AxiUm Training

Dental Students

Kathy Hansel
## AxiUm Training for Dental Students

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Remote Access to Axium:

Off Campus

2. Select Citrix Web Interface - Use LSU username and password
3. Select Applications tab when Citrix Online Plug-In window appears, you should see Axium icon-log on using axium logon and password
4. To access Schick (CDR Dicom), you will have to open remote desktop connection through citrix
5. Hit Start button – lower left corner of Citrix window
6. Select Remote Desktop Connection (computer name : lsusd-terminal)
7. Connect
8. Use LSU username and password
9. Hit Start button in this window to find CDR Dicom (Schick radiographs) program.

Axium is installed on clinic and library computers only.

On Campus

1. Select Remote Desktop Connection
2. Go to Start> All Programs>Accessories> Communications>Remote Desktop Connection
3. Computer name : lsusd-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.

Mac Users:

Go to LSU Health New Orleans School of Dentistry Home Page [http://www.lsud.lsuhsc.edu/](http://www.lsud.lsuhsc.edu/)
Learning Center- Online tutorials- Axium Videos & Document Tutorials

Kathy Hansel  Axium Administrator  Room 2305  khanse@lsuhsc.edu  504.941.8139  08/2015
Selecting a Patient Via the Rolodex

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.
4. Make sure that the patient’s name displays in the bottom name field.
5. 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.
6. 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.

Revised 06/12
Scheduling Patients

Go to Scheduler module

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

4. Double click on patient name -

5. Book from Left to Right (Reading order).

6. Select Appt code with drop down list and Tx Discipline will display (Tx discipline determines background color)

7. Click on Tx Plan and move procedure you plan to do at this appointment from Planned Treatments (left side) to Appointed Treatments (right side)- Close Tx Plan window

8. Cost of planned treatment will appear under Tx Plan Total.

9. Hit Accept in New Appointment window

Right click option on appointment window— 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 to open patient card.
Selecting a Patient via Personal Planner

1. In Personal Planner, click on Assigned Patients (or Appointments)
2. Click on the Search button
3. Select the patient
4. Right mouse click on the patient and choose Select Patient
5. Click on the patient’s name in the bottom name field, opening the Patient Card
6. View the data in the Patient Card to insure that you have selected the correct patient record.

Verify the information with the patient. Incorrect information should be corrected by the business office.
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
Production Report tab- get a report of completed procedures, RVU’s and amount charged to production
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

05/15
Patient Contact List

1. Open Personal Planner
2. Click on Patient Contact List button
3. Wait while the report generates
4. Click on the Print icon to print to a network printer
5. Click on the Export icon to print to a computer file
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 **Create a New Record or Add Patient Form button on top toolbar**.
- Select a form from the drop-down list.

Some forms, like *Medical History*, will not be available in the drop-down 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 modify. Changes will be saved with a new date.

**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 ellipses button**
- Doubleclick on the desired form
- Click **OK** and then complete the form

You can download PDF copies of the forms by setting your computer’s default printer to **PDF** and then printing out the forms.
AxiUm Cheat Sheet for Charting Findings (Existing Conditions and Restorations)

Student

Rolodex - Open Patient Record

Enter last name, first name, OR chart number, press enter. (You can type in just a few letters of the last name to bring up all matching patient names.) Double click so name is in bottom window. Verify proper patient through date of birth and phone number.

EHR- Chart Age of Teeth & Missing Teeth

1. In odontogram (tooth display), click to select tooth or teeth, right click and choose Age Change or Missing. May also use right click- Select Teeth - to choose All Teeth, Maxillary or Mandibular Arch.

Add Findings Via Chart Add Tab

2. Click on (top right of window) to open tab. In Chart Add tab, click on .

3. Add Restorations –
Click on Restorations/Caries category to add existing restorations, sealants, temporary materials, implants and bridges.
Use First tab- Quick List- (go to Full list if not found here)
Choose type of restoration- select tooth surfaces in odontogram-

hit Add Finding button

Text should appear at right in blue text- E in status column - existing restoration

4. Add Caries-
In same category, scroll down Quick List to find caries description, highlight it-

select surfaces from odontogram (red cross hatch appears) hit Add Finding button

Text should appear in blue text- status A- existing caries- red cross hatching in odontogram

5. Add Conditions -(Tipped teeth, diastema, impacted, etc.)

--Choose Conditions category-
select condition from Quick List-
-select tooth in odontogram-
-hit Add finding button.

Text should appear at right with status A for existing condition.

