**Dental Schools**
AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe. A comprehensive package, AxiUm eliminates the need to have multiple software applications operating in different areas of your school by incorporating all of the features required into one software application using a single database. From patient management, to clinic and administrative management, AxiUm offers the solution.

**Dental Offices**
The commercial dental product was the first product to be introduced by Exan and today has over 2500 dentists using the software product (Power Practice Pro). Exan has also developed software for hospitals, medical practitioners, as well as leading edge software for veterinarians which is being marketed all over the world.
Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Staff, Scheduling (D3/D5) and Chart Locks

- The AxiUm Staff Scheduling Team
- Scheduling Form
- Patient Portfolio Help
- Record Locks

AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
**D3 and D5 Scenario**

D3 and D5 students will submit a written request and have their patients scheduled by staff schedulers.

**AxiUm Staff Scheduling Team (located at Dunn 4th Floor Lobby)**

Sherry Maley  
Jacqueline Chapman  
Tanya Brown  
Myra McGarrity – Randolph
Please **print** the information on your Scheduling Forms as clearly as possible. Also include as much detail as possible so the scheduler knows exactly what to schedule for you.

You are still ultimately responsible for managing your portfolio of patients and getting the completed procedures required for your graduation.

Use the **Staff Schedulers** as a resource to enhance your doctor-patient relationship. Keep the lines of communication open with your patient.

The forms will be available at the schedulers desk located on the 4th floor.

Students must turn in “completed form” to your assigned scheduler in order to make a patient appointment. Appointments will be made in the order that they are received.
Ardell Relliford and Debra Perry in the Clinical Affairs Office will assist you by updating patient assignments within the AxiUm program. Your Coordinator will also help you with your Portfolio.

You must present a Patient Assignment form that is signed by a faculty member, to add and/or remove a patient from your portfolio.

Patient’s must be in your portfolio before the schedulers can schedule an appointment for you (D3’s). D4 students schedule their own appointments.
Aish Davis, Shiretha Dabney and Susie Robinson located at the 2nd floor (G) Front Desk, will make a patient record for you when you are bringing in a new patient (who has not been seen for a special screening).

They may also assist you in keeping your patient’s address, telephone numbers and any DISCOUNTS they may be eligible for up-to-date. Front Desk also scan in ID’s, Insurance Cards and make a photo of each patient.

Records in the old Oracle system but not in the AxiUm system can be entered here. (The front desk staff will create a new chart and send an email to the AxiUm administrators to change the chart number to match the old Oracle system and the paper chart.)
Melisa Banks, Gloria Crews and the Mod Coordinators will assist you in managing your portfolio by mailing contact cards to your patients and setting the patient status to INACTIVE.

These functions can also be performed by the Mod Coordinators.
Record Locks

Record locks are designed to stop scheduling and treatment until the conditions that warrant the lock are resolved. **Unpaid balances, Unsigned Notices of Privacy, Insurance Authorization, Promissory Notes, Returned Checks and Will Call** are some of the most frequent reasons for locks.

If you are on campus, locks may be resolved or temporarily suspended by contacting designated staff. If you log in to AxiUm from off campus you will not be able to schedule a patient with a locked record.

A message box similar to the one below will be the first thing you will see if the chart is locked.
The **1COL** – Account Sent To Collections hold can only be removed by the **College of Dentistry Business Office** located on the 1st floor of the Dunn Building. Please see **Evelyn Conley** to remove this hold.

Evelyn Conley
The NPP – Notice of Privacy Practice record lock can only be removed by having the patient sign an electronic copy of the University of Tennessee’s Notice of Privacy Practices document.

The patient’s signature is required by federal law - HIPPA the Health Insurance Portability and Accountability Act of 1996.

The personnel at the 2nd Floor (G) Front Desk will collect your patient’s signature for you.

Aish Davis
Susie Robinson
Shirietha Dabney
The 2 NAMI–Nat’n’t Alliance Mentally Ill lock is an insurance hold. Patient insurance coverage must be verified.

Linda Ramat in the Clinical Affairs Office is the primary person who can remove this hold for you.

Remember

Off Campus: A locked chart CANNOT be scheduled.

On Campus: A staff member must remove the lock for you.
The PROM – Prom Note Signed record lock indicates that a patient did not pay fully for an emergency visit. Any unpaid balance must be paid before further treatment can be provided.

