

# FacultyAccess Basic Operation



## Overview

FacultyAccess is a web-based application for use on Apple iPads that enables faculty to manage the daily operation of a provider clinic. FacultyAccess is optimized for sessional providers, but can also be used for periodic providers.

You can display provider appointments and treatments, approve and grade student procedures, and send and receive messages while touring the classroom clinic. Depending on your dental institution's clinic workflow, you can use the Appointments tab or the Providers tab to manage most of the tasks in a clinic classroom. To view the benefits of using either tab, see *Appointments tab and Providers tab comparison*.

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# Appointments Tab

## About the Appointments tab

Use the Appointments tab to display appointment lists for today. An appointment list displays various levels of detail:

1. The appointment list displays a summary view of the number of unapproved treatment items for the appointment as well as associated notes.
2. Drilling down on an appointment displays a summary of appointment treatments (if any).
3. Drilling down on treatment items provides further clinical details.

From the appointment lists, you can start check appointments, approve provider appointments/treatments, add appointments to a Watched list, and perform evaluations. For information on performing evaluations, see *Enter evaluations*.

In addition, you can filter or sort chair notification states.

To view a workflow using the appointment pages, see *Scenario for using Appointment pages*.

### My Appts

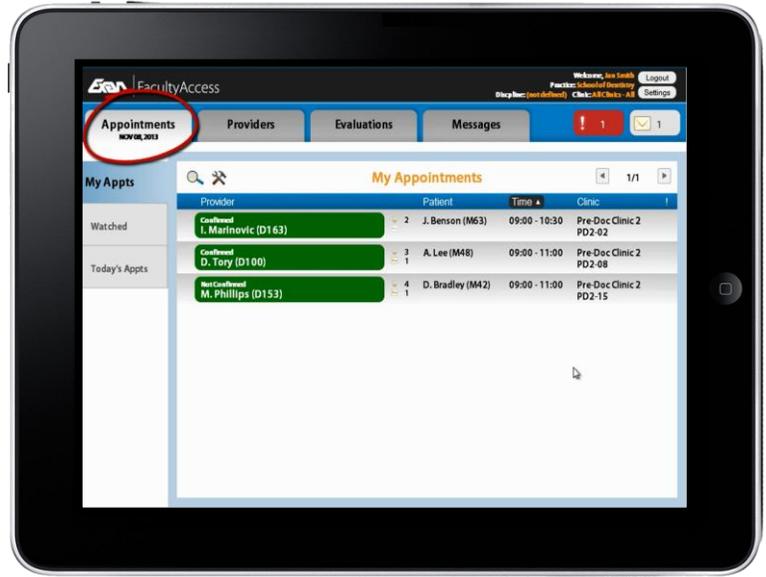
The My Appointments page lists appointments that you are supervising, for example, appointments that you have start checked. For more information, see *Start check appointments*.

### Watched

Watched appointments are appointments that you add to the Watched Appointments list to supervise closely. Also, if your dental institution doesn't use start checks, you can use the Watched list to place all the appointments that you're supervising. See *Watch appointments*.

### Today's Appts

The Today's Appointments page lists all appointments for the day with summarized information, and may display both start-checked and non-start-checked appointments. By default, the appointments are ordered by start time.



## Scenario for using Appointment pages

It's the beginning of a clinic session in the PreDocs clinic for faculty member John Smith. He taps the Today's Appointments tab to view his list of appointments for the morning PreDoc clinic 2. At a glance, he can see appointments, some with a number of treatments and unapproved notes (see *Display appointment details*). John decides to display clinical notification indicators for his appointments, so that he can respond quickly to requests for start checks, approvals, etc (see *Filter appointments by chair notification states*).

