LSU Health New Orleans School of Dentistry

# axiUm User Guide

**Kathy Hansel** 



# How to use this manual:

Faculty, Residents, Students- this manual is a printed version of the topics listed on the axiUm Help page in the LSU School of Dentistry Learning Center. Training exercises, approval codes and department specific materials are provided during training sessions.

**Staff-** cashiers, hospital admit techs, dental assistants- training materials for specific duties related to each position and department are provided during individual training sessions.

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		AxiUm User G	iuide	
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		504.941.81	39	
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#### Access to AxiUm:

Axium is installed on clinic and library computers only. To accesss axiUm on your personal laptop, see the instructions below.

Off Campus Citrix Storefront

- 1. Go to LSU Health New Orleans School of Dentistry Home Page http://www.lsusd.lsuhsc.edu/
- 2. Select Quicklinks on upper right Select Citrix Storefont from dropdown menu- Use LSU username & password
- 3. Select APPS button when LSU Health window opens, select Axium icon- log on using axiUm logon and password
- 4. To access Schick (CDR Dicom), select DESKTOPS button in LSU Health window- Desktop-New icon
- 5. Hit Start button lower left corner of Citrix window
- 6. Select Remote Desktop Connection (computer name : Isusd-terminal)
- 7. Connect
- 8. Use LSU username and password
- 9. CDR Dicom for Windows opens Schick radiographs program.



On Campus

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Citrix Storefront

- 1. Access axiUm through Remote Desktop Connection
- 2. Go to Start> in Search field, enter "Remote Desktop"
- 3. When Remote Desktop Connection window opens- enter in Computer name : Isusd-terminal
- 4. Connect
- 5. Use LSU username and password
- 6. Double click on Axium icon- use axium username and password
- 7. Hit Start button in this window to find CDR Dicom (Schick radiographs) program.

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#### **Scheduling Patients**



- 1. If the book you wish to schedule in does not display, click on **book icon** in upper right hand corner of scheduler screen to select scheduling book. (Will open to the book you use most often)
- 2. **Double click** on beginning of desired appointment time slot in your column.
- 3. type in last name or chart # of patient in rolodex window- or select patient from list at right of window- Enter

Rolodex (Select Patient)													
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Name	Chart #	Contact Phone	BirthDate	ld		TRAINING, Patient 02 (3287)							
TRAINING, Patien 23	3297	H: (504) 555	1/1/1965			TRAINING, Patient 04 (3304)							
TRAINING, Patient 0	3286	H: (504) 555	7/20/1999			TRAINING, Patient 05 (3314)							
	0007	UL (CON FEE				LTBAINING Patient 06 (3326)							

- 4. double click on patient name -
- 5. choose appointment length by choosing Appt Code
- 6. In the New appointment window, click on **Tx Plan** button
- 7. **move procedure** you plan to do at this appointment from Planned Treatments (left side) to Appointed Treatments (right side)- Close
- 8. hit Accept in New Appointment window

New Appointn	nent			×
Patient TRAINING, F	Patient 66 - 3347	Appointmen Provider 2nd Provide	ıt D200000 r 5	Accept Cancel
New Orleans, Home Work Mobile Other Contact	LA, 70119 (504) 555-5555 () () () () Home	Appt. Code Tx Discipline Appt. Status	3HR	Add'l Providers Tx. Plan Recalls
Pt Information Pt Status Time Pref. Time	Active Patient	Appt Details Time	s Fri, Jun 22, 2012 8:30 am to 11:30 am	Notes
Pt Now Due Tx Plan Total	0.00	Chair Made on Last user	315 Fri, Jun 22, 2012 íf possible 🥅 Short Notice	R
Reason			A	[

To open a chart -Right click on an apointment – select patient to open patient record.

**Reschedule**- right click on appointment slot- select reschedule- appointment slot turns yellow- go ahead to new appointment- drag yellow appointment to new appointment slot- double click to insert appointment.

**Cancel, fail, delete appointment**- **right click on appointment slot**. Always indicate if patient failed, canceled less or greater than 24 hour notice. Only use delete if you made appointment by mistake. This will display in patient card. Click on patient name in status bar at bottom of screen TRAINING, Patient 1 (M51) to open patient card.

# Selecting a Patient Via the Rolodex

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- 1. Click on Rolodex button.
- 2. In name field, type in the last name, (and as little of the first name as is necessary to pull up a reasonable list of names) You can also search by chart #, phone number (omit area code), birthdate, and first name (,Mary). If you fail to adequately narrow down your search (eg. Smith) you significantly increase search time and number of names to scroll through.
- 3. Click on the patient's name. Make sure that the patient's name displays in the bottom name field.
- 4. Check the patient's demographic data to insure you've selected the correct record and that the data is current. Corrections should be made by the Business Office.
- 5. To hold the name in your notepad for easy selection on another day, check the box on the left. If the patient's name is in the notepad, a single click will select the patient.

<u>Opening Charts from other modules</u>: Selecting Patient on top toolbar allows you to open previous patient's chart and those patients listed in notepad list.



# axiUm cheat sheet for Personal Planner



Personal Planner     Lists CIP Procedures Patient Contact List Production Report Posts	2- S 3- Hit s	ort					
	Provider G1234567 User Postgrad, John						
						_	Reason
Unapproved Assigned Pts Appointments Chart Requests Pt Ne	eds   Overdu	ue Pts   Assigne	d Forms	-		A	ppointment Treatments
S P Type Pt Name Pt Chart	Pho	one#	Date	Time	Clinic	G	o To Appointment
Active Training, Axium 28812	(504	4) 555-5555	06/08/2015	08:00 AM	Juniors	S	elect Patient

# Unapproved tab- To see if any of your patients' treatment is still unapproved:

- Select the unapproved treatment tab... choose "date from" for the date range desired... hit search button
- Check this on a weekly basis.

## Assigned Pts tab- To get a list of patients assigned to you:

- Select the Assigned patients tab... hit the search button (magnifying glass)
- This module defaults to your provider number and you will see a list of your assigned patients
- Make sure that the "date from" button at the top is set to a date back to beginning of clinic to see a full list.
- You can highlight a patient's name in the list...right click to select patient... you can now go to the dental chart for that patient.

#### Appointments tab- To search for your appointment schedule:

- Select the Appointments tab...select a date range... Search button
- Select a Pt Name in the list and right click to go to appointment or select patient

#### **Top row of tabs**

# <u>Production Report tab- get a report of completed procedures, RVU's and amount charged to production</u>

Select Production Report tab...select detailed or summary...select date range...OK

#### CIP Procedures tab- a list of completed, in process and planned procedures entered by you only

• Select CIP Procedures tab...select date range---OK...also has production amounts

#### Patient Contact List tab- list of your assigned patients with phone numbers

• Select Patient Contact List tab...may be more than one page...select arrows next to 1 at top of report to see more pages

# **Finding Forms**

Forms can be accessed in two places in axiUm: the Forms tab and the Attachments tab. This document serves to distinguish where users can find forms rather than how to complete them.