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

When finished, have faculty approve- text will display as pink once approved. 08/15
Adding Planned Treatment

1. Select your patient through the Rolodex. Make sure their name is showing in the message box at the bottom of the axiUm window.
2. Click on the Create a New Record button (top right of screen) to open the tab.
3. Select the radio button (default).
4. Select the tab (default).
5. Select the appropriate category from the list on the left.
6. Single click on Tx choice or click on the + to open folder of options. If you do not see the category or Tx you need, select the tab and repeat steps 4-6. If you want to add phasing and sequencing here, double click the selection to jump from the Codes subtab to the details subtab. Do NOT enter the sites and surfaces by typing in the code.
7. Select the tooth &/or surfaces where required by clicking on the tooth on the odontogram or selecting the quadrant when prompted.
8. Click on the Planned Tx button. Do not add Tx as Inprocess or Complete if you are going to generate a Tx Contract as it will not be included. Only Planned Tx displays on the contract.
9. To correct an error, delete the incorrect entry by highlighting the incorrect entry and clicking on the Delete Record button. Then add the correct Tx.

See instructions on approving treatment and printing a treatment estimate.
Printing a Treatment Estimate for Doctors

We strongly urge you to get signed treatment estimates for all planned treatment. A signature on a contract does not mean that the patient agrees to the treatment, only that they have been informed. Signed contracts document that all problems, potential treatments, and costs were discussed with the patient. Signed forms are stored in Patient Attachments - Business Office - Tx Plans.

For a Tx Estimate, treatment must be planned and approved (not put in process or completed) to display in the Tx Estimates window. Approved, planned tx is also necessary for the Business Office to create payment plans.

1. 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 black Ps).

2. Click on the (Estimate) button

3. Select all the lines of treatment that need to be included in the estimate. Click OK.

4. 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.

6. Click the Print button from the top of the page.

7. AxiUm will prompt for the patient’s signature and print a copy of the estimate with the patient’s signature.
Axium Cheat Sheet for Adding Contact Notes to a Patient Record

Open patient record in Rolodex.

Open Patient Card by clicking on patient name in status bar at bottom of screen or patient chart icon in middle of rolodex screen.

Click on contact notes icon. Type in notes in note window.

Click on ADD patient record icon to add contact note.

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Room 2305
AxiUm Cheat Sheet for Adding General Clinical Notes

1. In the EHR module, Tx History tab -

2. Hit the Add Note button - General note allows free text entry or:

3. To choose a specific note template 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.

The template will now appear and text can be added. Hit Add New to Save. Undergraduate students need faculty approval of notes.

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**EHR Module- Text Colors & Symbols Key for Odontogram/Charting**

In the EHR module- Tx History tab, text colors indicate the following:

- **Green** indicates upcoming recalls and appointments
- **Black** indicates completed and approved treatments
- **Blue** indicates unapproved treatment, notes, forms
- **Red** indicates planned treatment
- **Pink** indicates existing conditions, restorations, caries - findings
- **Brown** indicates in process treatments

**On the odontogram**, different materials are indicated by different colors, if you look on the planned treatment list, you can see the material name in text.

<table>
<thead>
<tr>
<th>Material Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1003</td>
<td>Tipped Mesially</td>
</tr>
<tr>
<td>C1004</td>
<td>Tipped Distally</td>
</tr>
<tr>
<td>C1005</td>
<td>Tipped Buccally</td>
</tr>
<tr>
<td>C1006</td>
<td>Tipped Lingually</td>
</tr>
<tr>
<td>C1007</td>
<td>Shifted Mesially</td>
</tr>
<tr>
<td>C1008</td>
<td>Shifted Distally</td>
</tr>
<tr>
<td>C2001</td>
<td>Partial Eruption</td>
</tr>
<tr>
<td>C2002</td>
<td>Extruded</td>
</tr>
<tr>
<td>C2003</td>
<td>Impacted</td>
</tr>
<tr>
<td>C2003H</td>
<td>Impacted - Horizontal</td>
</tr>
<tr>
<td>C2004</td>
<td>Diastema</td>
</tr>
<tr>
<td>C2005</td>
<td>Crowding</td>
</tr>
<tr>
<td>C2006</td>
<td>Unerupted</td>
</tr>
<tr>
<td>C4010</td>
<td>Periodontal abscess</td>
</tr>
<tr>
<td>C4014</td>
<td>Overhanging margin</td>
</tr>
</tbody>
</table>

**Existing Restorations**
- END, Endodontic Treatment
- M-AMAL, Amalagam
- M-COMP, Composite
- M-GOLD, Gold
- S-SEAL, Sealant
- M-IMPL, Implant
- M-IMPCR, Implant Crown
- M-PFM, Porcelain fused to metal crown
- M-PMTL, Pontic - Metal
- M-PORT, Porcelain
- M-PPORC, Pontic - Porcelain/Ceramic
- NSC, New Smile Crown
- M-SS, Stainless Steel
- M-TEMP, Other Temporary Material

**Caries Risk Assessment Disease Indicators**
- C5001, Dentin caries (in D on x-ray)
- C5002, Recurrent caries lesion
- C5003, Enamel-only caries (incl. white spot, P & F, proximal)
- C5011, Deep occlusal grooves/incipient
- C5021, Root caries

- Indicates there is no graphic on the odontogram, listed as text only

08/2013

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Cheat Sheet for Completing and Approving Treatment

1. With patient selected, open EHR, tab. Students change View to Planned/InProcess for faculty review.

2. Select a line of planned TX and double click.

3. Move Status from Planned to In Process or to Complete.

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.

