

Dental Treatment Plan

Planned by phase, priced by phase, and profitable at every one of them.
Worked example on the next tab.

THE CASE

Practice	
Patient	
Case	
Date	

START HERE · YOUR NUMBERS

all four. Nothing below calculates until they are in.

What an hour in your chair needs to produce	
Rate for time spent away from the chair	
Margin you want on a case this demanding	
Average insurance write-off on this patient's plan	

Every procedure code has its own write-off. Use the average percentage across this plan. Zero if the patient is fee for service.

Start here. Fill in the four deep gold cells above. Every number on this sheet stays blank until you do.

No hourly number yet, or want to pressure test the one you use? Work it out free at casefeepro.com/hourly-goal-calculator

No signup and no email. Takes about a minute. If your own number comes out well below the calculator, that gap is what your case fees have been giving away.

HOW TO READ THIS SHEET

Deep gold, heavy border. The sheet cannot do anything until these are filled in.

Light gold box. Type your number here as you build the case.

White box. A formula lives here, do not type over it.

Grey box, marked n/a. That column does not apply on that row.

- Fill in chair hours and lab. The sheet works out what the case costs you and what it should be priced at.
- Then put in what your practice management software charges for each phase. The sheet takes off the write-off and compares.
- Phase names are a starting point. Rename them, delete rows you do not need, add rows you do.
- Ahead or behind answers the question that matters: if the patient stops at that row, are you still up on the case?

START HERE

fill this in

auto calculated

do not use

Phase	Type	Chair hrs	Chair cost	Lab, sedation, materials	Cost to you	Fee at your margin	What your PMS charges	You collect	Above cost	Ahead or behind
	<i>fill in</i>	<i>pick one</i>	<i>fill in</i>	<i>auto</i>	<i>fill in</i>	<i>auto</i>	<i>auto</i>	<i>fill in</i>	<i>auto</i>	<i>auto</i>
Consult and diagnostic	Chair									
Treatment phase	Chair									
Healing phase	Between visits	n/a								
Records phase	Chair									
Lab phase	Between visits	n/a								
Try-in / delivery attempt	Chair									
Lab phase	Between visits	n/a								
Final delivery	Chair									
Phases subtotal										
Coordination and workup, not a visit	n/a			n/a			n/a	n/a		n/a
Case total										

Chair hrs and Chair cost on the total line are chairside only. Coordination is away-from-chair time, so it is in Cost to you and in Fee at your margin, on its own row above. You collect = what your PMS charges, less the write-off. Above cost and Ahead or behind stay blank on a row until you put a PMS fee on it, so an empty column never reads as a loss.

WHAT YOUR SOFTWARE WOULD HAVE COLLECTED ON THIS CASE

What this case needs, at your margin

What your PMS collects, after the write-off

The gap

	the Fee at your margin column, totalled. Coordination included.
	the codes on this case, less the write-off on this plan
	negative means your software prices this case below what it needs to earn

Appointments in the chair

Worst point in the case

	the lowest Ahead or behind ever gets. Negative is what you are out if the patient stops at the worst moment.
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Assumptions and sources

- No figure in this sheet is supplied by CaseFee Pro. Every number is one you enter.
- Chair cost = chair hours times your hourly rate. Cost to you = chair cost plus lab, sedation and materials.
- Coordination time is priced at your away-from-the-chair rate. It is counted in Cost to you and in Fee at your margin, and deliberately left out of the Chair hrs and Chair cost totals so those two still divide back to your hourly rate.
- Fee at your margin = cost to you on that phase, times one plus your margin. It is a reference, not what you collect.
- You collect = what your PMS charges on that phase, less the write-off percentage you entered.
- Above cost = what you collect, less what that phase costs you. Ahead or behind is every phase up to that row, added up.
- One average write-off percentage is applied to every phase. Every procedure code has its own write-off in the real plan, so treat the result as a close estimate rather than an exact figure.
- Your hourly rate is assumed to already cover overhead and what you want to take home. Nothing here is a practice profit figure.
- Phase names and the chair versus between-visits split were specified by Dr. Schmidt, 2026-09-20.
- The sheet is protected so a stray keystroke cannot wipe a formula. Use Review then Unprotect Sheet to restructure it. There is no password.

Dental Treatment Plan

A worked example, already filled in. Invented figures, including the PMS fees. Not any practice's real numbers.

THE CASE	
Practice	Your practice
Patient	Example patient
Case	Six anterior crowns, high lip line
Date	2026-09-20

START HERE · YOUR NUMBERS	all four. Nothing below calculates until they are in.
What an hour in your chair needs to produce	\$800 / hr
Rate for time spent away from the chair	\$250 / hr
Margin you want on a case this demanding	20.0%
Average insurance write-off on this patient's plan	30.0%
Every procedure code has its own write-off. Use the average percentage across this plan. Zero if the patient is fee for service.	

Phase	Type	Chair hrs	Chair cost	Lab, sedation, materials	Cost to you	Fee at your margin	What your PMS charges	You collect	Above cost	Ahead or behind
	fill in	pick one	fill in	auto	fill in	auto	auto	fill in	auto	auto
Consult and diagnostic	Chair	0.75	\$600	-	\$600	\$720	\$250	\$175	(\$425)	(\$425)
Treatment phase	Chair	2.50	\$2,000	\$1,200	\$3,200	\$3,840	\$8,400	\$5,880	\$2,680	\$2,255
Healing phase	Between visits	n/a		-	-	-	-	-	-	\$2,255
Records phase	Chair	1.00	\$800	-	\$800	\$960	-	-	(\$800)	\$1,455
Lab phase	Between visits	n/a		\$2,100	\$2,100	\$2,520	-	-	(\$2,100)	(\$645)
Try-in / delivery attempt	Chair	1.50	\$1,200	-	\$1,200	\$1,440	-	-	(\$1,200)	(\$1,845)
Lab phase	Between visits	n/a		\$350	\$350	\$420	-	-	(\$350)	(\$2,195)
Final delivery	Chair	1.25	\$1,000	-	\$1,000	\$1,200	-	-	(\$1,000)	(\$3,195)
Phases subtotal		7.00	\$5,600	\$3,650	\$9,250	\$11,100	\$8,650	\$6,055	(\$3,195)	
Coordination and workup, not a visit	n/a	2.00	\$500	n/a	\$500	\$600	n/a	n/a	(\$500)	n/a
Case total		7.00	\$5,600	\$3,650	\$9,750	\$11,700	\$8,650	\$6,055	(\$3,695)	(\$3,695)

Chair hrs and Chair cost on the total line are chairside only. Coordination is away-from-chair time, so it is in Cost to you and in Fee at your margin, on its own row above. You collect = what your PMS charges, less the write-off. Above cost and Ahead or behind stay blank on a row until you put a PMS fee on it, so an empty column never reads as a loss.

WHAT YOUR SOFTWARE WOULD HAVE COLLECTED ON THIS CASE

What this case needs, at your margin	\$11,700	the Fee at your margin column, totalled. Coordination included.
What your PMS collects, after the write-off	\$6,055	the codes on this case, less the write-off on this plan
The gap	(\$5,645)	negative means your software prices this case below what it needs to earn

Appointments in the chair	5
Worst point in the case	(\$3,195) <i>the lowest Ahead or behind ever gets. Negative is what you are out if the patient stops at the worst moment.</i>

Same formulas as the Treatment Plan tab. Nothing here is any practice's real fees. The assumptions behind every line are listed at the bottom of that first tab.