# **Forms Tab**

- Open 🔐 EHR •
- Click on Forms tab •
- Click on the Kereate a New Record or Add Patient Form button on top toolbar.
- Select a form from the dropdown list.

Some forms, like Medical History, will not be available in the dropdown list once data is added to the form. Rather, the form will display in the Forms on File window. Click on the form there and

In Progress Tx Hi	story Tx Plan Forms Attachments	Perio	Labs	Prescriptions		Click here to open for	m list 📩 📥
Form #	Description	User				Date	
		Image: Section of the sectio		Add Form Form Form Date Description	BIOPSY BIOPSY COMDEN ENDO EXAM MEDHIS OROFAC ORTHO PEDO PEDO PERSON REFER TMD TPB X-RAY	Biopsy Form     Complete Denture Examination     Endodonic Forms     TMD/0.colusion     Medical History     TMD/0.rofacial Perio     Orthodontic Form     Perional Information     Referral Request     Occlusal Exam/TMD Forms     TPB Exemption     Radiogy	Doubleclick on desired form

In Progress Tx History Tx Plan Forms Attachments	Perio Labs Prescriptions			▲
Change Date 06/29/2009	Last Appr. Shrout, Mich.	ael Approve	Forms on File	6
Medical History Head And Neck Exam Dental Exam			Biopsy Form     11/12/2009	
Form Question	Answer	Date	Medical History	×
Any changes since last visit? Note changes in appropriate area of this form.		<b>_</b>	Radiology 11/12/2009	3
MEDICAL SUMMARY/MODIFICATIONS			- TMD/Occlusion	
Medical History Summary	60 vn wm. with a hx of hv-nass surnerv	06/24/2009		

modify. Changes will be saved with a new date.

In

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# **Attachments Tab**

- Open EHR and click on Attachments tab (or click on the Attachments button on the left)
- Default is Consent Forms •
- Click on 🖾 the Create a New • Record button
- Click on ... the elipses button •
- Doubleclick on the desired form
- Click OK and then complete the fo

You can download PDF copies of the fe by setting your computer's default pri PDF and then printing out the forms.

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		Patient Consent				OK 1
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#### **Axium Cheat Sheet for Opening Referral/Consult Forms**

In the EHR module, go to Forms tab

Forms

Hit the **Add Patient form** button on upper right toolbar Select the appropriate form form the drop down list:

PG Endo- ENDX -CONSULT ENDO, DX & REFERRAL GPR- REFERRAL GPR Oral Pathology – PATH -CONSULT ORAL PATHOLOGY Oral Surgery- SURGRE -REFERRAL ORAL SURGERY PG Ortho- CNS- CONSULT ORTHO PG Perio- PEREF- REFERRAL PG PERIO PG Pros- PRREF- REFERRAL PG PROS or Create New Record

khanse@lsuhsc.edu

#### Suspending Forms in axiUm

Forms can be suspended if they cannot be approved or completed for various reasons. Suspending the form removes it from the unapproved items list in Personal Planner The form can be re-opened at a later date without losing the information.

#### Hit the Suspend button (pause button on side toolbar)- enter a Reason and have faculty approve.

		- 1	
		_	
1		-	
	-		
-	-		
	-		
_	-		

To reopen the form at a later date if needed, just hit the Play button and have faculty approve.



#### Charting Findings (Existing Conditions and Restorations) in axiUm

Open the patient's chart in the Rolodex



# Open the EHR (Electronic Health Record)

#### 1. Chart Missing Teeth & Primary Teeth

In odontogram (tooth chart in top half of EHR window), click to select tooth number box or several teeth, right click and select **Missing**. **Right click- Select Teeth** -to choose **All Teeth** or **Maxillary** or **Mandibular Arch- Missing**. M now appears in missing tooth space.

Right click option Age Change changes tooth to primary tooth letter.

## 2. Add Findings Via Chart Add Tab

Click on [1] (top right of window) to open Chart Add tab.

In Chart Add tab, click on 📀 Findings

• Add Existing Restorations -

Select Existing Restorations Category to add existing restorations, sealants, temporary materials.

Use First tab- Quick List- (go to Full list if not found here)

Select restoration material (amalgam, composite, etc.)

Select tooth surfaces in odontogram-

Hit Add Finding button

Text should appear in window under **Add Findings** button at right in blue text (students need approval) E in status column =existing restoration

Sts	Code	Site	Surface	Phase	Description
Е	M-AMAL	21	DO	0	Amalgam

## • Add Existing Conditions –

Select **Existing Conditions Category** to add tooth conditions (Tipped teeth, diastema, impacted, etc.) Use First tab- **Quick List**- (go to Full list if not found here)

Select condition from list.

Select tooth numbers in odontogram-

# Hit Add Finding button

Text should appear in window under **Add Findings** button at right in blue text (students need approval) A in status column= existing condition

## Add Caries-

Select Caries Category to add caries found during clinical & radiographic exams.

Use First tab- Quick List- (go to Full list if not found here)

Select restoration material (amalgam, composite, etc.)

Select tooth surfaces in odontogram-

## hit Add Finding button

Text should appear in window under Add Findings button at right in blue text (students need approval) A in status column= existing caries

To **delete a finding**, highlight the text, select button with red X.

When finished, have faculty approve- text will display as pink once approved. 05/2018

#### Planning treatment in the Chart Add tab

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🔵 Find	ings			Qu	iick List	Full Lis	at Sear	ch							200	Jack \		4- seled	reatment		· · · ·
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- Time -		• • • • • •																			
Expert	j Diagn	P	rocedure		2									1							

If procedure is not already planned, it must be added in the Chart Add tab:

# Hit create new record button to open Chart Add tab

#### To Add treatment -

1) select category 2) select procedure from Quick List -3) select tooth site and surfaces (if applicable) in

odontogram- select **P** planned treatment button in toolbar Planned procedure will appear in blue text if it needs faculty approval- Yellow dots appear on tooth surfaces in odontogram

	P	200	Ļ I	<b>L</b> 11	<b>1</b> 6	
al at	Sts	Code	Site	Surface	Phase	Description
18	P	D2150	18	MO	1:0	Amalgam - 2 surfaces
1 10 1						

# **Completing and Approving Treatment**



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, Ima4 (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.

Patient A	pprovals										×
				Policies : 📀	Current	C Effect	ive on Trea	tment Date	:	🦳 Medical Clain	n
Practice	Training		-	Billing Order							1
D.II. 10				Subscriber #		Ins. Co.	Sch.	Asg.	Group	Cvg 🔶	
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Facility	-	-								+	
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Charted											
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Claim											
Trx.#	Date	Provider #	Cod	le Site	Surf.	Descr	iption		Patient	Insurance	Total S
						10					
			_								

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.

