



TO: DENTISTRY 2 STUDENTS

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

DATE: April 2, 2026

RE: CLEARANCE PROCEDURES

***As a Requirement for Promotion*, each Dentistry 2 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 and failure to do so would impact their completion of DENT 2202 Introduction to Comprehensive Care course.**

Students must sign-up for all appointments by May 1, 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 clearance week**. Failure of a student to comply with the responsibility of timely submission of documents may affect the completion of a student's program year.

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 21, 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

MS Teams Sign-up for Individual Appointments

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

Microsoft Teams link: [Click Here](#)

1. **BRASS LAB UNIT CLEANING**

Cleaning Date: May 19 from 12:00-1:00 pm in BRASS LAB.

- a. All D2 Students are to meet in the BRASS lab to perform cleaning of their assigned lab unit.
- b. Dental Assistants overseeing this cleaning will inspect all units for the entire class at this time. Attendance by all students is mandatory.

- c. All areas in the individual unit must be cleaned acceptably
 - Wipe clean counters and light
 - Remove any wax from surfaces
 - Clean ADEC simulator unit and rheostat
 - Remove items from lab drawers and lockers

Failure to clean your Brass Lab Unit and/or attend the Brass Lab Cleaning session will result in a \$250.00 LAB Cleaning Fee ON YOUR STUDENT axiUm ACCOUNT

2. MDR CLEARANCE

See Microsoft Teams for MDR Appointment sign-up

Before selecting a MDR Clearance slot: You must finish all clinics & all instruments processed through MDR before appointment

- a. All MDR bunks items must have been processed and filed in your MDR bunk.
- b. Pick-up: Perio Kit, Clinic Handpieces, Red Bur Block, Composite gun, and Exam Kit
- c. MDR Staff will assist you in placing all items from the MDR bunk in your own bag/box at your appointment time.

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

YOU MUST PICK UP YOUR ITEMS FROM MDR BEFORE your Dental Kit Clearance

3. DENTAL KIT RETURN

See Microsoft Teams for DENTAL KIT Appointment sign-up

Dental Kit appointments will run on time – if you are more than 5 minutes late for your appointment, you will be rescheduled at end of Clearance. You must contact Dr Reeve for a new Clearance appointment time

- a. Pick up all items from MDR
- b. Print the KIT LIST documents found in your STUDENT AxiUm account
 - i. Attachments
 - ii. Paper Chart Info
 - iii. Agreement/Contract
- c. Reconcile, clean & organize **ALL** your kit items **PRIOR** to your Dental Kit appointment
- d. Bring **ALL** your items to your appointment
- e. Dental Kit appointments do not have a Lost and Found. It is expected that students work with each other to reconcile borrowed or missing Kit Items within the class, **PRIOR**, to your Dental Kit Return appointment.
- f. **You will be CHARGED ON YOUR STUDENT axiUm ACCOUNT for any lost or broken items that need replacing**
- g. **ALL KIT ITEMS MUST BE RETURNED AT THE TIME OF YOUR APPOINTMENT. IF THE KIT ITEM IS NOT RETURNED DURING THE KIT APPOINTMENT, IT WILL BE DEEMED NOT RETURNED & YOU WILL BE CHARGED FOR THE MISSING ITEM.** Students are not permitted to return kit items after your Kit appointment or Clean Kit Items during the appointment.
- h. **Dental kits/instruments that are deemed uncleaned will be charged a \$250.00 Kit Cleaning Fee ON YOUR STUDENT axiUm ACCOUNT.**

4. ENDODONTIC EQUIPMENT, DREMEL RETURN & MECHANICAL JAWS RETURN

See Microsoft Teams for ENDO EQUIPMENT RETURN Appointment sign-up

- a. Sign up for an appointment with your partner
- b. Ensure all Endodontic equipment is cleaned, allocated for & placed in the bin
- c. Staff will confirm equipment is functioning & all items returned including the Calamus tip
- d. Bring your Dremel to your appointment to verify Dremel is undamaged and working
- e. Bring your Mechanical Jaws for inspection to confirm that all components are present

