LSU Health New Orleans School of Dentistry

axiUm User Guide

Kathy Hansel

2019

How to use this manual:

Faculty, Residents, Students- this manual is a printed version of the topics listed on the axiUm Help page in the LSU School of Dentistry Learning Center. Training exercises, approval codes and department specific materials are provided during training sessions.

Staff- cashiers, hospital admit techs, dental assistants- training materials for specific duties related to each position and department are provided during individual training sessions.

Kathy Hansel

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AxiUm User Guide

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Help on top toolbar - Custom Help Files links to Axium Help page on LSU SOD– Learning Center axiUm Help Files links to Additional axiUm Help

Access to AxiUm: **Axium is installed on clinic and library computers only. To accesss axiUm on your personal laptop, see the instructions below.**

Off Campus Citrix **Storefront**

1. Go to **LSU Health New Orleans School of Dentistry Home Page** http://www.lsusd.lsuhsc.edu/
2. Select **Quicklinks on upper right - Select Citrix Storefront from dropdown menu- Use LSU username & password**

3. **Select APPS button when LSU Health window opens**, **select Axium icon**- log on using **axiUm logon and password**
4. **To access Schick (CDR Dicom**), select **DESKTOPS** button in **LSU Health** window- **Desktop-New** icon
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. **CDR Dicom for Windows** opens Schick radiographs program.

LSUHealthNewOrleans
School of Dentistry

On Campus

1. Access axiUm through **Remote Desktop Connection**
2. Go to **Start> in Search field, enter "Remote Desktop"**
3. When **Remote Desktop Connection** window opens- enter in 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.

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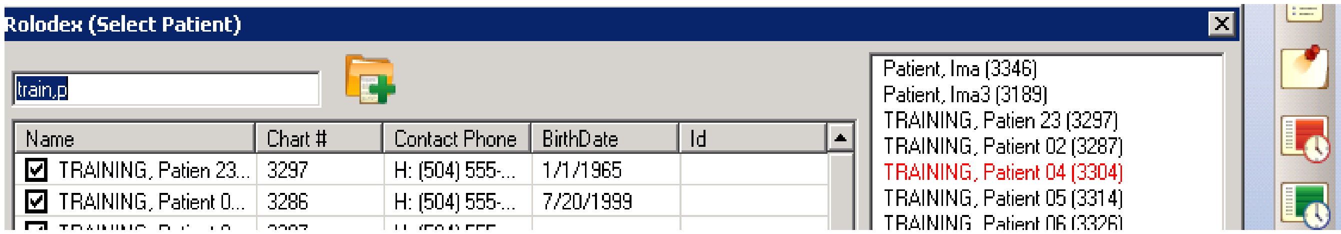
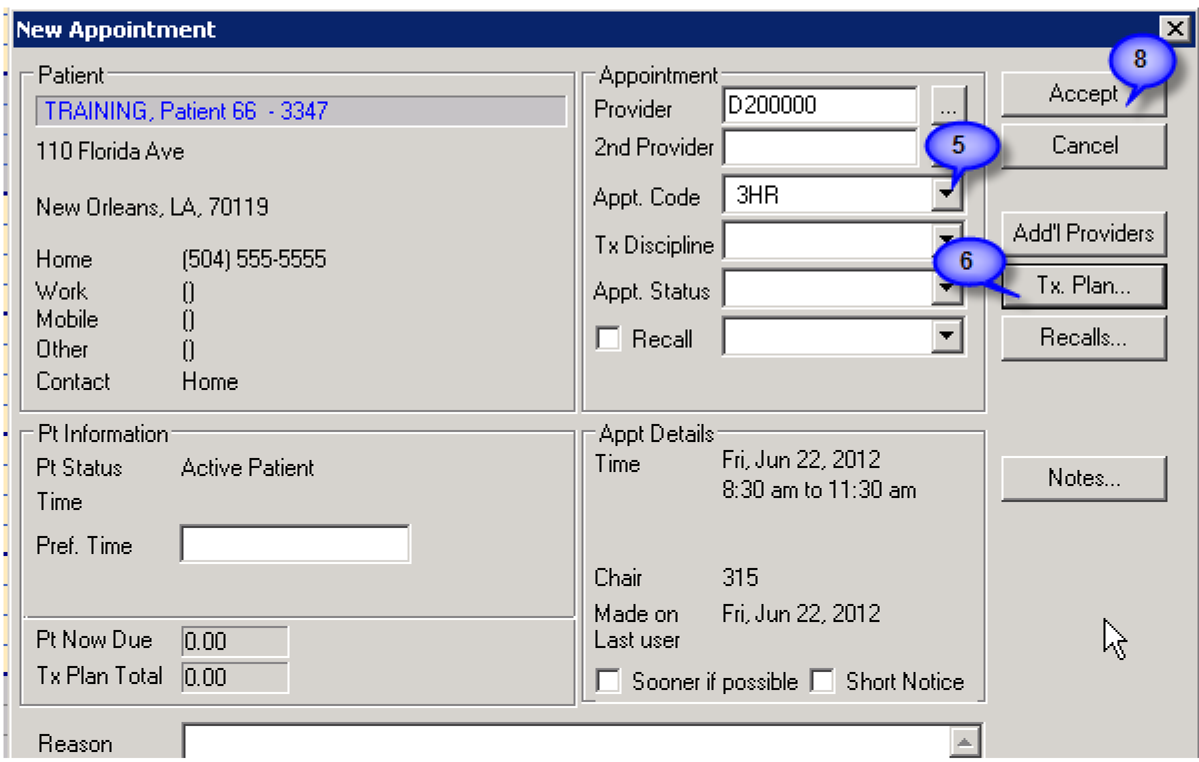
Scheduling Patients

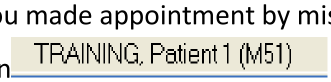
Go to Scheduler module 

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. **choose appointment** length by choosing Appt Code
6. In the New appointment window, click on **Tx Plan** button
7. **move procedure** you plan to do at this appointment from Planned Treatments (left side) to Appointed Treatments (right side)- Close
8. hit **Accept** in New Appointment window



To open a chart -Right click on an apointment – **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.

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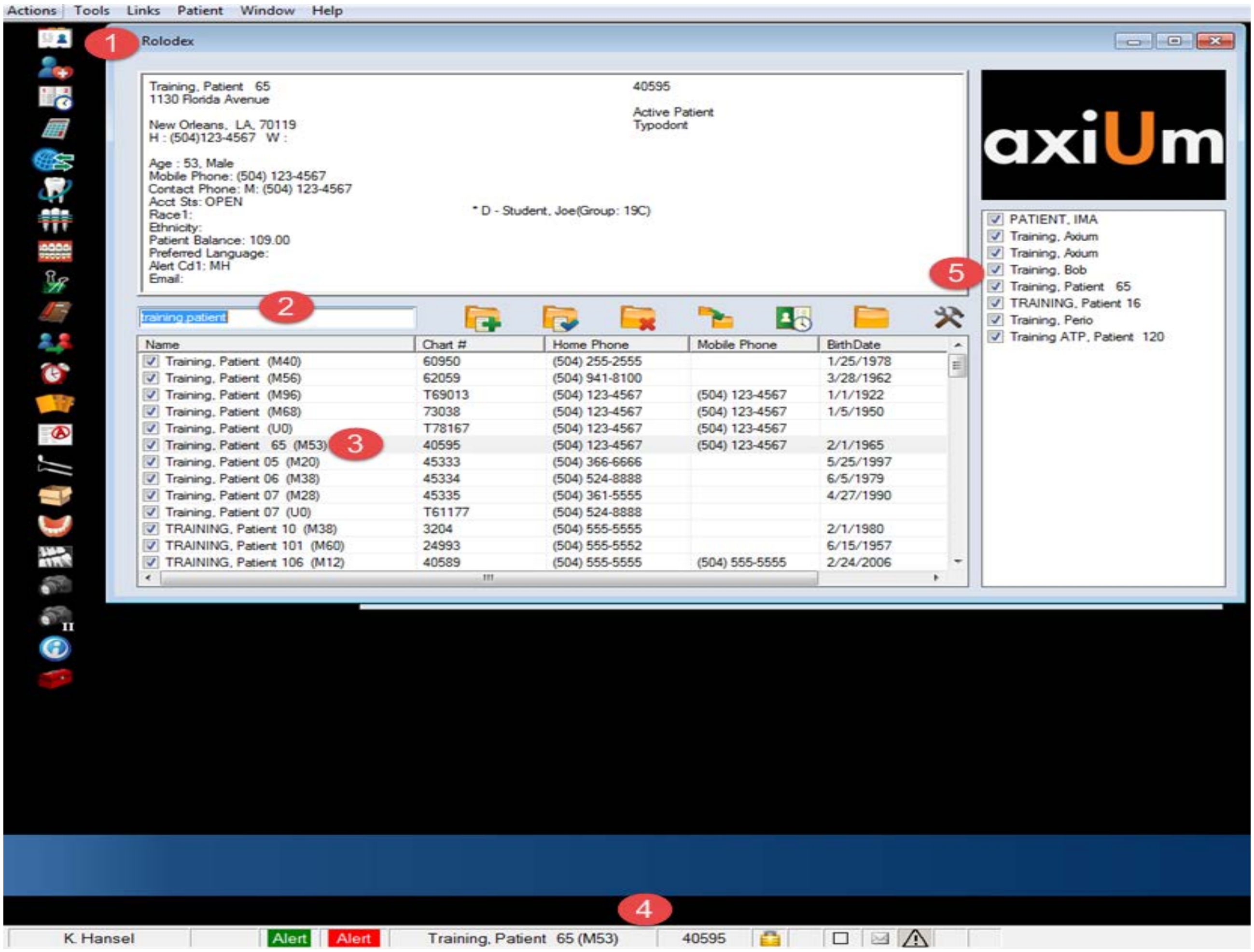
06/2019

Selecting a Patient Via the Rolodex



1. Click on Rolodex button.

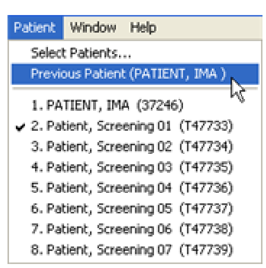
2. In name field, type in the last name, (and as little of the first name as is necessary to pull up a reasonable list of names) You can also search by chart #, phone number (omit area code), birthdate, and first name (,Mary). If you fail to adequately narrow down your search (eg. Smith) you significantly increase search time and number of names to scroll through.

3. Click on the patient's name. Make sure that the patient's name displays in the bottom name field.

4. 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.

