Welcome to the University of Tennessee Health Science Center
College of Dentistry

AxiUm Training: Staff, Scheduling (D3/D5) and Chart Locks

- The AxiUm Staff Scheduling Team
- Scheduling Form
- Patient Portfolio Help
- Record Locks

axiUm is the complete clinic management system to over 27 dental institutions in North America and Europe.
D3 and D5 Scenario

D3 and D4 students (a.k.a. D5 students) will submit a written request and have their patients scheduled by staff schedulers.

D3 Students will begin the semester working in pairs, assisting one another with their assigned visits.

AxiUm Staff Scheduling Team (located at Dunn 4th Floor Lobby)

Sherry Maley  
Jacqueline Chapman  
Tanya Brown  
Myra McGarrity – Randolph
Please **print** the information on your Scheduling Forms as clearly as possible. Also include as much detail as possible so the scheduler knows exactly what to schedule for you.

You are still ultimately responsible for managing your portfolio of patients and getting the completed procedures required for graduation.

Use the **Staff Schedulers** as a resource to enhance your doctor-patient relationship. Keep the lines of communication open with your patient.

**SCHEDULING FORM**

Patient Name________________________

Patient Phone_______________________

Record # ________________

Department ________________

Procedure_________________________ Site__________

(Please be Specific) (Tooth/Quad/Arch)

Approximate time of next appt. wanted ________________________

(example: 1 week, 1 month)

Student Doctor Signature_________________________
Ardell Relliford and Debra Perry in the Clinical Affairs Office will assist you by updating patient assignments within the AxiUm program. Your Coordinator will also help you with your Portfolio.

You must present a Patient Assignment form that is signed by a faculty member, to add and/or remove a patient from your portfolio.

Patient’s must be in your portfolio before the schedulers can schedule an appointment for you (D3’s). D4 students schedule their own appointments.
Patient Portfolio Help: 2nd Floor (G) Front Desk Staff

Linda Brown, Shiretha Dabney and Susie Robinson located at the 2nd floor (G) Front Desk, will make a patient record when you are bringing in a new patient (who has not been seen for a special screening).

They will also assist you in keeping your patient’s address, telephone numbers and any DISCOUNTS they may be eligible for up-to-date.

Records in the old Oracle system, but not in the AxiUm system, can be entered here. (The front desk staff will create a new chart and send an email to the AxiUm administrators to change the chart number to match the old Oracle system and the paper chart.)
Melisa Banks, Gloria Crews will assist you in managing your portfolio by mailing contact cards to your patients and setting the patient status to WILL CALL or INACTIVE.

These functions can also be performed by the Mod Coordinators.
Record Locks

Record locks are designed to Stop scheduling and treatment until the conditions that warrant the lock are resolved. Unpaid balances, Unsigned Notices of Privacy, Insurance Authorization, Promissory Notes, Returned Checks and Will Call are some of the most frequent reasons for locks. If you are on campus, locks may be resolved or temporarily suspended by contacting designated staff. If you log in to AxiUm from off campus you will not be able to schedule a patient with a locked record.

A message box similar to the one below will be the first thing you will see if the chart is locked.
Record Locks: 1 Col – Account Sent to Collections

The **1COL – Account Sent To Collections** hold can only be removed by the **College of Dentistry Business Office** located on the 1st floor of the Dunn Building across from the lab. Please see **Evelyn Conley** to remove this hold.

[Image of Evelyn Conley]

**Electronic Chart Lock Warning - Test, Test25 (S048195)**

The patient’s record is locked because of the following conditions:

1COL – Account Sent To Collections

No treatment can be completed for this patient until the above conditions(s) are resolved. Do you wish to continue?

[Image of chart lock warning]

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The NPP – Notice of Privacy Practice record lock can only be removed by having the patient sign an electronic copy of the University of Tennessee’s Notice of Privacy Practices document.

The patient’s signature is required by federal law – HIPAA - Health Insurance Portability and Accountability Act of 1996.

The personnel at the 2nd Floor (G) Front Desk will collect your patient’s signature for you.

Linda Brown  
Susie Robinson  
Shirietha Dabney
The 2 NAMI-Natn’t Alliance Mentally Ill lock is an insurance hold. Patient insurance coverage must be verified.

Linda Ramat in the Clinical Affairs Office is the primary person who can remove this hold for you.

Remember
Off Campus: A locked chart CANNOT be scheduled.
On Campus: A staff member must remove the lock for you.
The PROM – Prom Note Signed ER Clinic record lock indicates that a patient did not pay fully for an emergency visit. Any unpaid balance must be paid before further treatment can be provided.

