

axiUm Training

University of Kentucky
College of Dentistry

Patient Registration Module

Patient Registration – Version 2.3



Welcome

- Why AxiUm? (from Overview)
- Trainers: JoAnn Lowery, Lori Bruelheide, Glenna Jarboe, Rebecca Napier, and Susan Lundin)
- Training includes registering patients, updating addresses, locating patients in system plus “AxiUm Extras”
- Class Time: 1.5 hours (There will not be a break)
- All slides are duplicated in notebook with notes.
- Since there is so much information, please do not log on to system until instructed to do so. You will be given samples to complete at the end of our training demonstration.

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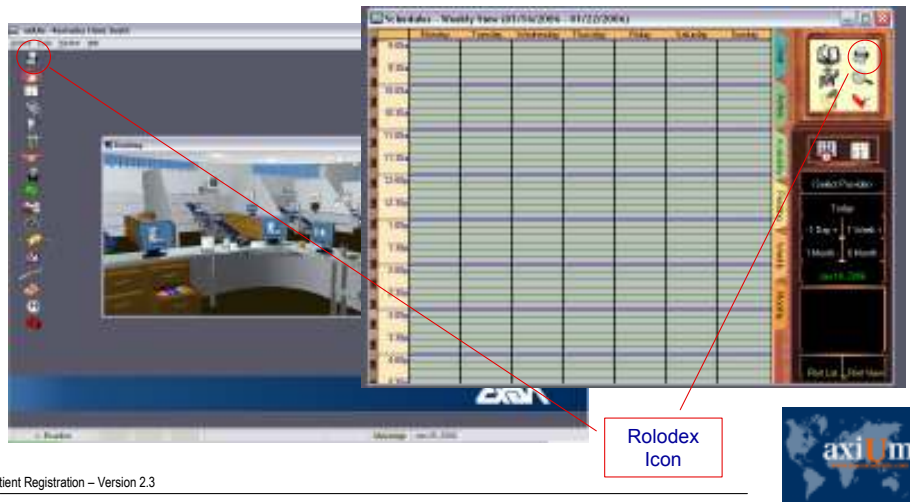


Why AxiUm:

- Path to electronic patient record
- Used in 24 other U.S. dental schools
- Provides greater educational exposure for students and residents
- State-of-the-art Technology for staff , faculty students/residents recruiting
- Increased efficiency
- Improved reporting
- More user-friendly
- EHR will permit view of all patient encounters across clinics

Patient Registration

- Choose **Rolodex** icon from the Desktop or Scheduler Book view

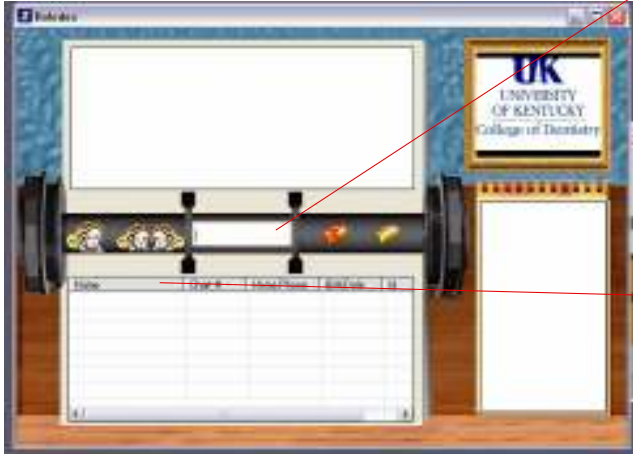


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The Rolodex may be accessed from either the Desktop or the Scheduler Book

Patient Registration

□ Search for an Existing Patient Record



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From the main Rolodex screen, search for an existing patient record.

To start a search, type Lookup Info in the **Search Block**. Searches may be by patient name, Chart #, Social Security Number or birth-date.

Name – Search in this order: Patient last name, first name (no space between last and first name); Patient maiden name, first name (no space between last and first name).

To search using both names, type 3-4 characters of the patient last name, a comma, then at least one character of the first name (no spaces)

After entering name, click the grey “Name” box on the bottom part of the screen. You may also hit the enter key rather than clicking the grey box.

Chart # - Enter chart number and click the grey “Chart #” box or hit the enter key.

Social Security # - Enter SSN without dashes and click the grey “ID” box or hit the enter key.

Date of Birth – Enter patient date of birth in MM/DD/YY format (including slashes) and click the grey “BirthDate” box or hit the enter key.