For the moment, his appointment list is showing appointments with a red background and appointments with a gray background. Appointments with a red background require a start check while appointments with a gray background have been start checked by another faculty member. He start-checks an appointment showing a clinical notification state requesting a start check (see *Start check appointments*). With the appointment start checked, he removes the clinical notification indicator (see *Clear a single clinical notification indicator*). Start-checked appointments are added to the My Appointments list, and now display with a green background, indicating that they've been start-checked. The My Appointment list is a useful repository for the appointment providers he's supervising (see *Display your appointments*).

Soon enough, the Today's Appointments list is displaying appointments with green, gray, and red backgrounds. It'll be easier to show only appointments that require a start check until all appointments have been start checked (see *Hide appointments not requiring a start check*). John will move between the Today's Appointments list and the My Appointments list, until all appointments have been start checked.

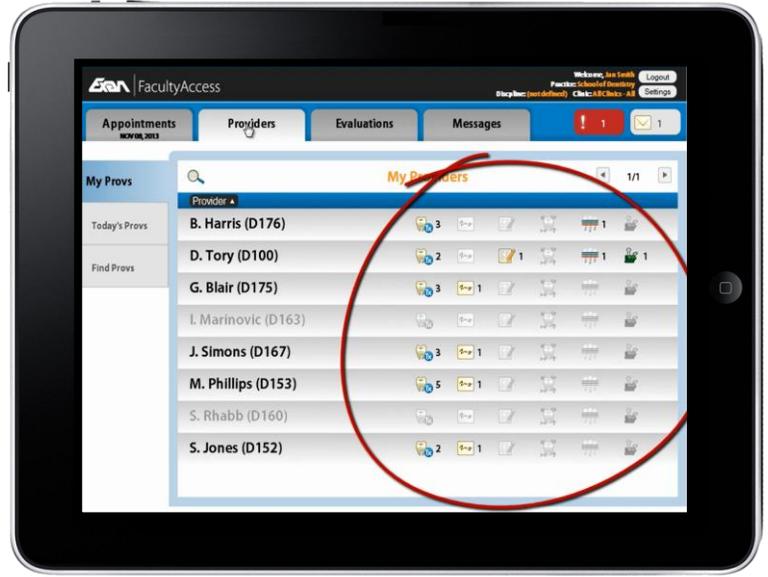
Back to the My Appointments page where John is busy approving appointment treatments (see *Approve appointment treatments*). One appointment is added to the Watched list because the appointment provider will need close supervision for one of his treatments (see *Watch appointments*). While approving an appointment treatment, he edits an unapproved note (see *Edit an unapproved treatment note*) and because the provider has completed the treatment, he performs an evaluation (see *Enter evaluations*).

# Providers Tab

## About the Providers tab

Use the Providers tab if you want to approve and evaluate by provider lists. A provider list displays various levels of detail:

1. The provider list displays a summary view of the today's providers with the number of unapproved treatment items (treatments, associated notes, forms, findings, perio charts, and letter attachments) that require approval and evaluation.
2. Drilling down on a provider displays a summary of provider treatments (if any).
3. Drilling down on treatment items provides further clinical details.



You can approve providers and provider treatments in addition to evaluating providers and their treatments.

If your dental institution uses start checks, use the Appointments tab.

To view a workflow using the Provider pages, see *Scenario for using the Provider pages*.

### My Provs

The My Providers page lists the providers that you're supervising today in addition to any provider treatment items that require approval, for example, providers that you've start checked. If a provider has multiple appointments, the provider will only display once in the list.

### Today's Provs

The Today's Providers page lists all providers for the day with summarized information such as the name of a provider and a number of provider treatment items that require approval. Unapproved provider treatments from previous days will also show in the list.

### Find Provs

This list contains a list of all providers, graded sessionally and periodically. Use to search for a providers for example, a provider who receives combined mode grading. See *Search providers*.

## Scenario for using the Provider pages

Faculty member John Smith wants to view only providers he's start checked today (see *Display providers you've start checked*). While he's viewing the list, a provider requests approval for an unapproved perio chart. He performs a search on the provider (see *Search providers*), and then approves the provider item (see *Approve provider items*). To view his previous list of providers he's start checked today, he clears the provider search (see *Clear a search on providers*).

