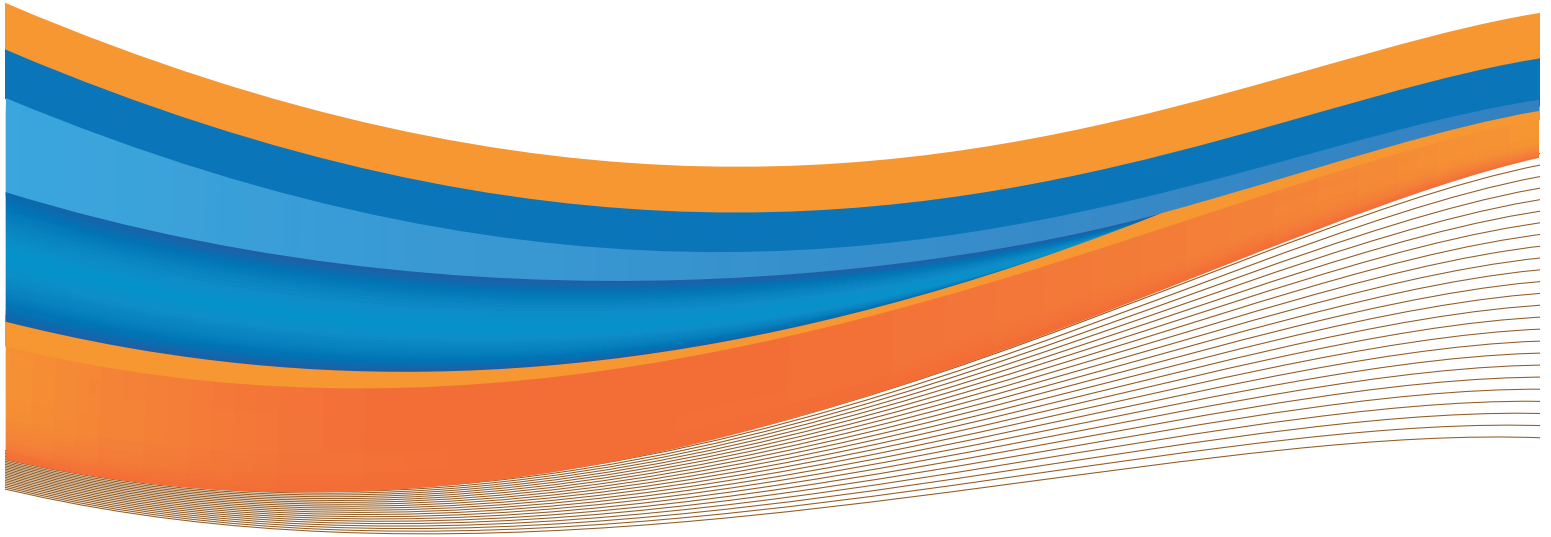


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User Guide for
Exan FacultyAccess



USING EXAN FACULTYACCESS

4

This chapter covers the following topics:

- Managing appointments
- Managing providers
- Managing evaluations
- Managing messages

1 Managing Appointments

You can display a list of appointments for the day in clinics to which you have access. You can view details of an appointment, including treatments and attached notes.

Exan FacultyAccess enables you to drill down on an appointment to see two levels of detail:

1. The first level displays a summary view of the number of unapproved treatment items for the appointment as well as associated notes.
2. The second level displays the clinical details of a treatment item such as the name of the patient and the chart number.

STATUS OF APPOINTMENTS

Appointment Color	Meaning
Gray	This status indicates that the appointment does not require a start-check, or that this appointment has been start-checked by another instructor.
Red	This status indicates that the appointment has not yet been start-checked and requires a start-check.
Green	This status indicates that the appointment has been start-checked by you.

This section describes the main tasks involved in managing appointments:

- Displaying appointments
- Displaying appointments in another clinic
- Displaying appointments by session
- Displaying your appointments
- Displaying appointments filtered on chair status
- Displaying appointments sorted on chair status
- Start-checking appointments
- Start-checking an appointment with an added treatment
- Approving appointment treatments
- Evaluating appointment treatments
- Searching appointments
- Hiding appointments
- Watching appointments

1.1 Displaying Appointments

When you display appointments, you are viewing a list of appointments booked for today in one or all clinic(s) and in one or all session(s). You can view all the treatment items for an appointment as well as a detailed view of a treatment item.

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.

Chair clinical notifications display to the right of each appointment indicating provider requests for start checks, approvals, and assistance. The clinical notification colors may be different in your system because they have been customized in your configuration. For instructions on performing a start check, see *Start Checking Appointments* on page 24.

▼To display details of all appointments in a clinic:

1. Go to the **Appointments** tab, and tap **Today's Appts.**

Provider	Patient	Time	Clinic
Confirmed S. Lee (D170)	P. Jacobs (M33)	09:00 - 10:00	Pre-Docs Clinic 2 PD2-06
Not Confirmed S. Rhabb (D160)	M. Carr (M33)	09:00 - 10:00	Pre-Docs Clinic 2 PD2-09
Not Confirmed D. Tory (D100)	J. Benson (M63)	09:00 - 10:15	Pre-Docs Clinic 2 PD2-08
Not Confirmed E. Langdon (D164)	B. Fairfax (F69)	09:00 - 10:15	Pre-Docs Clinic 2 PD2-07
Not Confirmed T. Gates (D555)	B. Hanson (M44)	09:00 - 10:30	Pre-Docs Clinic 2 PD2-01
Confirmed D. Stanovich (D178)	T. Beatty (M30)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-05
Not Confirmed G. Hopkins (D156)	G. Pearce (M37)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-10
Not Confirmed J. Shui (D174)	K. Bonner (U)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-13
Confirmed D. Caan (D151)	T. Baker (M24)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-03

2. Tap an appointment.

More details of the appointment are displayed such as the number and type of treatment(s), and also associated notes.

Appointments OCT 02, 2013

Providers **Evaluations** **Messages**

My Appts

Watched

Today's Appts

D. Stanovich (D178) 1/1

Patient: T. Beatty (M30) Sec. Prov: N/A Confirmed 09:00 - 11:00

Approve Start Check Watch Evaluate

No Start Check

<input type="checkbox"/>	D2330 - Resin-based comp-1 surf, ant.	Site: 24 Surf: F	Not Evaluated Today
	Location	PreDoc	Prognosis
			Good
<input type="checkbox"/>	NOTE (D2330) - x-ray needed	Site: 24	
	Location	Prognosis	

You can tap a treatment or note to view more details.

Appointments OCT 02, 2013

Providers **Evaluations** **Messages**

My Appts

Watched

Today's Appts

D. Stanovich (D178) 1/1

Patient: T. Beatty (M30) Sec. Prov: N/A Confirmed 09:00 - 11:00

Approve Start Check Watch Evaluate

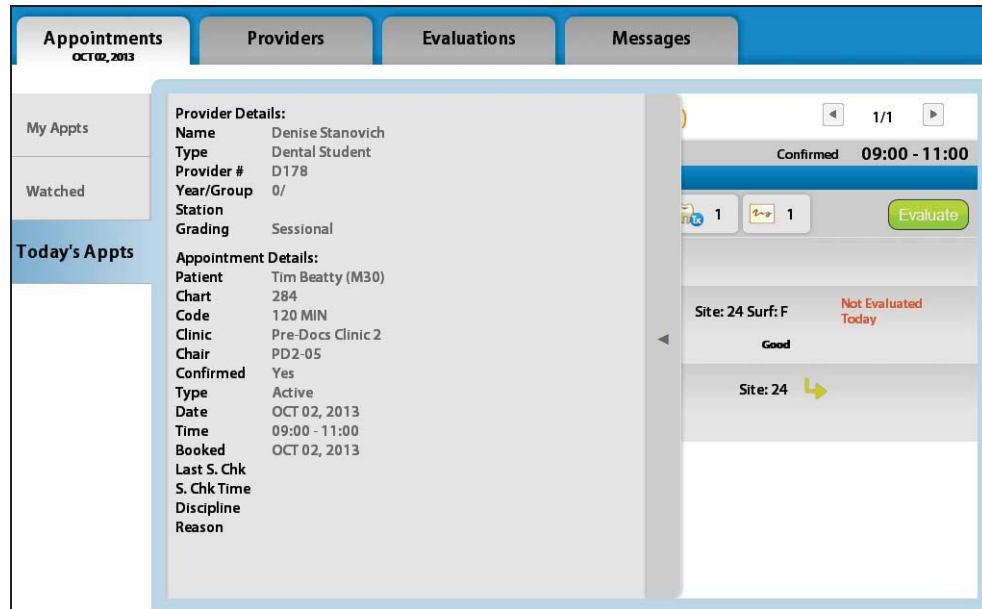
No Start Check

<input type="checkbox"/>	D2330 - Resin-based comp-1 surf, ant.	Site: 24 Surf: F	Not Evaluated Today
	Location	PreDoc	Prognosis
			Good
	Discipline	REST	Diagnoses (+)
	Phase		Periodontal abscess
	Patient	T. Beatty (M30)	Sequence
	Entry Date	OCT 02, 2013	0
	Tx Date	OCT 02, 2013	Chart
	Tx Provider	D. Stanovich (D178)	284
	L. Eval. Date	OCT 01, 2013	Entry User
	L. Eval. Form	DCA	A. Admin
			TRX #
			275
		L. Eval. User	A. Admin
		L. Eval. ID	24

☐ NOTE (D2330) - x-ray needed Site: 24

Location Prognosis

You can also find more appointment details on the provider or patient by selecting the sliding panel.

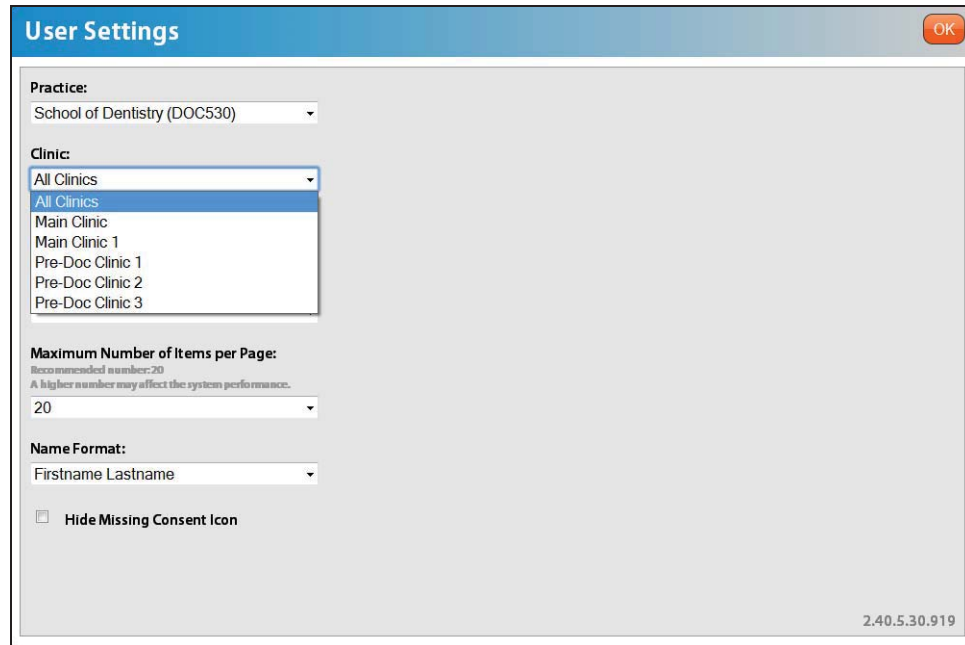


1.2 Displaying Appointments in Another Clinic

Depending on your access rights, you may be able to display appointments in another clinic.

▼To display appointments in another clinic:

1. In the top-right corner of the Header, tap **Settings**.
The User Settings page is displayed.
2. Tap the **Clinic** drop-down list, and then tap a clinic.



The image shows a 'User Settings' dialog box with a blue header bar containing the title 'User Settings' and an 'OK' button. The dialog contains several settings:

- Practice:** A dropdown menu with 'School of Dentistry (DOC530)' selected.
- Clinic:** A dropdown menu with 'All Clinics' selected. A list of options is visible: 'All Clinics', 'Main Clinic', 'Main Clinic 1', 'Pre-Doc Clinic 1', 'Pre-Doc Clinic 2', and 'Pre-Doc Clinic 3'.
- Maximum Number of Items per Page:** A dropdown menu with '20' selected. Below it, small text reads: 'Recommended number: 20. A higher number may affect the system performance.'
- Name Format:** A dropdown menu with 'Firstname Lastname' selected.
- Hide Missing Consent Icon:** An unchecked checkbox.

The version number '2.40.5.30.919' is displayed in the bottom right corner of the dialog.

In the above example, we are currently viewing all appointments in all clinics for the day. Now, we will select the PreDocs Clinic 1.

3. Tap OK.

The Appointments page opens, displaying all appointments in the selected clinic.

Appointments APR 15, 2013	Providers	Evaluations	Messages												
My Appts Watched Today's Appts	<div> <div>My Appointments</div> <div>1/1</div> </div> <table> <tr> <th>Provider</th><th>Patient</th><th>Time</th><th>Clinic</th></tr> <tr> <td>A. Davis (DD32)</td><td>J. Leahy (F24)</td><td>09:00 - 11:00</td><td>PreDocs Clinic 1 PreDocs 1-3</td></tr> <tr> <td>C. Wiid (G152)</td><td>M. Tse (F43)</td><td>09:00 - 11:00</td><td>PreDocs Clinic 1 PreDocs 1-2</td></tr> </table>			Provider	Patient	Time	Clinic	A. Davis (DD32)	J. Leahy (F24)	09:00 - 11:00	PreDocs Clinic 1 PreDocs 1-3	C. Wiid (G152)	M. Tse (F43)	09:00 - 11:00	PreDocs Clinic 1 PreDocs 1-2
Provider	Patient	Time	Clinic												
A. Davis (DD32)	J. Leahy (F24)	09:00 - 11:00	PreDocs Clinic 1 PreDocs 1-3												
C. Wiid (G152)	M. Tse (F43)	09:00 - 11:00	PreDocs Clinic 1 PreDocs 1-2												



Exan FacultyAccess retains this new setting the next time you sign in.

1.3 Displaying Appointments by Session

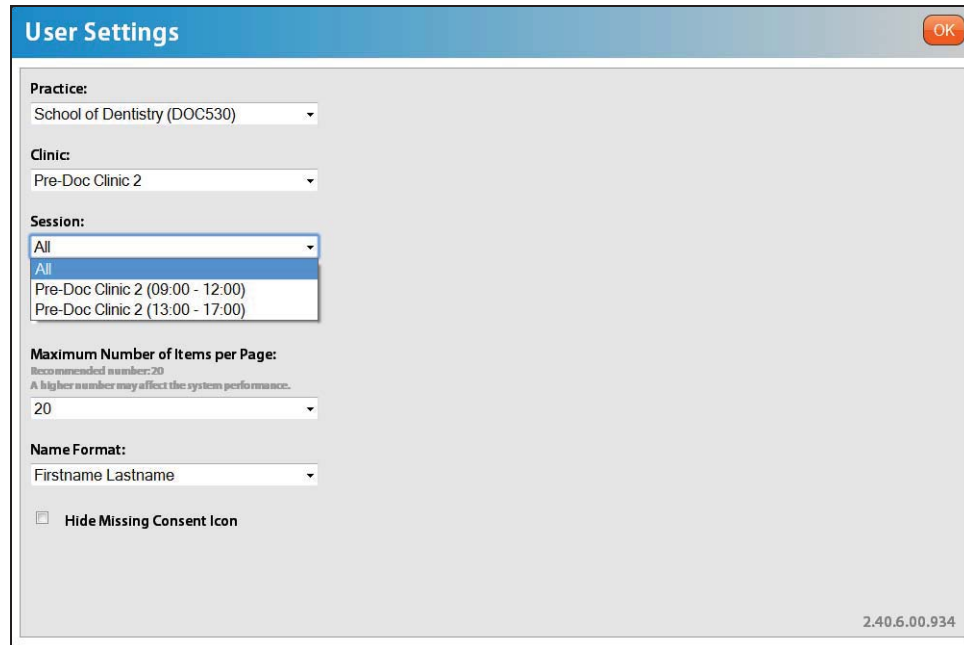
There is a setting that enables you to view all appointments by session.

▼To display appointments by session:

1. In the top-right corner of the Header, tap **Settings**.

The User Settings page is displayed.

2. From the **Clinic** drop-down list, tap a clinic. For example, we will select Pre-Docs Clinic 2.
3. From the **Session** drop-down list, tap a session.



User Settings OK

Practice:
School of Dentistry (DOC530)

Clinic:
Pre-Doc Clinic 2

Session:
 All
 All
 Pre-Doc Clinic 2 (09:00 - 12:00)
 Pre-Doc Clinic 2 (13:00 - 17:00)

Maximum Number of Items per Page:
 Recommended number: 20
 A higher number may affect the system performance.
 20

Name Format:
 Firstname Lastname


☐ Hide Missing Consent Icon

2.40.6.00.934

For example, we will select the Morning (09:00-12:00) session.

4. Tap **OK**.

The Appointments page opens, displaying all appointments for the selected session.