#### Adding General Clinical Notes in axiUm

1. In the EHR module- Tx History tab



2. Hit the **Add Note** button General note.

Code

To choose a specific note guide for a discipline, hit the ellipsis button next to Code

and double click on the note code or hit the down arrow button so that it appears in the bottom of the window.

<ul> <li>E UGEN</li> <li>E UGOD</li> <li>E UGPE</li> <li>国 UGREMPR</li> </ul>	Undergraduate Endodontics APPOINTED FOR: CHIEF COMPLAINT: MED HX REVIEW:SYSTEMIC ILLNESSE Undergraduate Oral diagnosis- Comprehensive Exam CHIEF COMPLAINT: BP: PULSE: ALLER Undergraduate Periodontics APPOINTED FOR: choose one comprehensive perio examsc/rp1 moni Undergraduate Removable Prosthodontics APPOINTED FOR: CHIEF COMPLAINT: MED HX REVIEW: SYSTE
■ UGNEST	Undergraduate Restorative APPOINTED FOR: CHIEF COMPLAINT: MED HX REVIEW: SYSTEMIC ILLNESSE
Selected Comments:	
UGREST	Undergraduate Restorative APPOINTED FOR: CHIEF COMPLAINT: MED HX REVIEW: SYSTEMIC ILLNESSE

The note guide (IN CAPS) will now appear and text can be added. Hit Add New to Save.

General Note - TRAINING, Patient 11							
Site     3     Select tooth site from drop down menu     User     Hansel, Kathryn       Date     02/07/2014     Seq#     0     Appr. User							
Undergraduate Restorative APPOINTED FOR: CHIEF COMPLAINT: MED HX BEVIEW: SYSTEMIC ILL NESSES, ALLEBGIES, MEDS (DBLIG, DOSAGE FBEQUENCY, FOB-)	Code						
ORAL CANCER EXAM FINDINGS: REASON FOR VISIT:(EX: MO CARIES #3 OR #3 CROWN AND REASON, I.E.SURVEYED, EXISITING LARGE REST. FTC 1	≣	UGREST					
REST, ETC.) TX: [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 Please swipe to ac note for a different							
Add New Modify Cancel							

Kathy Hansel	504.941.8139	Room 2305
05/2018		

AxiUm Cheat Sheet for A	dding Clinical N	Notes	Using Template Notes
• In the EHR mo	dule. Tx History	tab •	History
• Hit the Add Note but	con (to	op or bottom to	oolbar)
Select Note Type	×		
Select © General Note (a) Template Note (c) SOAP Note	OK Cancel		
		Select Templ	ate Note

- In next window, choose a specific note guide for a department, hit the ellipsis button next to Code
- Select the note template code. Add text in areas where asterisks appear. Hit OK to save.

Template N	ote -								
Code	PGENCON	POSTGRAD END	O CONS HX NOTE		Please swipe to add a n	ote for a	different user		
Site		Phase		User					
Date	05/25/2015 💌	Seq# 0		Appr. User					
Prompt							Next		
Answer	1					*	Prev		
<b>↓</b>									
						Ŧ	Spell Check		
	POSTGRAD ENDO CONS HX 1. NAME OF & DOCUMENTATION OF COMMUNICATION WITH REFERRAL SOURCE: (*) 2. PATIENT APPOINTED FOR: {*} 3. CHIEF COMPLAINT: {*} 4. TOOTH #(S): {*} 5. MED HX REVIEW: {*} a. BLOOD PRESSURE: {*} b. Systemic lliness: {*}								
0 2 0	d. Meds (Drug. dos: 7. DENTAL HISTOF 8. CLINICAL EVALL a. WNL {*} b. Findings {*} 8. PULP & PERIAPI 9. PERIODONTAL ( WNL):	age, Frequency, for) RY: { * } JATION (HARD & SO CAL TESTS PERFOR CONDITION (GENEF	{*} FT TISSUE TO INCLU RMED: {*} RAL NARRATIVE & LIS	JDE CANCER SCRE	ENING): 3 MM OR TYPE PERIO				
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		(	ОК Са	ancel					

Kathy Hansel 504.941.8139 Room 2305 <u>khanse@lsuhsc.edu</u> 05/2015

#### Axium Cheat Sheet for Adding Contact Notes to a Patient's Chart

Open patient's chart in **Rolodex**.



Open Patient Card by clicking on patient's name in status bar at bottom of screen or chart icon



in the middle of **Rolodex** screen.

Chart Pt Type	IN Employee			🔓	contact ne	otes 🔍			
TRAINING.	, Patient 15		Dekiesh Coshe	-h Nishara				1	
06/06/199	4		Patient Conta	ct notes					
1234 Home							-	-	
12011101110				the local			I Show	Deleted	
Gentilly, LA				K					
70122			Contact Note	H 0 1000				<	
			Date 06/	13/2012	Time U3:08 PM	User	Hansel, K	Kathryn	
Insurance	MI								
Employer			Code	1					
			0000						
Subscriber	# 121121	121212	Note I				_		1
Subscriber Group	# 121121 111111	121212 11	Note	enter no	te here and then add i	o chart by	1		-
Subscriber Group	# 121121 111111 TRAIN	121212 11 ING Patient 15	Note	enter not	te here and then add t	o chart by	1		2
Subscriber Group Holder	# 121121 111111 TRAIN Medica	121212 11 ING, Patient 15 sid Soueroge (Adult)	Note	enter not hitting	te here and then add t add record (green plu	o chart by s button)	]		
Subscriber Group Holder Coverage	# 121121 111111 TRAIN Medica	121212 11 ING, Patient 15 aid Coverage (Adult)	Note	enter not hitting	te here and then add t add record (green plu	o chart by s button)	]		2
Subscriber Group Holder Coverage Alert	# 121121 111111 TRAIN Medica	121212 11 ING, Patient 15 aid Coverage (Adult)	Note	enter not hitting	te here and then add t add record (green plu	o chart by is button)	]	llogr	2
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Subscriber Group Holder Coverage Alert Office Custom	# 12112 111111 TRAIN Medica	121212 I11 ING, Patient 15 iid Coverage (Adult)	Date           09/29/2010	enter not hitting	te here and then add t add record (green plu Note wrong phone number	to chart by is button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom	# 121121 111111 TRAIN Medica	121212 I1 ING, Patient 15 iid Coverage (Adult)	Date           09/29/2010	enter no hitting	te here and then add t add record (green plu Note wrong phone number	to chart by us button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom	# 121121 111111 TRAIN Medica	121212 II ING, Patient 15 aid Coverage (Adult)	Date           09/23/2010	enter not hitting	te here and then add t add record (green plu Note wrong phone number	to chart by is button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom	# 121121 111111 TRAIN Medica	121212 11 ING, Patient 15 aid Coverage (Adult)	Note	enter not hitting	te here and then add t add record (green plu Note wrong phone number	to chart by is button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom Type Active Active	# 121121 111111 TRAIN Medica Date 04/02/08 04/11/08	121212 11 ING, Patient 15 aid Coverage (Adult)	Date           09/29/2010	enter not hitting	te here and then add t add record (green plu Note wrong phone number	to chart by is button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom Type Active Active Deleterd	# 121121 111111 TRAIN Medica Date 04/02/08 04/11/08 05/30/08	121212 11 ING, Patient 15 iid Coverage (Adult) Time 1:00p - 4:00p 9:00a - 12:00p 1:00n - 4:00n	Date           09/29/2010	enter not hitting	te here and then add t add record (green plu Note wrong phone number	to chart by is button)	]	User Gordy,	Spencer
Subscriber Group Holder Coverage Alert Office Custom Custom Custom Custom Custom Active Active Active Deleted Deleted	# 121121 111111 TRAIN Medica Date 04/02/08 04/11/08 05/30/08 07/21/09	121212 11 ING, Patient 15 aid Coverage (Adult) Time 1:00p - 4:00p 9:00a - 12:00p 1:00p - 4:00p 8:30a - 11:30a	Date           09/29/2010	enter nol hitting	te here and then add t add record (green plu	to chart by is button)	]	User Gordy,	Spencer