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.

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.
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.

### 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 non-contiguous 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 Patients* tab.
- Click the *Search* button.

Revised 05/15
Axium Cheat Sheet for Opening Consult Forms

Open the consult form and answer required questions before the consulting doctor enters the cubicle.

In the EHR module, go to Forms tab

Hit the Add Patient form button on upper right toolbar or Create New Record

Use these forms to refer to:

PG Perio consult- PEREF
PG Endo- ENDX
Oral Surgery- SURGRE
Oral Pathology – PATH
PG Pros- PRREF

Choose from the Form drop down menu- OK
Oral Pathology Consults

Text 504-439-1549

Select the PATH form for oral pathology consults.

Send a TEXT MESSAGE stating you are requesting an oral path consult and include:

a. your name
b. your location (cubicle # AND floor #)
c. clinical photos may also be texted along with the request.
d. DO NOT INCLUDE ANY PATIENT IDENTIFIERS VIA TEXT. 

Send a TEXT MESSAGE stating you are requesting an oral path consult and include:

a. your name
b. your location (cubicle # AND floor #)
c. clinical photos may also be texted along with the request.
d. DO NOT INCLUDE ANY PATIENT IDENTIFIERS VIA TEXT.
You are responsible for completing these first two sections:

1. Description of lesion
2. Differential diagnosis

Prior to arrival of pathologist
Adding or Editing Grade Forms

To approve and grade treatment:

Open patient record in Rolodex
Hit aqua chart number button at bottom of screen…Faculty must enter approval code

Grade form will appear- select discipline – then select grade form- add grades – enter approval code.

- To change/edit a grade on a grade form:

Students: to view all grade forms- go to Evaluations module-
Evaluations tab- set date range- Search- view grade forms
Grades tab- set date range- Search- view list of individual grades

- To Add a grade for treatment that was approved but not graded:

Open patient’s chart in Rolodex

Right click on completed and approved procedure and select – Add Student eval

Faculty must enter approval code to access grade form.
To View Treatment on A Specific Tooth or Teeth (revised 4/27/07)

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

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.
AxiUm Training Exercise for Sophomores (D2)

Your laptop on campus:

1) Go to Remote Desktop Connection> Type in the address “lsusd-terminal” next to computer. Hit Connect.
2) Use your LSU username and password in the Windows Server window.
3) Once the home page appears, click on the Axium icon.
4) use your axium username and password in the user authentication window

*Off campus- use Citrix connection- LSUSD website- Citrix Web interface icon

Username: first letter of first name, first 5 letters of last name or LSU username- first 2 letters in CAPS
Password: axium or whatever you changed it to last year

To find your assigned patient:

Click on Personal Planner icon
Click on Assigned Patients tab and hit magnifying glass to search for the patient assigned to you for training. Click on name in list and right click- Select patient- will open the patient record, name appears in status bar at bottom of axium window.

What is your patient’s chart number? ___________

To open patient’s chart outside of Personal Planner:

Go to Rolodex module- type in last name of your patient or enter chart # and hit enter. Rolodex card for this patient opens. Click on patient’s name in list to open record. Name appears at bottom of screen.
Click on red Alert button to view medical alerts for this patient. Close window (black X on top right of alerts window).

Add an Appointment:

Go to Scheduler module
Click on book icon in upper right hand corner of scheduler screen to select scheduling book- Sophomore A or B

Double click on time slot in one column – 1:00 today
Type in last name of patient in rolodex window- hit enter –
Double click on patient name - or select from list on right- Appt Code =OPER
In the New appointment window, click on Tx Plan button
Move procedure you plan to do at this appointment (#18 O resin) from Planned Treatments (left side) to Appointed Treatments (right side)- Close
Hit Accept in New Appointment window -Appointment should now appear in column.
Right click on appt. slot – select patient to open patient record
AxiUm Training Exercise for Sophomores (D2)

To cancel, fail, or delete an appointment- right click on appointment slot. Always indicate if patient failed, canceled or rescheduled appointment. Only use delete if you made appointment by mistake. This will display in patient card.

- Click on patient’s name in status bar at bottom of screen to open patient card.

View upcoming appointments for patient:
- Click on patient’s name in status bar at bottom of screen, appointments can be viewed at bottom of Patient Card window.

Go to EHR module: Forms tab- review the medical history- (click on Medical History under Forms on file if you don’t see it at first)
- What medical alerts are listed at top right next to odontogram?  
  
