



**University
of Manitoba**

axiUm Orientation 2026-2027

Abstract

Navigation and Operation for Clinic Practice Management

Clinic Support Services University of Manitoba

Dr. Gerald Niznick College of Dentistry

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axiUm / MiPacs Support

If you require hardware or software assistance, please contact
Dentistry Technology Support <DentIT@umanitoba.ca>
CSS will determine if University IST assistance is required
Staff hours are 8:00 am to 4:30 pm

Provider & Instructor Check List for Clinical Session

Beginning of Session:

- ✓ Intake Form is complete in axiUm; view in > attachments > paper chart > screening package
- ✓ Odontogram is up to date
- ✓ Treatment Plan is completed with phasing and accepted/signed by the patient
- ✓ EHR accurately reflects the approved Treatment Plan
- ✓ Medical History has been taken and updated on patient's EHR
- ✓ Blood Pressure readings are entered in the Medical History Form

During Session:

- ✓ Radiology Report Finding Form must be completed at the session when radiographs were taken

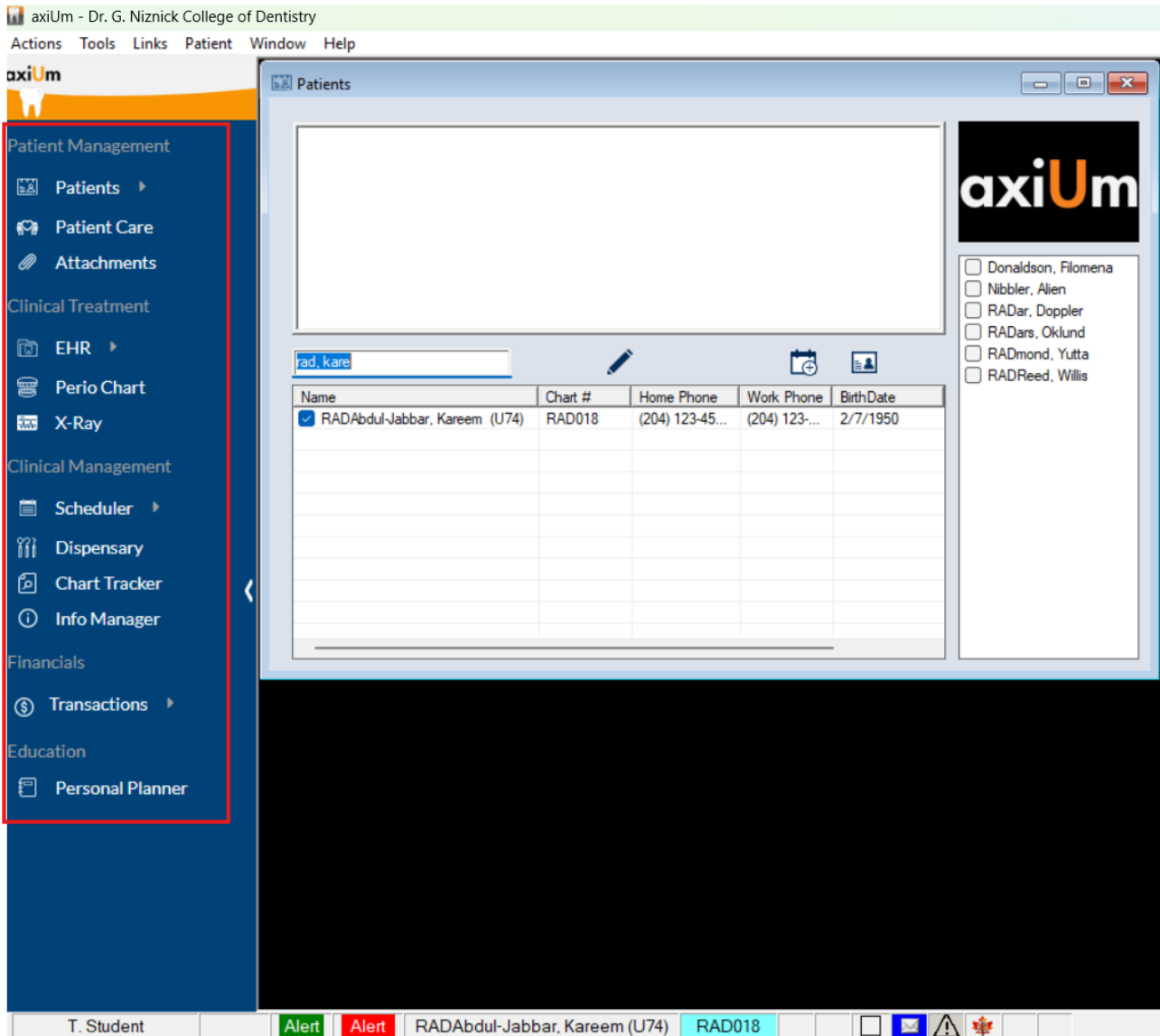
End of Session:

- ✓ Entry and approval of the following:
All EHR forms: Medical History, Radiology Request, Oral Pathology and General Referral Forms, updates and any other forms completed during session
- ✓ Forms actioned to correct messaging group
- ✓ Clinical Notes are **mandatory** for each session
- ✓ To generate a grade card a procedure code must be set to In Process or Complete
- ✓ All treatment codes must be correct before getting instructor's swipe
- ✓ Grading Window selected must reflect discipline of session

Patient Check out:

- ✓ A procedure code must be swiped before checking out patient at reception
- ✓ To ensure patient privacy, discuss details of treatment and costs in your clinic unit before escorting to reception

Welcome Screen



Module List

Patients: search for patients

Patient Care: not used

Attachments: documents related to patient

Electronic Health Record: patient chart

Perio Chart

X-Ray: Digital Radiograph - MiPacs

Scheduler: managing appointments

Dispensary: not used

Chart Tracking: not used

Info Manager: reporting list

Transactions: financial records

Personal Planner: organizational reports related to assigned patient list

Taskbar



User T. Student

Office Alerts **Alert** (reference Patient Card page 16-17)

Medical Alerts **Alert** (reference Patient Card page 16-17)

Patient Name RADAbdul-Jabbar, Kareem (U74) (U74: Sex and Age)

Chart Number RAD018 (Turquoise indicates pending approval(s))

Messenger system of axiUm   (blue indicates unread messages & red indicates high-priority messages) Used for patient care related communication

Government Insurance   

Modules

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Actions Tools Links Patient Window Help

axiUm

Patient Management

- Patients**
- Patient Care
- Attachments

Clinical Treatment

- EHR
- Perio Chart
- X-Ray

Clinical Management

- Scheduler
- Dispensary
- Chart Tracker
- Info Manager

Financials

- Transactions

Education

- Personal Planner

Patients

RADAbdul-Jabbar, Kareem
12345 Dental Way
Winnipeg, MB, R3Q2E2
H : (204)123-4567 W : (204)123-4567
Age : 74, Unknown
Patient Balance: 0.00

RAD018
Active
Virtual Patient-data only temp
H - DH New, PSR4
A - Student, Test

rad, kar

Name	Chart #	Home Phone	Work Phone	BirthDate
☒ RADAbdul-Jabbar, Kareem (U74)	RAD018	(204) 123-45...	(204) 123-...	2/7/1950

T. Student **Alert** **Alert** RADAbdul-Jabbar, Kareem (U74) **RAD018**   

Patients

Select Patients icon on top left of screen to search your patient chart

- Type patient name or chart number into search bar
- Select appropriate header based on search type (Name or Chart #)
- Select patient (highlighted)
- Ensure correct patient is selected (bottom taskbar)
 - Display above search bar includes:
 - Patient name and demographics
 - Chart #
 - Status
 - Assigned providers (A-Dental student, H-Dental hygiene student, D-Grad resident)

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Patient Management

- Patients
- Patient Care
- Attachments

Clinical Treatment

- EHR
- Perio Chart
- X-Ray

Clinical Management

- Scheduler
- Dispensary
- Chart Tracker
- Info Manager

Financials

- Transactions

Education

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Patients

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12345 Dental Way
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H : (204)123-4567 W : (204)123-4567
Age : 74, Unknown
Patient Balance: 0.00

RAD018

Active
Virtual Patient-data only temp

rad, ka

Name	Chart #	Home Phone	Work Phone	Birth Date
☒ RADAbdul-Jabbar, Kareem (U74)	RAD018	(204) 123-45...	(204) 123-...	2/7/1950

Patient Card - RADAbdul-Jabbar, Kareem (RAD018)

Chart IN

Pt Type Virtual Patient-data only temp

RADAbdul-Jabbar, Kareem
02/07/1950
12345 Dental Way

Winnipeg, MB
R3Q2E2

*Home # (204) 123-4567
Work # (204) 123-4567
Mobile # (204) 806-1510
Other # (204) 123-4567
Other Loc
Time

Chart RAD018
Area
Status Active
ID.
Provider
Access Free

Insurance CDCP

Employer

Subscriber # 12345

Group 333333

Holder RADAbdul-Jabbar, Kareem

Coverage CDCP 100%

CDCP

CDCP

12345

333333

RADAbdul-Jabbar, Kareem

RADAbdul-Jabbar, Kareem

Patient's Physician

Emergency Contact

RADAbdul-James, Tris

(204) 123-4567

Relation Daughter

Manager

Last Visit 05/06/2025

Last Recall 15/05/2025

Next Recall 01/08/2025

Next Appt N/A

Last Stmt. 07/07/2023

Alert	4LM	1COLL	1ACCT	5PM		Current	> 30	> 60	> 90	> 120	Total
Office	2DENA	5GPERC	PROSP	5GPERS	4RDHTX	Patient	0.00	0.00	0.00	0.00	0.00
Custom	FRENCH	EMVOTX				Pmt Plan	0.00	0.00	0.00	0.00	0.00
Custom						Insurance	0.00	0.00	0.00	0.00	0.00
						Total Due	0.00	Next Fee	N/A	0.00	Now Due

Type	Date	Time	Clinic	Provider	Provider Name	Code	Reason	Wait List
Delet...	10/01/...	01:00 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...		No
Canc...	10/01/...	01:30 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	
Delet...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	treatment oper...	No
Canc...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	

To see full details and demographics of patient, select patient card icon



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Actions Tools Links Patient Window Help

axiUm

Patient Management

- Patients
- Patient Care
- Attachments**

Clinical Treatment

- EHR
- Perio Chart
- X-Ray

Clinical Management

- Scheduler
- Dispensary
- Chart Tracker
- Info Manager

Financials

- Transactions

Education

- Personal Planner

Attachments/Consents - RADAbdul-Jabbar, Kareem (RAD018)

Release of patient information consent on file ☐ Show Deleted ☐

Section

- Consents (70)
- Documents - Outgoing...
- Documents - Incomin...
- Financials (47)
- Letters (Form) (15)
- Medical Consults
- I.V. Sedation Record
- DSM
- Endo
- Grad Perio (1)
- Implant Info
- Oral Pathology rept (5)
- Oral Radiology rpt (1)
- Referrals (5)
- Photos (3)
- Fee Waiver
- Insurance (2)
- Voicemail
- Incident Reports
- Notes

Patient Consents (69) Internal Consents External Consents (1) RELEASE PHI FIN GUARANTOR

Date	Consent C...	Description	File Type	Denied	Expiry Date
07/03/2025		Treatment Plan Contract	pdf		
03/09/2024	IMPCON	Implant Consent To Treatment	pdf	Y	
17/05/2024	PTCSWV	PATIENT CONSENT & WAI...	pdf		
15/09/2023		Treatment Plan Contract	pdf		
06/09/2023	IMPCON	Implant Consent To Treatment	pdf		
05/09/2023	IMPCON	Implant Consent To Treatment	pdf		
01/09/2023		Treatment Plan Contract	pdf		
22/06/2023		Treatment Plan Contract	pdf		
17/04/2023	PTSUTQ	PATIENT SUITABILITY CO...	pdf		
04/11/2022	IMPCON	Implant Consent To Treatment	pdf		
26/09/2022		Treatment Plan Contract	pdf		
26/09/2022		Treatment Plan Contract	pdf		
26/09/2022		Treatment Plan Contract	pdf		
20/09/2022	IMPCON	Implant Consent To Treatment	pdf		
14/09/2022	IMPCON	Implant Consent To Treatment	pdf		
03/05/2022	IMPCON	Implant Consent To Treatment	pdf		
23/03/2022	IMPCON	Implant Consent To Treatment	pdf		
02/03/2022		Treatment Plan Contract	pdf		

T. Student Alert Alert RADAbdul-Jabbar, Kareem (U74) RAD018

Attachments

Select Attachments icon on left of screen to view documents

→ Select appropriate section

Consents: signed treatment plans, release of personal health information, other consents

Documents-Outgoing: patient correspondence

Medical Consults: correspondence with physician

Endo: external referrals to Endodontist, treatment reports

Referrals: limited referrals from Private Practice

Fee Waiver: funding request documents

Insurance: insurance letters

Patient Chart Info: patient intake forms including consents

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Actions Tools Links Patient Window Help

axiUm

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EHR - Chart / Tx History - RADAbdul-Jabbar, Kareem (RAD018)

Alerts Problems Objectives

Medical Alerts:
Allergy to Penicillin
Atrial Fibrillation
Bleeding Disorder- see chart
High Cholesterol
History of Angina Pectoris
History of Autism
History of Rheumatic Heart Disease; Proph AB Req'd; Fc
History of thyroid dysfunction- see chart
Organic Heart Murmur (Requires Proph AB/Current AHA
Type I Diabetes (Insulin-Dependent /IDDM)

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Appr. User	Description
14/11/24		52302			P	Required *	0	K. Munoz	Acrylic PLD With Clasps-LAB
14/11/24		52302.1			P		0	K. Munoz	Acrylic PL Dent/Clasp - Tx. Plan
14/11/24		52302.1			P		0	K. Munoz	Acrylic PL Dent/Clasp - Tx. Plan
14/11/24		52302.2			P		0	K. Munoz	Acrylic PL Dent/Clasp - Final Impress/Lab
14/11/24		52302.2			P		0	K. Munoz	Acrylic PL Dent/Clasp - Final Impress/Lab
14/11/24		52302.3			P		0	K. Munoz	Acrylic PL Dent/Clasp - Tx. in progress
14/11/24		52302.3			P		0	K. Munoz	Acrylic PL Dent/Clasp - Tx. in progress
14/11/24		52302.4			P		0	K. Munoz	Acrylic PL Dent/Clasp - Delivery
14/11/24		52302.4			P		0	K. Munoz	Acrylic PL Dent/Clasp - Delivery
14/11/24		L51101			P	Not Req'd *	0	K. Munoz	Lab - Complete Max. Dent
19/12/24		01202			P	Not Req'd *	0	L. Plawuck	Recall Exam
19/12/24	R. Todesca	L14611			P	Not Req'd *	0	R. Todesca	Lab - Bruxism appl.
07/03/25		0100.0			P	Not Req'd *	0	M. Bhopals	C&B Long Term Recall
07/03/25	R. Theveno	0100.A			P	Not Req'd *	0	M. Bhopals	Assist (non-surgical)
07/03/25		23311	15	O	P	Not Req'd *	0	M. Bhopals	Perm Premolar Comp/GI 15

Load All
Site: All
From: 06/06/2015
To: 06/06/2025
Views:
Station View
Standard view (all txs)
Pre-existing only
Planned only
Planned & In-Process
Completed only

T. Student Alert Alert RADAbdul-Jabbar, Kareem (U74) RAD018

EHR

Select EHR icon on left of screen to view Electronic Health Record

EHR displays:

- Odontogram
- Patient Alerts (Medical, Needs, Problems and Objectives)
- Tx History
- Tx Plans
- Forms
- Attachments/Consents
- Perio
- Chart Add

Perio Chart (New patient exam - 14/03/2025) - RADAbdul-Jabbar, Kareem (RAD018)

Maxillary Unapproved

PD
FGM
CAL
BOP
Furc Inv
MG
Mobility

Buccal

Lingual

Plaque
PD
FGM
CAL
BOP
Furc Inv
SUP

T. Student

Alert Alert RADAbdul-Jabbar, Kareem (U74) RAD018

Perio Chart

Select Perio Chart icon on left of screen to view perio charting

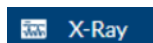
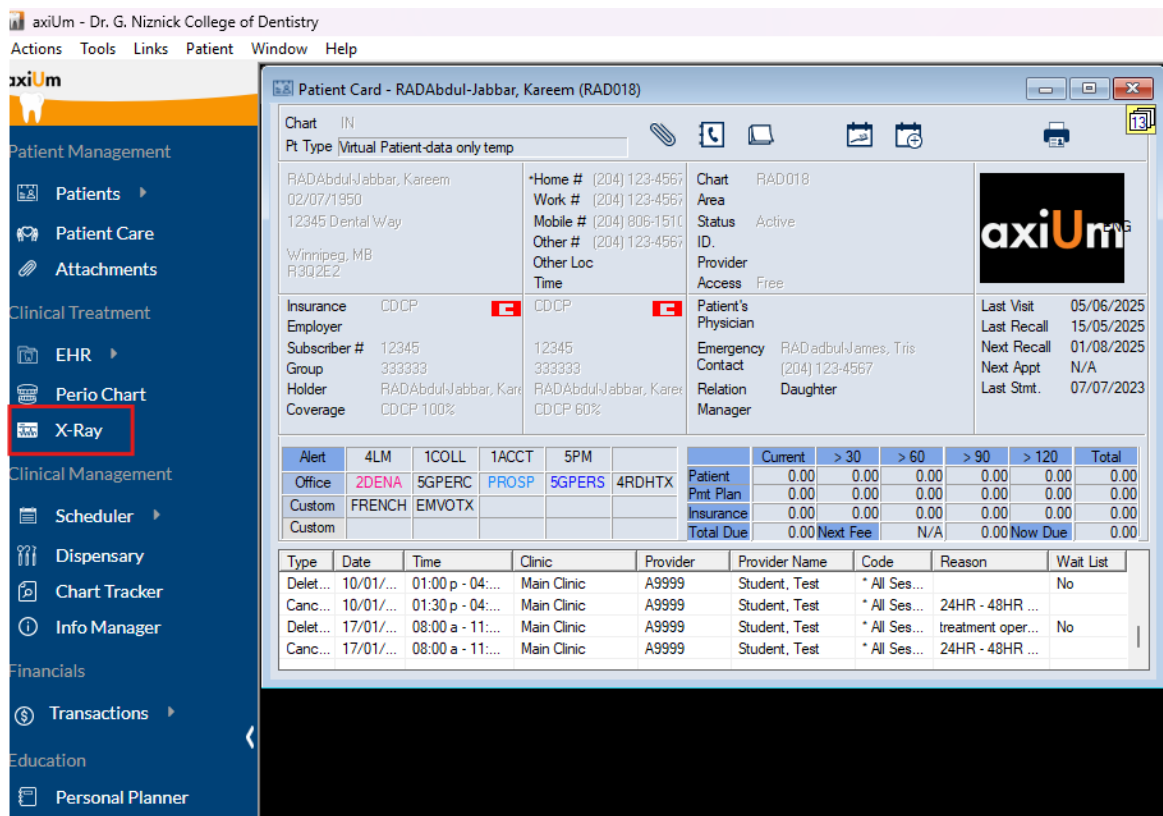
Left side of perio chart:

Current view selected (Maxillary or Mandibular)

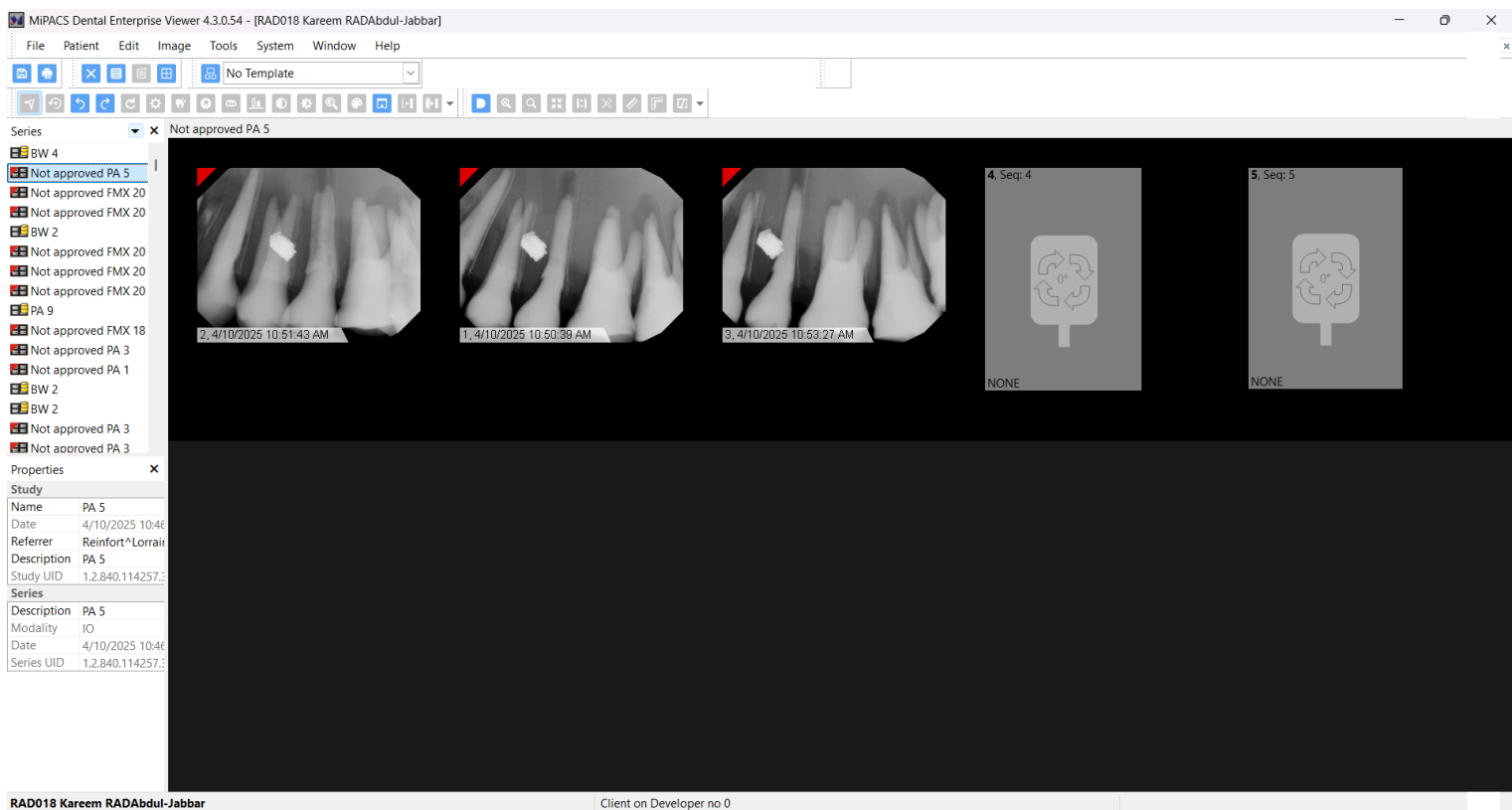
Buccal and lingual areas shown

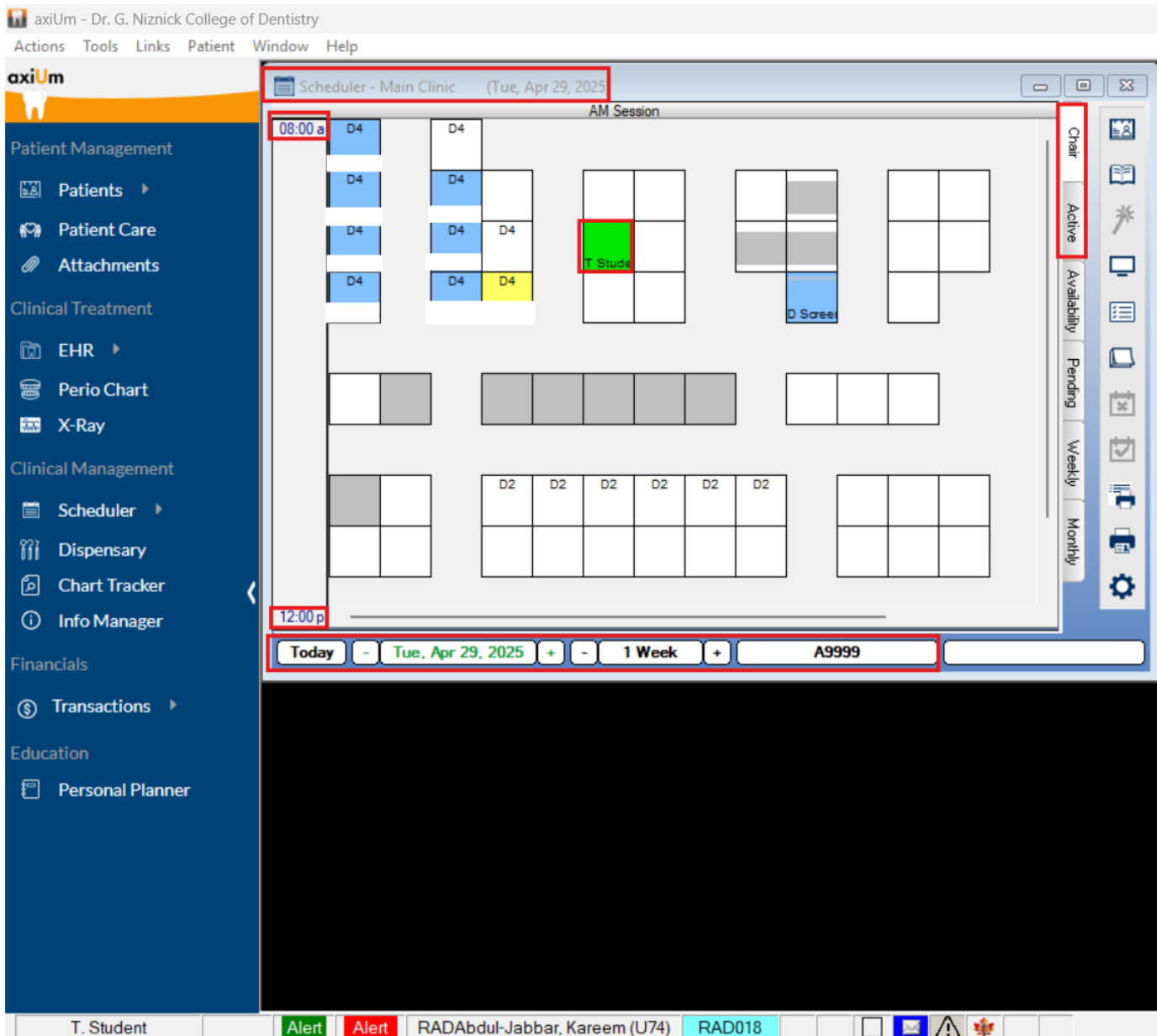
Abbreviation of conditions:

BOP	Bleeding on probing
CAL	Attachment level
FGM	Free Gingival Margin
FURCA	Furcation Involvement
MAG	Minimal Attached Gingiva
MOB	Mobility
PD	Probing Depth
PLAQUE	Plaque



Select X-Ray icon on left of screen to open MiPacs and view X-Rays





Scheduler

Select Scheduler icon on left of screen to view schedule and book appointments

Top of screen: Current Book and date

Left side of screen: AM/PM session designated by 8:00 or 12:00

Right side of screen: Chair view or Active view tabs

Bottom of screen:

Today: Select to resume to current date

Date: Displays date selected (Tue, Apr 29, 2025) Navigate day/day using +/-

1 Week: Navigate week/week using +/-

Provider: Displays current user (A9999)

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Patient Management

Patients

Patient Care

Attachments

Clinical Treatment

EHR

Perio Chart

X-Ray

Clinical Management

Scheduler

Dispensary

Chart Tracker

Info Manager

Financials

Transactions

Education

Personal Planner

Transactions - RADAbdul-Jabbar, Kareem (RAD018)

General

Treatment

Notes

RADAbdul-Jabbar, Kareem (RAD018)

Guarantor

Emergency Manager

Patient Type

RADAbdul-Jabbar, Kareem

RADAbdul-James, Tina

Virtual Patient-data only temp

CDCP

CDCP

Last Visit

Last Recall

Next Recall

Next Appt

Last Stmt.