Click on **contact notes icon**. Type in notes in **Note** window.

Click on Add a New Record icon to add contact note.

Kathy Hansel Axium Support 504.941.8139 Room 2305

# **Printing a Treatment Estimate**

For a Tx Estimate, treatment must be planned and approved (not put in process or completed) to display in the *Tx Estimates* window.

- Click on the Tx History tab. Make sure all of the Tx you are going to include in the contract is Planned (not In process or Completed) and all is approved (look for red Ps).
- 2. Click on the [];;;; (Estimate) button.
- 3. Select all the lines of treatment that need to be included in the estimate. Click OK.

Select Planned Treatments Date Seq# Code Site Surf. Description Patient Ins. ок Cancel Select All Deselect All Sort by O Date Phase/Seq 440.00 0.00 Total

Estimate	24	an (m	×
V Print Practice Name	File	estimate.rpt	▼ Print
Dr. G1001	Copies	1	Close
Title			-
- Comment 1			
Comment			
Comment2			
Estimated Values			
Based on <ul> <li>Store</li> </ul>	ed Values	Estimated fees on date	
Consolidate Labs on I	Estimate	Signatures	nstructor 🔽 Patient

- This opens the *Estimate* window where you can enter your provider code and a title. You only need the patient to sign.
- 5. Click Print to open a copy of the contract on the screen.
- Click the Print button from the top of the page.
- axiUm will prompt for the patient's signature and print a copy of the estimate with the patient's signature.

#### Tx Plans Cheat Sheet

To create a new treatment plan, select Add New Record

- 1- Enter Tx Plan Description- e.g., Phase 1 or Phase 2
- 2- Enter Chief Concerns in patient's own words
- 3- Problems select New item Problems field search problems with ellipsis button

Hit (green checkmark) to Save 📓 X closes the
box (To delete- select item and right click )
4-Diagnoses- click on New Item – Diagnosis field- 🛄 ellipsis button to select from list
Hit (green checkmark) to Save, 🚨 X closes the box
(To delete- select item and right click )
5- Tx Option 1 –New item
Select <b>Diagnosis</b> from drop down list
Select <b>Procedure</b> from <b>Quick List</b> , Select <b>Tooth Site/Surfaces</b> in odontogram

×

Hit (green checkmark) to Save 🚨

6-Faculty Approval- Approve Option- text is green when approved

**7- Pt Accept/Print**- patient signs treatment plan- after signing, planned treatments will appear at the bottom of the **Tx History** tab



Close treatment plan window to return to first screen

**Note:** Only **one** option can be approved. Planned treatments in the New Option tab can be used for reference (Phase 2 plannng) or to document presenting other treatment options to the patient.

....

# Notes for Treatment Planning:

\*\*Add Findings first in Chart Add tab- existing restorations, tooth conditions, caries;

missing teeth indicated in odontogram.

Tx Plan Description:

**Chief Concerns:** 

**Problems:** 

Diagnoses:

# **Planned Treatments:**

Findings/ Treatment	<b>Findings</b> /	Treatment 💽
1	17	
2	18	
3	19	
4	20	
5	21	
6	22	
7	23	
8	24	
9	25	
10	26	
11	27	
12	28	
13	29	
14	30	
15	31	
16	32	

#### Adding and Signing a Consent Form

Open the patient's chart in the Rolodex

1-Go to Patient Attachments Module



2-Click on Add new record button- green plus sign

3- cClick on **ellipsis button** to find the consent in list- double click on consent so that code appears in box GENCN2 (this is the general consent form that everyone signs, there are many others for other procedures)

	🏜 Patient Attachments	- TRAINING, Patient 24	(8288)		
20			Relea	ise of patient information consent or	n file
1					
	Section 2-Add 1	new record Ints (6)	Scanned consents		
	Images Forms (1)	U Data	Consent Code Description	Eilo Tuo	Expiry
5	Letters (1)	Add Patient Consent		<u></u>	
ЧY –	Business Office Consent Forms (6)	Patient Consent	3-Click to select		
#	Phase 2 Auth Form	Date 01/18/2013		/	
1000	1-Attachments	Consent	Expiry	•	Cancel
Re	Patient Notes	Section Consent For	ms 🔽 Sub-tab	Consents 💌	

4-Hit OK button in Add Patient Consent window

5-If Enter Parameter Values window appears, SELECT EACH FIELD AND ENTER ANSWER IN

DISCRETE VALUE before hitting **OK** button.

(Image of consent appears so that patient could view it- patient should have been given a copy on

a clipboard to read before signing)

6-Close window with red X at top right of window

7-Patient Signature window appears- have patient sign and hit OK

8-Witness signature window appears- type your name and sign

(Some consents have an additional window for doctor's name and signature)

#### axiUm Treatment Entry for Perio Module-Step by Step

Open patient chart in Rolodex-

1. Open the Perio Charting

recent exam displayed.

module you will see the most

2. Hit the create new record button Resume entry window appears.

To enter a completely new chart select 'No', to resume an old chart click 'Yes'. 3. Select Perio Date window appears. New: To open the Add Perio window without resuming any of the items in the list.

**Resume**: To allow users to select an incomplete chart and resume it. This is only enabled if the selected chart is incomplete. This will display the Perio Add window with data filled in from the chart selected.

**Edit/Review**: To allow users to select an incomplete chart, review it and possibly make corrections. When selected, displays the Perio Add window for the selected date with the title Edit Perio, the Chart Date enabled and the data filled in like when in Resume mode.

**Close Off** : This closes off an incomplete chart so that they can no longer be edited. **Re-Open**: Undoes the closing off of a chart and allows it to be edited. Both Close Off and Re-Open will add another line in the list with today's date in the Audit Date column.