Linda Ramat is the primary person who can remove this lock for you.

Beckey Hawes, Dale Jackson, Bronte Christian, and Diane Weber in the Clinical Affairs Office, can remove this lock for you if Linda Ramat is not available.
Record Locks: 2Doral – Doral

The 2 DORAL-Doral record lock indicates that a patient has TENNCARE insurance. Coverage. This insurance must be verified each time the patient visits, prior to receiving services. This lock will reset after a period of time.

Linda Ramat in the Clinical Affairs Office is the primary person who checks for coverage. Beckey Hawes and Dale Jackson assist much of the time.

If you are scheduling or need to look at a Doral Patient chart - Ardell Relliford, Debra Perry, Bronte Christian, Dale Jackson should be contacted first.

Effective Spring of ’09 Doral Patients can be scheduled from home during the evening hours.
The BALOD – A/R> 90 days record hold indicates that the patient has an overdue balance. Dale Jackson, Diane Weber, Linda Ramat or Beckey Hawes in the Clinical Affairs Offices will assist you with these locks.

Note: If you need to make sure a patient is NOT billed for REDO work, you must enter a note in the EHR and have it swiped by a FACULTY member. Then send Diane Weber or Dale Jackson a AxiUm messenger e-mail with the patient chart number and what procedure needs to be at NO CHARGE.
The **1RTC – Returned Check** record lock indicates that a patient’s check has been returned unpaid.

**Evelyn Conley** in the **Business Office Rm C102 - 1st floor** – will assist you in the removal of this lock.

**Remember**

**Off Campus**: A locked chart CANNOT be scheduled.

**On Campus**: A staff member must remove the lock for you.

---

**Electronic Chart Lock Warning - Test, Test25 (5048195)**

The patient’s record is locked because of the following conditions:

**Patient has office code 1RTC – Returned check**

No treatment can be completed for this patient until the above conditions(s) are resolved.

Do you wish to continue?

No
Record Locks: WCM – Will Call Pending Med Consult

The WCM – Will Call Pending Med Consult lock indicates that a request has been sent but not returned for a medical consult.

Sherrill Cole in the Oral Diagnosis Dept. and MOD Coordinators will assist you in removing this lock.

Sherrill Cole

MOD Coordinators

No treatment can be completed for this patient until the above conditions(s) are resolved.

Do you wish to continue?

No
<table>
<thead>
<tr>
<th>Money Issues</th>
<th>Overdue Balance Locks</th>
<th>Ms. Bronte Christian, Ms. Beckey Hawes, Mr. Dale Jackson, Ms. Diane Weber, Ms. Linda Ramat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Insurance Locks</td>
<td>Ms. Linda Ramat, Ms. Beckey Hawes</td>
</tr>
<tr>
<td></td>
<td>Pricing and/or Rebilling Issues</td>
<td>Mr. Dale Jackson, Ms. Linda Ramat, Ms. Diane Weber</td>
</tr>
<tr>
<td></td>
<td>Promissory Notes:</td>
<td>Ms. Beckey Hawes, Ms. Linda Ramat, Ms. Diane Weber</td>
</tr>
<tr>
<td></td>
<td>(Patient does not have enough funds to pay for Emergency dental work)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collections Holds</td>
<td>Ms. Evelyn Conley</td>
</tr>
<tr>
<td>Patient Port Issues</td>
<td>Adding and Deleting Patients from D3 and D4 student ports</td>
<td>Group Coordinators, Ms. Debra Perry, Ms. Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Adding Department Permissions from D3 and D4 student ports</td>
<td>Group Coordinators, Ms. Debra Perry, Ms. Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Will-calls, inactivates and case completes.</td>
<td>Group Coordinators, Ms. Gloria Crews, Ms. Melissa Banks</td>
</tr>
<tr>
<td>Medical Consult Locks</td>
<td>Will Call Pending Medical Consult</td>
<td>Ms. Sherrill Cole</td>
</tr>
<tr>
<td>Reports</td>
<td>New Requests and to report problems with existing reports.</td>
<td>Mr. Frank Pancratz</td>
</tr>
<tr>
<td>Oracle Record Not In AxiUm</td>
<td>Have Front Desk create NEW record with Chart ID beginning with and “S” (Send Mr. Frank Pancratz and e-mail to set the correct Chart ID.</td>
<td>See Front Desk to create the “S” record.</td>
</tr>
</tbody>
</table>
Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Using Your Personal Planner