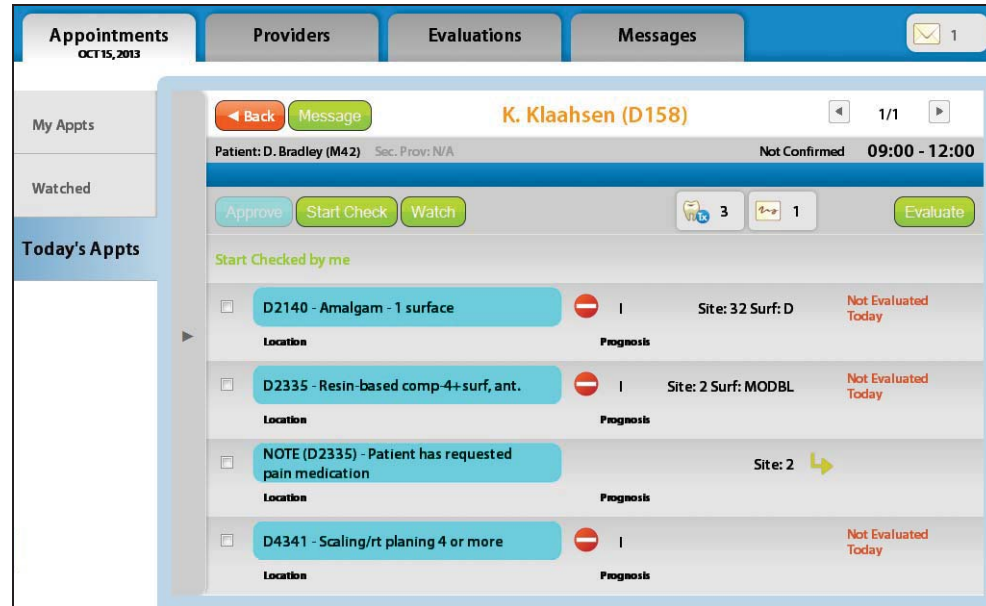


Appointments OCT 11, 2013 Providers Evaluations Messages ! 1 2

My Appts
Watched
Today's Appts

Today's Appointments 1/2

Provider	Patient	Time	Clinic
Confirmed D. Stanovich (D178)	T. Beatty (M30)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-06
Confirmed S. Lee (D170)	P. Jacobs (M33)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-07
Confirmed D. Tory (D100)	J. Benson (M63)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-13
Confirmed E. Langdon (D164)	B. Fairfax (F69)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-09
Confirmed J. Shui (D174)	K. Bonner (U)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-03
Confirmed S. Rhabb (D160)	C. Collins (M27)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-08
Not Confirmed D. Caan (D151)	A. Shu (F25)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-01
Confirmed K. Klaahsen (D158)	D. Bradley (M42)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-05
Confirmed S. Jones (D152)	T. Baker (M24)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-04



The above example shows that:

- The appointment has been start checked by you.
- There are four treatment items (three treatments and one associated note) on the appointment summary.

1.5 Start Checking Appointments

Appointments with a red background require a start check. When you start check an appointment on a provider's appointment page, the appointment also displays on the My Appointments page.

Chair clinical notification states display to the right of each appointment, indicating when you have a request to start check an appointment. The clinical notification colors may be different in your system because they've been customized in your configuration.

You can start-check an appointment up to 30 minutes before the scheduled time and up to the end of the scheduled appointment.

▼To start check an appointment:

1. Go to the **Appointments** tab, and tap **Today's Appts.**

Provider	Patient	Time	Clinic
Confirmed L. Jaaks (D159)	C. Peters (F23)	09:00 - 10:00	Pre-Docs Clinic 2 PD2-10
Confirmed D. Stanovich (D178)	T. Beatty (M30)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-06
Confirmed S. Lee (D170)	P. Jacobs (M33)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-07
Confirmed D. Tory (D100)	J. Benson (M63)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-13
Confirmed E. Langdon (D164)	B. Fairfax (F69)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-09
Confirmed J. Shui (D174)	K. Bonner (U)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-03
Confirmed S. Rhabb (D160)	C. Collins (M27)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-08
Not Confirmed D. Caan (D151)	A. Shu (F25)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-01
Confirmed K. Klaahsen (D158)	D. Bradley (M42)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-05

Appointments with a red background require a start check.

2. Tap an appointment that requires a start check.

K. Klaahsen (D158)

Patient: D. Bradley (M42) Sec. Prov: N/A Confirmed 09:00 - 12:00

Approve Start Check Watch Evaluate

No Start Check

<input type="checkbox"/> D2140 - Amalgam - 1 surface	Location	Prognosis	Site: 32 Surf: D
<input type="checkbox"/> D2335 - Resin-based comp-4+ surf, ant.	Location	Prognosis	Site: 2 Surf: MODBL
<input type="checkbox"/> D4341 - Scaling/rt planing 4 or more	Location	Prognosis	

3. Tap **Start Check**.

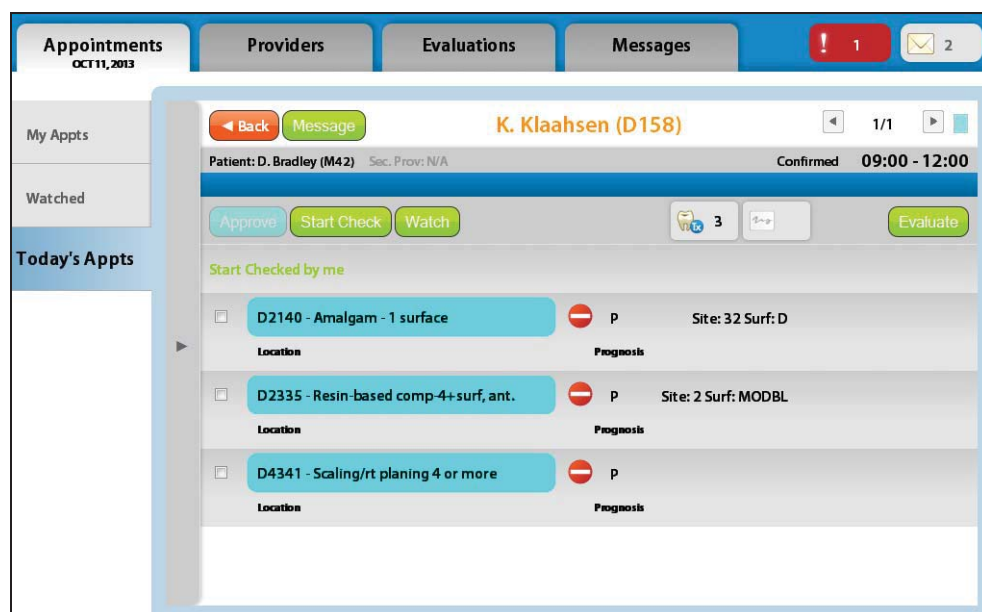
Exan FacultyAccess displays the start check notice.

4. Tap **OK**.

The start-check confirmation message indicates that the appointment has been successfully start checked.

5. Tap **Close**.

Exan FacultyAccess displays this appointment in My Appts. Green text above the appointment “Start Checked by me” is displayed.



Now you can view the provider's appointment on the instructor's list of assigned providers on the My Providers/Today's Providers pages.

For instructions on clearing a start check indicator, see *Start Checking Appointments* on page 24.



You can also start check an appointment that has already been start-checked by another instructor. Doing so will place this appointment under your list.

1.6 Start Checking an Appointment with an Added Treatment

If a treatment is added to an appointment that has been start checked, the appointment should be start checked again.

▼To start check an appointment that has been previously start checked:

1. Tap the appointment. The example below shows that J. Shui added a treatment item during his 9:00-11:30 AM session, as indicated by the area highlighted in red.

Provider	Patient	Time	Clinic
Confirmed S. Lee (D170)	P. Jacobs (M33)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-07
Confirmed D. Stanovich (D178)	T. Beatty (M30)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-06
Confirmed D. Tory (D100)	J. Benson (M63)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-13
Confirmed E. Langdon (D164)	B. Fairfax (F69)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-09
Confirmed J. Shui (D174)	K. Bonner (U)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-03
Confirmed L. Jaaks (D159)	C. Peters (F23)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-10
Confirmed S. Rhabb (D160)	C. Collins (M27)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-08
Not Confirmed D. Caan (D151)	A. Shu (F25)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-01
Confirmed K. Klaahsen (D158)	D. Bradley (M42)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-05

The “No Start Check” heading is displayed above the added treatment item.

2. Tap **Start Check**.

The Start Check notice is displayed.

3. Tap **OK**.

The Start Check confirmation is displayed. Now, the appointment no longer displays the small red start-check icon.

1.7 Approving Appointment Treatments

You can approve an appointment and treatment items, including notes associated with the treatments.

▼To approve a treatment:

1. Go to the **Appointments** tab, and tap **My Appts**.
2. Tap an appointment.

The appointment provider details page is displayed.

3. Tap one or more treatments that require instructor approval. For example, we will select K. Klaahsen's appointment.

Appointments OCT 15, 2013 Providers Evaluations Messages 1

My Appts
Watched
Today's Appts

Back Message K. Klaahsen (D158) 1/1

Patient: D. Bradley (M42) Sec. Prov: N/A Not Confirmed 09:00 - 12:00

Approve Start Check Watch 3 1 Evaluate

Start Checked by me

<input type="checkbox"/>	D2140 - Amalgam - 1 surface	—	I	Site: 32 Surf: D	Not Evaluated Today
	Location		Prognosis		
<input type="checkbox"/>	D2335 - Resin-based comp-4+surf, ant.	—	I	Site: 2 Surf: MODBL	Not Evaluated Today
	Location		Prognosis		
<input type="checkbox"/>	NOTE (D2335) - Patient has requested pain medication			Site: 2	
	Location		Prognosis		
<input type="checkbox"/>	D4341 - Scaling/rt planing 4 or more	—	I		Not Evaluated Today
	Location		Prognosis		

4. Tap one or more check boxes next to the unapproved treatment item(s).

Appointments OCT 11, 2013 Providers Evaluations Messages 1 2

My Appts
Watched
Today's Appts

Back Message K. Klaahsen (D158) 1/1

Patient: D. Bradley (M42) Sec. Prov: N/A Confirmed 09:00 - 12:00

Approve Start Check Watch 3 Evaluate

Start Checked by me

<input checked="" type="checkbox"/>	D2140 - Amalgam - 1 surface	—	P	Site: 32 Surf: D	
	Location		Prognosis		
<input checked="" type="checkbox"/>	D2335 - Resin-based comp-4+surf, ant.	—	P	Site: 2 Surf: MODBL	
	Location		Prognosis		
<input checked="" type="checkbox"/>	D4341 - Scaling/rt planing 4 or more	—	P		
	Location		Prognosis		

5. Tap Approve.

Exan FacultyAccess displays the Approvals - Validate page.

Approvals - Validate
Cancel Approve

D2140 - Amalgam - 1 surface		P	Site: 32 Surf: D	Validated
Location		Prognosis		
Discipline	REST	Diagnoses (+)	Cervical caries	
Phase		Sequence	0	
Patient	D. Bradley (M42)	Chart	290	
Entry Date	OCT 01, 2013	Entry User	A. Admin	
Tx Date	OCT 01, 2013	TRX #	349	
Tx Provider	J. Simpson (D154)			

D2335 - Resin-based comp-4+surf, ant.		P	Site: 2 Surf: MODBL	Validated
Location		Prognosis		
Discipline	REST	Diagnoses (+)	Cervical caries	
Phase		Sequence	0	
Patient	D. Bradley (M42)	Chart	290	
Entry Date	OCT 01, 2013	Entry User	A. Admin	
Tx Date	OCT 01, 2013	TRX #	350	
Tx Provider	K. Klaahsen (D158)			

D4341 - Scaling/rt planing 4 or more		P		Validated
Location		Prognosis		
Discipline	REST	Diagnoses		
Phase		Sequence	0	

6. Review the item(s) including any warnings/errors on this page.
7. Tap **Approve** to complete the approval of the item(s).

Exan FacultyAccess displays the Approvals - Complete page listing the approved item(s).

Approvals - Complete				Close	Evaluate
D2140 - Amalgam - 1 surface	P	Site: 32 Surf: D	Approved	✓	
D2335 - Resin-based comp-4+surf, ant.	P	Site: 2 Surf: MODBL	Approved	✓	
D4341 - Scaling/rt planing 4 or more	P		Approved	✓	

In the example above, the approved treatment items now display green check marks to indicate that the treatments have been approved.

You have the option here to evaluate the approved treatments. For instructions on evaluating a treatment, see *Evaluating Appointment Treatments* on page 35.

8. Tap **Close** to return to the provider appointment page.

Appointments
OCT 11, 2013

Providers

Evaluations

Messages

1

2

My Appts

Watched

Today's Appts

Back

Message

K. Klaahsen (D158)

1/1

Patient: D. Bradley (M42)

Sec. Prov: N/A

Confirmed

09:00 - 12:00

Approve

Start Check

Watch

Evaluate

Start Checked by me

✓

D2140 - Amalgam - 1 surface

Location

Prognosis

✓

D2335 - Resin-based comp-4+surf, ant.

Location

Prognosis

✓

D4341 - Scaling/rt planing 4 or more

Location

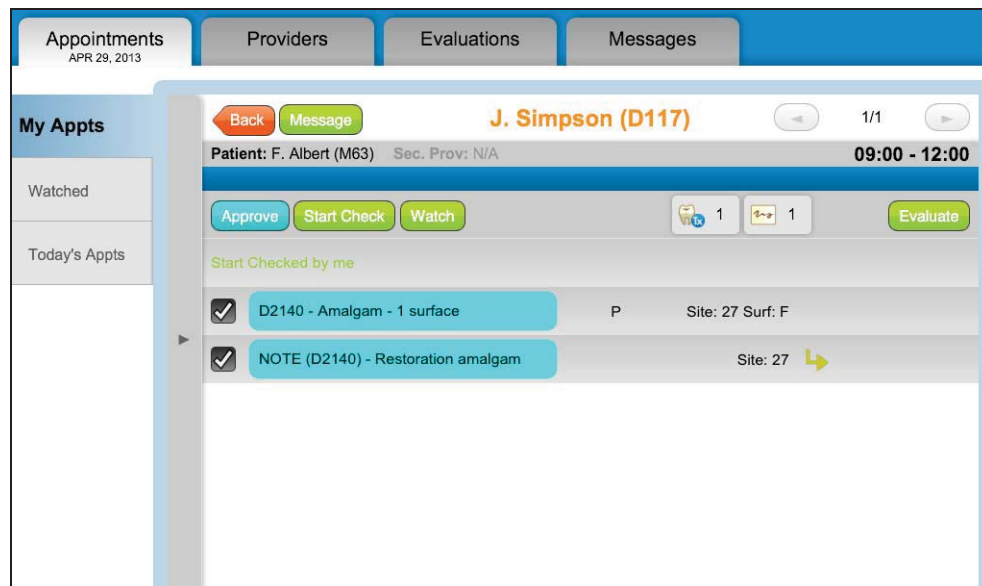
Prognosis

1.8 Editing an Unapproved Treatment Note

If you have one or more notes attached to an unapproved treatment, you can edit this note during the approval stage.

▼ **To edit a note attached to an unapproved treatment:**

1. Go to an appointment provider details page, and check the check boxes next to one or more unapproved treatments that include a note.



2. Tap **Approve**.

Approvals - Validate Cancel Approve

D2140 - Amalgam - 1 surface P Site: 27 Surf: F Validated ✓

Discipline	REST	Diagnosis	0
Phase		Sequence	0
Location		Prognosis	0
Patient	F. Albert (M63)	Chart	274
Entry Date	APR 29, 2013	Entry User	J. Simpson
Tx Date	APR 29, 2013	TRX #	837
Tx Provider	J. Simpson (D117)		

NOTE (D2140) - Restoration amalgam Site: 27 Validated ✓

Phase	0	Sequence	0
Code	0	Prognosis	0
Patient	F. Albert (M63)	Chart	274
Entry Date	APR 29, 2013	Entry User	J. Simpson
Code			
Note	Restoration amalgam		

Edit on approval? ☐


3. On the **Approvals - Validate** page, click the **Edit on approval?** check box to select it.
4. Tap **Approve**.

The Approvals - Edit Note pop-up appears.

