# axiUm cheat sheet for Personal Planner



Personal Planner  Lists CIP Procedures Patient Contact List Production Report Postgrad				1- Select tab 2- Select date range 3- Hit search to run report		rt		
	Provider User	G1234567 Postgrad, John		Date Date	From 05 To 05	5/15/2015 5/29/2015	2	
Reason							Reason	
Unapproved Assigned Pts Appointments Chart Requests Pt Needs Overdue Pts Assigned Forms			d Forms				Appointment 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	Se	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

05/15