- Viewing Appointments
- Scheduling Appointments
- Rescheduling Appointments
- Logging Out of AxiUm

AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
AxiUm Training: Using Your Personal Planner

Log onto AxiUm and select your “Personal Planner”
Select the “Appointments” tab
Select the down arrow beside the “Date To”
AxiUm Training: Using Your Personal Planner

Select the Month
AxiUm Training: Using Your Personal Planner

In this instance December
Select the Date
- the 31st
Select the “Looking Glass” icon
Data can be sorted by clicking on the column header.
Here it is sorted by last name.
**D4 Students** schedule their own patients by using the **AxiUm Scheduling** module.

Note: **D3’s** do not have access to the Scheduling module until October 1, 2010. Until then patients are scheduled by the staff schedulers.
Select the “Scheduler Module”.

Revised 7/1/10dj
Advance to the date on which you wish to make an appointment. Click the green Date (shown as Jul 08, 2010) to bring up the calendar. This is Chair Mode.
If you need to change clinics, right-click anywhere in the tan area or select \(\text{Select Clinic}\). A gray box will appear, then choose “Select Clinic”.
Scroll and select the clinic by double clicking on it.
If you need a PM reservation click on 12:00p.
A single click on a white box (Chair) will “reserve” an open Chair. The Chair will turn green on your screen. Right clicking will allow partial reserving.
Click on the “Active” tab to schedule the appointment
Click next to the desired appointment time and the “Patient Rolodex” box will appear.
Double-Click on the patient name
The “New Appointment” screen will appear. Select the Appt Code and the length of your appt.
Next – Select the “TX Discipline” from the drop-down menu.
Select the Discipline.
For this demo Appt. Status will remain “TXPLAN”. Select the Treatment Plan button.
1. Select the procedures to be started and/or completed during the appointment. Multiple treatments may be selected by holding the control key and clicking on each.

2. To associate the selected procedures with the appointment, select the “>” button. To move from the Appointed Treatments back to Planned highlight the treatment and select “<“

3. After moving planned procedures to the Appointed Treatments select the close button.
Make a brief note in the Reasons window so that the staff can quickly see the reason for the appt. if the patient calls. Also use this window to note if the patient cancels, is late or is a no-show.
After a review and closing the New Appointment window, the appointment will show in green as below.
To Reschedule the appointment, your Chair reservation **must** be canceled. This allows other students to use the chair.
To Avoid getting –” Appointments are scheduled for this chair. Cannot unreserve chair.” you are required to remove the appointment.
Select the “Active” tab.
Right-click on the actual appointment (anywhere in the white area) to bring up a menu with the “Reschedule” option.
Select “Reschedule”
Once the box turns yellow it is floating and can be moved using your pointer.

Next - Click on the Chair tab to show your reserved chair.
IMPORTANT:
You must UNRESERVE your chair by clicking on the green square. This frees the chair for other students to use.
Once you have unreserved the chair use the date buttons at the bottom of your screen to navigate to the date you plan to reschedule your appointment for.
Click on a chair without a reservation (white square).
Click “OK” if you receive the notification above then click in the chair box a 2nd time to turn it.
Select the Active tab.
Move the floating yellow\green appointment to a open time slot and double-click on it.
After “locking” your time – right-click on your appointment and select confirm.
The blue text on white indicates your appointment is scheduled.
Phantom Booking! 

Phantom Booking is reserving a chair in one patient’s name in order to have it available to use with another patient. This is against policy. If you are found to participate in any form of Phantom Booking you will lose your AxiUm privileges and be suspended from Clinic.
To view your appointments, once again open your “Personal Planner” and select the “Appointments” tab.
After selection of the “Appointments” tab click on the “Spy Glass”.

To Search for a date range use the drop down arrows to select month and year then once again select the “Spy Glass”.

AxiUm Training: Using Your Personal Planner

Revised 7/1/10 dj
AxiUm Training: Using Your Personal Planner

Your list of appointments will look similar to this.
Highlighting an active appointment and right-clicking “Show History” brings up details of your appointments.
Your patients Appointment History view.
Always exit from AxiUm when you are finished using it. This cuts down on the chances another student will inadvertently enter information on another patient in your name. Most importantly it is a HIPPA regulation that all information entered be by the logged in user. Use either the “Exit” menu or click on the “X” at the top of your screen.
Click the “Yes” to continue your exit!