Approvals - Edit Note Cancel Approve

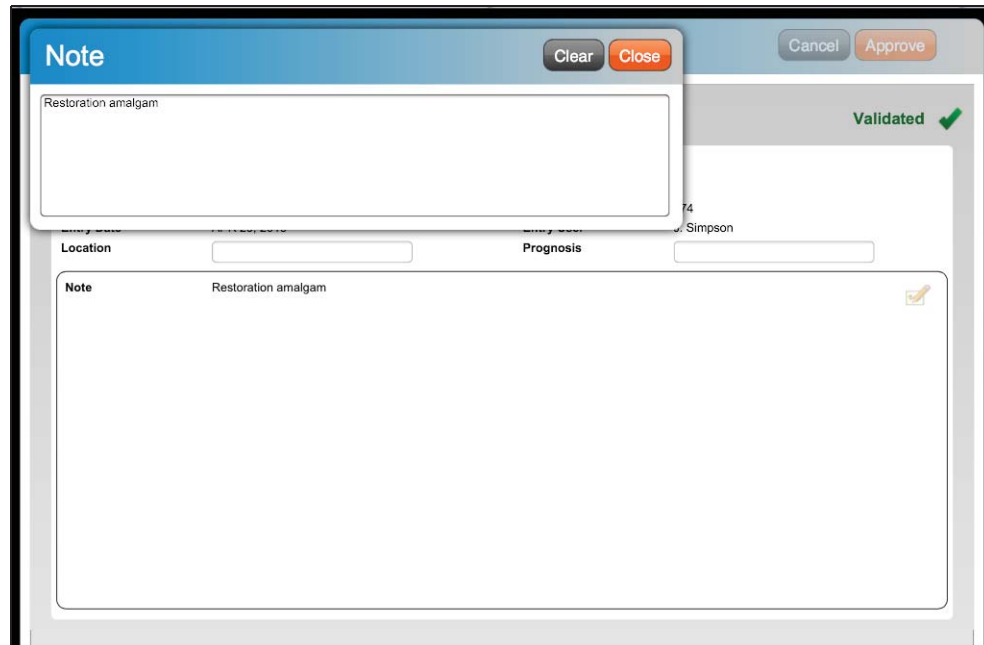
NOTE (D2140) - Restoration amalgam Site: 27 Validated ✓

Phase	0	Sequence	0
Code	0	Prognosis	0
Patient	F. Albert (M63)	Chart	274
Entry Date	APR 29, 2013	Entry User	J. Simpson
Location		Prognosis	
Note	Restoration amalgam		

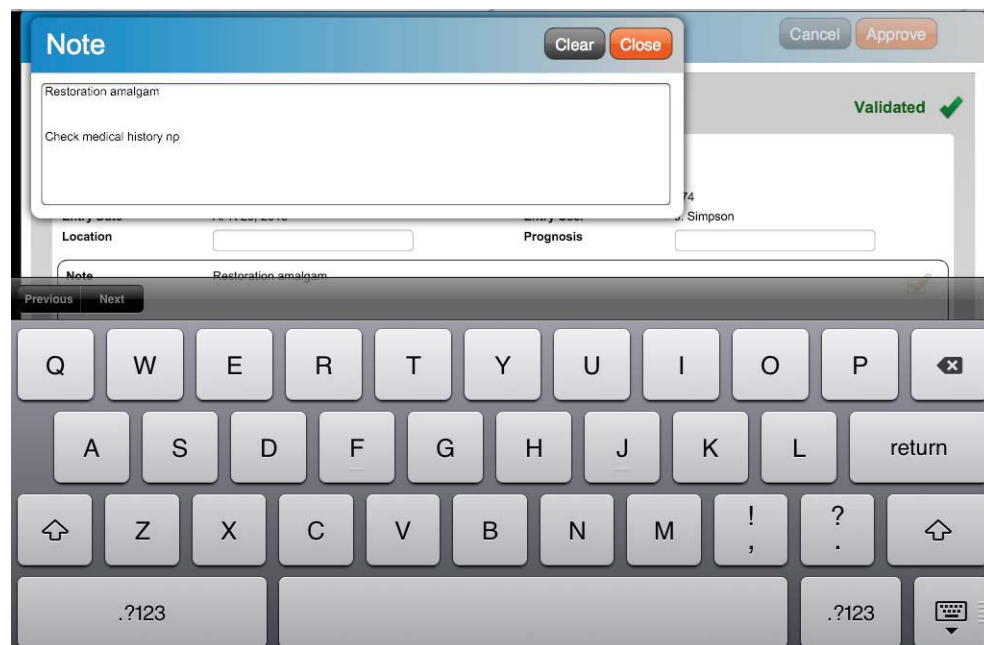



5. Tap the  (**Small note**) icon in the **Note** area.

The Note pop-up appears.



6. Tap the **Note** area to display the on-screen keyboard, and make your edit.



7. Tap the  (**Close on-screen keyboard**) icon when you have finished editing.
8. Tap **Close**. The Approvals - Edit Note pop-up appears.

9. Tap Approve.

The Approvals - Complete page is displayed.

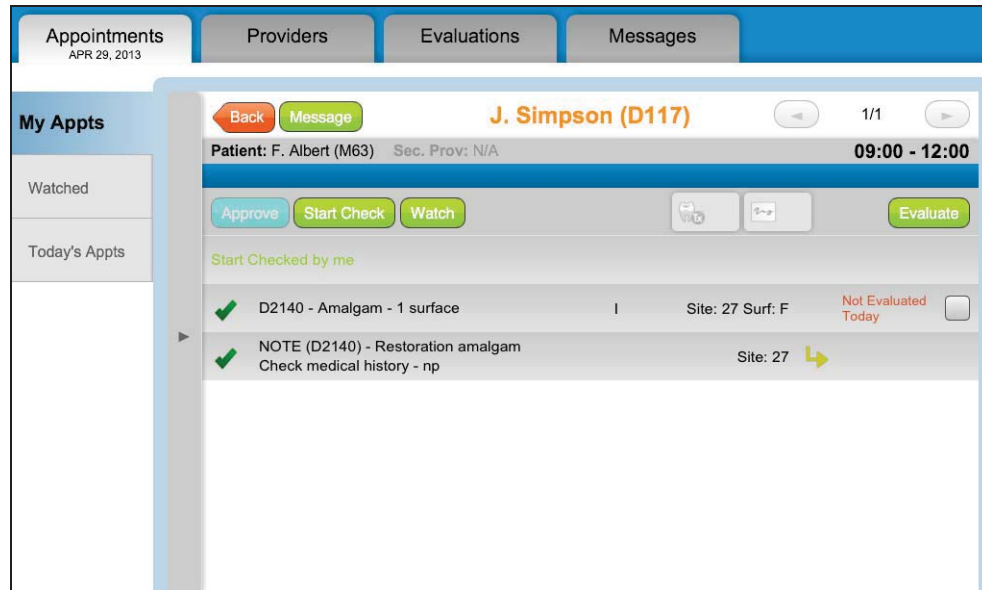
The screenshot shows a mobile application interface titled "Approvals - Complete". At the top right, there are two buttons: "Close" and "Evaluate". The main content area lists two treatments, both marked as "Approved" with green checkmarks.

Treatment Description	Site	Status
D2140 - Amalgam - 1 surface	I Site: 27 Surf: F	Approved ✓
NOTE (D2140) - Restoration amalgam Check medical	Site: 27	Approved ✓

You may evaluate the treatment here. For instructions on evaluating a treatment, see *Evaluating Appointment Treatments* on page 35.

10. Tap Close to complete the approval process.

The provider details page is displayed. Green check mark next to treatments indicate that they have been approved.



1.9 Evaluating Appointment Treatments

You can perform evaluations on appointment treatments. On the appointment provider details page, the:

- Red text “Not Evaluated Today” next to a treatment indicates that the treatment requires grading, but has not been graded today.
- Green text “Evaluated by Me” next to a treatment indicates that you as the instructor graded the evaluation today one or more times.
- Gray text “Evaluated Today” next to a treatment indicates that another instructor graded the evaluation one or more times.
- Gray text “Not Evaluated Today” next to a treatment indicates that the provider does not require sessional or periodic grading.

▼To evaluate an appointment treatment:

1. Go to the **Appointments** tab, and tap **My Appts**.
2. Select an appointment.

The appointment provider details page is displayed.

3. Tap one or more check boxes next to treatments that require an evaluation.

Appointments APR 15, 2013 Providers Evaluations Messages

My Appts

Watched

Today's Appts

G. Atkins (DD590) 1/1

Patient: J. Benson (M63) Sec. Prov: N/A 09:00 - 11:00

Approve Start Check Watch Evaluate

Start Checked by me

✓	D0120 - Periodic oral evaluation	I	Not Evaluated Today	✓
✓	D2740 - Crown - porcelain/ceramic subs	I	Site: 25 Not Evaluated Today	✓
✓	NOTE (D2740) - Perio check needed	Site: 25		

4. Tap **Evaluate**.

The Evaluation form selection page is displayed.

Evaluation Close

Prov: G. Atkins (DD590)

Grd: Sessional ☐ General Evaluation

Req	Patient	Chart	Tx #	Eval
✓	J. Benson (M63)	273	2	
✓	D0120 - Periodic oral e...	DD590	I	
✓	D2740 - Crown - porcel...	DD590	I	25

New Evaluation My Evaluations APR 15, 2013 Cumulative Evaluation

Grading Discipline: Continue

Form

DCA Daily Clinical Evaluation

DIAG Diagnostic Evaluation Form

In the example above, J. Benson has two treatments that can be evaluated.



After completing a new evaluation, the instructor may choose another provider to grade against the same appointment treatments, by selecting the

Prov:  (ellipsis) button.

5. Tap an evaluation form. In this example, we will select the DCA form.

If the selected evaluation form contains treatment-specific questions for the treatments being evaluated, the treatments will be highlighted on the left.

6. Tap **Continue**.

The following example below shows the general criteria for evaluating an appointment, and below this, more specific criteria for a treatment. In this example, there are specific treatment criteria associated with the D0150 - Comprehensive oral evaluation procedure.

J. Benson (273) - DCA Back Submit

Prov: G. Atkins Time (hrs): 15 APR 2013
 Inst: J. Smith ☐ Competency Discipline:

This form cannot be held.

Add/Edit Comment Clear Grade

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	<input type="text"/>	
Preparedness	<input type="text"/>	
Technical Competence	<input type="text"/>	
Clinical Judgement	<input type="text"/>	
Patient Management	<input type="text"/>	
D0120 - Periodic oral evaluation		
Tx Specific Grade	<input type="text"/>	
Technical Competence	<input type="text"/>	

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment

7. Enter grades for each evaluation criterion.



You can use the Grading Scheme to quickly enter a grade.

8. Tap **Submit** to complete the evaluation form.

The evaluation form selection page is displayed.

The completed evaluation form (in this example, DCA 409) is displayed in the right column of the page. You can view this completed evaluation on the Evaluation page in the Evaluations tab.

You can also perform a cumulative evaluation. For instructions on entering a cumulative evaluation, see *Editing Evaluation Forms* on page 82.

9. Tap **Close** to return to the appointment providers details page.

1.10 Clearing a Clinical Notification Indicator

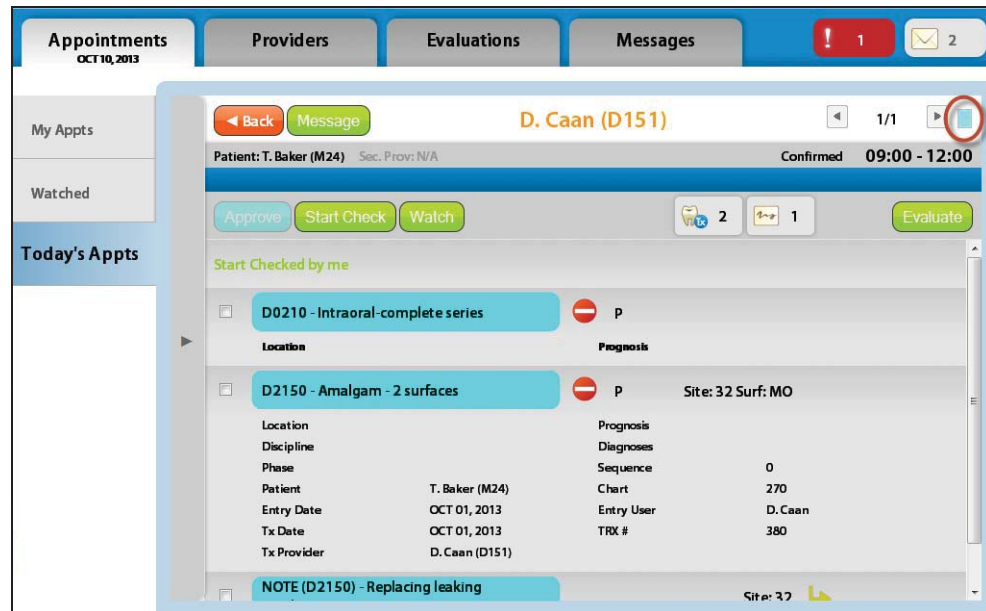
A clinical notification indicator for the chair/session is displayed on an appointment. After you have responded to a provider's request, such as a request for a start check, approval or assistance, you can clear the clinical notification indicator.



The clinical notification colors you see may be different because they have been customized in your configuration.

▼To clear a chair clinical notification state:

1. Go to the **Appointments** tab, and tap **Today's Appts/My Appts/Watched**.
2. Tap an appointment.



3. Tap the clinical notification state colored box (circled in the above example).

The Notification State confirmation pop-up appears.



4. Tap **Clear** to clear the clinical notification on the appointment.

1.11 Filtering Appointments on Chair Notification States

At the beginning or during a session, you can filter an appointment list on chair notification states; for example, you can filter the appointment list based on start check and approval requests.

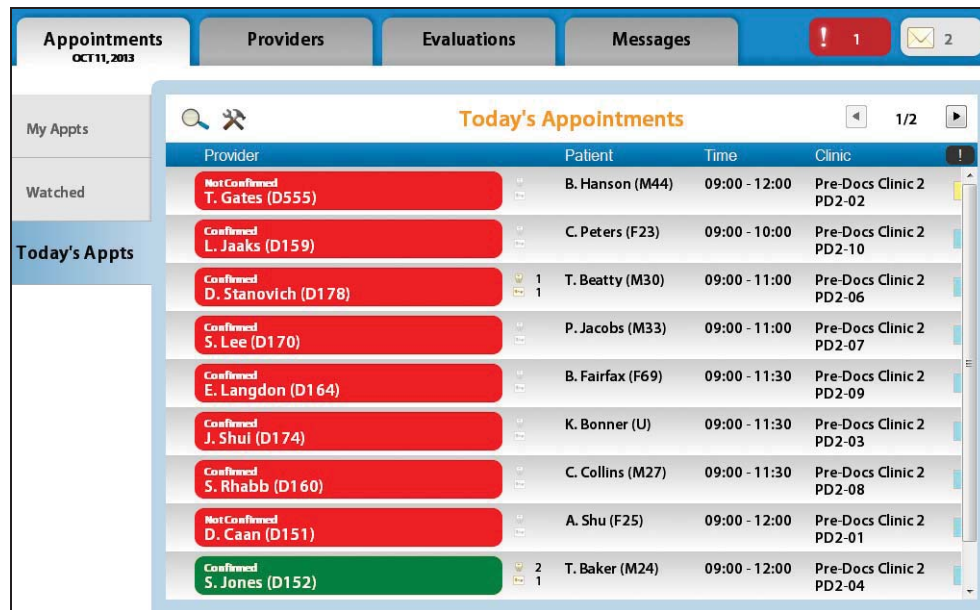
In the above example, appointments have been filtered to show only those with start check and approval requests.

1.12 Sorting Appointments on Chair Notification States

You can sort chair notification states based on the priority order of the chair notification states (highest to lowest, set by your dental institution) and the time of the clinical notification request.

▼To sort appointments on clinical notification states:

1. On the **MyAppts/Watched/Today's Appts** page, tap  (Sort) to sort the list by clinical notification states.



Provider	Patient	Time	Clinic
Not Confirmed T. Gates (D555)	B. Hanson (M44)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-02
Confirmed L. Jaaks (D159)	C. Peters (F23)	09:00 - 10:00	Pre-Docs Clinic 2 PD2-10
Confirmed D. Stanovich (D178)	T. Beatty (M30)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-06
Confirmed S. Lee (D170)	P. Jacobs (M33)	09:00 - 11:00	Pre-Docs Clinic 2 PD2-07
Confirmed E. Langdon (D164)	B. Fairfax (F69)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-09
Confirmed J. Shui (D174)	K. Bonner (U)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-03
Confirmed S. Rhabb (D160)	C. Collins (M27)	09:00 - 11:30	Pre-Docs Clinic 2 PD2-08
Not Confirmed D. Caan (D151)	A. Shu (F25)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-01
Confirmed S. Jones (D152)	T. Baker (M24)	09:00 - 12:00	Pre-Docs Clinic 2 PD2-04


In the above example, we can see that the appointments have been sorted by the urgency of the request and by the time of the requests. The request for non-urgent assistance is listed above requests for a start check.

2. To change the way that the list is sorted, tap a different column.

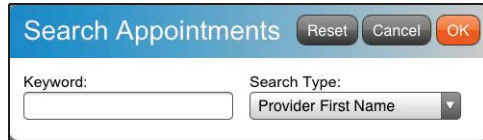
You can search appointments by provider using search criteria to list appointments for a provider. You can search by a provider's first or last name, or by provider code.

You can also search for appointments on patient first/last names.

▼To search for an appointment:

1. Go to the **Appointments** tab, and tap **Today's Appts.**
2. Tap  (**Search Appointments**).

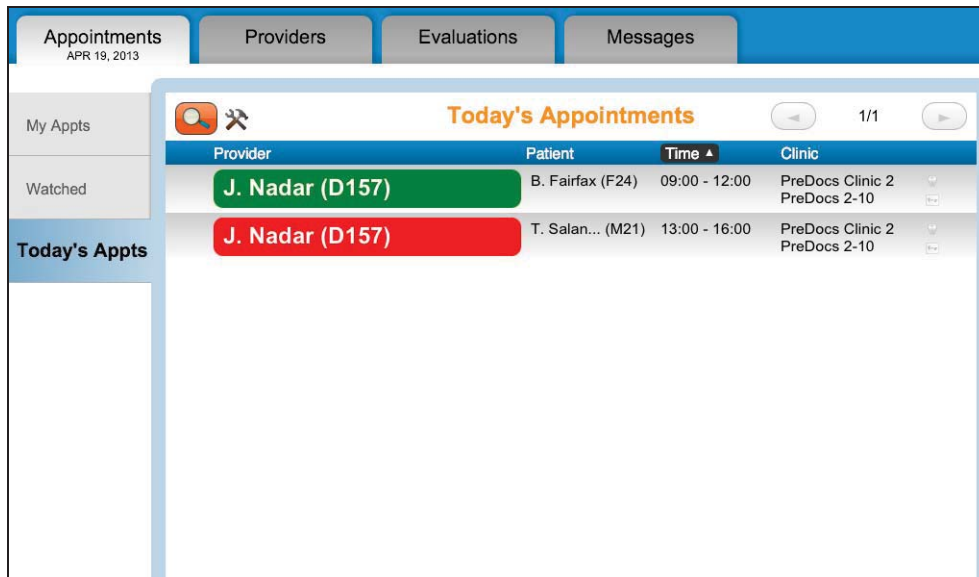
The Search Appointments pop-up is displayed.



