band of the treatment. As long as you have filled in the IOTN on the assessment screen it should automatically populate on the general tab.
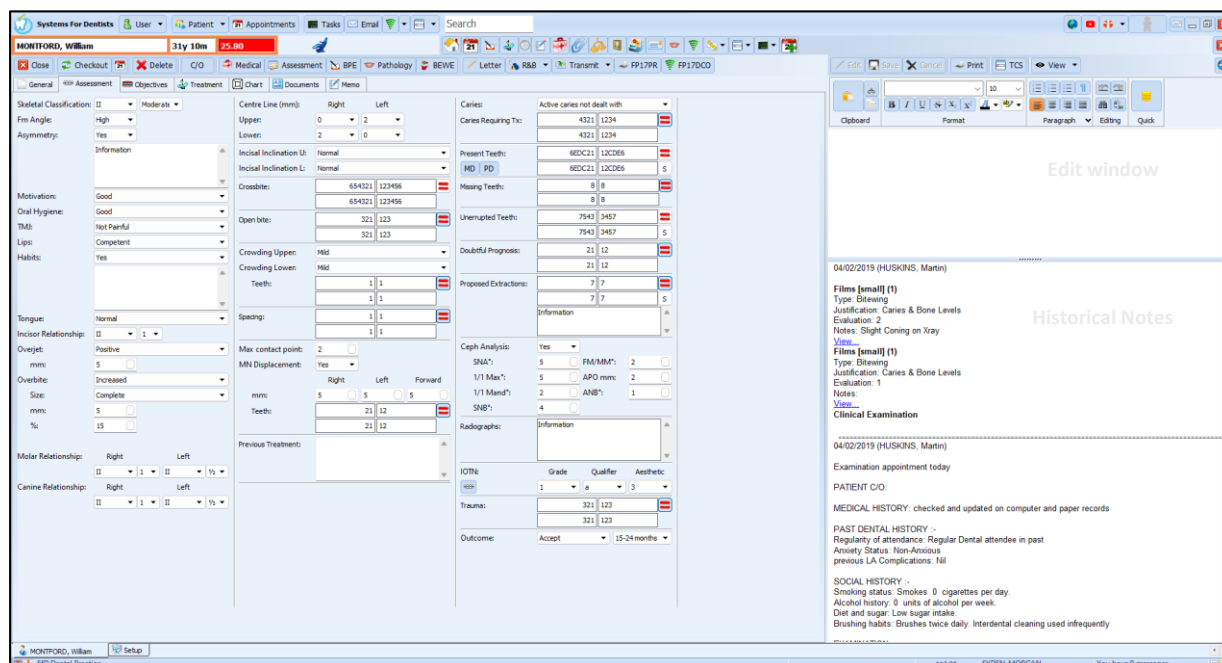
From the drop down list you will see the options in which you can choose from to create your charge.

Once completed the objectives tab will give you a breakdown of the pricing and banding of the treatment form as a whole in which can then be sent off to the board.

SFD_ORTHO_GUIDE_VERS_01
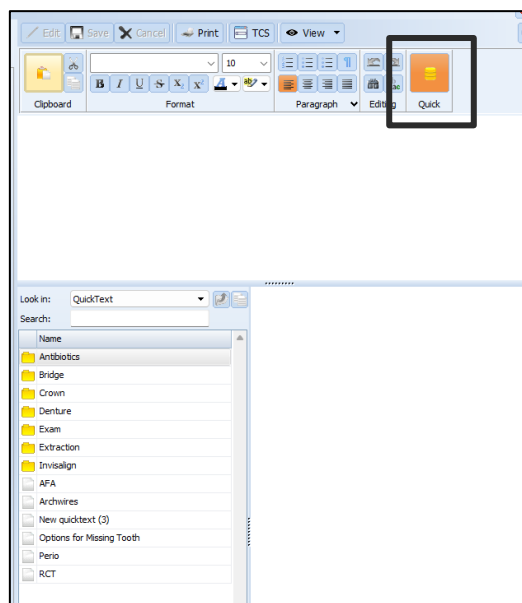
Clinical Notes

What you will be seeing as you are going though and filling out your clinical notes is that on the right-hand side, we have a column which has a bunch of text. This is the section for the clinical notes on a patients record when in a treatment form.

You can just type directly into the edit window to input your clinical notes and click save about it or once again we can create template on the software for this. These are hidden behind the "quick" button on the clinical note section on the right-hand side.

Once selected you will see that where our old notes originally were we have a list of folders and templates that we can select to go through and add into the clinical notes section rather than filling everything out manually.

With this if you do make a mistake or do not finish your notes you can click "edit" up until midnight the same day and amend the notes you created that day.

How to create a clinical note template

Once again, we will be heading back into the setup page of the software. This being the tooth in the top left and then setup. From this screen we will be selecting an option called "quick text" from the miscellaneous section.

