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**TO: DENTAL HYGIENE 3 STUDENTS**

**FROM: Dr. T. Reeve, Associate Dean (Clinical), Michelle Oshanyk (Managing Director)**

**DATE: April - 2026**

**RE: DH3 CLEARANCE PROCEDURES**

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*As a Requirement for Graduation*, each Dental Hygiene 3 student is responsible for ensuring the ongoing care or dismissal of all patients in their patient pool. It is your professional responsibility to properly and timely transfer patient care.

**Students must sign-up for all appointments by April 9, 2026. The file will be locked after this date.**

**Students must show up at their respective appointment times, accommodations cannot be made.**

All sections in this document must be completed and signed **during the week of clearance**. Before your name can be presented to the Promotions Committee, the procedures listed below must be completed and you must receive clearance from the following people. Please return the completed form to **Michelle Oshanyk, Managing Director by May 1, 2026**.

**If you are late and/or miss your clearance appointment, you will be required to email Dr Reeve for a new appointment date the following week.**

## INSTRUCTIONS

### AxiUm Instructions

#### STUDENT REVIEW OF ASSIGNED PATIENTS:

**STUDENTS MUST PRINT OUT A LIST OF ALL THEIR PATIENTS FROM AXIUM.** Reviewing their axiUm list, students must designate each patient to a specific category in the **STUDENT DISPOSITION sheet** located in your MS Clearance TEAM.

#### Assigned Patient Reports

Go to: **Personal Planner**

Select: **Assigned Patients** tab

Select: **Date From** and **Date To** Dates from drop down menu.

Select: **Search for Data** (Hour Glasses)

Select: Print Report (or work of system)

The screenshot shows the 'Personal Planner' software interface. At the top, there are search and filter icons. Below these, the 'Provider' is set to 'A9999' and the 'User' is 'Student\_Test'. The 'Date From' is '01/07/2020' and the 'Date To' is '24/02/2023'. The main area contains a table with the following columns: Pt Chart, Pt Status, Appointments, Pt Name, Start Date, End Date, Is Primary, Is Restricted, and Discipline. The table lists various patients with their respective details.

Pt Chart	Pt Status	Pt Name	Start Date	End Date	Is Primary	Is Restricted	Discipline
RAD033	A	Bird, Lary	19/08/2022	01/09/2022	No	No	
T1	I	Exan, Teddy	11/06/2004	31/12/2100	No	No	
RAD018	A	RADAbdul-Jabbar, Kareem	12/07/2019	29/03/2022	No	No	
RAD018	A	RADAbdul-Jabbar, Kareem	26/09/2022	30/09/2022	Yes	No	
RAD018	A	RADAbdul-Jabbar, Kareem	26/01/2023	30/06/2024	Yes	No	
RAD034	A	RADBarkley, Charles	19/04/2021	30/06/2024	No	No	
RAD011	A	RADChamberlain, Wilt	20/09/2017	30/06/2024	Yes	No	
RAD115	A	RADDawkins, Johnny	07/10/2018	30/06/2024	Yes	No	
RAD007	A	RADewing, Patrick	27/06/2018	30/06/2024	Yes	No	
RAD114	A	RADFerry, Darryl	06/12/2019	30/06/2024	No	No	
RAD036	A	RADHaper, Ron	24/05/2019	30/06/2024	No	No	
RAD008	I	RADJordan, Michael	11/05/2017	30/06/2024	No	No	
RAD101	A	RADKerr, Steve	02/06/2017	30/06/2024	No	No	
RAD101	A	RADLowry, Kyle	03/06/2021	30/06/2024	Yes	No	
RAD101	I	RADMalone, Moses	12/05/2017	30/06/2024	Yes	No	
RAD012	A	RADMikan, George	12/05/2017	30/06/2024	Yes	No	
RAD026	A	RADPice, Mark	21/09/2020	30/06/2024	No	No	
RAD112	A	RADRedick, J.J.	21/08/2018	30/06/2024	Yes	No	
RAD016	A	RADWalton, Bill	09/08/2019	30/06/2024	No	No	
RAD104	A	RADWest, Jerry	12/07/2019	30/06/2024	No	No	
RAD102	A	RADWooden, John	27/06/2018	30/06/2024	No	No	
RAD002	A	RADoulos, Barry	11/01/2023	30/06/2024	No	No	
RAD005	A	RADShaw, O'Neal	20/09/2017	30/06/2024	Yes	No	