Note :The difference between Edit and Resume is that Edit keeps the perio date as of the date it was first entered. Resume updates the perio date to today.

4. Choose Exam type from the drop down

(Initial exam, complete exam. Post-scaling, etc.)

5. Enter the values for each category by using the keyboard or selecting the values on the display screen, some will forward automatically, some values require choosing a site first. Defaults to beginning with Max right-max left-mand left-mand right



**Clear All**: To clear all entries since you last saved.

**Clear:** Clears the current cell (but does not auto advance so that the user may re-enter the proper value).

**Clr Tooth**: To clear all 3 values for the tooth. For Yes/No conditions, resets them to their "No" value.

Incomplete To save and close a chart that you wish to resume at a later date

#### Complete

To save a completed chart,does **NOT** allow re-entry at a later date to resume the exam **Toolbar buttons:** 

View form history, view a list of forms and see which ones are complete or incomplete, can reenter incomplete exams

full mouth view of perio screen

can choose to compare selected exams graphically or text only



opens the medical history

view attachments (referral letter, medical release letters)



print exam

select perio display options

Kathy Hansel 504-941-8139/Room 2305

# To View Treatment on A Specific Tooth or Teeth (revised 4/27/07)

										PD(F)	
s	Tx History	Tx Plar	n For	ms A	ttachm	ents	Perio	Labs Pres	criptions		
	Prov./User	Code	Site	Surf.	Stat	Phase	Location	Discipline	Appr. User	Description	
	T. Student	D2752D	13		Р	0		REST	M. Myers	Shade Selection	
	T. Student	D2752E	12		Р	2		REST	M. Myers	Jaw Relation Record*	
	T. Student	D2752E	13		Р	0		REST	M. Myers	Jaw Relation Record*	
	T. Student	D2752F	12		Р	2		REST	M. Myers	Cementation	
	T 01 1 1	D OBEOE	40			0		DEGT		0	V 92

- 1. Select Patient
- 2. Open EHR Tx History tab
- 3. Click on the ellipses button next to the Site data field
- 4. Click on *Deselect* all
- 5. Check the teeth number you want displayed
- 6. Click OK
- 7. Only selected teeth will display

ï		-1					
I	Date	Prov./User	Code	Site	Surf.	Stat	Phase
I	03/21/07	T. Student	D2752	13	MODBL	Ρ	0
I	03/21/07	T. Student	D2752A	13		Р	3:3
I	03/21/07	T. Student	D2752B	13		Р	0
	03/21/07	T. Student	D2752C	13		Р	0
	03/21/07	T. Student	D2752D	13		Р	0
I	03/21/07	T. Student	D2752E	13		Р	0
I	03/21/07	T. Student	D2752F	13		Р	0

Exit EHR and return to restore default for displaying all treatment.

# To View Treatment for a Specific Time Range

- 1. Select Patient
- 2. Open EHR Tx History tab
- 3. Click on the ellipses button next to the Date data field
- 4. Check the fields you need to change
- 5. Change to the desired dates
- 6. Click OK
- 7. Only treatment for desired date range will display

Exit EHR and return to restore default for displaying all treatment.







#### Filter treatment records in Tx History by tooth number in the odontogram

Select tooth # box in odontogram (turns blue when selected) - right click Select the Show Tx History option



Axium filters the list view to display only those records (e.g. treatments, conditions, notes, etc.) for the selected tooth (see below).

**To return to the original list view**, go to the odontogram, deselect the tooth, and select the show Tx History right-click option again.

In Progress	Tx History	Forms	Attachm	ents I	Perio	Tx Plar	ns M	1edications	Chart.	dd		<b>_</b>	•	
Date	Prov./User	Code	Site	Surf.	Stat	Phase	Disciplin	ne App	r. User	Description	Site	22		
05/13/14		D2752	22	MIDFL	P	2:0	FPROS	K. H	ansel	Crown - PFM noble metal (In house )	-	<u> </u>	•••	
											From		m	
											To	05/13/2014		
<u> </u>											Vie	ws		
											Sta	tion View		
											stud	dent		
											Pla	nned/In Process		
											LOF Sta	hpleted I rtmts	00	
											Not	es ONLY	ss	
													X	
•										· •				(
_														

#### Adding Supernumerary Teeth to the Chart in axiUm

• If a supernumerary tooth has been treated, indicate the tooth site as follows:

Primary: add 'S' character behind the letter of the nearest adjacent tooth designation (e.g., an extra tooth next to C would be CS).

Permanent: add 50+ the nearest adjacent tooth number (e.g., an extra tooth next to 28 would become 78).

- To chart/add a supernumerary tooth as a **Finding** during an initial exam
- opens Chart Add tab- select Findings radio button

Procedure subtab- Existing Conditions Category-

Select C4016 Supernumerary tooth as a condition

Indicate the tooth site by adding 50 + nearest tooth #



Select Add Finding button



# Messenger

axiUm Messenger is used primarily for patient purposes.

If you have unread mail, the Messenger box at the bottom of the window will display an envelope with a blue or red

(high priority) background

If you have no mail or have read your mail, the box will display an envelope with a white background.

#### To Check Mail

- Click on the envelope button.
- Read any messages that have subject lines other than New Patient Assigned or Patient Overdue.
- Messages are sent whenever a medical release letter or biopsy report is scanned into one of your patients' records or when you have Unapproved treatment in a patient's chart.

	Messenger			
	<b></b>	. 🕞 😘 🛠		
,			Mes	sages Displayed for Previous 16 Week(s)
	Messages	! From		Subject



- To Send a New Message 📑
- Click on the new message button- green plus sign
- Type last name of recipient in the To field- add a subject line and click in the text box to enter the text of your message- **Send**.

**Options** button allows you to see messages > 4weeks old and other settings.

#### **To Delete Messages**



- Highlight all the messages you want to delete. You can select the first message, hold down the shift key, and select the last message to select a number of contiguous messages. You can select the ctrl key to select noncontiguous messages.
- Click the red X to delete. Most (all) Messenger messages can be deleted without consequence.

#### **To view New Patient Assignments**

Click on the Personal Planner button.



Click on Assigned Patient s tab. Click on Search button.

Revised 05/18

# Axium Cheat Sheet for Exit Exams

When treatment is complete for a patient in the Undergraduate Student Clinic, an Exit Exam is done to verify that all dental treatment is in good condition. The patient is then released to private practice for regular dental maintenance.

Open the patient's chart in the **Rolodex**- Go to **EHR** module On the right toolbar at the top half of the screen,

hit the "Add Patient Form" button
1) Select from the drop down menuEXIT- Exit Exam Form

2) Answer every question on the form that applies. It's okay to leave questions unanswered if they don't apply for the patient, e.g. a denture patient with no operative treatment.