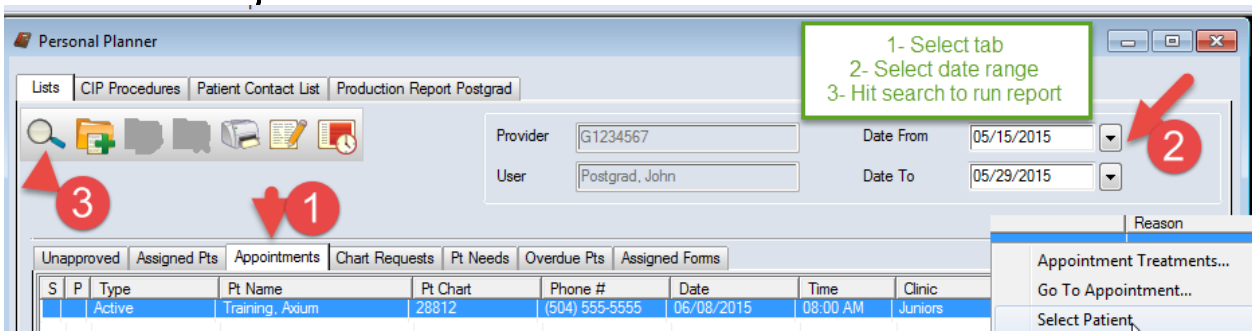
5. To hold the name in your notepad for easy selection on another day, check the box on the left. If the patient's name is in the notepad, a single click will select the patient.

<u>**Opening Charts from other modules**</u>: Selecting **Patient** on top toolbar allows you to open previous patient's chart and those patients listed in notepad list.



05/2018

axiUm cheat sheet for Personal Planner 



<u>Unapproved tab- To see if any of your patients' treatment is still unapproved:</u>

- Select the unapproved treatment tab… choose "date from" for the date range desired… hit search button 
- Check this on a weekly basis.

<u>Assigned Pts tab- To get a list of patients assigned to you:</u>

- 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.

<u>Appointments tab- To search for your appointment schedule:</u>

- 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

<u>CIP Procedures tab- a list of completed, in process and planned procedures entered by you only</u>

- Select CIP Procedures tab…select date range---OK…also has production amounts

<u>Patient Contact List tab- list of your assigned patients with phone numbers</u>

- Select Patient Contact List tab…may be more than one page…select arrows next to 1 at top of report to see more pages

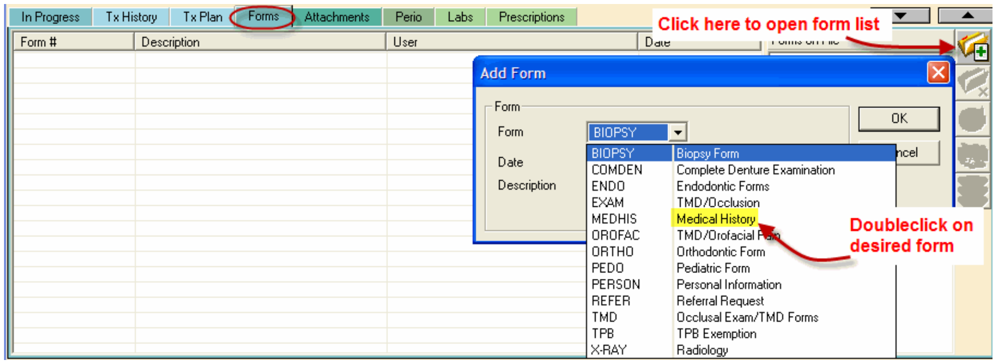
05/15

Finding Forms

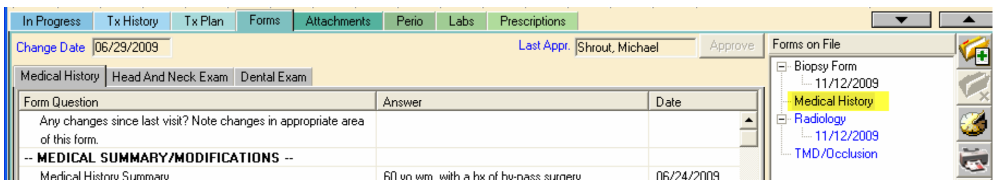
Forms can be accessed in two places in axiUm: the *Forms* tab and the *Attachments* tab. This document serves to distinguish where users can find forms rather than how to complete them.

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.

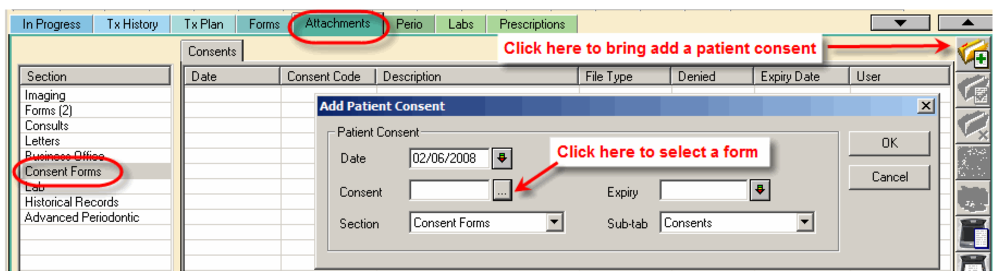


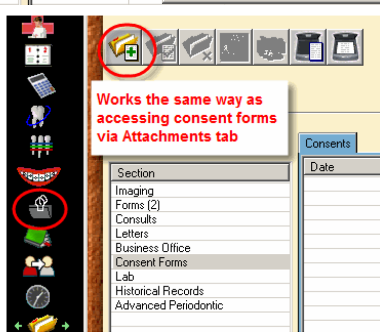
Some forms, like *Medical History*, will not be available in the drop-down list once data is added to the form. Rather, the form will display in the *Forms on File* window. Click on the form there and modify. Changes will be saved with a new date.

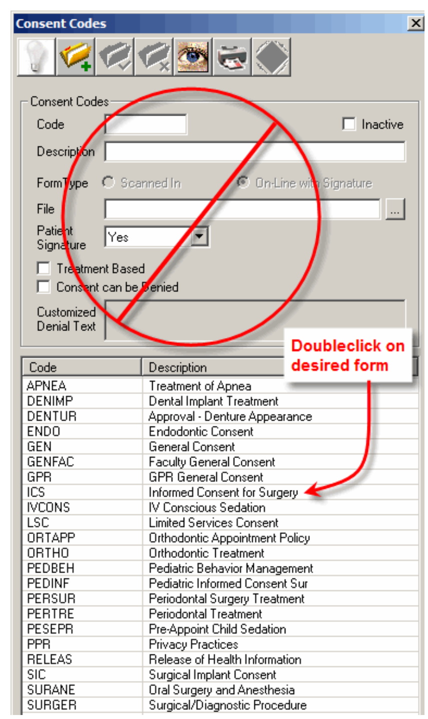


Attachments Tab

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

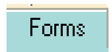






You can download PDF copies of the forms by setting your computer's default printer to *PDF* and then printing out the forms.

Axium Cheat Sheet for Opening Referral/Consult Forms

In the **EHR module**, go to Forms tab 

Hit the **Add Patient form** button on upper right toolbar  or Create New Record 
Select the appropriate form form the drop down list:

PG Endo- ENDX -CONSULT ENDO, DX & REFERRAL
GPR- REFERRAL GPR
Oral Pathology – PATH -CONSULT ORAL PATHOLOGY
Oral Surgery- SURGRE -REFERRAL ORAL SURGERY
PG Ortho- CNS- CONSULT ORTHO
PG Perio- PEREF- REFERRAL PG PERIO
PG Pros- PRREF- REFERRAL PG PROS

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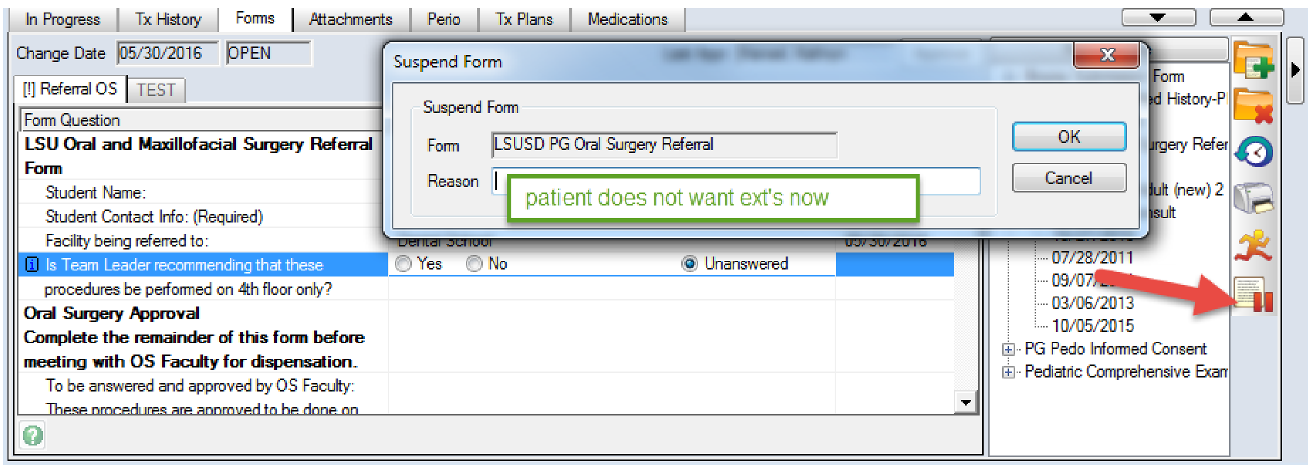
Suspending Forms in axiUm

Forms can be suspended if they cannot be approved or completed for various reasons.
Suspending the form removes it from the unapproved items list in Personal Planner
The form can be re-opened at a later date without losing the information.

Hit the Suspend button (pause button on side toolbar)- enter a Reason and have faculty approve. 

To reopen the form at a later date if needed, just hit the Play button and have faculty approve. 



<u>Charting Findings (Existing Conditions and Restorations) in axiUm</u>

Open the patient's chart in the **Rolodex**

Open the EHR (Electronic Health Record)

1. **Chart Missing Teeth & Primary Teeth**

In odontogram (tooth chart in top half of EHR window), click to select tooth number box or several teeth, right click and select **Missing**. **Right click- Select Teeth** -to choose **All Teeth** or **Maxillary** or **Mandibular Arch- Missing**. M now appears in missing tooth space.

Right click option **Age Change** changes tooth to primary tooth letter**.**

2. **Add Findings Via Chart Add Tab**

Click on (top right of window) to open Chart Add tab.

In **Chart Add** tab, click on Findings

- **<u>Add Existing Restorations</u> –**

Select **Existing Restorations Category** to add existing restorations, sealants, temporary materials.

Use First tab- **Quick List**- (go to Full list if not found here)

Select **restoration material** (amalgam, composite, etc.)

Select **tooth surfaces** in odontogram-

Hit **Add Finding** button

Text should appear in window under **Add Findings** button at right in blue text (students need approval)

E in status column =existing restoration

Sts	Code	Site	Surface	Phase	Description
E	M-AMAL	21	DO	0	Amalgam

- **<u>Add Existing Conditions</u>** –

Select **Existing Conditions Category** to add tooth conditions (Tipped teeth, diastema, impacted, etc.)

