



New patient calls to make an appointment. Patient information is gathered, a chart and an appointment is made. The patient's status will be **Screening**. The **patient's type** will default to the Billing practice that makes the patient's chart.

To change the patient's status click on the patient's card to open up the patient info screen. The status is found under the Personal tab.

Patient Info - Test, Charting

Personal | Codes | Clinical | Guarantor | Employer | Insurance

Name
Title: Mrs. | Last: Test | First: Charting | Middle: | Preferred: Charting | Chart: S064642 Fixed

Personal
Sex: Female | Birth: 11/12/1955 | ID: 408999999 | Marital: Married | Status: SCREEN | End Date: [dropdown]

Status
 Patient
 Emergency
 Special Needs
 Policy Holder
Student: No

Home Address
Address: 875 Union Ave
City: University of Tn | Zip: 38163 | Country: [dropdown]

Telephone
Home#: 901 448-5871
Work#: | |
Other#: | |
Other Loc.:

Cont: H W O
Time: WC

EMER/U
GFILE
GPRG
HOSP
INACT
NOSUIT
ORTHO
PH
RECALL
REPRDS
SCREEN
SRTA
TBA
TEMP
WC

Emergency/Urgent Treatment
DO NOT USE
Grad Program
Hospital
Inactive
DO NOT USE
DO NOT USE
DO NOT USE
DO NOT USE
Patient on recall
DO NOT USE
Screening
SRTA Only Patient
DO NOT USE
Temporary Access to chart
DO NOT USE

First, let's discuss the patient's status. If a patient is accepted into the clinic the status needs to be changed from Screening. The following guide lines should be followed:

Patient	ACTIVE	Active Patient	Undergrad, AEGD or UDP
Patient	ACT_UN	DO NOT USE	
Patient	DEC	Deceased	All Clinics
Patient	DHYG	Dental Hygiene Patient Only	Dental Hyg
Patient	EMER/U	Emergency/Urgent Treatment	ER
Patient	GFILE	DO NOT USE	
Patient	GPRG	Grad Program	Any Grad Prog
Patient	HOSP	Hospital	Pedo or Oral Surg Hospital
Patient	INACT	Inactive	All Clinics
Patient	NOSUIT	DO NOT USE	
Patient	ORTHO	DO NOT USE	
Patient	PH	DO NOT USE	
Patient	RECALL	Patient on recall	Hyg, Undergrad, Perio
Patient	REPROS	DO NOT USE	
Patient	SCREEN	Screening	All Clinics
Patient	SRTA	SRTA Only Patient	SRTA only
Patient	TBA	DO NOT USE	
Patient	TEMP	Temporary Access to chart	Used by Admin
Patient	WC	DO NOT USE	

So now you ask....What happens when a patient is seen in a different clinic such as Undergrad to Grad? Several options can be chosen. These guide lines should help:

Patient Status – Screening; Patient Type – Undergrad

The OD faculty during Screening will determine if a patient is a good Undergrad teaching case. If they are the patient status will be changed to Active. If not the patient may be referred to a Grad department, UDP, AEGD or dismissed. If the referred department accepts the patient the patient status will change to Grad – for Grad departments or to Active – for UDP or AEGD. The patient type will need to be updated as well. This will be discussed later. If the referred department cannot accept the patient, the chart should be Inactivated. All of this should be

documented in the note area of the patient's card. Click on the note icon  at the top of the patient's card and type in your documentation.

Contact Note

Date Time User

Code ...

Note

After the note has been entered, click the add button 

Patient Status – Active; Patient Type – Undergrad

Referred to a Grad clinic and/or UDP, AEGD for one or more procedures. The patient will stay in an Active status as long as most of the work will be done in the Undergrad clinic and the Grad clinic being used is seen as a referral for one or more procedures such as Implants or Wisdom teeth extraction that are too difficult for Undergrad. The patient type will need to be added for the referred clinic. This will be discussed later.

Patient Status – Grad; Patient Type – Grad XXXX

To expose the Undergrad students to more difficult cases the Grad department wants to allow the student to complete a procedure on their patient. The patient will stay in a Grad status. The patient type will need to be added. Undergrad students would need to get permission to access the patient's chart.

