



Patient Management Orientation

2026-2027

The University of Manitoba Traditional Territories Acknowledgement

The University of Manitoba campuses are located on original lands
of Anishinaabeg, Ininiwak, Anisininewuk, Dakota Oyate and Dene,
and on the National Homeland of the Red River Métis.

We respect the Treaties that were made on these territories,
we acknowledge the harms and mistakes of the past, and we dedicate ourselves to
move forward in partnership with Indigenous communities
in a spirit of Reconciliation and collaboration.



Patient Care Coordinators

Patient Care Coordinators are here to support you

PCC 4th Year Dental – Elaine Ferrer / 204-789-3450 / elaine.ferrer@umanitoba.ca

PCC 3rd /2nd Year Dental – Athena Monayao / 789-3439 / athena.monayao@umanitoba.ca

PCC Dental Hygiene – Sabrina Raposo / 204-789-3566 / sabrina.raposo@umanitoba.ca

PCC Pediatrics – Gurpreet Virk / 204-789-3393 / gurpreet.virk@umanitoba.ca

PCC Lead (Patient) – Marta Bhopalsingh / marta.bhopalsingh@umanitoba.ca

PCC Lead (Student) – Carley Tokar / carley.tokar@umanitoba.ca

*PCC Emails are not to be shared with patients



Patient Care Coordinators

- PCCs are here to help you manage your patient pool, assign your patients and review requirements
- PCCs review progress daily, ensure you have contacted your patients, and your notes are up to date
- Keep your PCC informed on your patient/requirement progress, delays, or any concerns
- PCCs give you direction & guidance to ensure you follow the protocols & procedures of the College
- PCC Leads are happy to assist when questions arise

For Immediate help: visit one of our offices

For Scheduled help: use the “Book with Me” option via Outlook to reserve an uninterrupted meeting

- Monitor and reply to your emails (outlook & axiUm) in a timely manner
- PCCs working hours are: 8:30 am – 4:30 pm or 9:00 am – 5:00 pm Monday – Thursday (Friday until 4:00pm)

A request made outside of these hours, will be answered in queue the following business day

If you require immediate assistance and your PCC is unavailable, please send your inquiry to

PCCCSS@umanitoba.ca



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Managing Patients

- You will begin the academic year with patients assigned to you
- Make initial phone calls to introduce yourself within 2 weeks of assignment
- Ask if the patient information on file is up to date (ie: insurance, phone#, address)
- Maintain regular communication with patients to manage their dental care

When contacting your patient, you must:

- Use all contact methods listed on the patient card (Home, Cell, Work)
- Document each contact attempt in patient contact notes
- Leave a voicemail with your contact information with a suggested time for callback
- Allow 1 week between each contact attempt
- Try using a University phone (patients may not answer unknown numbers)
- If still unsuccessful after 3 attempts, notify your PCC and review next steps
- If patient refuses/delays/no shows/fails appointments, inform PCC and request a **Patient Disposition** (removing from your patient assignment list)



Managing Patients

- If patient refuses Comprehensive Care (having both dental and dental hygiene care) at COD – remind patient that they must comply with Comprehensive Care Philosophy to remain as a patient with the College or they may be dismissed
- If patient indicates they are unable to attend appointments for an extended time, follow the protocol below:
 - Inform the patient to contact the school when they are ready to return for dental care at 789-3497
 - Depending when they are able to return, they may need to be re-screened
 - If a dental emergency arises, they will need to seek treatment in Private Practice, as we do not have an emergency clinic for patients that are not actively assigned to students
- Inform PCC of patient status and request disposition / review for dismissal



Appointment Management

When contacting patients to book appointments be sure to review the following:

- Offer appointments based on your schedule and manage accordingly
- Length of appointment (3 hours)
- Clinic start times
- Parking information – allow extra time to find parking and how to pay for parking
- Appointment details (treatment, costs and when payment is due)
- Any questions or concerns from the patient



Appointment Management

When scheduling appointments in axiUm:

- Confirm your booking is correct - 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
Rescheduled or Cancelled reminders are not sent to the patient

Appointment type in axiUm must accurately reflect attendance history

Be sure to always update the appointment type accordingly - Attendance is monitored to remain as an active patient at the College

- Prior to appointment, check patient's booking status. If not confirmed, call patient to verify



Appointment Management

When changing appointment type, select the appropriate reason in axiUm:

- **Cancel:**
 - 24HR: Cancelled between 24HR-48HR of appointment time (insufficient notice enter 0100.5 code into EHR)
 - 48HR: Cancelled with 48HR or more from appointment time (sufficient notice)
- **Failed:** If patient cancels with less than 24 hours notice or no shows (enter 0100.V code into EHR) 2 Failed appointments - subject to dismissal from COD
- **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)

Providing more than two days notice is reasonable notice, unless patient is delaying frequently



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Appointment Management

- Update the status by choosing “Check In” on the axiUm schedule upon seating patient in your chair

This is important to track who is in attendance if there is a fire or other need to evacuate the clinic. The appointment status needs to reflect if they are present or not

A reminder attendance is monitored to remain as a patient in the College

- Discuss any treatment details or patient concerns before exiting the operatory to keep conversation confidential
- Ensure all codes have been accurately entered and swiped
- Have patient sign their treatment plan, verbal consent is not sufficient



Appointment Management

- Update the status by choosing “Check Out” on the axiUm schedule upon dismissing your patient from your chair
- Escort your patient to your designated PCC or the next available window to complete your patient’s appointment
- All patients scheduled in Specialty Clinics must be checked out at the Reception window
- Confirm your appointment and billing details with the PCC and inform if a treatment plan should be printed
- Verify PCC has all information necessary from you, before returning to clinic



Appointment Management

Late Booking

If you schedule an appointment into axiUm for the next day (after 3:00 pm) you will need to send an email informing of your late booking.

Address the email to the Floor Lead for your scheduled appointment, Cc' PCCCSS@umanitoba.ca, and specify procedure scheduled



Appointment Management

Emergency Appointment

- Criteria:
 - Pain uncontrolled by OTC medicine
 - Patient cannot sleep due to pain
 - Swelling
 - Bleeding
 - Dental Abscess
- How to manage:
 - Book emergency in your assigned chair (re-schedule patients to accommodate if needed)
 - Arrange for classmate to see patient with approval from mentor or course coordinator if reasonable accommodation cannot be made in your chair
 - Inform PCC that accommodation cannot be made by yourself or classmate and request them to coordinate an appointment in Emergency Clinic for your patient



Appointment Management

Emergency Clinic has limited availability

Book when:

- Emergency criteria has been met
- Assigned student is unable to see patient in a timely manner

Priority Appointments – Not to be scheduled in Emergency Clinic

- Any Crown Re-cementation
- Any Denture Recall / Adjustment



Appointment Management

Screening Clinic

- Assess new or returning patients' dental needs
- Determine if they are a good fit for both the dental and dental hygiene students of the College
- Confirm they are available during school hours, for multiple sessions in the academic year and understand longer treatment timelines
- Inform them of our Comprehensive Care Philosophy
- Explain this is an assessment only, they will return for treatment plan and cost estimate
- If patient requires limited treatment, they will need a referral from their dental home



Appointment Management

Recall Appointments – only for active UG patients

In Screening Clinic

- Patients who are not assigned to a dental student, are seen for annual checkup and charged for a Recall Exam
- Patients managed in Graduate Periodontal Clinic are seen for annual checkup and charged for a Recall Exam

In Dental Hygiene Clinic

- 4th Year Dental Student (D4) on Rotation
- Patients who are in Phase 4 Hygiene Maintenance, are seen for an annual checkup in the hygiene chair. Recall exam is billed. If examination is required prior to the annual Recall date, a Recall Exam No charge can be billed. If dental needs are identified, fill out Interprofessional Note and General Referral Form
- If unable to coordinate with the D4 student, ask your PCC to coordinate a Recall in Screening Clinic and inform your patient they will have to pay for Recall Exam



