



AxiUm Flow Chart – Completing TX – Students (revised 11/2/06)

Assumes patient has visited at least once since axiUm implemented.

Patient reports to Admissions/Business Office first which checks demographic data and checks patient in. The patient then reports to your clinic.		
Student	 Electronic Health Record	Complete Health Questionnaire Click on Forms tab. Answer first question on <i>Health Questionnaire</i> . Add any reported changes. Click on Sig. Required , get patient signature, click OK. The Chart Number box at the bottom of the page will turn aqua indicating faculty approval is required but ignore it for now. Complete other required forms.
		Complete Tx Select TX carefully as you cannot undo competed TX Click on Tx History tab. (Can change <i>View</i> to <i>Planned/InProcess</i> .) Select a line of planned TX and double click. Move <i>Status</i> from <i>Planned</i> to <i>In Process</i> or <i>Complete</i> . Click OK. Some completions will trigger a recall box. If <i>In Process</i> or <i>Complete</i> is greyed out, see if the tx requires the tooth to be missing but the tooth is present. Requires faculty approval but ignore it for now.
		Add Note Click on Tx History , select a line of completed TX, right mouse click and choose <i>Add Tx Note</i> . For general note Click on  , click inside text box to place cursor, add comments, click on <i>Add New</i> . Your note will require faculty approval via the aqua chart number box. If you are done with your patient for the day, get faculty approval now.
Student and Faculty	Get Faculty Approvals If changes in fees are required, faculty must log in, pull up your patient, and change fees by clicking on Approve/Add Special	<ol style="list-style-type: none"> 1. Click on 1047 (chart # box, bottom of screen). Check Out Patient box will come up. Faculty will scan card to approve Tx edits. 2. If you have written any notes, they will pop up. Faculty will review note and scan their card. 3. If 1047 chart # box is still aqua, click on it again and click on Unapproved EPR answers. Your patient's <i>Health Questionnaire</i> (and any other forms you completed) will come up for faculty to review. Make sure faculty reviews every form you completed. Faculty will scan their card bringing up a <i>Form Approval</i> window. 4. If you completed more than one form, select <i>All Pages</i>. Faculty will scan their card. Close the EPR window. Close the <i>EPR</i> window and you are done with that patient.
Patient goes to the Business Office to complete billing and check out.		