5. **KEY RETURN**

No sign-up is required for this item - drop by the College of Dentistry Dean's Office D113 before the end of clearance

- a. Remove all items from second floor locker, wipe inside of locker clean & return locker key
- b. Return MDR Key
- c. Report any issues related to locks and/or keys at this appointment

A \$25.00 fee will be CHARGED ON YOUR STUDENT axiUm ACCOUNT for a lost second floor locker key

A \$150.00 fee will be CHARGED ON YOUR STUDENT axiUm ACCOUNT for a lost Brass Lab Locker Key

6. **RADIOLOGY REPORTS**

No sign-up is required for this item – Contact Dr Haimeur to review reports

- a. Review outstanding Radiology Forms and Reports, you can find this in your Personal Planner
- b. Complete forms and reports PRIOR to meeting Dr Haimeur
- c. Indicate you have finished entering findings by changing the Form status to “FIN” & Delete your name from the User Field to unassign from yourself
- d. Print report and bring report to your appointment

7. **PATIENT REVIEW - NEW FOR D2**

See Microsoft Teams for PATIENT REVIEW Appointment sign-up

- a. Complete your individual PATIENT DISPOSITION SHEET in MS TEAMS
- b. Review your Patient Balances in axiUm & give explanation of balances
- c. **Patient Review needs to be completed before axiUm Review**

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

See Microsoft Teams for axiUm Appointment sign-up

- a. All In-Process and Unapproved Tx must be corrected in axiUm PRIOR to your axiUm Review appointment
- b. Complete **ALL** axiUm Correction Cards & Action to PCC Leads **by May 1, 2026**, to ensure they are processed before your appointment
- c. Print your In-Process/Unapproved Tx Reports showing no outstanding In-process/Unapproved Codes and bring reports to your appointment (*see instructions below*)

9. **DISPENSARY ITEMS RETURNED**

No sign-up is required for this item, drop by Main Clinic Dispensary D138

- a. Return all dispensary items **before May 1 at 12:00 Noon.**
Failure to return trays by May 1 at 12: noon, will result in students being CHARGED ON YOUR STUDENT axiUm ACCOUNT
- b. Items must be returned cleaned, free of debris
- c. Items to be returned:
 - Alginate Tray
 - Biteforks
 - Other Dispensary Items
- d. Signatures on Clearance Checklist will be given during the **week of clearance – May 19-22**

10. CHILD AND ADULT ABUSE REGISTRY CHECKS

No Sign-up is required for this item - drop by the College of Dentistry Dean's Office D113 before the end of clearance

Dentistry and Dental Hygiene Students must complete application forms for both Child and Adult Abuse Registry each year while enrolled in the school.

- a. Report to the Dean's Office, D113 to complete two separate application forms
- b. Bring 2 (two) pieces of ID
 - ID Accepted:
 - i. SIN card
 - ii. Band and Status Card
 - iii. Passport
 - iv. Birth Certificate
 - v. MHSC Card
 - vi. Driver's License

The College/School will submit the forms directly to the government agency, which, once processed, will be sent directly back to the College/School. There is no Fee for this service.

11. ACCOUNT BALANCES

See Microsoft Teams for ACCOUNT BALANCE Appointment sign-up

- a. **All signatures on the checklist (1-10) must be completed BEFORE your Account Balance appointment**
- b. Any outstanding fees associated in your 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 for your appointment (*see instructions below*)
- 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

axiUm Instructions

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:

Print the following report and review all procedure codes and ensure there are no in-process codes that could be generating a balance.