 Select the appropriate code in the Chart Add tab-0092 Exit exam passed OR
 0093 Exit exam failed

0092 Exit exam passed (all questions answered Yes):

- Give the patient an Exit Letter- located at the front of clinic with other forms.
- Complete the Patient Satisfaction Survey with the patient-

Go to **Tools** on the axiUm toolbar at the top of the screen- select **Survey**-Survey window opens (**PS2**) - click on the answer box for Yes answers Go to the next line for No answer to appear.

Hit **Close** when finished.

Most students ask the patient the questions and enter the answers in the survey for the patient.

**0093 Exit exam failed** (some treatment was not in satisfactory condition):

• the patient should be scheduled for the appropriate treatment and another Exit Exam will be done when the problems have been resolved.

#### Scanning photographs into a patient's chart in axiUm

First, save the photo that you want to attach on your desktop.

1	Patient Attachments - Training, B	ob (29708)					
		22	✓ Release of	patient information c	onsent on file	E S	Show Deleted
III -	Section	Radiographs	Photos				
	Business Office (90) Consents/Tmt Plans (113)	Date	Description	File Type	Status User	Approved By	Approval Date
2	Forms (120) Historical Records	Add Patient At	tachment				×
<b>III</b>	HOP Clinic (1)	Patient Attac	hment			-7	
00000	Immunizations	Date	02/28/2018	User H	lansel, Kathryn		
2	IPE Clinic	Description				Lan	cei
17	Letters (51) Medicaid Forms	Attachment				Scan to	File
2.8	Medical InfoConsults (2)	Castian		S	Photon	- Select 9	Source
()	NOMC Referral Form	Section	IIIayes	SUD-tab (	THOLOS		
	Patient Notes					Scan D	hirect

- 1- Open the patient's chart in the **Rolodex** (last name, first name enter), select patient- name must appear in status bar at the bottom of the axiUm screen
- 2- Open the Attachments module
- 3- Go to Images in Section column
- 4- Go to the **Photos** tab
- 5- Hit the **Create new Record** button (green plus sign)to open the **Add Patient Attachment** window
- 6- Hit the **browse** button- ellipsis button with 3 dots- find the photo that you have already saved on your desktop- select it to attach
- 7- Add a description in the **Description** field and hit the **OK** button
- 8- You should see the name of the file listed now and you can double click on the file name to open and view it.

\*\*\*Remove the saved file from the desktop when finished.

# Viewing Photos/Radiographs in Patient's Chart in axiUm

- 1- Open the patient's chart in the **Rolodex** (last name, first name enter), select patientname must appear in status bar at the bottom of the axiUm screen
- 2- Open the Attachments module
- 3- Select Images in Section column
- 4- Select Photos or Radiographs tab
- 5- Double click on the name of the file in the **Description** column to open and view the radiograph or photo

👔 axiUm - LSU Schoo	ol of Dentistry							
Actions Tools Lin	ks Patient Window Help							
1 ×	Patient Attachments - Training, Pa	tient 05 (45333)						
	<b></b>	55		Release of patier	nt information co	onsent on file		
				4				
222 <b>0</b>	Section	Radiographs (1)	Photos (1)	-				
	Business Office (7)	Date	Description		File Type	Status	User	Ī
	Consents/Trmt Plans (10)	05/18/2018	Photo from I	Pathology consult	ipg	Attachment	Hansel, Kat	
<b>N</b>	Forms (5)			C				Т
	Historical Records							
	HOP Clinic							
111	Images (2)							
00000	Immunizations							
0	Insurance							
2	Letters (4)							
	Medicaid Forms							
<u>~</u> 7	Medical InfoConsults (1)							

# **Undergraduate Medical Hold Process**

No appointments are to be made for a patient until this medical hold process is completed: The MCR has been returned, reviewed, approved for undergraduate clinic students, scanned into axiUm, and the chart unlocked.

1. Medical hold forms (Medical Consultation Requests or MCR) are available to students *in the Forms tab of the EHR module in the* 

*patient's chart in* axiUm. or opens the Forms window-select MCR form.

- 2. The electronic form is completed (all pink lines are required). Hit the Calculate button at the bottom of the form to add the patient's information to the form.
- 3. Faculty approves the form.
- 4. **Patient signs** the form at the front desk.
- 5. Form is printed and given to the patient. There are 2 pages; the second page is the Physician's Response.
- 6. Chart is locked by the HATs.
- 7. **The Physician's Response** is faxed to the school or brought back to the school by the patient.
- 8. The student receives an Axium message from Akili. The student must arrange to meet with the faculty member who requested the medical consult to review and sign the Physician's Response. This can be done during clinic sessions. The MCR will not be released to the student until an appointment has been made with the faculty member to review it. Do not appoint the patient on the same day that the MCR is reviewed with faculty because additional information may be required or faculty may not be present that day.
- 9. Akili Johnson scans the approved and signed Physician's Response page of the MCR into the patient's axiUm chart in the Physician's Response tab of the MCR form and triggers an internal axiUm email to the student providers that the chart is unlocked. Paper copies of the MCR may now be destroyed or stored.
- 10.<u>Students review the MCR with supervising clinical faculty and</u> <u>comply with its recommendations before treatment.</u>



#### Instructions

This is a click by click walkthrough in axiUm:

- Searching for a patient Α.
- В. Scheduling book
- C. Adding an appointment
- Patient's chart must be open for the following tasks:
- Attachments (Referral letters, Med Hx) D.
- E. | Adding/Finding forms
- **F**. . **Adding Clinical Notes**
- G. Adding Findings (caries, existing rest)
- Adding New Planned/completed treatments Н.
- ι. **Completing/charging out planned treatments**
- Л. Signing consents

## A. Searching for a Patient

- On the Desktop Click to open Rolodex 1)
- In the Search Area type search criteria, last name, first or chart # (Enter) 2)

Note: If Practice at top of screen is not correct, go to Tools on toolbar- Set axiUm Defaults & select from drop down menu

- 3) Results are displayed in the Search Results List
- 4) Select name to open chart, name appears in bottom status bar.
- 5) Patient's chart can also be opened in the Scheduler module by right clicking on the appointment- Select Patient- patient's name appears in the bottom status bar when chart is opened
- Chart is locked, click on lock 6)

to find out why (balance, general consent not signed, medical hold)

7) Pt needs to sign consent form for specific treatment (endo, ext's)

# B. Checking the Scheduling Book for Openings

- On the Desktop, Click to open Scheduler 1)
- On the toolbar, Click on the Book icon 2)
- From the list Click to select the correct Appt. Book 3)
- 4) The Active tab displays all providers in the book
  - a. The text colors in the Appt window:
    - i. Green=Active appt
    - ii. Blue= pt confirmed (automated system)
    - iii. Red= pt has arrived
    - iv. Hover over the appointment block to activate the pop up which displays more information.