From there all you have to do is type your note into the box and save it where you want on the system.
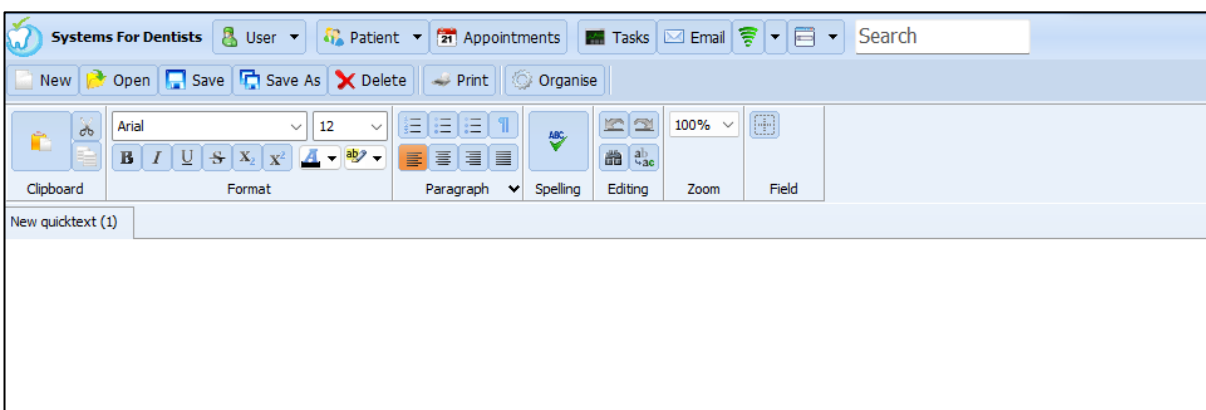
If you do want to edit an existing note please select the "Open" screen this will present you with a list of templates which will allow you to select the one you want to edit and go about saving it to the software again.

What you can also do is add a drop down to the clinical notes where you can choose from a list of already populated options. This can be done using the "field" icon in the top right of the edit screen.
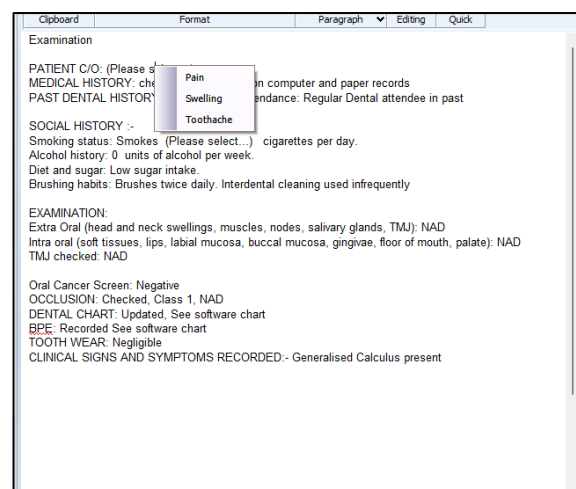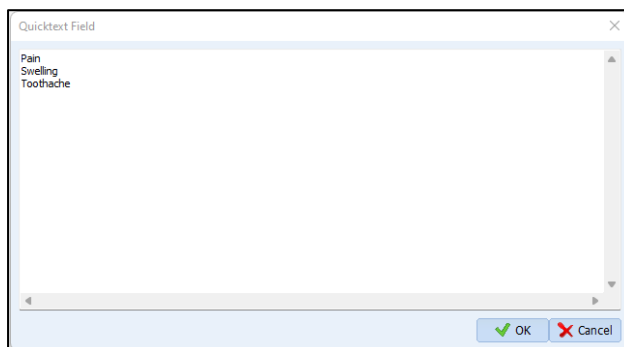
The Orthodontic F5 Home Screen

The F5 screen allows you to track the progress of treatment.

This is where the objectives and plan come in to play when you fill them out on the course of treatment. Now what a lot of performers will do is they will complete their claim and send it off or add in the items to the private form and close it. But you will still have patients coming in for check ups and what not this is where the "F5" screen will benefit performers.

The overview screen can be access by pressing F5 on your keyboard or selecting overview from the further option drop down menu. When you are on a patient profile.