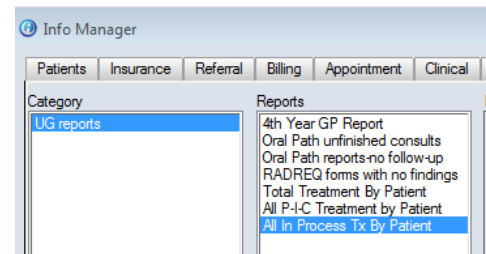
NOTE: All In-Process codes will need to be addressed PRIOR to your **axiUm Review appointment with PCC Leads**. This is done by submitting a **correction card prior to May 1, 2026, signed by original approver**. **If original approver is not available, your course coordinator must sign the correction card.**

If there are any in-process procedure codes, you have three options to resolve them:

1. **SUSPEND** - If the patient is NOT going to continue, request **PCC Leads** to suspend code and \$0.00 balance the fee. IF PATIENT IS CONTINUING NEXT TERM, suspend code but DO NOT ZERO BALANCE.
2. **DELETE** - If you want to have the procedure code deleted
3. **COMPLETE** - If you want to have the procedure code completed

“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

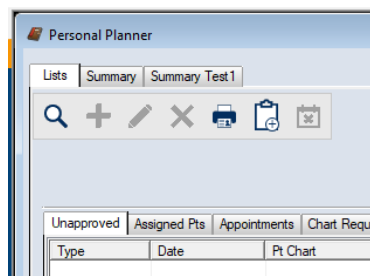
Print the following report and review all unapproved procedure codes, notes, and forms. You are responsible to ensure patient procedure codes; notes and forms are approved by an instructor.

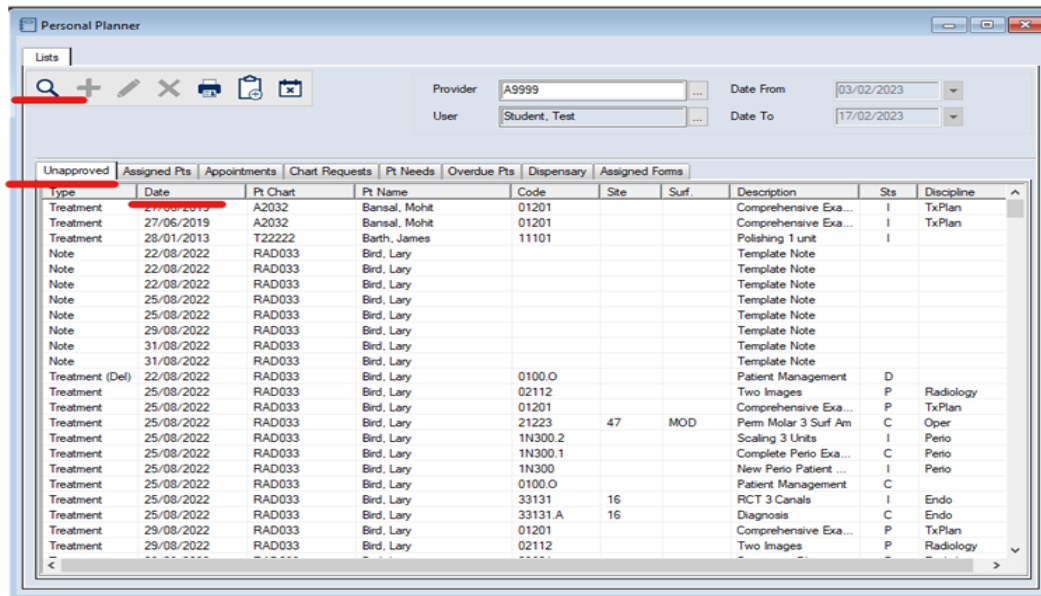
Patients no longer assigned to you can be free accessed for the day by emailing a list to your **PCC**.