Patient Status – Hospital; Patient Type – Grad Pedo Hospital or Oral Surgery Hospital

These charts will continue with a suffix of K for Grad Pedo Hospital patients and H for Oral Surgery Hospital patients. These charts will change to school charts if the patient is accepted into one of the College of Dentistry clinics. Post-op appointments are the exception to this rule. If a patient that had been treated at The Med by Oral Surgery decides to come to the School for dental treatment, the H chart would be changed to a School chart number, the patient status would change from Hospital to the clinic the patient is being seen in and the patient type for that clinic would be added. *Please note that the patient must sign an NPP to become a patient at one of the Dental School clinics.*

Patient Status – Grad; Patient Type – Oral Path

These charts will continue with a suffix of P for Oral Pathology patients. These charts will change to school charts if the patient comes to the school for treatment. If a patient becomes a dental patient at the School their Oral Pathology chart would be changed to a School chart number, the patient status would either stay as Grad or changed to Active. This is determined by the clinic the patient is being seen in and the patient type for that clinic would be added. *Please note that the patient must sign an NPP to become a patient at one of the Dental School clinics.*

Patient Types

When a new chart is made the patient type will default to the Clinic making the chart. If another clinic needs access to this patient's chart the type must be added. This determines chart privileges to the Students and Residents. The patient type is found in the same area of the patient status.

The screenshot shows a patient status form with several tabs: Personal, Codes, Clinical, Guarantor, Employer, and Insurance. The 'Personal' tab is active. The form is divided into several sections:

- Name:** Title (Mrs.), Last (Test), First (Charting), Middle, Preferred (Charting), Chart (S064642). There is a checkbox for 'Fixed'.
- Personal:** Sex (Female), Birth (11/12/1955), ID. (408999999), Marital (Married), Status (SCREEN), End Date.
- Status:** Patient (checked), Emergency (checked), Special Needs (unchecked), Policy Holder (unchecked), Student (No).
- Home Address:** Address (875 Union Ave), City (University of Tn), State (TN), Zip (38163), Country. There is a checkbox for 'Address is incorrect'.
- Telephone:** Home# (901 448-5871), Work#, Other#, Other Loc.
- Contact:** Home (selected), Work, Other, Time.
- Information:** Alt Chart, Chart Area, Box#, Email.
- Assignment:** Providers..., Managers..., Faculty... (with a table below).

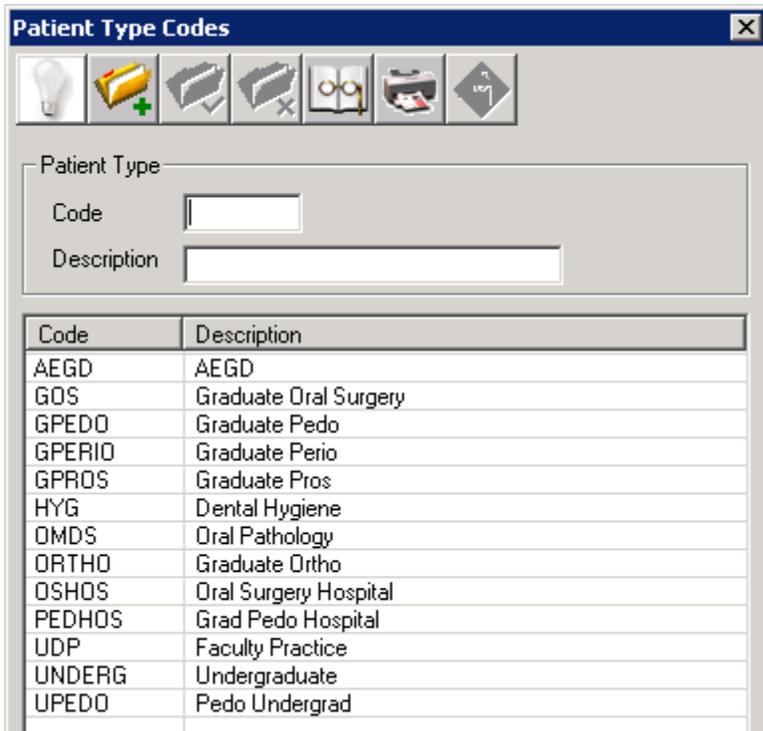
The 'Patient Types...' button in the Status section is circled in red.