  Pink indicates unanswered questions, Exclamation point ! means form is incomplete

If you see this alert you must open the medical consult letter to see if there are any physician recommendations
To view the medical consult- go to the Adult Medical History (new) Form- Medical Summary tab- scroll down to Medical Consult line – double click “On File” to see

**See the sample Medical Consultation Request on the next page if it will not open

- Are there any precautions listed at the bottom of the consult sheet?

Go to the Medical History tab (page) of the form – line 03- Answer Yes - the List all meds text box will open. Add this information to the tab called New Medical History. This form is a new revised version of the Old Medical History tab.

- Add medication information as seen below: Current medications under alerts is automatically updated also.

- Practice entering Medical History information by adding answers to questions in form.

- Add Blood Pressure Reading for today’s visit- Medical Summary page- Blood Pressure line under Vital Signs- enter 160/85- enter
Go back to BP line - right click - Show History to see BP readings from previous visits.

### MEDICAL CONSULTATION REQUEST

<table>
<thead>
<tr>
<th>Signing Physician's Return Address:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(Name, Address, &amp; Phone)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dr. Maurice Howard</td>
<td>B.A. Bay Street</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>Kenner, LA</td>
<td>Phone: 504.504.5045</td>
<td>DOB: 11/3/1955</td>
</tr>
<tr>
<td>LSUSD Chart # T87654</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Patient Information**

<table>
<thead>
<tr>
<th>RE: Patient: Beza E. Bez</th>
<th>Address: 123 Jump Street</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 123 Jump Street</td>
<td>Phone: 504.504.5045</td>
</tr>
<tr>
<td>Kenner, LA</td>
<td>DOB: 11/3/1955</td>
</tr>
<tr>
<td>LSUSD Chart # T87654</td>
<td>Date: 04/31/20XX</td>
</tr>
</tbody>
</table>

**Patient Consent**

I agree to release of medical information to LSU School of Dentistry.

Beza E. Bez

**Date: 04/31/20XX**

**Patient Signature:**

**FAX# (504) 941-8350**

**Date: 04/31/20XX**

**Print: Faculty / Student Names**

**Date: 09/30/20XX**

**Faculty Signature:**

**Date:**

**PHYSICIAN'S RESPONSE (CHECK ALL THAT APPLY)**

- Local anesthetic with epinephrine: 100,000 (epi 0.01 mg/ml)
- Intravenous sedation
- Nitrous oxide inhalation sedation
- Sedation (intravenous)
- Extraction with local anesthetic
- Local anesthetic with epinephrine: 100,000 (epi 0.01 mg/ml)
- Dental prophylaxis and scaling
- Endodontics (root canal therapy)
- Restorations (fillings, crowns)
- Prosthodontics (bridges, partials, dentures)
- Extraction with local anesthetic

**Specific treatment concerns:**

- Stress
- Anxiety
- Bleeding
- Infection
- Other:

**Below, please prescribe NTCOAG regimen:**

**Date:**

**Please send letter Health & Physical Exam with this letter:**

**Date:**

**RECOMMENDATIONS:**

- Stop NTCOAG 1 week prior to extractions or surgery; resume 2 days after.
Click on each tab in the bottom half of EHR to become familiar with info found there-

- **In Progress**: Today’s Activities, Pending treatment, health summary
- **Tx History**: Existing restorations, caries, treatment notes, completed, in process and planned treatment, upcoming recalls and appointments
- **Forms**: medical history, consults, Forms on File list on right
- **Attachments**: consents, letters, photos
- **Perio**: perio charts
- **Tx Plan**: Phase 1 and 2 treatment plans added at initial OD
- **Medications**: not in use

**Chart Add** tab is used to chart Findings and add Planned treatment to the original treatment plan for the patient

- click on Create new Record button on top toolbar to open Chart Add tab.

**Add Findings (existing restorations, conditions, caries):**

- Click on Findings button to add findings for a new patient (existing conditions & restorations) or new decay.
- **How to chart missing teeth and primary teeth on the odontogram**
  - Select then Right click on tooth #16, and 32 in odontogram and mark as Missing.
  - Select then Right click on tooth #12 and change to primary tooth (Age change).
- **Select #17 then Indicate that #17 is impacted (conditions- impacted-choose tooth-find finding button)**
- Add caries as a finding on Occlusal surface of tooth #2 and #14.
  1. **Category- Caries- C5003-Enamel-only caries (includes white spot, pit & fissure, prox)** - Select Occlusal surfaces on odontogram for teeth 2 and 14-
  2. Add finding button.