05/08/2025

15/05/2025

01/08/2025

Pending

07/07/2025

axiUm

Alert	ALN	SGPERC	PROSP	SPM	4RDHTX
Office	SIENIA	SGPERC	PROSP	SPM	4RDHTX
Custom	FRENCH	EMVOTX			
Custom					

	Current	> 30	> 60	> 90	> 120	Total
Patient	0.00	0.00	0.00	0.00	0.00	0.00
Print Plan	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00
Total Due	0.00	Next Fee	11/94	0.00	Now Due	0.00

Transaction History

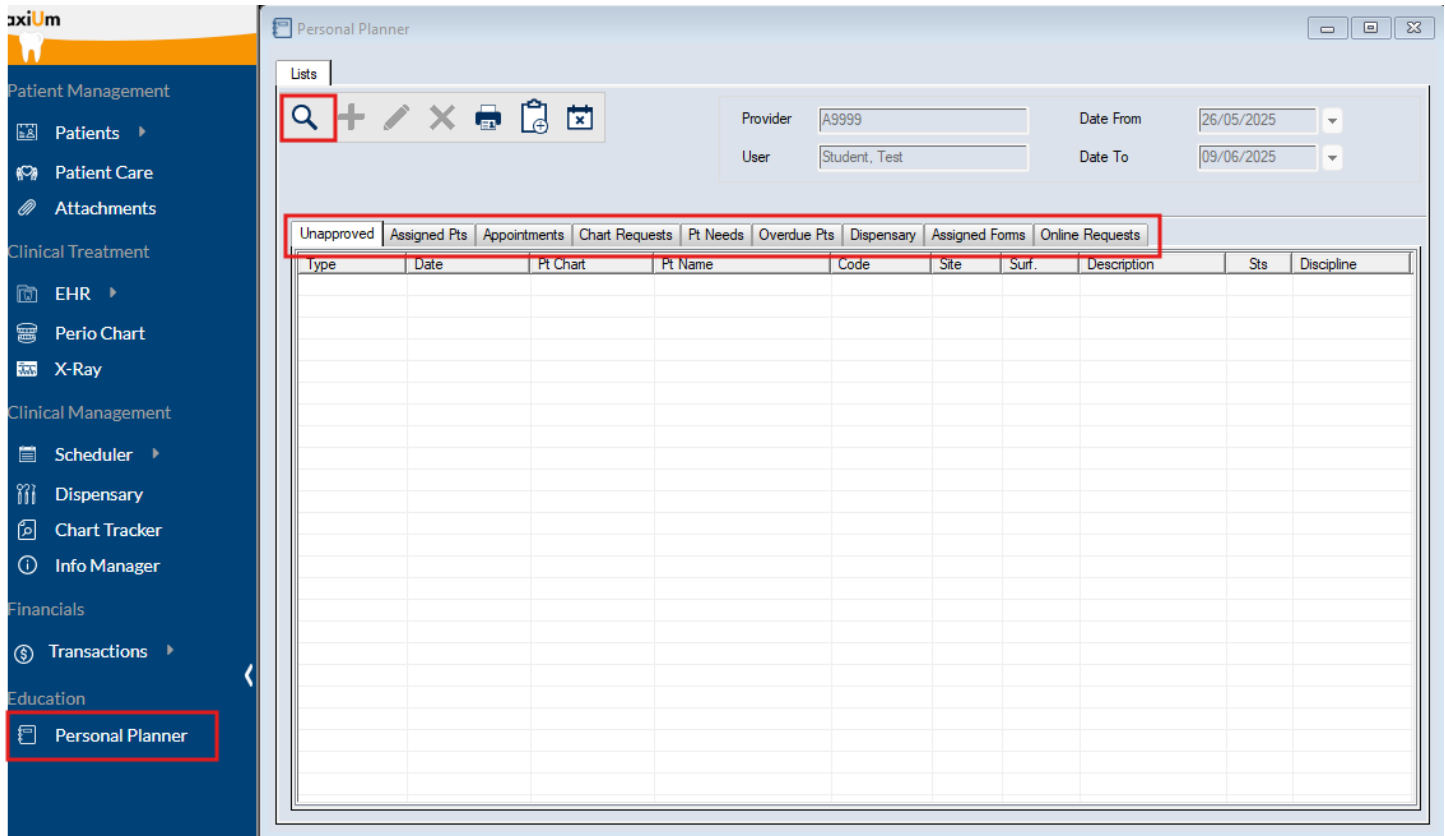
Pending

Unapproved

Trx.#	Date	Name	Prov.	Code	Site	Description	Patient	Insurance	Total	Prov./User	Stat.	Tx/Chg Practice	
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				
c>	1091602	19/12/2024	Kareem	DR016	14901	Sleep Apnea Appliance ...	0.00	0.00	0.00	Todescan (Do not ...	C	Dr. G. Niznick College of Dentist...	
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				
c>	1099634	19/02/2025	Kareem	DPER2601	11111	Scaling 1 Unit	0.00	0.00	0.00	Dhalla, Suraya	C	Dr. Sam Borden Periodontology...	
						Claim Total	0.00	0.00	0.00				
c>	1099648	19/02/2025	Kareem	DPER2601	11111	Scaling 1 Unit	0.00	0.00	0.00	Dhalla, Suraya	C	Dr. Sam Borden Periodontology...	
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				
c>	1107825	19/02/2025	Kareem	DPER2601	11115	Scaling 5 Unit	0.00	0.00	0.00	Dhalla, Suraya	C	Dr. Sam Borden Periodontology...	
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				
p>	305129	19/02/2025	Kareem		DD	Direct Deposit	-100.00	0.00	-100.00	Duarte-Trozzo, Celia			
p>	305130	19/02/2025	Kareem		V	Visa Payment	-285.73	0.00	-285.73	Janis, Christy			
a>	268824	19/02/2025	Kareem		REV	Payment Reversal	285.73	0.00	285.73	Duarte-Trozzo, Celia			
a>	268825	19/02/2025	Kareem		REV	Payment Reversal	100.00	0.00	100.00	Duarte-Trozzo, Celia			
						Running Balance	0.00	0.00	0.00				
c>	1109878	23/05/2025	Kareem	DR022	51101	Complete Max Denture, ...	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...	
c>	1109878	23/05/2025	Kareem	DR022	51101.1	CUD - Tx. Plan	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...	
						Claim Total	0.00	0.00	0.00				
c>	1109879	23/05/2025	Kareem	A2503	71101	15	Extraction Single Tooth	0.00	0.00	0.00	Baranjouk, Nestor	C	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				
c>	1110364	05/06/2025	Kareem	A2518	27201	17	All Ceramic Crown (AC...	0.00	0.00	0.00	Randhawa, Navnoor	C	Dr. G. Niznick College of Dentist...
c>	1110364	05/06/2025	Kareem	DR022	L27201	17	Lab - Porcelain Crown	0.00	0.00	0.00	Reeve - Associate ...	C	Dr. G. Niznick College of Dentist...
c>	1110364	05/06/2025	Kareem	DR022	51101.2	CUD - Final Impression...	0.00	0.00	0.00	Reeve - Associate ...	C	Dr. G. Niznick College of Dentist...	
						Claim Total	0.00	0.00	0.00				
c>	1110365	05/06/2025	Kareem	DR022	51101	Complete Max Denture, ...	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...	
						Claim Total	0.00	0.00	0.00				
						Running Balance	0.00	0.00	0.00				

Select Transactions icon on left of screen to view outstanding balances and transaction history

13



Personal Planner

Select Personal Planner icon left of screen to manage patient assignment and patient forms

→ Select appropriate tab and select search  to populate list

Unapproved: All Treatment, Notes and Forms that have not been approved (swiped) by an instructor

Assigned Pts: All assigned patients

Appointments: Appointment history

Pt Needs: Submit a Pt Needs Request for a specific treatment requirement

Personal Planner

Lists

Provider: A9999 Date From: 26/05/2025

User: Student, Test Date To: 09/06/2025

☒ Include Group Assignments ☐ Include User's Previous Assignments ☒ Show Open Forms Only

Unapproved Assigned Pts Appointments Chart Requests Pt Needs Overdue Pts Dispensary **Assigned Forms** Online Requests

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	371476	31/08/2022	Radiology Request Form	REQ	Student, Test
RAD033	Bird, Lary	371474	31/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371466	31/08/2022	General Referral Form	OPEN	Student, Test
RAD033	Bird, Lary	371427	30/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	371426	30/08/2022	O Path Consult Referral&Report	REF	Student, Test
RAD033	Bird, Lary	371380	30/08/2022	Radiology Request Form	REQ	Student, Test
RAD033	Bird, Lary	371234	29/08/2022	Radiology Request Form	REQ	Student, Test
RAD033	Bird, Lary	371149	25/08/2022	Radiology Request Form	REQ	Student, Test
RAD033	Bird, Lary	371108	25/08/2022	Axiom Correction Card Form		Student, Test
RAD033	Bird, Lary	371106	25/08/2022	DH Pt. Transfer/Disp. Form		Student, Test
RAD033	Bird, Lary	370765	22/08/2022	Axiom Correction Card Form	OPEN	Student, Test
RAD033	Bird, Lary	370720	22/08/2022	DH Pt. Transfer/Disp. Form		Student, Test
T0008	Branigan, Zapp	77695	13/08/2013	Radiology Request Form	REQ	Student, Test
T0008	Branigan, Zapp	77694	13/08/2013	Radiology Request Form	REQ	Student, Test
T0008	Branigan, Zapp	76292	06/06/2013	Radiology Request Form		Student, Test
	Student,	485201	06/01/2025	DH New Pt. Req. Form	OPEN	Student, Test
	Student,	462953	21/08/2024	DH New Pt. Req. Form	OPEN	Student, Test
	Student,	439956	05/01/2024	DH New Pt. Req. Form	OPEN	Student, Test
	Student,	439678	04/01/2024	DH New Pt. Req. Form	OPEN	Student, Test
	Student,	418116	23/08/2023	DH New Pt. Req. Form		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

Assigned Forms: Review forms monthly. Forms still assigned to you and/or forms with a status “open” require your attention.

- **axiUm Correction Card Form:** Once completed, action to PCC Leads messaging group
- **Radiology Request Form:** Once all findings recorded, update status from REQ (Radiographs requested) to FIN (Finished entering findings) remove yourself from user
- **General Referral Form:** Once completed and approved by instructor, action to Associate Dean
- **O Path Consult Referral & Report:** Once completed and approved by instructor, action to Oral Pathology Staff messaging group

See page 50-52 on how to “Action/Running man” forms

Patient Card

axiUm - Dr. G. Niznick College of Dentistry
Actions Tools Links Patient Window Help

axiUm

Patient Management

- Patients
- Patient Care
- Attachments

Clinical Treatment

- EHR
- Perio Chart
- X-Ray

Clinical Management

- Scheduler
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Education

- Personal Planner

Patients

RADAbdul-Jabbar, Kareem
12345 Dental Way
Winnipeg, MB, R3Q2E2
H : (204)123-4567 W : (204)123-4567
Age : 74, Unknown
Patient Balance: 0.00

RAD018
Active
Virtual Patient-data only temp

rad, ka

Name	Chart #	Home Phone	Work Phone	Birth Date
RADAbdul-Jabbar, Kareem (U74)	RAD018	(204) 123-45...	(204) 123-...	2/7/1950

Patient Card - RADAbdul-Jabbar, Kareem (RAD018)

Chart IN
Pt Type Virtual Patient-data only temp

RADAbdul-Jabbar, Kareem
02/07/1950
12345 Dental Way
Winnipeg, MB
R3Q2E2

Home # (204) 123-4567
Work # (204) 123-4567
Mobile # (204) 806-1510
Other # (204) 123-4567
Other Loc
Time

Chart RAD018
Area
Status Active
ID.
Provider
Access Free

Insurance CDCP
Employer
Subscriber # 12345
Group 333333
Holder RADAbdul-Jabbar, Kareem
Coverage CDCP 100%

CDP
CDP
CDP 60%

Emergency Contact
RAD abdul-James, Tris
(204) 123-4567
Relation Daughter
Manager

Last Visit 05/06/2025
Last Recall 15/05/2025
Next Recall 01/08/2025
Next Appt N/A
Last Stmt. 07/07/2023

Alert	4LM	1COLL	1ACCT	5PM		Current	> 30	> 60	> 90	> 120	Total
Office	2DENA	5GPERC	PROSP	5GPERS	4RDHTX	0.00	0.00	0.00	0.00	0.00	0.00
Custom	FRENCH	EMVOTX				0.00	0.00	0.00	0.00	0.00	0.00
Custom						0.00	0.00	0.00	0.00	0.00	0.00
						0.00	Next Fee	N/A	0.00	Now Due	0.00

Type	Date	Time	Clinic	Provider	Provider Name	Code	Reason	Wait List
Delet...	10/01/...	01:00 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...		No
Canc...	10/01/...	01:30 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	
Delet...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	treatment oper...	No
Canc...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	

Select the Patient Card icon



Patient Card - RADAbdul-Jabbar, Kareem (RAD018)

Chart IN
Pt Type Virtual Patient-data only temp

RADAbdul-Jabbar, Kareem 02/07/1950 12345 Dental Way Winnipeg, MB R3Q2E2		*Home # (204) 123-4567 Work # (204) 123-4567 Mobile # (204) 806-1510 Other # (204) 123-4567 Other Loc Time		Chart RAD018 Area Status Active ID. Provider Access Free			
Insurance CDCP Employer Subscriber # 12345 Group 333333 Holder RADAbdul-Jabbar, Kareem Coverage CDCP 100%		CDCP 12345 333333 RADAbdul-Jabbar, Kareem CDCP 60%		Patient's Physician Emergency RADadbul-James, Tris Contact (204) 123-4567 Relation Daughter Manager		Last Visit 05/06/2025 Last Recall 15/05/2025 Next Recall 01/08/2025 Next Appt N/A Last Stmt. 07/07/2023	

Alert	4LM	5PM	5PM	4RDHTX	Current	> 30	> 60	> 90	> 120	Total
Office	2DENA	5GPERC	PROSP	5GPERS	0.00	0.00	0.00	0.00	0.00	0.00
Custom	FRENCH	EMVOTX			0.00	0.00	0.00	0.00	0.00	0.00
Custom					0.00	0.00	0.00	0.00	0.00	0.00
					Total Due	0.00	Next Fee	N/A	0.00	Now Due

Type	Date	Time	Clinic	Provider	Provider Name	Code	Reason	Wait List
Delet...	10/01/...	01:00 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...		No
Canc...	10/01/...	01:30 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	
Delet...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	treatment oper...	No
Canc...	17/01/...	08:00 a - 11:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	

Overview of patient card

- Patient demographics
- Insurance details (check for SAP, NIHB, or CDCP)
- Office alert details (hover over office code for description)

Pay close attention to:

Alert

- **2MCI** - Medical consult Incomplete
- **1ACCTU** – Account Uncollectable SEE ADMIN STAFF
- **1COLL** – Sent to collections
- **PMGMT** – Patient Management SEE ASSOCIATE DEAN

Office

- **5GPERS** - Grad Perio Scaling
- **LTDTX** - Limited Treatment
- **PROSP** - Grad Prostho Patient

Custom

- Can display preferred Language

The lower section of the **Patient Card** provides the patient's appointment history

Type

- Booked
- Deleted
- Cancelled
- Failed

Reason

- 24HR – 48HR - Insufficient notice
- Greater than 48HR - Sufficient notice

Contact Notes

Patient Card - RADAbdulJabbar, Kareem (RAD018)

Chart IN
Pt Type Virtual Patient-data only temp

RADAbdulJabbar, Kareem
02/07/1950
12345 Dental Way
Winnipeg, MB
R3Q2E2

Home # (204) 123-4567
Work # (204) 123-4567
Mobile # (204) 806-1510
Other # (204) 123-4567
Other Loc Time

Insurance CDDP CDDP
Employer 12345 12345
Subscriber # 333333 333333
Group 333333 333333
Holder RADAbdulJabbar, Kareem RADAbdulJabbar, Kareem
Coverage CDDP 100% CDDP 60%

Alert 4LM 1COLL 1ACCT 5PM
Office 2DENA 5GPERC PROSP 5GPERS 4RDHTX
Custom FRENCH EMVOTX
Custom

Patient Contact Notes

Contact Note
Contact Date 11/06/2025 Contact Time 09:38 AM Contact User T. Student
Code
Note test note

T	Contact Date	Contact Time	Note	Contact User
	21/08/2023	01:19 PM	phone left to book for perio exam	T. Student
	23/08/2023	09:16 AM	phone patient to book for scaling	T. Student
	23/08/2023	01:18 PM	test	T. Student
	24/08/2023	01:20 PM	test	T. Student
	29/08/2023	01:21 PM	phone left message to book for treatment plan	T. Student
	30/08/2023	09:25 AM	phone patient left message to book for treatment ...	T. Student
	30/08/2023	01:19 PM	phone left message to book treatment plan appoi...	T. Student
	31/08/2023	09:22 AM	phone left message to book treatment plan	T. Student
	28/11/2023	01:33 PM	phone left message to book	T. Student
	28/11/2023	01:35 PM	phone left to book	T. Student
	05/12/2023	01:53 PM	phoned left message to book appt second	D. Salas Chavez
	04/01/2024	09:24 AM	phone left message to book	T. Student
	05/01/2024	09:19 AM	phone patient left message	T. Student
	08/01/2024	08:50 AM	phone patient left message to book	T. Student
	09/01/2024	08:53 AM	phone left message	T. Student
	13/03/2024	01:35 PM	Phase 4 treatment (dental hygiene maintenance) ...	T. Rodriguez (PC...
	09/05/2024	03:26 PM	TEST	T. Rodriguez (PC...
	11/06/2024	01:51 PM	phone left message to book	T. Student
	12/08/2024	01:50 PM	called patient to book first attempt	T. Student
	12/08/2024	01:55 PM	called patient. 1st attempt	Y. Omoteso
	19/08/2024	09:12 AM	phone left to book	T. Student
	19/08/2024	10:40 AM	phone patient to book left a message	T. Student
	20/08/2024	01:14 PM	test	T. Student
	21/08/2024	09:17 AM	left message to book	T. Student
	21/08/2024	01:17 PM	called patient left message to book	T. Student
	27/08/2024	01:20 PM	phone left message to book	T. Student
	28/08/2024	09:17 AM	phone left message to book	T. Student
	28/08/2024	01:18 PM	called patient left a message	T. Student
	29/08/2024	09:21 AM	phone left message to book a patient	T. Student
	10/09/2024	01:14 PM	phone left message to book	T. Student
	26/11/2024	01:18 PM	phone left to book	T. Student

* Contact Note added from Personal Planner - Online Requests

→ Select the Contact note icon



→ Type your detailed communication in the note field

→ Once note completed, select add new record



All communication with your patient (Phone, text, & email) must be documented at the time of interaction in contact notes. These entries are a part of a legal document

A note cannot be deleted or modified. Correction card is required to request a deletion

Electronic Health Record

EHR

Odontogram

Must accurately reflect patient's current dentition, update with any changes/new findings

→ Select Tooth Number and Right Click to:

Enter/Update

- Missing teeth
- Existing condition
- Age change (primary/permanent)
- Tooth condition
- Tooth details

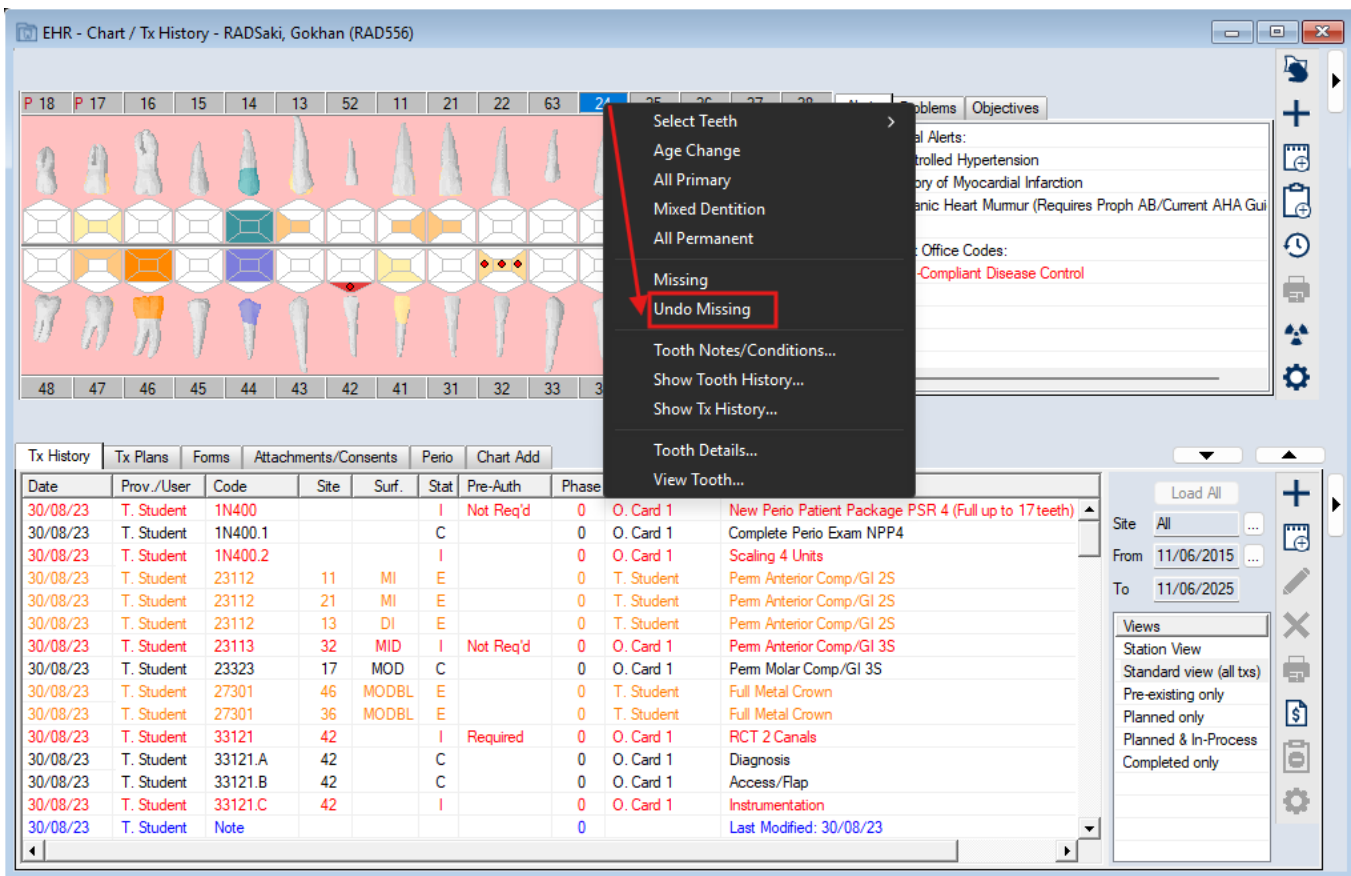
View

- Tooth history
- Tooth notes/conditions

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Description
30/08/23	T. Student	1N400			I	Not Req'd	0	O. Card 1 New Perio Patient Package PSR 4 (Full up to 17teeth)
30/08/23	T. Student	1N400.1			C		0	O. Card 1 Complete Perio Exam NPP4
30/08/23	T. Student	1N400.2			I		0	O. Card 1 Scaling 4 Units
30/08/23	T. Student	23112	11	MI	E		0	T. Student Perm Anterior Comp/GI 2S
30/08/23	T. Student	23112	21	MI	E		0	T. Student Perm Anterior Comp/GI 2S
30/08/23	T. Student	23112	13	DI	E		0	T. Student Perm Anterior Comp/GI 2S
30/08/23	T. Student	23113	32	MID	I	Not Req'd	0	O. Card 1 Perm Anterior Comp/GI 3S
30/08/23	T. Student	23323	17	MOD	C		0	O. Card 1 Perm Molar Comp/GI 3S
30/08/23	T. Student	27301	46	MODBL	E		0	T. Student Full Metal Crown
30/08/23	T. Student	27301	36	MODBL	E		0	T. Student Full Metal Crown
30/08/23	T. Student	33121	42		I	Required	0	O. Card 1 RCT 2 Canals
30/08/23	T. Student	33121.A	42		C		0	O. Card 1 Diagnosis
30/08/23	T. Student	33121.B	42		C		0	O. Card 1 Access/Flap
30/08/23	T. Student	33121.C	42		I		0	O. Card 1 Instrumentation
30/08/23	T. Student	Note					0	Last Modified: 30/08/23

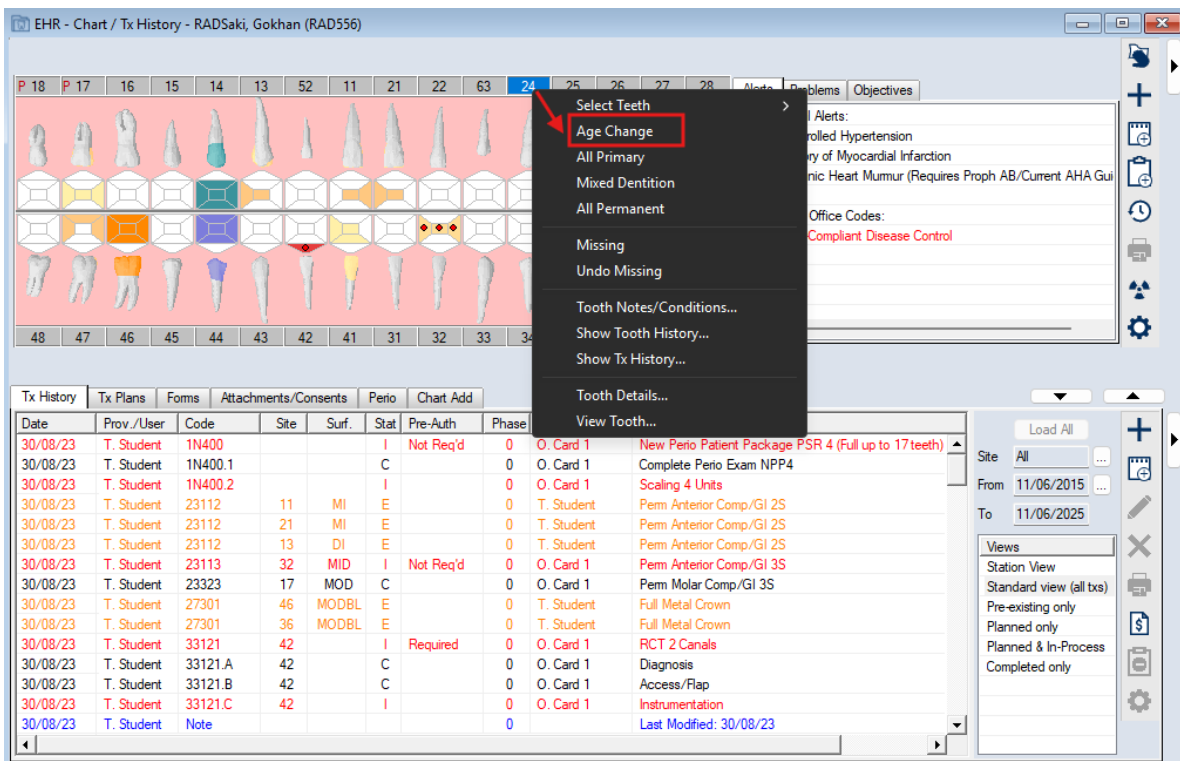
To indicate a tooth is missing:

→ "Right click" on tooth number and select Missing



If tooth was entered Missing incorrectly:

→ “Right click” on tooth number and select Undo Missing



If patient presents with mixed dentition:

→ “Right click” on tooth number and select Age Change (tooth 24 updated to tooth 64)

Medical History Report/Form

EHR - Chart / Forms - RADRedick, J.J. (RAD112)

P 18 17 P 16 P 55 P 54 P 53 N P 12 11 21 22 N 63 64 N 65 26 27 28

Alerts Problems Objectives

Medical Alerts:
Functional Heart Murmur (No AB required)
History of Rheumatic Heart Disease: Proph AB Req'd; Follow

Patient Alerts:
A.M. Appt. Only/Preferred

Tx History Tx Plans **Forms** Attachments/Consents Perio Chart Add

Change Date 01/02/2021 Last Appr. Waller (Administrator), I Approve

Dental History **Medical History** BP_Physical Exam Pediatric Med Hist

Form Question	Answer	Date
Dental History		
Dentist's Name and Address	Dr A Kim	08/07/2020
Dentist's phone #	204-258-8523	08/07/2020
Last Dental appointment	14/06/2018	08/07/2020
Do you have regular dental appointments?	Y	08/07/2020
☒ Have you had trouble with previous dental treatment?		
Do you think saving your teeth is a waste of time?		
☐ Do you have any lumps or sores in your mouth now?		
☐ Have you ever had lumps or sores in your mouth before?		
☐ Do you have pain in the teeth, jaws or head now?		
☐ Have you ever had pain in your teeth, jaws or head?		
☐ Do you have problems breathing through your nose?		

