Introduction

This document covers the process of an instructor approving entries that students have entered in the system if approval is required for the item entered. Examples are: In process or completed treatments, notes, forms, and treatment plans.

User Authentication Window

Approvals occur in several places throughout the software. In each case, the user will be presented with a User Authentication window. With this window you can authorize in any one of three different methods.

1) Type your user ID and password, and then click ‘OK’.
2) Insert your Smart Card into the smart card reader and enter your pin number when prompted.
3) Swipe your swipe card through the swipe card reader.

Conditions

Please see the section titled ‘Patient Approvals’ below.

Patient Approvals

There are two ways to open the Patient Approvals window from within the EHR.

1) The Patient chart number in the task bar displays in aqua when there is unapproved treatment on the patient record. Left click on the chart number field to open the approval window.
2) In the EHR window for the desired patient on the In Progress, Tx history or Chart Add Tab, swipe your card through the magnetic swipe card reader.

The Patient Approval window will appear.

View the conditions, pre-existing treatments, ortho visits and treatments entered by the provider in the middle list to ensure they have entered the correct information for the selected patient. This is very important. If this is incorrect, click on the “Close” button and have the student correct the treatments.

Check that the information is correct in the upper fields on the window. Verify that the correct Practice, Facility (if this is a medical procedure), and Fee guide which will control the dollar amounts charged are entered. If the claim is a medical claim verify that the Medical Claim check box is checked. If the school is using the ‘Optional Grading’ feature check the box Enter Evaluation if you wish to grade the student at this time.

If the treatments to approve are not all selected, hold the “Ctrl” key down and then left click on the treatment lines to multi-select items for approval. Once all treatments to be approved have been selected with the left mouse button, release the “Ctrl” key.

With the treatments in the middle list selected to be approved, swipe the approval card through the workstation’s swipe card reader (if the clinic does not use swipe cards then the instructor should press the “Approve/Add Default” or “Approve/Add Special” button at this time). This will open the User Authentication window. Follow the directions for the User Authentication window.
provided above. Once this is done, the treatments will be moved from the middle list to the lower list.

If the provider requires approval of notes, the note window will open for the faculty to review the note information. If the note is accurate and acceptable, follow the approval method above to approve the note (swipe, type or insert card).

If the treatment requires special adjustment of the fees, or adjustment of the patient / insurance split for the fees, the instructor should press the “Approve/Add Special” button and adjust the fees accordingly.

If treatments were completed, and the student’s Id is set to ‘sessional’ grading then the “Student Evaluation” window will appear at this time. The instructions for this process can be found in the “Grading_(Instr).pdf” file.

If there are unapproved EPR Forms, this will be displayed in blue text on the bottom of the approval window.

Left click on the blue text to open the EPR record for review and approval. EPR tabs that contain responses requiring approval will be displayed in blue text, as will the responses themselves. To approve within the EPR, after reading all responses to be approved either swipe the approval card through the swipe card reader or click on the Approve button to open the Form Approval window. Select either ‘Current Page’ or ‘All Pages’.

You can then swipe your card again to complete the approval if using swipe cards; or click approve to open the User Authentication window where you can insert your smart card for authentication or manually type your user Id and password to authenticate.

<table>
<thead>
<tr>
<th>Medical History</th>
<th>Dental History</th>
<th>Clinical Exam</th>
<th>Consultations</th>
<th>Pediatrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Question</td>
<td>Answer</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you under a physician’s care at present?</td>
<td>N</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you ever been a hospital patient or undergone any surgery?</td>
<td>Y</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If yes, indicate year and reason for hospitalization</td>
<td>March 2002 - Gallbladder removal</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drugs taken on a regular basis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If yes, please name these drugs, their dosage, and frequency</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you ever taken corticosteroid or steroid medication?</td>
<td>N</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If yes, when did you take it?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you have any allergies? Please check all that apply</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you ever had a peculiar reaction to medication?</td>
<td>N</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anaphylactic, meditated, or injection?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you have or have you ever had chest trouble or a stroke?</td>
<td>N</td>
<td>02/10/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Big Required</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Evaluations Manager

Right click on an item in the Unapproved Tx tab, and select “Patient Approvals...”. The Patient Approvals window will appear. Follow the approval process outlined in Patient Approvals above.