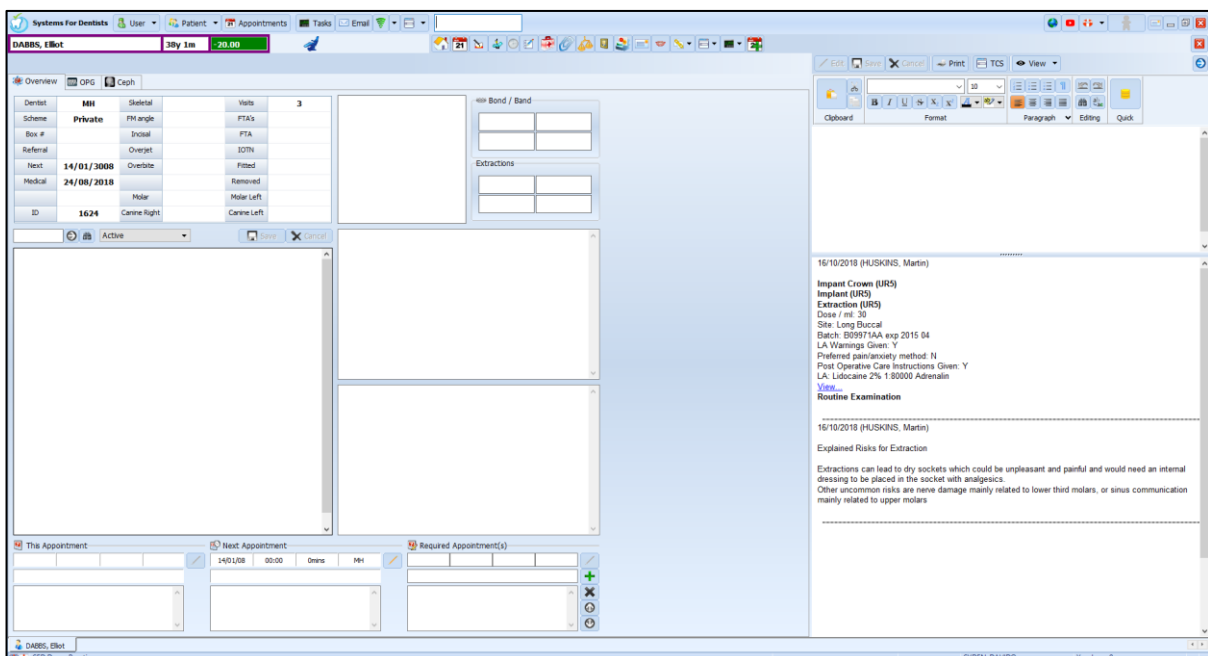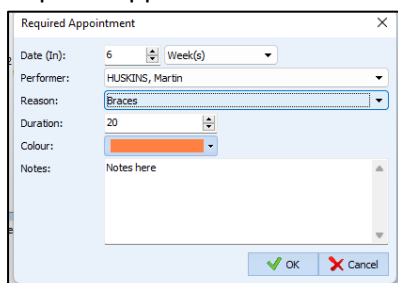The F5 screen allows you to track appointments and add actions/notes to the treatment. This screen will provide a summary of information filled in on the assessment screen within the top right. You will also see a breakdown of the plan and objectives on this screen as well so you can track it as the treatment progresses.


To add the next appointment, click the add button to the bottom right of the screen next to the required appointment. Fill in the required appointment details and click Ok.


For performers this can be the default screen that opens when they open a patients record so they can reference all of the information they need in 1 place.

How to make the F5 screen default.

To make the F5 screen default select tooth and then setup from there go into the "users" section.
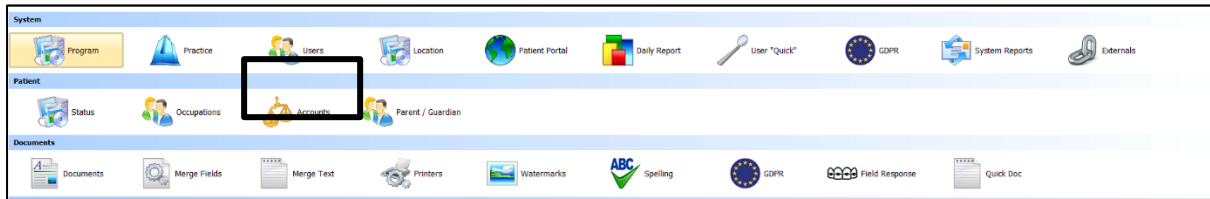
From there we will select the relevant user that wants their patients to open as the overview screen.
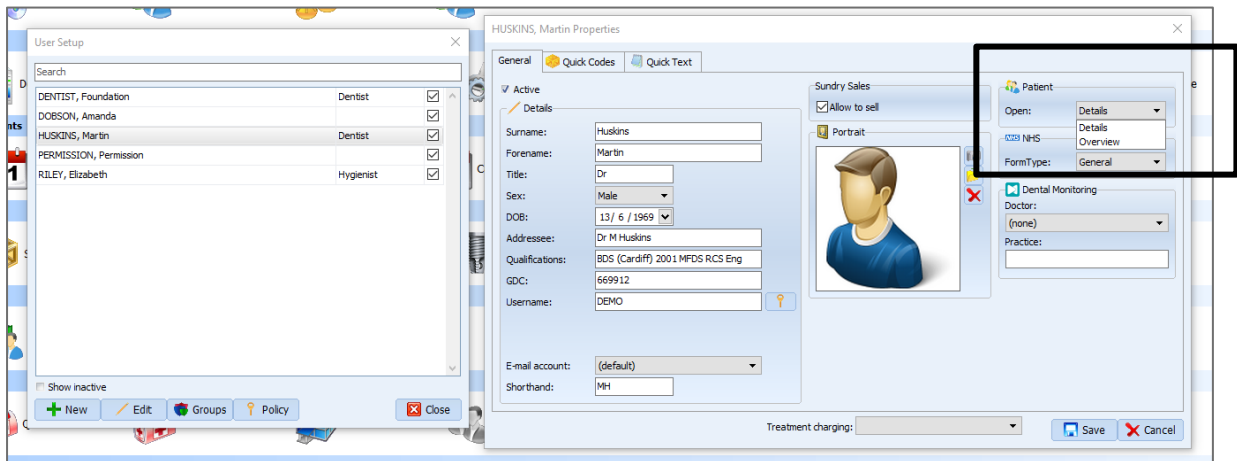
You will then have an option in the top right of the performers record where you can swap between either the details or overview.