Forms on File

- DH Assessment Summary 05/10/2020
- General Referral Form
- MDA Implant Pgm Sub Cmte Form
- Medical History**
- O Path Consult Referral&Report
- Radiology Request Form
- TX Plan Form

To view or update the existing Medical History:

- Select Forms
- Select Medical History Form
- Complete/Update existing Dental, Medical History and BP Physical Exam tabs
- Get approval - new entries will appear blue until approved by an instructor

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date 01/02/2021 Last Appr. Waller (Administrator), I Approve

Dental History **Medical History** BP_Physical Exam Pediatric Med Hist

Form Question	Answer	Date
Blood Pressure and Physical Exam		
Blood Pressure		01/02/2021
Pulse		
Respiration		
Heart rate		
Weight		
Height		
☐ Gingiva Generalized		
☐ Gingiva Localized		
Extra-Oral Exam		

Forms on File

- DH Assessment Summary 05/10/2020
- General Referral Form
- MDA Implant Pgm Sub Cmte Form
- Medical History
- O Path Consult Referral&Report
- Radiology Request Form
- TX Plan Form

Context Menu:

- Show Form Instructions...
- Show Form Owner...
- Show Instructions...
- Show History...**
- Page Reviewed
- Answer Reviewed Ctrl+R
- Clear Answer Ctrl+L

To view the Blood Pressure History:

→ Select the BP_Physical Exam Tab

→ Highlight Blood Pressure and “right click”, choose Show History and pop-up window will appear

The screenshot shows the EHR interface with the 'BP_Physical Exam' tab selected. The 'Form Question' list on the left includes 'Blood Pressure', 'Pulse', 'Respiration', 'Heart rate', 'Weight', and 'Height'. The 'Show Form Answer History' window is open, displaying a table of historical data for the 'Blood Pressure' question.

Answer	Date	Time	User	Approved By
90/100	27/11/2019	11:18 AM	Waller (Ad...	Waller (Do...
80/100	27/11/2019	11:19 AM	Waller (Ad...	Waller (Do...
90/100	07/07/2020	04:16 PM	Waller (Ad...	Waller (Ad...
92/60	08/07/2020	09:38 AM	Waller (Ad...	Waller (Ad...
95/100	08/07/2020	09:38 AM	Waller (Ad...	Waller (Ad...
85/110	24/07/2020	01:22 PM	Student, T...	Student, T...
80/110	24/07/2020	01:29 PM	Student, T...	Student, T...
90/40	05/11/2020	03:08 PM	Student, T...	Student, T...
80/10101	05/11/2020	03:08 PM	Student, T...	Student, T...
90/100	01/02/2021	12:37 PM	Waller (Ad...	Waller (Ad...
90/86	01/02/2021	12:38 PM	Waller (Ad...	Waller (Ad...

If there is no existing Medical History Form

The screenshot shows the EHR interface with the 'Radiology, DexterFIVE (RAD125)' chart selected. The 'Add Form' window is open, and 'MEDHX' is selected from the dropdown list. The 'Forms on File' window is also open, showing a list of forms including 'CBCT Request Form' and 'Patient Screening Assessment'.

Add Form Window:

- Form: MEDHX
- Date: 22/11/2021
- Description: CBCT Request Form
- Status: [Empty]
- Instructions: [Empty]
- Assigned To: [Empty]
- Message Group: [Empty]
- User: MEDHX

Forms on File Window:

- CBCT Request Form
- ... 22/11/2021
- Patient Screening Assessment

Create a new record:

→ Select

→ Choose MEDHX from dropdown list, select ok

→ Complete Form

→ Get approval - new entries will appear blue until approved by an instructor

Template Note

EHR - Chart / Tx History - RADReed, Willis (RAD017)

Alerts Problems Objectives

Medical Alerts:
High Cholesterol
History of Myocardial Infarction

Current Medications:
Rosuvastatin (Crestor)

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Appr. User	Description
12/08/24	T. Student	27301	47	MODBL	E		0	T. Student	Full Metal Crown
26/11/24	T. Student	0100.34			C		0	O. Card 1	Perio Patient Assessment DH2
26/11/24	T. Student	1N200			C		0	O. Card 1	New Perio Patient Package PSR 2 (Full up to 17 teeth)
26/11/24	T. Student	1N200.1			C				
26/11/24	T. Student	1N200.2			C				
23/06/25	T. Student	02112			C				
11/08/14	T. Student	Appoint			R				
19/06/18	T. Student	Appoint			R				
04/12/20	T. Student	SPT3_6			RC				
26/05/25	T. Student	SPT2_6			RC				
12/08/24	T. Student	27201.2	14		P				
12/08/24	T. Student	27201.3	14		P				
12/08/24	T. Student	27201.4	14		P				
12/08/24	T. Student	L27201	14		P	Not Req'd	0	O. Card 1	Lab - Porcelain Crown

Select Note Type

Select

☐ General Note

☒ Template Note

☐ SOAP Note

OK Cancel

Site All

From 24/06/2015

To 24/06/2025

Views

Station View

Standard view (all txs)

Pre-existing only

Planned only

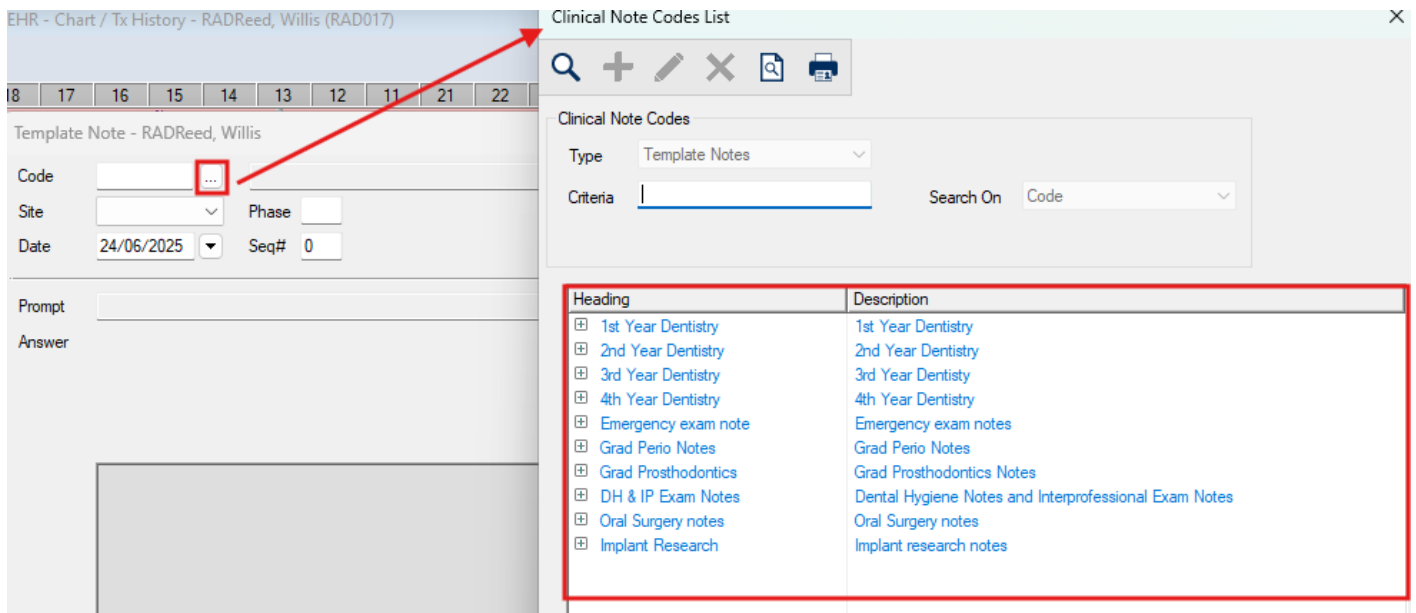
Planned & In-Process

Completed only

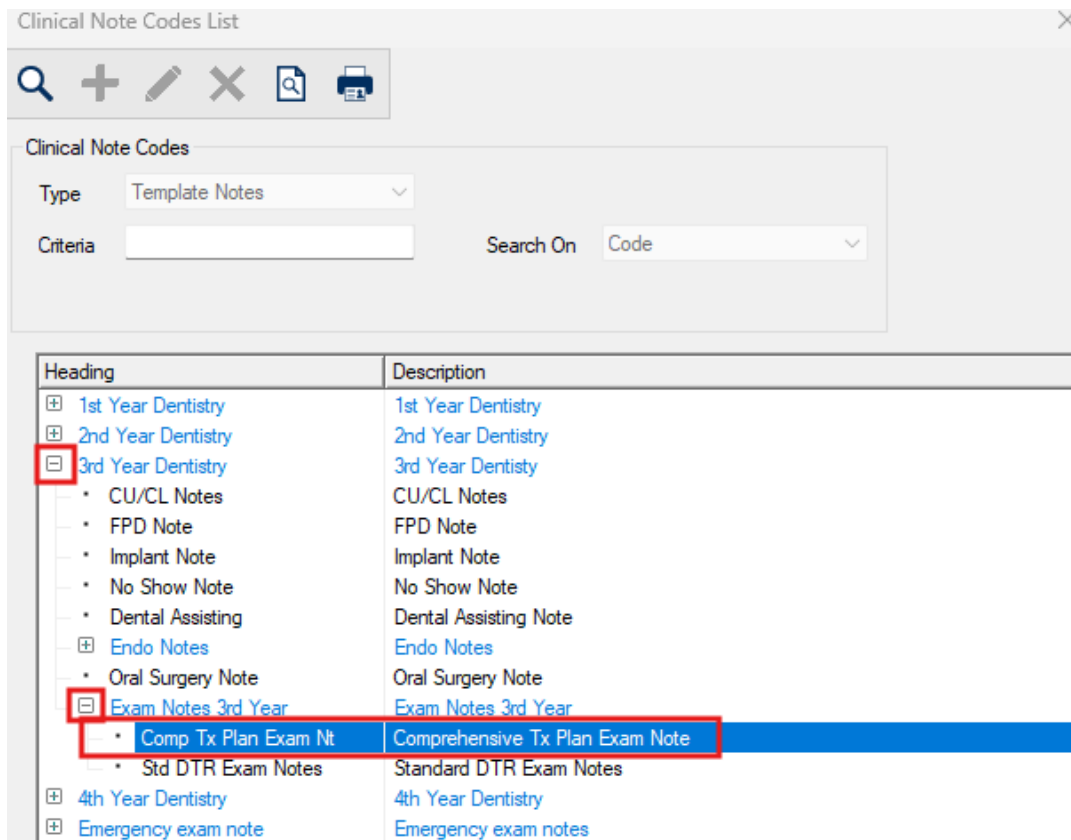
→ Select Tx History tab

→ “Click” on the Add a New Note icon  (A window to Select Note Type will appear)

→ Select the Template Note and “click” ok



- Template Note window opens, “click” the ellipsis  (A window to Select Clinical Note Codes List will appear)
- Expand  heading of your designated class to populate note type options



- “Double click” on appropriate note for current session

Template Note - RADReed, Willis

Code ... Comprehensive Tx Plan Exam Note

Site Phase User Please swipe to add a note for a different user

Date Seq# Appr. User

Prompt

Answer

Next
Prev
Find

OK Cancel

**** COMPREHENSIVE TX PLAN EXAM NOTE -- Supervising Instructor: [Icon] ****
 Medical History: { * }
 Details of Md Hx change: { * }
 Comprehensive Tx Plan: { * }
 X-Ray Record: { * } bite-wing(s), { * } PA(s), { * } Panoramic
 Patient Disposition: { * }
 Dental materials used: { * }
 Adverse Effects or Errors: { * }
 Details of Adverse Effects or Errors: { * }
 Additional Information: { * }
 Date Sterilized 1: { * Required } Sterilizer Number 1: { * Required } Load & Tray Number 1: { * Required }
 Date Sterilized 2: { * } Sterilizer number 2: { * } Load & Tray Number 2: { * }
 Date Sterilized 3: { * } Sterilizer number 3: { * } Load & Tray Number 3: { * }
 Date Sterilized 4: { * } Sterilizer number 4: { * } Load & Tray number 4: { * }
 Date Sterilized 5: { * } Sterilizer number 5: { * } Load & Tray number 5: { * }
 Date Sterilized 6: { * } Sterilizer number 6: { * } Load & Tray number 6: { * }
 Date Sterilized 7: { * } Sterilizer number 7: { * } Load & Tray number 7: { * }
 Date Sterilized 8: { * } Sterilizer number 8: { * } Load & Tray number 8: { * }
 Date Sterilized 9: { * } Sterilizer number 9: { * } Load & Tray number 9: { * }
 Date Sterilized 10: { * } Sterilizer number 10: { * } Load & Tray number 10: { * }

- Code: Note Selected (ex. D3X1 – Comprehensive Tx Plan Exam Note)
- Current date will populate automatically
- Answer question selected in Prompt field, select Next/Prev to navigate to remaining questions
- Select ok to close note
- Note will remain in blue text until completed and approved by instructor (note can be edited after closing by selecting the edit record icon )

EHR - Chart / Tx History - RADReed, Willis (RAD017)

Alerts Problems Objectives

Medical Alerts:
High Cholesterol
History of Myocardial Infarction

Current Medications:
Rosuvastatin (Crestor)

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Appr. User	Description
24/06/25	T. Student	Note					0		Last Modified: 24/06/25
** COMPREHENSIVE TX PLAN EXAM NOTE -- Supervising Instructor: Alai-Towfigh, Hamideh ** Medical History: * Details of Md Hx change: * Comprehensive Tx Plan: * X-Ray Record: * bite-wing(s), * PA(s), * Panoramic Patient Disposition: * Dental materials used: * Adverse Effects or Errors: * Details of Adverse Effects or Errors: * Additional Information: * Date Sterilized 1: 24/06/2025 Sterilizer Number 1: 12345 Load & Tray Number 1: load 1 and tray 2 Date Sterilized 2: * Sterilizer number 2: * Load & Tray Number 2: * Date Sterilized 3: * Sterilizer number 3: * Load & Tray Number 3: * Date Sterilized 4: * Sterilizer number 4: * Load & Tray number 4: *									

Load All

Site All ...

From 24/06/2015 ...

To 24/06/2025 ...

Views
Station View
Standard view (all txs)
Pre-existing only
Planned only
Planned & In-Process
Completed only

Radiology Request & Report Form

EHR - Chart / Forms - RADRedick, J.J. (RAD112)

Alerts Problems Objectives

Medical Alerts:
Functional Heart Murmur (No AB required)
History of Rheumatic Heart Disease; Proph AB Req'd; Follow

Patient Alerts:
A.M. Appt. Only/Preferred

Tx History Tx Plans **Forms** Attachments/Consents Perio Chart Add

Form #	Date	Description	Status	User	Assigned To
303221	05/10/2020	DH Assessment Summary			

Add Form

Form
Form **RADREQ**
Date 13/06/2025
Description Radiology Request Form
Status REQ

Instructions
After creating your new Radiology Request form, and setting the "Status" to "REQ"usted, you must then fill out the "Request" page, and have your instructor *sign both that page and your planned radiograph(s)*

Assigned To
Message Group
User Student, Test

Forms on File
DH Assessment Summary
05/10/2020
General Referral Form
MDA Implant Pgm Sub Cmte Form
Medical History
O Path Consult Referral&Report
Radiology Request Form
TX Plan Form

To request radiographs, complete the Radiology Request Form

- Enter planned radiograph codes in Tx History tab
- Select **+**
- Choose RADREQ from dropdown list, select ok

EHR - Chart / Forms - RADRedick, J.J. (RAD112)

Alerts Problems Objectives

Medical Alerts:
Functional Heart Murmur (No AB required)
History of Rheumatic Heart Disease; Proph AB Req'd; Follow

Patient Alerts:
A.M. Appt. Only/Preferred

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date 13/06/2025 REQ Last Appr. Approve Forms on File

[Request Request Approved old Report (pre2012) Report/Findings]

Form Question	Answer	Date
Radiology Request		
Requesting discipline or department		
Radiograph ordered by		
Reason for requesting radiographs		
☐ Analog radiographs taken?		
☒ Radiographs requested		
In the "Radiographs Requested" section of this form, have you entered all the correct radiographs needed?		

Forms on File

- DH Assessment Summary 05/10/2020
- General Referral Form
- MDA Implant Pgm Sub Cmte Form
- Medical History
- O Path Consult Referral&Report
- Radiology Request Form
 - 27/06/2019
 - 27/06/2019
 - 27/11/2019
 - 05/11/2020
 - 01/02/2021
 - 13/06/2025
- TX Plan Form

- Select Request tab
- EPR questions must be answered to complete the form

EHR - Chart / Forms - RADRedick, J.J. (RAD112)

EPR Question Details - Checklist

Radiographs requested

Options

Options	Info
☒ Periapicals	
☐ Bite-wings	
☐ Panoramic	
☐ Cephalometric	
☐ Occlusal	
☐ FMS (Full Mouth Scan)	
☐ No charge radiograph (02129I)	
☐ Other	

Add Info

EPR Question Details - Additional Info

Periapicals

of Periapicals

Which periapical sites?

Form Question

Radiology Request

Requesting discipline or department

Radiograph ordered by

Reason for requesting radiographs

☐ Analog radiographs taken?

☒ Radiographs requested

Panoramic

In the "Radiographs Requested" section of this form, have you entered all the correct radiographs needed?

Routine ch
N
Y
N

13/06/2025
13/06/2025

27/11/2019
05/11/2020
01/02/2021
13/06/2025

TX Plan Form

- EHR - Chart / Forms - RADRedick, J.J. (RAD112)

Alerts Problems Objectives

Medical Alerts:

 - Functional Heart Murmur (No AB required)
 - History of Rheumatic Heart Disease; Proph AB Req'd; Follow

Patient Alerts:

 - A.M. Appt. Only/Preferred

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date 13/06/2025 REQ

Last Appr. Approve

Request Request Approved old Report (pre2012) Report/Findings

Form Question	Answer	Date
Radiograph approval form		
All radiographic information in order?		
Reason for denial		

Forms on File

 - DH Assessment Summary
 - 05/10/2020
 - General Referral Form
 - MDA Implant Pgm Sub Cmte Form
 - Medical History
 - O Path Consult Referral&Report
 - Radiology Request Form
 - 27/06/2019
 - 27/06/2019
 - 27/11/2019
 - 05/11/2020
 - 01/02/2021
 - 13/06/2025
 - TX Plan Form

- 28

EHR - Chart / Tx History - RADReed, Willis (RAD017)

Alerts | Problems | Objectives

Medical Alerts:
High Cholesterol
History of Myocardial Infarction

Current Medications:
Rosuvastatin (Crestor)

Tx History | Tx Plans | Forms | Attachments/Consents | Perio | Chart Add

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Appr. User	Description
12/08/24	T. Student	27301	47	MODBL	E		0	T. Student	Full Metal Crown
26/11/24	T. Student	0100.34			C		0	O. Card 1	Perio Patient Assessment DH2
26/11/24	T. Student	1N200			C		0	O. Card 1	New Perio Patient Package PSR 2 (Full up to 17 teeth)
26/11/24	T. Student	1N200.1			C		0	O. Card 1	Complete Perio Exam NPP2
26/11/24	T. Student	1N200.2			C		0	O. Card 1	Scaling
11/08/14	T. Student	Appoint			R				Main Clinic - 15 Minutes
19/06/18	T. Student	Appoint			R				Main Clinic - * All Session *
04/12/20	T. Student	SPT3_6			RC				1PERIO - SPT3 6 months in Main Clinic
26/05/25	T. Student	SPT2_6			RC				1PERIO - SPT2 6 months in Radiology
12/08/24	T. Student	27201.2	14		P		0	O. Card 1	Porc/Ceram. Cr. Final Impression/Lab
12/08/24	T. Student	27201.3	14		P		0	O. Card 1	Porc/Ceram. Cr. Try-In
12/08/24	T. Student	27201.4	14		P		0	O. Card 1	Porc/Ceram. Cr. Cement/Finish
12/08/24	T. Student	L27201	14		P	Not Req'd	0	O. Card 1	Lab - Porcelain Crown
23/06/25	T. Student	02112			P		0		Two Images

Load All

Site: All

From: 23/06/2015

To: 23/06/2025

Views

- Station View
- Standard view (all txs)
- Pre-existing only
- Planned only
- Planned & In-Process
- Completed only

→ Select the Patient exposures icon

EHR - Chart / Tx History - RADReed, Willis (RAD017)

Patient Exposures

Exposures 3

Procedure 02111 Single Image

Exposure Count 1

Is digital and accessible to view in EHR or Imaging application Yes

Date	Code	Description	Exposures	Digital/Access	Linked to Tx
04/06/2020	02112	Two Images	3	Unknown	Yes
31/08/2022	02111	Single Image	0	Yes	Yes

In Progress | Tx History | Tx Plans

Date	Prov./User	Code
12/08/24	T. Student	27301
26/11/24	T. Student	0100.34
26/11/24	T. Student	1N200
26/11/24	T. Student	1N200.1
26/11/24	T. Student	1N200.2
23/06/25	T. Student	02112
11/08/14	T. Student	Appoint
19/06/18	T. Student	Appoint
04/12/20	T. Student	SPT3_6
26/05/25	T. Student	SPT2_6
12/08/24	T. Student	27201.2
12/08/24	T. Student	27201.3
12/08/24	T. Student	27201.4
12/08/24	T. Student	L27201

→ Review exposure count (this count reflects all images taken during current session, including retakes)

→ Update the exposure count if required and select modify record

EHR - Chart / Forms - RADAbdul-Jabbar, Kareem (RAD018)

Alerts Problems Objectives

Medical Alerts:

- Allergy to Penicillin
- Atrial Fibrillation
- Bleeding Disorder- see chart
- High Cholesterol
- History of Angina Pectoris
- History of Autism
- History of Rheumatic Heart Disease; Proph AB Req'd; Fc
- History of thyroid dysfunction- see chart
- Organic Heart Murmur (Requires Proph AB/Current AHA
- Type 1 Diabetes (Insulin-Dependent /IDDM)

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date: 23/06/2025 REQ

Request Request Approved old Report (pre2012) **Report/Findings**

Form Question	Answer
Radiographic Report	
Enter total number of images taken?	4
Enter total number of Re-Takes taken?	2
What is the reason for Re-Takes taken?	patient moved
Reason for taking images	routine check up
Were standard imaging techniques used?	Y
☒ Intraoral films	Y
☒ Bitewings	Y
Type of Bitewings taken	Both
Incidental findings of clinical significance, or those requiring follow-up.	test

EPR Question Details - Checklist

Were standard imaging techniques used?

Options

Options	Info
☒ Intraoral films	
☒ Bitewings	i
☐ Periapical	
☐ FMX	
☐ Any abnormalities or other findings in intraoral films?	
☐ Cephalogram, NOS	
☐ Panoramic films	
☐ Any abnormalities or other findings in panoramic films?	
☐ Cone Beams	
☐ Any abnormalities or other findings in cone beams?	

EPR Question Details - Additional Info

Bitewings

Type of Bitewings taken: Both

- Select Report/Findings tab and complete findings
- Get approval - entries will appear blue until approved by an instructor

EHR - Chart / Forms - RADRedick, J.J. (RAD112)

P 18 17 P 16 P 55 P 54 P 53 N P 12 11 21 22 N 63 64 N 65 26 27 28

Alerts Problems Objectives

Medical Alerts:
Functional Heart Murmur (No AB required)
History of Rheumatic Heart Disease: Proph AB Req'd; Follow

Patient Alerts:
A.M. Appt. Only/Preferred

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date 13/06/2025 REQ Last Appr. Approve Forms on File

Request Request Approved old Report (pre2012) Report/Findings

Form Question Answer Date

Radiographic Report

Enter total number of images taken?

Enter total number of Re-Takes taken?

What is the reason for Re-Takes taken?

Reason for taking images

Were standard imaging techniques used?

Incidental findings of clinical significance, or those requiring follow-up.

