axiUm cheat sheet for Personal Planner

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

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