Instructions

This is a click by click walkthrough in axiUm:

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

A. Searching for a Patient

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

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
6) Chart is locked, click on lock
   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

1) On the Desktop, Click to open Scheduler
2) On the toolbar, Click on the Book icon
3) From the list Click to select the correct Appt. Book
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

1) On the Desktop, Click to open Scheduler
2) On the toolbar, Click on the Book icon
3) From the list Click to select the correct book
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
8) In the Search Area type search criteria, examples are:
   a. LastName (Enter)
   b. , (comma)FirstName (Enter)
   c. Name, (comma)First (Enter)
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:
    a. Edit the Date/Time/Clinic in the New Appointment screen
    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)

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

E. Adding/Finding Forms (Medical Hx, Consults)

1) With Patient's chart open, go to the EHR module
2) Forms tab- Click on + sign next to form in Forms on file to 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

F. Adding Clinical Notes

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

G. Adding Findings (caries,existing rest)

1) With Patient's chart open, go to the EHR module
2) Odontogram- right click to indicate missing teeth, Age Change to 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 <u>not used to enter treatments (see H).</u>

6) 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
2) Click on Add Record to open Chart Add tab
3) Dental Txs radio button
4) Select procedure code + select tooth/surfaces in odontogram
5) 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.**
4) 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 khanse@lsuhsc.edu

Billing questions: Angela Jones 941.8138

Medicaid questions: Jeff Schluter 941.8183