“Automatic Approval” is used to stamp records that were imported from the axiUm remote system as ‘approved’. The axiUm approval will be completed without you having the ability to make alterations or review the data.

### Lab orders

The approval button is on the lower left of the screen. Click on the button to electronically approve the order. This will open the User
Authentication window. Once the approval is completed, the ‘approval required’ indicator will disappear and the order displays ‘in-progress’.

**Ortho visits**

Please see the section titled ‘Patient Approvals’.

**Patient ASA Score**

When the patient ASA score requires approval, the User Authentication window will open as soon as the student clicks on the ASA button to move the score to the right.

**Perio Charts**

After the Perio chart has been entered by the student, they will click on either ‘Complete’ or ‘Incomplete’ to close the Perio window. If ‘approval on entry’ are required the User Authentication window will open. If approvals are not required at the time of entry the approval will as described in “Patient Approvals” above.

**Personal Planner**

Right click on an item in the Unapproved tab in the Personal Planner, and select “Patient Approvals” The Patient Approvals window will appear. Follow the procedure in Patient Approvals above.

**Prescriptions**

On ‘Ok’ the User Authentication window will open. Once the approval is obtained, the prescription will be printed (if it was not phoned in), the prescription window will close and the newly written prescription will be displayed in the list of prescriptions for the patient.
The student that wrote the prescription will be listed as the Provider, and the attending faculty that approved the prescription will be listed as the Doctor. The faculty name will be printed on the prescription and they will have to write in their DEA number and sign the form.

Problems

Problems that require approval will display in blue text in the lower list.

Highlight the item line in the lower list, review the entry made by looking at the fields for site, area found, problem type and status; when ready to approve click ‘approve’.

This will open the User Authentication window. Once the approval is obtained, the text will display in black text.

Pre-Existing Treatments

Please see the section titled ‘Patient Approvals’.

Rolodex

Right click on the selected patient in the active list in the Rolodex window and select “Patient Approvals”. The Patient Approvals window will appear. Please see the section titled ‘Patient Approvals’.

Taskbar

The taskbar displays the patient chart number in AQUA when there are unapproved items on the patient record. Left click on the patient chart number in the taskbar; the Patient Approvals window will appear. Please see the section titled ‘Patient Approvals’.

AxiUm Auto Approve Mode

The Treatment Billing Information dialog is available for users not requiring approval for adding treatments. When a user does not require approval, AxiUm is placed into “auto approve” mode.

When the user is adding treatments in the Chart Add tab and the Edit Billing Information checkbox located in the Chart Add dialog is checked, the Treatment Billing Information dialog will appear when the treatment is added, no approval dialog is displayed and the billing information can be edited.
When the user is editing a treatment in the Tx History tab dialog, there is the same checkbox in the Change to In Process Treatments and Complete Treatments Dialogs.

The **Edit Billing Information** checkbox has to be selected before the OK button is pressed. When it is the **Treatment Billing Information** dialog pops up. Here the user can look at or change the billing information for the treatment and pressing OK approves the treatment without having to swipe. If the user uses the new Close button to exit out of this dialog the treatment will be added but will be unapproved.

For more information regarding the treatment approval process please see the section: [Patient Approvals](#).

**Treatment Plans**

When approval is required in the Treatment Planning module, treatments will display in blue text in the list, and the approval button on the window will be enabled. In the **General Plan Tab** clicking on the approval button opens the approval window where the user can swipe their approval card to complete the approval process.

In the Detailed Plan Tab clicking on the approvals button opens the Approve Treatment Plan window. If a consultant was required for this plan the specialty of the required consultant will be listed below the ‘instructor’ line.
When the specialist line is selected, only the treatments of their specialty are displayed in the lower list.

The specialist will click on “approve” to open the User Authentication window, or will swipe their card to approve without opening the authentication window first.

Once all consultant approvals have been obtained, the instructor will highlight the instructor line and follow the same process.

Now has the ability to enter information for another provider, allowing users (e.g. hygienists) to make clinical entries (e.g. treatments) on behalf of any provider (e.g. dentists). These entries are stamped with the other provider’s name and can be set up to require approval regardless of whether the logon user normally requires approval for the specific record. Entries not associated to a provider (e.g. notes) will be stamped with the logged-in user’s name.