Images section on SFD

The images section on SFD is probably one of the most used sections for orthodontists on the system. As this is where the pictures of the patients will be stored whether it be x-rays or initial 6's/ final 6's of a patient.

To access the images section, click the icon highlighted above on a patients record. This will take you into the images for which ever patient you are in.
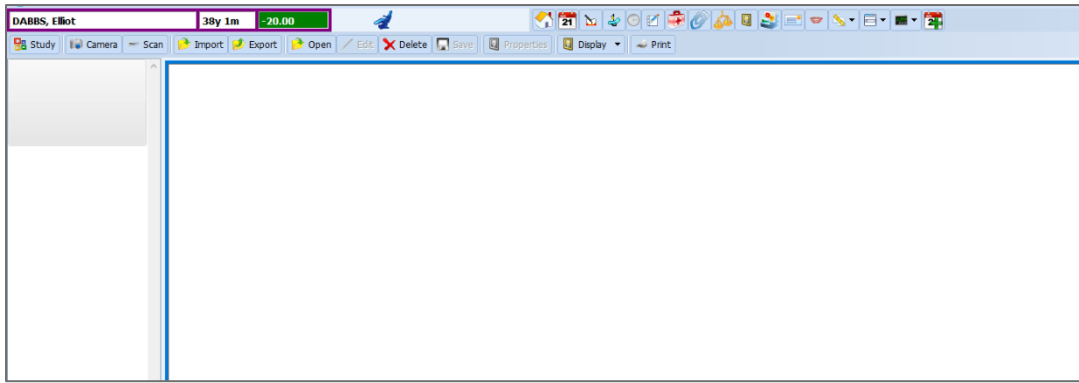
This screen will then appear and you will have several option related to images on the system.

Study allows you to import images in a certain way and automatically gives them a tag of what the image is.
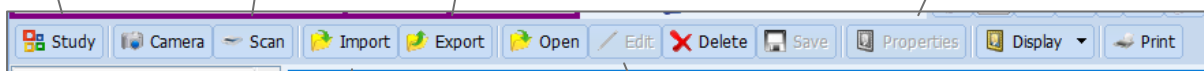
Once again if you scan anything you can have that import directly onto the software

If you have any images on the system you wish to have on your desktop you can export them using this button here

Properties allows you to change things about an image such as the name and what the image is showing

If you have a camera linked to the PC you can take images directly into SFD without having to save them twice.

Importing images is as easy as clicking the import icon you can do multiple images at once through this function

If you have images you want to edit you have a way of doing it just by selecting your image on the left and clicking the edit button along the top
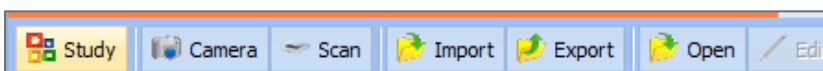
If you are wanting to view more than one image on your screen at a time you can use the display button allowing you to see up to 9 images at once