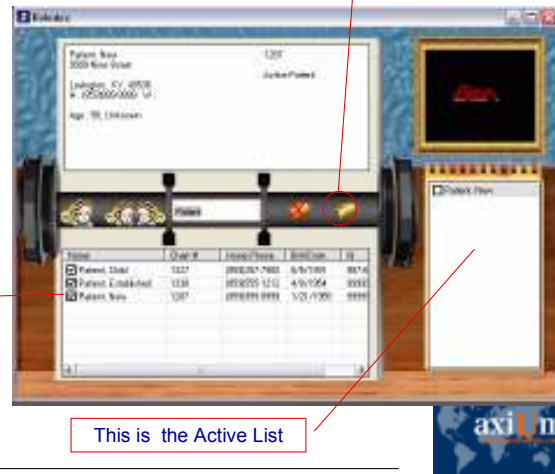
Patient Registration

□ Access the **Patient Card**

Note: Patient must be selected to the Active List before proceeding

Double-clicking the name will move the patient to the Active List

This is the Patient Card button



This is the Active List

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If patient exists, select the patient by double-clicking patient name to **Active List**

- Access the **Patient Card** to confirm existing data (preferred name, date of birth, phone number, address, responsible party, insurance information)
- To access the **Patient Card**, select the patient by clicking on the name in the **Active List** then click the **Patient Card** icon
- If the patient's name should always appear in the Active List, check the box to the left of the patient name by highlighting the patient name in the Active List and Right-Clicking. Choose "Hold Patient in List." This will retain that patient's name in the Active List even if the List is cleared. You may right click on the patient name in the Active list and choose deselect patient if you are thru with this patient.

Patient Registration

Confirm the Existing Data

The screenshot shows the 'Patient Card' window in the axiUm software. The window title is 'Patient Card' and it contains a 'Patient, New' form. The form is divided into several sections: 'Patient, New' (top left), 'Insurance 1' and 'Insurance 2' (middle left), and a main data entry area (right). The 'Patient, New' section includes fields for Name, Address, City, State, Zip, Home #, Work #, Office #, Contact Home, and Email. The 'Insurance 1' section includes fields for Insurance 1, Insurance 2, and Patient's Name. The main data entry area includes fields for Date of Birth, Sex, Race, Ethnicity, Religion, and a 'Binder Clip' icon. The 'Binder Clip' icon is highlighted with a red circle and a callout box that says 'Check the attachments'. The 'Patient, New' section is highlighted with a red box and a callout box that says 'Confirm this data with the patient'. The 'Insurance 1' section is highlighted with a red box and a callout box that says 'Be sure to review the information in all of the tabs'. The 'Save' button is highlighted with a red box and a callout box that says 'Save before closing this screen'. The axiUm logo is visible in the bottom right corner of the window.

Confirm this data with the patient

Check the attachments

Be sure to review the information in all of the tabs

Save before closing this screen

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- d. If changes need to be made to patient information, click anywhere on the *yellow* part of the **Patient Card** to access the screen that allows changes; make necessary changes and **Save**
- e. Also be sure to check any existing attachments for the patient by clicking the **“Binder Clip”** icon. Update attachments as necessary.

Patient Registration

□ Check the Birth-date

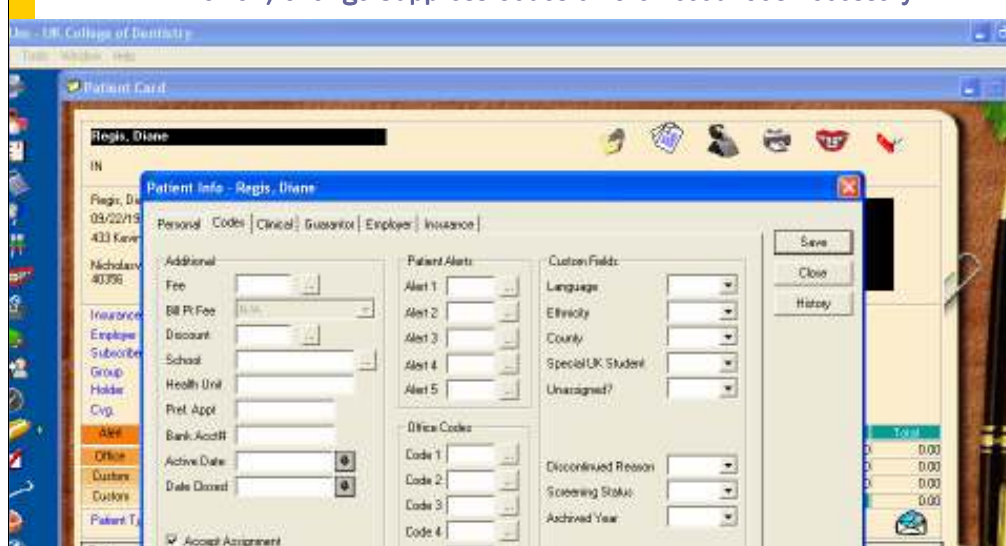
The screenshot shows the 'Patient Info - Patient: Dentistry' window. The 'Personal' tab is active. The 'Birth' field is highlighted in red, showing '01/01/1900'. A red callout box points to this field with the text: 'If the birth-date is 01/01/1900, obtain a corrected birth-date from the patient'. Other fields include Name (Last: Patient, First: Dentistry, Middle:), Personal Sex (Male), ID (987654321), Marital (Unknown), Status (SCREEN), End Date, Home Address (123 Smile Court, Lexington, KY 40502, Fayette County), Telephone (Home: 659-257-7900), and Assignment (Providers, Managers, Faculty).