If you need a procedure code deleted, changed or completed, **submit an axiUm correction card form prior to May 1, 2026, and action it to PCC Leads.**

“Unapproved tab”

Go to: **Personal Planner**
Select: **Lists** tab
Select: **Unapproved** tab
Press: **Search**





Select: **Print**

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**

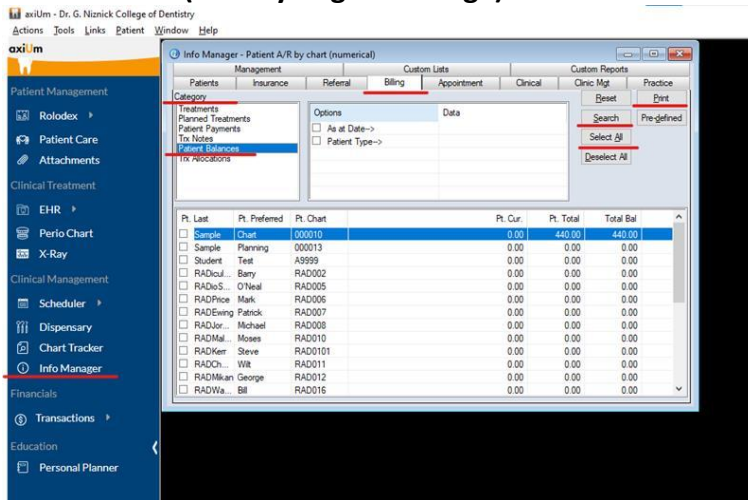
Select: **Billing Tab**

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:

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

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 # listed beside your provider # (column F).

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

All reports must be completed and approved.

Please see Dr Haimeur to review Radiology Forms and Reports

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	axiUm Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371474	31/08/2022	axiUm Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371427	30/08/2022	axiUm Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371108	25/08/2022	axiUm Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	370765	22/08/2022	axiUm Correction Card Form	OPEN	Student, Test
RAD018	RADAbdul-Jabbar, Kareem	376166	26/09/2022	axiUm Correction Card Form	OPEN	Student, Test
RAD011	RADChamberlain, Wilt	390618	05/01/2023	axiUm 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, Hemes	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	371465	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 and Oral Pathology Consult Referral and Report
- Fee Waiver/Adjustment Form

APPOINTMENTS:

All Appointments scheduled in your chair must have an accurate “Type” reflected in the “Appointment Tab” of your Personal Planner. There should be no remaining appointments listed as “Active.”

If you have an appointment that is not up to date or is still listed as “Active” go back into your chair on the axiUm schedule and update the appointment to reflect the **true** status of the appointment (Patient Check In/Patient Check Out, Cancelled, Failed.)

Appointments

Go to: **Personal Planner**

Select: **Appointments Tab**

Select: **DATE From** (01/09/2025)

Select: **DATE To** (Current date)

Select: **Search for Data** (Magnifying Glass)

The screenshot shows the Personal Planner application window. The 'Appointments' tab is selected. The 'Date From' filter is set to 01/09/2025 and the 'Date To' filter is set to 17/03/2026. The 'Appointments' tab is highlighted in red. The table below shows a list of appointments with columns for S, P, Type, Pt Name, Pt Chart, Phone #, Date, Time, Clinic, and Reason.

S	P	Type	Pt Name	Pt Chart	Phone #	Date	Time	Clinic	Reason
		Checked Out				21/01/2026	08:30 AM	Main Clinic	
		Checked Out				21/01/2026	09:15 AM	Radiology	
		Deleted				22/01/2026	01:30 PM	Main Clinic	
		Checked Out				22/01/2026	01:45 PM	Main Clinic	15 MO
		Checked Out				23/01/2026	09:00 AM	Main Clinic	
		Deleted				03/02/2026	01:30 PM	Main Clinic	SPT3
		Checked Out				04/02/2026	08:30 AM	Main Clinic	mand border m...
		Checked Out				05/02/2026	08:30 AM	Main Clinic	Patient was tre...
		Checked Out				05/02/2026	09:15 AM	Radiology	
		Checked Out				06/02/2026	09:00 AM	Main Clinic	
		Checked Out				06/02/2026	09:45 AM	Radiology	
		Checked Out				06/02/2026	09:45 AM	Radiology	
		Checked Out				10/02/2026	01:30 PM	Main Clinic	Sectioning 36 c...
		Checked Out				12/02/2026	08:30 AM	Main Clinic	NPP3 recall exam
		Deleted				12/02/2026	08:30 AM	Main Clinic	
		Checked Out				25/02/2026	08:30 AM	Main Clinic	two fillings. eith...
		Checked Out				26/02/2026	08:30 AM	Main Clinic	Denture
		Checked Out				03/03/2026	01:30 PM	Main Clinic	possible endo, ...
		Active				05/03/2026	01:30 PM	Main Clinic	27 and 37 OPs
		Active				10/03/2026	01:30 PM	Main Clinic	endo 16. cleani...
		Checked Out				12/03/2026	08:30 AM	Main Clinic	
		Active				12/03/2026	01:30 PM	Main Clinic	16 cleaning an...
		Active				13/03/2026	09:00 AM	Main Clinic	