## C. Adding an Appointment

- On the Desktop, Click to open Scheduler 1)
- 2) On the toolbar. Click on the Book icon
- From the list Click to select the correct book 3)
- 4) The Clinic Book displays
- 5) Use the date bar to move the date as required
- 6) On a tan area (open) at the time the appointment is required
- 7) The Patient Rolodex displays
- In the Search Area type search criteria, examples are: 8)
  - LastName (Enter) a.
  - , (comma)FirstName (Enter) b.
  - Name, (comma)First (Enter) C.
- LSU SCHOOL OF DENTISTRY

- 9) Results are displayed in the Search Results List
- 10) Double Click to select the patient
- 11) The New Appointment screen displays
- 12) Add the Appointment Code from the drop down
- 13) Hit the Tx Plan button to select planed treatments for appt Tx. Plan..
- 14) Click the Accept button Accept
- 15) The appointment block displays in the column/date selected
- 16) When hovering over an appointment, Right click in order to:
  - Edit the Date/Time/Clinic in the New Appointment screen a.
  - b. Reschedule - Yellow floaty displays, have to change the date, click and drag to reposition and double click to seat the floaty
  - c. Fail
  - d. Cancel
  - e. Delete

# D. Attachments (Consents, Scanned documents)

- With Patient's chart open, go to the EHR module 1)
- 2) Attachments Tab—Section- select Consents/Trmt Plans to view signed consents & Treatment Plans. Images section- scanned radiographs, photos Letters section- Referral letters Attachments icon also opens Attachments window

#### Adding/Finding Forms (Medical Hx, Consults) Ε.

- With Patient's chart open, go to the EHR module 1)
- Forms tab- Click on + sign next to form in Forms on file to 2) expand and then click on date ot open an existing form
- 3) To add a new form-

Only one Medical History is opened & updated Select from drop down list to add consults & other forms

#### **Adding Clinical Notes** F.

- With Patient's chart open, go to the EHR module 1)
- In the Tx History tab, select Add a new Note icon 2)
- Select General Note -then ellipsis button next to Code to find note 3) Code
- template double click on note guide in list. 4)
- UGOD, UGORTHO, UGPE, UGREMPR, UGREST are note guides 5) for appropriate disciplines in Undergrad Clinic.

# G. Adding Findings (caries, existing rest)

- With Patient's chart open, go to the EHR module 1)
- Odontogram- right click to indicate missing teeth, Age Change to 2) indicate primary teeth
- 3) Click on Add Record to open Chart Add tab
- 4) Findings include existing restorations, conditions and caries found at the initial or subsequent visits.
- 5) Add findings is not used to enter treatments (see H).







- Findings radio button -select condition, material code + select surface/tooth in odontogram.
- 7) Hit the Add Finding button to add each of the findings to the chart.

## H. Adding Planned Treatments

1) With Patient's chart open, go to the EHR module



3) Dental Txs radio button OPental Txs

5)

4) Select procedure code + select tooth/surfaces in odontogram



- Hit the P, I or C button a. P = Planned treatment
  - b. I = In process treatment
  - c. C= completed treatment

# I. Completing (charging out) treatments

- 1) With Patient's chart open, go to the EHR module
- 2) Select Planned treatment (status P, red text) from list of planned

treatments at bottom of Tx History tab

- 3) Right click on selected planned treatments and select **Complete** treatments.
- Completing the treatment changes the status in the status column to C, the text turns to black and the fee is added for the treatment.
- 5) The fee can be viewed in the Transactions module so that the cashier can collect payment.

#### J. Signing consents

1) With Patient's chart open go to the EHR module



- 2) Attachments module-
- 3) Add new record button- green plus sign
- 4) Click on ellipsis button to find the consent in list-double click on it.
- 5) Hit OK button in Add Patient Consent window
- 6) Close window with red X at top right of window
- 7) Patient Signature window appears- have patient sign and hit OK
- 8) Witness signature window appears- enter your name and sign (Some consents have an additional window for doctor's name & sig) You should now see the name of the consent with today's date . Double click on it to view the signed consent.

- Workflow
- 1) Open the Scheduler module to view today's schedule
- 2) Open the patient's chart from the Scheduler
- 3) Open the EHR
- 4) Review medical history in Forms, referral letter in Attachments
- 5) Open a clinical note
- 6) Have patient sign consents as needed
- 7) Add findings, planned or completed treatments.
- 8) Complete the clinic note and treatments for the session
- 9) Accompany patient to the cashier window to make payment and schedule next appointment

For **axiUm assistance**: Kathy Hansel 504.941.8139 Room 2305 <u>khanse@lsuhsc.edu</u>

Billing questions: Angela Jones 941.8138

Medicaid questions: Jeff Schluter 941.8183



# FACULTY START CHECK

(Student must have an appointment entered for the patient in the Scheduler module.) In lower left corner of axiUm screen:

J. Student	D200000	
1 in		

• Click on red student name button

**Appointment Start-Check** window opens. **Planned treatments** for this patient are on the left, **Appointed Treatments** for today's visit are on the right.

Faculty can move a treatment from one side to the other with the arrow keys if they want to change the appointed treatments for that visit.

- Hit Approve button at bottom of Start Check window
- Enter approval code in User Authentication window

Student name button turns green once approved by faculty. J. Student

	eres										Appointed Treat	ments						
Yov.	Phase	Code	Ste	Surface	Status	Description	Appt Date	Pre-Auth#	_	1.17	Prov.	Phase	Code	Ste	Surface	Status	Description	Time
D200000	:0	D6010	3		1	Surg placeme					D200000	1.0	D2160	6	MIF	P	Amalgam - 3	
D200000	1:0	D2160	6	MIF	P	Amalgam - 3 s					D200000	1:0	D2331	7	ML	P	Resin-based	
D200000	1:0	D2140	31	м	P	Amalgam - 1 s				1000								
D200000	1:0	D2140	31	M	Ρ	Amalgam - 1 s				_								
D200000	1:0	D2140	30	D	P	Amalgam - 1 s				٢.								
D200000	1:0	D2140	29	0	P	Amalgam - 1 s			E									
D200000	1:0	D2331	8	DI	P	Resin-based c												
D200000	1:0	D2160	6	MIF	P	Amalgam - 3 s												
D200000	1:0	D2140	30	D	P	Amalgam - 1 s												
D200000	1:0	D2140	29	0	P	Amalgam - 1 s												
D200000	1:0	D2160	6	MIF	P	Amalgam - 3 s			1									
D200000	1:0	D2140	31	M	P	Amalgam - 1 s												
D200000	1:0	D2140	30	D	P	Amaigam - 1 s												
D200000	1:0	D2140	29	0	P	Amalgam - 1 s												
D200000	1:0	D2160	6	MIF	P	Amalgam - 3 s												

**Red** provider name indicates that a start check is required and is awaiting approval. **Green** indicates that a start check has been approved.