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- d. If changes need to be made to patient information, click anywhere on the *yellow* part of the **Patient Card** to access the screen that allows changes; make necessary changes and **Save**
- e. Also be sure to check any existing attachments for the patient by clicking the **"Binder Clip"** icon. Update attachments as necessary.

Patient Registration

- Review/Change Suppress Codes on the Account as necessary



Clicking on the **codes tab** will open a window to allow suppression or un-suppression of statements. If the send statements tab is checked, statements will be sent.

The status of the account (e.g. Collection, No Charge) may also be viewed by clicking the **codes tab**.

Patient Registration

□ Adding a **New Record**

If record cannot be located, create a New Patient



If the patient does not exist in the database, add patient by clicking the **“Add New”** icon.

Patient Registration

Personal Tab

Enter minimum of Last, First, Phone & SSN

Notice only three tabs are available until the record is saved

Be sure to Save this screen before closing

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- Enter basic demographic information into the **Personal Tab** of the **Patient Card** (minimum requirements are Patient Last Name, First Name, Phone Number, Responsible Party, Address, and SSN). Unless you are scheduling a screening patient for appointment, change status to active. You will get a message asking if you wish to auto-assign a new chart #. Click yes.
- Switch to the **Codes Tab** and enter any applicable **Office Codes**, **Alert Codes** or **Special Codes** for the patient.
A list of available codes for each section can be displayed by clicking the **“More”** button. Select an code from the available list by double-clicking.
- Add the patient’s Emergency Contact information on the **Clinical Tab**.
- Enter the patient’s Primary Medical Doctor, if available.
- Save this Screen by clicking the **“Save”** button before closing.

Patient Registration

☐ Responsible Party Tab

Enter **Guarantor** Demographics

This is the Light Bulb icon. It clears the screen

This box should be checked if the Responsible Party has an Insurance Policy

This box should be checked for the second adult Responsible Party

Click Create New Form, then Choose a Form

This is the Add button. Use it to save a record

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Name	Relation	Address	City	Telephone	P. Holder	Primary
Patient, Resp/pt	Self	5659 Nine Street	Lexington	853,569-3333	No	Yes
Patient, New	Self	5659 Nine Street	Lexington	853,569-3333	Yes	No

- f. All patients are automatically entered as “Self” in the **Responsible Tab**. If the patient is a child or has another Responsible Party, add that information.
- Click the **Light Bulb** icon to clear the patient’s information from the screen of everything except last name and address.
 - Enter the Responsible Party information. If the Responsible Party is a **Policy Holder** or **Secondary Guarantor** make sure that the correct boxes are checked.
 - Save the information by clicking on the “**Add**” button instead of the “**Save**” button.
- g. Add the patient’s or Responsible Party’s Employer to the **Employer Tab**, if known. A list of common employers can be accessed by using the “**More**” button.
- Once the Employer is chosen, add this to the patient’s record by clicking the “**Add**” button instead of the “**Save**” button.
 - Employers not already in the list may be added manually by clicking the “**Create New**” button.
 - Any known information about the Employer may be typed into this screen. Click “**OK**” to save this record. This will add the Employer to the list which can then be used to populate the **Employer Tab**.

Patient Registration

Insurance Tab

Enter Plan Information from Patient's Insurance Card

If the patient has Insurance, the Subscriber field must be completed.