Add Form Action

Comment

Status REQ

Assigned To REQ Radiographs requested

Message Group FIN Finished entering findings

User Student, Test

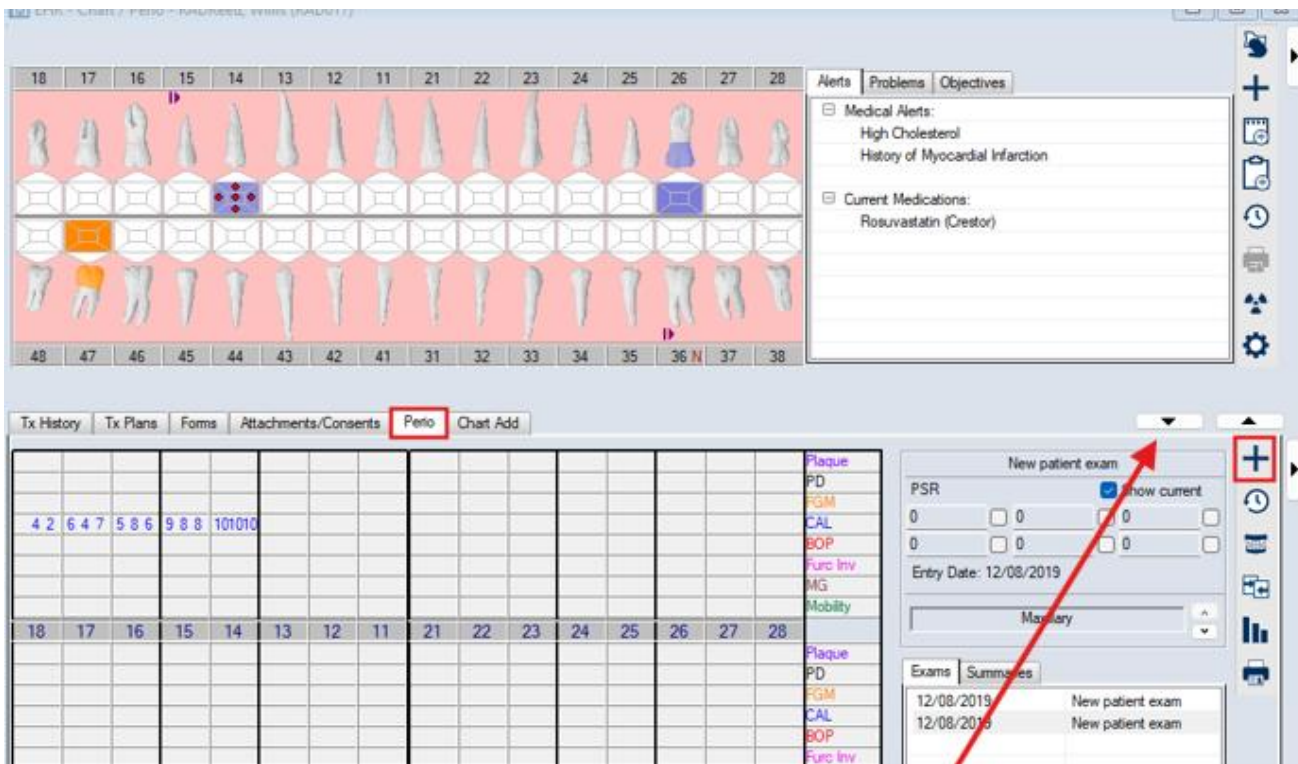
OK Cancel

- Select  Action
- Select Status dropdown list
- Select FIN to indicate you have finished entering findings
- Delete your name from the User field by clicking X
- Select OK

Perio Chart

Perio chart can be accessed through the EHR or by the Perio Chart Module in the main menu

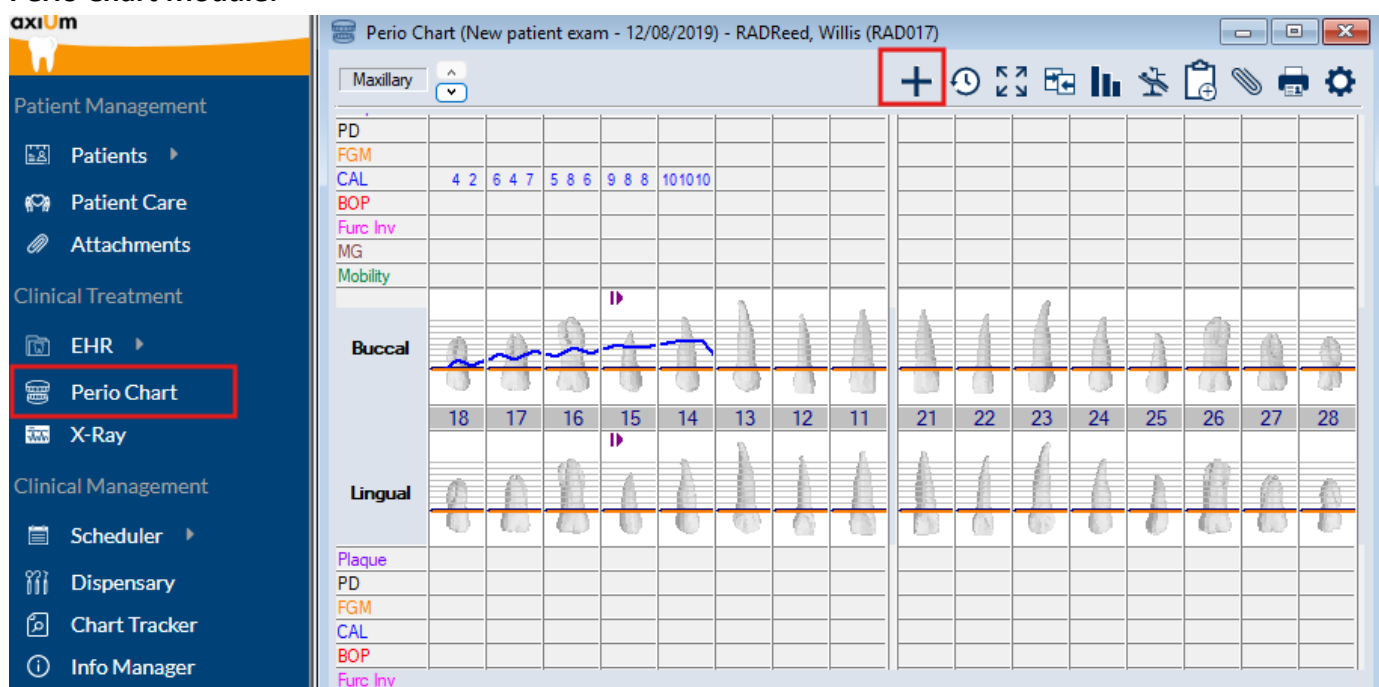
EHR Module:



→ Select the Perio tab and create new record icon 

→ To expand/minimize the perio chart through the EHR module select 

Perio Chart Module:



→ Select the Perio chart module and create a new record icon 

→ Select exam type

Add Perio - RADReed, Willis

Exam Type: New patient exam 24/06/2025 Save Reset Clear Condition Incomplete Complete Cancel

Plaque PD FGM CAL BOP Furc Inv MG Mobility

Buccal

Lingual

18 17 16 15 14 13 12 11

Maxillary Right

Clear

1 2 3 4

5 6 7 8

9 10 11 12

13 14 15

Up Down Previous Next

Value	Key	Description
1	1	1 mm
2	2	2 mm
3	3	3 mm
4	4	4 mm
5	5	5 mm
6	6	6 mm
7	7	7 mm
8	8	8 mm
9	9	9 mm
10	0	10 mm
11	11Q...	11 mm
12	12Q...	12 mm

Notes/Conditions...

- Upper Right-side field will indicate location in the mouth (ie. Maxillary Right)
- Set cursor to desired surface of tooth cell in line with selected condition (tooth location will highlight)
- Select condition you want to begin exam with by selecting cell
- Each cell represents three surfaces of a tooth:
 - ex. Tooth 18 ex. Tooth 28
 - Left= Distal Left= Mesial
 - Middle= Buccal Middle= Buccal
 - Right= Mesial Right= Distal

Plaque PD FGM CAL BOP Furc Inv MG Mobility

Buccal

18

28

- Use the number/letter keys or keypad to continue entering conditions as required (Once you begin entering the values for a condition, it will automatically move to the next tooth)
- As you are entering your Perio Exam, you can also add Tooth Condition's for the selected tooth by choosing the Notes/Conditions button

Add Perio - RADReed, Willis

Exam Type: Re-evaluation exam 24/06/2025 **Save** Reset Ctr Condition Incomplete Complete Cancel

	21	22	23	24	25	26	27	28
Plaque								
PD								
FGM	8 5 3	4 5 3	4 5 3	5 4 6	3 4 5	5 2 4	7 5 8	7 8 7
CAL	8 5 3	4 5 3	4 5 3	5 4 6	3 4 5	5 2 4	7 5 8	7 8 7
BOP								
Furc Inv								
MG								
Mobility								
Buccal	[Tooth Diagrams 21-28]							
Lingual	[Tooth Diagrams 21-28]							

Maxillary Left

Clear **7** 8 7 Ctr Tooth

-5 -4 -3 -2

-1 0 1 2

3 4 5 6

7 8 9 10

Up Down Previous Next

Value	Key	Description
-5	-5Alt...	-5 mm
-4	-4Alt...	-4 mm
-3	-3Alt...	-3 mm
-2	-2Alt...	-2 mm
-1	-1Alt...	-1 mm
0	0	0 mm
1	1	1 mm
2	2	2 mm
3	3	3 mm
4	4	4 mm
5	5	5 mm
6	6	6 mm

Notes/Conditions...

→ Save your completed/incomplete perio charting before closing

To resume an incomplete exam on file during an alternate session:

→ Select **+** within the Perio Chart

A pop-up warning will ask if you want to: resume entry of an incomplete exam?

→ Select (Yes) to continue or (No) to enter a new exam

Perio Chart (New patient exam - 24/06/2025) - RADReed, Willis (RAD017)

Maxillary Unapproved **+** [Icons]

	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
PD	2 2	5 5 5	4 2 4	5 4 5														
FGM																		
CAL	2 2	5 5 5	4 2 4	5 4 5														
BOP																		
Furc Inv																		
MG																		
Mobility																		
Buccal	[Tooth Diagrams 18-16]									[Tooth Diagrams 26-28]								
Lingual	[Tooth Diagrams 18-16]									[Tooth Diagrams 26-28]								

Resume Perio Warning

? Would you like to resume entry of a previous incomplete exam?

Yes No

Tx Plan Form

EHR - Chart / Forms - RADKerr, Steve (RAD0101)

Alerts Problems Objectives

Medical Alerts:

- Allergy to ASA
- High Cholesterol
- History of Angina Pectoris
- History of Rheumatic Heart Disease: Proph AB Req'd; Fc
- Organic Heart Murmur (Requires Proph AB/Current AHA
- Uncontrolled Hypertension

Current Medications:

- Simvastatin (Zocor)

Add Form

Form: TXPLAN

Date: 30/06/2025

Description: TX Plan Form

Status:

Instructions:

Assigned To:

Message Group:

User:

Forms on File

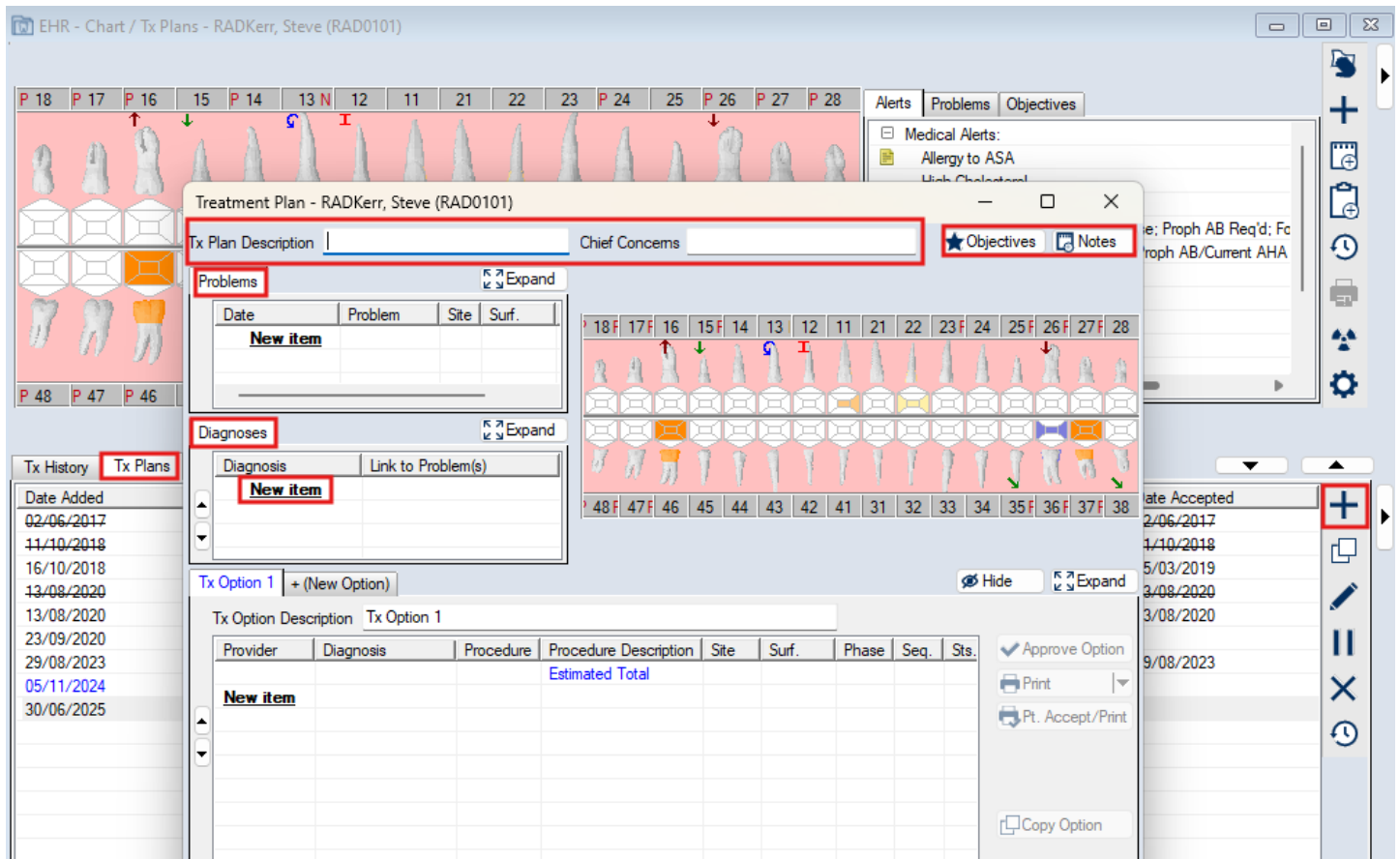
- DH Assessment Summary
 - 19/08/2020
 - 19/08/2020
 - 19/08/2020
- DH Gingival Inflammation Index
- DH Radiographic Analysis
- DH Smoking History
- Dental Hygiene Care Plan
- Fee Waiver Form
- General Perio Patient Form
- General Referral Form
- Medical History
- Patient Complaint
- Radiology Request Form
- TX Plan Form**

To enter a TXPLAN (Treatment Plan) Form:

- Select Forms tab in EHR
- Select  to add a new Form
- Select TXPLAN from dropdown list and select ok to populate
- Answer all questions
- Note will remain in blue text until completed and approved by instructor (note can be edited after closing by “double clicking” on it)

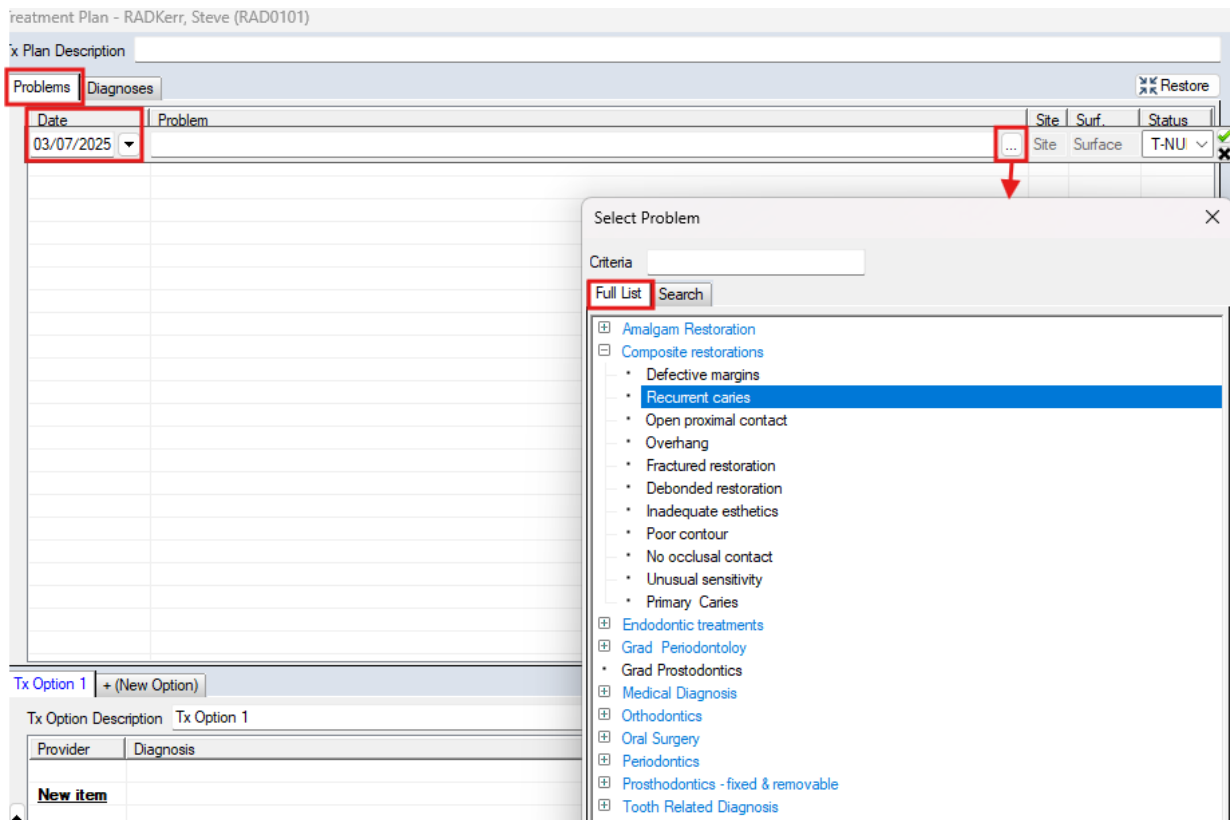
Once the TXPLAN Form has been completed and approved Open the Tx Plans tab in EHR

→ Select  to add a new TX Plan

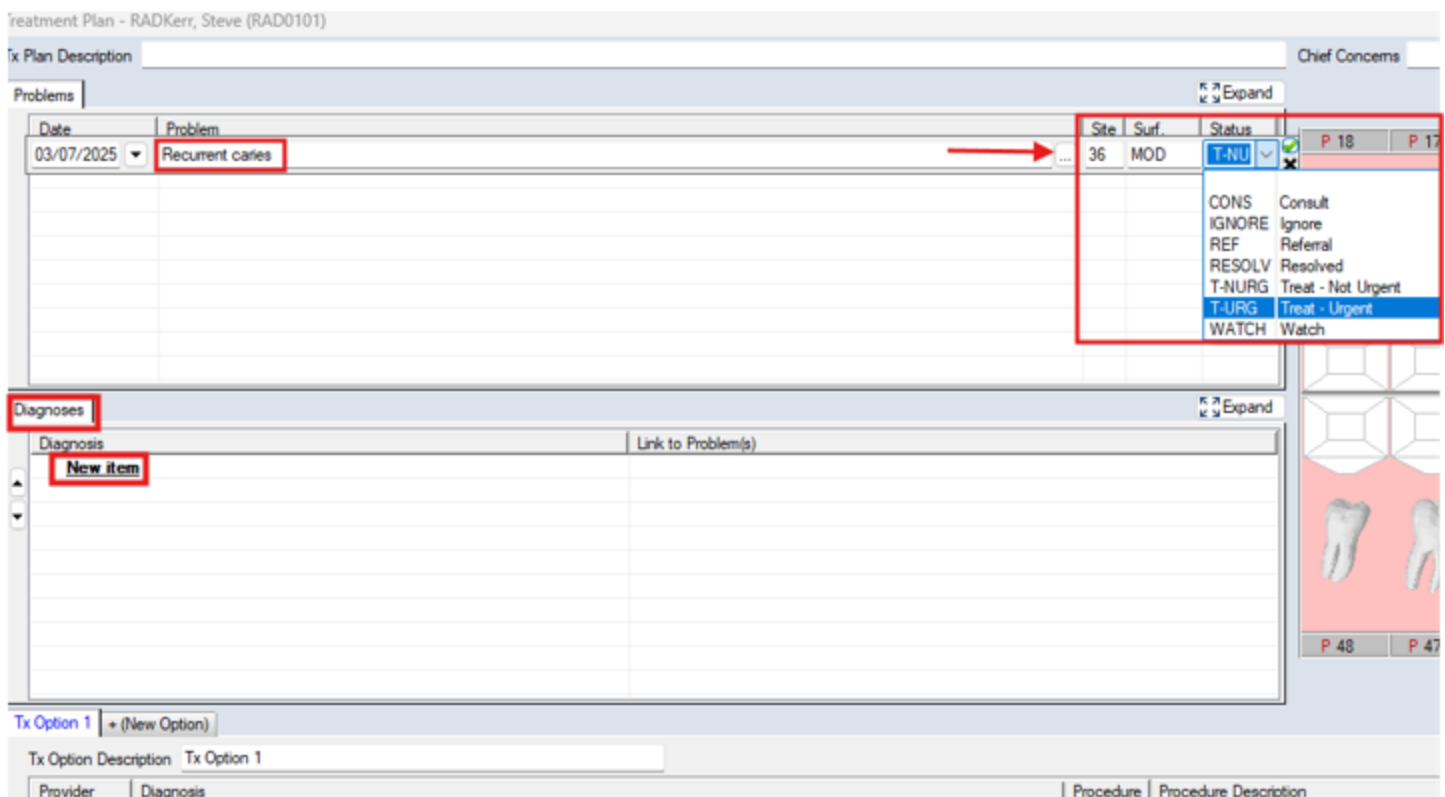


The screenshot shows the 'Treatment Plan - RADKerr, Steve (RAD0101)' form. The 'Tx Plan Description' and 'Chief Concerns' fields are highlighted with red boxes. The 'Objectives' and 'Notes' tabs are also highlighted. The 'Problems' and 'Diagnoses' sections are expanded, showing 'New item' buttons. The 'Tx Option 1' section is also visible, with a 'New item' button. The background shows a dental chart with various teeth and a timeline of procedures.

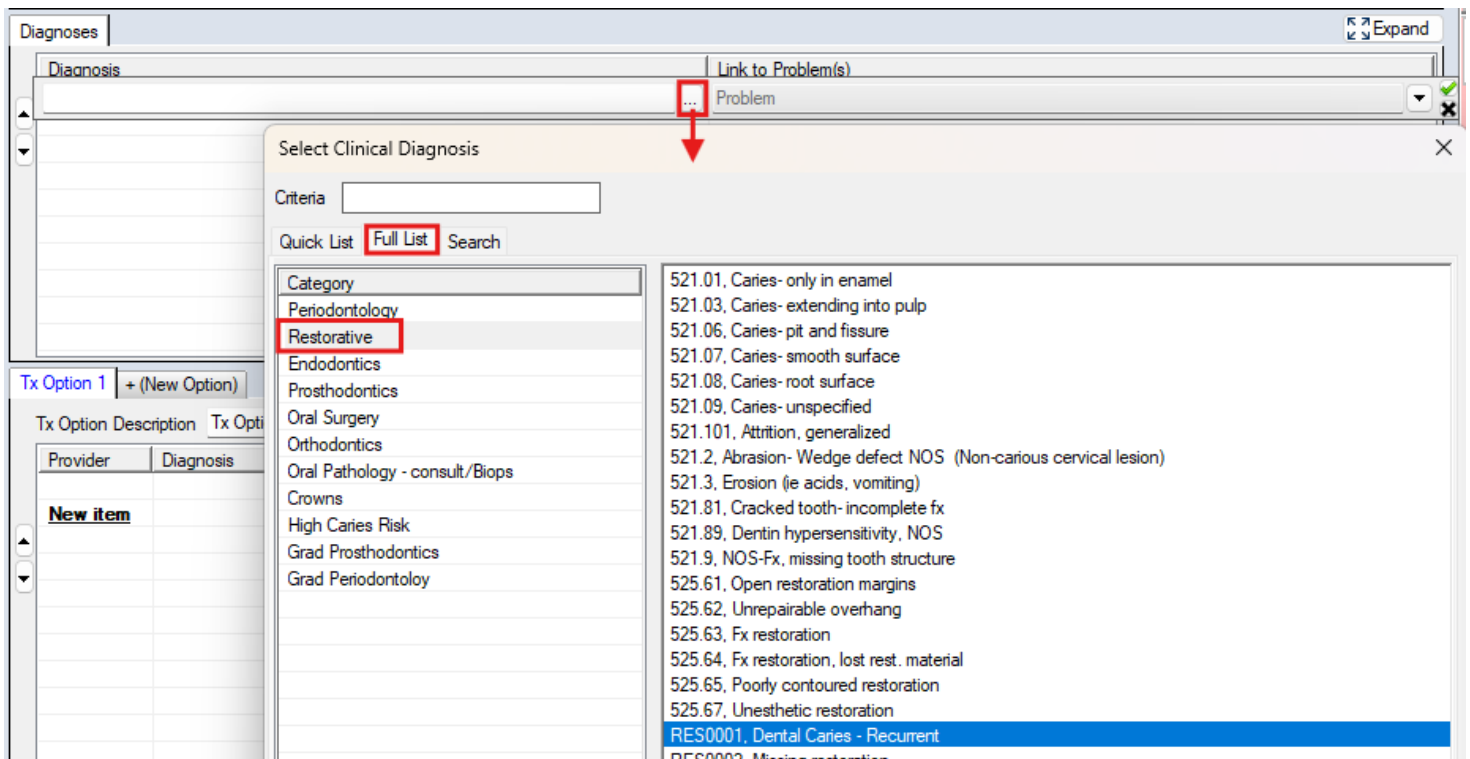
- Complete “TX Plan Description” Field – Enter your provider (A) number followed by the description of tx plan
- Complete the “Chief Concerns” Field
- You can then enter the Provider (DR) / Patient (PT) “Obejectives / Notes” by choosing either field



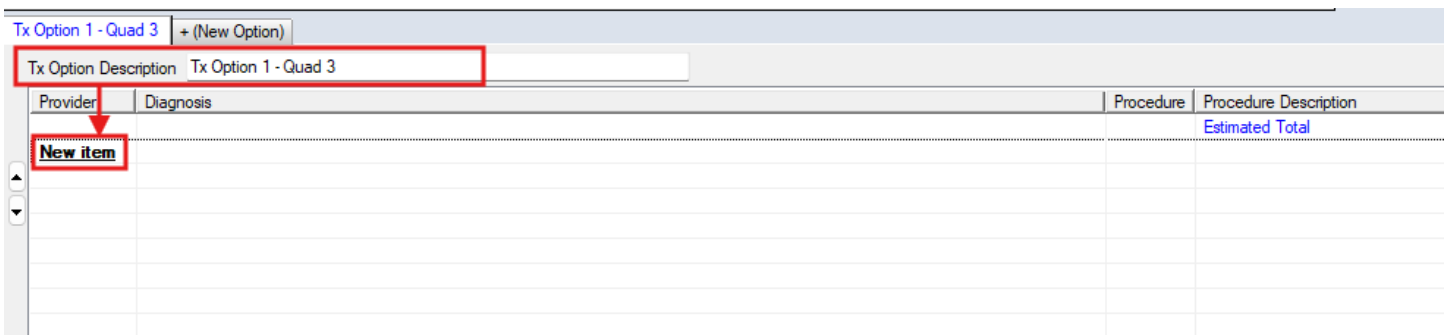
→ Select the elipsis to populate a Full List of problems you can use to indicate your findings (each dicipline can be expanded to specify problems)