Appointment Management

Denture Clinic

- 4th Year Dental Students (D4) on Rotation
- Patients scheduled require, denture assessment, adjustment or repair of existing denture
- Dentures fabricated by currently assigned student must be managed in their own chair
- Dentures fabricated outside of COD need to be referred back to original provider
- Coordinate and confirm lab return dates with dental stores, before escorting to reception window
- Schedule next appointments with PCC based on availability and lab return date



Lab Workflow

- You are responsible to inform patients of lab costs associated to treatment when it is planned, prior to booking your patient for the treatment
- Patients are required to make ½ payment to begin all treatment with associated lab costs
- A copy of a Lab Invoice on file is required for all lab work (insurance claims cannot be processed without) Before checking out patient, ensure Lab Invoice has been uploaded to the chart
- For Crowns/Bridges made internally:
 - Pick up gold from Dental Stores
 - After casting, return gold button to Dental Stores to calculate amount used for fabrication
 - Lab Technician will complete an Internal Lab Invoice
 - Dental Stores Staff will upload invoice to patient chart
- For external lab work:
 - Confirm with Dental Stores when case is expected to be returned and schedule appropriately
 - Dental Stores Staff will upload External Lab Invoice to patient chart



Managing Referrals

Coordinating treatment outside of the Undergraduate Clinic

- Communicate the need for referral to your patient
- Inform patient that Undergrad Clinic is still their dental home and are being referred for a specific need outside of our scope. Grad Programs have residents that are already trained dentists, working to specialize in their respective areas
- Explain they will incur a Consultation Fee and there may be a delay in booking an appointment
- Confirm patient is ready for referral to be sent
- If treatment is to be coordinated between Oral Surgery and Undergrad Clinic (Bridge Removal, Immediate Dentures, etc.) please schedule accordingly.
*Immediate Dentures require a 24 - hour Recall
- Write a referral to suitable clinic
- Refer to axiUm orientation for instruction on Referral Forms



Managing Referrals

Undergraduate Oral Surgery Clinic

- Fill out General Referral to Undergrad (UG) Oral Surgery with Instructor, ensuring medical & dental history is complete and indicate if INR or pre-medication is needed
- Consult with Oral Surgeon to determine complexity of the case
- Ensure patient's concerns and questions are fully answered before referring
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Temporomandibular Disorder (TMD)Clinic

- Fill out General Referral to TMD Clinic with Instructor
- Ensure patient's concerns and questions are fully answered before referring and inform of waiting period
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Dental Sleep Medicine (DSM) Clinic

- Fill out General Referral to DSM Clinic with Instructor
- Ensure patient's concerns and questions are fully answered before referring and inform of waiting period
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Oral Pathology (OPATH) Clinic

- Fill out “Oral Path Referral” tab of the with Instructor (updated form)
- Ensure patient’s concerns and questions are fully answered before referring and inform of waiting period
- Ask your PCC to record patient’s PHIN (9-digit MB Health #) in their chart, incase biopsy is needed
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Graduate Oral Surgery Clinic

- Fill out General Referral with Instructor, ensuring medical & dental history is complete and indicate if INR or pre-medication is needed
- Consult with Oral Surgeon to determine complexity of the case
- Ensure patient's concerns and questions are fully answered before referring
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Graduate Periodontal Clinic

- Fill out General Referral with Instructor, ensuring medical & dental history is complete and indicate if INR or pre-medication is needed
- Ensure patient's concerns and questions are fully answered before referring
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly



Managing Referrals

Graduate Prosthodontic Clinic

- Fill out General Referral with Instructor, ensuring medical & dental history is complete and indicate if INR or pre-medication is needed
- Determine with your Team Mentor if this treatment is Limited or Too Complex for UG Clinic, inform PCC of decision
- Ensure patient's concerns and questions are fully answered before referring. If deemed Too Complex, inform patient UG Clinic will no longer be their dental home, they may attend for Hygiene only
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly

*Waitlist may be 1 – 2 years



Managing Referrals

Graduate Orthodontic Clinic

- Fill out General Referral with Instructor, ensuring medical & dental history is complete
- Ensure patient's concerns and questions are fully answered before referring
- Action to designated recipient, as per instruction on the Referral Form
- Patient will not be scheduled until the referral is sent properly

*Waitlist may be 1 – 2 years



Managing Referrals

Pediatric Referrals

- Fill out General Referral with Instructor, ensuring medical & dental history is complete and indicate if INR or pre-medication is needed
- Ensure patient's concerns and questions are fully answered before sending referral
- Every referral in UG Pedo Clinic needs to be actioned to **Pediatric Coordinator**, as per instruction on the Referral Form
- Patient will not be scheduled until referral and all consents are verified



Managing Referrals

General Referral From Dental Hygiene Recall Rotation with D4

- Ensure the Interprofessional Note has been completed
- Complete the Rad Request Form & Findings Report
- Fill out General Referral together – indicating Student Assignment is required and have instructor approve the referral
- Action to PCC Leads as per instruction on the General Referral Form



Medical Consult

- Fill out Medical Consult form (found in filing cabinet outside CSS Office door) with Instructor, ensuring all relevant information is included
- Ensure you have accurate Physician details (name, clinic, contact) from your patient
- Ensure patient's concerns and questions are fully answered and obtain their signature before having consult reviewed to be sent to Physician
- Put completed form in Dr Reeve's mailbox in CSS Office for review
- Once the consult is sent, the chart will be locked
- Patient will not be scheduled for another appointment until their Physician responds in writing. You will be notified when the response is received, and the chart has been unlocked



Requirement Management

4th Year Dental Students

Students must get approval to begin the following requirements:

- Endodontic Treatment
- Immediate Dentures
- Bridges
- Implant Crowns

Once you've fulfilled a requirement, you must get approval to complete an additional of the same requirement of the following categories:

- Cast Partial Dentures
- Implant Support Lower Denture
- Implant Surgical Guide
- Crowns

*If your patient is assigned to a DH student or waitlist, do not proceed with hygiene treatment.
Please discuss with your PCC for verification
If hygiene is required prior to proceeding with dental treatment, communicate directly with co-assigned DH student to coordinate



Requirement Management

3rd Year Dental Students

Students must get approval to begin the following requirements:

- Endodontic Treatment
- Complete Dentures
- Crowns
- Pinned Amalgam Cores
- CPC (Cast/Post & Core)
- Prefabricated Post & Core

*If your patient is assigned to a DH student or waitlist, do not proceed with hygiene treatment.
Please discuss with your PCC for verification
If hygiene is required prior to proceeding with dental treatment, communicate directly with co-assigned DH student to coordinate



Requirement Management

Dental Hygiene Students

- All patients must have a dental examination prior to scheduling an appointment for hygiene
- When necessary, a CTP can be arranged during a D4 hygiene recall rotation, consult with your PCC
- If your patient is in Phase 4 – Hygiene Maintenance - coordinate 1 of their appointments with the D4 Recall Rotation, for their annual check up. If this is not coordinated, your patient will have to attend an additional appointment.
- If you are unable to coordinate the D4 Recall Rotation exam, speak with your PCC to have your patient scheduled for a Recall Exam in Screening Clinic
- If hygiene is required prior to proceeding with dental treatment, communicate directly with co-assigned Dental Student to coordinate



Disposition/Transfer Protocols Dental Students

Disposition

- All assigned patients must be contacted (updated contact notes) prior to requesting more patients
- When requesting new patients, you will need to disposition existing patients from your list
- If disposition is required due to patient management/behavior issue, please inform your PCC and ensure notes/documents are up to date
- If you have not contacted your patients within the sufficient timeframe, they may be removed from your list
- Once you've completed a requirement, any patient you have with the same planned treatment may be reassigned to a classmate who still needs to complete that requirement

***Note-** PCCs will only complete dispositions when their schedule allows.

If you have followed all proper disposition processes, they can still assign you a new patient, even if they have not yet removed the dispositioned patient from your list.

