axiUm- Faculty- Step-by-Step
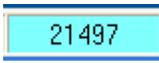
Start Check- (*patient must have appointment in Scheduler*)
1) click on **red student name button** `J. Student` at lower left of screen
2) review **Appointed Treatments** on right side of window

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 - S**elect 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:

7) **Approve** by hitting aqua chart number button `21497`
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 `Sig. Required` 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 Eval**- *enter approval code to open grade form- choose discipline and grade form if one has not been started- - enter grades- enter approval code*