Scheduling in Chair Mode for Students

Two conditions must be satisfied to schedule an appointment:
1. Provider time available - although the system is designed to follow providers schedules, you are ultimately responsible for double-checking your schedule.
2. Chair available - the system will indicate whether or not a chair is available and the discipline for whom the chair is reserved. You are responsible for honoring the clinic policies and practices for chair use.

Scheduling a Recurring Appointment

Reserving a Chair

1. Click on the Scheduler button in axiUm's opening screen. Scheduler should open to chair mode and should default to the clinic you will be using, today’s date, AM session.

- To change the clinic: either click on the book icon or right-mouse click in the Chair window and choose Select Clinic. Double-click on the desired clinic.
- To change from the morning to afternoon session: click on or near 12:00p on the bottom left of the Chair window.
- To change from afternoon to morning: click on or near 1:00p, top left of the window.
2. Advance to the date on which you wish to make an appointment. You can do this by:
   - Clicking on today's date showing in green on the status bar to bring up the calendar.
   - Clicking on the + or -

If no chairs are showing, either the clinic is closed for that session or scheduling templates are not available.

3. To reserve a chair for the entire three to four hour clinic period, single click on an open chair (a white block) reserved for the discipline associated with the type of patient treatments you are scheduling. For example, if you are scheduling amalgams, choose a chair reserved for Restorative. The block will turn green and your name will appear on the block. To unreserve the chair, just click again. Hovering over the block shows the chair number and the amount of time you have the chair reserved.

4. If you need less than the entire clinic time for appointments, right-mouse click in the white box and choose Reserve Partial Session for. Use the arrow keys to select From and To times. OK.

Only reserve a chair for the amount of time you need to complete your appointments.

Scheduling a Patient in the Chair

1. Click on the Active tab to schedule the appointment. Your reserved time will appear in beige (not grey). If no chair is reserved, all time slots will be grey.

2. Click in the desired time slot on the calendar, bringing up the Appointment Rolodex. If your patient's name appears in the notepad, double click to select it. Otherwise, type in the first few letters of the last name in the name field and press Enter to bring up their record.

3. Double clicking on patient's name brings up a New Appointment window with the patient's name, address, phone #, chair # and appointment time already set.
   - Tx Discipline: choose appropriate discipline.

4. If Recall, click on Recalls button.
Ordering Instruments

1. Click on Tx Plan button to open Appointment Treatments window that lists all planned, inprocess, and unscheduled treatments. Select the ones you will complete at this appointment (use shift or ctrl key to select multiple treatments). Either double-click or click on the right facing arrow to move the items to the Appointed Treatments side of the screen. Close.

2. Click Accept on the New Appointment window. For dental students, the appointment will be set in place (in white) in the time slot you clicked on. For hygiene students, the appointment will be floating around (in yellow) for you to place. Move your appointment to the correct time and double-click to set. Your appointment is now in place and your instruments request has been sent to the Dispensary.

Scheduling Nonplanned Treatments

The scheduling process is identical to above up to the point of clicking on the TX Plan button from within the New Appointment window. When you bring up the Appointment Treatments screen, it may either have no planned treatments or the treatment you need to schedule is not listed.

1. Click on Planned Procedure button at the bottom of the window, opening the Procedure Codes List.

2. Click on the + beside D0100 to expand. Double-click on D0150 to select. The window will close and that treatment’s code will appear in the Planned Procedure field.

3. Click on the right-facing arrow to move the procedure into the Appointed Treatments window, triggering a dispensary request. Close window.
Selecting a Recall and Adding a Note

If this is a recall appointment, click on the *Recalls* button in the *New Appointment* window and select the appropriate recall from the bottom of the *Patient Recalls* window. The recall data will automatically appear in the *New Appointment* window.

Make a brief note in the *Reason/Note* window so that staff can quickly see the reason for the appointment if the patient calls.

Rescheduling An Appointment

From within *Scheduler, Active* tab, appointments listed:

1. Right mouse click on the appointment and choose *Reschedule*. The appointment will become a floating entity. You can change the date and it will stay right with you waiting for you to reposition it.

2. Once moved to the desired, available time slot (must be beige, not grey), doubleclick and it’s anchored again.

Confirming, Cancelling, Failing, Deleting an Appointment

From within *Scheduler, Active* tab, appointments listed:

1. When a patient confirms the appointment, right mouse click and choose *Confirm*. The appointment text in the *Active* tab turns blue.

2. When a patient calls to cancel an appointment, right click on the appointment and choose *Cancel*. Choose from one of the options to indicate the conditions for the cancellation.
3. When a patient fails to show up for an appointment, right click and choose Failed. You will be asked if you wish to reschedule the patient at that time.

4. To delete a patient schedule, right click, choose Delete.

**Viewing Patient Appointments**

From within Scheduler:
- Click on the Rolodex in the upper right corner of the window.
- Find and double click on the patient's name, bringing up the Family Appointment History. (Also in Patient Card window.)

**Viewing Your Own Appointments**

- Click on Personal Planner - Appointments tab.
- The Provider number should be your own.
- Enter the date range.
- Click the search button.

**Setting up a Recall Appointment (Followups after Treatment Completion)**

On completion of a procedure that requires a recall, the system will prompt you to enter a patient recall record, or automatically enter the recall on behalf of the provider. You can also manually enter a patient recall record by any of the following methods:
- Right click on a patient name in the Rolodex and select Patient Recall.
- Right click on a patient appointment in the scheduler window and select “Patient Recalls”

With any of those methods, the Patient Recalls window will open:

**Show Deleted:** If checked, will cause the list to refresh and display deleted lines as well as active lines.

**Recall Code:** Indicates the length of time between the current date and the date a patient is due to return to the clinic for a visit.

**Recall Type:** Indicates the type of recall that is being booked / entered. ie: Surgical recall or Hygiene recall.

**Status:** Choose Active.

**Provider:** Indicates the provider that is expected to check the patient.

**Clinic:** Indicates the clinic that the recall should be scheduled in.

**Comment:** Free text field to enter comments about the recall. If canceling a recall, for reporting purposes this field could contain the cancellation reason.

**Recall Date:** Date the patient is expected to return for the recall. This field will be defaulted by the system to the expected date when a new entry is made.

**Appt Date:** Date of the actual recall appointment. This field will be filled in automatically by axiUm when the recall is associated to the appointment. No entry is required here.

**Minutes:** The number of minutes required for the recall appointment.

Completing this process adds the recall to the EHR Tx History and allows you to click on the Lists button from the scheduler to generate reports that will prompt you to make the appointment in whatever time frame you designate.
Color Coding

The clinics sessions will appear in the “Active” tab in different colors as described below:

- Gray is an unavailable time slot (i.e., the clinic is closed)
- Bronze is a clinic holiday or provider holiday
- Pale yellow is an available time slot

In “Chair Mode” the chairs will appear in different colors as described below:

- White if the chair is not reserved
- Yellow if the chair is reserved for another person without an appointment made yet
- Red if the chair is reserved for another person with a student entered appointment
- Blue if the chair is reserved for another person with a staff entered appointment
- Green if the chair is reserved for the student currently logged in

Navigation

The user can move through time by left clicking on either the:

- Right of the “- 1 Day +” button to move forward one day;
- Left of the “- 1 Day +” button to move back one day;
- Right of the “- 1 Week +” button to move forward one week;
- Left of the “- 1 Week +” button to move back one week;
- Right of the “- 1 Month +” button to move forward one month;
- Left of the “- 1 Month +” button to move back one month;
- Date button below this button (with a date displayed in green) to move to a specific week/date