The form is titled "Search Appointments" and includes "Reset", "Cancel", and "OK" buttons. It has a "Keyword:" text input field and a "Search Type:" dropdown menu currently set to "Provider First Name".


3. Do the following:
 - Tap the **Keyword** box, and using the on-screen keyboard, enter a keyword. For example, we will enter *James*.
 - From the **Search Type** drop-down list, choose a type. For example, we will choose **Provider First Name**.
4. Tap **OK**.

The content area displays the search results. For example, all appointments for providers with the first name James are displayed in the content area:



The screenshot shows the "Today's Appointments" screen with a search overlay. The search results list two appointments for provider J. Nadar (D157).

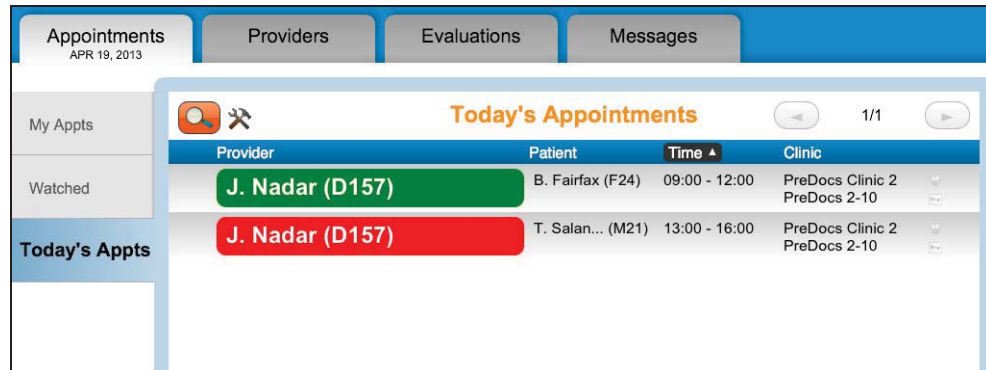
Provider	Patient	Time	Clinic
J. Nadar (D157)	B. Fairfax (F24)	09:00 - 12:00	PreDocs Clinic 2 PreDocs 2-10
J. Nadar (D157)	T. Salan... (M21)	13:00 - 16:00	PreDocs Clinic 2 PreDocs 2-10

This  (Search) icon with a red background, above the search results, indicates that the currently displayed list is being filtered. After you have completed your search, you can clear the search to display all appointments again.

Clearing Appointment Search Results

▼To clear the search results:

1. Go to the **Appointments** tab, and tap **Today's Appts.**



2. Tap  (Clear Search).

The Search Appointments pop-up appears.

3. Tap **Reset**.

Exan FacultyAccess clears the search box.


4. Tap **OK**.

The Today's Appointments page is refreshed, displaying a list of all appointments.

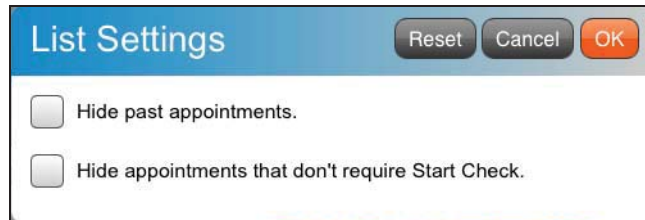
1.13 Hiding Appointments

You can choose to hide all past appointments, or hide appointments that you do not need to start check.

▼To hide appointments:

1. Go to the **Appointments** page, and tap **Today's Appts.**
2. Tap  (**List Settings**).

The List Settings pop-up appears.



3. Do one or both of the following:
 - Tap **Hide past appointments.**
 - Tap **Hide appointments that don't require Start Check.**
4. Tap **OK.**

The Today's Appointments page is displayed. Depending on your selection past appointment and appointments not requiring a start check are hidden.



Exan PatientAccess saves your selection(s) as your default setting(s). If you do not want these as your default settings, remember to deselect the 'Hide' options.

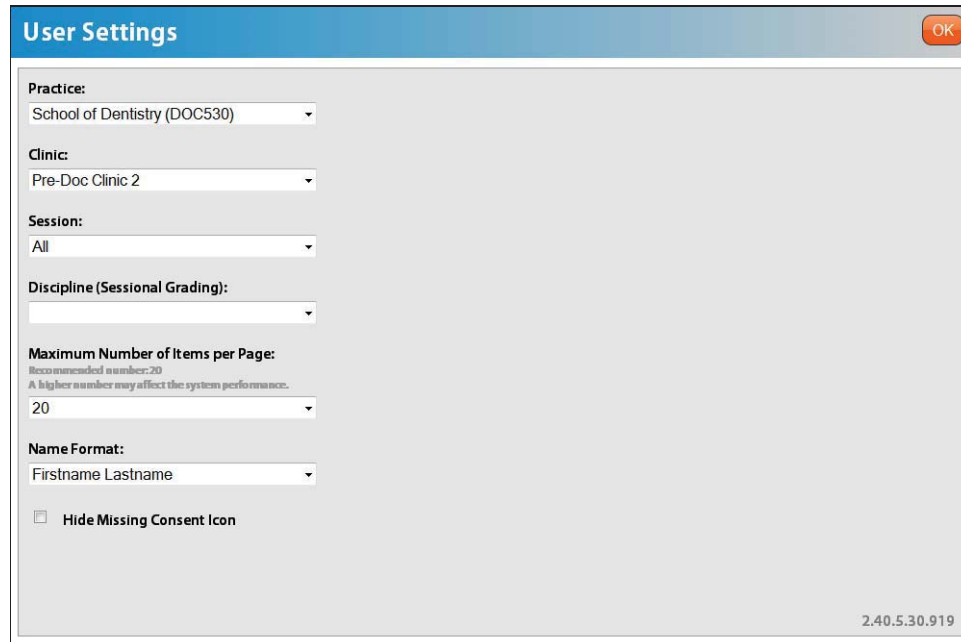
Most of the configuration for Exan FacultyAccess is done from the FAAdmin page. However, some configuration is done within Exan FacultyAccess. These are documented in this chapter.

1.14 Hiding Missing Consent Icons

You can hide missing consent icons in appointment or provider details.

▼To hide missing consent icons:

1. Tap  (User Settings).



The image shows a 'User Settings' dialog box with a blue header and an 'OK' button in the top right corner. The settings are organized into several sections:

- Practice:** A dropdown menu showing 'School of Dentistry (DOC530)'.
- Clinic:** A dropdown menu showing 'Pre-Doc Clinic 2'.
- Session:** A dropdown menu showing 'All'.
- Discipline (Sessional Grading):** A dropdown menu that is currently empty.
- Maximum Number of Items per Page:** A dropdown menu showing '20'. Below this, there is a note: 'Recommended number: 20. A higher number may affect the system performance.'
- Name Format:** A dropdown menu showing 'Firstname Lastname'.
- Hide Missing Consent Icon:** A checkbox that is currently unchecked.

The version number '2.40.5.30.919' is displayed in the bottom right corner of the dialog box.

2. Tap the **Hide Missing Consent Icon** check box.
3. Tap the **OK** button.

1.15 Watching Appointments

If you want to monitor specific appointments, you can use the Watch option to mark these appointments as being watched. Marking appointments to be watched results in the appointments displaying on the My Appointments page (if start checked by you), Today's Appointment page, and the Watched Appointments page.

You can use the Watched Appointment list if an instructor leaves the clinic floor temporarily, and asks you to supervise their appointments.

This section covers the following topics:

- Adding appointments to the Watch list
- Clearing appointments from the Watch list

Adding Appointments to the Watched List

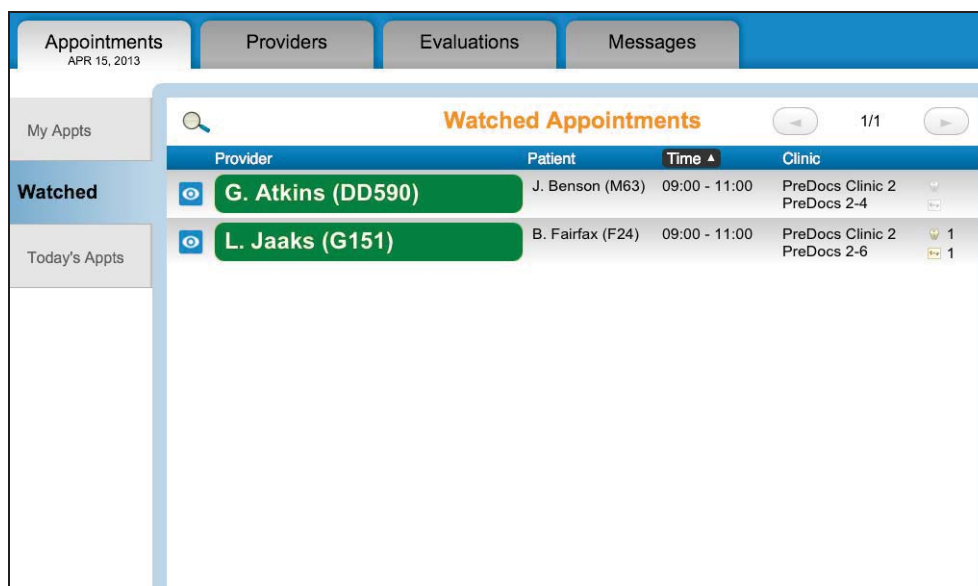
▼To add appointments to the Watched list:


1. Go to the **Appointments** tab, and tap **My Appts/Today's Appts**.
2. Tap an appointment to display the appointment providers details page.
3. Tap **Watch**.

Exan FacultyAccess prompts, “Do you wish to watch all appointments under this provider?”

4. If you:
 - Want to watch all appointments under this provider, tap **Yes**.
 - Do not want to watch all appointments, tap **No**.

Depending on your selection, Exan FacultyAccess either adds a single appointment, or all of the selected provider's appointments for today to the watch list.



If you tap the All Appointments page, you will see that those providers who are being “watched” are marked with the  (Watched) icon.

Clearing an Appointment from the Watched List

▼To clear an appointment from the Watched list:


1. Go to the **Appointments** tab, and tap **Watched**.
2. Tap an appointment.
3. Tap **Unwatch**.

Exan FacultyAccess refreshes the page, and removes the appointment(s) from the Watched Appointments list.

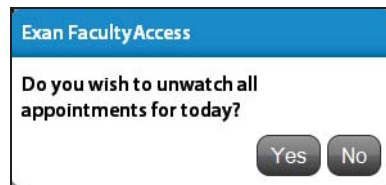
Clearing All Appointments From the Watched List

You can quickly clear all appointments on the Watched list.

▼To clear all appointments on the Watched list:

1. On the **Watched Appointments** page, tap the  (**Unwatch All**) button.

A confirmation message prompts you to unwatch all appointments for today.



2. Tap **Yes** to unwatch all appointments.

2 Managing Providers

You can display a list of providers with reserved chairs for the day in a specific clinic that includes details of provider items. Provider items may consist of treatments, notes, EPR forms, clinical findings, periodontal charts, and letters.

This section covers the following topics:

- Displaying providers with reserved chairs in a specific clinic
- Displaying providers you start-checked today
- Searching providers
- Displaying unapproved items

- Approving treatment items
- Searching for unapproved items
- Evaluating treatments

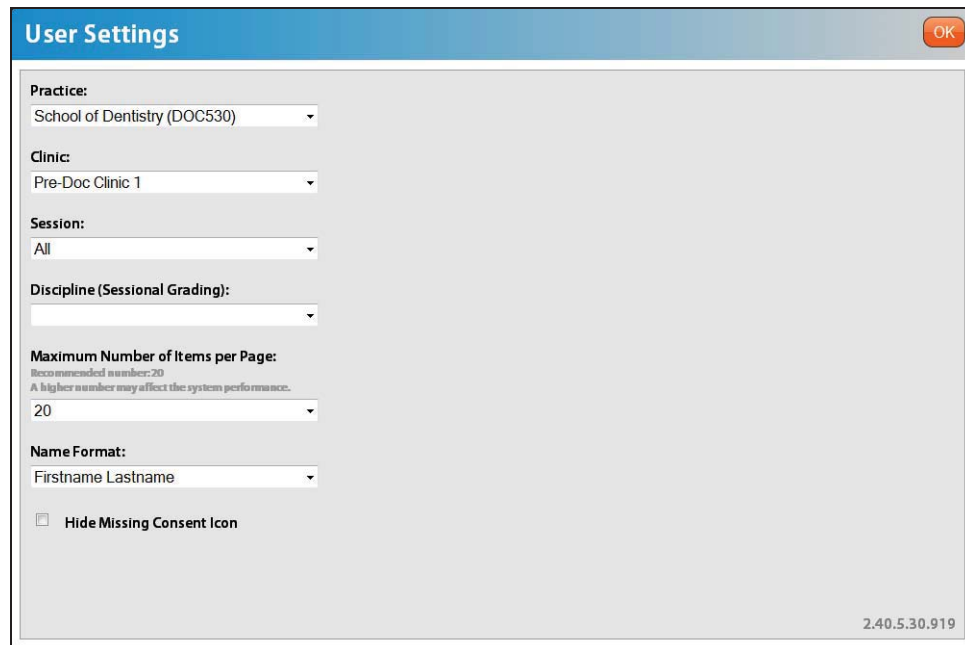
2.1 Displaying Providers with Reserved Chairs in a Specific Clinic

Depending on your access rights, you may be able to display a list of all providers who have reserved chairs in a specific clinic for today.

▼To display all providers with reserved chairs in a specific clinic:

1. Go to the **Providers** tab, and tap **Today's Provs**.
2. Tap **Settings** in the top-right area of the page.

The User Settings page appears. The example below indicates that the providers displayed on the list on the Today's Provs page are from the PreDocs Clinic 1.



The screenshot shows a 'User Settings' dialog box with a blue header and an 'OK' button in the top right corner. The settings are as follows:

- Practice:** School of Dentistry (DOC530)
- Clinic:** Pre-Doc Clinic 1
- Session:** All
- Discipline (Sessional Grading):** (Empty dropdown)
- Maximum Number of Items per Page:** 20 (Recommended number: 20. A higher number may affect the system performance.)
- Name Format:** Firstname Lastname
- ☐ Hide Missing Consent Icon

The version number 2.40.5.30.919 is displayed in the bottom right corner of the dialog box.

If you have access to other clinics, you can view a list of providers with reserved chairs in other clinics.

3. Tap the **Clinic** drop-down list, and tap a different clinic. For example, we will select PreDocs Clinic 2.

2.2 Displaying Providers You Start Checked Today

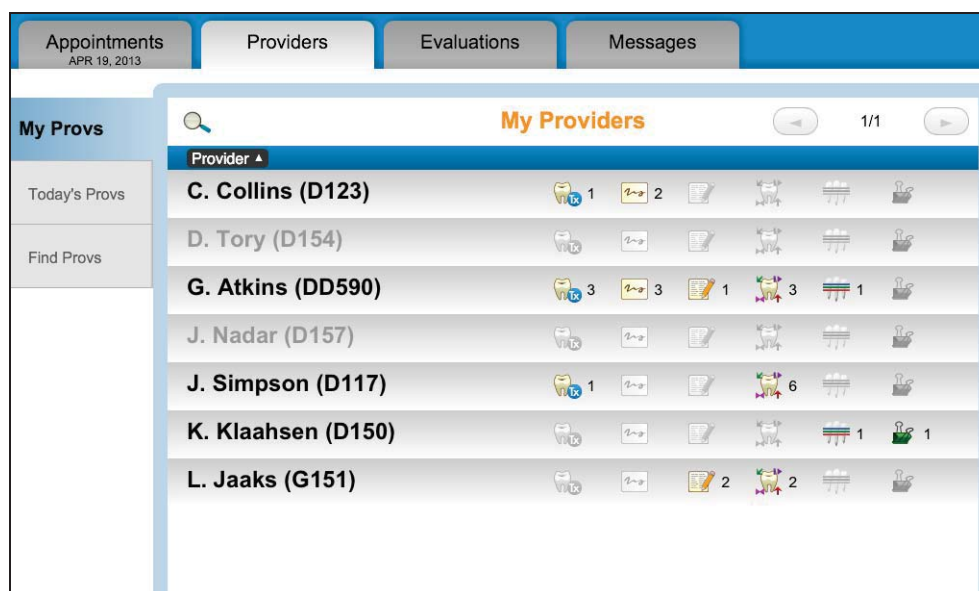
Exan FacultyAccess enables you to view a list of providers who are under your supervision as well as the number of unapproved items for each provider. At a glance, you can view the number of treatments, notes, EPR forms, clinical findings, periodontal charts, and letters that need to be approved. Items approved today are also displayed.

