

Appointment Flow:
How to Schedule, Request
Faculty Check, Treatment Plan,
and Complete a patient for the
day

Step 1: Schedule Appointment

The screenshot shows a dental scheduling software interface. The patient is 'Test Calibration1' (03/14/1986, 35 years old). The status is 'Unconfirmed'. The 'Procedure(s)' field shows '0 selected *' and the 'Other' field contains '35 yo HM, ASA II, 6 mrc prophy'. The 'Operator' is 'OP 04' and the 'Appointment Provider' is 'TestSt - Student Test'. The 'Attending Provider' is '[None]'. The 'Date' is '09/02/2021', 'Time' is '1:10 PM - 4:10 PM', and 'Length (hh:mm)' is '3:00'. The 'Note' field contains 'Enter appointment note'. The 'Save' and 'Cancel' buttons are at the bottom. Blue circles and lines highlight specific fields and their corresponding instructions in the adjacent list.

- **Don't** add procedures here.
- **Do** add information to "other"
 - This should be the presentation: Age of patient, race, gender, ASA, and what your doing for the day.
- Make sure your operator is selected.
- Make sure student seeing patient is the provider.
- **Don't** add attending provider here.
- Make sure correct appointment date and time are selected.
- Under note, add if forms have been sent.

Step 2: Keep status tracker updates

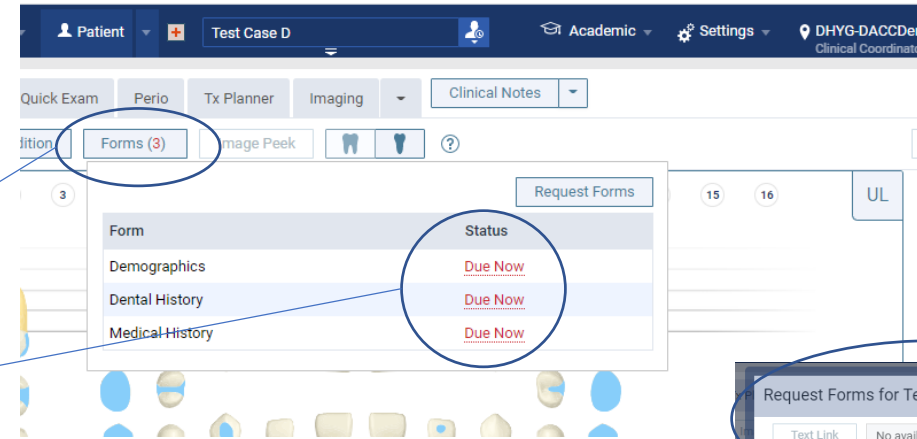
The screenshot shows the AxiomAscend web application interface. At the top, the browser address bar displays `app.axiumascend.com/pm#/schedule/calendar`. Below the address bar, there are navigation links for "Apps" and "Maps". The main header area includes a "Home" button and a calendar icon. The date "Thursday, September 2, 2021" is displayed. Below the date, there are two tabs: "Status Tracker" (selected) and "Schedule Peek". Under the "Status Tracker" tab, there is a "Patient Search" field, a filter box containing "OP 01; OP 02; OP 03" with a close button, and a "Collapse All" button. The status tracker itself is a vertical list of colored bars representing patient status: "Arriving" (yellow), "Here" (light blue), "Ready" (green), "Chair" (orange), "Checkout" (purple), and "Complete" (grey). To the right of each status bar is a small dark blue box with a white number and a dropdown arrow. The numbers are 0 for Arriving, Here, Ready, and Chair; 0 for Checkout; and 5 for Complete. A vertical sidebar on the right side of the interface contains a double arrow icon pointing left and right, which is circled in blue. Blue lines with circular endpoints point from the following list items to the sidebar arrow and the status bar counts.

Status	Count
Arriving	0
Here	0
Ready	0
Chair	0
Checkout	0
Complete	5

- Click side arrow to open status tracker.
- All scheduled patients will be on the "Arriving" status when the day starts.
- When they arrive, Ms. Guzman will mark them as "Here."
 - This will let you know that your patient is here, but they need to complete payment, paperwork, etc. and may not be ready to be called back yet.
- When they are ready to be called back, Ms. Guzman will mark them as "Ready."
 - Do not call your patient back until Ms. Guzman has marked them as ready AND until there are faculty on the floor.
- When you bring them back, mark them as in "chair."
 - This is where they will stay for the remainder of the appointment.
- Checkout and complete status will be covered later.

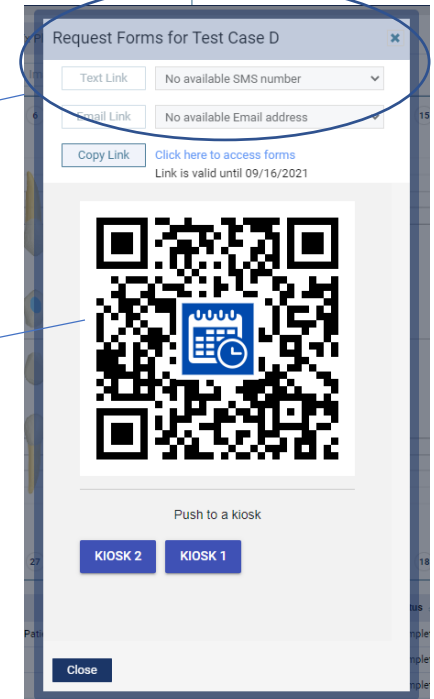
Step 3: Review MHx, DHx, Vitals, and EO/IO

- The patient should have filled out the MHx and DHx forms prior to their appointment.
 - If they didn't: you can help them do it in the chair. Click the patient chart, go to forms, and you'll see what is due now.
 - Click the red "Due Now" on any of the forms.
 - A "Request Forms" screen will come up. If you sent the forms prior, this is how you would have done it (by either texting or emailing the link). Note: to text the link, mobile number has to be selected, not work or home.
 - If you're helping them in the chair, use an iPad to scan the QR code that comes up.
 - You can then have them fill out the forms and help if needed.



The screenshot shows a patient chart for 'Test Case D'. The 'Forms (3)' tab is selected, displaying a table of forms due now.

Form	Status
Demographics	Due Now
Dental History	Due Now
Medical History	Due Now



The screenshot shows the 'Request Forms for Test Case D' dialog box. It includes options to request forms via text or email, a QR code, and buttons to push the forms to a kiosk.