Use First tab- **Quick List**- (go to Full list if not found here)

Select **condition** from list**.**

Select **tooth numbers** in odontogram-

Hit **Add Finding** button

Text should appear in window under **Add Findings** button at right in blue text (students need approval)

A in status column= existing condition

- **<u>Add Caries-</u>**

Select **Caries Category** to add caries found during clinical & radiographic exams.

Use First tab- **Quick List**- (go to Full list if not found here)

Select **restoration material** (amalgam, composite, etc.)

Select **tooth surfaces** in odontogram-

hit **Add Finding** button

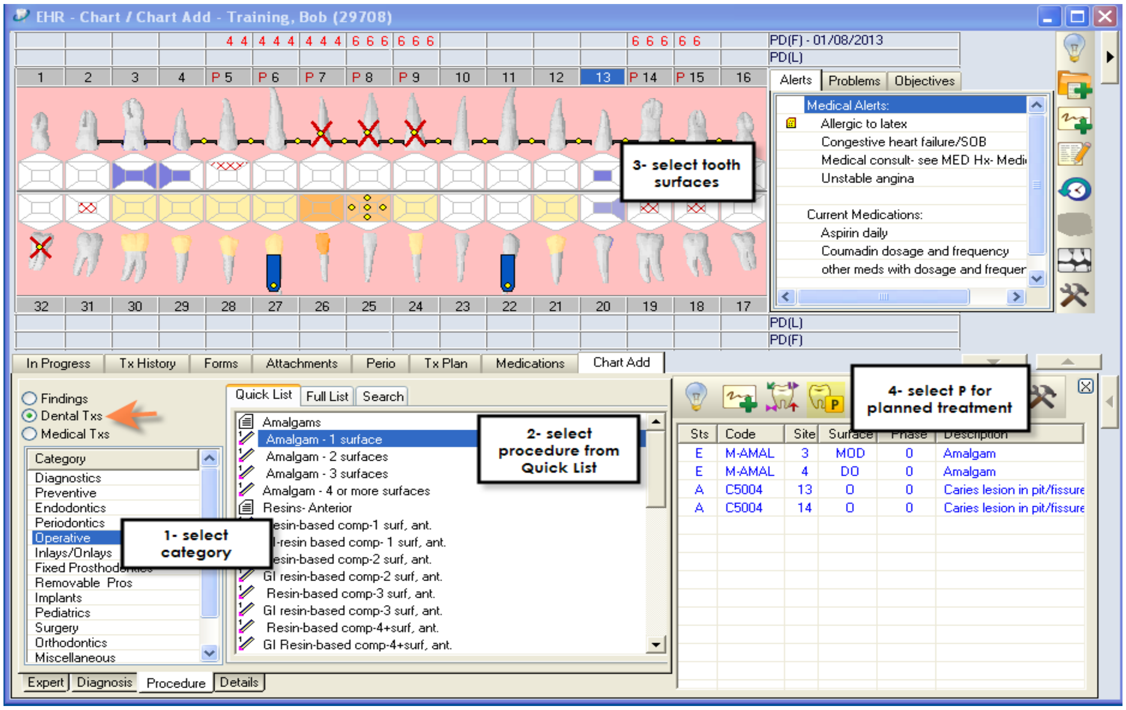
Text should appear in window under Add Findings button at right in blue text (students need approval)

A in status column= existing caries

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

When finished, have faculty approve- text will display as pink once approved. ***05/2018***

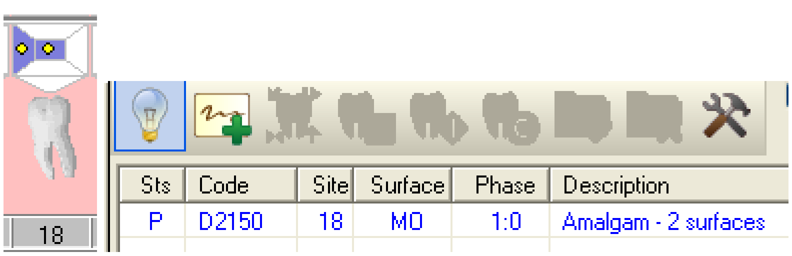
Planning treatment in the Chart Add tab



If procedure is not already planned, it must be added in the Chart Add tab:

Hit **create new record button** to open **Chart Add tab** 

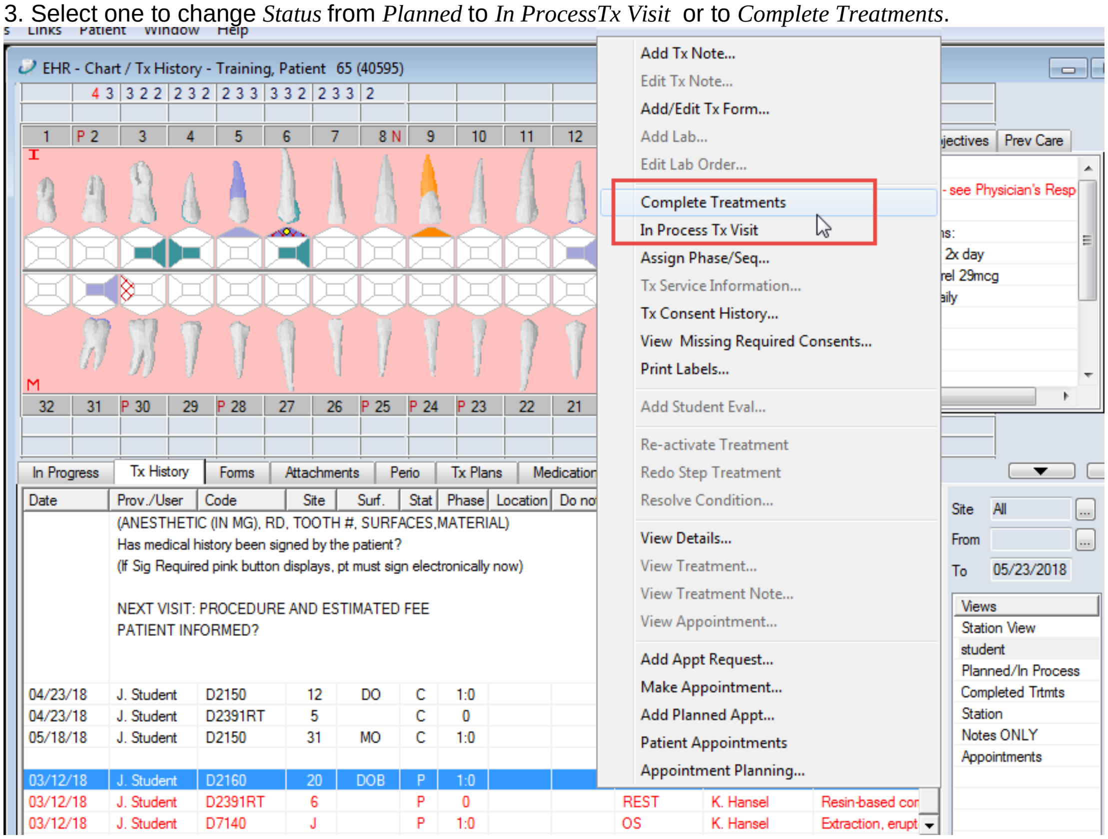
To Add treatment –
1) select category 2) select procedure from Quick List – 3) select tooth site and surfaces (if applicable) in odontogram- select **P** planned treatment button  in toolbar
Planned procedure will appear in blue text if it needs faculty approval- Yellow dots appear on tooth surfaces in odontogram



Completing and Approving Treatment

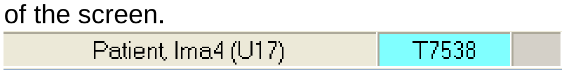
1. With patient selected, open  EHR, 

tab.
2. Select a line of planned TX and right click.
3. Select one to change *Status* from *Planned* to *In ProcessTx Visit* or to *Complete Treatments*.

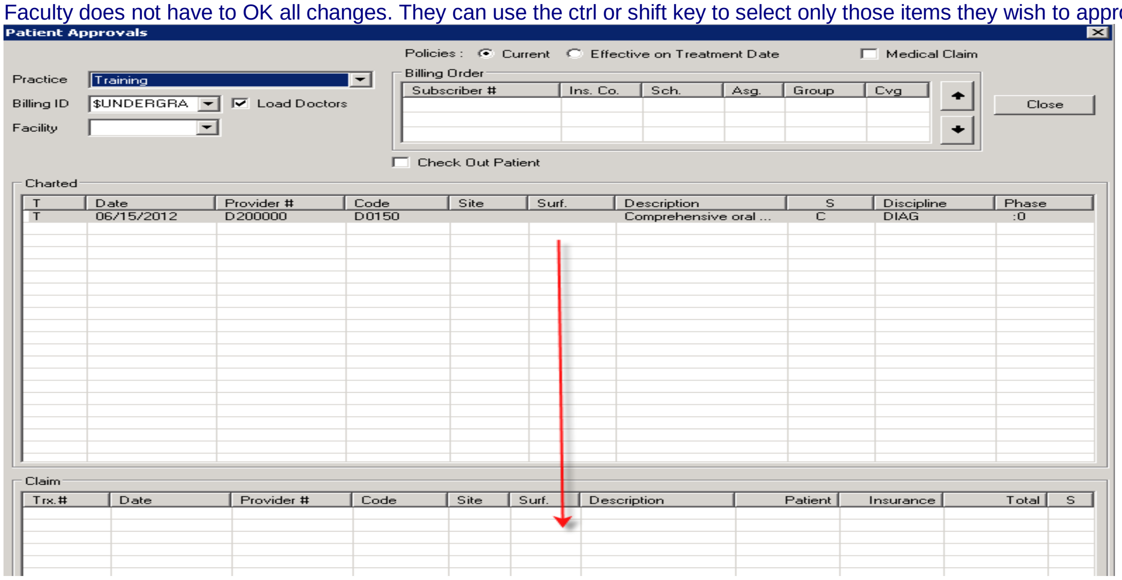


4. Click OK. For students, the treatment will now appear in blue on the Tx History screen indicating that it requires approval. For faculty and residents, the treatment automatically is approved and goes to billing.

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.

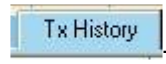


6. This opens the *Check Out Patient* window. Faculty approve by entering their approval code, moving all highlighted tx to the *Claim* screen on the bottom, signifying that the treatment charges have gone to *Billing*.
Faculty does not have to OK all changes. They can use the ctrl or shift key to select 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.