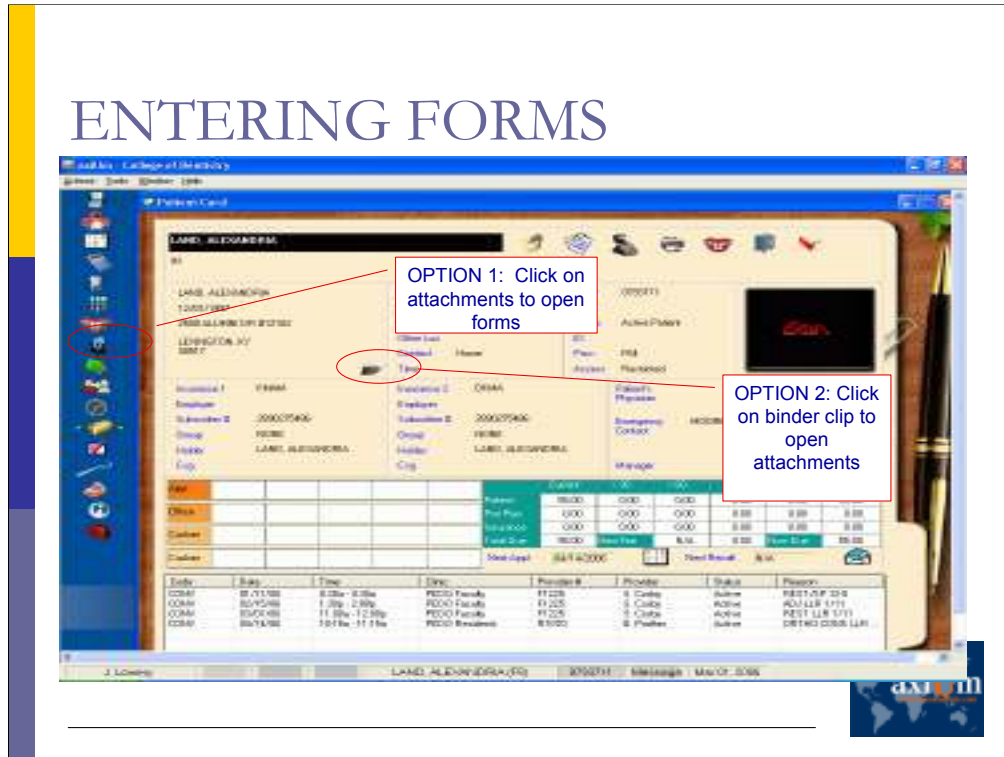
Use this button to view available insurance plans

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- h. To add an Insurer, choose the **“More”** button to access a Search window. In the Search window type a portion of the Insurer’s name and click the Name field on the Detail Block.
- Choose the correct Insurer based on the Claims Submission address on the patient’s ID card.
 - If the desired Insurer does not exist, please call the Insurance Office at 257-1494 or 323-8098 for addition of that payor.
 - Enter the patient’s Subscriber ID (Policy #), Group Number and Effective Date for the Insurance Plan. The Subscriber # field will automatically populate with the SSN entered on the first screen. This may not be accurate if the patient is not the Policy Holder. Please verify this information from the patient or the Insurance Card. Many insurance companies no longer use the social security number as the subscriber number. Always check for the correct subscriber number on the insurance card.
 - Once the Insurance is chosen and the ID#s verified, add this to the patient’s record by clicking the **“Add”** button instead of the **“Save”** button.

ENTERING FORMS



You may enter the HIPAA form, waiver form, etc. thru the attachments (binder clip). You would click on the patient card and then the binder clip. You could also choose the attachment clip icon on the desktop.

Once a form is entered, you can not delete it. However, you can remove the information on the form.

Patient Registration

□ HIPAA Form

Complete form and hit “Enter” to Save

Form Question	Answer	Date
HIPAA CONSENT FORM		
Date Privacy Notice Given		
Restrictions 1?		
Description:		
Restrictions 2?		
Description:		
Insurance waiver form signed by patient		
Private Pay notice signed by patient		
Insurance waiver form signed by patient		
Private pay notice signed by patient		
Insurance waiver form signed by patient		
Private pay notice signed by patient		

Click on text
to display
answer boxes

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Choose the HIPAA Form from the drop-down menu. Click on the field to display an answer box for each item.

- Enter the current date as the date the form was provided to the patient.
- Choose “Yes” or “No” for Restrictions
 - For any “Yes” answers type a description under the Description field
- Enter the date for any Insurance Waivers and/or Private Pay Waivers signed by the patient.
- When the form is complete hit “Enter.” The form will not save properly if “Enter” is not pressed.
- The research form needs to be entered when registering a patient. When the form is complete, hit the enter key.