▼To display a list of your providers:

1. Go to the **Providers** tab, and tap **My Provs**.

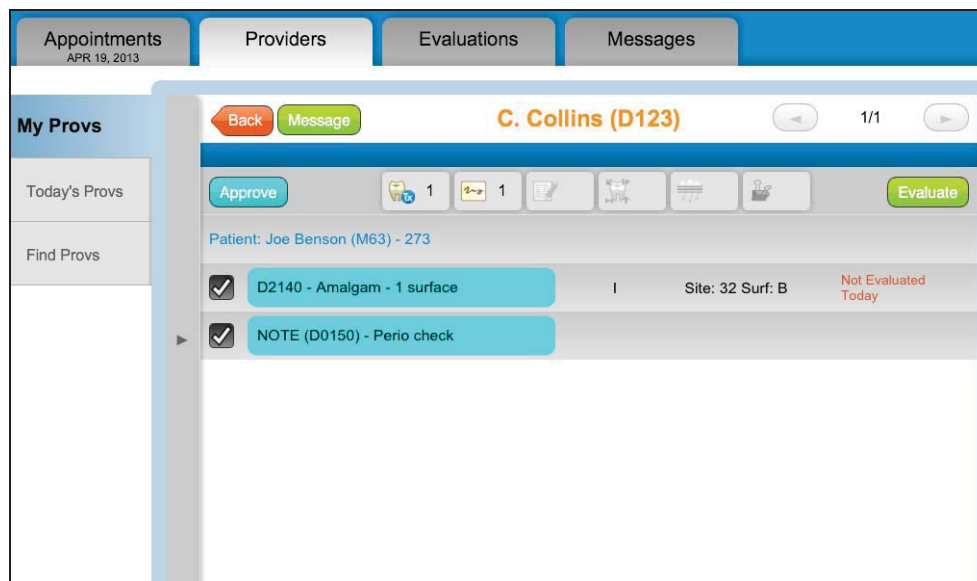
Exan FacultyAccess displays a list of providers that you have start checked today.

Exan FacultyAccess displays provider details and icons representing treatments, notes findings, periodontal charts and letters. The numbers next to these icons represent the number of unapproved items for that provider. Items approved today appear at the bottom of this list.



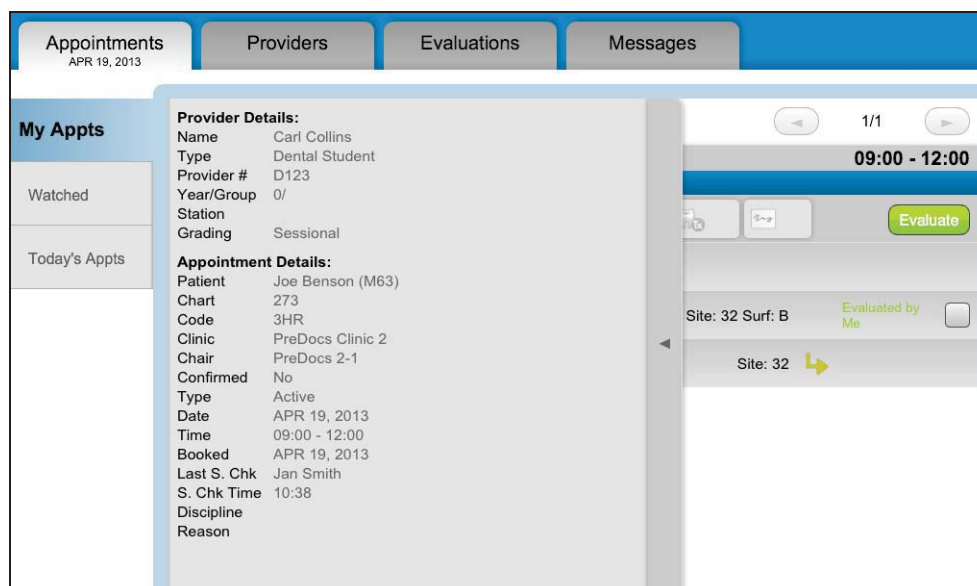
2. Tap a provider record.

Exan FacultyAccess displays the unapproved item details.



Items with a blue background require instructor approval.

You can find more provider and appointment details by selecting the sliding panel.



2.3 Searching Providers

On the Providers tab, there are two methods for searching providers:

- The Find Provs page

- The  (**Search Providers**) icon (My Provs page and Today's Provs page)

The difference between the two methods is that the Find Provider page enables you to search for providers that do not appear on My Providers page or Today's Providers page (i.e., to find providers who do not have chair reservations today).

▼To search for providers:

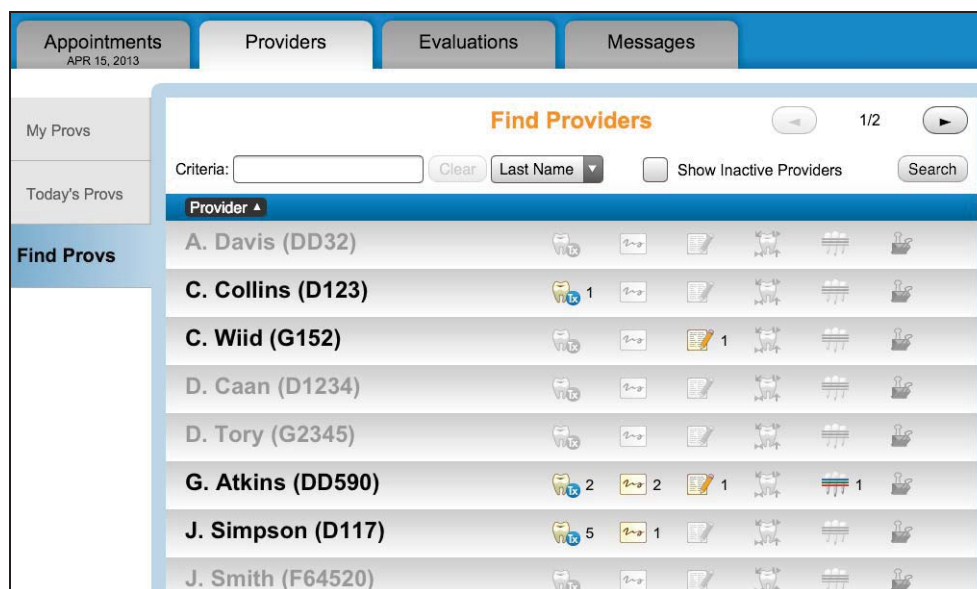
1. Go to the **Providers** tab, and tap **MyProvs/Today's Provs/Find Provs**.



A dialog box titled "Search Providers" with a blue header bar containing "Reset", "Cancel", and "OK" buttons. The form includes a "Keyword:" text input field, a "Search Type:" dropdown menu set to "Provider #", a "Provider Type:" dropdown menu set to "All", and a "Provider Group:" dropdown menu set to "All".

2. Tap **Find Provs**.

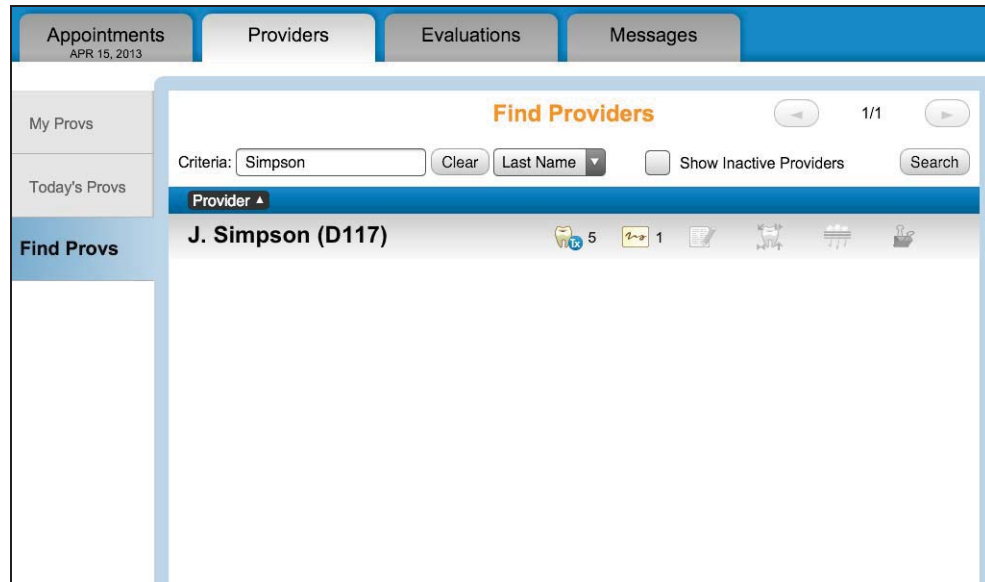
The Find Providers page is displayed.



The "Find Providers" page is shown with a blue header bar containing "Find Providers" and a "1/2" indicator. The page has a sidebar with tabs: "My Provs", "Today's Provs", and "Find Provs" (selected). The main content area has a "Criteria:" text input field, a "Clear" button, a "Last Name" dropdown menu, a "Show Inactive Providers" checkbox, and a "Search" button. Below the search criteria is a list of providers with their names and IDs, and a row of icons for each provider.

Provider	Icons
A. Davis (DD32)	[Icons]
C. Collins (D123)	[Icons]
C. Wiid (G152)	[Icons]
D. Caan (D1234)	[Icons]
D. Tory (G2345)	[Icons]
G. Atkins (DD590)	[Icons]
J. Simpson (D117)	[Icons]
J. Smith (F64520)	[Icons]

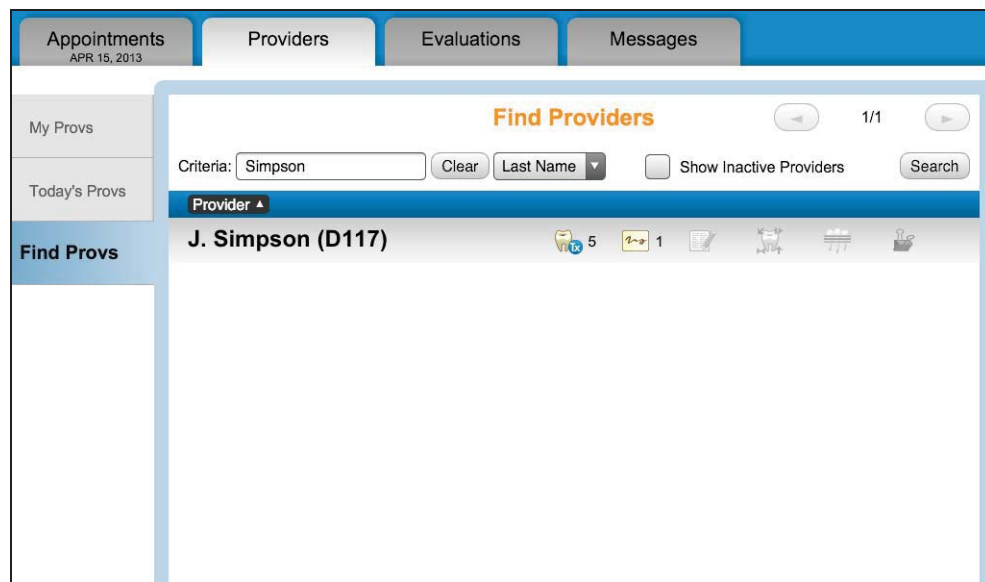
3. Tap the **Criteria** box, and using the on-screen keyboard, type an entry. For example, we will enter Simpson.
4. From the drop-down list, tap an option. For example, we will select Last Name.
5. Tap the **Search** button.



2.4 Clearing a Search on Providers

▼To clear a search on providers:

1. On the **Find Providers** page, tap the **Clear** button.



2. Tap **Search**.

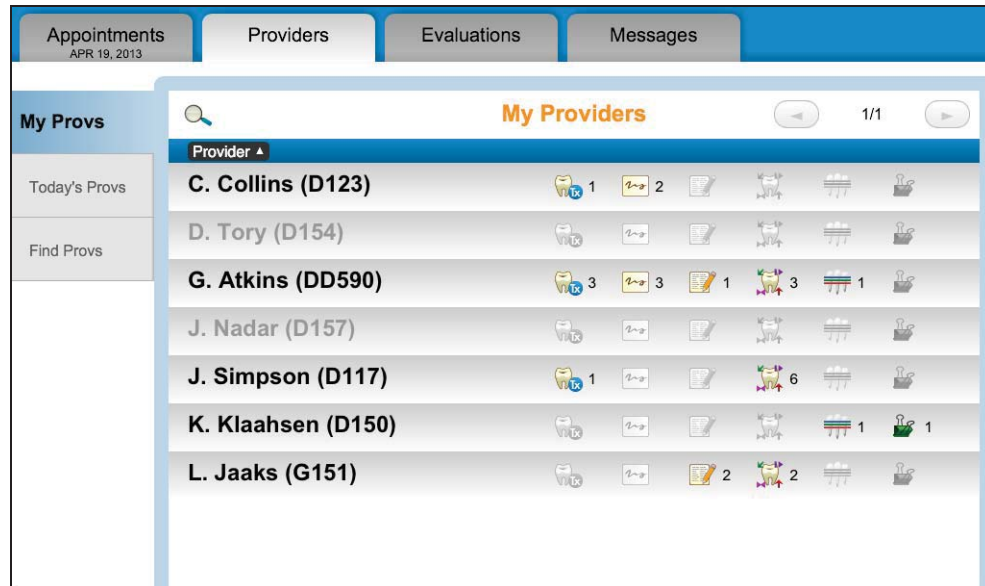
You are returned to the page that displays the providers for the selected clinic.

2.5 Approving Provider Treatments

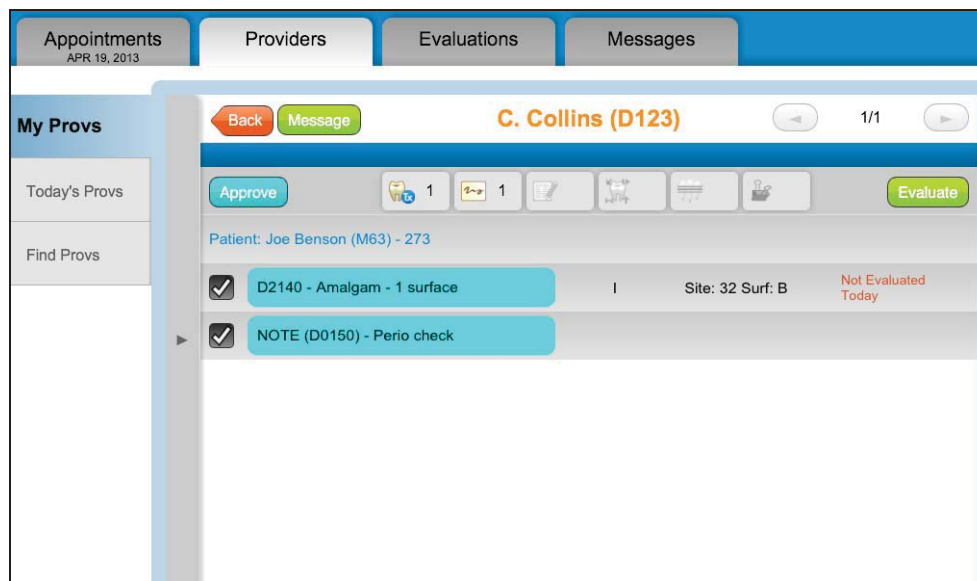
Provider details that you may approve include treatments, notes, EPR forms, clinical findings, periodontal charts, and letters.

▼To approve provider treatments:

1. Go to the **Providers** tab, and tap **My Provs/Today's Provs/Find Provs**.

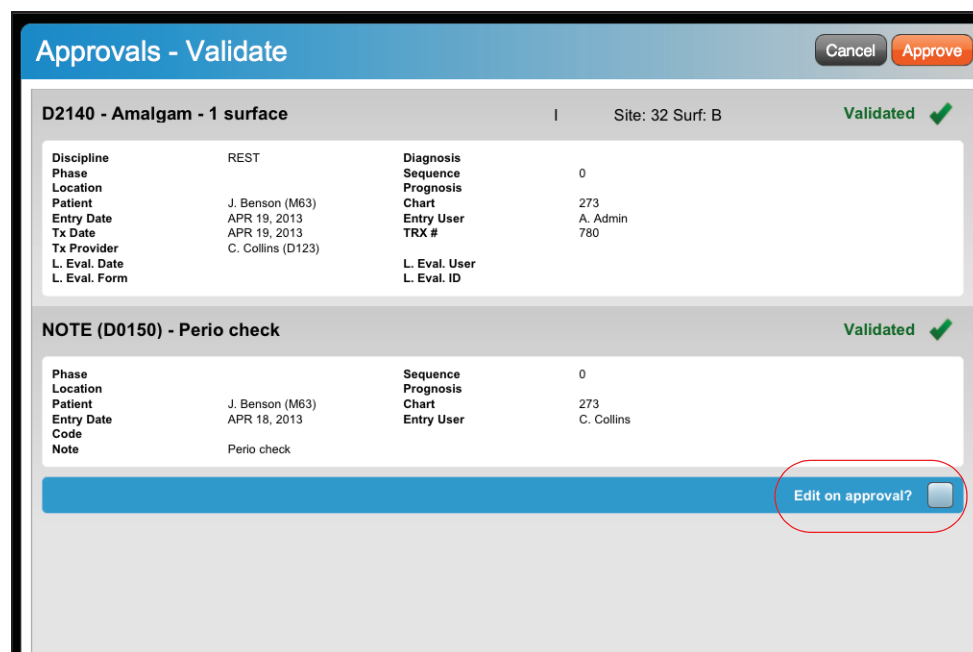


2. Tap a provider. For example, we will select C. Collins.
3. On the provider details page, tap a check box next to one or more unapproved procedures.