Adding General Clinical Notes in axiUm

1. In the **EHR module- Tx History** tab 

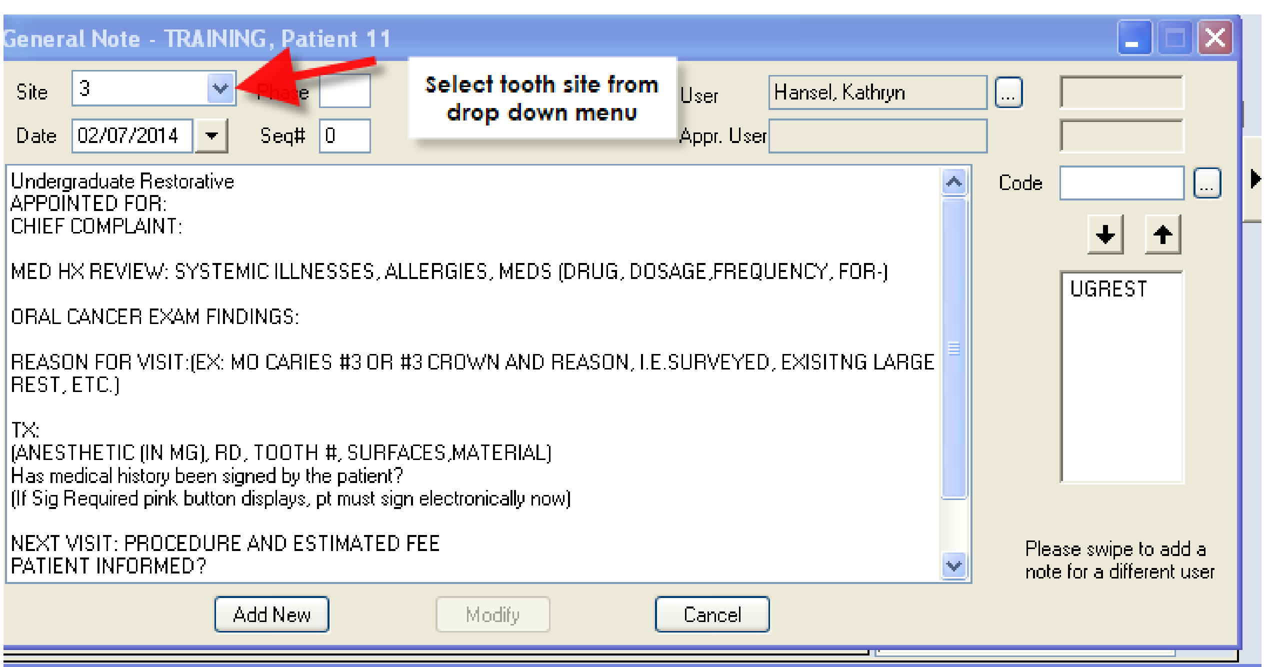
-

2. Hit the **Add Note** button  General note.

To choose a specific note guide 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.

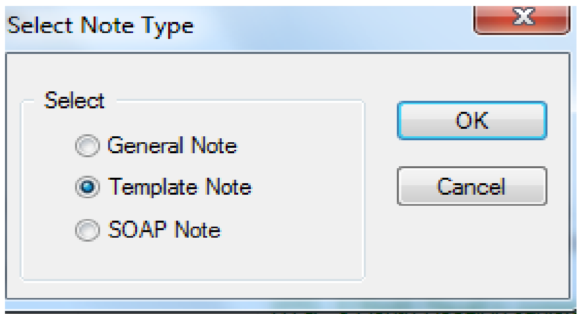
The note guide (IN CAPS) will now appear and text can be added. Hit **Add New** to Save.



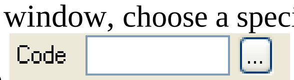
AxiUm Cheat Sheet for Adding Clinical Notes  Using Template Notes

-  In the EHR module, Tx History tab
- 

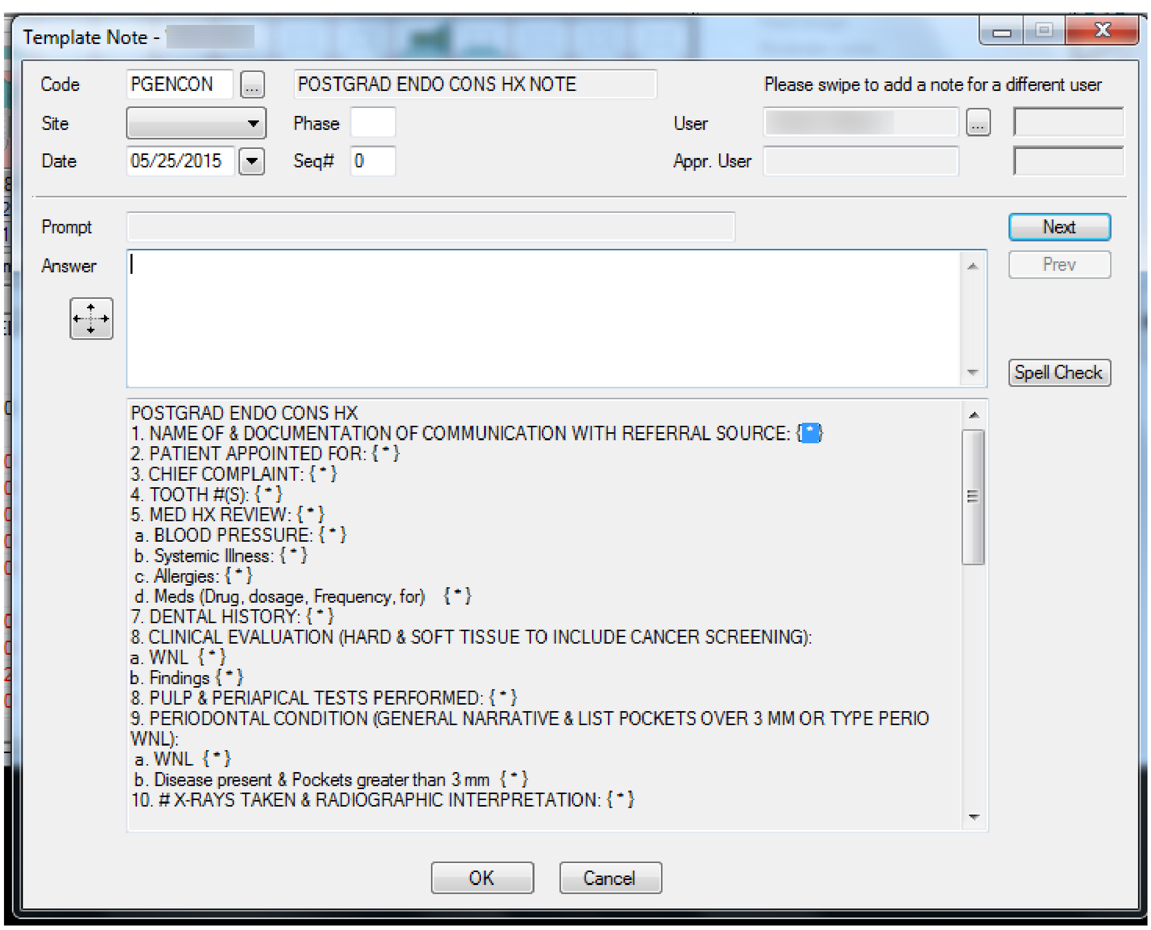
- Hit the Add Note button  (top or bottom toolbar)



Select Template Note

- In next window, choose a specific note guide for a department, hit the ellipsis button next to Code 

- Select the note template code. Add text in areas where asterisks appear. Hit OK to save.



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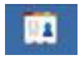
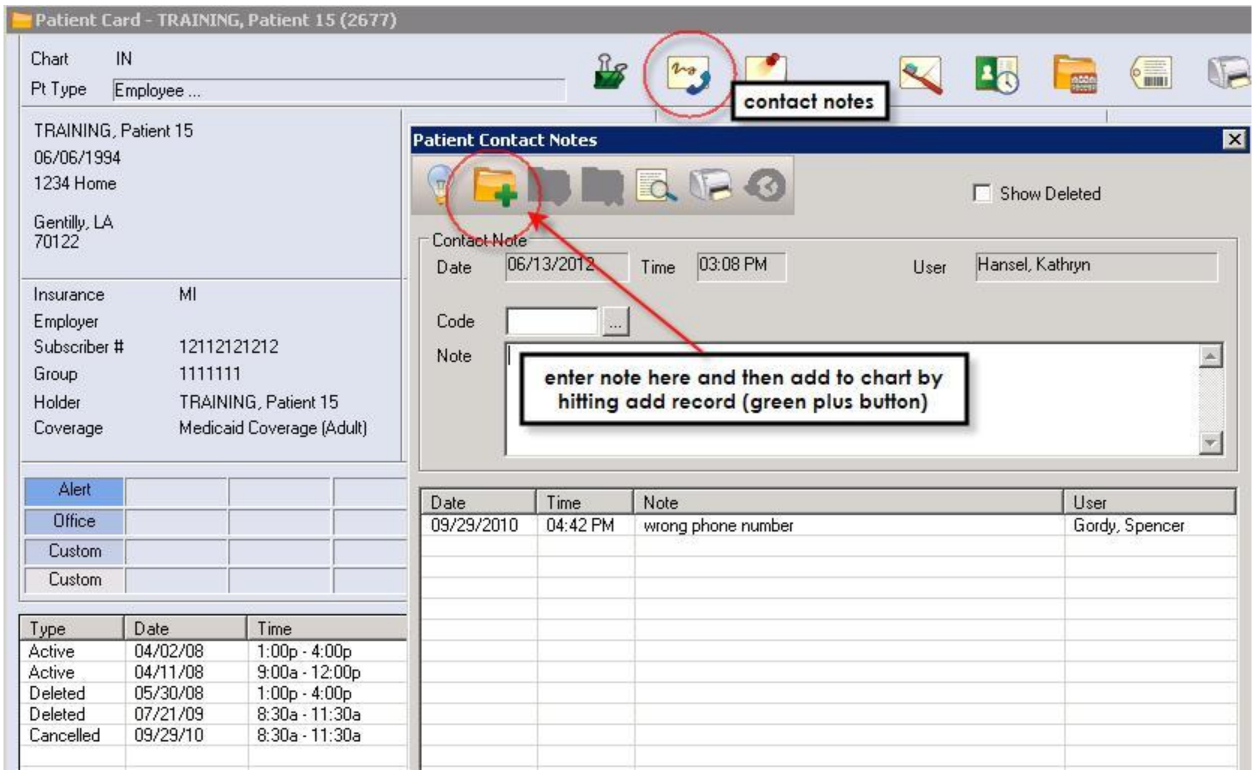
Axium Cheat Sheet for Adding Contact Notes to a Patient's Chart

Open patient's chart in **Rolodex**. 

Open **Patient Card** by clicking on patient's name in status bar at bottom of screen or chart icon

 in the middle of **Rolodex** screen.



Click on **contact notes icon**. Type in notes in **Note** window.

Click on **Add a New Record** icon to add contact note.