This concludes
AxiUm Training: Using Your Personal Planner.
Welcome to the University of Tennessee Health Science Center College of Dentistry

AxiUm Training: Logging In From Off Campus

Due to HIPPA privacy restrictions, only a limited amount of information is accessible from off campus locations.

- Remote Desktop
- Limitations
- Scheduling
- AxiUm Administrators

AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
Important
VPN Software

You must download, install and have running UT’s VPN software before you can setup remote desktop. Remote desktop with the correct settings will allow you to use AxiUm from your personal computer. For VPN software and instructions go to http://www.uthsc.edu/comp/ITSecurity/downloads.html

After installation and testing the VPN software return to these instructions to set up your remote desktop.
Windows Users: Using the Internet you will connect to the University of TN College of Dentistry – AxiUm server through REMOTE TERMINAL connection software.

Mac Users: Remote Terminal will require the same login information.
To install your **Remote Desktop** go to **Start** – **Programs** – **Accessories** – **Communications** – **Remote Desktop**. Right-Click on **Remote Desktop** then go to **Send To** – **Desktop (create shortcut)** and click on it. After placing the shortcut on your desktop click anywhere on your desktop.
The **Remote Desktop Connection** will now be on your desktop. The icon will look like this. Double-Click on it.

In the **Remote Desktop Connection** window use – “dentists.uthsc.edu” as shown below or “132.192.101.87 “ of you prefer.
After entering your **Net ID**, **Password** and checking that “Log on to:” = “UTHSC” select “OK” to connect. Connect will take a few moments.
The first time you log in you will be presented with a login and pass code box. The login is “install” and the pass code is “axium” - all lowercase.

Allow some time for the servers to verify your identity then you will need to close out of the remote session, allow a minute or so before starting a new remote session, then log back in. You will only be required to use your Net ID and Password from that point on.
From off-campus AxiUm use is limited to the **Scheduler** and **Personal Planner** modules.
The **Scheduler** and **Personal Planner** modules work exactly the same as if you were On Campus.

To make an appointment you are first required to reserve a **Chair**.

Then you schedule the appointment.
Select the Chair Tab (1.), go to the day of the appointment (2.), AM or PM (3.) and click on the Chair to reserve it (4.), then click on the Active tab(5). See the AxiUm Training: Using Your Personal Planner for detailed instructions.
Now that you have your Chair, and have clicked on the Active tab, click on the tan field for the time you wish to schedule your appointment.
Remember

With the exception of Doral Locks you can not schedule patients with locked charts during the evening while off campus.
Phantom Booking is reserving a chair in one patient’s name in order to have it available to use with another patient. This is against policy. If you are found to participate in any form of Phantom Booking you will lose your AxiUm privileges and be suspended from Clinic.
Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Info Manager

- All Patients Assigned Report

AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
Click the **Info. Manager** icon located in the lower left corner of your AxiUm desktop. The **Info. Manager** window will appear.

Click on the “**Custom**” (green) tab. Under Category, select **Patients Assigned (User)**.

<table>
<thead>
<tr>
<th>Category</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad Student Reports</td>
<td>Competency Exam (User)</td>
</tr>
<tr>
<td></td>
<td>Patients Assigned (User)</td>
</tr>
<tr>
<td></td>
<td>Points (Self-Service)</td>
</tr>
<tr>
<td></td>
<td>Current Patients (User)</td>
</tr>
<tr>
<td></td>
<td>Transaction Verification</td>
</tr>
<tr>
<td></td>
<td>Treatmen Plan (User)</td>
</tr>
<tr>
<td></td>
<td>PEDO Procedures (User)</td>
</tr>
<tr>
<td></td>
<td>Perio Recalls (User)</td>
</tr>
<tr>
<td></td>
<td>30+ Days Since Seen (User)</td>
</tr>
<tr>
<td></td>
<td>Completed Cases (User)</td>
</tr>
<tr>
<td></td>
<td>PEDO Recalls (User)</td>
</tr>
<tr>
<td></td>
<td>Patient Balances (User)</td>
</tr>
</tbody>
</table>

Revised 7/1/10dj
Click Print.
The All Patients Assigned Report will appear.
Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Start-Checks

- Start Check Form Use
- Making Changes After Approval
- Appointments with no Planned Treatments.

AxiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
The following scenario for Start Checks assumes that your patient has a scheduled appointment.

In the EHR Click on the “Forms” tab -> “Add EPR Form -> Start Check.
Complete the Start Check form as appropriate for the patient and procedure to be performed today. If there is a change in the patient’s medical history, be sure to update that medical history and any other necessary information.

When the form is complete your instructor will review the information and approve it.

<table>
<thead>
<tr>
<th>Form Question</th>
<th>Answer</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Today's Information</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Today's Blood Pressure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pulse rate and rhythm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason for today's visit or diagnosis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposed treatment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is this a clinical exam?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the patient’s medical history changed since the last visit?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are there any changes in medications; e.g. new or no longer taking?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Today's oral hygiene status, if appropriate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient understands diagnosis and proposed treatment for today's procedure</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Prophylactic Antibiotics</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does the patient require prophylactic antibiotics for dental care?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dose</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time taken</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Local Anaesthetic</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local anaesthetic to be used?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of cartridges requested?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comment: [ ]
AxiUm Training: Start-Checks

The colors you see around your name at the bottom of the AxiUm screen indicates the status of the Start Check.

- **Red** indicates that a Start Check is required and is awaiting approval.

- **Yellow** indicates that a Start Check is required for an upcoming appointment that requires faculty approval.

- **Green** indicates that the Start Check has been approved.
Clicking on the red (or yellow) field brings up the Appointment Start-Check dialog. Treatments associated with the appointment will be displayed on the right side of the window.

You and your instructor will review the scheduled procedure(s) for the appointment. If the ‘Appointed Treatment’ (Today’s Treatment) is OK, the faculty will swipe approval.
If the treatment is not appropriate for the patient at this time, highlight the treatment. Then click on the arrow pointing to your left to move the treatment to the left side.

Click on (highlight) the “correct” treatment and move it to the right by clicking on the arrow pointing to the right. Perform approval.

The Start Check “green light” is achieved when the instructor swipes their ID card.

When the user clicks on “View” in the new Start Check dialog, a Crystal report that outlines today’s treatments and planned treatments is opened for review.
Making Changes after a Start Check

The faculty member doing the Start Check of the appointment will look at the list of procedures, make changes as needed, and approve the items as ‘good to start’. If anything changes after this start check has been done, for example an additional treatment is performed, the system will generate the message: “Items were not start checked do you wish to proceed?” when the Check Out Patient dialog is opened. This can be avoided if the new treatment is attached to the appointment. The student can attach this treatment to the appointment by highlighting, then right clicking on the appointment record in the ERH and selecting the “Appointment Treatments” menu item.

Once this is done the faculty member will conduct another start check approval for the appointment. Alternatively, the faculty user can bypass the “Treatment(s) were not start checked…” message and approve the work. This is allowed because sometimes on the clinic floor procedure code changes are approved verbally.
Using Start Check for an Appointment with no Planned Treatments

Scenario: The patient was appointed with no planned treatment (a first visit). At the start of the appointment a comprehensive oral evaluation was added as planned and approved treatment. The student's name in the status bar is red and is clicked. The Appointment Start Check dialog box displays and the Oral Eval procedure is moved from the left side (planned procedure) to the right side (appointed procedure).

Synopsis: AxiUm allows the user to attach and start-check the treatment at the time of the appointment. When the start check dialog is opened move the procedure to the right (appointed) side and swipe to approve.
University of Tennessee, College of Dentistry
Active Patients 30 Days or More Since Last Visit
as of June 30, 2008

**Walsh, Joe** (D-4, Mod 09  Dr. Gregory )

| Assemi, Sileshi (D-4, Group 09) | 26 Patients in Port | 26 Not Seen Last 30 days |

**DIRECTIONS:**
The "Planned Action" can be any of the following:
2. Initiate inactivation process because ____________________________.
3. Change status from 'ACTIVE' to 'CASE COMPLETE' .
4. Change status from 'ACTIVE' to 'RECALL'.
Please DO NOT use the WILL CALL status as this has been seriously abused in the past. (Per Dr. Patters)

**NOTE:**
Axium tracks "last day seen" as the date the last ADA procedure code was put In-Process or Complete. You may have seen a patient and placed a notation in the record, but the computer cannot tell if your note is a visit or a no-show entry. Please mark these occurrences as "Seen/No Action Needed".