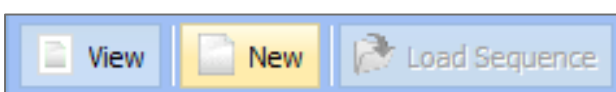## How to complete and image study

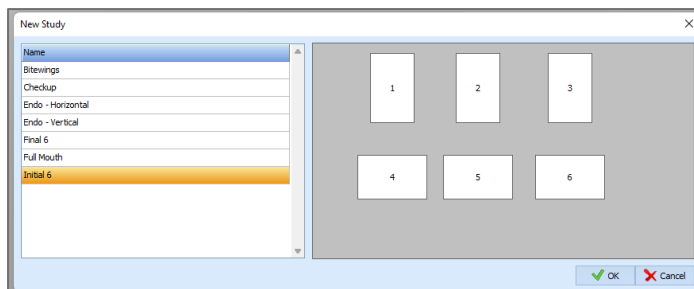Select the Image button in the patient record
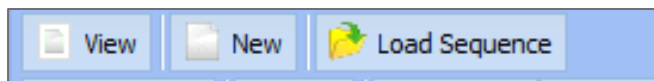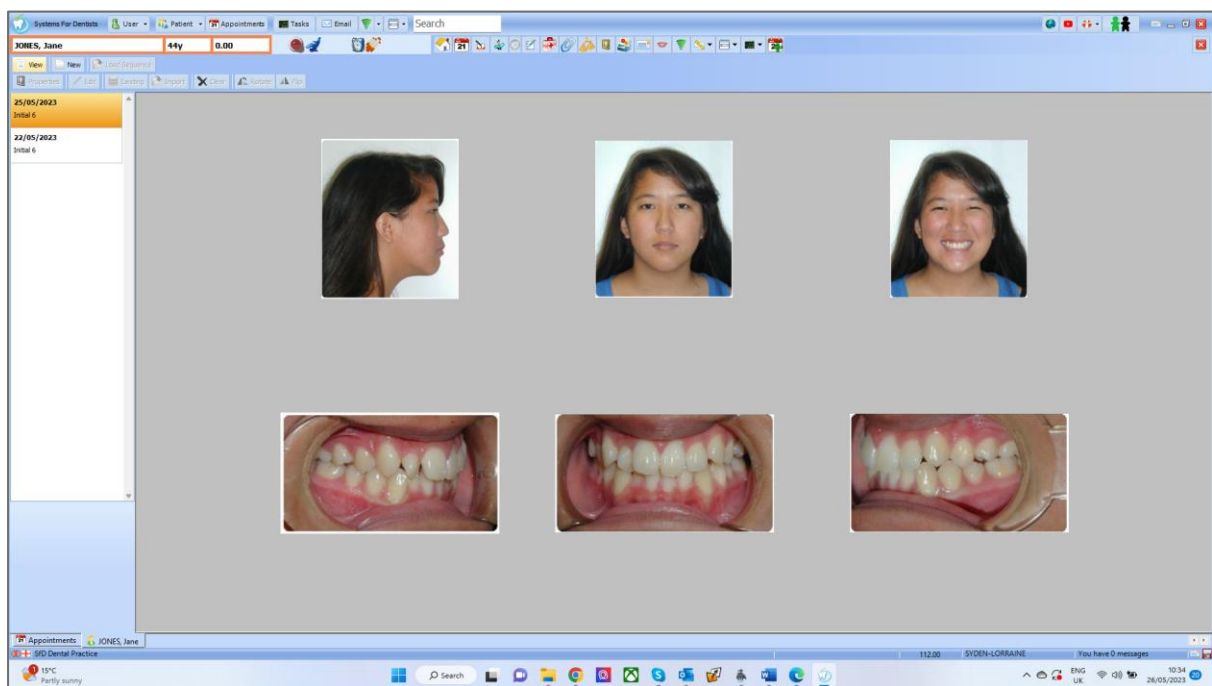
Select study

Click New

Select initial 6 or final 6 or whatever study you wish to load your images into.

Select Load sequence this will then ask you to select a file which you can choose from your computer normally just the images of the patient.

Select your images from the folder structure on your computer and the images will appear in the order the images are stored. If you take them the same way each time this is great because it means you can set up one template and use it every time you want to have a study on the system.