4. Tap **Approve**.

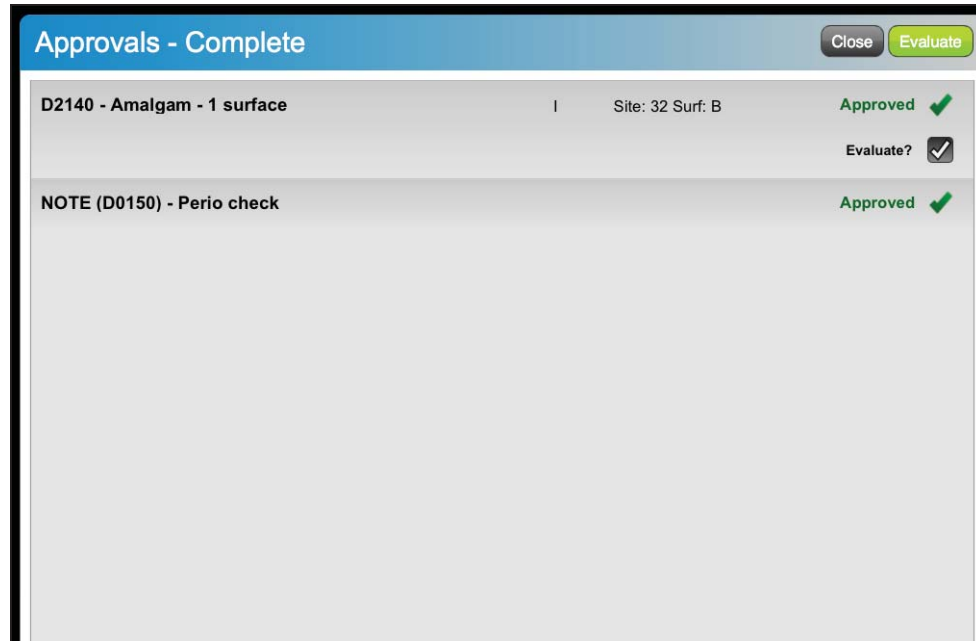
Exan FacultyAccess displays the Approvals - Validate page.



Here, you can edit notes associated with treatments that you are approving. For instructions on editing a note on the Approvals page, see *Editing an Unapproved Treatment Note* on page 31.

5. Tap **Approve**.

The Approvals - Complete page is displayed, listing all approved items.



6. Do one of the following:

- If you want to evaluate the procedure(s) now:
 - Ensure that the check box is checked next to any procedure(s) that you want to evaluate (check boxes are selected by default).
 - Tap **Evaluate**. For instructions on entering evaluations, see *Entering Evaluations* on page 57.
- If you do not want to evaluate the treatments now, tap **Close**. The Today's Provs page displays the green text 'Evaluated by Me' next to procedures that have been evaluated by you today.

3 Managing Evaluations

You can display evaluated and unevaluated treatments, and perform sessional or general evaluations.

This section covers the following topics:

- Displaying unevaluated treatments
- Entering evaluations
- Viewing completed evaluations
- Searching Evaluations

3.1 Displaying Unevaluated Treatments

▼To display unevaluated treatment records:

1. Go to the **Evaluations** tab, and tap the **Uneval Txs** tab.

Exan FacultyAccess displays a list of all unevaluated treatments by provider.

2. Tap a check box to the right of a treatment.

Procedure	Patient/Chart	Provider	Approved	
Provider: Carl Collins (D123)				
D2750 - Crown - PFM high noble metal	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
D2950 - Core buildup - including pins	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input checked="" type="checkbox"/>
D2952 - Cast post and core, w/ crown	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
D3330 - Endo therapy - molar	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>

3. Tap **Evaluate**.

The Evaluation form selection page is displayed.

For instructions on entering evaluations, see *Entering Evaluations* on page 57.

3.2 Entering Evaluations

After approving treatments and associated items, you can enter evaluations from the following areas:

- Appointments tab
- Providers tab
- Approvals - Complete page
- Evaluations tab

On the provider details page, the:

- Red text “Not Evaluated Today” next to a treatment indicates that the treatment requires grading, but has not been graded today.
- Green text “Evaluated by Me” next to a treatment indicates that you as the instructor graded the evaluation today one or more times.
- Gray text “Evaluated Today” next to a treatment indicates that another instructor graded the evaluation one or more times.
- Gray text “Not Evaluated Today” next to a treatment indicates that the provider does not require sessional or periodic grading.

As an instructor, you can enter a:

- Sessional evaluation where you perform an evaluation on the treatments performed by a provider.
- General evaluation that evaluates the provider rather than specific treatments.

Entering Sessional Evaluations

For this example, we will perform an evaluation from the Providers tab.

▼To enter a sessional evaluation:

1. Tap a provider that has one or more treatments that require(s) an evaluation.
2. Tap one or more of the check boxes next to treatments requiring an evaluation.

The Evaluation selection details page is displayed.

3. Tap an evaluation form in the right column, and tap **Continue**. For example, we will select the DCA form.

The Evaluation grading form appears.

4. Tap each of the **Grade** boxes, and using the Grading Scheme, select a grade.

5. When you have finished grading, tap **Submit**.

The completed DCA evaluation form has been placed in the right column of the Evaluation form selection page.

The screenshot shows the 'Evaluation' screen. At the top, there's a header with 'Evaluation' and a 'Close' button. Below the header, there are fields for 'Prov:' (K. Klaahsen (D150)) and 'Grd:' (Sessional). There are also tabs for 'New Evaluation', 'My Evaluations MAY 09, 2013', and 'Cumulative Evaluation'. A 'General Evaluation' checkbox is present. Below these are two tables. The left table lists evaluation items with checkboxes, patient names, chart numbers, transaction numbers, and evaluation status. The right table shows the selected form 'DCA' and its Grade ID '533'.

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	J. Benson (M63)	273	2	✓
<input checked="" type="checkbox"/>	D0120 - Periodic oral e...	D150	I	✓
<input checked="" type="checkbox"/>	D1204 - Fluoride, w/o p...	D150	I	✓

Form	Grade ID
DCA	533

6. Tap **Close**.

Exan FacultyAccess displays the message: Are you sure?

7. If you have completed evaluating, tap **Yes**.

Entering General Evaluations

This section describes entering a general evaluation from the Evaluations tab.

▼To enter a general evaluation:

1. Go to the **Providers** tab, and tap **My Provs**.

The My Providers page is displayed.

2. Tap a provider record, and then tap **Evaluate**.

The Evaluation form selection page is displayed with the General Evaluation check box selected.

Evaluation

Close

Prov: C. Collins (D123)

Grd: Sessional

☒ General Evaluation

No patients were chosen to evaluate.

New Evaluation

My Evaluations MAY 09, 2013

Cumulative Evaluation

Grading Discipline:

Continue

Form

DCA Daily Clinical Evaluation

DIAG Diagnostic Evaluation Form

3. Tap **Continue**.

The General Evaluation grading form appears.

General Evaluation - DCA

Back Submit

Prov: C. Collins

Inst: J. Smith

Time (hrs): 23

APR

2013

Competency

Discipline:

This form cannot be held.

Add/Edit Comment

Clear Grade

↑

↓

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	<div></div>	<div></div>
Preparedness	<div></div>	<div></div>
Technical Competence	<div></div>	<div></div>
Clinical Judgement	<div></div>	<div></div>
Patient Management	<div></div>	<div></div>

Grading Scheme

0 Fail

10 Poor

20 Pass

25 Solid Pass

30 Good

General Comment

4. Tap each of the **Grade** boxes, and using the **Grading Scheme**, tap a grade.

Prov: C. Collins

...

Time (hrs):

09

MAY

2013

Inst: J. Smith

Competency

Discipline:

Held For:

...

X

Add/Edit Comment

Clear Grade

↑

↓

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	30	J. Smith
Preparedness	30	J. Smith
Technical Competence	30	J. Smith
Clinical Judgement	30	J. Smith
Patient Management	30	J. Smith

Grading Scheme

0

Fail

10

Poor

20

Pass

25

Solid Pass

30

Good

General Comment

You can also add a general comment by tapping the  (General Comment) icon.

5. Tap **Submit**.

On the Evaluation selection details page, the completed DCA form is placed under the My Evaluations tab. In the example below, the general evaluation form has been assigned a Grade ID. This helps you to identify an evaluation form on the list of completed evaluations on the Evaluations page.

Evaluation

Close

Prov: C. Collins (D123)

Grd: Sessional

☒ General Evaluation

No patients were chosen to evaluate.

New Evaluation

My Evaluations MAY 09, 2013

Cumulative Evaluation

Edit

Form	Grade ID
DCA	529

6. Click the **Close** button.
- Exan FacultyAccess displays the message: Are you sure?
7. If you have completed evaluating, tap **Yes**.
8. Tap **Evaluations**.

The completed general evaluation is displayed on the Evaluations page.

Appointments MAY 09, 2013

Providers

Evaluations

Messages

Evaluations

Uneval Txs

Search

Edit

Resume

Delete

Evaluations

1/1

Form	ID/Type	Patient/Chart	Provider	Evaluated	Held
DCA	529 EVAL		C. Collins (D123)	J. Smith MAY 09, 2013	<input type="checkbox"/>

Holding Evaluation Forms

You can hold evaluations for any instructor or for a specific instructor. For this example, we will hold an evaluation form for a specific instructor.

▼To hold an evaluation form:

1. Create a new evaluation form.

For instructions on creating an evaluation form, see *Entering Evaluations* on page 57.

F. Albert (274) - DCA [Back] [Submit]

Prov: J. Simpson ... Time (hrs): 24 APR 2013 ☐ Held For: [Add/Edit Comment] [Clear Grade] [Up] [Down]

Inst: J. Smith ☐ Competency Discipline: [Dropdown]

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	25	J. Smith
Preparedness	30	J. Smith
Technical Competence	30	J. Smith
Clinical Judgement	30	J. Smith
Patient Management	30	J. Smith
D0150 - Comprehensive oral evaluation		
Tx Specific Grade	30	J. Smith
Technical Competence	10	J. Smith

Grading Scheme
There are no grading scheme items

General Comment [Add Comment]

2. Tap the **Held For** check box.

Exan FacultyAccess displays your name, by default, (i.e. the current instructor).

Indicates for whom this evaluation is held

F. Albert (274) - DCA Back Submit

Prov: J. Simpson ... Time (hrs): 24 APR 2013 ☒ **Held For:** J. Smith ... x

Inst: J. Smith ☐ Competency Discipline: ...

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	25	J. Smith
Preparedness	30	J. Smith
Technical Competence	30	J. Smith
Clinical Judgement	30	J. Smith
Patient Management	30	J. Smith
D0150 - Comprehensive oral evaluation		
Tx Specific Grade	30	J. Smith
Technical Competence	10	J. Smith

Grading Scheme

There are no grading scheme items

General Comment

Because we are holding this evaluation form for a specific instructor, we will change instructors.

3. Tap the **Held For** ... (ellipsis).

Exan FacultyAccess displays the Instructor List pop-up.

Instructor List [Cancel] [Select]

Criteria: First Name

Show: ☐ Deleted Users ☐ Expired Users 1/1

User	Logon	Last Name	First Name	Level	Provider #
1	axium	Admin	Axium	Administrator	
822	instructor	Smith	Jan	Faculty	F64520
1035	John	Smith	John	Faculty	F64510
782	wes	Monaghan	Wesley	Faculty	F537

4. Enter a name in the **Criteria** box, and tap **Search**.
5. Tap a record. For example, we will select instructor **Wesley Monaghan**.
6. Tap **Select**.

Exan FacultyAccess selects the highlighted instructor record, closes the Instructor List page, and returns to the evaluation grading form.

F. Albert (274) - DCA [Back] [Submit]

Prov: J. Simpson Time (hrs): 24 APR 2013 Held For: W. Monaghan

Inst: J. Smith Competency Discipline:

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	25	J. Smith
Preparedness	30	J. Smith
Technical Competence		
Clinical Judgement		
Patient Management	30	J. Smith
D0150 - Comprehensive oral evaluation		
Tx Specific Grade	30	J. Smith
Technical Competence	10	J. Smith

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment

7. Tap the **Submit** button.

Exan FacultyAccess submits the form.

Evaluation Close

Prov: J. Simpson (D117) ...

Grd: ☐ Sessional ☐ General Evaluation

New Evaluation My Evaluations APR 24, 2013 Cumulative Evaluation Continue

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	F. Albert (M63)	274	2	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	D0150 - Comprehensive...	D117	I	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	D2330 - Resin-based c...	D117	I 28	<input checked="" type="checkbox"/>

Form	Date	Grade ID
DCA	APR 24, 2013	459

If you go to the Evaluations page, the Held column is populated. Now, the instructor, for whom the evaluation form is held, can resume grading on the evaluation form. In the example below, the evaluation form is being held for Wesley Monaghan.

Evaluations 1/1


Edit Resume Delete

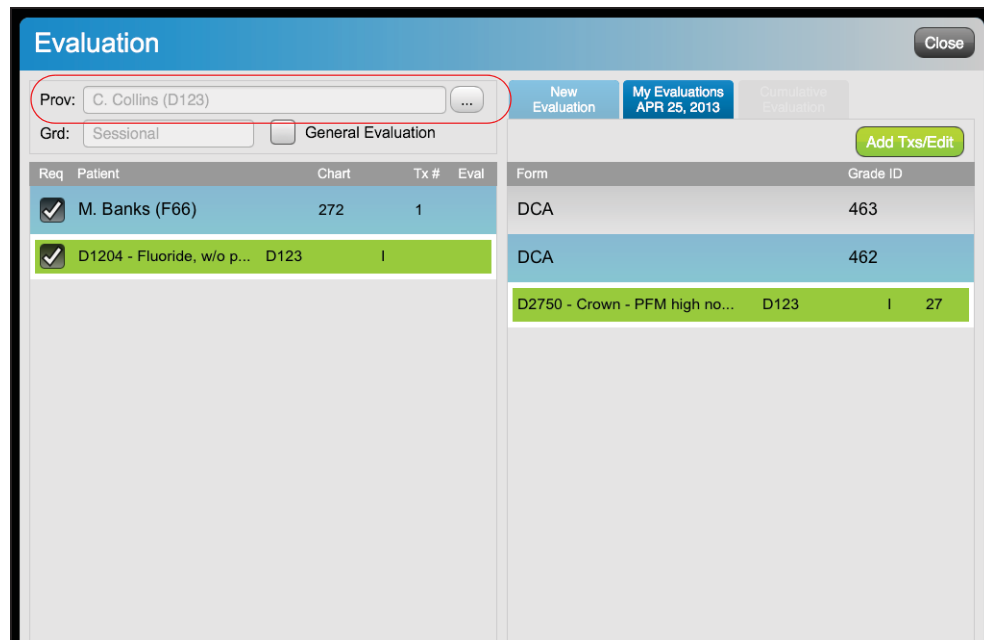
Form	ID/Type	Patient/Chart	Provider	Evaluated	Held
DCA	459 EVAL	F. Albert 274 (M63)	J. Simpson (D117)	J. Smith APR 24, 2013	Yes W. Monaghan <input type="checkbox"/>

Changing Provider After Entering a New Evaluation


After you have completed a new evaluation for the primary provider of an appointment, you can change to a different provider to perform a second evaluation on the same appointment treatment(s).