**Yellow** indicates that a start check is required for an upcoming appointment that requires approval.

# A symbol appears next to procedures approved in the Start Check in the Tx History tab in the EHR.

08/27/14 J. Student D233	1 7	ML	Р	1:0	REST	Resin-based comp-2 surf, ant.
--------------------------	-----	----	---	-----	------	-------------------------------

**Start Check**- (patient must have appointment in Scheduler)

- J. Student 1) click on **red student name button** at lower left of screen
- 2) review Appointed Treatments on right side of window
- 3) Appointed Treatments can be added /changed by using arrow keys in the middle of the window
- 4) enter approval code- (semicolon; 4 character code- Enter)
- 5) student name button turns green

#### At the end of the session – change the status of treatment from planned to in process or complete:

6) Go to Tx History tab - Select planned procedure- right click- select In Process Tx Visit or **Complete Treatments** 

Text will turn blue to indicate that it needs approval

If it is already in process (I status)- double click to update treatment date or select- right click and select Complete Treatment if completed that day.

#### **\*\*\*\***To approve treatment, treatment notes, forms or perio charts:

- 21497 7) Approve by hitting aqua chart number button
- 8) Review procedures to be approved
- 9) A Treatment Note must be added for every patient visit before student leaves clinic, the note will display for approval
- 10) enter approval code (; semicolon before and enter button after 4 character code)

11) Is medical history signed? If button appears at bottom of med hx form, patient must sign at station with signing pad.

EPR forms or Perio Charts needing approval appear in a blue box at the bottom of the Approvals window.

- 12) Grades- Grading window displays- choose Discipline & Form from drop down box- enter grades
- 13) Enter approval code again (semicolon; 4 character code- Enter)

## How do you know if the approval code worked?

- Chart number button will turn grey and text of procedure turns black when successfully approved
- Faculty approval must be given at every appointment- a procedure (whether complete or in process) or treatment note must be entered in the chart for every patient visit and approved by faculty
- Charges are not entered until procedure status is changed to Complete and Approved. Approval must be completed **before** bringing the patient to the cashier.

#### Can a grade be added after a clinic session when the chart number button is no longer aqua and the procedure is complete? Yes

Go to Tx History tab- select and right click on procedure needing grade- select Add Student Evalenter approval code to open grade form- choose discipline and grade form if one has not been started- enter grades- enter approval code

>

# • To approve and grade treatment during a clinic session:

Alert Alert	Patient, Ima3 (F44)	3189	2	
1			· ' V	

On the Status bar, select the chart number box with an aqua blue background.

In the **Patient Approvals** window, planned or completed procedures are displayed. Click **Approve.** 

In the User Authentication window, enter faculty approval code.

From the **Discipline drop-down list**, choose the appropriate discipline.

From the Form drop-down list, choose the appropriate form.

In the Add/Edit Evaluation window, select a question ,select its corresponding Grade box, and enter a grade. Continue grading for all general questions and treatment-specific questions

Click OK.

In the User Authentication window, enter faculty approval code and click OK.

**Note:** In axiUm, the first approval indicates you have approve the student's completed treatment. The second approval represents your "signature" on the evaluation.

# • To Add or Edit a grade for treatment that was already approved:

Open patient's chart in Rolodex

Go to EHR

Tx History | tab-

## Right click on completed and approved procedure and select – Add Student Eval

In Progress	T x History	Forms	Attachm	ents P	erio	Tx Pla	n Medication	ns	
Date	Prov./User	Code	Site	Surf.	Stat	Phase	Appr. User	Descriptio	n
06/11/12	J. Student	D2140	2	0	С	0	K. Hansel	Amalga	.1 surface
									Add Tx Note
02/19/09		D0150			P	0	K. Hansel	Compre	Edit Tx Note
02/19/09		D0210			P	0	K. Hansel	Intraora	Add/Edit Tx Form
02/19/09	J. Student	D0330			P	0	K. Hansel	Panorai	Add Lab,
02/19/09	J. Student	D0330			P	0	K. Hansel	Panorai	Edit Lab Order
11/30/09	J. Student	D0150			P	0	K. Hansel	Compre	Complete Treatments
12/21/09	J. Student	D0150			P	0	J. Gallo	Compre	In Process Tx Visit
12/21/09	J. Student	D0274			P	0	J. Gallo	Bitewing	Assian Phase/Seq
01/12/10	J. Student	D0150			P	0	J. Gallo	Compre	Medical Information
01/12/10	J. Student	D0274			P	0	J. Gallo	Bitewing	Tx Consent History
01/12/10	J. Student	D2140	14	0	P	0	J. Gallo	Amalga	Print Labels
01/15/10	J. Student	D0150			P	0	D. Faculty	Compre	
01/15/10	J. Student	D0274			P	0	D. Faculty	Bitewing	Add Student Eval

Faculty must enter approval code to access grade form.

See *Evaluations Module* fo rmore information on tracking grades fro students.



#### **Evaluations Module in axiUm**

Evaluations											
Provider	D200000			Date From	05/18/20	017		Search A	dd	Edit	View
Instructor			X	Date To	05/18/20	018		Print Re	sume		
Discipline	ALL	•		Form				Special Assessment		Show Instructor	(Completed)
Туре	Evals,Comps		]	Grade				Show Deleted Items	He	eld For	X
Evaluations	Grades Perio	dic Evals	Unevaluat	ed Tx Unappr	oved Tx	)					
Provider	Date	Hours	Discipline	Instructor	Form	Comp	Chart	Patient	Held	Held For	GradeID
Student, Joe	09/22/2017	0.00	RPROS	Hansel, Kathryn	RP1		40595	Training, Pati			3031847
Student, Joe	09/22/2017	0.00		Hansel, Kathryn	RP1		40595	Training, Pati			3031848
Student, Joe	03/01/2018	0.00	FPROS	Hansel, Kathryn	FP		29708	Training, Bob			3101468
	00.04.0040	0.00		A 10 10			00700				0404400

Evaluations Module - Evaluations tab- allows the user to search for grade forms.

Date Range- select Date From and Date To

Search- hit Search button to find grade forms with selected criteria

The search can be filtered by:

**Discipline-** use drop down list

**Instructor** – use browse button next to field to find name of instructor

Form- select a specific form by using the browse button next to Form field

**Note:** If you cannot find a grade form when searching by the discipline or form, search by date only. The form may not have had a discipline selected at the time of grading.

#### Select a grade form in the list:

**Edit** allows faculty to edit a grade form (faculty approval code needed to edit a grade form) **View** allows the user to view a grade form

Grades Tab- allows the user to search for individual grades using the criteria listed above.

Unevaluated Tx Tab- allows the user to search for treatment that was not graded yet.

Unapproved Tx Tab- allows the user to search for unapproved treatments.

Tip: Click on a column heading to sort by that column name (Date, Form, etc.).

Kathy Hansel

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