Your **Dental Hygiene PCC** will meet with you to discuss each patient that is being transferred or dismissed. The **axiUm patient list** must be brought to your **Patient Review** appointment. You must complete the **STUDENT DISPOSITION sheet in MS TEAMS prior to meeting with your DH PCC.** The patient must have a 'zero' balance prior to being released.



Review the link below for your individual sheet. After reviewing your Patient List, complete all fields of the **STUDENT DISPOSITION SHEET.**

**MS TEAMS DH3 Disposition Sheets link:** Click here (This link will provide access to the folder as of March 19, 2026.)

(On March 25<sup>th</sup> Sabrina & Carley will be attending your lecture to review the Clearance Instructions with your class. At this time, they can answer any questions that you may have regarding the patient and axiUm portion of Clearance)

For each of your patients, update all relative correspondence regarding the patient in the **axiUm Contact Notes**. Pertinent correspondence would include any information regarding the patient's availability (time, financially), attendance (i.e. reason(s) for missed or short notice cancelled appointments), the patient's desire to continue in the program next year or inability to continue in College program (i.e. moved, not interested, declining disease control, deceased, CDCP going to PP, etc.)

If a patient correspondence letter is required due to inability to continue, notify your PCC.

### 1. **TREATMENT COMPLETED**

For patients that you have completed, indicate this in the column **"Patient Dental Hygiene Status"** section on your PATIENT LIST in MS TEAMS. Indicate the SPT level and the appropriate recall date.

## 2. PATIENTS to be DISPOSITIONED

For patients you cannot reach, are unavailable or do not want treatment, indicate this in the columns “**Is Patient Committed to Dental Hygiene Care at the College, Patient Availability, Comments**” section on your PATIENT LIST in MS TEAMS. When dispositioning a patient, please enter the reason for disposition in detail in the **Contact Notes** in **axiUm**.

## 3. PATIENTS YOU WERE UNABLE TO SEE

For patients you were unable to see during the academic year, indicate this in the column “**Patient Seen for Dental Hygiene During the Academic Year**” on your PATIENT LIST in MS TEAMS.

You must contact these patients and confirm their interest in future appointments/treatment. Please indicate in the column “Comments” why patients were not seen this past academic year and if there was a history deferring treatment.

Document in the contact notes confirmation that the patient wishes to continue with the program for next term. For patients you are unable to reach by phone (**3x Attempts**), coordinate with your PCC to send out “**unable to contact**” letter.

PRIOR to meeting with your PCC for your **Patient Review**, all required/pertinent information must be entered/completed in **axiUm** and in the **STUDENT DISPOSITION SHEETS in MS Clearance TEAMS**.

**The two reports below (IN-PROCESS and UNAPPROVED),** need to be printed after resolving ALL In Process treatments and Unapproved treatments. The reports should be brought to your **axiUm Review meeting with PCC Leads**.