Images can be edited by clicking on the images and selecting edit.
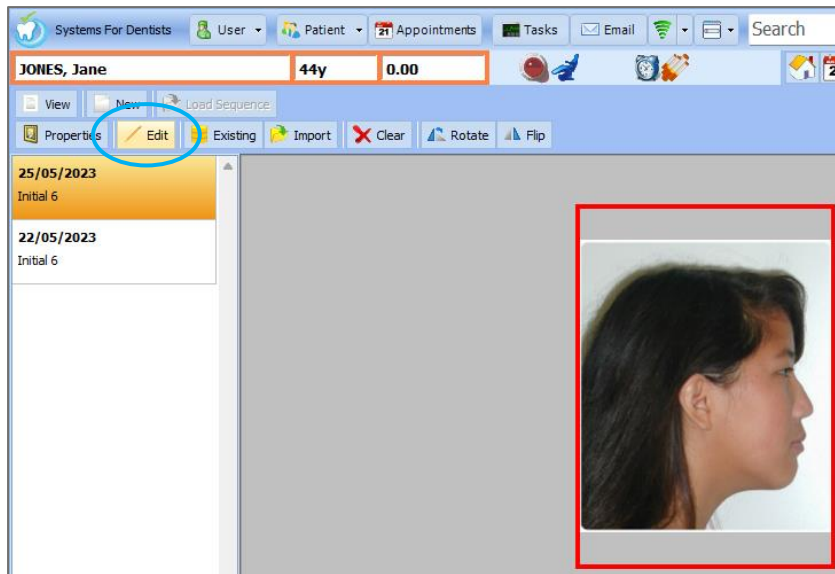
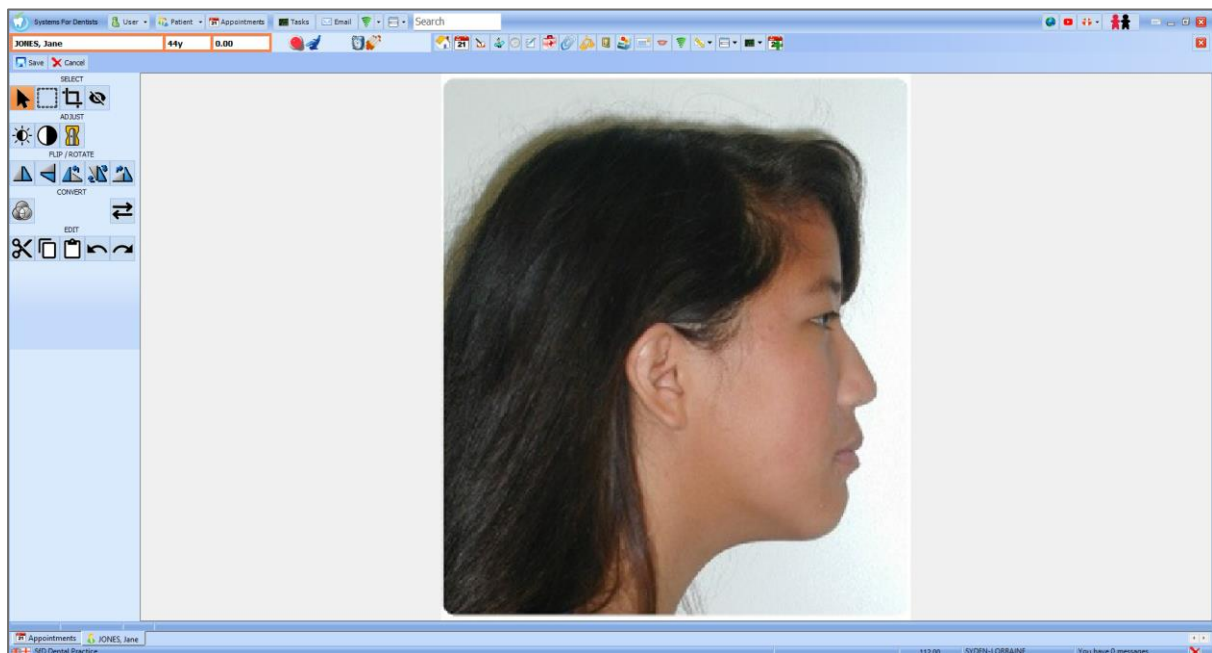Use the edit tools at the top right of the screen to rotate, crop or change colour.
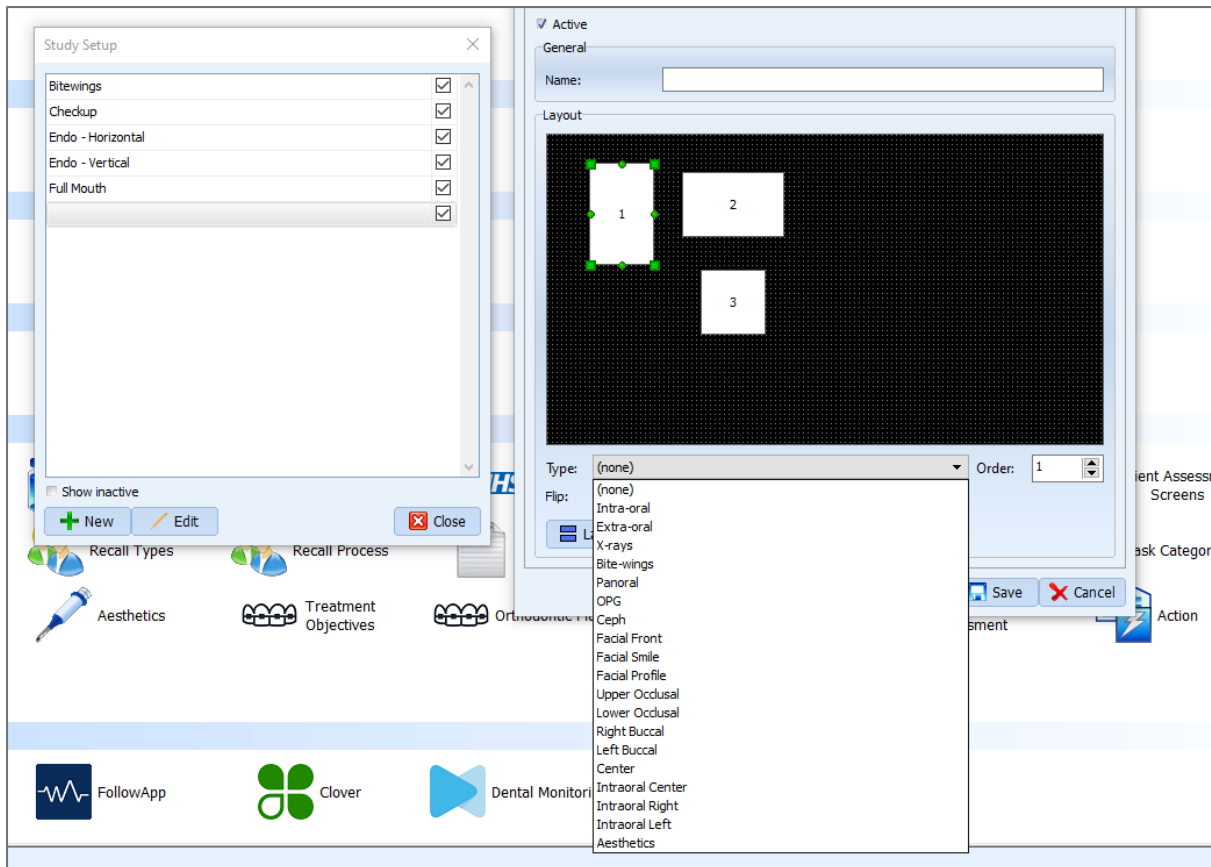