▼To change provider when entering a new evaluation:

1. On the **Evaluation** form selection page, tap the  (**ellipsis**) next to the **Prov:** box.



Evaluation Close

Prov: C. Collins (D123) 

Grd: Sessional ☒ General Evaluation

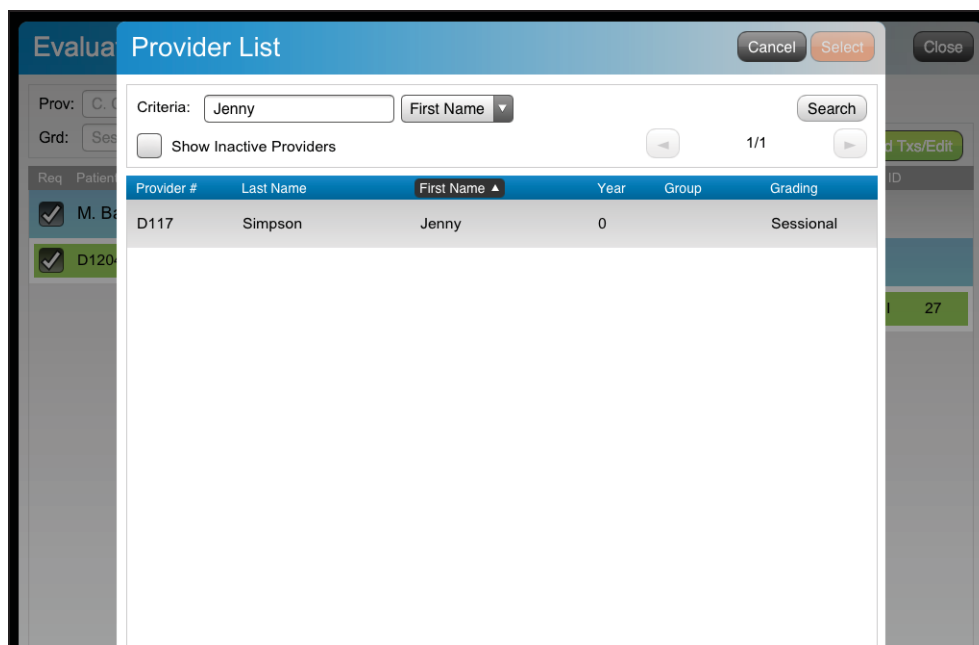
Add Tx/Edit

Req	Patient	Chart	Tx #	Eval	Form	Grade ID
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1		DCA	463
<input checked="" type="checkbox"/>	D1204 - Fluoride, w/o p...	D123	I		DCA	462
					D2750 - Crown - PFM high no...	D123 I 27

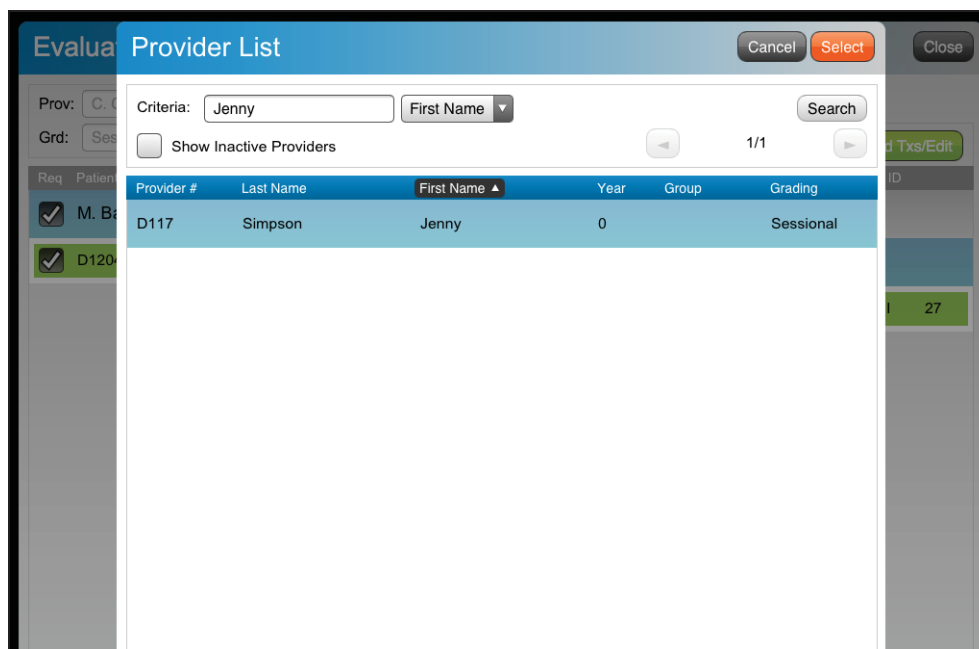
A list of providers is displayed.

2. Type a provider name in the **Criteria** box, and tap **Search**. For example, we will enter Jenny.

The search results are returned.



3. Tap the required provider record to highlight it.



4. Tap Select.

The second provider is now displayed in the Prov: box. In our example, provider J. (Jenny) Simpson is now displayed in the Prov: box.

5. Continue to evaluate the provider.

Entering Cumulative Evaluations

A cumulative evaluation refers to treatments that are evaluated multiple times. This is when a faculty member must continue marking the original cumulative form. Procedures are set up for cumulative evaluations in axiUm.

▼To enter a cumulative evaluation form:

1. Go to the **Evaluations** tab, and tap **Uneval Txs**.

Exan FacultyAccess displays all unevaluated treatments for today.

2. Tap a check box next to a treatment record that requires a cumulative evaluation.

Procedure	Patient/Chart	Provider	Approved
Provider: Carl Collins (D123)			
D1204 - Fluoride, w/o prophylaxis - adult	M. Banks 272 (F66)	C. Collins (D123)	J. Smith APR 25, 2013 <input checked="" type="checkbox"/>
D2750 - Crown - PFM high noble metal	M. Banks 272 (F66)	C. Collins (D123)	J. Smith APR 25, 2013 <input checked="" type="checkbox"/>
Provider: Jenny Simpson (D117)			
D2140 - Amalgam - 1 surface	F. Albert 274 (M63)	J. Simpson (D117)	J. Smith APR 25, 2013 <input type="checkbox"/>

3. Tap **Evaluate**.

Exan FacultyAccess displays the Evaluation form selection page.

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	M. Banks (F66)	272	2	
<input checked="" type="checkbox"/>	D1204 - Fluoride, w/o p...	D123	I	
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123	I	27

4. Ensure that the **New Evaluation** tab is selected.
5. Tap an evaluation form that is cumulative. For example, we will select the DCA form.
6. Tap **Continue** to display the evaluation form.

7. Tap each of the **Grade** boxes, and enter a grade. Alternatively, you can use the Grading Scheme to select a grade.

J. Benson (273) - DCA [Back] [Submit]

Prov: C. Collins ... Time (hrs): 23 APR 2013
 Inst: J. Smith ☐ Competency Discipline: [v]

This form cannot be held. [Add/Edit Comment] [Clear Grade] [↑] [↓]

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	30	J. Smith
Preparedness	30	J. Smith
Technical Competence	30	J. Smith
Clinical Judgement	30	J. Smith
Patient Management	30	J. Smith

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment [Add Comment]

8. After you have finished entering grades, tap **Submit**.

After you have submitted this form, Exan FacultyAccess adds this form to the record in the Cumulative Evaluation tab. In this example, Exan FacultyAccess has assigned the DCA evaluation form with the ID 462.

Evaluation [Close]

Prov: C. Collins (D123) ...
 Grd: Sessional ☐ General Evaluation

[New Evaluation] [My Evaluations APR 25, 2013] [Cumulative Evaluation] [Continue]

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1	✓
<input type="checkbox"/>	D1204 - Fluoride, w/o p...	D123	I	
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123	I 27	✓

Form	Date	Grade ID
DCA	APR 25, 2013	462

9. Tap the evaluation form that you have just completed.

Evaluation

Close

Prov: C. Collins (D123)
Grd: Sessional
☐ General Evaluation

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	D1204 - Fluoride, w/o p...	D123	I	
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123	I 27	<input checked="" type="checkbox"/>

New Evaluation
My Evaluations APR 25, 2013
Cumulative Evaluation

Continue

Form	Date	Grade ID
DCA	APR 25, 2013	462

Instructor: J. Smith
Provider: C. Collins (D123)
Held: No
Discipline: None

10. Tap **Continue** to perform another evaluation on the same treatment.

11. Enter grades on the **Evaluation** grading form.

12. Tap **Submit**.

A second evaluation form is added to the evaluation form list. Our example shows DCA 463 has been added to the list of completed forms,

Evaluation

Close

Prov: C. Collins (D123)
Grd: Sessional
☐ General Evaluation

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	D1204 - Fluoride, w/o p...	D123	I	
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123	I 27	<input checked="" type="checkbox"/>

New Evaluation
My Evaluations APR 25, 2013
Cumulative Evaluation

Continue

Form	Date	Grade ID
DCA	APR 25, 2013	463
DCA	APR 25, 2013	462

You can continue evaluating, using multiple copies of the same form.

13. Tap **Close** to finish evaluating.

Exan FacultyAccess displays the message: “Are you sure”.

14. Tap **Yes**.

Exan FacultyAccess closes the Evaluation form selection page.

Viewing Details and Reusing Answers on Cumulative Evaluation Forms

On a cumulative evaluation form, you can view who was evaluated on other cumulative forms. When you view the details of a cumulative evaluation, Exan FacultyAccess displays details such as:

- The name of the instructor who performed the evaluation
- The provider’s name
- The procedure
- The date of the evaluation
- The Grade ID of the evaluation form
- The grade

▼To view details and to reuse answers on a cumulative evaluation form:

1. On the **Evaluation** details form, tap one of the cumulative evaluations.

The screenshot shows the 'Evaluation' details form. At the top, there's a header 'Evaluation' with a 'Close' button. Below the header, there are fields for 'Prov: J. Simpson (D117)' and 'Grd: Sessional'. There are also tabs for 'New Evaluation', 'My Evaluations MAY 03, 2013', and 'Cumulative Evaluation'. A 'Continue' button is visible. Below the tabs, there's a table with columns: Req, Patient, Chart, Tx #, Eval, Form, Date, and Grade ID. The table contains two rows of data. The first row is for 'M. Banks (F66)' with Chart 272, Tx # 1, and Eval status '✓'. The second row is for 'D2750 - Crown - PFM h...' with Chart D123, Tx # 25, and Eval status '✓'. Below the table, there's a section for 'Instructor: J. Smith', 'Provider: C. Collins (D123)', 'Held: No', and 'Discipline: None'.

Req	Patient	Chart	Tx #	Eval	Form	Date	Grade ID
✓	M. Banks (F66)	272	1	✓	DCA	MAY 03, 2013	525
✓	D2750 - Crown - PFM h...	D123	25	✓	DCA	MAY 03, 2013	524

Instructor: J. Smith
 Provider: C. Collins (D123)
 Held: No
 Discipline: None

In this example, we will reuse answers entered on previous cumulative forms.

2. Select an existing cumulative evaluation, and tap **Continue**.

The grading form is displayed. In the example below, there are two evaluation forms for two different providers. The warning indicates that the provider on the graded form differs from the provider selected on the Prov box. If you select Yes, the provider on the selected evaluation form will be selected on the grading form.

Evaluation Close

Prov: J. Simpson (D117) ... New Evaluation My Evaluations MAY 03, 2013 Cumulative Evaluation Continue

Grd: Sessional ☐ General Evaluation

Req	Patient	Chart	Tx #	Eval	Form	Date	Grade ID
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1	<input checked="" type="checkbox"/>	DCA	MAY 03, 2013	525
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123				MAY 03, 2013	524

Exan FacultyAccess

The selected provider is different than the provider that was evaluated on this cumulative evaluation. If you continue, the provider that was evaluated on the cumulative evaluation will be selected by default on the evaluation form. Continue?

Yes No

3. Tap **Yes**.

M. Banks (272) - DCA Back Submit

Prov: C. Collins ... Time (hrs): MAY 03, 2013 ☐ Held For: ... X

Inst: J. Smith Comp: No Discipline: ...

Add/Edit Comment Clear Grade ↑ ↓

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	<input type="text" value="30"/>	J. Smith
Preparedness	<input type="text" value="30"/>	J. Smith
Technical Competence	<input type="text" value="30"/>	J. Smith
Clinical Judgement	<input type="text" value="30"/>	J. Smith
Patient Management	<input type="text" value="30"/>	J. Smith
D2750 - Crown - PFM high noble metal	<input type="text" value="25"/>	J. Smith
Tx Specific Grade	<input type="text" value="25"/>	J. Smith

Insert

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment ...

4. Go to the specific treatment question, and tap the **Insert** button.

A summary of the previous answers for the specific treatment question is displayed. The specific treatment question pop-up below shows two previous answers on the cumulative form.

DCA - D2750 [Cancel] [Select]

Instructor	Provider	Date	Grade ID
J. Smith	J. Simpson (D117)	MAY 03, 2013	525
J. Smith	C. Collins (D123)	MAY 03, 2013	524

The background interface shows the 'M. Banks (272) - DCA' form with fields for Prov: C. Collins, Inst: J. Smith, Time (hrs):, MAY 03, 2013, Held For:, and buttons for Back, Submit, Add/Edit Comment, Clear Grade, and navigation arrows. The main table lists evaluation categories: Daily Clinical Evaluation, Independence, Preparedness, Technical Competence, Clinical Judgement, and Patient Management. The bottom section shows 'D2750 - Crown - PFM high noble metal' with a grade of 25 and 'Tx Specific Grade' with a grade of 25, both by J. Smith.

5. Tap one of the previous answers to see the details.
6. Tap **Select** to use the previous answer.

M. Banks (272) - DCA [Back] [Submit]

Prov: C. Collins ... Time (hrs): MAY 03, 2013 Held For: [Add/Edit Comment] [Clear Grade] [Up Arrow] [Down Arrow]

Inst: J. Smith Comp: No Discipline: [Dropdown]

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	[Input]	[Icon]
Preparedness	[Input]	[Icon]
Technical Competence	[Input]	[Icon]
Clinical Judgement	[Input]	[Icon]
Patient Management	[Input]	[Icon]

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment [Icon]

D2750 - Crown - PFM high noble metal I 25 [Insert]

Tx Specific Grade 30 [Icon] J. Smith

7. When you have finished grading, tap **Submit**.

Evaluation

Close

Prov: C. Collins (D123)

Grd: Sessional

General Evaluation

New Evaluation

My Evaluations MAY 03, 2013

Cumulative Evaluation

Continue

Req	Patient	Chart	Tx #	Eval	Form	Date	Grade ID
<input checked="" type="checkbox"/>	M. Banks (F66)	272	1	✓	DCA	MAY 03, 2013	526
<input checked="" type="checkbox"/>	D2750 - Crown - PFM h...	D123	I 25	✓	DCA	MAY 03, 2013	525
					DCA	MAY 03, 2013	524

Adding Treatments to Existing Evaluations

As a provider completes treatments for a patient, you can add these treatments to the same evaluation form. For example, a provider has performed several procedures on a patient. You have already evaluated one procedure and will add another procedure to the same evaluation.

▼To add a treatment to an existing evaluation:

- 1. On the **Approvals - Complete** page, choose **Evaluate**.

Approvals - Complete

Close

Evaluate

D2140 - Amalgam - 1 surface

I

Site: 27 Surf: I

Approved

Evaluate? ☒

Exan FacultyAccess displays the Evaluation form selection page.

Evaluation

Close

Prov: K. Klaahsen (D150)

Grd: Sessional

☐ General Evaluation

New Evaluation

My Evaluations MAY 09, 2013

Cumulative Evaluation

Add Tx/Edit

Req	Patient	Chart	Tx #	Eval	Form	Grade ID
<input checked="" type="checkbox"/>	M. Cifali (F63)	278	1		DCA	536
<input checked="" type="checkbox"/>	D2140 - Amalgam - 1 s...	D150	I	27		

The My Evaluations tab displays a list of existing grade forms that you entered.

- In the **My Evaluations** tab, tap an existing grade form to which you want to add the procedure. For example, we will select DCA, Grade ID 536.

Evaluation Close

Prov: K. Klaahsen (D150) ...

Grd: Sessional General Evaluation

New Evaluation **My Evaluations** MAY 09, 2013 Cumulative Evaluation Add Tx/Edit

Req	Patient	Chart	Tx #	Eval	Form	Grade ID
<input checked="" type="checkbox"/>	M. Cifali (F63)	278	1		DCA	536
<input checked="" type="checkbox"/>	D2140 - Amalgam - 1 s...	D150	I	27	D0120 - Periodic oral evaluati...	D150

- Tap **Add Tx/Edit**.

The evaluation form is displayed.

- Enter the grades for the added treatment.

M. Cifali (278) - DCA Back Submit

Prov: K. Klaahsen ... Time (hrs): 0 09 MAY 2013

Inst: J. Smith ... Competency Discipline: ...

Not Held Add/Edit Comment Clear Grade ↑ ↓

Question/Comment	Grade	User
Daily Clinical Evaluation		
Independence	25	J. Smith
Preparedness	25	J. Smith
Technical Competence	25	J. Smith
Clinical Judgement	25	J. Smith
Patient Management	25	J. Smith
D0120 - Periodic oral evaluation		
Tx Specific Grade	30	J. Smith
Technical Competence	10	J. Smith

Grading Scheme

0	Fail
10	Poor
20	Pass
25	Solid Pass
30	Good

General Comment ...

5. Tap **Submit**.

Exan FacultyAccess appends the selected treatment to the associated evaluation form.

The screenshot shows the 'Evaluation' form. At the top, there's a header with 'Evaluation' and a 'Close' button. Below the header, there are fields for 'Prov: K. Klaahsen (D150)' and 'Grd: Sessional'. There's also a 'General Evaluation' checkbox. On the right, there are tabs for 'New Evaluation', 'My Evaluations MAY 09, 2013', and 'Cumulative Evaluation'. A green 'Add Tx/Edit' button is also present. The main area is divided into two tables. The left table has columns: Req, Patient, Chart, Tx #, and Eval. It shows a row for 'M. Cifali (F63)' with Chart 278, Tx # 1, and a green checkmark. Below it, a row for 'D2140 - Amalgam - 1 s...' is partially visible. The right table has columns: Form and Grade ID. It shows a row for 'DCA' with Grade ID 537. Below it, two rows for 'D0120 - Periodic oral evaluati...' and 'D2140 - Amalgam - 1 surface' are visible, both with Grade ID 537.