### IN PROCESS TX:

**All In-Process codes will need to be addressed PRIOR to your axiUm Review appointment with PCC Leads.**

Print the following report and review all procedure codes and ensure there are no in-process codes that could generate a balance. If there are any in-process procedure codes, you will have two options to resolve them:

- a) If the procedure code is not going to be completed, ask the **PCC Leads** to suspend the procedure code and \$0.00 balance the fee; or IF PATIENT IS CONTINUING NEXT TERM, DO NOT ZERO BALANCE.
- b) If you want the procedure code deleted, changed or completed, submit an **axiUm correction card form** prior to **April 10, 2026**, signed by original approver. If the original approver is not available, the clinical coordinator can approve the correction form. The **Correction Card Form** must be actioned to the PCC Leads

### “All In Process Tx by Patient”

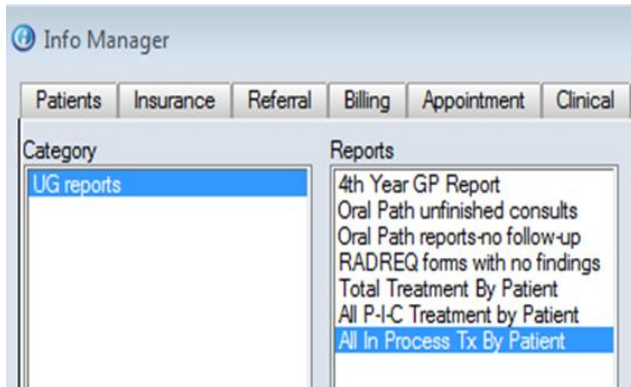
Go to: **Info Manager**

Select: **Custom Reports** tab

Select: **UG Reports**

Select: **All In Process Tx by Patient** report

Press: **Select All** and **Print**



### UNAPPROVED TREATMENT:

Print the following report and review all unapproved procedure codes, notes and forms. You are responsible for ensuring patient procedure codes, notes and forms are approved by an instructor.

Patients no longer assigned to you can be free accessed for the day by emailing a list to your **PCC**.

If you need a procedure code deleted, changed or completed, **submit an axiUm correction card form prior to April 10, 2026, and action it to PCC Leads**

### “Unapproved tab”

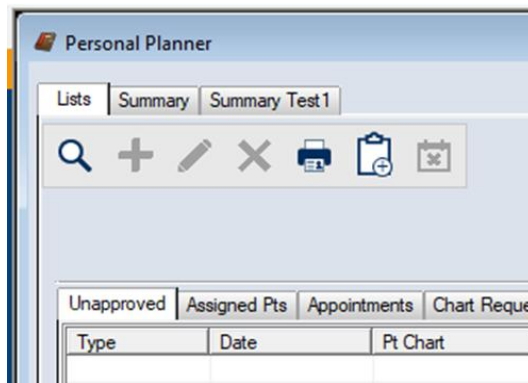
Go to: **Personal Planner**

Select: **List tab**

Select: **Unapproved** tab

Press: **Search**

Select: **Print**



Type	Date	Pt Chart	Pt Name	Code	Site	Surf	Description	Sts	Discipline
Treatment	27/08/2019	A2032	Bansal, Mohit	01201			Comprehensive Exa...	I	TxPlan
Treatment	27/06/2019	A2032	Bansal, Mohit	01201			Comprehensive Exa...	I	TxPlan
Treatment	28/01/2013	T22222	Barth, James	11101			Polishing 1 unit	I	
Note	22/08/2022	RAD033	Brd, Lary				Template Note		
Note	22/08/2022	RAD033	Brd, Lary				Template Note		
Note	22/08/2022	RAD033	Brd, Lary				Template Note		
Note	25/08/2022	RAD033	Brd, Lary				Template Note		
Note	29/08/2022	RAD033	Brd, Lary				Template Note		
Note	31/08/2022	RAD033	Brd, Lary				Template Note		
Note	31/08/2022	RAD033	Brd, Lary				Template Note		
Treatment (Del)	22/08/2022	RAD033	Brd, Lary	0100.O			Patient Management	D	
Treatment	25/08/2022	RAD033	Brd, Lary	02112			Two Images	P	Radiology
Treatment	25/08/2022	RAD033	Brd, Lary	01201			Comprehensive Exa...	P	TxPlan
Treatment	25/08/2022	RAD033	Brd, Lary	21223	47	MOD	Pem Molar 3 Surf Am	C	Oper
Treatment	25/08/2022	RAD033	Brd, Lary	1N300.2			Scaling 3 Units	I	Perio
Treatment	25/08/2022	RAD033	Brd, Lary	1N300.1			Complete Perio Exa...	C	Perio
Treatment	25/08/2022	RAD033	Brd, Lary	1N300			New Perio Patient ...	I	Perio
Treatment	25/08/2022	RAD033	Brd, Lary	0100.O			Patient Management	C	
Treatment	25/08/2022	RAD033	Brd, Lary	33131	16		RCT 3 Canals	I	Endo
Treatment	25/08/2022	RAD033	Brd, Lary	33131.A	16		Diagnosis	C	Endo
Treatment	29/08/2022	RAD033	Brd, Lary	01201			Comprehensive Exa...	P	TxPlan
Treatment	29/08/2022	RAD033	Brd, Lary	02112			Two Images	P	Radiology