**Linda Ramat** is the primary person who can remove this lock for you.

**Beckey Hawes, Dale Jackson, Bronte Christian, and Diane Weber** in the Clinical Affairs Office, can remove this lock for you if **Linda Ramat** is not available.
The 2 DORAL-Doral record lock indicates that a patient has TENNCARE insurance. Coverage. This insurance must be verified each time the patient visits, prior to receiving services. This lock will reset after a period of time.

Linda Ramat in the Clinical Affairs Office is the primary person who can remove this hold for you.

Beckey Hawes and Ramona Ivy in the Clinical Affairs Office can remove this hold for you if Linda Ramat is unavailable.
Record Locks: BALOD – A/R>90 days -

The BALOD – A/R> 90 days -- > Business Office record hold indicates that the patient has an overdue balance. Dale Jackson, Diane Weber, Bronte Christian, Linda Ramat or Beckey Hawes in the Clinical Affairs Offices will assist you with these locks.

Note: If you need to make sure a patient is NOT billed for REDO work, you must enter a note in the EHR and have it swiped by a FACULTY member. Then send Diane Weber or Dale Jackson a AxiUm messenger e-mail with the patient chart number and what procedure needs to be at NO CHARGE.
The 1RTC – Returned Check record lock indicates that a patient’s check has been returned unpaid.

Evelyn Conley in the Business Office – 1st floor – will assist you in the removal of this lock.

Electronic Chart Lock Warning - Test, Test25 (5048195)

The patient’s record is locked because of the following conditions:

Patient has office code 1RTC – Returned check

No treatment can be completed for this patient until the above conditions(s) are resolved.
Do you wish to continue?

No

Remember
Off Campus: A locked chart CANNOT be scheduled.
On Campus: A staff member must remove the lock for you.
The WCM – Will Call Pending Med Consult lock indicates that a request has been sent but not returned for a medical consult.

Sherrill Cole in the Oral Diagnosis Dept. and MOD Coordinators will assist you in removing this lock.
<table>
<thead>
<tr>
<th>Money Issues</th>
<th>Overdue Balance Locks</th>
<th>Ms. Bronte Christian, Ms. Beckey Hawes, Mr. Dale Jackson, Ms. Diane Weber, Ms. Linda Ramat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Insurance Locks</td>
<td>Ms. Linda Ramat, Ms. Beckey Hawes, Ms. Ramona Ivy</td>
</tr>
<tr>
<td></td>
<td>Pricing and/or Rebilling Issues</td>
<td>Mr. Dale Jackson, Ms. Linda Ramat, Ms. Diane Weber</td>
</tr>
<tr>
<td></td>
<td>Promissory Notes:</td>
<td>Ms. Bronte Christian, Ms. Beckey Hawes, Ms. Linda Ramat</td>
</tr>
<tr>
<td></td>
<td>(Patient does not have enough funds to pay for Emergency dental work)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collections Holds</td>
<td>Ms. Evelyn Conley</td>
</tr>
<tr>
<td>Patient Port Issues</td>
<td>Adding and Deleting Patients from D3 and D4 student ports</td>
<td>Group Coordinators, Ms. Debra Perry, Ms. Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Adding Department Permissions from D3 and D4 student ports</td>
<td>Group Coordinators, Ms. Debra Perry, Ms. Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Will-calls, inactivates and case completes.</td>
<td>Group Coordinators, Ms. Gloria Crews, Ms. Melissa Banks</td>
</tr>
<tr>
<td>Medical Consult Locks</td>
<td>Will Call Pending Medical Consult</td>
<td>Ms. Sherrill Cole</td>
</tr>
<tr>
<td>Reports</td>
<td>New Requests and to report problems with existing reports.</td>
<td>Mr. Frank Pancratz</td>
</tr>
<tr>
<td>Oracle Record Not In AxiUm</td>
<td>Have Front Desk create NEW record with Chart ID beginning with and “S” (Send Mr. Frank Pancratz and e-mail to set the correct Chart ID).</td>
<td>See Front Desk to create the “S” record.</td>
</tr>
</tbody>
</table>
Dr. Lloyd George, Michael Barbieri, Diane Weber, Frank Pancretz and Dale Jackson serve as the AxiUm Administrators (super users). We understand most of the software features and are dedicated to teaching you how to use this software and supporting the mission of the University of Tennessee College of Dentistry. We are ready, **willing and able** to be of assistance to you… Please use the administrative staff whenever possible to “share” the workload. Please be patient and understand that there will be times when one or more of us are unavailable. We can generally cover for one another, except in the areas where we specialize. If you need additional one-on-one training come see us. Good Luck!