**Add Planned treatment**:
- Choose **Dental Txs** button to add planned treatment.
1. Plan treatment for a Perio Class 2 patient using a macro code - bundles all the procedures needed.
2. Choose Periodontics category -
3. Choose PERIO2S from Quick List

- Hit planned treatment button. (Discipline = Perio)

- Plan amalgams on tooth #2 and #14 -
  1. Operative category - Amalgam - 1 surf - in Quick List
  2. Select Occlusal surfaces on #2 and #14 in odontogram,

- Hit planned treatment button

  - Text for these procedures will be blue because faculty approval is needed. Chart number button in status bar at bottom of screen turns aqua also.
  - Yellow dot on tooth surface in odontogram means planned treatment procedure.
  - Get approval for planned treatment - raise your hand so that Ms. Hansel can approve the planned treatment that you added - Cannot go any further without approval.

- **How to Change Planned Treatment to In Process or Complete**

  Most of the operative treatment you do this year is already planned in the chart. Planned treatment is in red text once it is approved and it appears at the bottom of the Tx History.

  - Go to the Tx History or In Progress tab and double click on the following planned procedures - change Status to Complete.

  ![Status change diagram]

  Blue means unapproved treatment.

  **Very Important: Charges and billing will not be complete until the status of the procedure is changed to complete and approved (black text).**

- **Add Treatment Note: Note must be added at every patient visit.**

  Two ways to add a note - right click on procedure to attach to procedure or click on add note button on right toolbar.
Clinical Notes: click on Add note button on right toolbar - hit ellipsis button next to Code

Choose note template for discipline-UGREST- double click to add to bottom of window.

Fill in note as shown-
Undergraduate Restorative
APPOINTED FOR: Caries on occlusal of #18

MED HX REVIEW: No change in MedHx. Bp 138/82

REASON FOR VISIT: Caries on occlusal of #18
TX: Injected 1 full carpule of Xylocaine w/ 1:100,000 epinephrine IA and lingual, and 1/4 carpule long buccal. Placed rubber dam with 14A clamp. Removed caries, created 3 different preps in distal, mesial, and central pits. Restored with Z100 resin composite shade A2

NEXT VISIT: Complete operative treatment

PATIENT INFORMED: Yes

Complete info in note. Hit Add New

To add a note to a tooth: right click on tooth #7 in odontogram- Tooth Notes/Conditions- Add Note button- add note “composite discolored”-
Note should appear in TX History

Click on aqua chart # button to see what needs approval.

Add a Form (consult or medical history):

Go to Forms tab- hit Add Patient Form button -upper right toolbar- choose form

PATH for Oral Path.- complete as shown below

<table>
<thead>
<tr>
<th>Oral Path Consult</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Question</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oral Pathology Consult</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student/Resident should complete description of lesion before consulting doctor arrives.</td>
<td>white lesion under tongue- 2 mm in diameter</td>
</tr>
<tr>
<td>Description of lesion (location, size, color, symptoms, etc.)</td>
<td>ecchymosis</td>
</tr>
<tr>
<td>Differential diagnosis</td>
<td></td>
</tr>
<tr>
<td>Consulting Doctor</td>
<td></td>
</tr>
<tr>
<td>Reply to consult request</td>
<td></td>
</tr>
<tr>
<td>Follow-up recommendations?</td>
<td></td>
</tr>
</tbody>
</table>

To open an existing file, click on form under Forms on File on right.
If you were unable to reach or schedule a patient:

- **Add a contact note for your patient:**
  Patient card- hit name on status bar- contact notes icon

  Type in “wrong phone number” in the Note text window- hit create new record button to save.

- **Go to the Patient Care module**

  Change the date range to start at 01/01/12- hit Search. All appointments, notes, treatment will display if All Records View is chosen.

- **Send an internal message to Kathy Hansel when both training exercises are complete. (This exercise and Perio Charting Training Exercise)**

  Hit envelope in status bar at bottom of screen.

  Hit create new record button - type in Hansel in the To field and Training exercise in the subject field, in the text window, type “I am finished”. Send 08/15
Axium Training Exercise for Perio Charting

Use the Perio Chart training sheet to aid in completing this training exercise.

1. Open your training patient’s chart in Rolodex, make sure name appears at bottom of screen.

2. Open the Perio charting module or go to the EHR module and choose the Perio tab.

3. Choose the create new record button. Choose Exam Type from the drop down window—“Initial Exam”.
   Enter values as shown on perio chart on next page. Yellow square highlights tooth and one of 3 sites on tooth.
   Use arrow keys to jump to desired site on tooth and numerical keypad to enter values. For each line the acceptable values are shown in the window along with the keys from the keyboard that can be used to enter the value.

4. When you have completed the max right quadrant for one line, the screen shifts to the max left quadrant.
   Use the drop down box to go back to the Max right and continue charting on the lingual.

5. Hit Create new record button or to resume entry in same chart you started.
   If you hit the complete button, you can view but not modify the chart.
   Compare your charting to the chart on the next page.

Go to the Perio chart module.

Allows a full screen view of the perio charting. Hit X in blue toolbar to close this window.