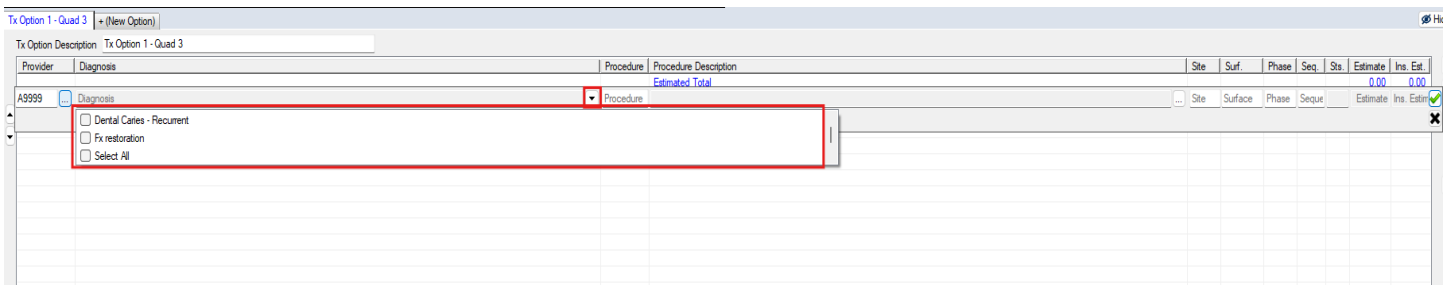
- Must enter site, surface and status for each problem entered
- Select "New Item" in the "Diagnoses Tab"



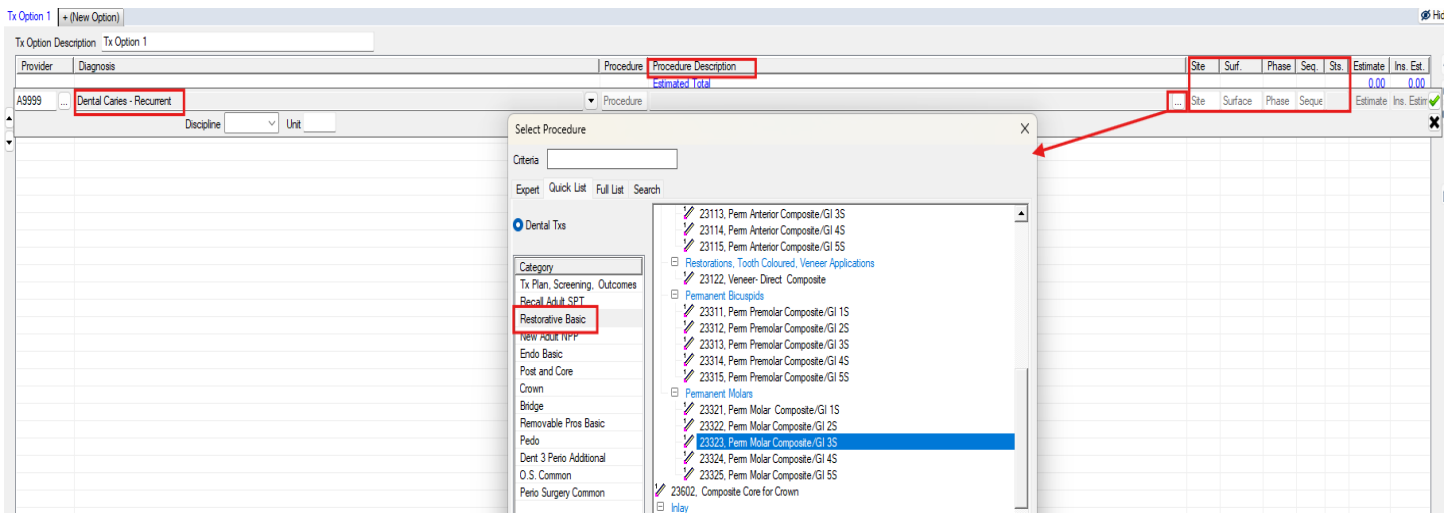
- Select the elipsis to populate a Full List of Clinical Diagnosis you can use to indicate your findings (each discipline can be expanded to specify problems)
- You must link the diagnosis code to at least one problem code
 - A diagnosis code can be linked to multiple problems
 - You cannot duplicate diagnosis codes



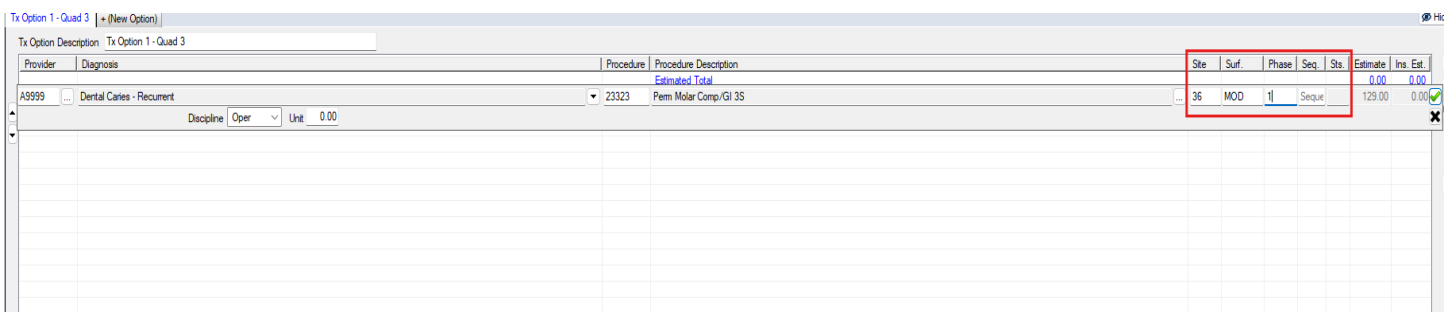
- Enter description in the “Tx Option Description Field”
- Select “New Item”



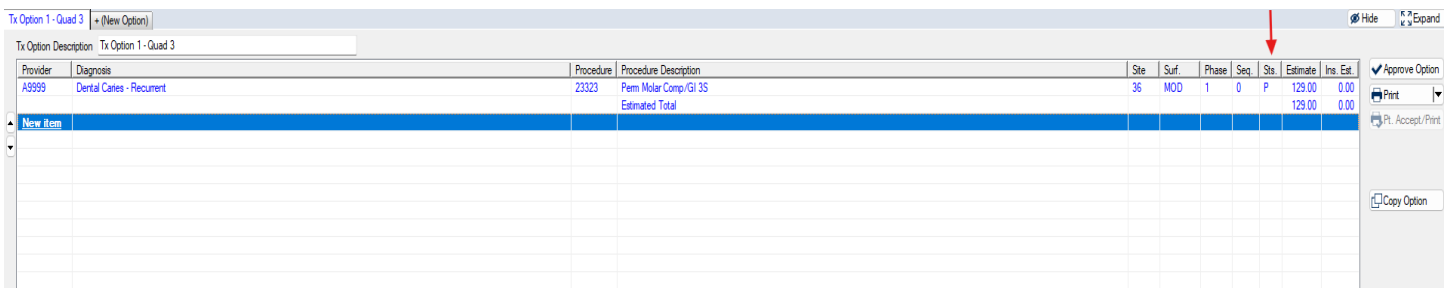
- Select diagnosis from the drop-down menu



- Match diagnosis code to correct Procedure by selecting the ellipsis for “Procedure Description”
- Select “Quick List” and choose appropriate discipline to populate treatment procedure codes



- Enter site, surface, phase, sequence for procedure code entered



- Status will automatically update as Planned (P) after you enter procedure code
- If the procedure code you have chosen does not have a price listed (\$0.00) it is an incorrect code
- A diagnosis code can be linked to multiple procedure codes
- You can edit or delete a line by “right clicking” on the item

Approve Treatment Plan Option
✕

Approval From	Approval User	Approval Date
Instructor		

Close

Approve

Phase:Seq.	Provider	Diagnosis	Procedure	Procedure Description	Site	Surf.
1 : 0	A9999	Dental Caries - Recurrent	23323	Perm Molar Comp/GI 3S	36	MOD

Close

Approve

Close

Approve

- ✓ Approve Option
Print
Pt. Accept/Print
Copy Option

42

Treatment Plan Contract

SAP CRYSTAL REPORTS®

Main Report

UNIVERSITY of MANITOBA | Rady Faculty of Health Sciences

Treatment Plan

Dr. G. Niznick College of Dentistry
Dr. A. Kim
D126-790 Bannatyne Avenue
Winnipeg, MB R3E 0W2
(204) 789-3497

Patient: GeorgeRADMikan (RAD012) **Date Instructor Approved:** July 19, 2019

Description:
Chief Concerns:
Objectives:
Problems:
Diagnoses:

Phase	Seq	Producer	Code	Description	Site	Surface	Estimate	Ins Pays	Patient Accepted
Option: TxOption 1									
	0		0100.X	Perio Surgery Assist			0.00	0.00	
Sub Total:							\$0.00	\$0.00	
Grand Total:							\$0.00	\$0.00	

ALL FEES QUOTED ARE ESTIMATES ONLY AND SUBJECT TO CHANGE. Sometimes treatment approaches have to change due to unforeseen circumstances, and so do the costs involved. Your student practitioner will discuss any of these changes to treatment and to the associated fees with you before work continues. Also, treatment may extend over 2 or 3 academic years, and so the fees may increase slightly if treatment is over a lengthier period of time. We only have very limited clinic hours over the summer months.

Instructor: David Waller (Administrator)
Consultant:

George RADMikan

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

- A PDF document of the Treatment Plan will populate for the patient to review

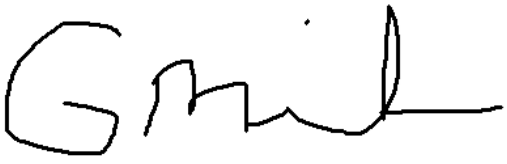
Patient Signature - Treatment Plan Contract

Name: George RADMikan

OK

Cancel

Please sign (below)



Clear

- Close out of PDF document to populate signature pad for patient to sign electronically
- Select "OK"

Attachments/Consents - RADar, Doppler (1111)

Release of patient information consent on file ☐ Show Deleted

Consents (14)

Date	Consent Code	Description	File Type	Denied	Expiry Date	User
25/03/2022	IMBCOM	Infectious Control Treatment	pdf		25/03/2022	Rodriguez (P...
25/03/2022		Treatment Plan Contract	pdf			Rodriguez (P...
10/01/2022		Treatment Plan Contract	pdf			Rodriguez (P...
19/10/2021		Treatment Plan Contract	pdf			Pammar, Lars...
24/08/2021		Treatment Plan Contract	pdf			Rodriguez (P...
24/08/2021		Treatment Plan Contract	pdf			Rodriguez (P...
24/08/2021		Treatment Plan Contract	pdf			Ferreira, Kevi...
20/08/2021		Treatment Plan Contract	pdf			Rodriguez (P...
19/08/2021		Treatment Plan Contract	pdf			Rodriguez (P...
17/08/2021		Treatment Plan Contract	pdf			Ferreira, Kevi...
17/08/2021		Treatment Plan Contract	pdf			Rodriguez (P...
03/11/2020	GPPTCW	GPerio PT Consent & Waiver	pdf			Olinander, S...
03/11/2020	EXPBLD	EXPOSURE TO BLOOD AND B...	pdf			Olinander, S...
12/09/2016	PTC1111	Patient Satisfaction Questionnaire	pdf			Kenn, Cathari...

- The signed Treatment Plan will now be saved in “Attachments – Consents – Patient Consents”
- A printed copy for your patient can be requested at checkout from a PCC or Reception staff member

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Date	Prov./User	Code	Site	Surf.	Stat	Pre-Auth	Phase	Appr. User	Description
Date Sterilized 1: 11/06/2025 Sterilizer Number 1: 1 Load & Tray Number 1: 23-123									
Date Sterilized 2: * Sterilizer number 2: * Load & Tray Number 2: *									
Date Sterilized 3: * Sterilizer number 3: * Load & Tray Number 3: *									
Date Sterilized 4: * Sterilizer number 4: * Load & Tray number 4: *									
Date Sterilized 5: * Sterilizer number 5: * Load & Tray number 5: *									
Date Sterilized 6: * Sterilizer number 6: * Load & Tray number 6: *									
Date Sterilized 7: * Sterilizer number 7: * Load & Tray number 7: *									
Date Sterilized 8: * Sterilizer number 8: * Load & Tray number 8: *									
Date Sterilized 9: * Sterilizer number 9: * Load & Tray number 9: *									
Date Sterilized 10: * Sterilizer number 10: * Load & Tray number 10: *									
14/08/24	T. Student	10013			P	Not Req'd *	0	O. Card 1	Perio Re-eval full session
06/01/25	T. Student	02115			P	Not Req'd	0	O. Card 1	Five Images
06/01/25	T. Student	21223	17	DOL	P	Not Req'd	0	O. Card 1	Perm Molar 3 Surf Am
06/01/25	T. Student	23321	46	M	P	Not Req'd	0	O. Card 1	Perm Molar Comp/GI 1S

Load All

Site All

From 03/07/2015

To 03/07/2025

Views

- Station View
- Standard view (all txs)
- Pre-existing only
- Planned only
- Planned & In-Process
- Completed only

- All planned treatments approved by patient and instructor will now appear in the TX History Tab in EHR
- If you need to modify the treatment plan create a “Copy” of the existing treatment plan, make necessary modifications and repeat approval steps above

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Date Added	Treatment Plan	Selected Option	Date Accepted
14/12/2023			
08/08/2024			
14/08/2024	A9999 Treatment plan	Tx Option 1	14/08/2024
15/08/2024	TEST		
16/08/2024			
29/08/2024	Sean O'Malley UFC		
29/08/2024		Tx Option 1	29/08/2024
30/08/2024			
11/09/2024			
09/10/2024			
06/01/2025	A9999 treatment plan	Tx Option 1	06/01/2025
06/01/2025	Copy of A9999 treatment plan		
06/01/2025			

→ In Tx Plans Tab highlight the Treatment Plan you wish to copy

→ Select  to copy record

Tx History	Tx Plans	Forms	Attachments/Consents	Perio	Chart Add
Date Added	Treatment Plan	Selected Option	Date Accepted		
14/12/2023					
08/08/2024					
14/08/2024	A9999 Treatment plan	Tx Option 1	14/08/2024		
15/08/2024	TEST				
16/08/2024					
29/08/2024	Sean O'Malley UFC				
29/08/2024		Tx Option 1	29/08/2024		
30/08/2024					
11/09/2024					
09/10/2024					
06/01/2025	A9999 treatment plan	Tx Option 1	06/01/2025		
06/01/2025	Copy of A9999 treatment plan				
06/01/2025					
03/07/2025	Copy of A9999 treatment plan				

→ Highlight the “Copy of..” treatment plan

→ Select  to edit the copied treatment plan

Treatment Plan - RADO'Malley, Sean (RAD559)

Tx Plan Description: Copy of A9999 treatment plan

Chief Concerns:

Objectives:

Notes:

Problems

Date	Problem	Site	Surf.
06/01/2025	Recurrent ...	46	M
06/01/2025	Recurrent ...	45	MO

Diagnoses

Diagnosis	Link to Problem(s)
Missing resto...	Broken amalgam (17)
	Recurrent caries (45)
	Recurrent caries (46)

Tx Option 1 + (New Option)

Tx Option Description: Tx Option 1

Provider	Diagnosis	Procedure	Procedure Description	Site	Surf.	Phase	Seq.	Sts.
A9999	Missing restoration	21223	Pem Molar 3 Surf Am	17	DOL		0	P
A9999	Missing restoration	23321	Pem Molar Comp/G...	46	M		0	P
			Estimated Total					

Approve Option

Print

Pt. Accept/Print

→ Update the Tx Plan Description Field accordingly (cannot remain titled “Copy of...”)

→ Make any necessary edits to Treatment Codes, add additional Problems and/or Diagnoses

○ Original Problem Codes cannot be changed or deleted but status can be updated to “Resolved”

Tx Plan Description: A9999 treatment plan

Chief Concerns:

Problems

Date	Problem	Site	Surf.	Status
06/01/2025	Broken amalgam	17	DOL	T-NURG
06/01/2025	Recurrent caries	46	M	T-NU
06/01/2025	Recurrent caries	45	MO	

New item

CONS Consult

IGNORE Ignore

REF Referral

RESOLV Resolved

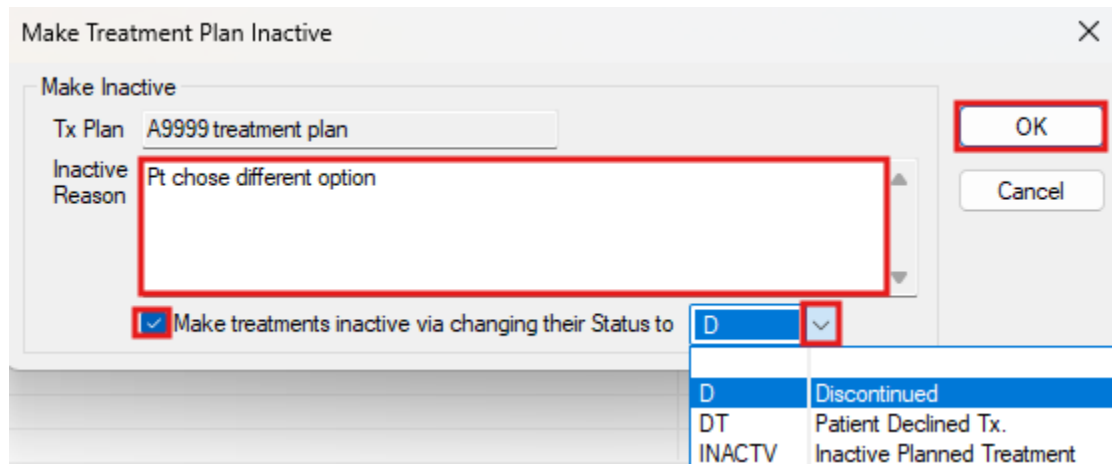
T-NURG Treat - Not Urgent

T-URG Treat - Urgent

WATCH Watch

→ Follow approval steps listed above (page 44-45)

→ Inactive the original Tx Plan by highlighting the record and selecting  *don't skip this step



Make Treatment Plan Inactive

Make Inactive

Tx Plan A9999 treatment plan

Inactive Reason Pt chose different option

☒ Make treatments inactive via changing their Status to

D DT INACTV

Discontinued Patient Declined Tx. Inactive Planned Treatment

OK Cancel

A pop-up window will appear to enter details of why treatment plan was inactivated

→ Enter details in Inactive Reason Field

→ “Check” the box “Make treatments inactive via changing their status”

→ Select accurate status from the dropdown list and select “ok”

Treatment Status Updates

Tooth# 46 - Edit Planned Treatment

Treatment

Provider: A9999 Date: 03/07/2025

Code: 23321 Unit: 0.00

Desc: Perm Molar Comp/GI 1S

Site: 46 M ☒ I/O ☐ D ☐ V/B ☐ L ☐

Details

Discipline

Phase Sequence 0

Diagnoses

Missing restoration
[New item](#)

Status

☒ Planned ☐ In Process ☐ Completed

User Audits

Entry User: Student, Test

Approval User: Card 1 (Do not Email), Orientation

OK Cancel

- Highlight the Treatment Code that requires a status update
- Select  to open the “Edit Planned Treatment” window
- Update the surface and status accordingly and select “ok”
- “Double click” on the Chart highlighted in turquoise **RAD013** to open the approval window

Patient Approvals - RADO'Malley, Sean (RAD559)

Criteria

☐ Requested Items ☒ Current User ☒ Current Date ☐ Type ☐ All Unapproved Items ☐ All Users ☐ All Dates ☒ All Types

Settings

☐ Check Out Patient

Reviews

☒ Billing Info ☐ Tx Amounts

Approve Cancel

Entries (Select the items to approve at this time)

Type	Date	Provider #	Code	Site	Surface	Description	Sts	Discipline	Phase	Diagnoses	User	Audit Date
Treatment	03/07/2025	A9999	23321	46	M	Perm Molar Comp/GI 1S	I	Oper	0	Missing restoration	T. Student	03/07/2025
Tx Plan	03/07/2025						0		0		T. Student	03/07/2025

User Authentication

Approval

Id

Password

OK Cancel

- By default all treatment, forms, and notes are highlighted for approval
- Highlight codes and ensure only codes reflective of the current clinical session are selected (all highlighted lines will be approved)

Grade Card

- After receiving approvals, Grade Card (Evaluation window) will appear
- Verify the Grade card “Form” and “Discipline” selected reflects the appropriate treatment for your appointment (incorrect Forms will affect grade reports)

Evaluation Information

Provider: A9999 Date: 03/08/2016

Discipline: 70 Form: PERIOD3

Academic Information

Evaluator: ☒ Instructor ☐ Provider

Instructor: Waller, Dave~

☐ Held For

OK Cancel

Questions and Grades

Question	Grade
Sessional Evaluation	
Accurate and Complete Medical History	
At least 6 teeth	
PSR 3 min 12 teeth probing depths => 4mm	

Grade Description

Grade	Description
3	Met Standard
4	Exceeded Standard
2	Below Standard
n	No Grade Required

Add another evaluation

Time (Hrs) Total RVU 0.60 View Other

Procedure	Site	Surf.	Stat.	Description	RVU	Question	Grade
1N100			I	New Perio Patie...	0.00	N/A	
1N100.1			C	Complete Perio ...	0.00	Comprehensive Exam, Diagnosis & TP	
					0.60	Organization of Treatment Area	
					0.00	Exam, Periodontal Charting & Rad findings	
					0.00	Plaque Control/OHI	
					0.00	Etiology, Periodontal Dx/Prognosis	
					0.00	Periodontal Treatment Plan	
					0.00	Professionalism	
					0.00	Understanding & Completion of Tx Visit	

- Once evaluation form is complete, another approval will be required

Medical Alerts:

- Allergy to Penicillin
- Atrial Fibrillation
- Bleeding Disorder- see chart
- High Cholesterol
- History of Angina Pectoris
- History of Autism
- History of Rheumatic Heart Disease; Proph AB Req'd; Fc
- History of thyroid dysfunction- see chart
- Organic Heart Murmur (Requires Proph AB/Current AHA
- Parameter

Tx History

Date	Prov./User	Code	Site	Surf.	Stat.	Pre-Au
11/07/25	T. Test	11113			C	
11/07/25	T. Test	23312	45	MO	C	
11/07/25	T. Test	23312	45	MO	I	Not R
11/07/25	T. Student	23323	36	MOD	C	
11/07/25	T. Student	23323	36	MOD	I	
16/07/25	T. Test	23322	36	MO	C	
22/07/25	I. Pesun	79941	14		E	
27/07/21	T. Student	012PH1			C	
09/07/25	R. Rajput	Note	11			
18/12/14	T. Student	SPT1_6			RC	

Context Menu:

- Add Tx Note...
- Edit Tx Note...
- Add/Edit Tx Form...
- Add Lab Procedure...
- Add Lab Order...
- Edit Lab Order...
- Complete Treatments
- In Process Tx Visit
- Assign Phase/Seq...
- Additional Tx Info...
- Show PreAuthorization Information...
- Tx Consent History...
- View Missing Required Consents...
- Print Labels...
- Add Student Eval...

- If your instructor is unable to provide you with a grade, you can resume at a later time by “right-clicking” on the complete treatment code and selecting “Add Student Eval...”

Chart Add

- Use the "Chart Add" tab ONLY to add a newly planned procedure code that is being completed today and was not part of the initial Treatment Plan. (ie:0100.5 – Pt Cancelled/insufficient notice, 01101A Screening etc.)
- You will also add the existing findings during examination in this tab
- Please use the Chart Add tab carefully - Once you complete and approve a code in this tab, you cannot modify or delete
- To modify or delete, you must complete an axiUm Correction Card (found in Forms Tab)

EHR - Chart / Chart Add - RAD01ajuwon, Hakeem (RAD013)

18 P 17 P 16 P 55 P 14 13 12 11 21 22 23 P 24 P 25 P 26 27 P 28

48 47 46 45 44 43 42 41 31 32 33 34 35 36 37 38

Alerts Problems Objectives

Medical Alerts:

- *Current Medications
 - History of depression or psychiatric disorder
 - Pt. is an Asthmatic
 - Recreational Drug User

Patient Alerts:

- Dental Hygiene 2 Only

Patient Needs:

- Needs Bridge(s)
- Needs RPD (Dent 3)

Tx History Tx Plans Forms Attachments/Consents Perio **Chart Add**

Criteria 0100.

Quick List Full List Search

Dental Tx

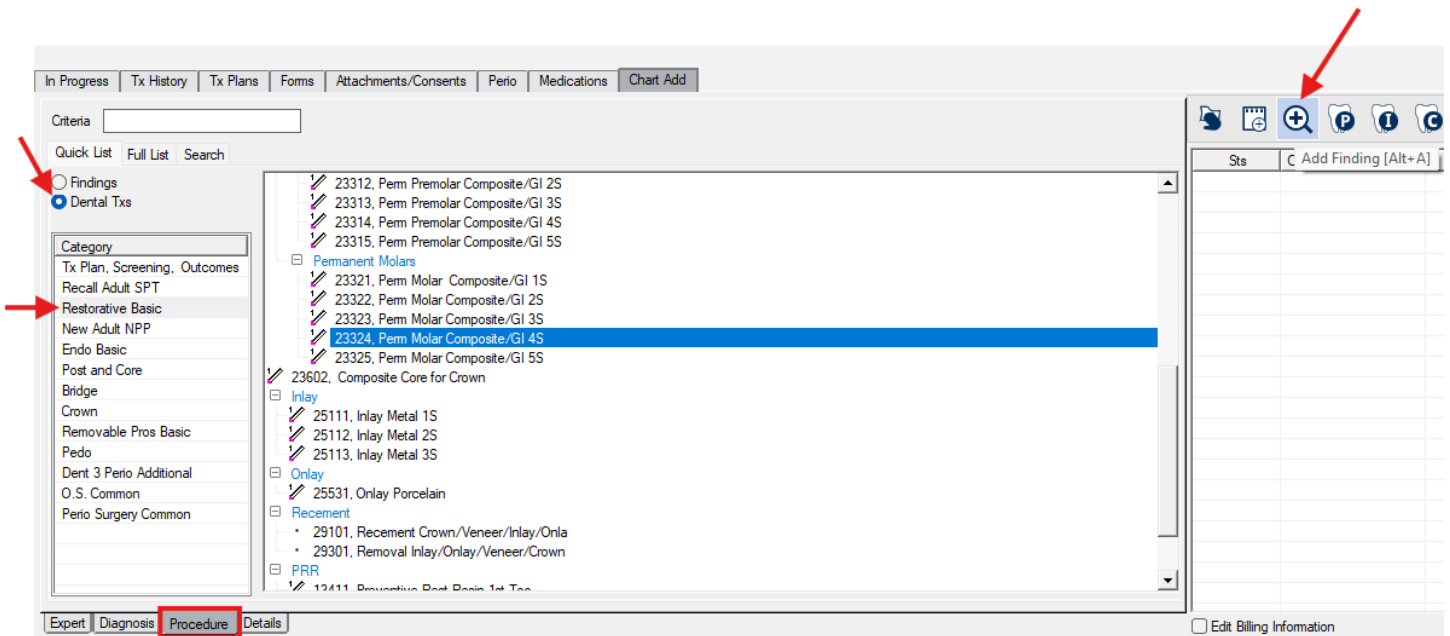
Category

- Tx Plan, Screening, Outc...
- Recall Adult SPT
- Restorative Basic
- New Adult NPP
- Endo Basic
- Post and Core
- Crown

- 01205, Emergency Examination
- Pedo Tx, Planning Codes
- 01102, Pedo Exam and Treatment Plan
- Screening
 - 01101A, Screening Comprehensive Care: Accepted
 - 01101AG, Screening/Registration: Accepted (govt insur)
 - 01101U, Screening/Registration: Not accepted
 - 01101L, Screening/Registration LIMITED Treatment /REFERR.
- Patient Canceled/Failed Appointment
 - 0100.V, Patient Failed to Show
 - 0100.5, Pt Canceled /insuff'nt notice**
- Patient Management

Sts Code Site Surface Phase Description

- Select Chart Add Tab
- Select Quick List
- Choose appropriate category to populate list of corresponding Procedure Codes
- Highlight Procedure Code
- Select status



- Select Chart Add Tab
- Select Quick List
- Choose appropriate category to populate list of corresponding Procedure Codes
- Highlight Procedure Code
- Select  to add Finding

Forms

The screenshot shows the 'Forms' tab selected in the top navigation bar. The 'Add Form' dialog box is open, displaying a list of form types in a dropdown menu. The 'OK' button is highlighted. The 'Forms on File' list on the right shows various forms, including 'DH Assessment Summary', 'General Referral Form', 'MDA Implant Pgm Sub Cmte Form', 'Medical History', 'O Path Consult Referral&Report', 'Radiology Request Form', and 'TX Plan Form'.