Request Forms for Test Case D

Text Link: No available SMS number
Email Link: No available Email address

Copy Link: [Click here to access forms](#)
Link is valid until 09/16/2021

QR Code

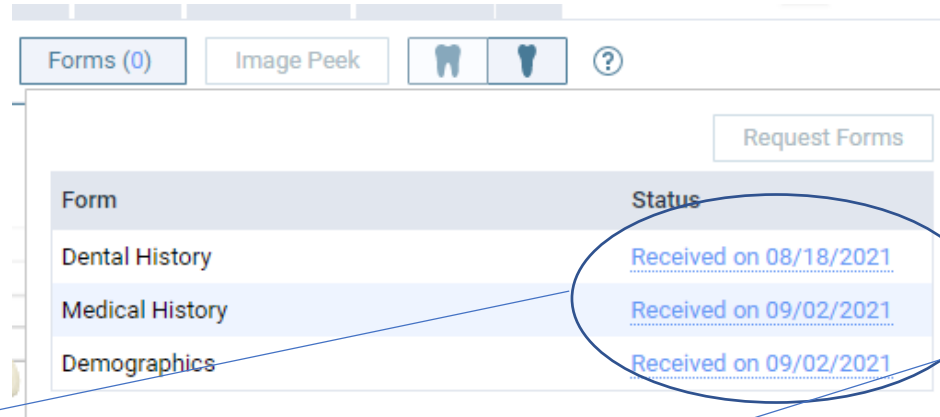
Push to a kiosk

KIOSK 2 KIOSK 1

Close

Step 3: Review MHx, DHx, Vitals, and EO/IO

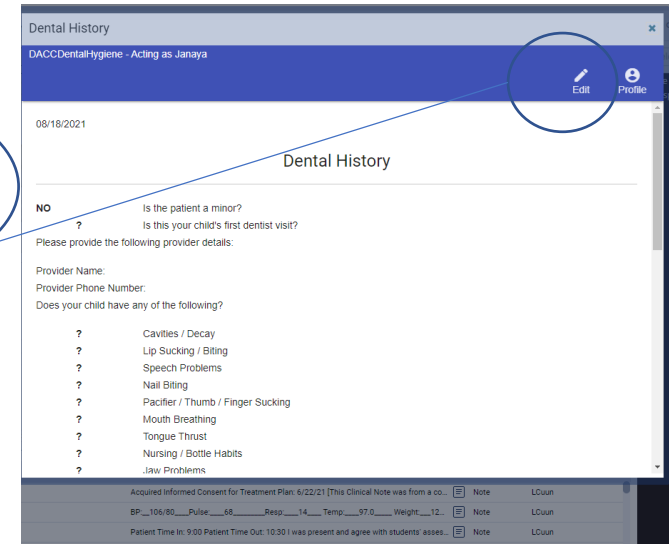
- If the patient did fill out the forms prior, you will just need to review with them for accuracy and updates.
- You will see the date the forms were filled out and received.
- Click the blue “Received on” status and the form will come up.
- You will be able to click the “Edit” button on the top right corner of the form. You need to do this at each appointment to update the MHx and DHx.
- When you finish updating, the patient will sign the update.



Forms (0) Image Peek ? ?

Form	Status
Dental History	Received on 08/18/2021
Medical History	Received on 09/02/2021
Demographics	Received on 09/02/2021

Request Forms



Dental History

DACC Dental Hygiene - Acting as Janaya

08/18/2021

Dental History

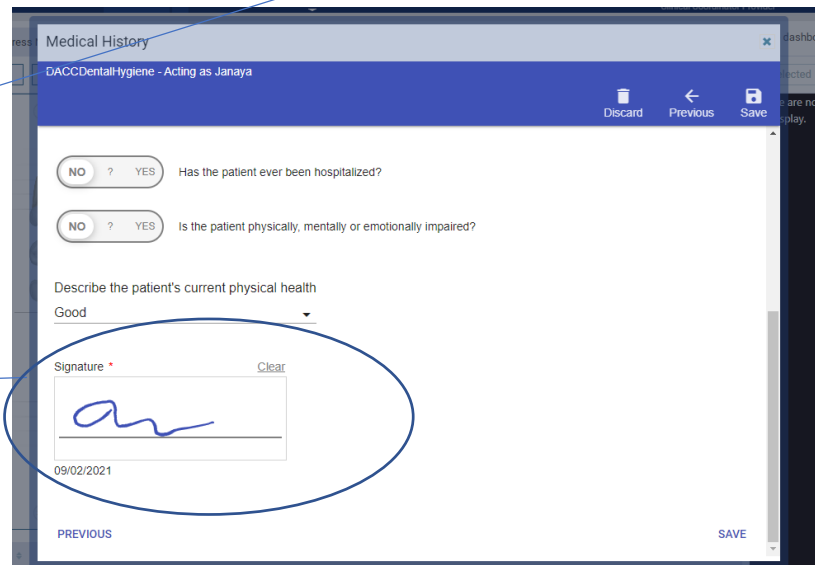
NO Is the patient a minor?
? Is this your child's first dentist visit?

Please provide the following provider details:

Provider Name:
Provider Phone Number:
Does your child have any of the following?

- ? Cavities / Decay
- ? Lip Sucking / Biting
- ? Speech Problems
- ? Nail Biting
- ? Pacifier / Thumb / Finger Sucking
- ? Mouth Breathing
- ? Tongue Thrust
- ? Nursing / Bottle Habits
- ? Jaw Problems

Acquired Informed Consent for Treatment Plan: 6/22/21 [This Clinical Note was from a co...]
BP: 104/80, Pulse: 68, Resp: 14, Temp: 97.0, Weight: 12
Patient Time In: 9:00 Patient Time Out: 10:30 I was present and agree with student's asses...
Note LCount



Medical History

DACC Dental Hygiene - Acting as Janaya

Discard Previous Save

NO ? YES Has the patient ever been hospitalized?

NO ? YES Is the patient physically, mentally or emotionally impaired?

Describe the patient's current physical health
Good

Signature * Clear

09/02/2021

PREVIOUS SAVE

Step 3: Review MHx, DHx, Vitals, and EO/IO

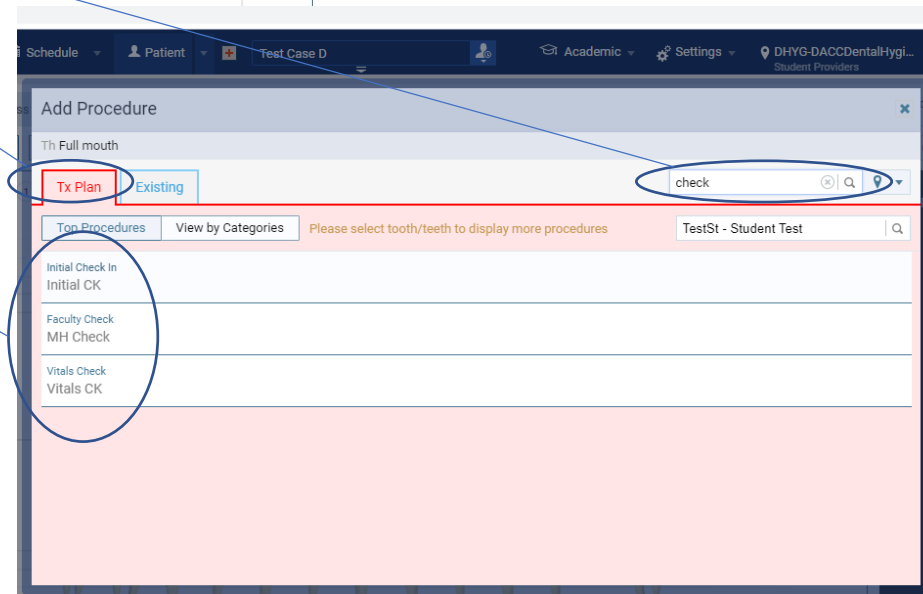
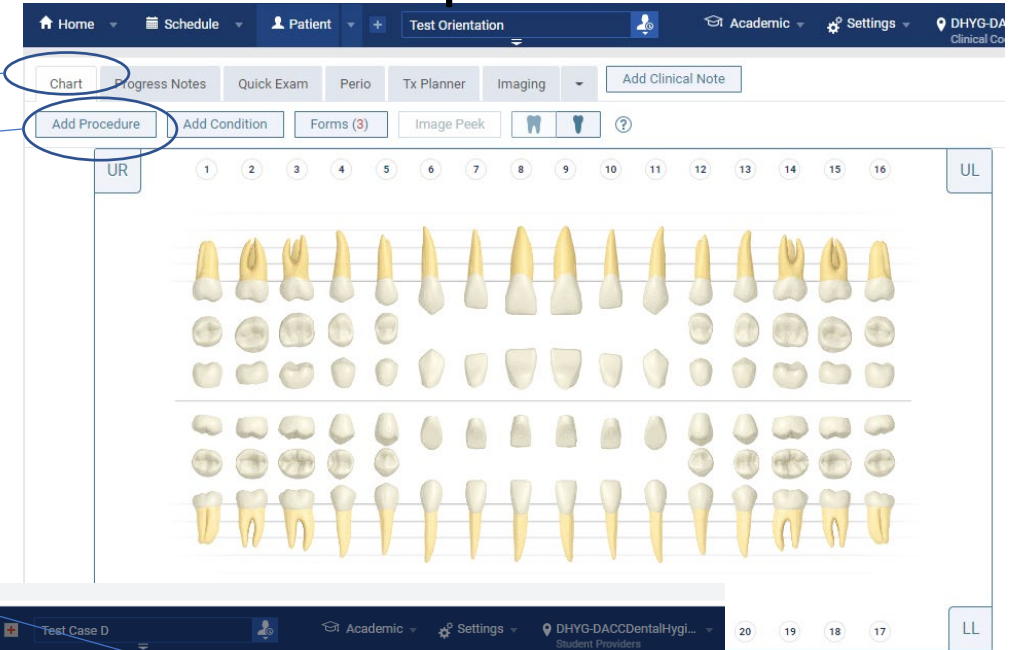
- You will need to select an initial note by clicking on the progress notes tab, and selecting the “Student Initial Treatment” template on the right hand side under Hygiene.
- You will then go through the prompts to do vitals and EO/IO and the rest of the notes; click next as you fill out the note.
- Save your progress frequently.
- Follow the same steps for your SOAP note.