Periodontics Comparison Settings. Choose 2 dates and a condition “Pocket depths” - Accept. A chart showing graph differentials or text appears comparing the readings for the 2 charting dates.

Note: when viewing perio charting in the EHR module, you can use the up arrow to get a full screen view.

Enter charting as seen on next page.
<table>
<thead>
<tr>
<th>Function</th>
<th>KG</th>
<th>Bleed</th>
<th>Plague</th>
<th>PO</th>
<th>Rec</th>
<th>Attach</th>
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<tbody>
<tr>
<td></td>
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<th>Rec</th>
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</tbody>
</table>
Axium Treatment/Notes Entry for Undergrad Clinic- Step-by-Step

- Open patient’s chart from Scheduler or Rolodex. Go to EHR.
- **Forms** tab – check medical history – go to **New Medical History** tab- if the medical history form in this tab is not completed, complete now with patient- completing question 3 will update Current Medications in alerts box next to odontogram (Old Medical History is for reference only)
- **Sig Required button** is pink- have patient sign once form is completed.
- **Tx History** tab- review planned treatment at bottom of page
- **Faculty Start Check**- Faculty selects red student name button- turns green when approved. Planned procedures approved for Start Check will have book icon in planned treatments list now. *(Appointment must be entered in Scheduler with planned treatment to trigger the red Start Check button)*

- **Clinical Notes**: Must be added at every appointment,
  - **Right click on procedure or add note icon** on side toolbar.
    - **Select General Note**
    - **Select note template** - Hit the ellipsis button to display window with code templates- choose discipline- UGREST, UGPE, etc. – double click so that it appears at bottom of screen- note template window appears- **fill in text**- Select tooth site from drop down list-
    - **Add New** to save
  - If the treatment you are doing is not on the treatment plan, see next page **Adding Planned Treatments**

- **At end of session- change status of procedure to In process or complete**-
  - Select the procedure you had approved in the Start Check (you can do this in Tx History or In progress tab)- **double click on procedure and change Status to In process or Competed**

OR right click and **select Complete Treatments or In Process Tx Visit**
Approvals and Grading

Once procedures have been completed and notes are added, faculty approves by hitting chart number button in status bar at bottom of screen.

Charges are not entered until procedures is changed to complete or in process and approved by faculty. Do not bring patient to pay window until faculty has approved treatment and notes. Chart number button turns grey when all is approved.

Adding Planned treatments, you must add it in the Chart Add tab. Click on the Create new Record button on side toolbar to open Chart Add tab: Chart Add.
Select procedure from Quick List- select tooth site and surfaces (if applicable) in odontogram:
select P planned treatment button in tool bar- procedure will appear in blue text- needs faculty approval. If the procedure is completed at this session, the status must be changed to complete and approved again.

Check Grades:

Check grades daily in Evaluations module:
Select date range and Search Evaluations tab displays grade card, Grades tab displays list of individual grades.

Check Production:

Personal Planner module -
Production report or CIP procedures tab – includes only those procedures, planned, in process or completed by you. Select Summary or Detail- Date range- Search (magnifying glass icon).
**axiUm Treatment Entry for Perio Module- Step by Step**

Open patient chart in Rolodex-

1. Open the Perio Charting module, you will see the most recent exam displayed.

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

6. **Save** To Save: To save your work as you go along.

**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*
**Medical-Dental Questionnaire**

**School of Dentistry**

**Date:**

**Print Name:**

**Address:**

**City, State, Zip:**

**Examiner:**

**Marital Status:**

**Occupation:**

**Email address:**

**Sex:**

**Height:**

**Weight:**

**Daytime Phone #:**

**Home Phone #:**

**In Case of Emergency, Contact:**

**Name:**

**Address:**

**City, State, Zip:**

**Marital Status:**

**Occupation:**

**Email address:**

**Gender:**

**If yes:**

**Sex:**

**Height:**

**Weight:**

**Address:**

**City, State, Zip:**

**Phone:**

**Date of Birth:**

**Race:**

**Email address:**

---

### DENTAL HISTORY

**01. Are you presently having a toothache / dental pain?**

**02. Please mark your current level of dental pain:**

<table>
<thead>
<tr>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Pain</td>
<td>Mild Pain</td>
<td>Moderate Pain</td>
<td>Severe Pain</td>
<td>Very Severe</td>
<td>Worst Possible</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**03. Briefly explain your present dental problems or concerns:**