- In Forms Tab select  to add a form
- Select form type from the dropdown list and select “ok”

The screenshot shows the 'Referral' form in the software interface. The form is titled 'Referral Form' and contains several fields for patient information and clinical details. The 'Referral' tab is selected. The 'Forms on File' list on the right shows various forms, including 'DH Assessment Summary', 'General Referral Form', 'MDA Implant Pgm Sub Cmte Form', 'Medical History', 'O Path Consult Referral&Report', and 'Radiology Request Form'.

- Answer question fields
- Fields highlighted pink are mandatory to answer, answering all fields provides the best detail

****Where to Action Your General Referral Form****

Grad Prosthodontics (Associate Dean)

Grad Periodontics (Associate Dean)

Clinic Director (Clinic Director)

Undergrad Implant Program (PCC Leads)

Grad Oral Surgery (Associate Dean)

UG Oral Surgery (Reception Staff)

TMD (Reception Staff)

Sleep Apnea Clinic (Reception Staff)

UG patient assignment (PCC Leads)

Grad Orthodontics (Associate Dean)

ALL Pediatric referrals (Pediatric Coordinator)

- Scroll to bottom of form for instruction on where to “Action”
- Select  “Add Action”
- Add Form Action window will popup

Add Form Action

Comment

Status: OPEN

Assigned To

Message Group

User: Test, Test

OK

Cancel

- Start by removing your name from the User Field by selecting 
- If this step is missed your form will sit unattended to in axiUm causing delays in patient management

Add Form Action

Comment

Status: CLOSE

Assigned To

Message Group

User

OK

Cancel

Message Groups

Group: PCCL

Description: PCC Leads

Group	Description
H21	Hygiene Class of 2021
CBCTR	CBCT Reports
RECEP	Reception Staff
SP_STF	Specialty Clinic Staff
ADEAN	Associate Dean
GPSTAF	Graduate Periodontics Staff
OS_STF	Grad Oral Surgery Staff
CSUPPLY	Clinic Supply Group
D4IMPI	Dent 4 Implant Instructor
CSSFIN	CSS Financial Group
PEDO	Pediatric Coordinator
PCCL	PCC Leads
D25	Dentistry Class of 2025
IMP	Implant Coordinator group
H25	Hygiene Class of 2025
GPROSR	Grad Prostho Residents

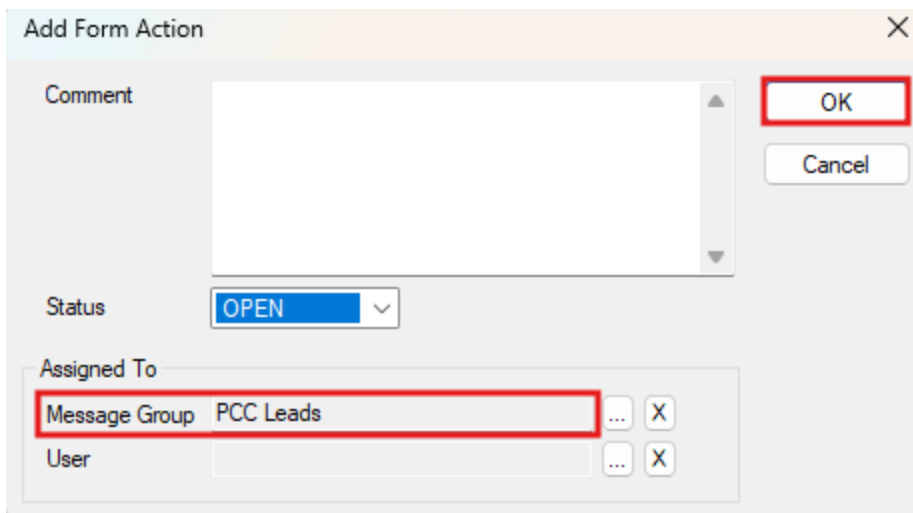
Security Level	Member Name
Administrator	Bhopalsingh (PCC LEAD), Marta
Administrator	Tokar (PCC LEAD), Carley

patient requires sedation dental work
N

Surgery or Grad Oral Surgery? n/a

relevant to Dx and Tx). test test

- Select ellipsis for Message Group Field
- A window will pop up with a listing of the available Message Groups
- Highlight the accurate Message Group as indicated on the Form instructions (receiving user list will appear)
- “Double Click” on the highlighted Message Group



The 'Add Form Action' dialog box contains the following fields and controls:

- Comment:** A large text area for entering a comment.
- Status:** A dropdown menu currently set to 'OPEN'.
- Assigned To:** A section with two rows:
 - Message Group:** A dropdown menu currently set to 'PCC Leads'.
 - User:** A dropdown menu.
- Buttons:** 'OK' and 'Cancel' buttons are located in the top right corner.

- Add Form Action window will popup
 - Verify correct Message Group was selected
- Select “ok”

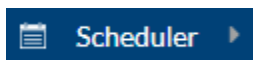
Tx History Tx Plans Forms Attachments/Consents Perio Chart Add					
Form #	Date	Description	Status	User	Assigned To
122226	29/01/2015	General Referral Form	OPEN	Redekop, Christopher	
122378	30/01/2015	General Referral Form	CLOSE	Salas Chavez, Daleska	Grad Oral Surgery Staff
131468	16/04/2015	General Referral Form	CLOSE	Rabkin, Linda	
139190	03/09/2015	General Referral Form	OPEN	Redekop, Christopher	Redekop, Christopher
139191	03/09/2015	General Referral Form	OPEN	Waller (Administrator), David	Redekop, Christopher
140371	14/09/2015	General Referral Form	OPEN	Waller (Administrator), David	Waller (Administrator), David
146875	02/11/2015	General Referral Form	OPEN	Krebs, Denise	Krebs, Denise
148160	09/11/2015	General Referral Form	OPEN	Krebs, Denise	Krebs, Denise
151640	09/12/2015	General Referral Form	OPEN	Redekop, Christopher	Redekop, Christopher
200349	17/01/2017	General Referral Form	OPEN	Redekop, Christopher	Redekop, Christopher
201804	23/01/2017	General Referral Form	OPEN	Redekop, Christopher	Redekop, Christopher
210462	24/02/2017	General Referral Form	OPEN	Redekop, Christopher	Redekop, Christopher
253502	10/08/2018	General Referral Form	OPEN	Rodriguez (PCC LEAD), Tristyn	Rodriguez (PCC LEAD), Tristyn
258702	09/10/2018	General Referral Form	OPEN	King, Catherine	King, Catherine
276458	22/05/2019	General Referral Form	OPEN	Cabralles, Javier	Cabralles, Javier

Forms on File

- ESTHETIC ZONE ASSESSME
- Fee Waiver / Adjustment Form
- GP > UG Referral & Initial Rpt
- GP Appointment Record
- GP Surgical Implant Consult
- GP-Extraoral & Intraoral Exam
- General Referral Form**
- 29/01/2015
- 30/01/2015
- 16/04/2015
- 03/09/2015
- 03/09/2015
- 14/09/2015
- 02/11/2015
- 09/11/2015
- 09/12/2015

- To review the status of a Form “click” on the Form Type
- A listing of details will appear to the left
 - If your form was not actioned correctly and is still assigned to yourself, please complete the steps above

Scheduler



→ Select  Book icon to view and select either the Main Clinic or Radiology Book

There are two views in the scheduler window:

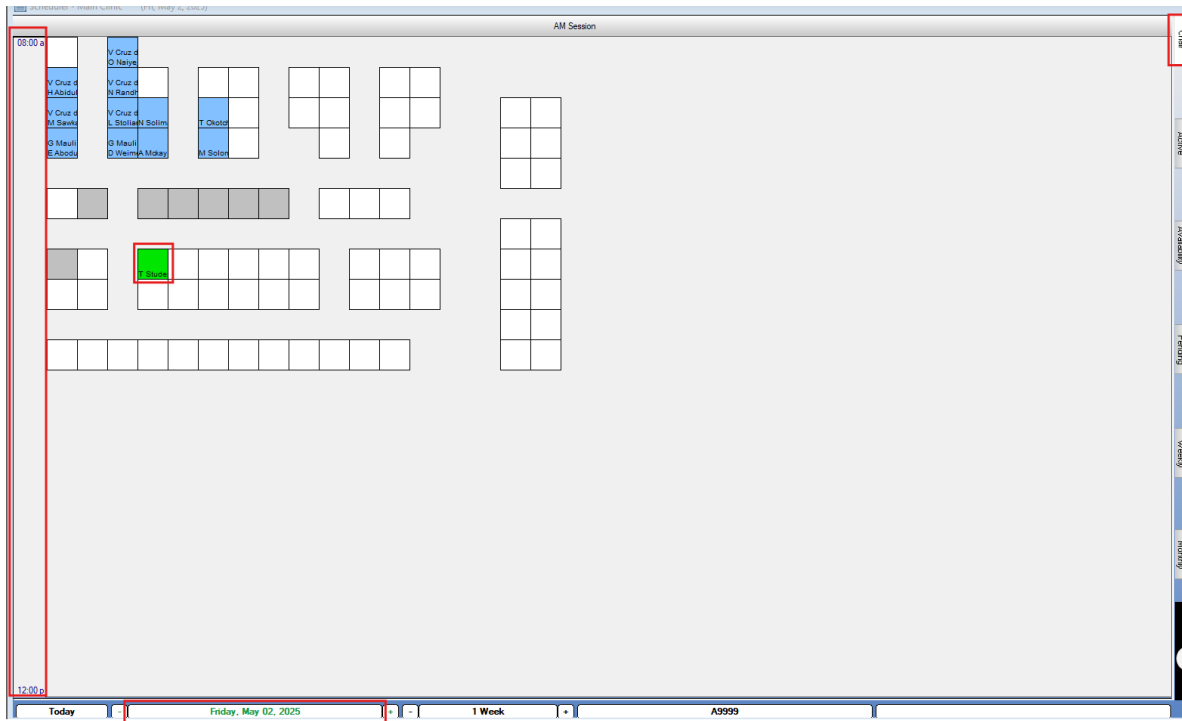
- The Chair Tab allows you to view your assigned chair in Main Clinic layout
- The Active Tab is used to schedule your patient

The screenshot shows the 'Scheduler - Main Clinic' window for Monday, August 27, 2018. The main area displays a grid of appointments. A red arrow points to the '09:00 a' time slot on the left, labeled 'DEFAULT'. Another red arrow points to the '12:00 p' time slot at the bottom left. The right sidebar contains tabs for 'Chair', 'Active', and 'Availability', with the 'Chair' tab selected. The bottom navigation bar includes buttons for 'Today', 'Monday, August 27, 2018', '1 Week', and a '<Select Provider>' dropdown.

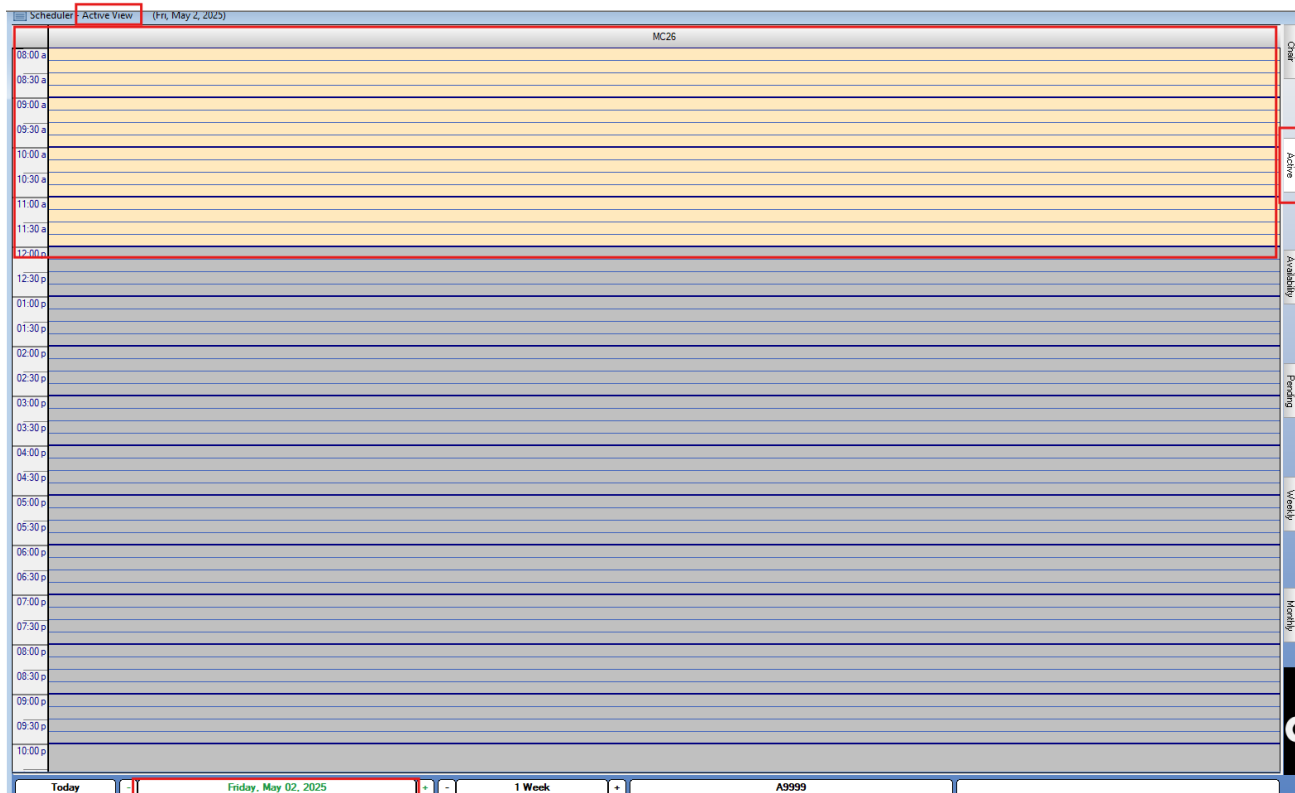
- All chairs have been assigned based on the rotation schedule
- Only book into a unit that is assigned to you, if you are unsuccessful at locating your assigned chair, inquire with Rotation Coordinator

To book an appointment in Main Clinic:

→ Open the chair view to locate assigned chair on appropriate date (hovering over the chair will display chair number)



→ Once desired chair is located, “click” on the Active Tab



→ “Left click” on the available session (Yellow is available, Grey is unavailable) selecting the correct start time of either 8:30am or 1:30pm, Select Patient window will populate

Scheduler - Active View (Fri, May 2, 2025)

MC26

08:00 a
08:30 a
09:00 a
09:30 a
10:00 a
10:30 a
11:00 a
11:30 a
12:00 p
12:30 p

Select Patient

Rad, Ka

Name	Chart #	Home Phone	Work Phone	Birth Date
RADAbdul-Jabbar, Kareem (U75)	RAD018	(204) 123-4567	(123) 123-4567	2/7/1950

RADar, Doppler
RADars, Oklund
RADdentTwo, GroupA
RADdentTwo, GroupB
RADdentTwo, GroupC
RADdentTwo, GroupD
RADmond, Yutta
RADreed, Wills
RADriguez, Ivan

→ Search your patient and “double click”

New Appointment

Patient
RADAbdul-Jabbar, Kareem (RAD018)
12345 Dental Way
Winnipeg, MB, R3Q2E2
Home (204) 123-4567
Work (204) 123-4567
Mobile (204) 806-1510
Other (204) 123-4567
Contact Home

Pt Information
Pt Status Active
Time
Pref. Time 8:30 AM
Pt Now Due 0.00
Estimate
Tx Plan Total 0.00

Appointment
Provider A9999
2nd Provider
Appt. Code * All Session *
Tx Discipline Oper
Rank
Appt Details
Time Fri, May 2, 2025
08:30 am to 11:30 am
Chair MC26
Made on Tue, Jul 22, 2025
Last user
NOT CONFIRMED Confirm

Reason 14 O Operative

Provider Time (Minutes)
Other Provider Other Provider Other Provider Total
180 180
Exclusive Provider Time No Sched. 2nd Provider For

Accept
Cancel
Tx. Plan...
Recalls...
Pt Check in
Pt Check out
Check out
Reschedule
Failed
Cancelled
Notes...
Pt. Times...

- Appt. Code: Select *All Session* from the drop down list
- Tx Discipline: Select appropriate discipline for your session
- Appt Details: Confirm your booking is correct as this information will be sent to your patient automatically (If a booking is entered incorrectly, you must call and notify the patient of this error as rescheduled or cancelled reminders are not sent to the patient)
- Reason: Enter details of session

→ Select Tx Plan button to open patient's current In Process and Planned Tx list

New Appointment [X]

Patient
 RADAbdul-Jabbar, Kareem (RAD018)
 12345 Dental Way
 Winnipeg, MB, R3Q2E2

Home (204) 123-4567
Work (204) 123-4567
Mobile (204) 806-1510
Other (204) 123-4567
Contact Home

Pt Information
Pt Status Active
Time
Pref. Time 8:30 AM

Pt Now Due 0.00
Estimate
Tx Plan Total 0.00

Reason 14 O Operative

Appointment
Provider A9999
2nd Provider
Appt. Code * All Session *
Tx Discipline Oper
Rank

Appt Details
Time Fri, May 2, 2025
 08:30 am to 11:30 am
Chair MC26
Made on Tue, Jul 22, 2025
Last user

NOT CONFIRMED [Confirm]

Tx. Plan... [Recalls...]
 [Pt Check in]
 [Pt Check out]
 [Check out]
 [Reschedule]
 [Failed]
 [Cancelled]
 [Notes...]
 [Pt. Times...]

Provider Time (Minutes)

Other	Provider	Other	Provider	Other	Provider	Total
-------	----------	-------	----------	-------	----------	-------

Appointment Treatments

RADAbdul-Jabbar, Kareem - Birthdate: 02/07/1950 (U75)

Planned Treatments

Provider	Phase	Code	Site	Surface	Status	Description	Appt Date	Pre-Auth
A9999	0	02112			I	Two Images	12/09/2014	Not Req'd
A9999	0	01201			I	Comprehensive Exam...		Not Req'd
A9999	0	01201			I	Comprehensive Exam...		Not Req'd
A9999	0	27205.3	36		P	Ceramic Crown IS - Tr...		
A9999	0	27205.4	36		P	Ceramic Crown IS - C...		
A9999	0	1N300			I	New Perio Patient Pa...		Not Req'd
A9999	0	1N300.2			P	Scaling		
A9999	0	27205	36		I	Ceramic Crown Impla...		Not Req'd
A9999	0	27205.2	36		I	Ceramic Crown IS - Im...		
A9999	0	21211	14	O	P	Prem Ant/Pre 1 Surf Ap...		Not Req'd
A9999	0	33121.B	42		P	Access/Flap		
A9999	0	33121.C	42		P	Instrumentation		
A9999	0	33121.D	42		P	Obturation		
A9999	0	1N300			I	New Perio Patient Pa...		Not Req'd
A9999	0	1N300.2			P	Scaling		
A9999	0	02144			P	BiteWings 4 Films		Not Req'd
A9999	0	27201	15		I	All Ceramic Crown (A...		Not Req'd
A9999	0	27201.1	15		P	Porcelain Crown Prep		
A9999	0	27201.2	15		P	Porc/Ceram. Cr. Final		
A9999	0	27201.3	15		P	Porc/Ceram. Cr. Try-In		
A9999	0	27201.4	15		P	Porc/Ceram. Cr. Cem...		
A9999	0	02112			P	Two Images		Not Req'd
A9999	0	1N300.2			P	Scaling		
A9999	0	1N106			I	New Perio Patient Pa...		Not Req'd
A9999	0	1N106.2			P	Scaling 1 Unit		
A9999	0	1N300			I	New Perio Patient Pa...		Not Req'd
A9999	0	1N300.1			I	Complete Perio Exam...		
A9999	0	33111.C	11		P	Instrumentation		
A9999	0	33111.D	11		P	Obturation		
A9999	0	69022			P	Mid Pt. Edent. Fixed Im...		Not Req'd
A9999	0	33121	42		I	RCT 2 Canals		Not Req'd
A9999	0	L25711	45		I	Lab - Cast Metal Post...		Not Req'd
A9999	0	33111	11		I	RCT 1 Canal		Required
A9999	0	27305.2	47		P	FMC IS - Impression/...		
A9999	0	27305.3	47		P	FMC IS - Try-In		

Hide Inactive Treatments

Appointed Treatments

Provider	Phase	Code	Site	Surface	Status	Description	Pre-Auth
----------	-------	------	------	---------	--------	-------------	----------

→ Select the In Process or Planned Tx(s) that are intended for the appointment being booked and click on arrow  to move the treatment to the Appointment Treatments side (Treatment can be moved back to the Planned Treatment side if needed)

→ Close window and click Accept

08:00 a	
08:30 a	RADAbdul-Jabbar, Kareem (U75) (RAD018) * All Session * - Three Hours, Main Clinic, MC26, .
09:00 a	14 O Operative (204) 123-4567 (H)
09:30 a	
10:00 a	
10:30 a	
11:00 a	
11:30 a	

- Patient is now scheduled in your chair

08:30 a	RADAbdul-Jabbar, Kareem (U75) (RAD018) * All Session * - Three Hours, Main Clinic, MC26, .
09:00 a	14 O Operative (204) 123-4567 (H)
09:30 a	
10:00 a	
10:30 a	
11:00 a	
11:30 a	
12:00 p	
12:30 p	
01:00 p	
01:30 p	
02:00 p	
02:30 p	
03:00 p	
03:30 p	
04:00 p	
04:30 p	
05:00 p	

Patient Card...
Select Patient
Show History...
Dial Patient

Patient Approvals

Patient Check In
Undo Patient Check In
Patient Check Out
Undo Patient Check Out
Patient Check In Form
Patient Seated
Undo Patient Seated

Chart Request
Patient Recalls
Appointment Treatments
Notes

Reschedule
Edit
Cancel
Failed
Delete

→ “Right click” on the appointment to make a change

Patient Check In: Must check in patient when they arrive to appointment

Patient Check Out: Must check out patient prior to escorting to reception

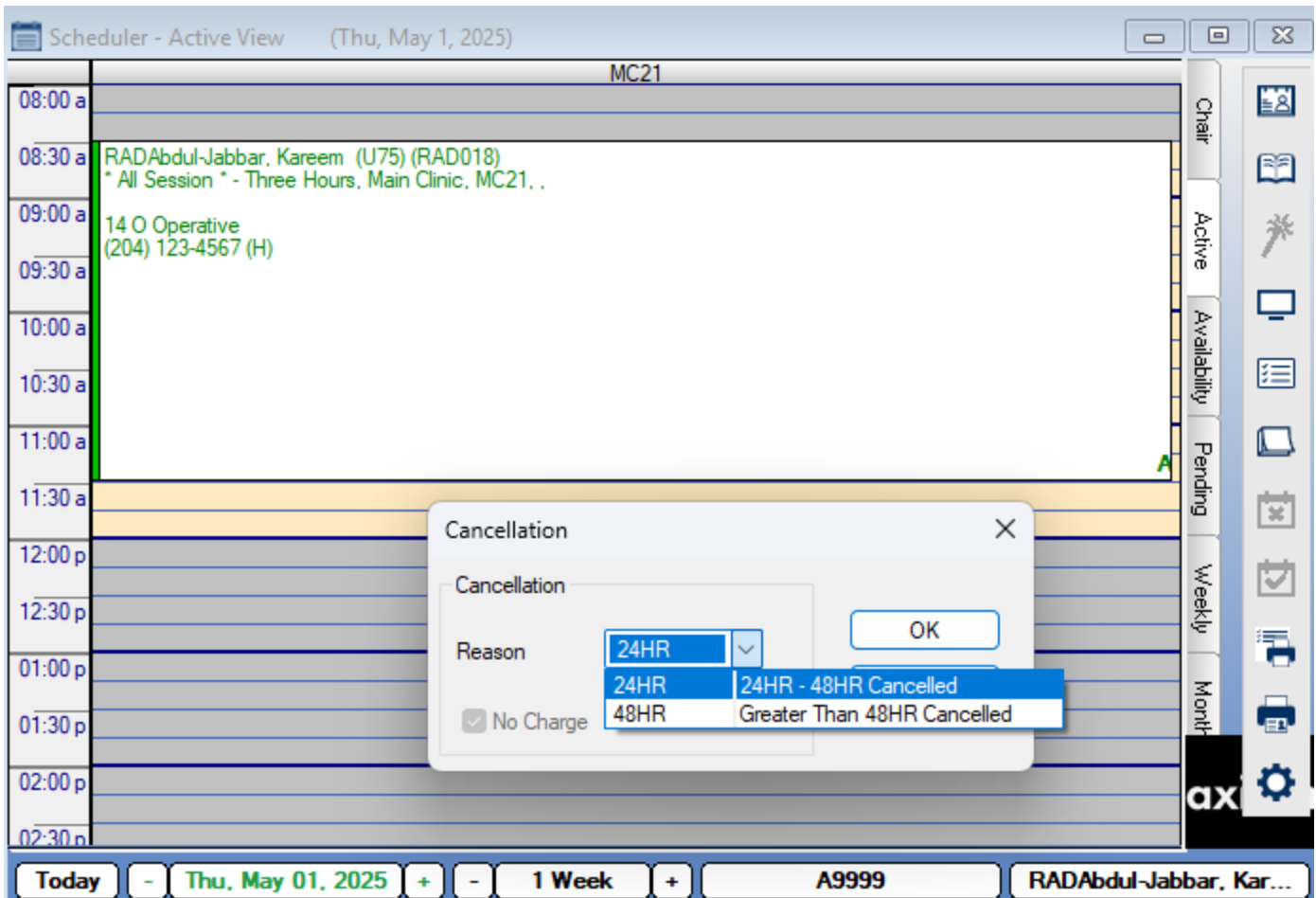
Scheduler - Active View (Fri, May 2, 2025)	
08:00 a	MC26
08:30 a	RADAbdul-Jabbar, Kareem (U75) (RAD018) * All Session * - Three Hours
09:00 a	14 O Operative (204) 123-4567 (H)
09:30 a	
10:00 a	
10:30 a	
11:00 a	
11:30 a	
12:00 p	
12:30 p	
01:00 p	
01:30 p	
02:00 p	
02:30 p	

Today - Fri, May 02, 2025 + - 1 Week + A9999 RADAbdul-Jabbar, Kar...