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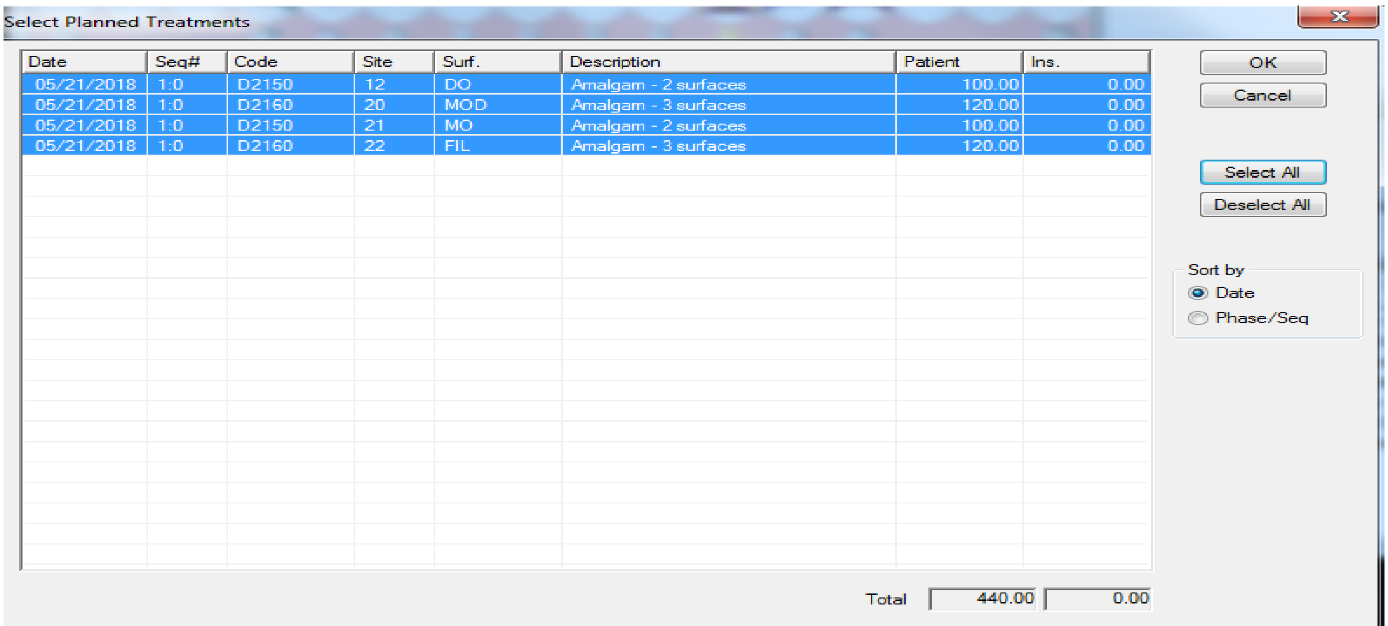
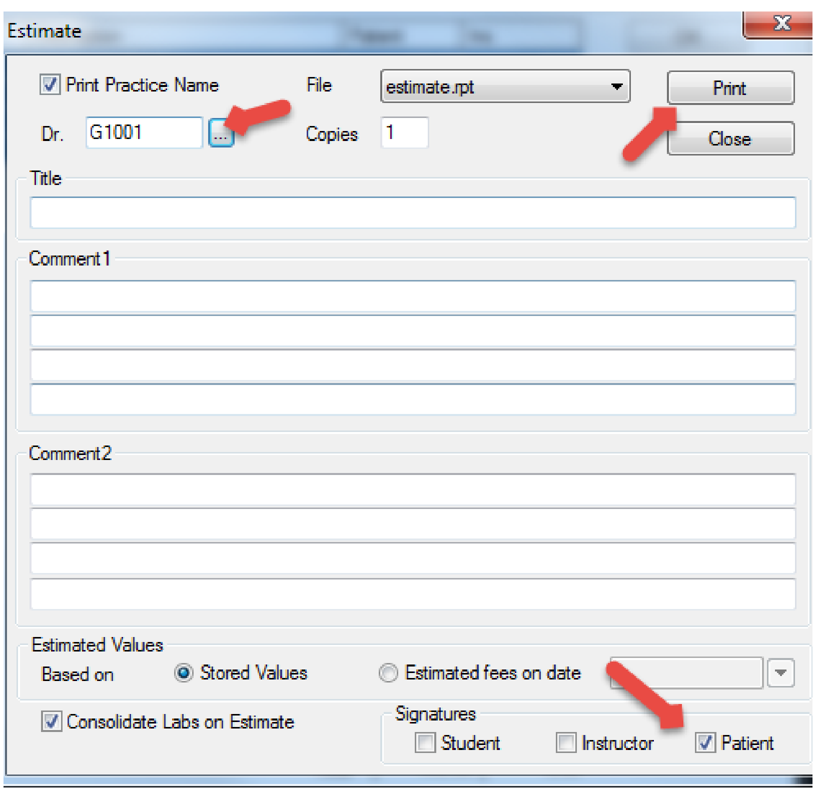
Printing a Treatment Estimate

For a Tx Estimate, treatment must be planned and approved (not put in process or completed) to display in the *Tx Estimates* window.

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 red 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.

Tx Plans Cheat Sheet

To create a new treatment plan, select **Add New Record**

1- Enter **Tx Plan Description- e.g., Phase 1 or Phase 2**

2- Enter **Chief Concerns** in patient's own words

3- **Problems** –select **New item** -Problems field –search problems with ellipsis button

Hit (green checkmark) to Save X closes the box (To delete- select item and right click)

4-Diagnoses- click on **New Item** – Diagnosis field- ellipsis button to select from list.

Hit (green checkmark) to Save, X closes the box (To delete- select item and right click)

5- **Tx Option 1** –**New item**

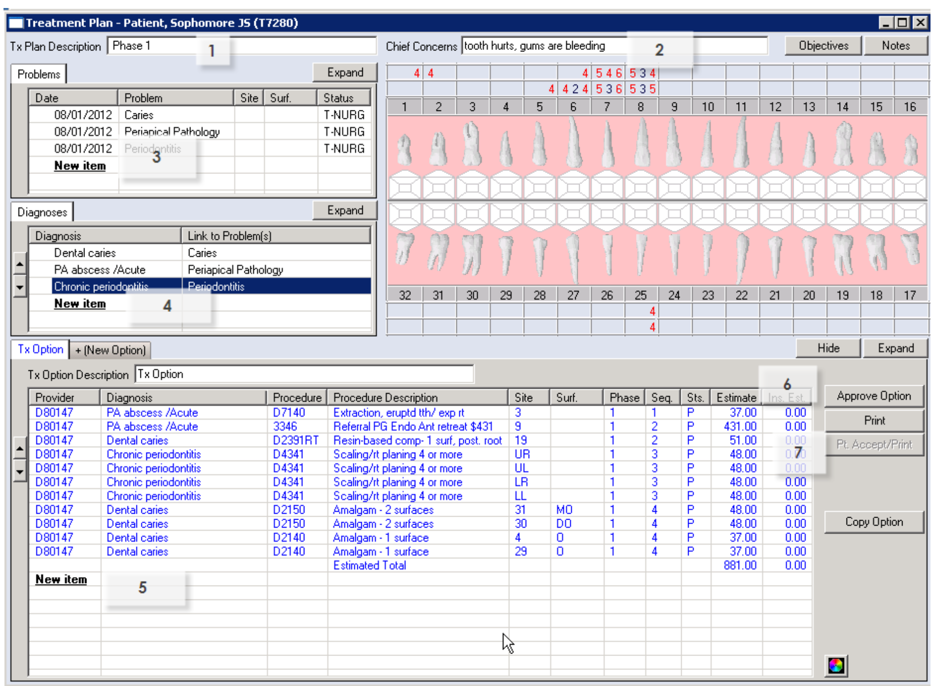
Select **Diagnosis** from drop down list

Select **Procedure** from **Quick List** , Select **Tooth Site/Surfaces** in odontogram

Hit (green checkmark) to Save

6-Faculty Approval- **Approve Option- text is green when approved**

7- Pt Accept/Print- patient signs treatment plan- after signing, planned treatments will appear at the bottom of the **Tx History** tab



Close treatment plan window to return to first screen

Note: *Only* ***one*** *option can be approved. Planned treatments in the New Option tab can be used for reference (Phase 2 plannng) or to document presenting other treatment options to the patient.*

Notes for Treatment Planning:

Add **Findings first in **Chart Add** tab- existing restorations, tooth conditions, caries; missing teeth indicated in odontogram.

Tx Plan Description:

Chief Concerns:

Problems:

Diagnoses:

Planned Treatments:

Findings/ Treatment	Findings/ Treatment
1	17
2	18
3	19
4	20
5	21
6	22
7	23
8	24
9	25
10	26
11	27
12	28
13	29
14	30
15	31
16	32

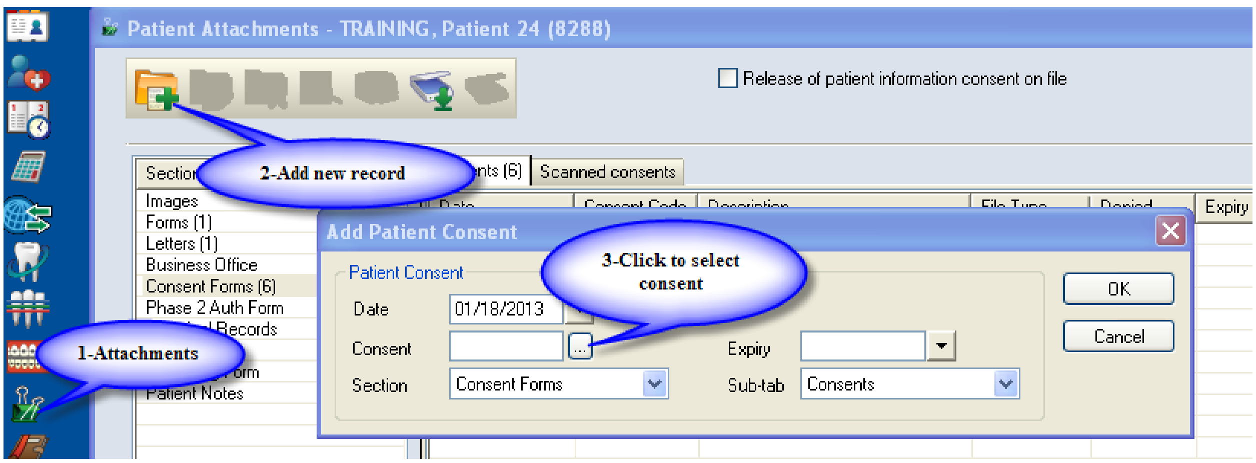
Adding and Signing a Consent Form

Open the patient's chart in the Rolodex

1-Go to **Patient Attachments Module** 

2-Click on **Add new record button**- green plus sign 

3- cClick on **ellipsis button** to find the consent in list- double click on consent so that code appears in box GENCN2  (this is the general consent form that everyone signs, there are many others for other procedures)



4-Hit **OK** button in **Add Patient Consent** window

5-If **Enter Parameter Values** window appears, SELECT EACH FIELD AND ENTER ANSWER IN DISCRETE VALUE before hitting **OK** button.

(*Image of consent appears so that patient could view it- patient should have been given a copy on a clipboard to read before signing)*

6-**Close window** with red X at top right of window 

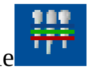
7-Patient Signature window appears- **have patient sign and hit OK**

8-Witness signature window appears- **type your name and sign**

(Some consents have an additional window for doctor's name and signature)

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. 

