




### 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


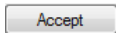
- 1) On the Desktop Click to open Rolodex 
- 2) In the Search Area type search criteria, last name, first or chart # (Enter)  
  
Note: If Practice at top of screen is not correct, go to Tools on toolbar- Set axiUm Defaults & select from drop down menu
- 3) Results are displayed in the Search Results 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 planned treatments for appt  

- 14) Click the Accept button 
- 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)

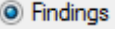
- 1) With Patient's chart open, go to the EHR module 
- 2) Forms tab- Click on + sign next to form in Forms on file to expand and then click on date of open an existing form
- 3) To add a new form-   
Only one Medical History is opened & updated  
Select from drop down list to add consults & other forms

#### 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,UGORTH0,UGPE,UGREMPR,UGREST are note guides for appropriate disciplines in Undergrad Clinic.



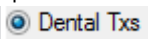

#### G. Adding Findings (caries,existing rest)

- 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 not used to enter treatments (see H).



- 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 Tx 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**

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