Transfer

- To request a transfer to a classmate, you must request approval from your Course Coordinator/Team Mentor by email with your PCC Cc'd



Disposition / Transfer Protocol for Dental Hygiene Students

Disposition

- All assigned patients must be contacted (updated contact notes) prior to requesting more patients
- When requesting new patients, you will need to disposition existing patients from your list by submitting a Disposition Form in the EHR
- If disposition is required due to patient management/behavior issue, please inform your PCC by axiUm message and ensure notes/documents are up to date
- If you have not contacted your patients within the sufficient timeframe, they may be removed from your list

***Note-** PCCs will only complete dispositions when their schedule allows.

If you have followed all proper disposition processes, they can still assign you a new patient, even if they have not yet removed the dispositioned patient from your list.

Transfer

- To request a transfer to a classmate, you must request approval from your Course Coordinator/Team Mentor by email with your PCC Cc'd to the email



axiUm Correction Cards

If you need to edit/alter/delete a record in axiUm, you will need to fill out a Correction Card in the Forms Tab in EHR

Refer to the axiUm Orientation for instruction page 72 – 74



Personal Planner

The Personal Planner module in axiUm will be used to manage your patient assignments and assigned forms, preparing you for Clearance at the end of each Term

- The following can be viewed:
 - Unapproved Tab - Treatment, Notes and forms
 - Assigned Patients
 - Appointment History
 - Pt Needs Tab - Where you will submit a request to have a new patient assigned based on requirement - refer to axiUm orientation page 71



Fee Waiver Form

- Complete a Fee Waiver in the Forms Tab in EHR and Action to Associate Dean for approval
- Fee waivers are assessed on a case-by-case basis and are not guaranteed
- A fee waiver should not be discussed with a patient, until approved
- Payment will be collected at time of service, even if fee waiver is pending
- If Fee Waiver is approved at a later date, a credit will be applied to patient's account (ie: cost of pulpectomy/pulpotomy will be fee waived once RCT treatment has been completed)



Patient Funds

- To request patient funding, complete the online form through the Patient Fund Form Request Link
- All funding requests are reviewed by Associate Dean (Dental) / Course Coordinator (Dental Hygiene)
- Funds are assessed on a case-by-case basis and are not guaranteed
- Funding should not be discussed with a patient, until approved



Chair Assignments

- Chairs are assigned to each student at the start of the term based on rotation schedules
- If you have trouble finding your assigned chair in Main Clinic, please inquire with the Rotation and Schedule Coordinator (Katalina Munoz)
- Chairs are equitably distributed based on rotations – a request for additional chairs is not permitted
- Manage your patients to work with your schedule
- To request switching units with a classmate to accommodate a patient (ie: patient mobility issue and you want unit closer to main entrance) you must:
 - Discuss with classmate and confirm you both agree
 - Email PCCCSS@umanitoba.ca with your Classmate Cc'd, at minimum the day before your session by 2:30 pm
 - Include the reason for request and which units you would like to switch



Rotation Switches

- Rotation switches for D3 students are prohibited
- Rotation switch requests for D4 students are only considered for special circumstances
- If you have a special circumstance, ie: Writing American Boards Exam, Specialist Appointment, GBR Interview, you must:
 - Discuss with classmate and confirm you both agree
 - Submit a request with advance notice to Trenna.Reeve@umanitoba.ca with Katalina.Munoz@umanitoba.ca and Classmate Cc'd
 - Only straight switches are considered where the # of your Rotations are not affected ie:
 - October 5th – Carley in OS and Marta in GP
 - October 28th – Carley in GP and Marta in OS



Private Dental Insurance

- The College of Dentistry does not accept “Assignment of Benefits” for private insurance
- Patients must pay at the time of service and submit for reimbursement
- Patients are responsible to know their own coverage details
- A pre-authorization can be submitted on the patient’s behalf if they want to confirm their coverage details, ahead of proceeding with treatment
- If your patient requests a pre-authorization, be sure all supporting information, documents (Perio Charting) and x-rays are captured during treatment planning appointment and inform your PCC asap to avoid further delays
- In EHR note, indicate if it is initial placement. If not, indicate when initial was placed/approximately how long ago? 5+ years? etc.