Review all codes in process as indicated on this report. Clean up “I’s” (In Process) and “P’s” (Planned) treatment, as required. If there are any errors for treatment that has been completed - “C”, please complete an **axiUm Correction Card form and submit by April 10, 2026.**

**DO NOT DELETE** any planned or completed treatment yourself.

If you need a procedure code deleted, changed or completed, **submit an axiUm correction card form prior to April 10, 2026, and action it to PCC Leads**

After resolving **ALL** In-Process and Unapproved treatments, print both reports and bring them to your **axiUm Review appointment with PCC Leads.**

**Before** beginning the next section of **Patient Balances**, ensure you have **completed both In-Process and Unapproved treatment reports.**

**CLEARANCE OF PATIENT BALANCES:**

Print the following report and review **ALL** patient balances.

You are responsible for communicating outstanding balances to your patients before your **Patient Review meeting with your PCC.** A printout of the **Patient Balance List** must be presented to your PCC and to Michelle Oshanyk, Managing Director for review.

Ensure you have taken all necessary actions to collect the outstanding fees from these patients. Document **all** correspondence you have had with the patient in the patient's "Contact Notes" in axiUm.

Review your patient accounts. Ensure all appropriate codes have been entered. **All** "In Process" procedures must be addressed; either Completed (with appropriate swipe) or Suspended with an EHR note giving the reason.

If you find an incorrect entry and need to make an adjustment or note a discrepancy in axiUm, review at your **meeting with PCC Leads**. In some cases, **PCC Leads** may correct the account or refer you to your instructor for the completion and grading of procedures.

**Remember** the accuracy of your patient's account and your grades are dependent on you selecting the appropriate codes and status (ie: Completed – "C" vs. In process – "I")

To print your **PATIENT BALANCES** List:

Go to: **Info Manager**

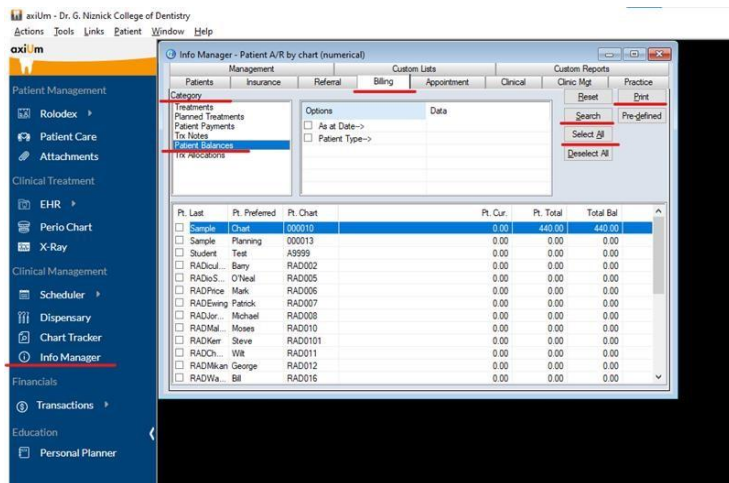
Select: **Billing Tab**

Under Category Scroll down and select: **Patient Balances**

Press: **Pre-Defined** button

Select: **Patient A/R by Chart (Numerical)** report

Press: **Search** (when you get message)



### RADIOLOGY REQUEST FORMS & REPORTS:

Radiology Request forms and reports that you have initiated for patients must be completed and approved for clinic clearance.

