Dr. Gerald Niznick College of Dentistry
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Winnipeg, MB R3E 0W2

University of Manitoba | Rady Faculty of Health Sciences

TO: **Dentistry 3 Students**

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

DATE: **November 2, 2026**

RE: **CLEARANCE PROCEDURES**

Each Dentistry student is responsible for ensuring the ongoing care or disposition of patients in their patient pool.

Students must sign-up for all appointments by November 16th, 2026, at 3:00 pm**.** The file will be locked after this date.

Students must show up at their respective appointment times as such, accommodations cannot be made. If an appointment is missed, or if you are late for an appointment, your appointment will be rescheduled on December 21st and can only be rescheduled by contacting Dr T Reeve directly. Family members are not allowed to be present during clearance appointments

All sections in this document must be completed prior to your clearance appointments. Signatures will be only given completion of each appointment.

The procedures listed below must be completed and you must receive clearance from the following people. Please return the completed form to **Michelle Oshanyk by December 15th, 2026.**

INSTRUCTIONS

STEP 1: axiUm Instructions

**The Radiology Forms and Reports will be reviewed with either Drs Nowakowski, A Kim & V Hunzinger prior to the end of clinics – December 4th.*

RADIOLOGY REQUEST FORMS & REPORTS:

Radiology Request forms and reports you have initiated for patients must be completed (findings tab) and approved for clinic 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.

Follow the steps outlined below:

1. Review radiographic images taken
2. Complete Radiology Report/Findings
3. Meet with Dental Faculty/ Team Mentor to review Report/Findings
4. Approval of Radiology Report/Findings
5. Running Man: Running man and change the status from REQ à to FIN.
6. Remove student name from the user field by clicking "X"

To obtain Radiology Reports that are require status changes:

These reports must be completed and approved by either Drs Nowakowski, A Kim, V Hunzinger

Assigned Forms
Go to: Personal Planner
Select: Lists Tab
Select: Assigned Forms
Press: Search

You will find the chart # listed beside your provider # (column F).
Patients that are no longer assigned to you can be free accessed for the day by providing a list to your **PCC.**

NOTE: Pediatric Radiology Reports need to be reviewed and approved by a Pediatric Instructor.

STUDENT REVIEW OF ASSIGNED PATIENTS:

STUDENTS MUST EMAIL THEIR PCC AN UPDATE OF ALL THEIR PATIENTS BY DECEMBER 4TH 2026. Follow up with patients that they are currently assigned but have not yet booked or require to be dispositioned. Inform your Patient Care Coordinator (PCC) if there are any patient management issues, patients that are delaying treatment, refusing disease control or ready for disposition.

PATIENTS TO BE RELEASED FROM TREATMENT

Patients that have COMPLETED TREATMENT and are NOT RETURNING

This includes patients where their treatment, by their own choice, is completed. These are patients that will not be returning to the College for any reason (e.g. they do not wish to continue here, or 'will think about it'; are not deemed suitable or do not wish to participate in the DH maintenance program etc.). All contact notes should be updated to reflect this.

Please note: if your patient has been deferring treatment throughout the academic year and they are now wanting to defer treatment to the following year, please do not provide assurances to these patients that they will be seen the following academic year. Update deferral of treatment in CONTACT NOTES.
CSS will decide as to whether the patient will be maintained as an active patient.

Please make note of any types of transitional treatment (e.g. Provision crowns/Heat-Processed Crown, endodontic treatment with IRM/Cavit or other types of temporary materials in place (e.g. caries control). Once you have completed the list of patients that will be released from treatment at the College, your **PCC** will send a letter to the patient on your behalf once reviewed and notified.

IN-PROCESS TX:

Please print the following report and review all in-process procedures codes that could be generating a balance. If there are any in-process procedure codes, you will have three options to resolve them:

- Treatment will continue during the winter clinical session.

  OR

- If the procedure code is not going to be completed this academic year (September 2026 to May 2027), send correction card form to **PCC LEADS prior to December 4th, 2026,** to suspend the procedure code and review the balance with financial staff.

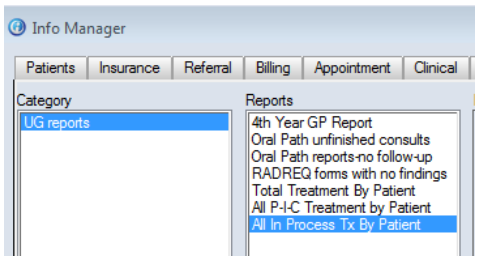
  OR

- If you want to have the procedure code deleted or changed, complete an **axiUm correction card** form prior to **December 4th, 2026.** If the procedure is completed but still in process in axium, have an instructor who oversaw the procedure completed approve the procedure. (Correction card may be needed to back date it.)
- All In-Process codes need to be reviewed, and you need to provide an update on this patient's status at this appointment with PCC Lead.

"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 FORMS, NOTES AND TREATMENT

Please 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.

If you need a procedure code deleted or changed, fill out an **axiUm correction card and action form to PCC LEADS** prior to **December 4th 2026.**

"Unapproved tab"



Go to: **Personal Planner**

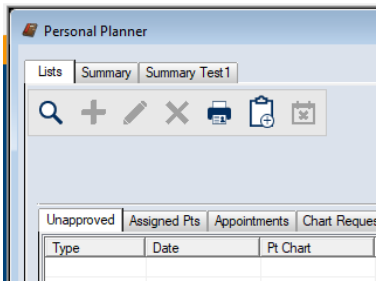
Select: **Lists** tab

Select: **Unapproved** tab



Press: **Search**

Select: ***Print***



The two above reports need to be printed after resolving ALL **in process treatments** and **unapproved treatments**. (Excluding records with your provider chart) The reports should be brought to your meeting with the **PCC LEAD.**

CLEARANCE OF PATIENT BALANCES:

Please ensure that you have completed both IN-PROCESS TX and UNAPPROVED TREATMENT before beginning this section.