The screenshot displays the 'Add Clinical Note - Test Case D - 01/01/1900' window. The 'Progress Notes' tab is active. The 'Assign teeth' section shows 'UR' and 'LR' teeth. The 'Provider' is 'TestSt - Student Test'. The 'Attending Provider' is '[None]'. The 'Date' is '09/02/2021' and the 'Appointment' is '1:00 PM'. The 'Note' field is empty. The 'Ready to sign' section has a 'No' button. The 'Save' and 'Cancel' buttons are at the bottom. The right sidebar shows a list of templates under 'Hygiene', with 'Student Initial Treatment' selected. The bottom navigation bar has 'Back', 'Next', and 'Save Progress' buttons, with 'Next' highlighted.

Templates	Procedures
Favorites	0
Administrative	4
Anesthetics	3
Clinical Exams	12
Endodontics	3
Fixed Prosthetics	6
Hygiene	6
Chart Audit	★
Local Anesthetic Ad...	★
Radiographic Evaluati...	★
Student Initial Treatm...	★
Student SOAP note	★
Vital Signs	★
Medical Alerts	5
Orthodontics	2
Patient Complaint	6
Pedodontics	2

Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- Go to chart
- Click add procedure
- Select Tx Plan
- Search “check”
- You’ll see:
 - Initial Check In
 - Faculty Check
 - Vitals Ck
- Select Initial Check for the 1st check on the day.
- Select Faculty check for any other checks needed that day.
- Vitals check are only needed if vitals are high and need to be double checked by faculty



Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

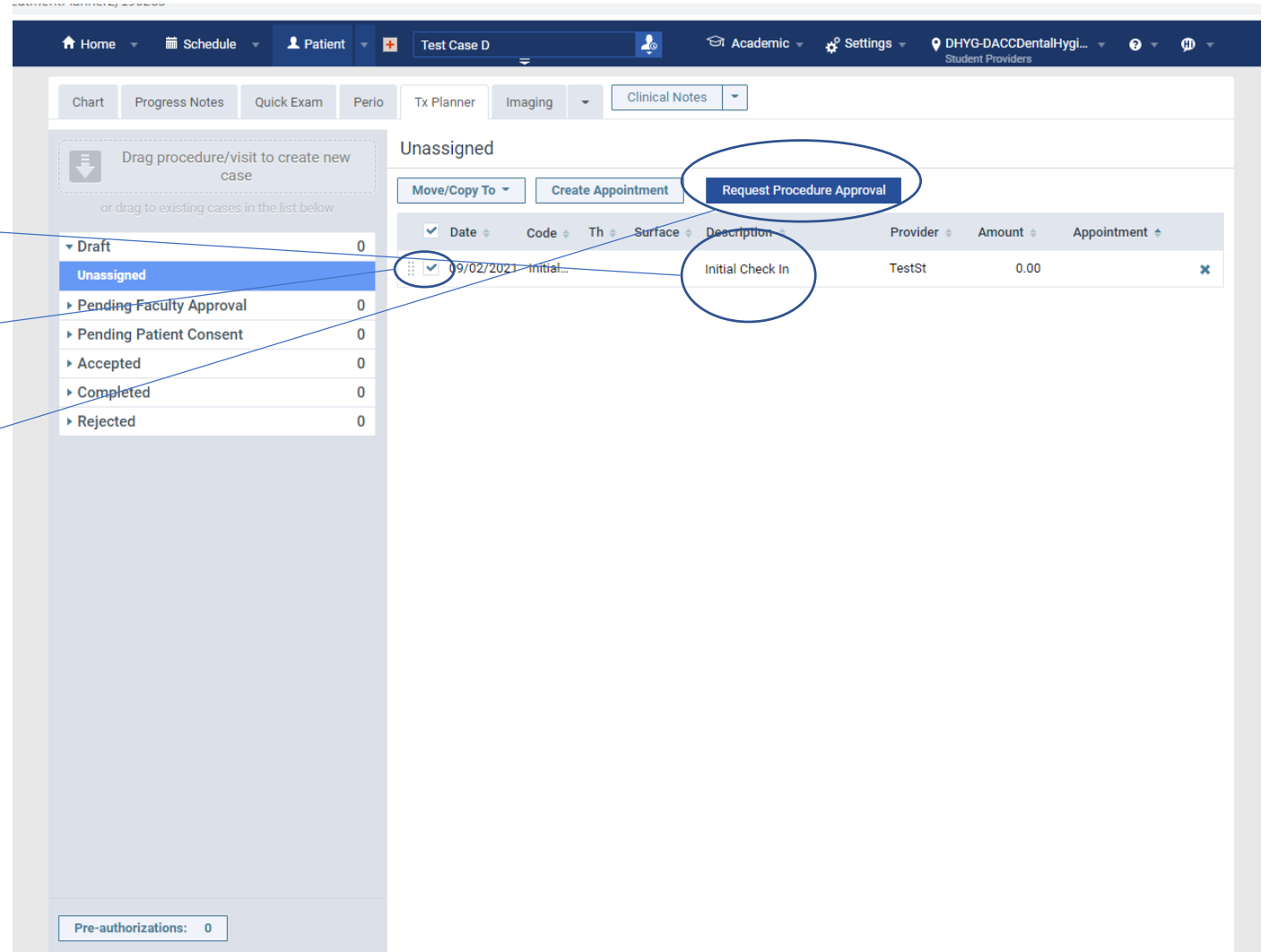
- You'll notice a pop up that says the procedure has been added and you'll see the procedure under the chart.
- Then click Tx Planner
- This will take you to another screen.

The screenshot displays a dental software interface. At the top, there's a navigation bar with options like Home, Schedule, Patient, and Test Case D. Below this, a tabbed interface shows 'Tx Planner' selected. The main area features a dental chart with teeth numbered 1-16 (UR) and 17-32 (LR). A blue highlight is on tooth 14. Below the chart is a table with columns: Date, Th, Surfaces, Code, Description, Status, and Provider. The table lists several procedures, with the last one highlighted in green.

Date	Th	Surfaces	Code	Description	Status	Provider
09/02/2021			Initial CK	Initial Check In	Tx Plan	Janaya
09/02/2021			D0210	Intraoral Full Mouth Images	Completed	TestSt
10/07/2019				Periodontal Exam	Perio Exam	LCuun
09/29/2016				[Chart note for patient 4096] BP: 103/62 Pulse: 72 Resp: 18	Note	LCuun
09/29/2016				[General Note] was present and agree with students' assessment, planned treatment, an	Note	LCuun
09/29/2016				[General Note] The procedure has been posted		LCuun

Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- When in the Tx Planner, you will see the procedure.
- Click the box to “Check it.”
- Then Click “Request Procedure Approval.”
- This will bring another pop up screen.



Step 4: Sign up for initial faculty check after MHx, DHx, Vitals, and EO/IO have been complete

- You will need to search for your faculty under “Attending Provider.”
- You will also need to select the operatory you are in.
- Then click submit.
- This will send the faculty a notification that you need a check.

