Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Using Your Personal Planner

- Location and Navigation
- Viewing Appointments
- Scheduling Appointments – D4
- Rescheduling Appointments – D4
- Logging Out of AxiUm

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

Created 061708dj
Log onto AxiUm and select your “Personal Planner”
AxiUm Training: Using Your Personal Planner

Select the "Appointments" tab
Select the down arrow beside the “Date To”
AxiUm Training: Using Your Personal Planner

Select the Month
In this instance December
Select the Date - the 31st
Select the “Looking Glass” icon

AxiUm Training: Using Your Personal Planner
Data can be sorted by clicking on the column header.
Here it is sorted by last name.
**AxiUm Training: Using Your Personal Planner**

**Dr. John D. Seeberg**
Clinic Director

---

**D4 Students** schedule their own patients by using the **AxiUm Scheduling** module.

Note: **D3** and continuing **D4 Students** do not have access to the Scheduling module – patients are scheduled by the staff schedulers.

Our **Clinic Director, Dr. John D. Seeberg**, has developed written instructions in a document titled **AxiUm Patient Instructions (for D4) Dental Students**. This document has been sent to **D4 Students**. If you need a copy of this document please contact **Dr. Seeberg** in the **Clinical Affairs Office** located on the **2nd floor (G)**.

---

Updated 12/12/11
AxiUm Training: Using Your Personal Planner

Select the “Scheduler Module”.
Advance to the date on which you wish to make an appointment. Click the green Date (shown as Jun 27, 2007) to bring up the calendar.
In this example July 27, 2007 is the current date on this calendar. Clicking on the of June will bring up the month of the year screen.
If you need to change clinics, right-click anywhere in the tan area. A gray box will appear, then choose “Select Clinic”.
AxiUm Training: Using Your Personal Planner

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.

To switch back to A.M click on the 1:00p. Available chairs will appear as white boxes.
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 Treatment Plan button.
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.
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 “<“
When all the desired procedures have been associated with the appointment select the “Close” button.
AxiUm Training: Using Your Personal Planner

Next – Select the “TX Discipline” from the drop-down menu.
Select the Discipline – In this case “Esthetics” will be selected.
Select the “Appt. Status” drop-down menu. Usually “TXPLAN” will be used for a scheduled appointment involving the treatment plan.
Make a brief note in the Reasons/Note window so that the staff can quickly see the reason for the appt. if the patient calls.
Review the information in the box. Click on the “Accept” button to close the “New Appointment” screen.
The Appointment Information is now shown as a yellow\green “floating” box with your appointment information in it. Place your pointer on it and hold the left mouse button down to move it to the tan area (time slot) your appointment will occupy. Release the box, then double-click on it to finalize your appointment reservation. The box will turn white.
This is what your appointment will look like.
The “Chair Tab” allows you to view your reserved chair.
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 reservation.
Reschedule by selecting 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.

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 to navigate to the date you plan to reschedule your appointment for. This menu functions similar to a TV remote control.
Click on a chair without a reservation (white square).
AxiUm Training: Using Your Personal Planner

Click “OK” if you receive the notification above.
Select the Active tab.
Move the floating yellow\green appointment to a tan 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
Your list of appointments will look similar to this.
Highlighting an active appointment, right-clicking → “Show History” brings up details of your appointments.
AxiUm Training: Using Your Personal Planner

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 Action – “Exit” menu or click on the “X” at the top of your screen.
AxiUm Training: Using Your Personal Planner

Click the “Yes” to continue your exit!

This concludes
AxiUm Training: Using Your Personal Planner.
Dr. Lloyd George, Michael Barbieri, Diane Weber, Frank Pancratz and Dale Jackson serve as the AxiUm Administrators (super users). We understand most of the software features and are dedicated to teaching you how to use this software and supporting the mission of the University of Tennessee College of Dentistry.

We are ready, willing and able to be of assistance to you... Please use the administrative staff whenever possible to “share” the workload.

Please be patient and understand that there will be times when one or more of us are unavailable. We can generally cover for one another, except in the areas where we specialize.

If you need additional one-on-one training come see us.

Good Luck!