Click on the Types button to bring up the Patient Type screen

The screenshot shows the 'Patient Types' dialog box. It has a title bar with a close button and a 'Show Deleted' checkbox. Below the title bar are icons for adding, deleting, and refreshing. The main area contains:

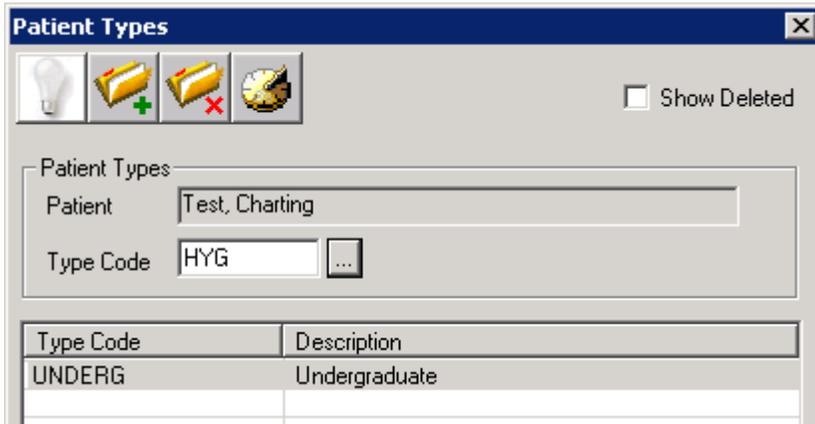
- Patient Types:** Patient (Test Charting), Type Code (UNDERG). The 'Type Code' field is circled in blue.
- Table:** A table with two columns: 'Type Code' and 'Description'. The first row shows 'UNDERG' and 'Undergraduate'.

If a type needs to be added, click on the eclipses.



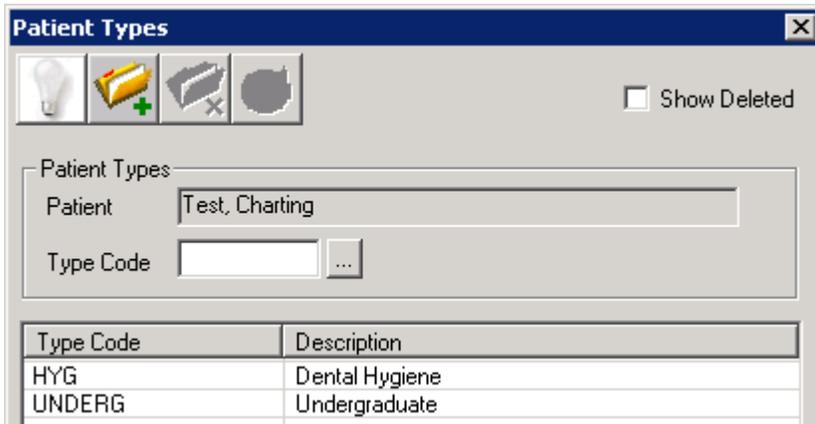
This screen will drop down. Choose

the correct type and double click.



In the example Hygiene was

chosen. Click on the add icon to save your choice.



Listed below is the default patient type per Billing Practice:

UT College of Dentistry defaults to Undergrad

UT College of Dentistry-GPEDO defaults to Grad Pedo

UT Oral/Maxillofacial Surgery defaults to Oral Surgery Hospital

Oral Maxillofacial Diag Srv defaults to OMPS

UT College of Dentistry-Ortho defaults to Ortho

University Dental Practice defaults to UDP

AEGD – Lutheran Medical College defaults to AEGD

Axium has a total of 13 patient types that could be used on a patient’s chart. If your clinic area type is not listed on the patient’s chart it could prevent the student and/or resident from accessing the patient’s chart. For example if a patient is being seen in Undergrad and is referred to Dental Hygiene, the Hygiene student will not be able to access the chart if the patient type: HYG – Dental Hygiene is not added.

These are all the patient types listed in Axium:

AEGD	AEGD
GOS	Graduate Oral Surgery
GPEDO	Graduate Pedo
GPERIO	Graduate Perio
GPROS	Graduate Pros
HYG	Dental Hygiene
OMDS	Oral Pathology
ORTHO	Graduate Ortho
OSHOS	Oral Surgery Hospital
PEDHOS	Grad Pedo Hospital
UDP	Faculty Practice
UNDERG	Undergraduate
UPEDO	Pedo Undergrad

Miscellaneous information

You will notice that some of the patient statuses have been changed to DO NOT USE. The one used most often is Will Call or Will Call with Temporary. If a patient cannot come in for treatment it should be documented, the patient changed to Inactive and a letter sent. Four

different inactivation letters will be available for use. Two of the letters will take place of the Will Call Letter and the other two will not change.