The screenshot shows a web form titled "Submit Request for Approval". The form contains the following fields and elements:

- Provider:** A text box containing "Student Test".
- Request Date:** A text box containing "09/02/2021".
- Attending Provider:** A search box containing "Janaya - Janaya Bunker" with a magnifying glass icon. This field is circled in blue, with a line pointing to the first bullet point in the list.
- Operatory:** A dropdown menu showing "OP 01". This field is circled in blue, with a line pointing to the second bullet point in the list.
- Procedures:** A table with columns: Th, Surface, Code, Description, Status, and Amount. It contains one row with a checked checkbox, "Initial ...", "Initial Check In", "Tx Plan", and "0.00".
- Buttons:** "Submit" and "Cancel" buttons at the bottom. The "Submit" button is circled in blue, with a line pointing to the third bullet point in the list.

Th	Surface	Code	Description	Status	Amount	
<input checked="" type="checkbox"/>			Initial ...	Initial Check In	Tx Plan	0.00

Faculty Note

- Faculty need to Approve “Check Request” in order for students to request another check.
- Faculty can approve the check at their workstation by clicking the notification.
- This will bring up all student pending approvals. Select the one you are ready to approve/check.
- This will bring the last pop up where you can approve.

Approve Procedures

Provider
Student Test

Request Date
09/03/2021

Attending Provider
Janaya - Janaya Bunker

Operatory
OP 02

Procedures

Th	Surface	Code	Description	Status	Amount
<input checked="" type="checkbox"/>		MH Ch...	Faculty Check	Tx Plan	0.00

Approve Cancel Delete

Provider Overview

Unapproved Items
1 Last 7 Days

Provider	Chair #	Type
TestSt	OP 02	Procedure

Unsigned Clinical Notes
0 Ready 0 Draft

Evaluations
10 Last 7 Days

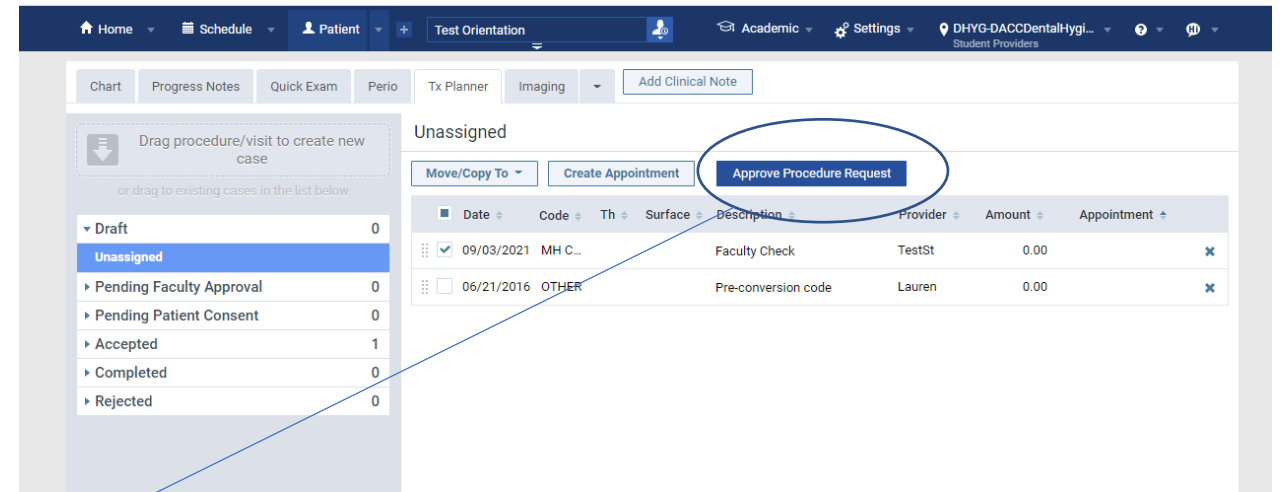
Assigned Patients
0 Count

Pending Approvals

Date/Time	Provider	Operatory	Patient	Type	Attending Provider
08/28/2021-09/03/2021	Providers...	Select operatory	Patient search	Select type	Janaya - Janaya Bunker
09/03/2021 9:14 AM	TestSt - Student Test	OP 02	Test Orientation	Procedure	Janaya - Janaya Bunker

Faculty Note

- Faculty can also approve the check at the student's work station when they go over to do the check.
- On the students computer, faculty can click "Approve Procedure Request."
- This will bring up a prompt to enter the Approvers username and password.
- Once this is entered, click approve.



The screenshot shows the 'Approve Procedures' dialog box. It has a title bar 'Approve Procedures' and a close button. The form includes fields for 'Provider' (Student Test), 'Request Date' (09/03/2021), 'Attending Provider' (Janaya - Janaya Bunker), and 'Operator' (OP 02). Below these are the 'Approver *' and 'Password *' fields, both marked as required. A blue circle highlights these two fields. At the bottom are 'Approve' and 'Cancel' buttons. A line points from the 'Approve' button in this dialog to the 'Approve' button in the first image.

Th	Surface	Code	Description	Status	Amount
✓		MH Ch...	Faculty Check	Tx Plan	0.00

Step 5: Tx Planning

- You need to Tx plan any chargeable procedure/treatment BEFORE the procedure is performed or product dispensed:
 - Radiographs
 - Bleaching trays/sports guards
 - Fluoride
 - Type of cleaning (prophy, perio maintenance, SRP, etc.)
 - Desensitization
 - Arestin
 - Sealants
 - Any products (CHX oral rinse, Prevident, etc.)
- You may have multiple treatment plans for one patient because you may not know the treatment that is needed when radiographs are taken, or a patient may want a product after you have already treatment planned the cleaning. That is okay, just make sure you make a new treatment plan for each additional service if it was not added to the initial treatment plan.
- Treatment plans need to be updated yearly or at each recare if treatment changes.

Step 5: Tx Planning

- If a patient needs radiographs, you will need to tx plan them before you take the radiographs and before you treatment plan the type of cleaning (you will not know the type of cleaning needed at this point because you have not finished assessments).
- In the chart, add the radiographs or treatment you will be doing the same way you searched for a faculty check.
- After you add in the treatment, go to the tx planner tab.
- You will see the treatment you added to the chart. You need to check the boxes to select them.
- You will need to click the “Move/Copy To” tab and select “New Case.”
- A pop up will come up asking you to select the Phase (Urgent, Control, Re-Evaluation, Definitive, or Maintenance). You will mainly use maintenance.
- Then Name the Phase with the treatment you selected so it's easy to identify.

Chart Progress Notes Quick Exam Perio Tx Planner Imaging Clinical Notes

Drag procedure/visit to create new case
or drag to existing cases in the list below

Unassigned

Move/Copy To Create Appointment Request Procedure Approval

Cases	Code	Th	Surface	Description	Provider	Amount	Appointment
New Case	D0274			Bitewing Four Images	TestSt	18.00	x
Create a copy	09/03/2021 D0330			Panoramic Image	TestSt	30.00	x

Select phase

Case has been created. Cases with the same phase will be grouped together.

Phase Name

Maintenance - Pano/BW

Save Skip

Visit 1 Total - 48.00

Step 5: Tx Planning

- Once you have created the case, you will see it on the left hand side of the screen under “Draft” as unassigned at this point.
- You then need to click “Request Approval.”
- This will send faculty a notification and they can approve from their workstation or yours.

The screenshot shows the 'Tx Planner' interface. On the left sidebar, under the 'Draft' section, the case '[Maintenance] - Pano/BW' is listed. The main panel shows the details for this case, including a 'Tx total' of 48.00, an expiration date of 09/03/2021, and a list of procedures: 'Bitewing Four Images' (18.00) and 'Panoramic Image' (30.00). At the bottom of the sidebar, the 'Request Approval' button is highlighted.

Date	Code	Th	Surface	Description	Provider	Amount	Appointment
09/03/2021	D0274			Bitewing Four Images	TestSt	18.00	
09/03/2021	D0330			Panoramic Image	TestSt	30.00	

Step 5: Tx Planning

- You will notice the case went from “Draft” to “Pending Faculty Approval.”
- Once faculty approves, the case will move to “Pending Patient Consent.”
- This means the case is now ready for the patient to sign.

