Purpose:
To speed patients’ progress towards a disease-free and stabilized oral health status.

Guideline Statement:
To focus our dental care on moving patients toward stable oral health via the completion and tracking of treatment plan phases.

Application:
All dentists

Exceptions:
None

Supporting Information:
HRSA has the following treatment plan completion (Phase I) expectations for dental care:

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-30%</td>
<td>Poor</td>
</tr>
<tr>
<td>30-50%</td>
<td>Average</td>
</tr>
<tr>
<td>50-70%</td>
<td>Excellent</td>
</tr>
<tr>
<td>&gt;70%</td>
<td>Outstanding</td>
</tr>
</tbody>
</table>

Higher percentage rates correlate to better population management.

Procedure:
1. Patients receiving comprehensive (D0150), periodic (D0120), and under three years of age (D0145) examinations are the focus of this protocol.
2. **Phase I completion** (*PhsI in the EHR) reflects that the patient has been moved to stable oral health. This is the minimal and expected level of care for all our patients. Phase I completion is documented, once all of the following conditions are met:
   a. Urgent consultations, evaluations, and any second opinions have been completed.
   b. Periodontal status is stable.
      i. No pending SRP is needed. Minimally, it must be scheduled already.
      ii. Patient may have slight/mild gingivitis diagnosis.
   c. All restorative procedures (basic restorations) have been completed.
      i. There should be no active caries in the patient’s mouth.
   d. All endodontic procedures have been completed.
      i. There should be no active periapical disease in the patient’s mouth.
   e. All urgent extractions have been completed.
      i. No active disease state remains in the patient’s mouth.
   f. **EXCEPTIONS:**
i. If the patient declines treatment for any of the above, and that has been properly documented in the chart, phase I completion should be documented.

ii. If the patient has been discontinued or terminated from care.

3. **Phase II completion** (*PhsII in the EHR) reflects restoration of complete function and esthetics for the patient that requires laboratory-based treatments. It is to be documented, once all of the following conditions are met:
   a. All non-urgent consultations, evaluations, and any second opinions have been completed.
   b. Elective functional and esthetic restorative procedures have been completed.
   c. Fixed prosthetic and implant services included in the treatment plan have been completed.
   d. Any advanced endodontic procedures have been completed.
   e. All pre-prosthetic and/or elective oral surgery has been completed.
   f. Removable prostheses have been delivered.
      i. Patient with accepted fit, function, and esthetics.
   g. Any orthodontic treatment required has been completed or referred with proper documentation.
   h. The patient is moved into recall status with documented recall schedule.
      i. Patient is actively managing their care.

4. Each time a new exam/recall is completed, minimally another phase I completion is expected within the chart documentation.

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