---

**04. Do you bleed excessively after tooth extraction?**

**05. Have you had pain or swelling MORE THAN two weeks after injury or surgery to the face or jaw?**

**06. Any serious reactions to local or general anesthetics (ex: lidocaine, propofol), nitrous oxide?**

**07. Have you ever had any serious trouble associated with any previous dental treatment?**

**08. If yes, explain:**

---

**09. Do you have any sores or bumps in your mouth?**

**10. Do you clench or grind your teeth?**

**11. Are any teeth sensitive to cold or sweets?**

**12. Has a doctor told you to take antibiotics BEFORE having your teeth cleaned or dental treatment?**

---

### MEDICAL HISTORY PART 1

**01. Are you being treated by a medical doctor now?**

**02. Reason:**

**03. Are you taking any medications at the present time?**

**List all:**

**04. Have you ever taken medication to relieve anxiety or depression?**

**05. Sensitive or allergic to any medication?**

**List:**

**06. Have you ever been hospitalized or had any surgical operations?**

**07. Ever had excessive bleeding from a cut or wound?**

**08. Have you ever had cancer? If yes, what kind?**

**09. Do you have pain in the chest upon exertion?**

**10. Shortness of breath after mild exercise or exertion?**

**11. Do your ankles swell every day?**

**12. Do you bruise too easily?**

**13. Any problems sleeping: trouble breathing, use extra pillows, snoring, sleep apnea, sore jaws on waking?**

**14. Are you thirsty and/or hungry much of the time?**

**15. Have you lost or gained weight (more than 10 lbs) in the last year? Reason:**

**16. Do you have frequent infections?**

**17. Has a doctor ever said you had infectious diseases (for example, HIV, hepatitis C, tuberculosis)?**

**18. Do you have frequent headaches or migraines?**

**19. Frequently consume alcoholic beverages? If yes, how many drinks per week?**

**20. Do you currently or have you in the past used tobacco products (chew, cigarettes, cigars, pipe)?**

<table>
<thead>
<tr>
<th>If cigarettes, how many days to smoke one pack (20)?</th>
<th>Number of years you smoked?</th>
</tr>
</thead>
</table>

**21. Have you lived in or traveled to Guinea, Liberia, Sierra Leone or Mali or had contact with an individual with confirmed Ebola Virus Disease within the previous 21 days?**

**22. If yes to 21: any fever, muscle or joint aches, vomiting, diarrhea, abdominal pain, or unexplained bleeding?**

---

**COMPLETE OTHER SIDE**

---
Please check the appropriate box for any condition that you have now or have had in the past. Each line must have one box checked.

## MEDICAL HISTORY PART 2

<table>
<thead>
<tr>
<th>1. CARDIOVASCULAR</th>
<th>6. RESPIRATORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congestive heart failure</td>
<td>COPD chronic bronchitis</td>
</tr>
<tr>
<td>Heart attack or disease</td>
<td>COPD emphysema</td>
</tr>
<tr>
<td>Angina pectoris or chest pain</td>
<td>Asthma</td>
</tr>
<tr>
<td>Acute coronary syndrome</td>
<td>Respiratory allergies</td>
</tr>
<tr>
<td>High blood pressure</td>
<td>Chronic cough</td>
</tr>
<tr>
<td>Stroke</td>
<td>Sinus trouble</td>
</tr>
<tr>
<td>Aneurysm</td>
<td>Tuberculosis (TB)</td>
</tr>
<tr>
<td>Artificial heart valve</td>
<td>Breathing difficulties</td>
</tr>
<tr>
<td>Congenital heart defect or lesion</td>
<td>Flu-like symptoms now</td>
</tr>
<tr>
<td>Heart transplant</td>
<td></td>
</tr>
<tr>
<td>Irregular heart beat</td>
<td></td>
</tr>
<tr>
<td>Heart pacemaker or defibrillator</td>
<td></td>
</tr>
<tr>
<td>Heart murmur, rheumatic fever, MVP</td>
<td></td>
</tr>
<tr>
<td>Other heart problems</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. BLOOD/ONCOLOGY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blood Transfusion</td>
<td>Anemia</td>
</tr>
<tr>
<td>Sickle cell disease</td>
<td>Leukemia</td>
</tr>
<tr>
<td>Hemophilia or coagulation disorder</td>
<td>Tendency to bleed longer than normal</td>
</tr>
<tr>
<td></td>
<td>Delayed healing</td>
</tr>
<tr>
<td></td>
<td>Head and neck cancer</td>
</tr>
<tr>
<td>Chemotherapy or radiation treatment</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. ENDOCRINE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes (If yes, what type? )</td>
<td>Kidney (renal) dialysis</td>
</tr>
<tr>
<td>Thyroid disease</td>
<td>Other kidney disorder</td>
</tr>
<tr>
<td>Chronic steroid therapy</td>
<td>Urinate frequently</td>
</tr>
<tr>
<td>Hormone replacement therapy (HRT)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. NEURAL/PSYCHIATRIC</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Severe headaches, fainting, dizzy spells</td>
<td>Epilepsy, seizures, or convulsions</td>
</tr>
<tr>
<td></td>
<td>Vision problems, glaucoma, eye pain</td>
</tr>
<tr>
<td></td>
<td>Earaches/ringing in ears/hearing loss</td>
</tr>
<tr>
<td></td>
<td>Anxiety attacks</td>
</tr>
<tr>
<td></td>
<td>Psychiatric treatment</td>
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<tr>
<td></td>
<td>Dementia</td>
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<tr>
<td></td>
<td>Depression</td>
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<tr>
<td></td>
<td>Schizophrenia</td>
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<tr>
<td></td>
<td>Bipolar</td>
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<tr>
<td></td>
<td>Eating disorders (anorexia, bulimia)</td>
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<tr>
<td></td>
<td>Sleep disorders</td>
</tr>
<tr>
<td></td>
<td>Learning disorders</td>
</tr>
<tr>
<td></td>
<td>Alcohol or drug abuse</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. GASTROINTESTINAL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gastritis/ulcers/reflux disease</td>
<td>Autoimmune disorders (Lupus, Sjogren's...</td>
</tr>
<tr>
<td>Ulcerative colitis</td>
<td>Enlarged lymph node or gland</td>
</tr>
<tr>
<td>Crohn's disease</td>
<td>Other organ or cell transplant</td>
</tr>
<tr>
<td>Persistent diarrhea/constipation</td>
<td>Hyperbaric oxygen therapy</td>
</tr>
<tr>
<td>Hepatitis (If yes, what type? )</td>
<td>Disease, condition, or allergy not listed?</td>
</tr>
<tr>
<td>Cirrhosis</td>
<td>(Describe here: )</td>
</tr>
<tr>
<td>Yellow jaundice</td>
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<tr>
<td>Other liver disease</td>
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</table>