The image displays two screenshots of a dental software interface, likely for a dental hygiene program. The top screenshot shows the 'Tx Planner' tab for a case named '[Maintenance] - Pano/BW'. The case status is 'Pending Faculty Approval'. A sidebar on the left shows a list of case statuses: Draft (0), Pending Faculty Approval (1), Pending Patient Consent (0), Accepted (0), Completed (1), and Rejected (0). The main area shows details for the case, including a total of 48.00, an expiration date, and a note field. Below this, there is a table of procedures:

Date	Code	Th	Surface	Description	Provider	Amount	Appointment
09/03/2021	D0274			Bitewing Four Images	TestSt	18.00	
09/03/2021	D0330			Panoramic Image	TestSt	30.00	

The bottom screenshot shows the same case, but the status has changed to 'Pending Patient Consent'. The sidebar now shows 'Pending Patient Consent' as 1, while 'Pending Faculty Approval' is 0. The main area is labeled 'Unassigned' and contains the text 'There have been no completed procedures yet.' At the bottom of the interface, there is a 'Sign' button, which is circled in red.

Step 5: Tx Planning

- The signing can be done from the faculty or student account. If from the student account, signing will need to be done with the mouse. If from the faculty account, faculty can log into an iPad and take it to the students station for easier patient signing.
- Once “sign” is clicked, a pop up asking to accept or reject the treatment case will come up. If accepting select the “✓” if rejecting, select the “X”.
- Please accept and have patient sign all recommended treatment, even if they do not want all that is recommended. For example, this would not be the case for radiographs, but if you recommend fluoride varnish and the patient is against fluoride, accept and have them sign initially, THEN go in and treatment plan fluoride again; alone this time. Go through the same process, but when you get to this screen, reject the treatment and have the patient sign that they rejected.
- This way we will have on record what treatment was recommended and what treatment, if any was declined by the patient. Please explain this process to the patient and why they are signing for both.
- To have the patient sign, click “Next-> Patient Consent Form”

The screenshot shows a software interface for patient treatment planning. The main title is "Patient Selection". Below it, a prompt says "Please accept or reject each treatment case". There is a dropdown menu currently set to "Maintenance". To the right of the dropdown are two buttons: a green checkmark button and a blue "X" button. Below the dropdown is a table with the following data:

Code	Th	Surface	Description	Amount
D0274			Bitewing Four Images	18.00
D0330			Panoramic Image	30.00

At the bottom left is a "Cancel" button. At the bottom right is a "Next → Patient Consent Form" button. To the right of the main table area is a summary box titled "Tx Plan Case Selection" containing the following:

[Maintenance] - Pano/BW	48.00
Total:	48.00

Step 5: Tx Planning


- A consent form will pop up and based on the procedure codes, a pre-written statement will come up stating explanations and risks.
- Once the patient signs, click “Sign and Confirm.”
- You will be taken back to the tx planner screen. Notice that the case moved from “Pending Patient Consent” to “Accepted.”
- This means faculty gave approval to proceed with treatment and the patient gave consent to treatment, so you may continue.
- You can review the signed treatment consent at any time in the document manager.

Consent Form

D0274: I am being provided this information so I may fully understand the procedure recommended for the patient and the consequences of my refusal. It has been recommended that the patient have routine diagnostic radiographs based on the American Dental Associations guidelines (a full mouth series every 3 years and bitewings every 1 years or as necessary). I understand that the radiographs are necessary for the student and dental professionals to evaluate, treat, or refer for possible, infection, fractured teeth, bone loss due to gum disease, cavities, and tumors. Without periodic radiographs, we cannot identify and disclose potential problems, which could lead to serious jaw infections, tooth loss, and bone destruction leading to potential jaw fractures. Failure to obtain radiographs could result in misdiagnosis, thus, DACC will not provide treatment without current radiographs. I hereby consent to DACC to obtain radiographs as planned.


D0330: I am being provided this information so I may fully understand the procedure recommended for the patient and the consequences of my refusal. It has been recommended that the patient have routine diagnostic radiographs based on the American Dental Associations guidelines (a full mouth series every 3

Put your signature here: Clear field



Presented By
Janaya Bunker

Sign & Confirm ← Back Cancel

► Draft	0
► Pending Faculty Approval	0
► Pending Patient Consent	0
▼ Accepted	1
[Maintenance] - Pano/BW  	
► Completed	0
► Rejected	0

Step 6: Checkout

- Once you are done with the appointment, you will need to go through a check-out process.
- It is different depending on:
 - If the treatment in a treatment plan was complete.
 - If a no charge treatment that was not treatment planned was complete.
 - If treatment in a treatment plan is in progress.
 - If only part of the treatment was complete that day.

Step 6: Checkout: Tx Planned Procedures Complete

- If you treatment planned a procedure, and you were able to finish what you treatment planned during the same appointment (this is usually the case for radiographs), then you need to make sure it is showing as “Completed” in the Tx planner.
- At this point, after treatment as been planned, the treatment case should be under “Accepted” on the left hand side.
- You will need to click the case under “Accepted” and “Request Procedure Approval.”
- This will bring the same popup to select the attending provider and your operatory.
- This will then send another notification to faculty to complete the procedure. Faculty can approve this at their workstation or enter their username and password at the student workstation.

The screenshot shows the 'Tx Planner' interface. On the left, a list of cases is shown with the following counts: Draft (0), Pending Faculty Approval (0), Pending Patient Consent (0), Accepted (1), Completed (0), and Rejected (0). The 'Accepted' case is highlighted and circled in blue. A blue line points from this case to the 'Request Procedure Approval' button on the right. The right side of the screen shows the details for the 'Accepted' case, including 'Tx total: 98.00', 'Expiration: MM/DD/YYYY', and a table of procedures. The 'Request Procedure Approval' button is also circled in blue.

Date	Code	Th	Surface	Description	Provider	Amount	Appointment
09/02/2021	D1206			Topical Applic Fluoride ...	TestSt	10.00	
09/02/2021	D1110			Prophylaxis - Adult	TestSt	40.00	
09/02/2021	D0274			Bitewing Four Images	TestSt	18.00	
09/02/2021	D4342	UR		Scaling & Root Planing (...)	TestSt	30.00	

Visit 1 Total - 98.00

Appointment length (h:mm) 1:00

Submit Request for Approval

Provider: Student Test

Request Date: 09/02/2021

Attending Provider: Janaya - Janaya Bunker

Operator: OP 01

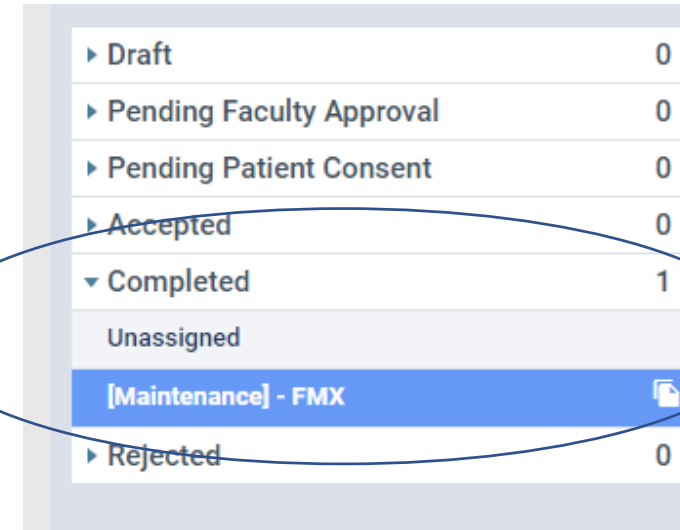
Procedures:

Th	Surface	Code	Description	Status	Amount
✓		Initial	Initial Check In	Tx Plan	0.00