Student Name: _____ Year: DENTISTRY 2

Checklist and Signatures

Check	Student Initial	Task	Submit	Signature	Date
<input type="checkbox"/>		1. BRASS LAB UNIT CLEANING May 19 from 12:00-1:00 pm	Dental Assistants: Kelsey & Anthony		
<input type="checkbox"/>		2. MDR <i>See sign-up sheet for appointment-</i> Pick up: <ul style="list-style-type: none"> ○ Perio Kit ○ Handpieces ○ Red Bur Block ○ Composite gun ○ Exam Kit 	MDR Technicians Shirley & Jenna N D132		
<input type="checkbox"/>		3. DENTAL KIT RETURN <i>See sign-up sheet for appointment</i>	Sheila or Jenna M Dental Stores D028D		
<input type="checkbox"/>		4. ENDO EQUIPMENT, DREMEL & MECHANICAL JAW RETURN <i>See sign-up sheet for appointment</i> <ul style="list-style-type: none"> ○ Calamus Unit/Rotary Endo Unit ○ Dremel is undamaged and working ○ Mechanical Jaws components are present 	Nik Rave Lemlem W Unit 65 Main Clinic		
<input type="checkbox"/>		5. KEY RETURN <i>No sign-up, drop by the COD Dean's Office D113</i> before the end of clearance <ul style="list-style-type: none"> ○ Second Floor Locker Key ○ MDR Key 	COD Dean's Office D113		
<input type="checkbox"/>		6. RADIOLOGY REPORTS <i>No sign-up required</i> See Dr Haimeur before End of Clinic <ul style="list-style-type: none"> ○ Request Forms/Reports Completed 	Dr Haimeur Before end of Clinic		
<input type="checkbox"/>		7. DISPENSARY ITEMS <i>No sign-up required</i> RETURN by May 1, 2026, at 12:00 pm Signatures given during week of clearance <ul style="list-style-type: none"> ○ Alginate Trays ○ Biteforks ○ Other Dispensary Items 	Main Clinic Dispensary D138 Dental Assistants Signature to be obtained May 19-21 only		
<input type="checkbox"/>		8. CHILD & ADULT ABUSE REGISTRY FORMS <i>No sign-up, drop by the COD Dean's Office D113</i> Before the end of clearance <ul style="list-style-type: none"> ○ Bring 2 (two) pieces of ID 	COD Dean's Office D113		
<input type="checkbox"/>		9. PATIENT REVIEW <i>See sign-up sheet for appointment</i>	Athena Specialty Clinic		

		<ul style="list-style-type: none"> ○ Patient Review Completed ○ Patient Fees Collected 	D116		
<input type="checkbox"/>		<p>9. axiUm REVIEW <i>See sign-up sheet for appointment</i> May 20, 2026</p>	<p>Marta, Bhopalsingh, CSS Admin Offices D126D Carley Tokar- D123B</p>		
<input type="checkbox"/>		<p>10. ACCOUNT BALANCES THIS IS YOUR LAST APPOINTMENT <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"/></p>	<p>Michelle Oshanyk, Managing Director D126C CSS Admin Offices</p>		
<input type="checkbox"/>		<p>11. CLEARANCE COMPLETED <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></p>	<p>Dr. T. Reeve Associate Dean, Clinical</p>		