<table>
<thead>
<tr>
<th>Chart</th>
<th>Patient</th>
<th>Last Visit</th>
<th>Days Since Last Visit</th>
<th>Days Since Assigned</th>
<th>Why Not Seen?</th>
<th>Planned Action?</th>
</tr>
</thead>
<tbody>
<tr>
<td>192327</td>
<td>Tyler, Tim</td>
<td>01/25/2007</td>
<td>522</td>
<td>01/08/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>213666</td>
<td>Slick, Grace</td>
<td>01/16/2008</td>
<td>166</td>
<td>05/17/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>125354</td>
<td>Me, Mini</td>
<td>03/05/2008</td>
<td>117</td>
<td>09/20/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>337844</td>
<td>Jones, George</td>
<td>05/01/2008</td>
<td>60</td>
<td>10/15/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>215744</td>
<td>Kildman, Nicole</td>
<td>03/26/2008</td>
<td>96</td>
<td>09/25/2007</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AxiUm Training: Student Unpaid Balances

Date: Monday, June 30, 2008
From: Dr. Lloyd George, Associate Dean for Clinical Affairs
Subject: patient payments for services
To: Gravely, Howard (D-4, Mod 09)

The following is the policy for patient payments and student responsibility for those patient payments for all services rendered in UT dental clinics. This is quoted directly from the Clinic Manual and will be enforced.

"STUDENT DOCTOR/PATIENT FINANCIAL RELATIONSHIP"

Patients are required to pay in advance for all services provided. While in some instances, a partial payment is accepted (ex. FDP, RPD), the complete payment must be made before delivery of the appliance.

Student doctors are not to pay for services rendered to patients nor are they allowed to accept compensation from the patient. However, should the student doctor fail to collect the appropriate fees from the patient, he/she will be held responsible for reimbursing the College for the amount(s) not collected.

Below are the patient accounts in which monies are owed for treatment services as of June 30, 2008. It is recommended that you obtain payments from the patients to bring their accounts up to date and that no additional treatment be provided until the account balances are acceptable to the Business Office.

If the patient paid and the payments are in the Oracle program, i.e. paid before the conversion to axiUm, please let Frank or Diane know.

If there are errors and corrections need to be made, you must bring written evidence of to me for approval.

You will be held responsible for these amounts owing to the University.

<table>
<thead>
<tr>
<th>Patient</th>
<th>228206 - Lucas, George</th>
<th>Home: (901)231-2312, Work:( ), Other: (901)321-2383</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Reference</td>
<td>Description</td>
</tr>
<tr>
<td>05/28/2008</td>
<td>179407-1</td>
<td>D4341 -Scaling/chinig 4 or more</td>
</tr>
<tr>
<td>10/10/2007</td>
<td>116134-1</td>
<td>D0140 -Limited oral eval-prob focused</td>
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<td>10/10/2007</td>
<td>116134-2</td>
<td>D0330 -Panoramic radiograph</td>
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Subtotal Patient 209518

$30.00
**AxiUm Training: Weekly In-Process Items**

**University of Tennessee, College of Dentistry**

**MC Weekly In-Process Items for**

**John Doe**  (D-4, Group 01 Dr. Ross)

**Directions:**
Please contact your instructors and have them swipe as Complete any item that shows as In-Process that is truely completed.
This is **very** important because In-Process items cannot be submitted to insurance companies for payment/reimbursement and insurance payments are time sensitive and could result in money lost to patients and the university. Every In-Process transaction (shown below) must be individually addressed PRIOR to transfer to another student or for graduation purposes. Please take care of this as soon as possible.