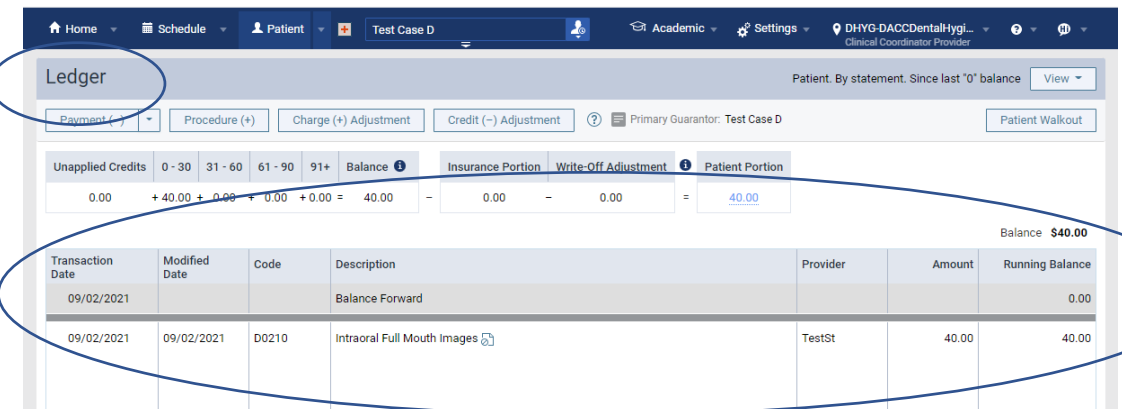
Submit Cancel

Step 6: Checkout: Tx Planned Procedures Complete

- Once approved, the case will go from “Accepted” to “Completed.”
- *Faculty note* double check that the procedure is in the ledger and that there are not any duplicates of the same procedure. You can delete duplicates from the chart or the ledger if needed.



▶ Draft	0
▶ Pending Faculty Approval	0
▶ Pending Patient Consent	0
▶ Accepted	0
▼ Completed	1
Unassigned	
[Maintenance] - FMX	
▶ Rejected	0



Home Schedule Patient Test Case D Academic Settings DHYG-DACCDentalHyg Clinical Coordinator Provider

Ledger Patient: By statement. Since last "0" balance View

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment Primary Guarantor: Test Case D Patient Walkout

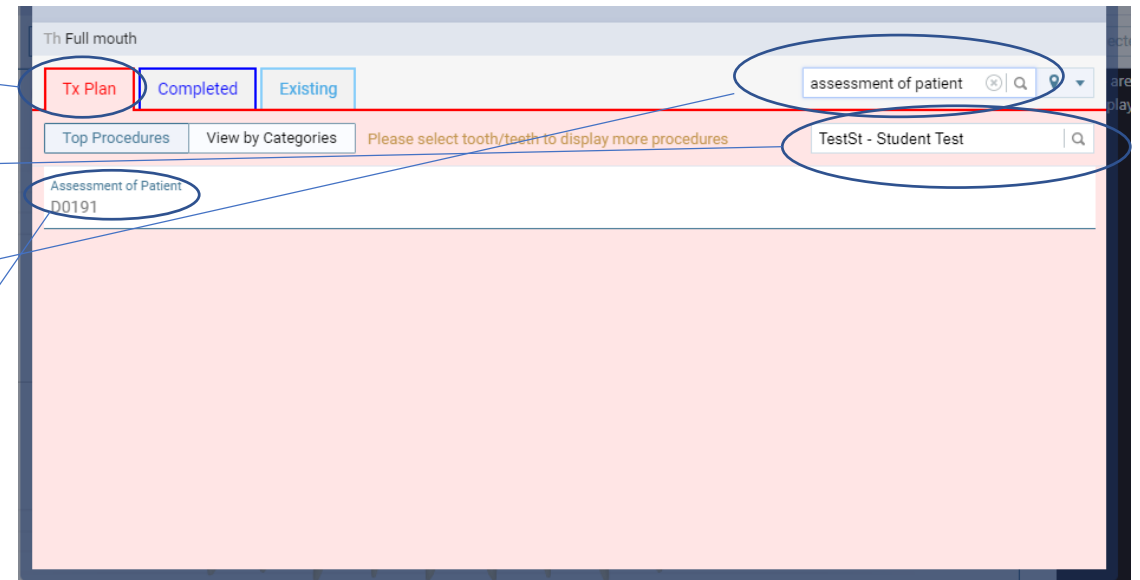
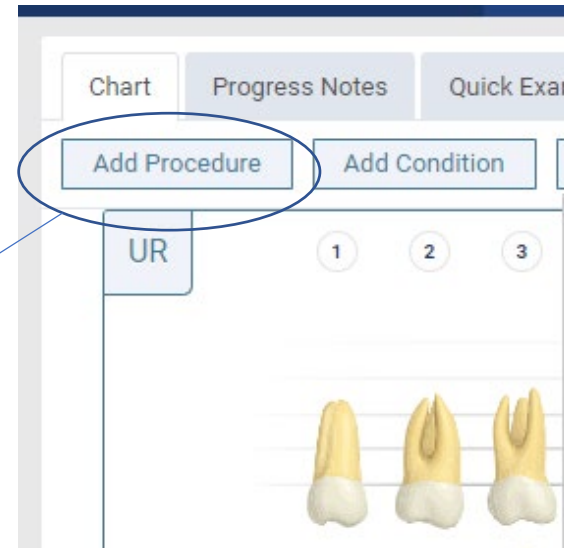
Unapplied Credits	0 - 30	31 - 60	61 - 90	91+	Balance	Insurance Portion	Write-Off Adjustment	Patient Portion
0.00	+ 40.00	+ 0.00	+ 0.00	+ 0.00	= 40.00	0.00	- 0.00	= 40.00

Balance \$40.00

Transaction Date	Modified Date	Code	Description	Provider	Amount	Running Balance
09/02/2021			Balance Forward			0.00
09/02/2021	09/02/2021	D0210	Intraoral Full Mouth Images	TestSt	40.00	40.00

Step 6: Checkout: Non-Tx Planned Procedures Complete

- If you completed only assessments for the day, for example, because your patient wasn't due for radiographs and you didn't get far enough to create a treatment plan and start treatment, you still need to show that assessments were done for the day.
- In the chart, click add procedure.
- Make sure you are on treatment plan
- *side note* for any procedure you are treatment planning, make sure you are the selected provider.
- Then search for assessments.
- When you click it, it will be added to the patient chart.



Step 6: Checkout: Non-Tx Planned Procedures Complete

- Because the patient does not need to sign consent for assessments, you do not need to go through the process of creating a case.
- All you will do is select the procedure by clicking the checkbox.
- Then select request faculty approval.
- The same prompt will come up for you to select your faculty and your op. Click submit.
- The faculty will get a notification and will need to approve the procedure at their work station or at the student workstation.

The image shows two screenshots of a software interface. The top screenshot, titled 'Unassigned', displays a table with columns: Date, Code, Th, Surface, Description, Provider, Amount, and Appointment. A single row is visible with the date 09/03/2021, code D0191, and description 'Assessment of Patient'. A checkbox next to the date is checked. A button labeled 'Request Procedure Approval' is circled in blue. The bottom screenshot shows a form with fields for Provider (Student Test), Request Date (09/03/2021), Attending Provider ([None]), and Operatory (-Select-). A table titled 'Procedures' shows the same procedure selected with a checked checkbox. A 'Submit' button is circled in blue at the bottom of the form.

✓	Date	Code	Th	Surface	Description	Provider	Amount	Appointment
✓	09/03/2021	D0191			Assessment of Patient	TestSt	0.00	

✓	Th	Surface	Code	Description	Status	Amount
✓			D0191	Assessment of Patient	Tx Plan	0.00

Step 6: Checkout: Non-Tx Planned Procedures Complete

- Once faculty approves the procedure, you will notice it is complete in the chart.
- If done correctly, the procedure will show up in the ledger.

The screenshot displays a dental software interface for 'Test Case D'. The top navigation bar includes 'Home', 'Schedule', 'Patient', 'Test Case D', 'Academic', 'Settings', and 'DHYG-DACCDen Clinical Coordinator'. Below this is a tabbed menu with 'Chart', 'Progress Notes', 'Quick Exam', 'Perio', 'Tx Planner', 'Imaging', and 'Clinical Notes'. The 'Chart' tab is active, showing a dental chart with 32 numbered teeth. The chart is divided into four quadrants: UR (Upper Right), UL (Upper Left), LR (Lower Right), and LL (Lower Left). The teeth are represented by 3D models, some of which are highlighted in blue, indicating a procedure. A blue arrow points from the text 'it is complete in the chart.' to the blue highlights on the chart.

