Start Checks*
When students log on the user name field (lower left corner) will display in red. This indicates a start check is required. In order for the start check to display the patient must have an appointment scheduled in Axium.

- Click (or use the stylus to tap once) the name field and the Appointment Start-Check window displays. Faculty give their approving signature by swiping the planned treatment for the appt. The name field will turn green once the appt is approved.
- If the faculty does not approve what is appointed changes can be made to the planned work for the appt by moving from the Treatment Plan box to Today’s Treatment and back by highlighting the item and using the left or right arrow keys. Once the appropriate changes have been made the faculty can give their approving signature by swiping.
- Up to 30 minutes before the next appointment the name field will turn yellow (yellow indicates the next appt will require a start check but the current appt is on-going).
A start check can be performed at any time when the field is red or yellow.

Electronic Patient Record (EPR)
All of the following can reviewed through the Dental Chart.

Forms*
- If the Forms button is teal it means there are forms to be approved.
- Click the Forms button.
- The tab and the dates on the forms will display in blue font when the form needs to be reviewed and approved by faculty.
- Each patient could have multiple sets of forms. The field in the top center of the screen displays the current set of forms. Click the arrow to see additional form sets.
- Forms can be reviewed by using the scroll bar on the right of the form. Use the up arrow to expand to full screen.
- If the Sig Required box is teal the necessary signatures for the form have not been obtained. The student will need to correct this before form can be approved by faculty.
- Once all the forms have been reviewed faculty signature of approval can be given by swiping with the forms displayed (no need to go out of this screen to approve).
- A Forms Approval box opens which displays the current user/student.
- Select Current page or All Pages to approve the displayed form or all forms in this set.
- Swipe again if the forms are approved or click for changes/corrections to be made.

At the time of Checking out for the day's charges if there are Unapproved forms the message 'Unapproved EPR Answers' displays above the procedures.

**Consent Forms**
Consents can not be saved without the appropriate signatures. Use the stylus to sign the on-line forms. Students will require faculty signature on the following forms:
- Informed Consent ER Pulpal Therapy
- Informed Consent RCT
To review consent forms:
- Click the Attach button.
- Highlight Consents and click the appropriate tab (Financial, Sedation, etc.)
- You will be able to see the type of form on file, the date of the form, the user and the expiration date (if applicable).
- If you want to display the form double click on the form.
- Consent forms can be accessed from anywhere the binder clip icon displays.

**Progress Notes**
There should be one note per day attached to any of the day’s procedures. Notes do not have to be entered for each procedure. Notes can be reviewed in the patient history of the dental chart. Otherwise, notes will display in the check-out window after the day’s procedures have been approved with a swipe. Review the progress notes and swipe to provide a faculty approval signature. **Do not swipe progress notes in the dental chart** as it will change the user from the student to you so it looks like you entered and approved the note. **Progress notes should only be approved in the check-out window.**

**Entering Prescriptions**
Before a student can complete a prescription they must obtain a faculty signature
- The student will complete the prescription.
- When they click the OK button there is a prompt for the faculty approval.
- Swiping will provide the faculty signature for the prescription.
- Prescriptions cannot be modified. They can be voided using the second icon and reentered.
- A note will automatically be added to the history regarding the prescription.

**Entering Medical Alerts**
Medical Alerts are automatically set from Yes answers in the Medical History form. They can be reviewed through the dental chart.
- Click the red Alerts button along the bottom of the screen.
  - To review click the Edit button.
  - When medical alerts are entered for a patient a red alert displays along the bottom of the screen for that patient. Click red alert to go directly to medical alerts.

**X-Ray Exposures**
- Click X-rays button (options on odontogram)
- # of exposures is listed
- Additional exposures can be added as necessary.
**Perio Charting**
Perio charting does not need to be completed at one time. If a student does not complete the charting they can save what they have and complete at a later time. Once the charting is completed the student will request your signature for approval. Review the Perio charting and if it is appropriate the Complete button is clicked by the student or faculty and swiped. If not approving the student goes make the make changes/corrections per faculty instructions.

**Charting for EPR**
- Utilizing the Odontogram in Axium, all existing restorations must be charted.
- Variations of normal and observations that are not disease or likely to become disease, do not need to be charted.
- Observations from clinical examinations and radiographic tests indicating conditions that need treatment must be charted as conditions. Treatment includes caries prevention and restorative intervention.
- Notes can be made electronically for observations that may need treatment in the future.
- Conditions are charted electronically. As the treatment plan is developed all of the charted conditions are addressed with procedure or set of procedure codes. The planned procedures will have a specific diagnostic and prognostic code associated with them. As the treatment is performed, the procedure code with the diagnosis code and prognostic code is charged out.

**Treatment Planning**
Treatment planning is a separate module and used to set up/discuss treatment options with the patient, set up a detailed treatment plan and get faculty and patient approval for the treatment plan.
If the TP module has been used properly there should be no hatch marks on the odontogram.
You can also click the TP icon to quickly see if a treatment plan has been entered. Dates and descriptions list for TP’s on file.

Click Add new button and module opens on the first of 6 tabs.

**Tab 1 – List of Problems**
The following fields should be completed:
- description for the treatment plan
- patient’s chief concerns
- Clinic signs and symptoms
- Diagnosis (should be one sentence)

**Tab 2 – Treatment Options (broad categories for discussion with patient)**
Up to 3 options are entered here for review with the patient. Average fee amount are used for discussions purposes with the patient (e.g., cost of RPD vs. FPD). One option is then selected to be set up as a detailed treatment plan. Faculty approval is not required to move to the next tab.

**Tab 3 – Detailed Treatment Plan**
The detailed treatment plan is the entered the same as in the dental chart. Entries should include phase, sequence, diagnosis and prognosis. Use the scroll bar to review the entire plan. Step codes do not display in this screen but will carry over to the dental chart when the plan is approved. Day-to-day changes to the treatment plan can be handled in the dental chart. Otherwise treatment planning is handled through this module.
Once the treatment plan is entered either the student or faculty click Approvals for faculty signature. The student cannot continue without faculty approval signature by swiping. Close the window when finished. Approved! will then display above odonotogram.

**Tab 4 – Appointment Schedule**
This screen is used to set up a timetable for completion of the treatment plan.

**Tab 5 – Patient Approval**
Patient reviews the treatment plan and once approved (Accept/Print button) the treatment plan will be saved to the dental chart.

**Tab 6 – Notes/Recommendations**
Notes can be added as free form text

*Items requiring faculty approval signatures*