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.

To save and close a chart that you wish to resume at a later date

To save a completed chart,does **NOT** allow re-entry at a later date to resume the exam

Toolbar buttons:

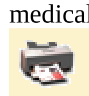
 View form history, view a list of forms and see which ones are complete or incomplete, can reenter incomplete exams

 full mouth view of perio screen

 can choose to compare selected exams graphically or text only

 opens the medical history

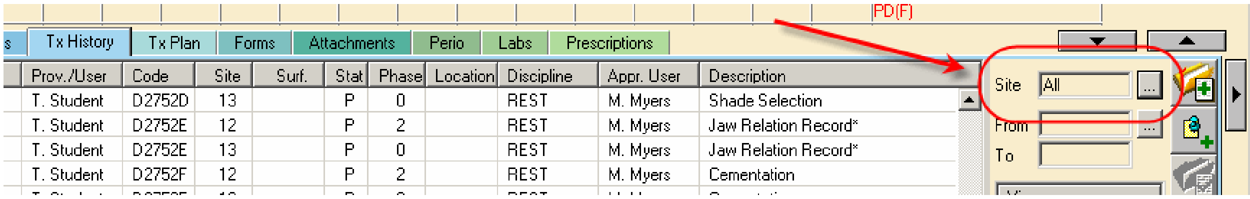
 view attachments (referral letter, medical release letters)

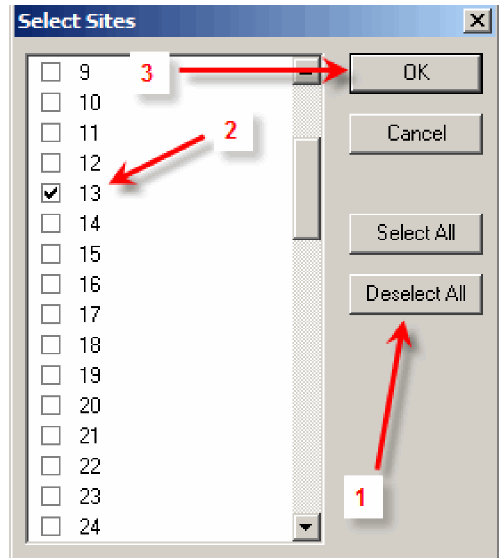
 print exam

 select perio display options

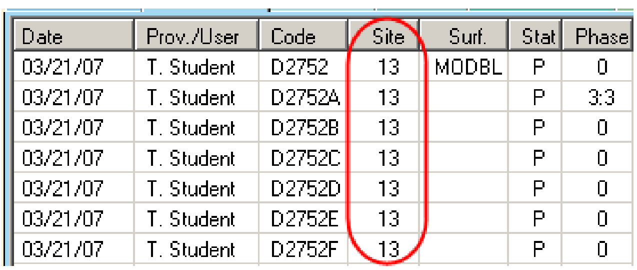
Kathy Hansel 504-941-8139/Room 2305

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

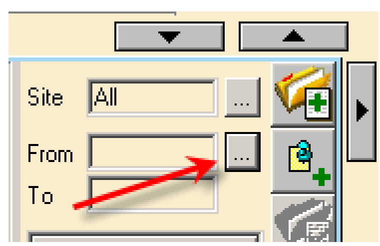


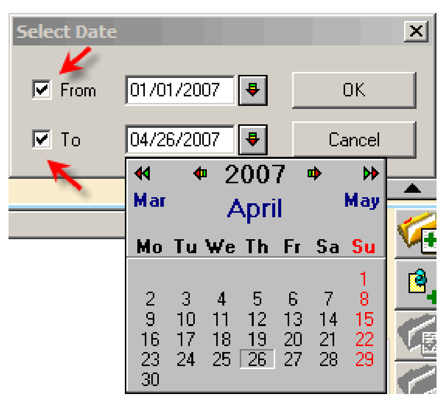
Date	Prov./User	Code	Site	Surf.	Stat	Phase
03/21/07	T. Student	D2752	13	MODBL	P	0
03/21/07	T. Student	D2752A	13		P	3:3
03/21/07	T. Student	D2752B	13		P	0
03/21/07	T. Student	D2752C	13		P	0
03/21/07	T. Student	D2752D	13		P	0
03/21/07	T. Student	D2752E	13		P	0
03/21/07	T. Student	D2752F	13		P	0

Exit EHR and return to restore default for displaying all treatment.

To View Treatment for a Specific Time Range

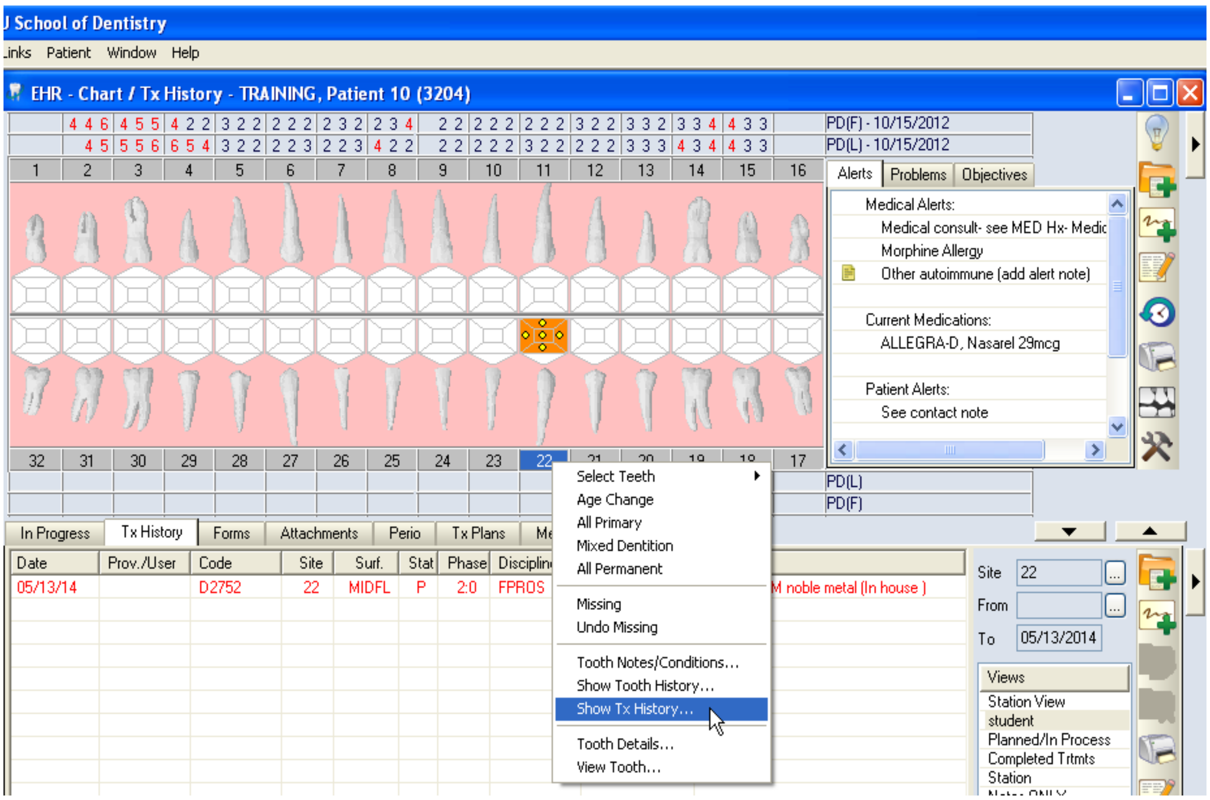
1. Select Patient
2. Open *EHR – Tx History* tab
3. Click on the ellipses button next to the *Date* data field
4. Check the fields you need to change
5. Change to the desired dates
6. Click OK
7. Only treatment for desired date range will display



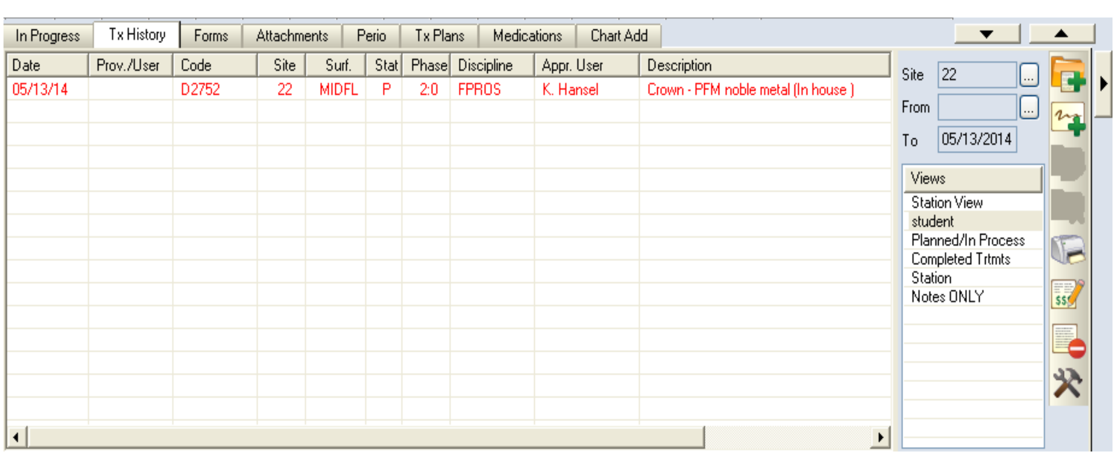


Exit EHR and return to restore default for displaying all treatment.

Filter treatment records in Tx History by tooth number in the odontogram
Select tooth # box in odontogram (turns blue when selected) - right click
Select the Show Tx History option



Axium filters the list view to display only those records (e.g. treatments, conditions, notes, etc.) for the selected tooth (see below).
To return to the original list view, go to the odontogram, deselect the tooth, and select the show Tx History right-click option again.



05/14

–

Adding Supernumerary Teeth to the Chart in axiUm

- If a supernumerary tooth has been treated, indicate the tooth site as follows:

Primary: add 'S' character behind the letter of the nearest adjacent tooth designation
(e.g., an extra tooth next to C would be CS).

Permanent: add 50+ the nearest adjacent tooth number
(e.g., an extra tooth next to 28 would become 78).