Patient Registration

□ Purge Information

Existing Forms are Viewed by Clicking the Name of the Form

The screenshot shows a software interface with a menu bar at the top containing 'In Progress', 'Tx History', 'Tx Plan', 'Forms', 'Attachments', 'Pelo', 'Labo', 'Prescriptions', and 'Chart Add'. Below the menu bar, there is a 'Change Date' field with the value '01/18/2006' and an 'Approve' button. A 'Forms on File' dropdown menu is open, showing 'HRA Consent' and 'Purge Information'. The 'Purge Information' table has the following structure:

Form Question	Answer	Date
PURGE DATE		
CODE		
DATE REREGISTERED		
PURGE DATE		
CODE		

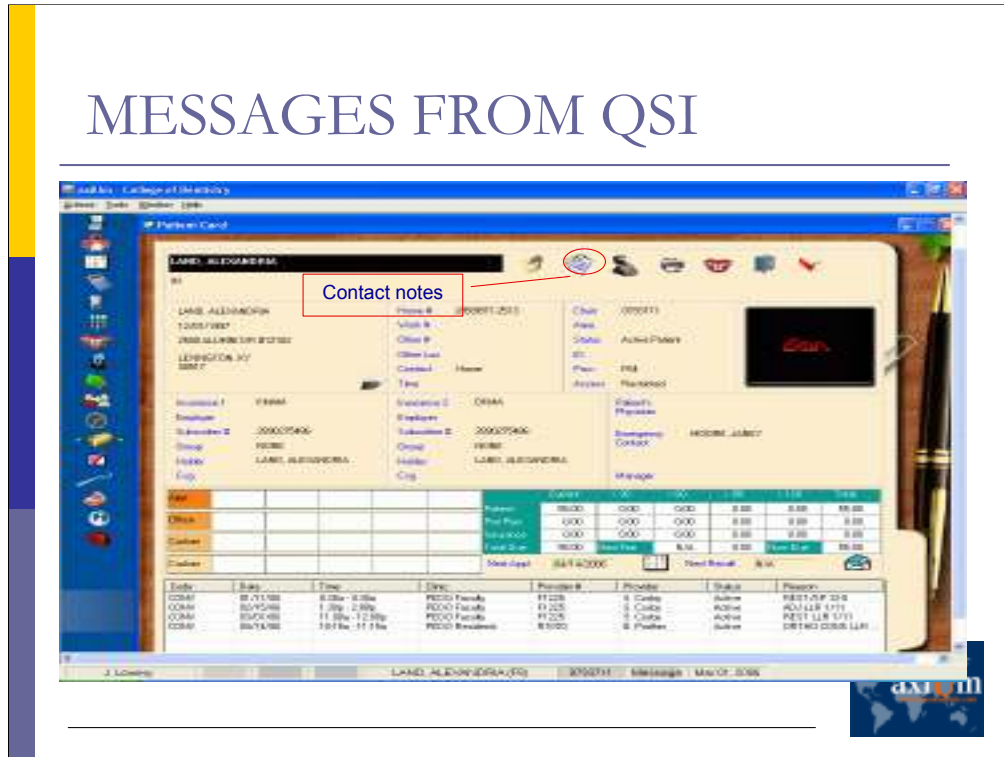
If the patient has a Purge record, that information is available in Forms

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If a chart is purged, enter the date you are reregistering the patient. Some accounts have multiple purge forms. The reregistration information needs to be entered on each.

MESSAGES FROM QSI



After choosing your patient from the rolodex, click the patient folder. You will then need to click on the contact notes. This will open the notes that converted from QSI. Only notes from accounts with balances were converted.