<table>
<thead>
<tr>
<th>7. SKIN / MUCOSA / MUSCULOSKELETAL</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Heart pacemaker or defibrillator</td>
<td>Allergy to latex (rubber gloves)</td>
</tr>
<tr>
<td>Heart murmur, rheumatic fever, MVP</td>
<td>Skin rash, hives, itching</td>
</tr>
<tr>
<td>Other heart problems</td>
<td>Dark mole(s) or recent changes</td>
</tr>
<tr>
<td></td>
<td>Melanoma</td>
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<tr>
<td></td>
<td>Fibromyalgia</td>
</tr>
<tr>
<td></td>
<td>Sore muscles and joints</td>
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<tr>
<td></td>
<td>Rheumatoid arthritis</td>
</tr>
<tr>
<td></td>
<td>Artificial joint</td>
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<tr>
<td></td>
<td>Arthritis</td>
</tr>
<tr>
<td></td>
<td>Other skin disorder</td>
</tr>
<tr>
<td></td>
<td>Intravenous (IV) bisphosphonates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>8. GENITOURINARY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemotherapy or radiation treatment</td>
<td>Sexual transmitted disease (STDs):</td>
</tr>
<tr>
<td></td>
<td>syphilis, gonorrhea, genital herpes,</td>
</tr>
<tr>
<td></td>
<td>chlamydia, HIV+ / AIDS</td>
</tr>
<tr>
<td></td>
<td>Kidney (renal) dialysis</td>
</tr>
<tr>
<td></td>
<td>Other kidney disorder</td>
</tr>
<tr>
<td></td>
<td>Urinate frequently</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>9. ORAL / FACIAL PAIN</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dry mouth (xerostomia) or burning tongue</td>
<td>Mouth ulcers or fungus (candidiasis)</td>
</tr>
<tr>
<td></td>
<td>White/red/discolored areas in the mouth</td>
</tr>
<tr>
<td></td>
<td>Nerve pain (neuralgias)</td>
</tr>
<tr>
<td></td>
<td>Pain in facial muscles</td>
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<tr>
<td></td>
<td>TMD or TMJ (jaw joint/muscle) pain, noise</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>10. OTHER CONDITIONS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Autoimmune disorders (Lupus, Sjogren's... )</td>
<td>Enlarged lymph node or gland</td>
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<tr>
<td></td>
<td>Other organ or cell transplant</td>
</tr>
<tr>
<td></td>
<td>Hyperbaric oxygen therapy</td>
</tr>
<tr>
<td></td>
<td>Disease, condition, or allergy not listed?</td>
</tr>
<tr>
<td></td>
<td>(Describe here: )</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>11. FEMALES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you nursing a child or infant now?</td>
<td>Are you pregnant now?</td>
</tr>
<tr>
<td></td>
<td>Do you plan to become pregnant soon?</td>
</tr>
<tr>
<td></td>
<td>Did you have any complications during pregnancy? (If never pregnant, answer no)</td>
</tr>
<tr>
<td></td>
<td>Do you have trouble with your period? (If you don't menstruate, answer no)</td>
</tr>
</tbody>
</table>

To the best of my knowledge all the answers on both sides of this page are true and correct. If I have a change in my health information, I will inform my dentist at my next appointment.

Signature of Patient (18 or older)/ Parent / Guardian __________________________ Date __________________________