- To chart/add a supernumerary tooth as a **Finding** during an initial exam
-  -opens **Chart Add** tab- select **Findings** radio button

Procedure subtab- Existing Conditions Category-

Select **C4016 Supernumerary tooth** as a condition

Indicate the tooth site by adding 50 + nearest tooth #

Select **Add Finding** button  to **Save**

Messenger

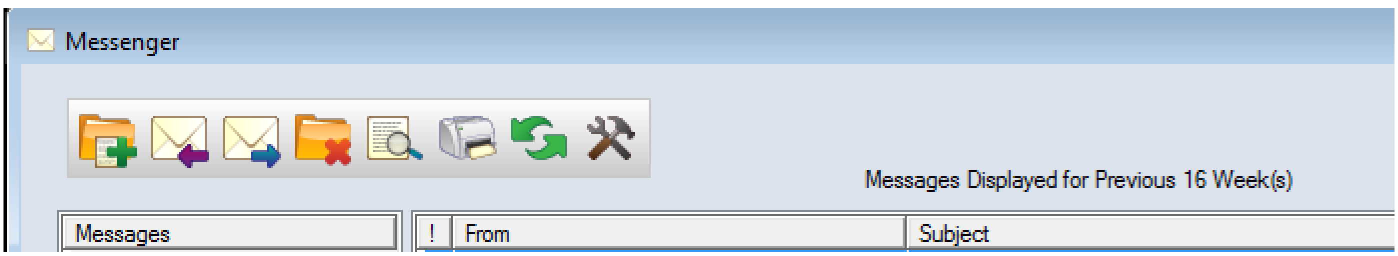
axiUm **Messenger** is used primarily for patient purposes.

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 noncontiguous 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 Patient s* tab. Click on Search button.

Revised 05/18

<u>Axium Cheat Sheet for Exit Exams</u>

When treatment is complete for a patient in the Undergraduate Student Clinic, an Exit Exam is done to verify that all dental treatment is in good condition. The patient is then released to private practice for regular dental maintenance.

Open the patient's chart in the **Rolodex**- Go to **EHR** module
On the right toolbar at the top half of the screen,

hit the "**Add Patient Form**" button 

1) **Select** from the drop down menu-
EXIT- Exit Exam Form

2) **Answer every question on the form that applies.** It's okay to leave questions unanswered if they don't apply for the patient, e.g. a denture patient with no operative treatment.

3) Select the appropriate code in the **Chart Add** tab-
0092 Exit exam passed OR
0093 Exit exam failed

0092 Exit exam passed (all questions answered Yes):

- Give the patient an **Exit Letter**- located at the front of clinic with other forms.
- Complete the **Patient Satisfaction Survey** with the patient-

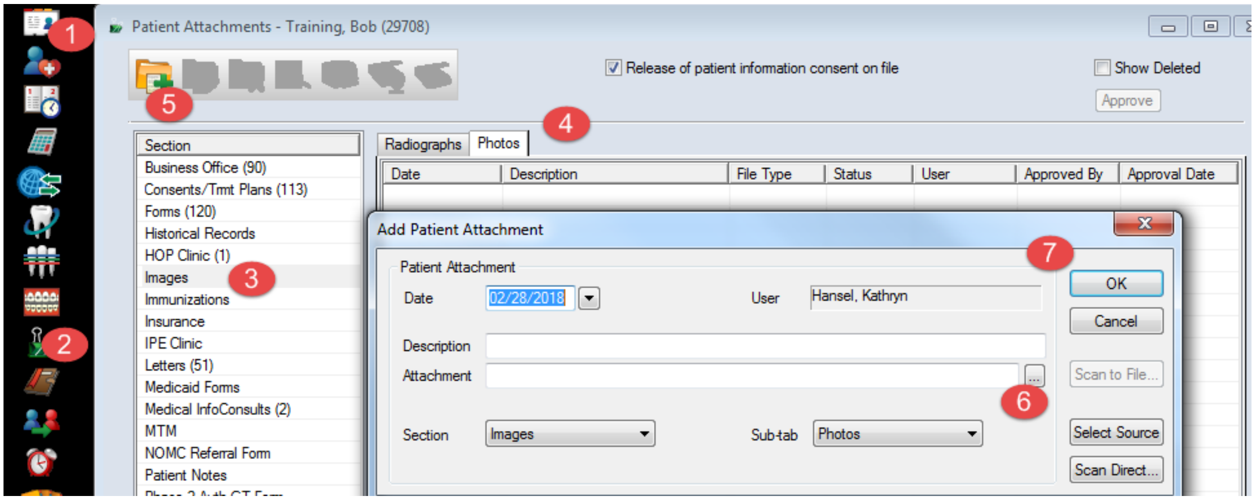
Go to **Tools** on the axiUm toolbar at the top of the screen- select **Survey-**
Survey window opens **(PS2) -** click on the answer box for Yes answers
Go to the next line for No answer to appear.
Hit **Close** when finished.
Most students ask the patient the questions and enter the answers in the survey for the patient.

0093 Exit exam failed (some treatment was not in satisfactory condition):

- the patient should be scheduled for the appropriate treatment and another Exit Exam will be done when the problems have been resolved.

Scanning photographs into a patient's chart in axiUm

First, save the photo that you want to attach on your desktop.



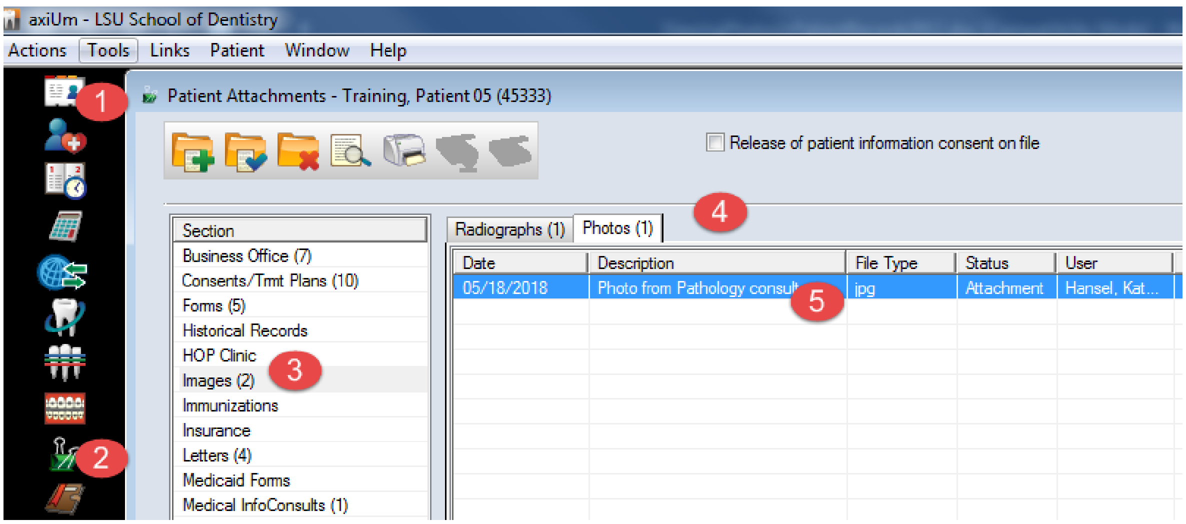
1- Open the patient's chart in the **Rolodex** (last name, first name – enter), select patient- name must appear in status bar at the bottom of the axiUm screen
2- Open the **Attachments** module
3- Go to **Images** in Section column
4- Go to the **Photos** tab
5- Hit the **Create new Record** button (green plus sign)to open the **Add Patient Attachment** window
6- Hit the **browse** button- ellipsis button with 3 dots- find the photo that you have already saved on your desktop- select it to attach
7- Add a description in the **Description** field and hit the **OK** button
8- You should see the name of the file listed now and you can double click on the file name to open and view it.

***Remove the saved file from the desktop when finished.

Viewing Photos/Radiographs in Patient's Chart in axiUm

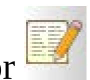
1- Open the patient's chart in the **Rolodex** (last name, first name – enter), select patient-name must appear in status bar at the bottom of the axiUm screen
2- Open the **Attachments** module
3- Select **Images** in **Section** column
4- Select **Photos** or **Radiographs** tab

5- Double click on the name of the file in the **Description** column to open and view the radiograph or photo



Undergraduate Medical Hold Process

<u>No appointments are to be made for a patient until this medical hold process is completed: The MCR has been returned, reviewed, approved for undergraduate clinic students, scanned into axiUm, and the chart unlocked.</u>

1. Medical hold forms (Medical Consultation Requests or MCR) are available to students *in the Forms tab of the EHR module in the patient's chart in* axiUm.  or  opens the Forms window- select MCR form.

2. The electronic form is completed (all pink lines are required). Hit the Calculate button at the bottom of the form to add the patient's information to the form.
3. **Faculty approves** the form.
4. **Patient signs** the form at the front desk.
5. **Form is printed and given to the patient.** There are 2 pages; the second page is the Physician's Response.
6. **Chart is locked** by the HATs.

7. **The Physician's Response** is faxed to the school or brought back to the school by the patient.
8. **The student** receives an Axium message from Akili. The student must arrange to meet with the faculty member who requested the medical consult to review and sign the Physician's Response. This can be done during clinic sessions. The MCR will not be released to the student until an appointment has been made with the faculty member to review it. **Do not appoint the patient on the same day that the MCR is reviewed with faculty because additional information may be required or faculty may not be present that day.**

9. Akili Johnson scans the approved and signed Physician's Response page of the MCR into the patient's axiUm chart in the Physician's Response tab of the MCR form and triggers an internal axiUm email to the student providers that the chart is unlocked. Paper copies of the MCR may now be destroyed or stored.
10. **<u>Students review the MCR with supervising clinical faculty and comply with its recommendations before treatment.</u>**

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. Findings
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 Dental Txs
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 Tx History
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

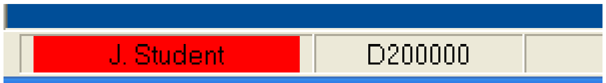
For **axiUm assistance**: Kathy Hansel 504.941.8139
Room 2305 khanse@lsuhsc.edu

Billing questions: Angela Jones 941.8138

Medicaid questions: Jeff Schluter 941.8183

FACULTY START CHECK

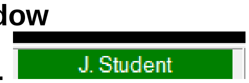
(Student must have an appointment entered for the patient in the Scheduler module.)
In lower left corner of axiUm screen:

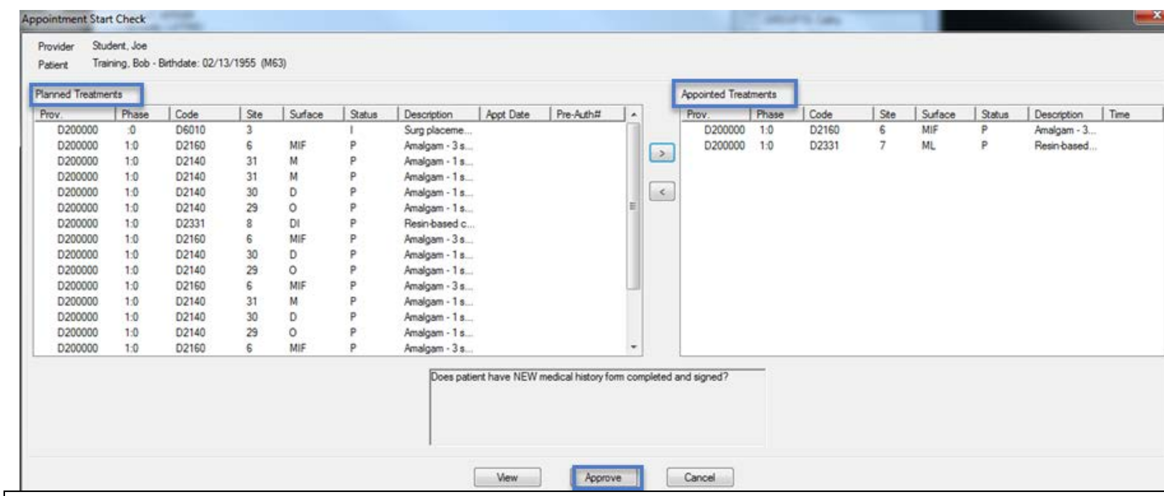


-  **Click on red student name button**

Appointment Start-Check window opens. **Planned treatments** for this patient are on the left, **Appointed Treatments** for today's visit are on the right.
Faculty can move a treatment from one side to the other with the arrow keys if they want to change the appointed treatments for that visit.