You must provide a printout of all patient balances. This must be discussed at a scheduled meeting with Michelle Oshanyk

To print your **PATIENT BALANCES** List:

Go to: I**nfo Manager**

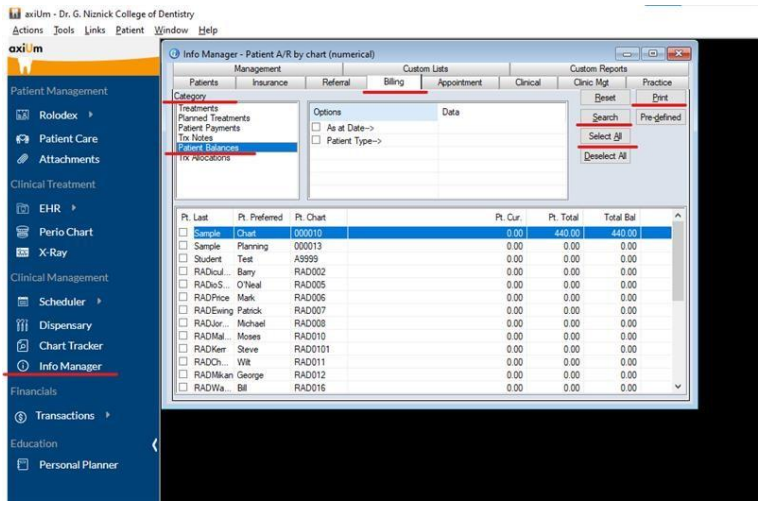
Select: **Billing Tab**

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)**



Discuss Patient Balances with your PCC regarding outstanding patient balances prior to clearance week. Patient Balance process is required to be completed before your meeting with Michelle Oshanyk. Ensure that you have taken all the necessary action to collect the fees for these patients. **Document all correspondences** you have had regarding the collection of fees on the patient **"Contact Notes"** in the patient's **axiUm** record.

When reviewing your patient's account, if you find incorrect entries and need to make necessary adjustments in axiUm or note discrepancies, your **PCC** will review these discrepancies/adjustments with you. They may refer you to your instructor for the completion and grading of procedures. A correction card form submitted to PCC Leads may also be required.

STEP 2: Microsoft Teams Student Sign-up for Individual Appointments

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

D3 Mini Winter Clearance Sign-Up Sheets Final.xlsx

1. **RETURN of DISPENSARY BORROWED ITEMS**
   No Sign-Up Required
   Return all alginate trays, biteforks, or any other dispensary items by **December 4th 2026 at 4:00 pm** to DISPENSARY STAFF.
   After this date, unreturned items will be charged to your axiUm student account.
   Signature for your Dispensary Borrowed Items will take place on December 14th from 8:30 a.m.- 11:30 a.m.

2. **AxiUm CODES and CORRECTION CARDS, IN-PROCESS, UNAPPROVED ITEMS REVIEW**
   See Microsoft Teams for axiUm Review Appointment
   a. Complete all axiUm Correction Card Forms and action to PCC LEADS prior to December 4th 2026.
   b. Print a copy of your In-Process and Unapproved Tx Form and bring these reports to your appointment with the PCC LEAD
   IF YOU DO NOT PRINT YOUR REPORT for your appointment– you will be rescheduled for December 21, 2026

3. **RADIOLOGY/ORAL PATHOLOGY REPORTS**
   No Sign-Up Required
   a. Review outstanding Radiology Forms and Reports and/or Pathology Reports
   b. Pediatric Radiology Reports need to be reviewed and approved by a Pediatric Instructor.
   c. Complete forms and reports prior to appointment.
   d. Bring this printed report to review with either Drs T Nowakowski, A Kim, or V Hunzinger prior to the end of clinic – December 4th.

4. ACCOUNT BALANCES
   See Microsoft Teams for ACCOUNT Appointment
   a. All signatures on the checklist (1-4) must be completed before the Account Balance appointment
   b. Coordinate payment of any outstanding fees associated to your student axiUm account
   c. Payment can be made with any of the PCCs/Reception prior to mini clearance day.
   d. Meet with Michelle Oshanyk to confirm zero balance of Student axiUm Account
   e. Submit Completed Kit Clearance Form with Michelle Oshanyk for review by Dr T Reeve

Student Name: _____ Year: Dentistry 3

Checklist and Signatures

Check	Student Initial	Task	Submit	Signature	Date
☐		**1. Return of Dispensary Loaned Items** **DUE: December 4th at 4:00 pm**	**Larissa or Lemlem** **Main Clinic Dispensary** **Signatures to be obtained on Dec 14th 8:30-11:30 am**		
☐		**2. Radiology & Oral Pathology Reports** **Prior to December 4th, 2026**	**Dr T. Nowakowski** **Dr A Kim** **Dr V Hunzinger**		
☐		**3. Axium Codes Review,** **In process, unapproved items** **December 15, 2026**	**PCC LEADS** **Carley Tokar D123B** **Marta Bhopalsingh D126D**		
☐		**4. Student Account Balances** **Balance Due:** **Paid: Yes No** **Receipt: Yes No** **December 15, 2026**	**Michelle Oshanyk** **Managing Director – D126C**		
☐		**5. Patient Fee Review** Patient Fees Collected **December 15, 2026**	**Michelle Oshanyk** **Managing Director – D126C**		
☐		**6. Winter Clearance Completed** *Note: Signature from Dr. T. Reeve on your attached Clearance form will occur ONLY when all Patient Care and administrative matters have been resolved.*	**Dr. T. Reeve** **Associate Dean, Clinical**		