A little later, John Smith returns to this provider to evaluate the provider's treatments (see *Evaluate provider treatments*).

Appointments tab	Providers tab
Approve only treatments and notes	Approve all treatment items such as attachments, forms, perio charts, etc
View only unapproved items for today's appointments	View unapproved provider items for today as well as for previous days
Search on appointments by provider or by patient	Search by provider, provider type, and by provider group
Start check appointments	
Add appointments to the Watched list	
Filter chairs on clinical notification states	
Hide past appointments	
Hide appointments that don't require a start check	
	Display inactive providers
	Display provider lists by year
	Evaluate more than one provider from the Provider details page 

# Evaluations Tab

## About the Evaluations tab

Use the Evaluations tab to display existing evaluations, to view unevaluated treatments, and to search for unevaluated treatments by provider, instructor, or by patient.

### Evaluations

This list contains existing evaluations for today that you can view and delete. In addition, you can resume evaluations that have been held for you (held by you or by another instructor when entering new evaluations).

### Uneval Tx

Unevaluated treatments listed in this tab have been approved but not evaluated today.

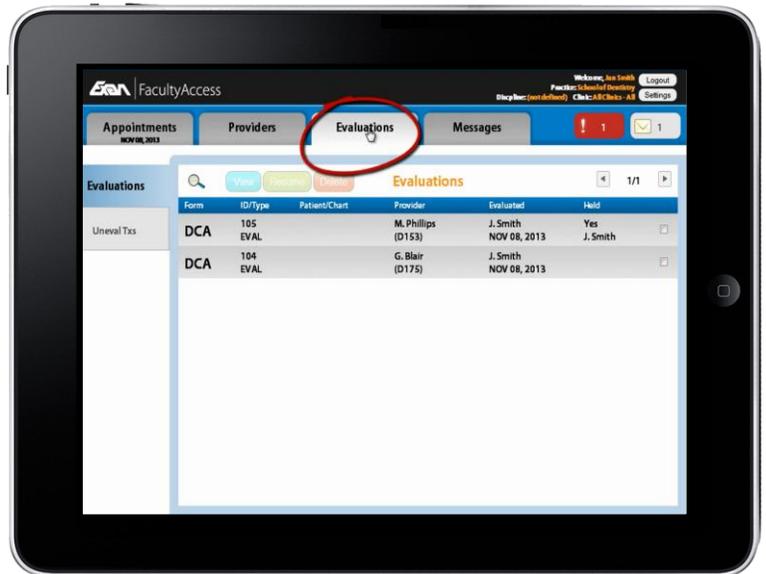
To view a workflow using the Evaluation pages, see *Scenario for using Evaluation pages*.

## Scenario for using Evaluation pages

During her clinic session, Faculty member Jan Smith performed some evaluations in the Providers tab. She taps the Evaluations tab, to display the list of completed evaluations (see *Display evaluations*). For one evaluation, she needs to evaluate treatments multiple times on the original evaluation form (see *Enter cumulative evaluations*). There are also evaluations that have been held for her that she needs to complete. She performs a search on Held evaluations (see *Search evaluations*). With the list of held evaluations displayed, she begins to evaluate them (see *Resume held evaluation forms*).

To see her previous list of evaluations, she clears the search results (see *Clear evaluation search results*). In the Evaluations list, there's an evaluation that requires treatments to be added to it (see *Add treatments to an existing evaluation*).

She taps the Unevaluated treatments tab to view a list of unevaluated treatments (see *Display unevaluated treatments*). Some of them are from a previous session. She needs to perform some evaluations (see *Enter evaluations*).



# Messages Tab

## About the Messages tab

Use the Messages tab to send and receive messages from providers, faculty, administrators and patients. Only patients assigned to your providers appear in the recipient list.