Reschedule: This appointment card will change from white to yellow, allowing you to move the appointment to another session (details on appointment card will not have to be updated)

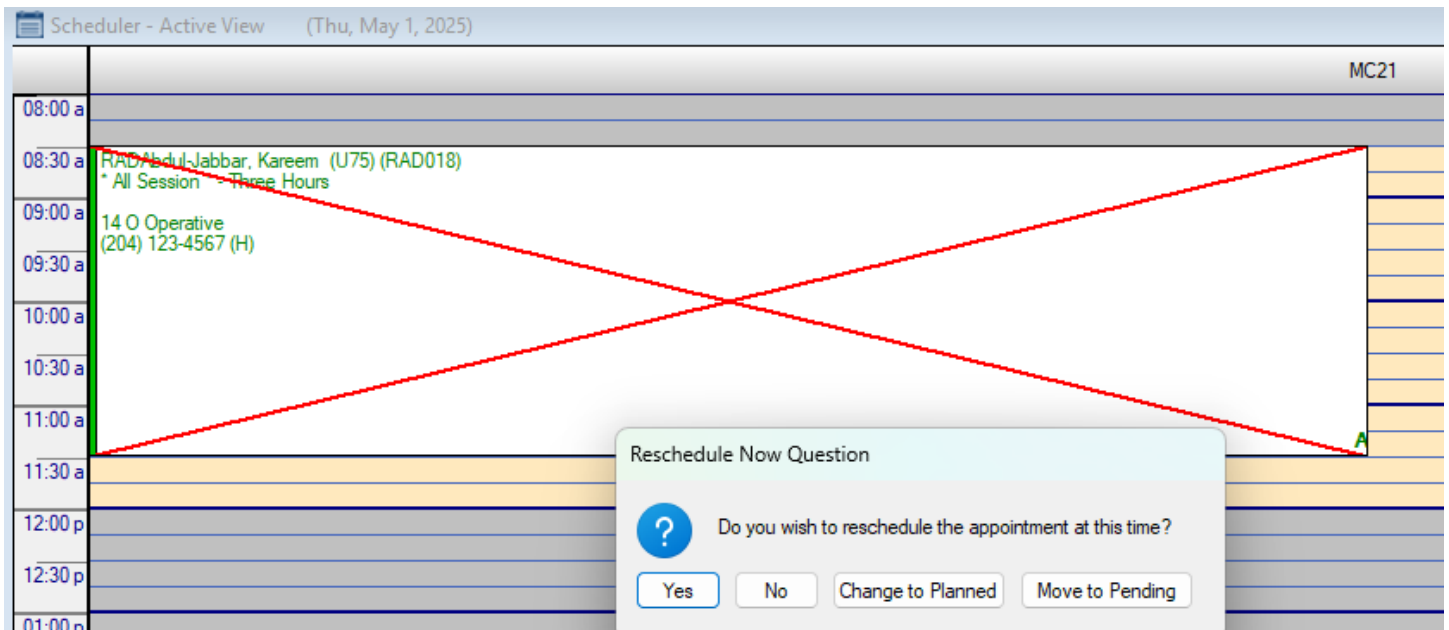
- After alternative date is chosen, “double click” the start time of available(yellow) session (8:30am or 1:30pm) to schedule

Edit: To update/change appointment details, select Accept once completed

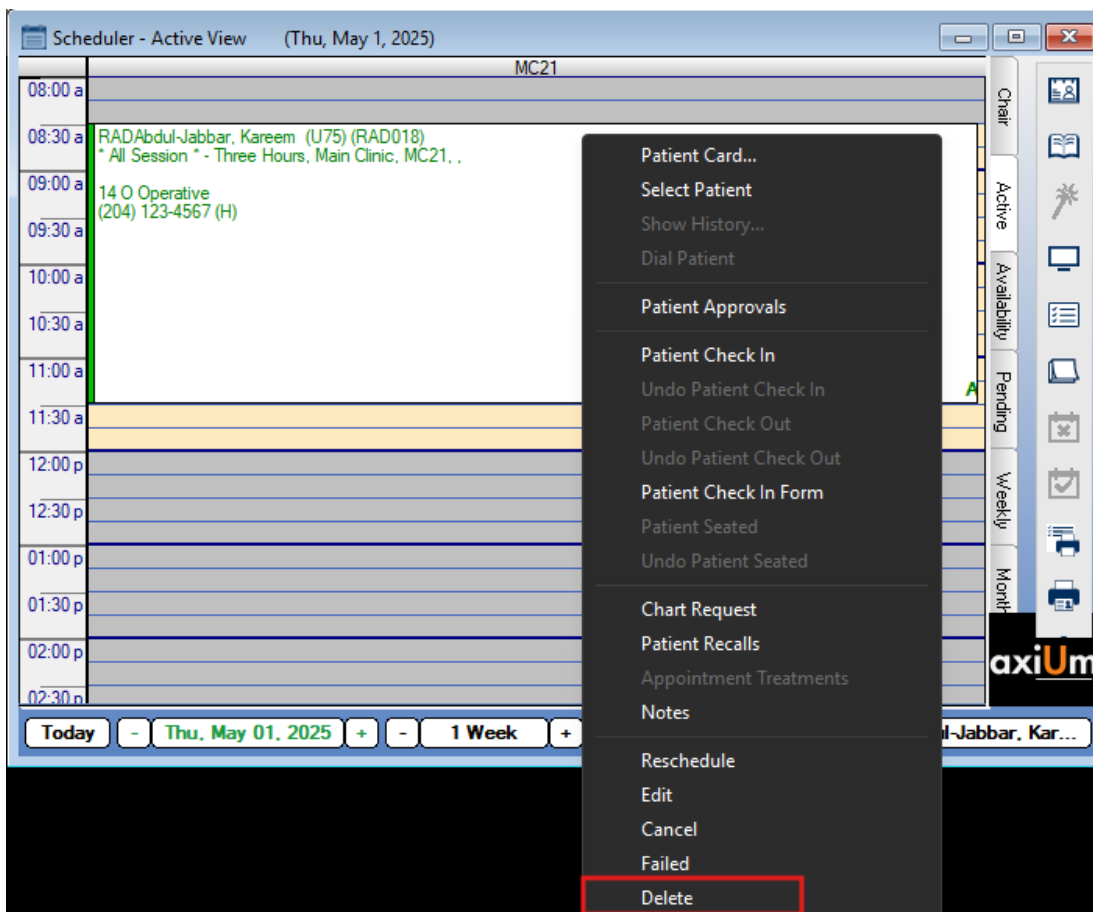


Cancel: Select the appropriate reason from the drop down list

- 24HR: Cancelled between 24HR-48HR of appointment time (insufficient notice)
- 48HR: Cancelled with 48HR or more from appointment time
- Providing more than two days notice is reasonable unless patient is delaying frequently



Failed: If patient cancels with less than 24 hours notice or no shows



Delete: Appointment may need to be deleted if scheduled in error or if appointment changes at no fault of the patient (i.e. denture case was not returned by the lab in time)

Patient Card - RADAbdul-Jabbar, Kareem (RAD018)

Chart IN
Pt Type Virtual Patient-data only temp

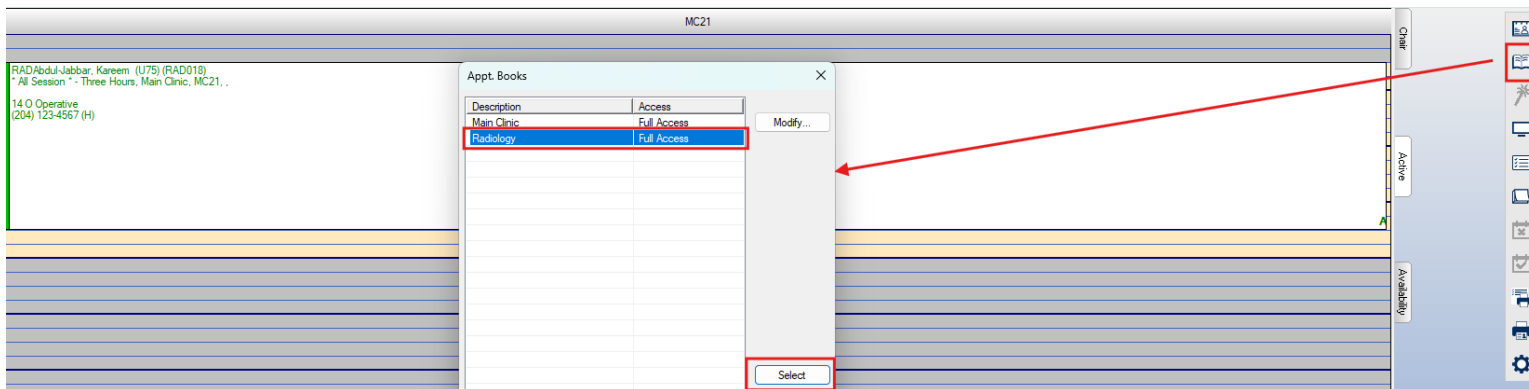
RADAbdulJabbar, Kareem 02/07/1950 12345 Dental Way Winnipeg, MB R3Q2E2		*Home # (204) 123-4567 Work # (204) 123-4567 Mobile # (204) 806-1510 Other # (204) 123-4567 Other Loc Time		Chart RAD018 Area Status Active ID. Provider Access Free			
Insurance CDCP Employer Subscriber # 12345 Group 333333 Holder RADAbdulJabbar, Kareem Coverage CDCP 100%		CDCP 12345 333333 RADAbdulJabbar, Kareem CDCP 60%		Patient's Physician Emergency Contact RADabulJames, Tris (204) 123-4567 Relation Daughter Manager		Last Visit 11/07/2025 Last Recall 15/05/2025 Next Recall 01/08/2025 Next Appt Pending Last Stmt. 07/07/2023	

Alert	4LM		5PM			Current	> 30	> 60	> 90	> 120	Total
Office	2DENA	5GPERS	PROSP	5GPERS	4RDHTX	Patient	0.00	0.00	0.00	0.00	0.00
Custom	FRENCH	EMVOTX				Pmt Plan	0.00	0.00	0.00	0.00	0.00
Custom						Insurance	0.00	0.00	0.00	0.00	0.00
						Total Due	0.00	Next Fee	N/A	0.00	Now Due

Type	Date	Time	Clinic	Provider	Provider Name	Code	Reason	Wait Li
Failed	09/12/...	01:30 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...	dh assessment	No
Cancelled	09/12/...	01:30 p - 04:...	Main Clinic	A9999	Student, Test	* All Ses...	24HR - 48HR ...	
Deleted	06/01/...	02:00 p - 03:...	Main Clinic	A9999	Student, Test	One Hour		No
Deleted	10/01/...	02:00 p - 03:...	Main Clinic	A9999	Student, Test	* All Ses...		No

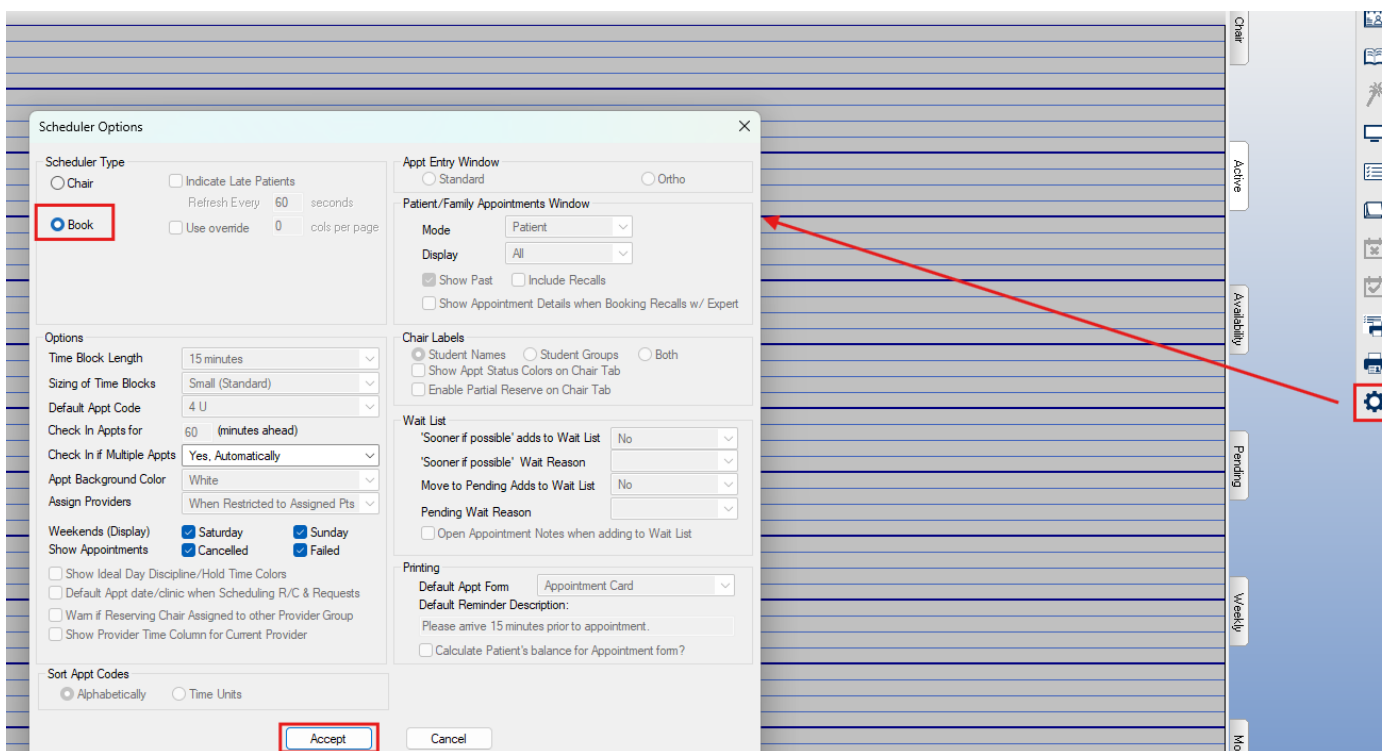
- Appointment type must accurately reflect attendance history as this is monitored to remain a patient at the college. Be sure to always update the appointment type accordingly.

Chair Booking in Radiology



To book your current patient in Radiology:

→ Select the  Book Icon, highlight radiology and “click” select to open the schedule



→ Select the  settings icon

→ Switch the Scheduler Type to Book and “click” Accept

Scheduler - Radiology (Fri, Sep 5, 2025)

	D118A	D118B	D118C	D118D	CBCT	Pan/Ceph	Rad Consu	Rotations
09:00 a								
09:30 a								
10:00 a								
10:30 a								
11:00 a								
11:30 a								
12:00 p								
12:30 p								
01:00 p								
01:30 p								
02:00 p								
02:30 p								
03:00 p								
03:30 p								

Chair Active Availability Pending Weekly Month axiUm

- Radiology request form must be completed/approved prior to booking radiology appointments
See page 26

→ To book an appointment for Periapical/Bitewing xrays, only schedule one unit of time (15 minutes) in columns D118A – D118D

→ To book an appointment for Panoramic xrays, only schedule two units of time (30 minutes) in column Pan/Ceph

- Do not schedule any appointments in any other columns

Scheduler - Radiology (Fri, Sep 5, 2025)

	D118A	D118B	D118C	D118D	CBCT	Pan/Ceph	Rad Consu	Rotations
09:00 a								
09:30 a								
10:00 a								
10:30 a								
11:00 a								
11:30 a								
12:00 p								
12:30 p								
01:00 p								
01:30 p								
02:00 p								
02:30 p								
03:00 p								
03:30 p								

New Appointment

Patient: RADAbdul-Jabbar, Kareem (RAD018)
 12345 Dental Way
 Winnipeg, MB, R3Q2E2

Home (204) 123-4567
 Work (204) 123-4567
 Mobile (204) 806-1510
 Other (204) 123-4567
 Contact Home

Pt Information
 Pt Status Active
 Time
 Pref. Time 8:30 AM

Pt Now Due 0.00
 Estimate
 Tx Plan Total 0.00

Appointment
 Provider A9999
 2nd Provider
 Appt. Code 15 Minutes
 Tx Discipline Radiology
 Rank
 Appt Details
 Time Fri, Sep 5, 2025 10:00 am to 10:15 am
 Chair D118A
 Made on Fri, Jul 25, 2025
 Last user
 NOT CONFIRMED Confirm

Reason 2 PAs

Provider Time (Minutes)

Accept Cancel Tx. Plan... Recalls... Pt Check in Pt Check out Check out Reschedule Failed Cancelled Notes... Pt. Times...

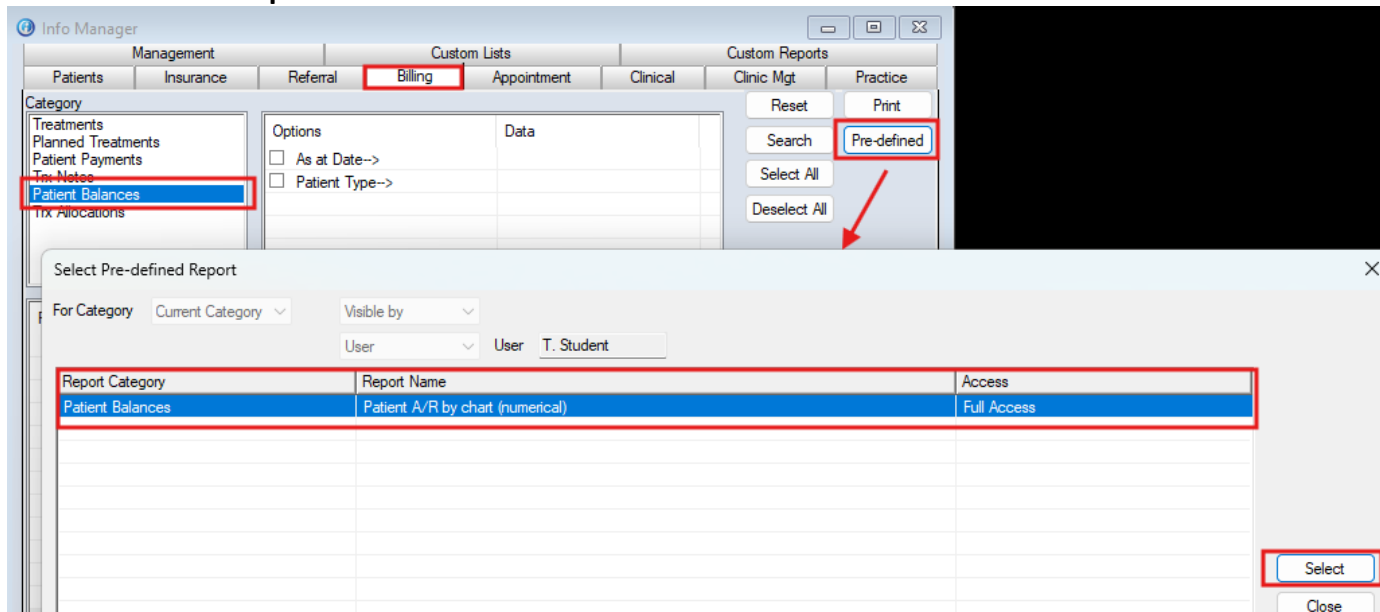
- Appt. Code: Select *15 minutes or 30 minutes* from the dropdown list according to x-ray type
- Tx Discipline: Select *Radiology*
- Appt Details: Confirm your booking is correct
- Reason: Enter details of x-rays to be taken

Info Manager

Info Manager

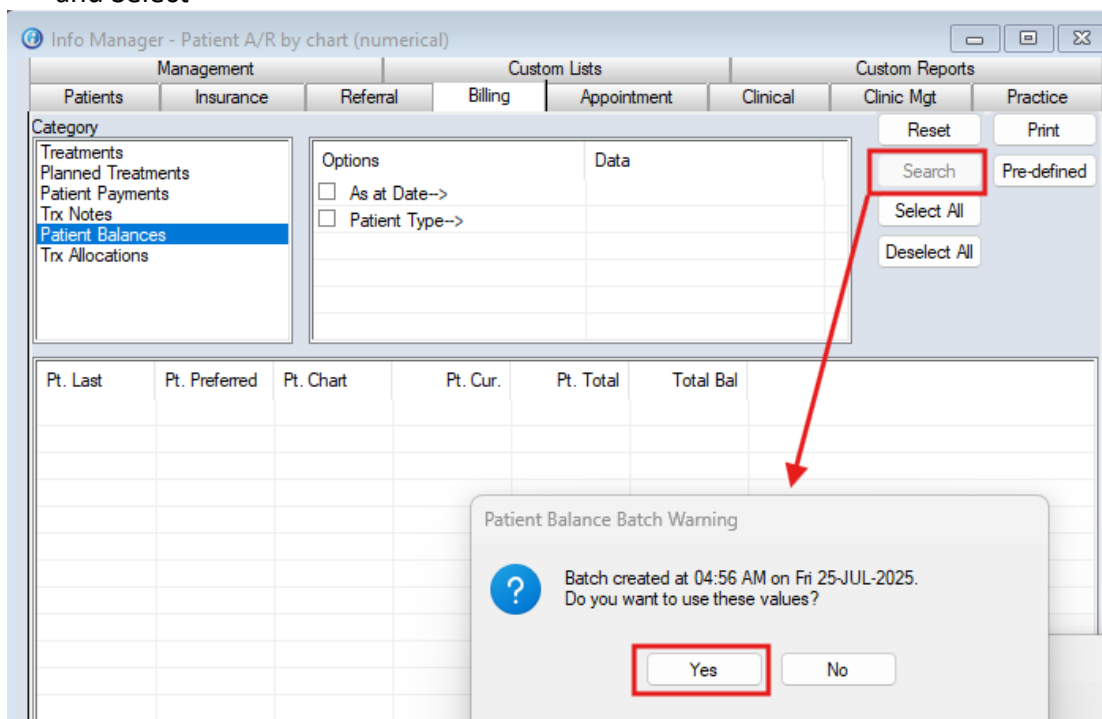
- The Info Manager is used to view reports of patient information
- These reports can be used to track your progress throughout the year and prepare yourself for clearance
- Pre-defined reports have been created for students to view information such as Patient Balances, Incomplete Forms, Your Planned, In Process, and Complete procedures

Patient Balances Report



→ Select Info Manager

→ Select Billing, Patient Balances, Pre-defined, window will populate with the report "Patient A/R by chart" and Select



→ Select Search, window will populate with a warning, "click" yes

Info Manager - Patient A/R by chart (numerical)

Management Custom Lists Custom Reports

Patients Insurance Referral Billing Appointment Clinical Clinic Mgt Practice

Category

Treatments
Planned Treatments
Patient Payments
Trx Notes
Patient Balances
Trx Allocations

Options

☐ As at Date-->
☐ Patient Type-->

Data

Reset Print
Search Pre-defined
Select All
Deselect All

Pt. Last	Pt. Preferred	Pt. Chart	Pt. Cur.	Pt. Total	Total Bal
☐ Sample	Chart	000010	0.00	440.00	440.00
☐ Sample	Planning	000013	0.00	0.00	0.00
☐ Ralph	RADSamp...	RAD030	0.00	0.00	0.00
☐ Exan	Teddy	T1	0.00	0.00	0.00

- Patient balances will populate

Info Manager - Patient A/R by chart (numerical)

Management Custom Lists Custom Reports

Patients Insurance Referral Billing Appointment Clinical Clinic Mgt Practice

Category

Treatments
Planned Treatments
Patient Payments
Trx Notes
Patient Balances
Trx Allocations

Options

☐ As at Date-->
☐ Patient Type-->

Data

Reset **Print**
Search Pre-defined
Select All
Deselect All

Pt. Last	Pt. Preferred	Pt. Chart	Pt. Cur.	Pt. Total	Total Bal
☒ Sample	Chart	000010			
☒ Sample	Planning	000013			
☒ Ralph	RADSamp...	RAD030			
☒ Exan	Teddy	T1			

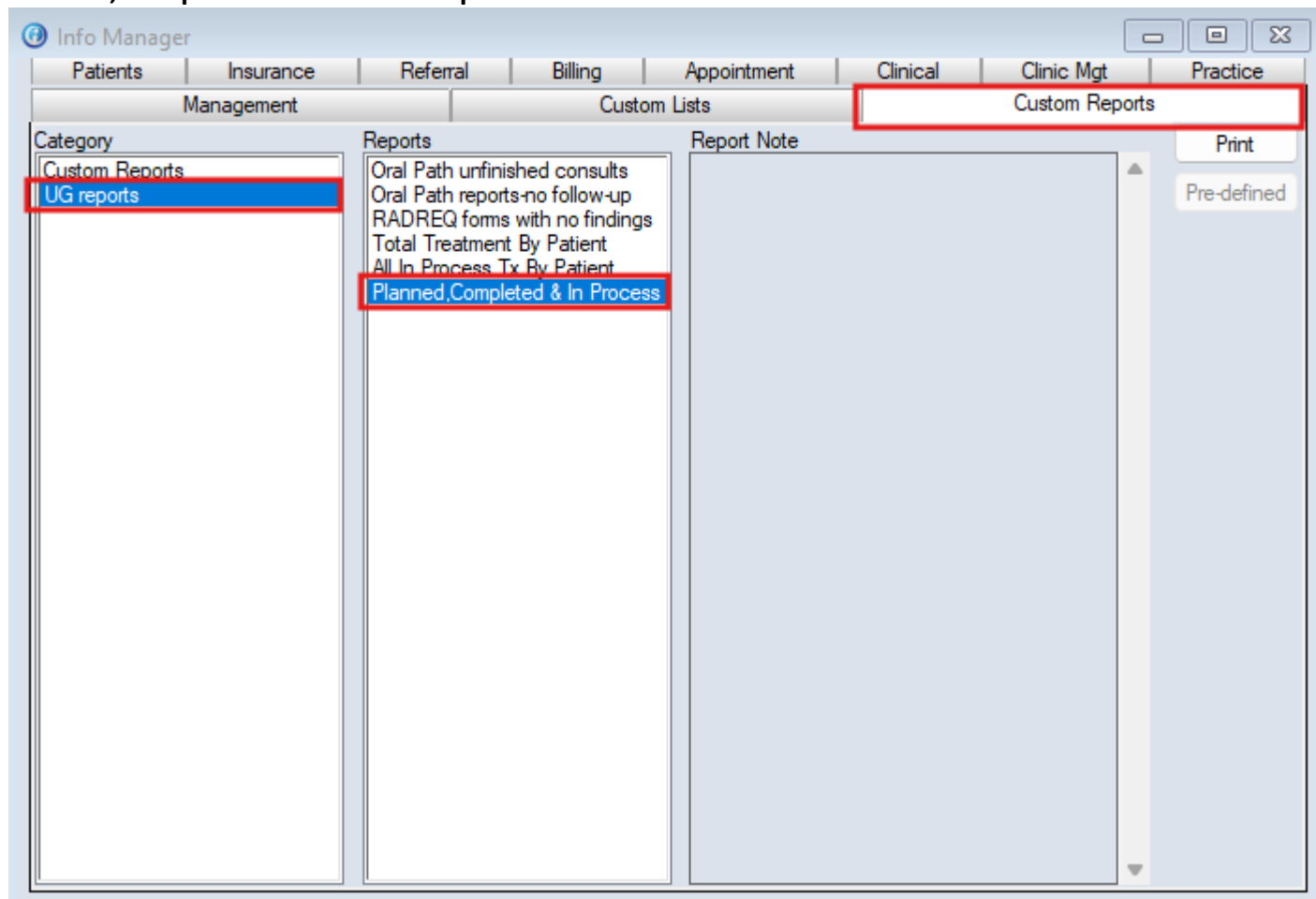
Select Printer

RICOH IM C4510 (Room D126) (redirected 2)
Xerox WorkCentre 7545 (Room D126) (redirected 2)
Xerox WorkCentre 7545 (Room D113) (redirected 2)
Microsoft XPS Document Writer (redirected 2)
OneNote (Desktop) (redirected 2)
Microsoft Print to PDF (redirected 2)