Below the chart is a ledger table with the following columns: Date, Tr, Surfaces, Code, Description, Status, and Provider. The first row of the ledger is circled in blue and contains the following data:

Date	Tr	Surfaces	Code	Description	Status	Provider
09/03/2021			D0191	Assessment of Patient	Completed	TestSt

Step 6: Checkout: In-Progress Tx Planned Procedures

- If you treatment planned a procedure, the patient signed consent and you started treatment, but were not able to complete it, this is where you would need to add the “In Progress” code.
- This is the same process as adding a no charge code such as “assessments” as discussed in the previous slides.
- There is no need to create a new case or have the patient sign for this.

The screenshot shows the 'Tx Planner' interface. At the top, there's a navigation bar with 'Test Orientation' selected. Below it, there are tabs for 'Tx Planner' and 'Imaging'. A button 'Add Clinical Note' is visible. The main section is titled 'Unassigned' and contains buttons for 'Move/Copy To', 'Create Appointment', and 'Request Procedure Approval'. Below these is a table with columns: Date, Code, Th, Surface, Description, Provider, Amount, and Appointment. A row is highlighted with a blue circle around the 'Description' column, which contains the text 'In Progress Prophy'.

Date	Code	Th	Surface	Description	Provider	Amount	Appointment
09/02/2021	IPPro			In Progress Prophy	TestSt	0.00	09/02/2021 4:10 PM

The screenshot shows the 'Submit Request for Approval' dialog box. It has fields for 'Provider' (Student Test), 'Request Date' (09/02/2021), 'Attending Provider' (Janaya - Janaya Bunker), and 'Operator' (OP 03). The 'Procedures' section is a table with columns: Th, Surface, Code, Description, Status, and Amount. A row is selected with a checkmark in the 'Th' column, showing 'IPPro' as the Code and 'In Progress Prophy' as the Description, with a Status of 'Tx Plan' and an Amount of '0.00'.

Th	Surface	Code	Description	Status	Amount
<input checked="" type="checkbox"/>		IPPro	In Progress Prophy	Tx Plan	0.00

The screenshot shows the 'Ledger' interface. It has a navigation bar with 'Home', 'Schedule', 'Patient', and 'Test Orientation' selected. Below it, there are buttons for 'Payment (-)', 'Procedure (+)', 'Charge (+) Adjustment', and 'Credit (-) Adjustment'. The main section is titled 'Ledger' and contains a table with columns: Transaction Date, Modified Date, Code, Description, Provider, and Amount. The table shows three transactions: 'Balance Forward' on 08/31/2021, 'Assessment of Patient' on 09/02/2021, and 'In Progress Prophy' on 09/02/2021.

Transaction Date	Modified Date	Code	Description	Provider	Amount
08/31/2021			Balance Forward		0.00
09/02/2021	09/02/2021	D0191	Assessment of Patient	TestSt	0.00
09/02/2021	09/02/2021	IPPro	In Progress Prophy	TestSt	0.00

Step 6: Checkout: Partially complete Tx Planned Procedures

- If your treatment plan involved multiple codes and you were only able to complete part of the treatment plan, there is a different process.
- At this point, the case should be under “Accepted.”
- Click the case as normal and select “Request Procedure Approval,” also as normal.

The screenshot shows a medical software interface for 'Test Case D'. The top navigation bar includes Home, Schedule, Patient, and Test Case D. The main panel displays a treatment plan for '[Maintenance] - SRP'. The left sidebar shows a list of cases with the following counts:

Status	Count
Draft	0
Pending Faculty Approval	0
Pending Patient Consent	0
Accepted	1
[Maintenance] - SRP	1
Completed	1
Rejected	0

The 'Accepted' status is highlighted in blue. The main panel shows the 'Tx total: 140.00' and 'Expiration: MM/DD/YYYY'. A 'Note' field is present with the text 'Please add a note here'. The 'Request Procedure Approval' button is circled in blue. Below the button, the 'Visit 1 Total - 140.00' is displayed. The bottom section shows a table with columns: Date, Code, Th, Surface, Description, and Provider. The first row contains the date 09/03/2021, code D1206, and description Topical Anesthetic Fluoride.

Step 6: Checkout: Partially complete Tx Planned Procedures

- Where this process differs from completing a full treatment plan, when requesting approval, faculty should only approve what was done that day and not the entire treatment plan.
- For example, if SRP is need in all 4 quads, but you only completed the UR and LR, then only select those quads by checking the boxes next to only those.
- When faculty goes to approve, they will only see those selected quads; not the entire tx plan.

Submit Request for Approval

Provider: Student Test

Request Date: 09/03/2021

Attending Provider: [None]

Operator: -Select-

Th	Surface	Code	Description	Status	Amount
<input type="checkbox"/>		D1206	Topical Applic Fluoride Varnish	Tx Plan	10.00
<input type="checkbox"/>	LLq	D4341	Scaling & Root Planing (4-8)	Tx Plan	35.00
<input checked="" type="checkbox"/>	LRq	D4342	Scaling & Root Planing (1-3)	Tx Plan	30.00
<input type="checkbox"/>	ULq	D4341	Scaling & Root Planing (4-8)	Tx Plan	35.00
<input checked="" type="checkbox"/>	URq	D4342	Scaling & Root Planing (1-3)	Tx Plan	30.00

Submit Cancel

Approve Procedures

Provider: Student Test

Request Date: 09/03/2021

Attending Provider: [None]

Operator: -Select-

Approver *
This field is required

Password *
This field is required

Th	Surface	Code	Description	Status	Amount
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	URq	D4342	Scaling & Root Planing (1-3)	Tx Plan	30.00
<input checked="" type="checkbox"/>	LRq	D4342	Scaling & Root Planing (1-3)	Tx Plan	30.00

Approve Cancel Delete

Step 6: Checkout: Partially complete Tx Planned Procedures

- This is going to look different in the Tx Planner as well.
- Instead of the case moving to “Completed,” it will still be under “Accepted.”
- But, you will see that those completed procedures show as complete within the case.
 - The uncompleted procedures are still there and the option to request approval for them is still there.
 - Once all procedures in the case are complete, the case will move to “completed.”
- Check the ledger to make sure the procedures are shown there.

Drag procedure/visit to create new case
or drag to existing cases in the list below

Accepted

[Maintenance] - SRP

Tx total: 80.00
Expiration: MM/DD/YYYY
Note: Please add a note here
Accepted on: 09/03/2021

Create Appointment Create Pre-authorization Request Procedure Approval

Visit 1 Total - 110.00

Date	Code	Th	Surface	Description	Provider	Amount	Appointment
09/03/2021	D1206			Topical Applic Fluoride ...	TestSt	10.00	
09/03/2021	D4341	LL		Scaling & Root Planing (...)	TestSt	35.00	
09/03/2021	D4341	UL		Scaling & Root Planing (...)	TestSt	35.00	
Completed	D4342	LR		Scaling & Root Planing (...)	TestSt		
Completed	D4342	UR		Scaling & Root Planing (...)	TestSt		

Ledger

Patient. By statement. Since last "0" balance

Payment (-) Procedure (+) Charge (+) Adjustment Credit (-) Adjustment

Unapplied Credits 0 - 30 31 - 60 61 - 90 91+ Balance

0.00 +100.00 + 0.00 + 0.00 + 0.00 = 100.00

Insurance Portion Write-Off Adjustment Patient Portion

0.00 - 0.00 = 100.00

Balance \$100.00

Transaction Date	Modified Date	Code	Description	Provider	Amount	Running Balance
09/02/2021			Balance Forward			0.00
09/02/2021	09/02/2021	D0210	Intraoral Full Mouth Images	TestSt	40.00	40.00
09/03/2021	09/03/2021	D4342	Scaling & Root Planing (1-3) Th: LR quadrant	TestSt	30.00	70.00
09/03/2021	09/03/2021	D4342	Scaling & Root Planing (1-3) Th: UR quadrant	TestSt	30.00	100.00

Step 7: Completing the Appointment for the Day

- You will know this process is complete when your patient moves in the status tracker to “Complete.”
- You can click the drop down arrow next to complete, to make sure your patient is there.