- **Hit Approve button at bottom of Start Check window**
- **Enter approval code in User Authentication window**

Student name button turns green once approved by faculty. 



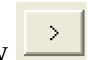
Red provider name indicates that a start check is required and is awaiting approval.
Green indicates that a start check has been approved.
Yellow indicates that a start check is required for an upcoming appointment that requires approval.

A symbol appears next to procedures approved in the Start Check in the Tx History tab in the EHR.

axiUm- Faculty- Step-by-Step

Start Check- (*patient must have appointment in Scheduler)*

1) click on **red student name button** 

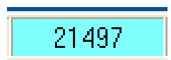
at lower left of screen
2) review **Appointed Treatments** on right side of window
3) **Appointed Treatments** can be added /changed by using arrow keys in the middle of the window 

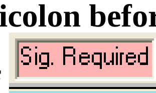
4) **enter approval code- (semicolon; - 4 character code- Enter)**
5) student name button turns green

At the end of the session – change the status of treatment from planned to in process or complete:

6) Go to **Tx History** tab - S**elect planned procedure- right click- select In Process Tx Visit or Complete Treatments**
Text will turn blue to indicate that it needs approval
If it is already in process (I status)- double click to update treatment date or select- right click and select Complete Treatment if completed that day.

******To approve treatment, treatment notes, forms or perio charts:**

7) **Approve** by hitting aqua chart number button 

8) **Review procedures to be approved**
9) **A Treatment Note** must be added for every patient visit before student leaves clinic, the note will display for approval
10) **enter approval code (; semicolon before and enter button after 4 character code)**
11) Is medical history signed? If 

button appears at bottom of med hx form, patient must sign at station with signing pad.
EPR forms or Perio Charts needing approval appear in a blue box at the bottom of the **Approvals** window.
12) **Grades**- Grading window displays- choose **Discipline & Form** from drop down box- **enter grades**
13) **Enter approval code again (semicolon; - 4 character code- Enter)**

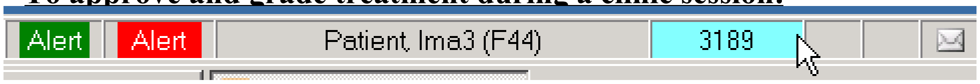
How do you know if the approval code worked?

- Chart number button will turn grey and text of procedure turns black when successfully approved
- Faculty approval must be given at every appointment- **a procedure (whether complete or in process) or treatment note must be entered in the chart for every patient visit and approved by faculty**
- Charges are not entered until procedure status is changed to Complete and Approved. Approval must be completed **before** bringing the patient to the cashier.

Can a grade be added after a clinic session when the chart number button is no longer aqua and the procedure is complete? Yes
Go to **Tx History tab**- select and right click on procedure needing grade- select **Add Student Eval-** *enter approval code to open grade form- choose discipline and grade form if one has not been started- -enter grades- enter approval code*

Adding or Editing Grade Forms in axiUm

- **To approve and grade treatment during a clinic session:**



On the Status bar, select the **chart number box** with an aqua blue background.
In the **Patient Approvals** window, planned or completed procedures are displayed.
Click **Approve.**
In the User Authentication window, **enter faculty approval code**.
From the **Discipline drop-down list**, choose the appropriate discipline.
From the **Form drop-down list,** choose the appropriate form.
In the **Add/Edit Evaluation** window, select a question ,select its corresponding Grade box, and enter a grade.
Continue grading for all general questions and treatment-specific questions
Click **OK.**
In the User Authentication window, **enter faculty approval code** and click OK.

Note: In axiUm, the first approval indicates you have approvd the student's completed treatment. The second approval represents your "signature" on the evaluation.

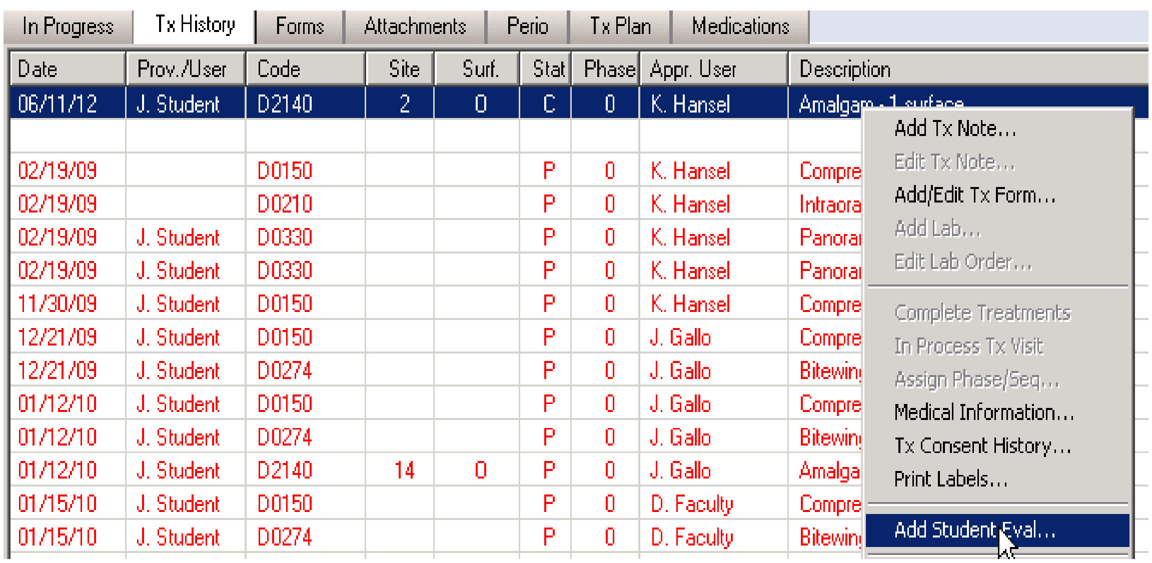
- **To Add or Edit a grade for treatment that was already approved:**

Open patient’s chart in Rolodex

Go to EHR  

tab-

Right click on completed and approved procedure and select – **Add Student Eval**

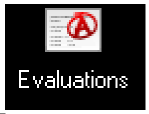


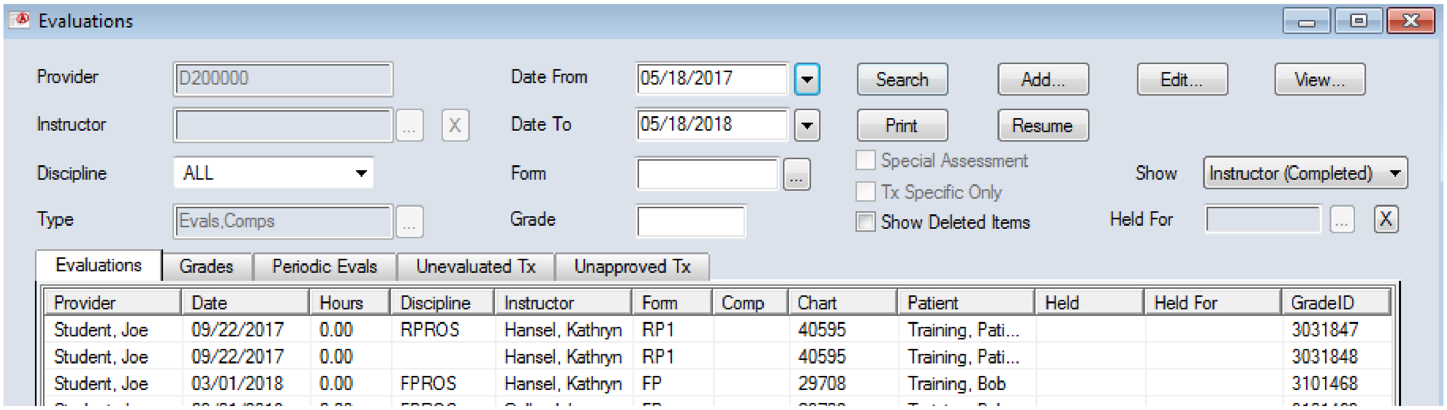
Date	Prov./User	Code	Site	Surf.	Stat	Phase	Appr. User	Description
06/11/12	J. Student	D2140	2	0	C	0	K. Hansel	Amalgam - 1 surface
02/19/09		D0150			P	0	K. Hansel	Compre
02/19/09		D0210			P	0	K. Hansel	Intraora
02/19/09	J. Student	D0330			P	0	K. Hansel	Panora
02/19/09	J. Student	D0330			P	0	K. Hansel	Panora
11/30/09	J. Student	D0150			P	0	K. Hansel	Compre
12/21/09	J. Student	D0150			P	0	J. Gallo	Compre
12/21/09	J. Student	D0274			P	0	J. Gallo	Bitewin
01/12/10	J. Student	D0150			P	0	J. Gallo	Compre
01/12/10	J. Student	D0274			P	0	J. Gallo	Bitewin
01/12/10	J. Student	D2140	14	0	P	0	J. Gallo	Amalga
01/15/10	J. Student	D0150			P	0	D. Faculty	Compre
01/15/10	J. Student	D0274			P	0	D. Faculty	Bitewin

Faculty must enter approval code to access grade form.

*See **Evaluations Module** fo rmore information on tracking grades fro students.*

Evaluations Module in axiUm





Evaluations Module -Evaluations tab- allows the user to search for grade forms.
Date Range- select Date From and Date To
Search- hit Search button to find grade forms with selected criteria
The search can be filtered by:
Discipline- use drop down list
Instructor – use browse button next to field to find name of instructor
Form- select a specific form by using the browse button next to Form field

Note: If you cannot find a grade form when searching by the discipline or form, search by date only. The form may not have had a discipline selected at the time of grading.

Select a grade form in the list:
Edit allows faculty to edit a grade form (faculty approval code needed to edit a grade form)
View allows the user to view a grade form

Grades Tab- allows the user to search for individual grades using the criteria listed above.

Unevaluated Tx Tab- allows the user to search for treatment that was not graded yet.

Unapproved Tx Tab- allows the user to search for unapproved treatments.

Tip: Click on a column heading to sort by that column name (Date, Form, etc.).