**An email will be sent to students notifying them of existing radiology reports to complete.**

**You will only be required to attend this appointment if radiographs were taken of your patient during your clinical treatment.**

**The Radiology Forms and Reports will be reviewed with you during the RADIOLOGY REPORTS appointment with Dr Nowakowski in Specialty Clinic D116 – April 20 9:00-10:00 am**

To obtain the chart #'s of the patients with missing reports go to:

Go to: **Info Manager**

Select: **Custom** tab

Select: **UG Reports** category

Select: **RAD REQ Forms with No Findings** reports

Press: **Print** Option to open the Excel spreadsheet with report details.

You will find the chart #'s listed beside your provider # (column F).

**The patients on your list need to be swiped for approval.**

Patients no longer assigned to you can be free accessed for the day by emailing a list to your PCC.

**ALL OUTSTANDING, NON-INTERPRETED RADIOGRAPHS MUST BE COMPLETED, INTERPRETED AND APPROVED.**

**ASSIGNED FORMS REPORTS**

Go to: **Personal Planner**

Select: **Assigned Forms** tab

Select: **Date From** and **Date To** Dates from drop down menu.

Select: **Search for Data** (Hour Glasses)

Select: **Print Report** (or work of system)

Chart #	Name	Form #	Date	Description	Status	Assigned To
RAD033	Bird, Lary	371567	31/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371474	31/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371427	30/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371108	25/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	370765	22/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD018	RADAbdul-Jabbar, Kareem	376166	26/09/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD011	RADChamberlain, Wilt	390618	05/01/2023	Axiom Correction Card Form	OPEN	Student, Test
RAD007	RADewing, Patrick	296647	20/02/2020	CBCT Request Form		Student, Test
RAD007	RADewing, Patrick	295966	13/02/2020	CBCT Request Form		Student, Test
T0006	Conrad, Hermes	104504	01/08/2014	Consult Referral & Report	FOLLOW	Student, Test
T00011	Nibbler, Alien	104892	18/08/2014	Consult Referral & Report	FOLLOW	Student, Test
	Student,	377064	29/09/2022	DH New Pt. Req. Form		Student, Test
	Student,	371803	02/09/2022	DH New Pt. Req. Form		Student, Test
	Student,	370814	22/08/2022	DH New Pt. Req. Form		Student, Test
RAD033	Bird, Lary	371106	25/08/2022	DH Pt. Transfer/Disp. Form		Student, Test
RAD033	Bird, Lary	370720	22/08/2022	DH Pt. Transfer/Disp. Form		Student, Test
RAD011	RADChamberlain, Wilt	390614	05/01/2023	DH Pt. Transfer/Disp. Form	OPEN	Student, Test
RAD011	RADChamberlain, Wilt	390405	04/01/2023	DH Pt. Transfer/Disp. Form	OPEN	Student, Test
1111	RADar, Doppler	334705	24/08/2021	Fee Waiver / Adjustment Form		Student, Test
RAD033	Bird, Lary	371466	31/08/2022	General Referral Form	OPEN	Student, Test
RAD018	RADAbdul-Jabbar, Kareem	371551	31/08/2022	General Referral Form	OPEN	Student, Test
RAD011	RADChamberlain, Wilt	390963	09/01/2023	General Referral Form	OPEN	Student, Test
RAD011	RADChamberlain, Wilt	390866	09/01/2023	General Referral Form	OPEN	Student, Test

**The forms in BLUE require approval.**

**If the form needs to be “Actioned” (sent) and it is assigned to your yourself, the form was never sent or received by the recipient.**

- If required, action the form to the appropriate recipient. This is indicated at the bottom of the form.
- If you no longer see the form, it is no longer assigned to you and is with the recipient.