Status Tracker

Schedule Peek

Patient Search

OP 01; OP 02; OP 03 (x)

Collapse All

Arriving	1	▼
Here	0	▼
Ready	0	▼
Chair	0	▼
Checkout	5	▼
Complete	2	▼

1:00 PM 3hr (TestSt) Complete

Case N Test
02/11/1976 (45)

Medical Alerts: High blood pressure; Diabetes

Step 7: Completing the Appointment for the Day

- ***Note*** the system requires a follow up appointment to be scheduled. If you did not schedule at the checkout (b/c the patient didn't want to at this time or b/c you already had an appointment scheduled), which is fine, you will get a pop up telling you that you need to schedule.
- You can still proceed by selecting "Provide a reason for skipping incomplete task."
- This will bring another pop up where you can enter your reason and save it. This will let you proceed to completing the appointment for the day.

The screenshot displays a medical appointment system interface for Friday, September 3, 2021. The patient is Case N Test (02/11/1976, 45). The appointment is scheduled for 1:00 PM. The status is 'Checkout'. A warning message states: 'Warning. Please complete all appointment tasks or provide a reason for skipping incomplete tasks.' The appointment tasks listed are: Schedule Recare (0), Collect Phone Number, Collect Email, and Collect Payment. A 'Reason to Skip Completing All Tasks' dialog box is open, showing the same warning and a list of tasks not completed: Schedule recare, Collect phone number, Collect email, and Collect payment. The dialog box also includes a section for 'Give a reason to skip completing all tasks' with radio button options: We did not ask, Patient declined, Patient was unable to comply, Patient departed without checkout, and Other. Enter reason below. The 'Other' option is selected, and the reason entered is: 'Recare for radiographs not needed, follow up visit to complete appointment already scheduled.'

Friday, September 3, 2021

Status Tracker Schedule Peek

Patient Search OP 01; OP 02; OP 1 Collapse All

1:00 PM 3hr (TestSt) Checkout Complete

Case N Test 02/11/1976 (45) test

Medical Alerts: High blood pressure; Diabetes

Enter appointment note

Th Surfaces Code Description Status

☐ Needs Follow-up

Chart Tx Planner Ledger

Request Procedure Approval

Warning. Please complete all appointment tasks or provide a reason for skipping incomplete tasks.

Appointment Tasks

Schedule Recare (0) Add New Recare

Collect Phone Number

Collect Email

Collect Payment Patient Walkout

Add Clinical Note

No clinical notes entered.

Print Route Slip Here Ready Chair Checkout Total 12m 12m

Due Date Appointment 09/04/2024 Unscheduled

Due to your organization's rules for appointment workflow, the appointment has been saved with "Checkout" status in order to verify that specific tasks are performed before completing the appointment.

Please perform the tasks shown in the routing panel in order to complete this appointment. Incomplete tasks will require a reason to be provided.

Reason to Skip Completing All Tasks

Warning. Due to your organization's rules for appointment workflow, the appointment has been saved with "Checkout" status in order to verify that specific tasks are performed before completing the appointment.

Following tasks were not completed:

- Schedule recare
- Collect phone number
- Collect email
- Collect payment

Give a reason to skip completing all tasks

☐ We did not ask

☐ Patient declined

☐ Patient was unable to comply

☐ Patient departed without checkout

☒ Other. Enter reason below

Recare for radiographs not needed, follow up visit to complete appointment already scheduled.

Save Reason Cancel

Step 8: Completing and signing notes

- Every patient should have a Student Initial Treatment note AND a Student SOAP note.
- The Initial Note should be started first and should be in progress until the patients full treatment is complete.
 - You will need a new initial note at each recare appointment.
- There will need to be a SOAP note created each time the patient comes in.

The screenshot displays the 'Add Clinical Note' window for patient 'Test BC' on '06/27/1972'. The 'Assign teeth' tab is active. The 'Provider' field is set to 'TestSt - Student Test'. The 'Attending Provider' is '[None]'. The 'Date' is '09/07/2021' and the 'Appointment' is '-'. The 'Note' field is empty with the placeholder 'Type note text here'. The 'Ready to sign' section has a 'No' button. The 'Signature for Student Test is not set.' message is present. The sidebar on the right shows a list of templates under the 'Templates' tab, with 'Student Initial Treatment' and 'Student SOAP note' circled in blue.

Template	Count
Favorites	0
Administrative	4
Anesthetics	3
Clinical Exams	12
Endodontics	3
Fixed Prosthetics	6
Hygiene	6
Chart Audit	★
Local Anesthetic Ad...	★
Radiographic Evaluati...	★
Student Initial Treatm...	★
Student SOAP note	★
Vital Signs	★
Medical Alerts	5
Orthodontics	2
Patient Complaint	6
Pedodontics	2

Step 8: Completing and signing notes

- *ONCE A NOTE IS SIGNED, IT CANNOT BE EDITED*
- When you believe notes are ready to be signed:
 - Ask for faculty approval. Faculty will review notes for any errors.
 - Once errors are fixed, faculty may give the okay to sign notes.
- To sign, toggle the “Ready to Sign” switch to “Yes.”
 - At this point, DO NOT enter an attending provider. (If you do, it will put the attending providers signature instead of the students signature).
- Students will need to enter their password to sign notes.

Clinical Note - Test BC - 06/27/1972

Th [Assign teeth](#)

Provider *
TestSt - Student Test

Attending Provider:
[None]

Date * 09/07/2021 Appointment: -

Note *

P (Plan)
Treatment Rendered: Assessments, began adult prophylaxis; finished upper arch.
Planned Treatment for Next Visit: Finish adult prophylaxis; lower arch, apply topical fluoride varnish.
Pain Management Plan for the patient consists of: Discussed possible use of LA, patient does not need it.
Referrals Given: General dental referral given at last appointment on 6/25/2021

Created by Janaya Bunker

Ready to sign:
☒ Yes

Password *

Save Cancel Delete

Templates Procedures

▶ Favorites	0
▶ Administrative	4
▶ Anesthetics	3
▶ Clinical Exams	12
▶ Endodontics	3
▶ Fixed Prosthetics	6
▶ Hygiene	6
▶ Medical Alerts	5
▶ Orthodontics	2
▶ Patient Complaint	6
▶ Pedodontics	2
▶ Periodontics	4
▶ Prescriptions	3
▶ Recommendations	3
▶ Removable Prosthetics	3
▶ Restorative	6

Step 8: Completing and signing notes

- **Once a note is signed, it cannot be edited.**
- If a note needs to be corrected after it was signed, an addendum can be made, by checking the “Add addendum as”
 - It is preferred that this not be done unless necessary, because the correction is made at the bottom of the note, rather than to the note itself.
- You can verify that the students signature is added.
- Then, at this point, the attending faculty signature can be requested by searching the faculty's name.
- Faculty will have to enter their password also in order to sign.

Signed Clinical Note - Test BC - 06/27/1972

Th No teeth assigned

Date of last dental exam: 6/25/2021
Any complications to care: none, FMX - 18 films, 6/25/2021
O (Objective)
Oral Cancer Assessment: EO: generalized freckling, NSF
IO: white coating tongue, bilateral linea alba, Normal
A (Assessments)
Patient's Goals: Floss at least 3x/week
Clinician's Goals: Keep encouraging regular flossing.
P (Plan)
Treatment Rendered: Assessments, began adult prophylaxis; finished upper arch.
Planned Treatment for Next Visit: Finish adult prophylaxis; lower arch, apply topical fluoride varnish.
Pain Management Plan for the patient consists of: Discussed possible use of LA, patient does not need it.
Referrals Given: General dental referral given at last appointment on 6/25/2021

Signed by Student Test 09/07/2021

Additional Provider

Additional Provider [None] Q

Add Addendum

☐ Add addendum as

Save Cancel

- This is a working document. If at any point any procedures need to be amended, please let clinical coordinators or director know so that appropriate and accurate updates may be made.