Select Properties... Cancel

- To print report for clearance, Select All, Print, select your printer and select

Planned, Completed & In Process Report



- Select Info Manager
- Select Custom Reports, UG Reports, "Double click" "Planned, Completed & In Process", window will populate with the report

Planned, Completed & In Process Treatment

7/25/2025

TreatmentDate Procedure Description

Site Surface Status Phase Sus Tx Total

Transactions

Click on the tabs on the top of the screen to see the specifics of the following:

- General Tab - overview of transactions and balances
- Treatment - fees and approved planned treatment

Transactions - RADAbdul-Jabbar, Kareem (RAD018)

General | Treatment | Notes

Guarantor: RADAbdul-Jabbar, Kareem (RAD018)
 Emergency: RADAbdul-James, Tns
 Manager:
 Patient Type: Virtual Patient-data only temp

CDGP

Last Visit: 11/07/2025
 Last Recall: 15/05/2025
 Next Recall: 01/08/2025
 Next Appt: Pending
 Last Stmt: 07/07/2023

axiUm

Alert	ALM	5GPERC	PROSP	5PM	4ROHTX
Office	ZONA	5GPERC	PROSP	5PM	4ROHTX
Custom	FRENCH	EMVOTX			
Custom					

Transaction History | Pending | Unapproved

Claim #	Date	Name	Prov.	Code	Site	Description	Patient	Insurance	Total	Prov/User	Stat.	Tx/Chg Practice
c> 109948	19/02/2025	Kareem	DPER2601	11111		Scaling 1 Unit	0.00	0.00	0.00	Dhalla, Suraya	C	Dr. Sam Borden Periodontology...
						Claim Total	0.00	0.00	0.00			
						Running Balance	0.00	0.00	0.00			
c> 1107825	19/02/2025	Kareem	DPER2601	11115		Scaling 5 Unit	0.00	0.00	0.00	Dhalla, Suraya	C	Dr. Sam Borden Periodontology...
						Claim Total	0.00	0.00	0.00			
						Running Balance	0.00	0.00	0.00			
p> 305129	19/02/2025	Kareem		DD		Direct Deposit	-100.00	0.00	-100.00	Duarte-Trozzo, Celia		
p> 305130	19/02/2025	Kareem		V		Visa Payment	-285.73	0.00	-285.73	Janis, Christy		
a> 268824	19/02/2025	Kareem		REV		Payment Reversal	285.73	0.00	285.73	Duarte-Trozzo, Celia		
a> 268825	19/02/2025	Kareem		REV		Payment Reversal	100.00	0.00	100.00	Duarte-Trozzo, Celia		
						Running Balance	0.00	0.00	0.00			
c> 1109878	23/05/2025	Kareem	DR022	51101		Complete Max Denture, ...	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...
c> 1109878	23/05/2025	Kareem	DR022	51101.1		CUD - Tx. Plan	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
c> 1109879	23/05/2025	Kareem	A2503	71101	15	Extraction Single Tooth	0.00	0.00	0.00	Baranjouk, Nestor	C	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
						Running Balance	0.00	0.00	0.00			
c> 1110364	05/06/2025	Kareem	A2618	27201	17	All Ceramic Crown (AC...	0.00	0.00	0.00	Randhawa, Navnoor	C	Dr. G. Niznick College of Dentist...
c> 1110364	05/06/2025	Kareem	DR022	L27201	17	Lab - Porcelain Crown	0.00	0.00	0.00	Reeve - Associate ...	C	Dr. G. Niznick College of Dentist...
c> 1110364	05/06/2025	Kareem	DR022	51101.2		CUD - Final Impression...	0.00	0.00	0.00	Reeve - Associate ...	C	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
c> 1110365	05/06/2025	Kareem	DR022	51101		Complete Max Denture, ...	0.00	0.00	0.00	Reeve - Associate ...	I	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
						Running Balance	0.00	0.00	0.00			
c> 1111206	11/07/2025	Kareem	A9990	23312	45	Perm Premolar Comp/G...	0.00	0.00	0.00	Test, Test	C	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
c> 1111207	11/07/2025	Kareem	A9990	23312	45	Perm Premolar Comp/G...	0.00	0.00	0.00	Test, Test	I	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
c> 1111209	11/07/2025	Kareem	A9999	23323	36	Perm Molar Comp/GI 3S	0.00	0.00	0.00	Student, Test	C	Dr. G. Niznick College of Dentist...
						Claim Total	0.00	0.00	0.00			
						Running Balance	0.00	0.00	0.00			

Personal Planner

Personal Planner

Lists

Provider: A9999 Date From: 26/05/2025

User: Student, Test Date To: 09/06/2025

Unapproved | Assigned Pts | Appointments | Chart Requests | Pt Needs | Overdue Pts | Dispensary | Assigned Forms | Online Requests

Type	Date	Pt Chart	Pt Name	Code	Site	Surf.	Description	Sts	Discipline
------	------	----------	---------	------	------	-------	-------------	-----	------------

Personal Planner

Select Personal Planner icon left of screen to manage patient assignment, patient forms and Needs requests

Personal Planner

Lists

Provider: A9999 Date From: 16/07/2025
User: Student, Test Date To: 30/07/2025

Unapproved Assigned Pts Appointments Chart Requests Pt Needs Overdue Pts Dispensary Assigned Forms Online Requests

Type	Date	Pt Chart	Pt Name	Code	Site	Surf.	Description	Sts	Discipline
Treatment	27/06/2019	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	Bird, Lary				Template Note		
Note	22/08/2022	RAD033	Bird, Lary				Template Note		
Note	22/08/2022	RAD033	Bird, Lary				Template Note		
Note	25/08/2022	RAD033	Bird, Lary				Template Note		
Note	25/08/2022	RAD033	Bird, Lary				Template Note		
Note	29/08/2022	RAD033	Bird, Lary				Template Note		
Note	31/08/2022	RAD033	Bird, Lary				Template Note		
Note	31/08/2022	RAD033	Bird, Lary				Template Note		
Treatment (Del)	22/08/2022	RAD033	Bird, Lary	0100.0			Patient Management	D	
Treatment	25/08/2022	RAD033	Bird, Lary	02112			Two Images	P	Radiology
Treatment	25/08/2022	RAD033	Bird, Lary	01201			Comprehensive Exa...	P	TxPlan
Treatment	25/08/2022	RAD033	Bird, Lary	21223	47	MOD	Perm Molar 3 Surf Am	C	Oper
Treatment	25/08/2022	RAD033	Bird, Lary	1N300.2			Scaling	I	Perio
Treatment	25/08/2022	RAD033	Bird, Lary	1N300.1			Complete Perio Exa...	C	Perio
Treatment	25/08/2022	RAD033	Bird, Lary	1N300			New Perio Patient ...	I	Perio
Treatment	25/08/2022	RAD033	Bird, Lary	0100.0			Patient Management	C	
Treatment	25/08/2022	RAD033	Bird, Lary	33131	16		RCT 3 Canals	I	Endo
Treatment	25/08/2022	RAD033	Bird, Lary	33131.A	16		Diagnosis	C	Endo
Treatment	29/08/2022	RAD033	Bird, Lary	01201			Comprehensive Exa...	P	TxPlan
Treatment	29/08/2022	RAD033	Bird, Lary	02112			Two Images	P	Radiology

Unapproved

→ "Click" Unapproved tab and search

- List of all unapproved items will appear (check this regularly for managing your patients efficiently and in preparation for clearance)

Personal Planner

Lists

Provider: A9999 Date From: 23/07/2025
User: Student, Test Date To: 06/08/2025

Unapproved Assigned Pts Appointments Chart Requests Pt Needs Overdue Pts Dispensary Assigned Forms Online Requests

Pt Chart	Pt Status	Pt Name	Start Date	End Date	Is Primary	Is Restricted	Discipline
T1	I	Exan, Teddy	11/06/2004	31/12/2100	No	No	
RAD030	A	Ralph, RADsampion	20/09/2016	20/09/2028	No	No	
000010	A	Sample, Chart	07/05/2012	31/12/2100	Yes	No	
000013	A	Sample, Planning	17/03/2011	31/12/2100	Yes	No	

Assigned Pts

→ "Click" Assigned Pts tab and search

- List of all patients assigned to you

Personal Planner

Lists

Provider: A9999 Date From: 23/07/2025

User: Student, Test Date To: 06/08/2025

Unapproved Assigned Pts **Appointments** Chart Requests Pt Needs Overdue Pts Dispensary Assigned Forms Online Requests

S	P	Type	Pt Name	Pt Chart	Phone #	Date	Time	Clinic	Reason	Wait
		Active	RADAbdul-Jabbar, Kareem	RAD018	(204) 123-4567	30/07/2025	01:30 PM	Main Clinic	14 MO	
		Pending	Sample, Planning	000013	(204) 555-1515		180 Minutes	Main Clinic		
		Pending	RADioShaq, O'Neal	RAD005			180 Minutes	Main Clinic		

Appointments

→ "Click" Appointments tab and search

- List of all appointments will populate – no appointments with "Active" status for a past dates

Pt Needs

→ "Click" Pt Needs tab and search

- List of all Pt Needs requests will populate

Personal Planner

Lists Summary Summary Test1 Sumrev

Provider: A9999 Date From: 17/07/2026

User: Student, Test Date To: 31/07/2026

Unapproved Assigned Pts Appointments Chart Requests **Pt Needs** Overdue Pts Dispensary Assigned Forms Online Requests

Date	Need	Description	Note	Assigned	Assigned On	Pt Chart	Pt Name

Needs Request Form

User Forms (DH New Pt. Req. Form) - Student, Test

Add Form

Form: DHNP

Date: D2RQ

Description: Student Needs Request Form

Status: DHNP

OK Cancel

Approve +

Date
06/01/2025
06/01/2025

→ "Click" to open a Needs Request Form

- User Forms window will open, "Click" to select your request form based on your current year, "OK"

Needs Request

Form Question	Answer	Date
Student Needs Request:		
Step 1: ANSWER COMPETENCY QUESTION AND THEN PRESS CALCULATE BUTTON		
Is this Needs Request for Competency? (MUST BE ANSWERED!)	Y	24/07/2026
☒ PRESS THE CALCULATE BUTTON TO DISPLAY CURRENT REQUIREMENT STATUS.		
Step 2: ADD VALID NEEDS FROM THE CHECKLIST BELOW		
☒ Please select the Valid Needs from the list and obtain approval		
Step 3: ASSIGN THE FORM TO YOUR PCC FOR APPROVAL. ONCE APPROVED, THE FORM STATUS WILL CHANGE TO "CLOSED" AND THE APPROVED NEEDS WILL BE SEARCHABLE IN YOUR PERSONAL PLANNER		
Step 4: PCC TO REVIEW. ADD COMMENTS AND APPROVE FORM. CHANGE FORM STATUS TO CLOSED.		
PCC Comments		

EPR Question Details - Checklist

Please select the Valid Needs from the list and obtain approval

Options	Info
☐ Comprehensive Treatment Plan	
☒ Implant Treatment Plan	i
☐ 1 Year Implant Recall	
☒ NPP4 or NPP3	i

OK Cancel Add Info

EPR Question Details - Additional Info

NPP4 or NPP3

Additional Information: My NPP4 patient who was assigned just informed me they have been hospitalized and not able to attend

OK Cancel

- Step 1 - You must indicate "Yes" for the 1st question
- Step 2 - "Double click" to show Needs type list for request – please select each of the needs you require at the present time, only submitting 1 request form for multiple needs
- When you select a Need, provide additional information about why you are requesting this Need, "OK"

Needs Request

Form Question	Answer	Date
☒ PRESS THE CALCULATE BUTTON TO DISPLAY CURRENT REQUIREMENT STATUS.		
Step 2: ADD VALID NEEDS FROM THE CHECKLIST BELOW		
☒ Please select the Valid Needs from the list and obtain approval		
☒ Implant Treatment Plan	Y	24/07/2026
☒ NPP4 or NPP3	Y	24/07/2026
Additional Information:	My NPP4 patient who was assigned just informed me they have been hospitalized and not able to attend	24/07/2026
☒ Operative	Y	24/07/2026
Step 3: ASSIGN THE FORM TO YOUR PCC FOR APPROVAL. ONCE APPROVED, THE FORM STATUS WILL CHANGE TO "CLOSED" AND THE APPROVED NEEDS WILL BE SEARCHABLE IN YOUR PERSONAL PLANNER		
Step 4: PCC TO REVIEW. ADD COMMENTS AND APPROVE FORM. CHANGE FORM STATUS TO CLOSED.		
PCC Comments		

Calculate

- You must "Click" the Calculate Button, review the # of your Complete, In process & Planned requirements to confirm if you should submit the request

User Forms (Student Needs Request Form) - Student, Test

D4RQ 539411 24/07/2026 OPEN Last Appr: Tokar (PCC LEAD), Carley Approve + ✓ X ⌚ 🖨️ 🏃 🛒

Needs Request

Form Question	Answer	Date
Step 2: ADD VALID NEEDS FROM THE CHECKLIST BELOW		
Please select the Valid Needs from the list and obtain approval		
☐ Implant Treatment Plan ☐ NPP4 or NPP3 Additional Information:		
☐ Operative		
Step 3: ASSIGN THE FORM TO YOUR PCC FOR APPROVAL. ONCE APPROVED, THE FORM STATUS WILL CHANGE TO "CLOSED" AND THE APPROVED NEEDS WILL BE SEARCHABLE IN YOUR PERSONAL PLANNER		

Add Form Action

Comment

Status: OPEN

Assigned To: OPEN

Message Group: TOPCC Send to PCC

User

OK Cancel

- Step 3 – Action the form to your PCC by updating the Form Status: “Send to PCC”
- If any changes are required, continue using same form and update as needed

Personal Planner

Lists

Provider: A9999 Date From: 26/05/2025 User: Student, Test Date To: 09/06/2025

☒ Include Group Assignments ☐ Include User's Previous Assignments ☒ Show Open Forms Only

Unapproved	Assigned Pts	Appointments	Chart Requests	Pt Needs	Overdue Pts	Dispensary	Assigned Forms	Online Requests
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	371476	31/08/2022	Radiology Request Form	REQ	Student, Test		
RAD033	Bird, Lary	371474	31/08/2022	Axiom Correction Card Form	OPEN	Student, Test		
RAD033	Bird, Lary	371466	31/08/2022	General Referral Form	OPEN	Student, Test		
RAD033	Bird, Lary	371427	30/08/2022	Axiom Correction Card Form	OPEN	Student, Test		
RAD033	Bird, Lary	371426	30/08/2022	O Path Consult Referral&Report	REF	Student, Test		
RAD033	Bird, Lary	371380	30/08/2022	Radiology Request Form	REQ	Student, Test		
RAD033	Bird, Lary	371234	29/08/2022	Radiology Request Form	REQ	Student, Test		
RAD033	Bird, Lary	371149	25/08/2022	Radiology Request Form	REQ	Student, Test		
RAD033	Bird, Lary	371108	25/08/2022	Axiom Correction Card Form		Student, Test		
RAD033	Bird, Lary	371106	25/08/2022	DH Pt. Transfer/Disp. Form		Student, Test		
RAD033	Bird, Lary	370765	22/08/2022	Axiom Correction Card Form	OPEN	Student, Test		
RAD033	Bird, Lary	370720	22/08/2022	DH Pt. Transfer/Disp. Form		Student, Test		
T0008	Branigan, Zapp	77695	13/08/2013	Radiology Request Form	REQ	Student, Test		
T0008	Branigan, Zapp	77694	13/08/2013	Radiology Request Form	REQ	Student, Test		
T0008	Branigan, Zapp	76292	06/06/2013	Radiology Request Form		Student, Test		
	Student,	485201	06/01/2025	DH New Pt. Req. Form	OPEN	Student, Test		
	Student,	462953	21/08/2024	DH New Pt. Req. Form	OPEN	Student, Test		
	Student,	439956	05/01/2024	DH New Pt. Req. Form	OPEN	Student, Test		
	Student,	439678	04/01/2024	DH New Pt. Req. Form	OPEN	Student, Test		
	Student,	418116	23/08/2023	DH New Pt. Req. Form		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		

Assigned Forms: Review forms monthly. Forms still assigned to you and/or forms with a status “open” require your attention, this will aid you in preparation for clearance

- **axiUm Correction Card Form:** Once completed, action to PCC Leads messaging group
- **Radiology Request Form:** Once all findings recorded, update status from REQ (Radiographs requested) to FIN (Finished entering findings) remove yourself from user
- **General Referral Form:** Once completed and approved by instructor, action to Associate Dean
- **O Path Consult Referral & Report:** Once completed and approved by instructor, action to Oral Pathology Staff messaging group

Correction Cards

→ Correction Cards are required to be completed when data entry errors occur

EHR - Chart / Forms - RADAbdul-Jabbar, Kareem (RAD018)

Alerts Problems Objectives

Medical Alerts:

- Allergy to Penicillin
- Atrial Fibrillation
- Bleeding Disorder- see chart
- High Cholesterol
- History of Angina Pectoris
- History of Autism
- History of Rheumatic Heart Disease; Proph AB Req'd; Fo
- History of thyroid dysfunction- see chart
- Organic Heart Murmur (Requires Proph AB/Current AHA
- Paromaker

Tx History Tx Plans **Forms** Attachments/Consents Perio Chart Add

Form #	Date	Assigned To
347956	16/11/2021	A
349284	25/11/2021	A
349288	25/11/2021	A
349550	26/11/2021	A
369864	13/07/2022	A
369883	14/07/2022	A
369884	14/07/2022	A
372747	08/09/2022	A
376166	26/09/2022	A
460450	15/05/2024	A
507313	25/07/2025	A
507314	25/07/2025	A

Add Form

Form: CBCTSG

Date: CBCTSG

Description: CBCT Request Form

Status: CORR

Instructions: Axiom Correction Card Form

Assigned To: ...

Forms on File

- Axiom Correction Card Form
- 21/07/2022
- CBCT Request Form
- 09/08/2019
- Fee Waiver / Adjustment Form
- GP > UG Referral & Initial Rpt
- GP Appointment Record
- GP-Extraoral & Intraoral Exam
- General Referral Form
- Medical History
- O Path Consult Referral/Report
- Patient Screening Assessment
- Radiology Request Form
- TX Plan Form

→ Select Forms

→ Select Create a New Record, "click" on the elipsis and select "Axiom Correction Card Form"

Tx History Tx Plans Forms Attachments/Consents Perio

Change Date: 21/07/2022 OPEN

Last Appr: Approve

Forms on File

- Axiom Correction Card Form
- 21/07/2022
- CBCT Request Form
- 09/08/2019
- Fee Waiver / Adjustment Form
- GP > UG Referral & Initial Rpt
- GP Appointment Record
- GP-Extraoral & Intraoral Exam
- General Referral Form
- Medical History
- O Path Consult Referral/Report
- Patient Screening Assessment
- Radiology Request Form
- TX Plan Form

Form Question Answer Date

Must fill in all the fields that apply to the correction

Student/Staff Name

Provider Number

Date Submitted

Date Error Occurred

Incorrect Data Information

Discipline

Patient Chart Number

Patient Name

Procedure Status

Procedure Code(s) (Including Step Codes)

Tooth Site(s) #

Surfaces Applicable ?

Delete Code(s)

New Procedure Code(s) Information

Procedure Code(s) (Including Step Codes)

Tooth Site(s) #

Surfaces Applicable ?

Sig Required

→ Complete all pink mandatory fields. If not completed the form will be sent back to you for further correction

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date 25/07/2025 OPEN Last Appr. Munoz, Katalina Approve

Correction Form PCC Form

Form Question	Answer	Date
be the same instructor that was present when the error occurred otherwise correction card will be returned.***		
Instructor that was present when error occurred	Reeve,	Trenna
Instructor present approving correction card	Reeve,	Trenna
Click the "Sig. Required" button for the instructor signature.		
Date	25/07/2025	25/07/2025
This form is to be actioned to PCC Leads.		

Sig. Required

Foms on File

- Axiom Correction Card Form
 - 16/11/2021
 - 25/11/2021
 - 25/11/2021
 - 26/11/2021
 - 13/07/2022
 - 14/07/2022
 - 14/07/2022
 - 08/09/2022
 - 26/09/2022
 - 15/05/2024
 - 25/07/2025
 - 25/07/2025
- CBCT Request Form
- Chart Review Pt Trx/Dis
- Consent/WaiverPeriodontal St
- Consultation Form

→ Once all fields have been completed, a signature is required by your original instructor who approved the treatment when the error/change occurred

Tx History Tx Plans Forms Attachments/Conser

Change Date 25/11/2021 CLOSE

Correction Form PCC Form

Form Question

Must fill in all the fields that apply to the corre

Student/Staff Name

Provider Number

Date Submitted

Date Error Occurred

Incorrect Data Information

Discipline

Patient Chart Number

Patient Name

Procedure Status

John Doe

SPT 2

23/11/2021

25/11/2021

Sig. on File

Add Form Action

Comment

Status

Assigned To

Message Group

User

OK

Cancel

COMPLETE

OPEN

CLOSE

PCC

STUD

Completed

Sent to PCC Leads

Returned to Student

Foms on File

- Axiom Correction Card Form
 - 16/11/2021
 - 25/11/2021
 - 25/11/2021
 - 26/11/2021
 - 13/07/2022
 - 14/07/2022
 - 14/07/2022
 - 08/09/2022
 - 26/09/2022
 - 15/05/2024
 - 25/07/2025
 - 25/07/2025
- CBCT Request Form
- Chart Review Pt Trx/Dis
- Consent/WaiverPeriodontal St
- Consultation Form

→ After signature is completed, click action  a window will populate

→ "Click" on the status drop down and select PCC – Sent to PCC Leads which will populate the Message Group "PCC Leads", "click" ok

Add Form Action

Comment

Status

Assigned To

Message Group

User

OK

Cancel

PCC

PCC Leads

- Verify that the Message Group is correct and your name does not appear under the User field (This will result in the form being undelivered)

View 'Received' Message - High Priority

From: Katalina Munoz Sent: 28/07/2025 01:24 PM

To: Test Student;

CC:

Subject: Classic Form Assignment

The following classic form has been assigned to you:
 Form #349284 - CORR
 Axiom Correction Card Form
 Status: STUD
 Chart: RAD018
 Please complete all mandatory fields and re-submit correction card once this is complete.

Reply Reply to All Delete Forward Print

- If you've received an axiUm message indicating a form has been assigned to you please read the comments and address any requested information

Tx History	Tx Plans	Forms	Attachments/Consents	Perio	Chart Add
Form #	Date	Description	Status	User	Assigned To
347956	16/11/2021	Axiom Correction Card Form		Ferreira, Kevin	
349284	25/11/2021	Axiom Correction Card Form	STUD	Rodriguez (PCC LEAD), Tristyn	Student, Test
349288	25/11/2021	Axiom Correction Card Form	CLOSE	Rodriguez (PCC LEAD), Tristyn	
349550	26/11/2021	Axiom Correction Card Form	CLOSE	Ferreira, Kevin	
369864	13/07/2022	Axiom Correction Card Form	CLOSE	Ferreira, Kevin	
369883	14/07/2022	Axiom Correction Card Form	CLOSE	Pammar, Larsen	
369884	14/07/2022	Axiom Correction Card Form	CLOSE	Student, Test	
372747	08/09/2022	Axiom Correction Card Form	CLOSE	Student, Test	
376166	26/09/2022	Axiom Correction Card Form	CLOSE	Dillena, Katherine	
460450	15/05/2024	Axiom Correction Card Form	CLOSE	Ferreira, Kevin	
507313	25/07/2025	Axiom Correction Card Form	OPEN	Munoz, Katalina	Munoz, Katalina
507314	25/07/2025	Axiom Correction Card Form	OPEN	Munoz, Katalina	Munoz, Katalina

Forms on File

- Axiom Correction Card Form
 - 16/11/2021
 - 25/11/2021
 - 25/11/2021
 - 26/11/2021
 - 13/07/2022
 - 14/07/2022
 - 14/07/2022
 - 08/09/2022
 - 26/09/2022
 - 15/05/2024
 - 25/07/2025
 - 25/07/2025
- CBCT Request Form

- Go to the form that has been Assigned to you and edit form

Tx History Tx Plans Forms Attachments/Consents Perio Chart Add

Change Date: 28/07/2025 [STUD] Last Appr: Rodriguez (PCC LEAD) Approve

[!] Correction Form PCC Form

Form Question	Answer	Date
Must fill in all the fields that apply to the correction		
Student/Staff Name	Student	28/07/2025
Provider Number	A2123	25/11/2021
Date Submitted	25/11/2021	25/11/2021
Date Error Occurred	13/10/2021	25/11/2021
Incorrect Data Information		
Discipline	Perio	25/11/2021
Patient Chart Number	12345	25/11/2021
Patient Name	John Doe	25/11/2021
Procedure Status	SPT 2	25/11/2021

Sig. Required

Forms on File

- Axiom Correction Card Form
 - 16/11/2021
 - 25/11/2021
 - 25/11/2021
 - 26/11/2021
 - 13/07/2022
 - 14/07/2022
 - 14/07/2022
 - 08/09/2022
 - 26/09/2022
 - 15/05/2024
 - 25/07/2025
 - 25/07/2025
- CBCT Request Form
- Chart Review Pt Trx/Dis
- Consent/Waiver/Periodontal St
- Consultation Form

- Your edits will change to blue which require another approval and signature
 - After signature is completed, click action  a window will populate
 - "Click" on the status drop down and select PCC – Sent to PCC Leads which will populate the Message Group "PCC Leads", "click" ok
 - If all the information has been completed, the PCC will complete the correction, and the form status will update to CLOSE