Review the following forms to ensure they are actioned properly:

- axiUm Correction Cards
- General Referral Forms
- Radiology Report
- Fee Waiver/Adjustment Form

## **MS Teams Sign-up for Individual Appointments**

***Review the link below to sign-up for appointments in each of the following categories***

### **MS Teams DH3 Clearance Sign-Up Sheets Link**

1. **MDR CLEARANCE**

*See Microsoft Teams for MDR Appointment sign-up*

**Before selecting a MDR Clearance time slot: You must be finished all clinics & all instruments processed through MRD before appointment**

- a. Return College-owned prophylaxis handpiece & to be inspected by MDR Staff
- b. Return MDR Bunk Key
- c. Collect all instruments during MDR appointment

**PLEASE BRING SEVERAL LARGE BAGS TO PLACE ALL YOUR MDR ITEMS IN**

2. **DENTAL KIT RETURN**

*No sign-up required for this item, drop by Dental Stores D028D during clearance week*

- a. Return your Local Anesthetic syringe to Dental Stores

**You will be CHARGED ON YOUR STUDENT axiUm ACCOUNT for any lost or unreturned items**

3. **MAILBOX KEY RETURN**

*No sign-up required for this item, drop by SDH Office D212 to see Bernadette Franco from 9:00 am – 4:00 pm.*

- a. Clear out all items from your student mailbox
- a. Return mailbox key to SDH Office

**A \$25.00/key fee will be CHARGED ON YOUR STUDENT axiUm ACCOUNT for a lost key**

4. **RADIOLOGY REPORTS**

*No sign-up is required for this item. An email will be sent to students who need to complete this requirement.*

**a. If you have been notified by email to complete this step, meet Dr. Nowakowski on April 20 between 9-10 am in Specialty Clinic D116.**

- b. Print outstanding Radiology Forms and Reports prior to your meeting
- c. Complete forms and reports
- d. Bring printed report to appointment

5. **PATIENT REVIEW**

*See Microsoft Teams for PATIENT REVIEW Appointment sign-up*

- a. Complete your individual HYGIENE DISPOSITION SHEET in MS TEAMS
- b. Review your Patient Balances in axiUm
- c. **Patient Review needs to be completed before AxiUm Review**

6. **axiUm IN-PROCESS CODES and CORRECTION CARDS REVIEW**

*See Microsoft Teams for AxiUm Review Appointment sign-up*

- a. Complete & submit all axiUm Correction Card forms & action to PCC Leads by **April 10, 2026**
- b. All In-Process and Unapproved Tx must be corrected in axiUm **PRIOR** to your axiUm Clearance appointment
- c. Print a copy of your In-Process and Unapproved Treatment Forms and bring these reports to your appointment
- d. **Patient Review needs to be completed before AxiUm Review**

7. **CLINICAL REQUIREMENT REVIEW**

*See Microsoft Teams for CLINICAL REQUIREMENTS REVIEW Appointment sign-up*

Ensure that the following HYGN 2316 clinical requirements are complete and Weekly Clinic Summaries are submitted to the appropriate folder on UM Learn:

- i. Moderate Case Competency
- ii. Complex Case Competency
- iii. Complex Case Requirement
- iv. Implant Requirement
- v. Ultrasonic Requirement
- vi. Pediatric Requirement
- vii. Local Anesthetic Requirements
- viii. Clinical Progress Report – Reporting Period #6
- ix. Dietary Intake for Caries Management and Health Promotion Assignment
- x. Communication Reflection Assignment
- xi. Ensure clinic utilization is at least 90%
- xii. Hand Scale Requirement

8. **STUDENT EMAIL ADDRESSES**

*No sign-up required for this item, drop by the College of Dentistry Dean's Office D113*

