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

AxiUm Training: Staff, Scheduling (D3/D4) 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 D4 Scenario

D3 and D4 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)

Melissa Banks  
Jacqueline Chapman  
Tanya Brown  
Leah Spearmon
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.

<table>
<thead>
<tr>
<th>SCHEDULING FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Name__________________</td>
</tr>
<tr>
<td>Patient Phone__________________</td>
</tr>
<tr>
<td>Record # ____________________</td>
</tr>
<tr>
<td>Department ____________________</td>
</tr>
<tr>
<td>Procedure__________________ Site__________________ (Please be Specific) (Tooth/Quad/Arch)</td>
</tr>
<tr>
<td>Approximate time of next appt. wanted ____________________ (example: 1 week, 1 month)</td>
</tr>
<tr>
<td>Student Doctor Signature__________________</td>
</tr>
</tbody>
</table>
AxiUm Training: Portfolio, Scheduling (D3/D5) and Chart Locks

Patient Portfolio Help: Clinical Affairs Office Staff

Ardell Relliford and Debra Perry at the Front Desk 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 and D4’s).

MOD Coordinators
Shiretha Dabney and Kayla Echols 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.)
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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. **Chart locks may be resolved or temporarily suspended by contacting designated staff.**

A message box similar to the one below will be the first thing you will see if the chart is locked.

![Electronic Chart Lock Warning](image)
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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 **2nd floor of the Dunn Building**. Please see **Evelyn Conley** to remove this hold.

Evelyn Conley
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.

Kayla Echols

Shirietha Dabney
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Record Locks: 2NAMI – Natn’t Alliance Mentally Ill

The 2 NAMI-Natn’t Alliance Mentally Ill lock is an insurance hold. Patient insurance coverage must be verified.

**Aisha Davis** in the Clinical Affairs Office is the primary person who can remove this hold for you.

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**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.

Aisha Davis is the primary person who can remove this lock for you.

Beckey Hawes, and Dale Jackson in the Clinical Affairs Office, can remove this lock for you if Aisha Davis is not available.

Aisha Davis

Beckey Hawes
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.

**Aisha Davis** in the **Clinical Affairs Office** is the primary person who can remove this hold for you.

**Becky Hawes** and **Ramona Ivy** in the **Clinical Affairs Office** can remove this hold for you if **Aisha Davis** is unavailable.

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**Record Locks: 2Doral – Doral**

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

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

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Aisha Davis  Beckey Hawes  Ramona Ivy
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 an AxiUm messenger e-mail with the patient chart number and what procedure needs to be at NO CHARGE.
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Record Locks: 1RTC – Returned Check

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.

Remember
**Off Campus:** A locked chart CANNOT be scheduled.
**On Campus:** A staff member must remove the lock for you.

Evelyn Conley
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Record Locks: WCM – Will Call Pending Med Consult

The WCM – Will Call Pending Med Consult lock indicates that a request has been sent but not returned for a medical consult.

Sherrill Stanton in the Oral Diagnosis Dept. and MOD Coordinators will assist you in removing this lock.

Sherrill Stanton
MOD Coordinators
<table>
<thead>
<tr>
<th>Money Issues</th>
<th>Overdue Balance Locks</th>
<th>Beckey Hawes, Dale Jackson, Anna Montgomery, Aisha Davis</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Insurance Locks</td>
<td>Aisha Davis, Beckey Hawes,</td>
</tr>
<tr>
<td></td>
<td>Pricing and/or Rebilling Issues</td>
<td>Carriann Bingham</td>
</tr>
<tr>
<td></td>
<td>Promissory Notes:</td>
<td>Beckey Hawes, Linda Ramat, Carriann Bingham</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>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, Debra Perry, Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Adding Department Permissions from D3 and D4 student ports</td>
<td>Group Coordinators, Debra Perry, Ardell Relliford</td>
</tr>
<tr>
<td></td>
<td>Will-calls, inactivates and case completes.</td>
<td>Group Coordinators, Melissa Banks, Jacqueline Chapman, Tanya Brown, Leah Spearmon</td>
</tr>
<tr>
<td>Medical Consult Locks</td>
<td>Will Call Pending Medical Consult</td>
<td>Sherrill Stanton</td>
</tr>
<tr>
<td>Reports</td>
<td>New Requests and to report problems with existing reports.</td>
<td>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>
AxiUm Administrators

Dr. Lloyd George, Michael Barbieri, Anna Montgomery, Frank Pancratz 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!