Government Dental Insurance

- The College of Dentistry accepts “Assignment of Benefits” for government funded insurance plans (SA, NIHB, CDCP)
- Confirmation of coverage and eligibility details is required, prior to calling and booking any appointment for patients covered under these insurance plans
- A pre-authorization may be required. Be sure all supporting information, documents (Perio Charting) and x-rays are captured during treatment planning appointment to avoid further delays
- In EHR note, indicate if it is initial placement. If not, indicate when initial was placed/approximately how long ago? 5+ years? etc.
- If treatment is not covered under your patient’s insurance and they wish to pay out of pocket, they must sign an Under Grad Fee Agreement Form, prior to beginning treatment

*Communicate directly with your PCC for all coverage verification before booking.

*As per Clinic Manual, if protocol is not followed you will have to meet with Associate Dean Clinics



SA Insurance

Coverage can change monthly. You must reconfirm each month if they are actively covered

- If they have been seen at COD previously, only a Recall Exam can be billed (every 12 rolling months)
- If they are new to COD a CTP Exam can be billed (if eligible)
- A Panoramic x-ray MUST be pre-authorized
- Total of 6 Images are allowed for a New Patient (if available)
- Total of 2 images are allowed for a Recall Exam (if available)
- Hygiene is allowed 1 time every 12 rolling months
- Fillings have a dollar maximum of \$600 (every 12 rolling months)
- Dentures require pre-authorization
- Implants, Crowns, Bridges and Root Canals are NOT covered (with a minor exception for anterior rct)
- Most Extractions are eligible, some require pre-authorization (Grad OS)
- Sedation is NOT covered



NIHB Insurance

Coverage remains for lifetime. If the patient has a Private Insurance and NIHB, the College of Dentistry cannot accept “Assignment of Benefits” as the Private Insurance will be 1st payor

- If they have been seen at COD previously, only a Recall Exam can be billed (every 12 rolling months)
- If they are new to COD a CTP Exam can be billed
- Panoramic x-ray limited to 1 per 60 Months, up to 3 in a lifetime (not in conjunction with 10+ images)
- Total of 10 images are eligible (every 12 rolling months)
- Hygiene is limited (every 12 rolling months)
- Fillings are eligible 1 time, per tooth (every 24 rolling months)
- Dentures and Crowns are eligible (subject to frequency eligibility and some require pre-authorization)
- Root Canals are eligible (subject to frequency limit and some require pre-authorization)
- Bridges and Implants are not covered
- Most Extractions are eligible, some require pre-authorization
- Sedation requires pre-authorization



CDCP Insurance

Coverage can change and patients must re-apply yearly, in June (frequency dates do not re-set)

- If they have been seen at COD previously, only a Recall Exam can be billed (every 12 rolling months)
- If they are new to COD a CTP Exam can be billed if frequency limit allows
- Panoramic x-ray limited to 1 per 60 Months, up to 3 in a lifetime
- Total of 8 images are eligible (every 12 rolling months)
- Hygiene is limited (every 12 rolling months)
- Fillings are eligible 1 time, per tooth (every 24 rolling months)
- Dentures, Post & Core, Comp Core and Crowns are eligible (subject to frequency eligibility pre-authorization)
- Root Canals are eligible (subject to frequency limit and some require pre-authorization)
- Bridges and Implants are not covered
- Most Extractions are eligible, some require pre-authorization
- Sedation requires pre-authorization