How to create a study template

Once again for this you will have to go back into the setup section on SFD. This can be accessed using the tooth in the top left and then selecting setup.

From there scroll down to the bottom of the setup page and within "miscellaneous" you will have a "studies" option.

From there you can select the "new" option which will bring a box up that you can select from 3 options whether it be "portrait", "landscape" and "square" these will appear like the boxes labelled 1, 2, and 3 on the image above. When you are happy with their position you can select the type the image is this will help you in creating your documents at a later date.
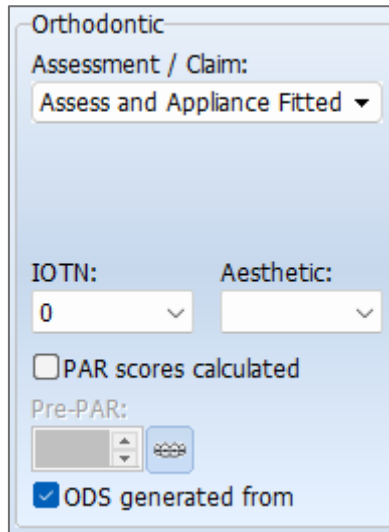
You can then go and use this study within your images section on a patients record.

Claiming NHS Orthodontic Treatment in SFD

How to submit a Assess & Review/Refuse/Applicane Fitted claim

To claim for a Assess & Review/Refuse/Applicance Fitted the user will need to create a new course of treatment and navigate to the general tab of the treatment form.

Within the general tab there is a Orthodontic section which contains the "Assessment / Claim" section


Within the "Assessment / Claim" dropdown option the user will find the options for Assess & Review, Assess & Refuse and Assess and Applicance Fitted.

By selecting the claim type it will then generate the correct UOA value for the claim automatically.

How to select the Clinical Dataset for a Orthodontic Claim

Within a course of treatment a practice has two ways to update the clinical dataset of a claim which is either to add the treatment items to the treatment plan which will automatically assign the clinical dataset or the alternative is to manually update the clinical dataset.

To add orthodontic treatment to the treatment plan the user will need to access the **Treatment** tab of the treatment form.
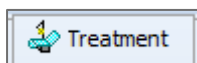
Withing the treatment tab the user will be able to see a list of all treatment codes available under the NHS scheme which will include orthodontic items. This also includes a category list including Orthodontic Services and a search option.

To apply a treatment item to the plan the clinician just needs to double click on the treatment they are doing for the patient.

Once ticked on the plan this will then automatically assign the items selected on the treatment plan to the dataset of the NHS claim.

If the clinicians would prefer to manually enter the dataset then this can be done from the **General** tab of the treatment form.