**Before the end of Clearance**

- a. Each student is required to provide the Dean's office with a personal email address for Alumni purposes

9. **ACCOUNT BALANCES**

*See Microsoft Teams for ACCOUNT BALANCE Appointment sign-up*

- a. **All signatures on the checklist (1-8) must be completed BEFORE your Account Balance appointment**
- b. Any outstanding fees associated in you STUDENT axiUm Account, must be paid at reception **BEFORE** your Account Balance appointment
- c. Michelle Oshanyk will confirm zero balance of Student axiUm Account
- d. Print your Patient Balances and bring list to your appointment
- e. Review your Patient Balances and give explanation of existing balance
- f. Submit Completed Clearance Form with Michelle Oshanyk for review by Dr T Reeve

Student Name: \_\_\_\_\_

Year: DH3

## Checklist and Signatures

Check	Student Initial	Task	Submit	Signature	Date
<input type="checkbox"/>		<b>1. MDR Clearance</b> <i>See sign-up sheet for appointment</i> <ul style="list-style-type: none"> <li>○ Prophy Handpiece Returned &amp; inspected</li> <li>○ MDR Bunk Key Returned</li> <li>○ Collect all instruments</li> </ul>	MDR Technicians Shirley or Jenna N D133		
<input type="checkbox"/>		<b>2. DENTAL KIT RETURN</b> <i>No sign-up required</i> <ul style="list-style-type: none"> <li>○ Local Anesthetic Syringe Returned</li> </ul>	Dental Stores Sheila or Jenna M D028D		
<input type="checkbox"/>		<b>3. MAILBOX KEY RETURN</b> <i>No sign-up, drop by SDH Office during clearance week</i> <ul style="list-style-type: none"> <li>○ Clean out mailbox &amp; return key</li> </ul>	Bernadette Franco Dental Hygiene Office D212		
<input type="checkbox"/>		<b>4. RADIOLOGY REPORTS</b> <i>If emailed, meet Dr Nowakowski in Specialty Clinic D116 on 1-2:00 pm on April 20</i> <ul style="list-style-type: none"> <li>○ Request Forms/Reports Completed</li> </ul>	Dr. Nowakowski Specialty Clinic D116	IF NOTIFIED – signature is required	
<input type="checkbox"/>		<b>5. PATIENT REVIEW</b> <i>See sign-up sheet for appointment</i> <ul style="list-style-type: none"> <li>○ Patient Review Completed</li> <li>○ Patient Fees Collected</li> </ul>	Sabrina Raposo CSS Office D126D		
<input type="checkbox"/>		<b>6. STUDENT EMAIL ADDRESSES</b> <i>No sign-up, drop by the Dean's Office D113 Before the end of Clearance</i>	COD Dean's Office D113		
<input type="checkbox"/>		<b>7. CLINICAL REQUIREMENTS</b> <i>See sign-up sheet for appointment</i>	Angela Rosales DH3 Clinic Coordinator D212C		
<input type="checkbox"/>		<b>8. axiUm REVIEW</b> <i>See sign-up sheet for appointment</i> Patient Review Completed before axiUm Review appointment	Marta Bhopalsingh CSS Admin Offices D126D Carley Tokar D123B		
<input type="checkbox"/>		<b>9. ACCOUNT BALANCES:</b> <i>See sign-up sheet for appointment</i> Lost/Missing/Replaced Equipment Charges: Balance Due: Paid: Yes <input type="checkbox"/> No <input type="checkbox"/> Receipt: Yes <input type="checkbox"/> No <input type="checkbox"/>	Michelle Oshanyk CSS -Managing Director D126C		

<input type="checkbox"/>	<b>10. CLEARANCE COMPLETED</b> <i>Note: Signature from Dr. T. Reeve on your attached Clearance form will occur ONLY when all Patient Care and administrative matters have been resolved.</i>	<b>Dr. T. Reeve</b> <b>Associate Dean, Clinical</b>		
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