MESSAGES CONTINUED

Patient Contact Notes ✖

Show Deleted

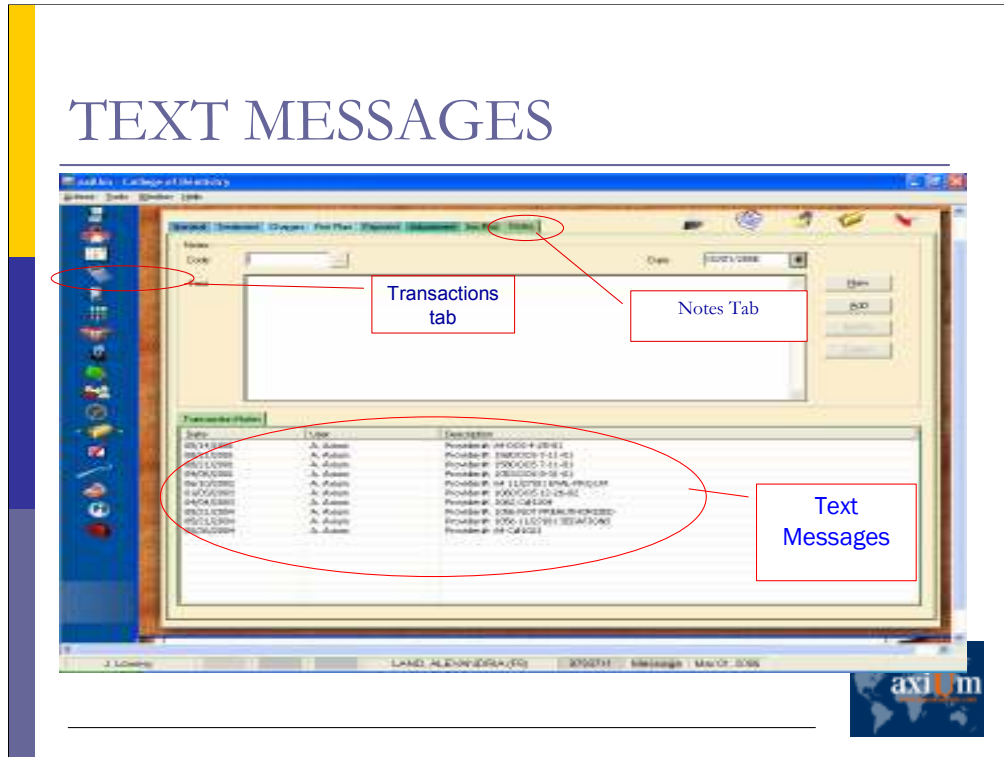
Contact Note
 Date: 03/01/2006 Time: 09:12 AM User: Lowery, JoAnn
 Note:
 [Empty text area]

Date	Time	Note	User
11/01/2001	12:00 AM	1.SENT PREAUTH TO HRC FOR 2 INDIRECT PULP ...	A. Axiom
11/01/2001	12:00 AM	2.3 COMP/RESIN CROWNS.COPY IN C/F.DC ...	A. Axiom
01/16/2002	12:00 AM	3."PREAUTH WAS RETURNED FOR XRAY'S.NARR...	A. Axiom
01/16/2002	12:00 AM	4.FORM.SENT TO CONNIE.DC	A. Axiom
01/23/2002	12:00 AM	6.AUTH BOOK.DC	A. Axiom
01/23/2002	12:00 AM	5.REMAILED PREAUTH W/NARRATIVE & XRAY'S.C...	A. Axiom
02/14/2002	12:00 AM	7.CIP FOR DOS 11/27/01 AS RA 12/03/01.CT ...	A. Axiom
02/28/2002	12:00 AM	8.RCVD PREAUTH FOR 2 PULP CAPPINGS.UPDAT...	A. Axiom
02/28/2002	12:00 AM	9.SENT COPY TO CONNIE.COPY IN PREAUTH BOO...	A. Axiom
03/19/2002	12:00 AM	10.RCVD DENIAL FOR 2 RESIN CROWNS.DENIED ...	A. Axiom



Messages were converted by clinic. You will see all of clinic 1, then proceed to clinic 2 and so forth. Keep in mind you may see notes from one clinic but not another. This was totally dependent on balance owed.

TEXT MESSAGES



Text messages such as dates, etc. that were in QSI were converted under the transactions icon and the notes tab. Collection information is also located in the text messages.

Refund requests (paperless)

The screenshot shows the AxiUm software interface for a patient named LAND, ALEXANDER M. The interface includes a top navigation bar, a patient card with various fields (Name, Address, Insurance, etc.), and a table for charges. Two callout boxes provide instructions: 'OPTION 1: Click on attachments to open forms' pointing to a binder clip icon, and 'Option 2: Click on attachments to open forms' pointing to a dropdown menu.

Requests for refunds are now entered in AxiUm. Enter your search for patient on the rolodex. Move the patient to the active list. Then click on the binder clip to open the forms. Use the drop down box to choose refund. Complete the information as requested. Form will be saved by hitting the enter key.

Thank You

- Use the handouts in the Notebook as reminders. CDs of this information are available upon request.
- Contact your supervisor or a member of the Implementation Team, if you need help.

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