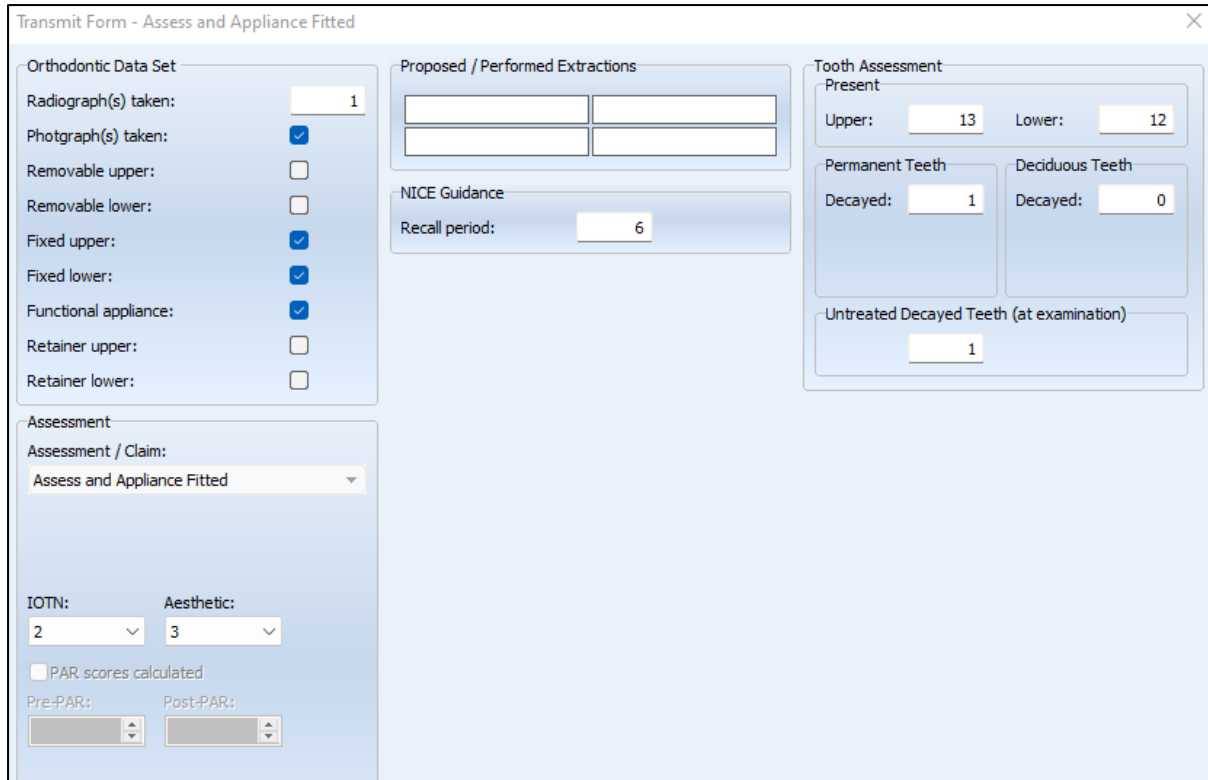Within the general tab there is a Orthodontic section which is for the Orthodontic claim but it also includes a tick box for "ODS generated from".

If the ODS is then unticked it allows the user to manually adjust the clinical dataset when transmitting the claim. To do this the user just needs to select transmit.
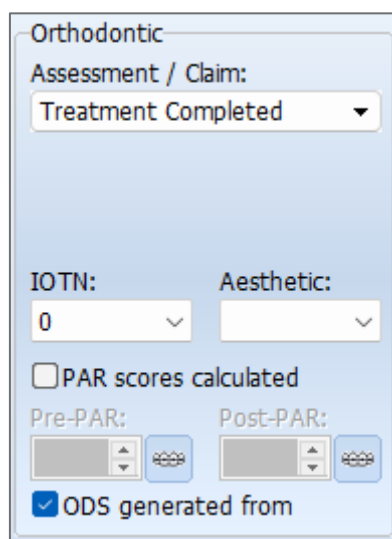

On the transmission form the clinical dataset is available to adjust as required prior to the final sending of the claim.

SFD_ORTHO_GUIDE_VERS_01

The clinician just needs to enter the number of radiographs and tick the treatments they have performed for the patient prior to then clicking ok to submit the claim.
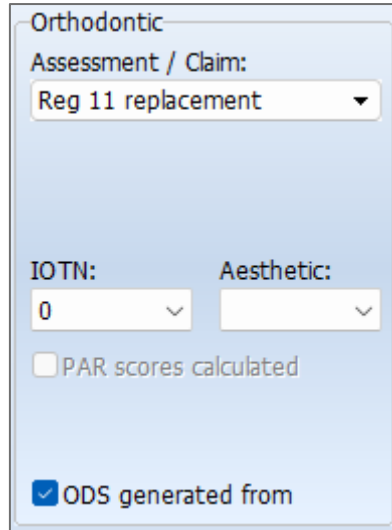
How to submit a Treatment Completed claim

To claim for a Treatment completed claim the user again will need to create a **New** course of treatment and then navigate to the general tab of the couse. Within the general tab the claim type can be selected as Treatment Completed or alternatively options like Treatment Abandonded and Treatment Discontiued are also available.

For a Regulation 11 Replacement claim the user will again need to create a New course of treatment and then navigate to the general tab of the course. Within the general tab the course can be set as a Reg 11 Replacement or Reg 11 Replacement x2 from the "Orthodontic Assessment/Claim" section.

By selecting this claim type the Regulation 11 Replacement charge for the patient will automatically be applied to the course and then added to the pateints account when the user selects **Checkout**.