<table>
<thead>
<tr>
<th>Code</th>
<th>Code</th>
<th>Description</th>
<th>Date</th>
<th>Code</th>
<th>Code</th>
<th>Description</th>
<th>Date</th>
<th>Code</th>
<th>Code</th>
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<th>Date</th>
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<tbody>
<tr>
<td>ENDO</td>
<td>33446</td>
<td>Adams, Jane</td>
<td>11/16/2007</td>
<td>D3320</td>
<td>Endo therapy - bicuspid 4</td>
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<td>OPER</td>
<td>228000</td>
<td>Adams, Jane</td>
<td>01/22/2007</td>
<td>D2150</td>
<td>Amalgam - 2 surfaces 20 MO</td>
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<td>PERIO</td>
<td>334676</td>
<td>Adams, Jane</td>
<td>08/20/2007</td>
<td>D1110</td>
<td>Prophy - adult FM</td>
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<td>RPROS</td>
<td>208421</td>
<td>Adams, Jane</td>
<td>12/06/2007</td>
<td>D5820</td>
<td>Int. partial denture Max. UA</td>
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<td>191672</td>
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<td>12/12/2007</td>
<td>D5211</td>
<td>Max. part denture - resin base UA</td>
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<td>191672</td>
<td>Adams, Jane</td>
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<td>D5214</td>
<td>Mand partial -cast metal frame LA</td>
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Revised 7/1/10dj
AxiUm Training: Weekly Unapproved Items

University of Tennessee, College of Dentistry
MC Weekly Unapproved Items for
Doe, Jane (D-4, Mod 01 Dr. Ross)

Directions:
The items displayed on this report were not approved (swiped) by a faculty member. Please contact the appropriate faculty member and have them approve these items. This must be taken care of as-soon-as-possible. Access permission on these charts is current.

<table>
<thead>
<tr>
<th>Chart</th>
<th>Pt Name</th>
<th>TxDate</th>
<th>Code</th>
<th>Site</th>
<th>Surface</th>
<th>Description</th>
<th>Status</th>
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<tbody>
<tr>
<td>334676</td>
<td>Peck, Gregory</td>
<td>03/26/2007</td>
<td>EPR</td>
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<td>336515</td>
<td>Peck, Gregory</td>
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<td>PERIO</td>
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<td>Perio Electronic Record</td>
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<td>333495</td>
<td>Peck, Gregory</td>
<td>12/07/2007</td>
<td>EPR</td>
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<td>Electronic Patient Record</td>
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<td>334014</td>
<td>Peck, Gregory</td>
<td>01/03/2008</td>
<td>START</td>
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<td>Starting Check</td>
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<td>337987</td>
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<td>10/25/2007</td>
<td>D4110</td>
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<td>Perio Eval (Work Up)</td>
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<td>334468</td>
<td>Peck, Gregory</td>
<td>12/14/2007</td>
<td>D3320</td>
<td>4</td>
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<td>Endo therapy - bicuspid</td>
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<tr>
<td>Form Question</td>
<td>Answer</td>
<td>Date</td>
<td></td>
<td></td>
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<tr>
<td>------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>The agreed upon treatment has been completed (including all consultations)</td>
<td>Yes</td>
<td>07/06/2008</td>
<td></td>
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<tr>
<td>Sequence of treatment was appropriate to meet the patient's needs.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Bleeding on probing was observed in less than 10% of the sites probed.</td>
<td>Yes</td>
<td>07/06/2008</td>
<td></td>
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</tr>
<tr>
<td>Pocket depths are appropriate for this patient and can be maintained in periodontal health.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Soft tissues adjacent to teeth are free of mechanical irritation.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Extraction or surgical sites have healed properly.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>No sinus tracts are present.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Endodontically treated teeth are comfortable and exhibit no pathology.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Access preparation of endodontically treated teeth are sealed with permanent restoration.</td>
<td>Yes</td>
<td>07/06/2008</td>
<td></td>
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<tr>
<td>Dentition is free of recurrent or new caries.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>No pathology is associated with treated teeth.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Restored teeth demonstrate adequate marginal integrity.</td>
<td>Yes</td>
<td>07/06/2008</td>
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</tr>
<tr>
<td>Treated teeth were restored to proper form, function and aesthetics.</td>
<td>Yes</td>
<td>07/06/2008</td>
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</tr>
<tr>
<td>Contours of treated teeth are continuous with existing anatomic form.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Interproximal contacts of restored teeth were properly established.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>RPD framework fits properly.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Denture has acceptable function and esthetics.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>Tissue adjacent to RPD or denture is free of pathology.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<tr>
<td>No direct restorations done in the past year need to be replaced.</td>
<td>Yes</td>
<td>07/06/2008</td>
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<td>No indirect restorations done in the past two years need to be replaced.</td>
<td>Yes</td>
<td>07/06/2008</td>
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</tr>
</tbody>
</table>

| No removable appliances done in the past year need to be replaced.         | Yes    |          |