Req	Patient	Chart	Tx #	Eval
<input checked="" type="checkbox"/>	M. Cifali (F63)	278	1	✓
	D2140 - Amalgam - 1 s...	D150	I	27

Form	Grade ID
DCA	537
D0120 - Periodic oral evaluati...	D150 I
D2140 - Amalgam - 1 surface	D150 I 27

3.3 Viewing Completed Evaluations

After you have completed evaluations, you can:

- Edit an evaluation
- Resume grading an evaluation
- Delete an evaluation

▼ To display a graded evaluation form:

1. Go to the **Evaluations** tab, and tap **Evaluations**.

Exan FacultyAccess displays a list of all evaluation forms entered today.

The screenshot shows the 'Evaluations' tab in a mobile application. At the top, there are four tabs: 'Appointments', 'Providers', 'Evaluations', and 'Messages'. Below these, there is a search bar and three buttons: 'Edit', 'Resume', and 'Delete'. The main content area displays a list of evaluations. The first evaluation is highlighted in blue and has a checkmark in the 'Held' column. The other evaluations are in a light gray background and have empty checkboxes in the 'Held' column.

Form	ID/Type	Patient/Chart	Provider	Evaluated	Held
DCA	458 EVAL	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input checked="" type="checkbox"/>
Time(hrs): 0 Discipline:					
D2952 - Cast post and core, w/ crown*				I	
D3330 - Endo therapy - molar*				I 15	
DCA	456 EVAL	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
DCA	455 EVAL	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
DCA	453 EVAL	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
DCA	452 EVAL	J. Benson 273 (M63)	C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>
DCA	449 EVAL		C. Collins (D123)	J. Smith APR 23, 2013	<input type="checkbox"/>

3. Tap **Edit** to display the evaluation grading form.
4. Make your changes.
5. Tap **Submit** to save the changes.
6. Tap **Close**.

Resuming Held Evaluation Forms

▼To resume a held evaluation form:

1. Go to the **Evaluations** tab, and tap **Evaluations**.

Exan FacultyAccess displays the selected evaluation form. You can now continue grading this form.

Deleting Evaluations

You can delete a submitted evaluation form.

▼To delete an evaluation form:

1. Go to the **Evaluations** tab, and tap **Evaluations**.

Exan FacultyAccess displays a list of evaluation forms entered today.

2. Tap the check box next to the evaluation.
3. Tap **Delete**.

Exan FacultyAccess displays the message pop-up: “Are you sure? You are about to delete 1 evaluation(s)”.

4. Tap **Yes** to delete the selected evaluation form.

3.4 Searching Evaluations

This section covers the following topics:


- Searching Evaluated treatments
- Searching Unevaluated treatments

Searching Evaluated Treatments

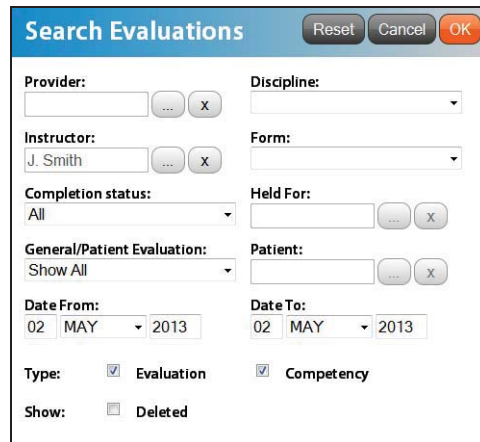
You can perform a search on evaluations for all providers, or for a specific provider and/or for a specific instructor to display a list of:

- Completed or held evaluations
- General or patient evaluations
- Evaluation forms by discipline
- Evaluation form type (such as a DCA form)

▼To search for evaluations:

1. Go to the **Evaluations** page, and tap the  (**Search**) icon.

The Search Evaluations pop-up appears.



The 'Search Evaluations' pop-up form has a blue header with the title 'Search Evaluations' and three buttons: 'Reset', 'Cancel', and 'OK'. The form contains several fields and checkboxes:

- Provider:** A text input field with an ellipsis button and an 'X' button.
- Discipline:** A dropdown menu.
- Instructor:** A text input field with 'J. Smith' entered, an ellipsis button, and an 'X' button.
- Form:** A dropdown menu.
- Completion status:** A dropdown menu with 'All' selected.
- Held For:** A text input field with an ellipsis button and an 'X' button.
- General/Patient Evaluation:** A dropdown menu with 'Show All' selected.
- Patient:** A text input field with an ellipsis button and an 'X' button.
- Date From:** A date picker showing '02 MAY 2013'.
- Date To:** A date picker showing '02 MAY 2013'.
- Type:** Two checkboxes: 'Evaluation' (checked) and 'Competency' (checked).
- Show:** A checkbox for 'Deleted' (unchecked).

2. On the **Search Evaluations** pop-up, use the:

2.1. Drop-down lists to make your selections.


2.2.  (**ellipsis**) to select from a list, choose **Search**, and then choose **Select**.

3. Choose **OK**.

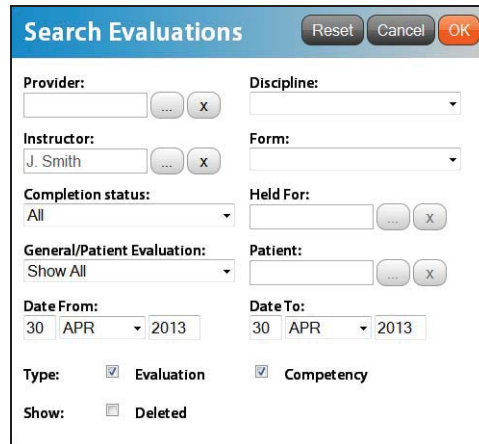
The Search results are returned on the Evaluations page.

Searching General Evaluations

▼To Search General Evaluations:

1. On the **Evaluations** page, tap the  (**Search Evaluations**) icon.

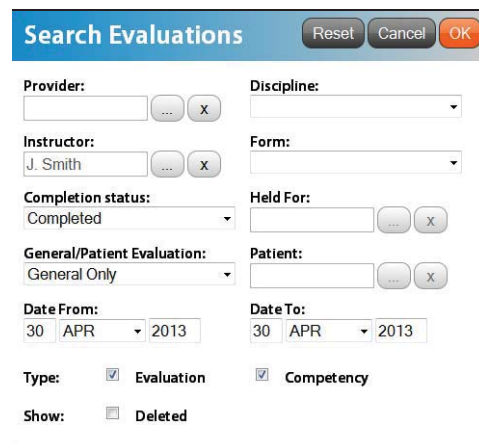
The Search Evaluations pop-up appears.



The 'Search Evaluations' dialog box features a blue header with 'Reset', 'Cancel', and 'OK' buttons. It contains several search criteria sections: 'Provider' and 'Instructor' (text inputs with dropdown arrows and 'X' buttons), 'Discipline' and 'Form' (dropdown menus), 'Completion status' (dropdown menu), 'Held For' (text input with dropdown arrow and 'X' button), 'General/Patient Evaluation' (dropdown menu), 'Patient' (text input with dropdown arrow and 'X' button), 'Date From' and 'Date To' (date pickers), and 'Type' (checkboxes for 'Evaluation' and 'Competency'). A 'Show:' section at the bottom has a checkbox for 'Deleted'.

For this example, we will display a list of all completed general evaluations for the day.

2. From the **Completion status** drop-down list, select **Completed**.
3. From the **General/Patient Evaluation** drop-down list, select **General Only**.



This screenshot shows the 'Search Evaluations' dialog box with the following changes: 'Completion status' is set to 'Completed' and 'General/Patient Evaluation' is set to 'General Only'. All other fields remain the same as in the previous screenshot.


4. Tap **OK**.

A list of completed general evaluations is displayed.

Evaluations						
Evaluations						
Form	ID/Type	Patient/Chart	Provider	Evaluated	Held	
DIAG	498 EVAL		S. Rhabb (G153)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	497 EVAL		M. Johnston (DD78)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	495 EVAL		K. Klaahsen (D150)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	494 EVAL		J. Nadar (D157)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	493 EVAL		G. Atkins (DD590)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	492 EVAL		D. Tory (D154)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	491 EVAL		C. Collins (D123)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	490 EVAL		L. Jaaks (G151)	J. Smith APR 30, 2013		<input type="checkbox"/>
DCA	489 EVAL		J. Simpson (D117)	J. Smith APR 30, 2013		<input type="checkbox"/>

Searching Held Evaluations

▼To Search for Held Evaluations:

1. On the **Evaluations** page, tap the  (**Search**) icon.

The Search Evaluations pop-up appears.

Search Evaluations

Reset Cancel OK

Provider:

...

X

Discipline:

Instructor:

J. Smith

...

X

Form:

Completion status:

All

Held For:

...

X

General/Patient Evaluation:

Show All

Patient:

...

X

Date From:

02 MAY 2013

Date To:

02 MAY 2013

Type:

☒ Evaluation

☒ Competency


Show:

☐ Deleted

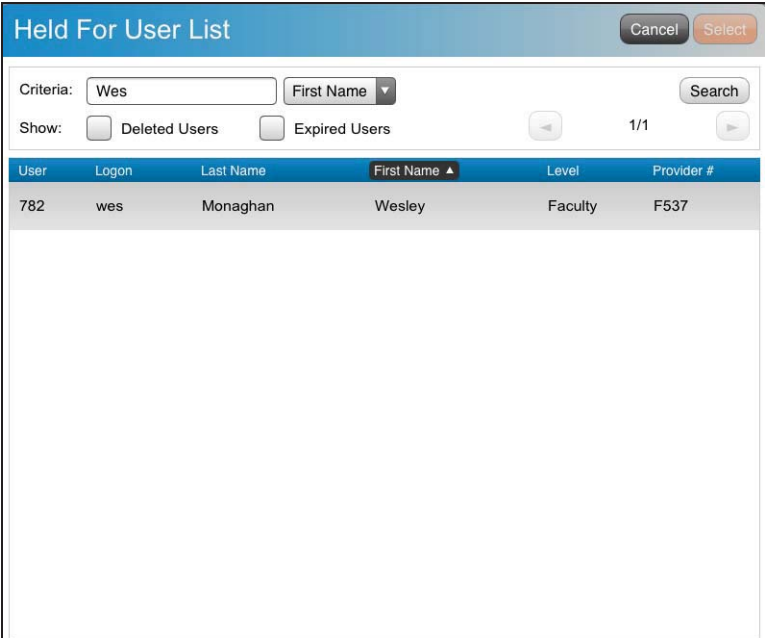
For this example, we will search for held evaluations for the day for instructor Wes Monaghan.

2. From the **Completed status** drop-down list, select **Held**.

3. From the **Held For** area:

- 3.1. Select the  (ellipsis),
- 3.2. Type a first name in the **Criteria** box, ensuring that the adjacent drop-down list displays **First Name**. For example, we will type *Wes*.
- 3.3. Tap **Search**.

The details of the instructor is displayed.



User	Logon	Last Name	First Name	Level	Provider #
782	wes	Monaghan	Wesley	Faculty	F537

- 3.4. Tap the instructor record to highlight the record.

User	Logon	Last Name	First Name	Level	Provider #
782	wes	Monaghan	Wesley	Faculty	F537

- 3.5. Tap **Select**.

Provider: [Text Input] ... x Discipline: [Dropdown]

Instructor: [Text Input: J. Smith] ... x Form: [Dropdown]

Completion status: [Dropdown: Held] Held For: [Text Input: W. Monaghan] ... x

General/Patient Evaluation: [Dropdown: Show All] Patient: [Text Input] ... x

Date From: [Date Picker: 02 MAY 2013] Date To: [Date Picker: 02 MAY 2013]

Type: ☒ Evaluation ☒ Competency

Show: ☐ Deleted

4. From the **General/Patient Evaluations** drop-down list, ensure that **Show All** is selected.
5. Tap **OK**.

The example below shows that instructor Wes Monaghan has one held evaluation form.

Appointments

MAY 02, 2013

Providers

Evaluations

Messages

Evaluations

Edit

Resume

Delete

Evaluations

1/1


Form	ID/Type	Patient/Chart	Provider	Evaluated	Held
DCA	511 EVAL	M. Banks 272 (F66)	C. Collins (D123)	J. Smith MAY 02, 2013	Yes W. Monaghan

Uneval Tx

You can clear this evaluation search to view the previous list of evaluations.

Clearing Evaluation Search Results

▼To clear evaluation search results:

1. On the **Evaluations** results page, tap the  (**Search**) icon.

The Search Evaluations pop-up appears. This example shows a general evaluation search.

Search Evaluations

Reset Cancel OK

Provider:

...

X

Discipline:

Instructor:

J. Smith

...

X

Form:

Completion status:

Completed

Held For:

...

X

General/Patient Evaluation:

General Only

Patient:

...

X

Date From:

30 APR 2013

Date To:

30 APR 2013

Type:

☒ Evaluation

☒ Competency

Show:

☐ Deleted

2. Tap **Reset** to clear the search results.
3. Tap **OK**.

Searching Unevaluated Treatments

You can search by provider, instructor, or patient for an approved date or treatment date.

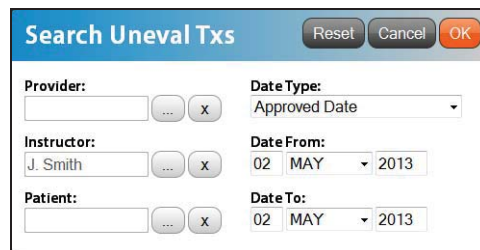
If you search by:

- Provider, you can choose to show inactive providers.
- Instructor, you can show deleted and expired users.

▼To search unevaluated treatments:

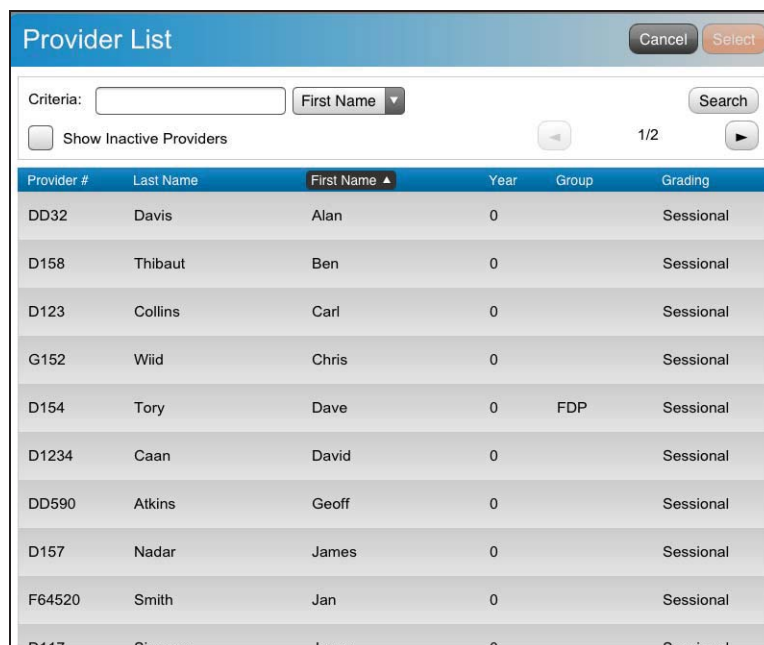
1. Go to **Uneval Txs**, and tap the  (**Search**) icon.

The Search Uneval Txs pop-up is displayed.



The image shows a 'Search Uneval Txs' pop-up window. It has a title bar with 'Reset', 'Cancel', and 'OK' buttons. Below the title bar, there are three sections: 'Provider:', 'Instructor:', and 'Patient:'. Each section has a text input field, an ellipsis button, and an 'x' button. To the right of these sections, there are date selection fields: 'Date Type:' with a dropdown menu set to 'Approved Date', 'Date From:' with a date picker set to '02 MAY 2013', and 'Date To:' with a date picker set to '02 MAY 2013'.

2. Tap the **Provider**  (**ellipsis**) to display the Provider List.



The image shows a 'Provider List' screen. It has a title bar with 'Cancel' and 'Select' buttons. Below the title bar, there is a search criteria section with a text input field, a dropdown menu set to 'First Name', and a 'Search' button. Below this, there is a checkbox labeled 'Show Inactive Providers' and a pagination indicator '1/2' with left and right arrow buttons. The main part of the screen is a table with the following columns: 'Provider #', 'Last Name', 'First Name', 'Year', 'Group', and 'Grading'. The table contains 10 rows of data.

Provider #	Last Name	First Name	Year	Group	Grading
DD32	Davis	Alan	0		Sessional
D158	Thibaut	Ben	0		Sessional
D123	Collins	Carl	0		Sessional
G152	Wiid	Chris	0		Sessional
D154	Tory	Dave	0	FDP	Sessional
D1234	Caan	David	0		Sessional
DD590	Atkins	Geoff	0		Sessional
D157	Nadar	James	0		Sessional
F64520	Smith	Jan	0		Sessional
D117	Simpson	Jenny	0		Sessional

3. Tap a provider record.

Provider List Cancel Select

Criteria: First Name ▾ Search

☐ Show Inactive Providers 1/2

Provider #	Last Name	First Name ▲	Year	Group	Grading
DD32	Davis	Alan	0		Sessional
D158	Thibaut	Ben	0		Sessional
D123	Collins	Carl	0		Sessional
G152	Wiid	Chris	0		Sessional
D154	Tory	Dave	0	FDP	Sessional
D1234	Caan	David	0		Sessional
DD590	Atkins	Geoff	0		Sessional
D157	Nadar	James	0		Sessional
F64520	Smith	Jan	0		Sessional
D117	Simpson	Joey	0		Sessional

4. Tap Select.

Search Uneval Tx Reset Cancel OK

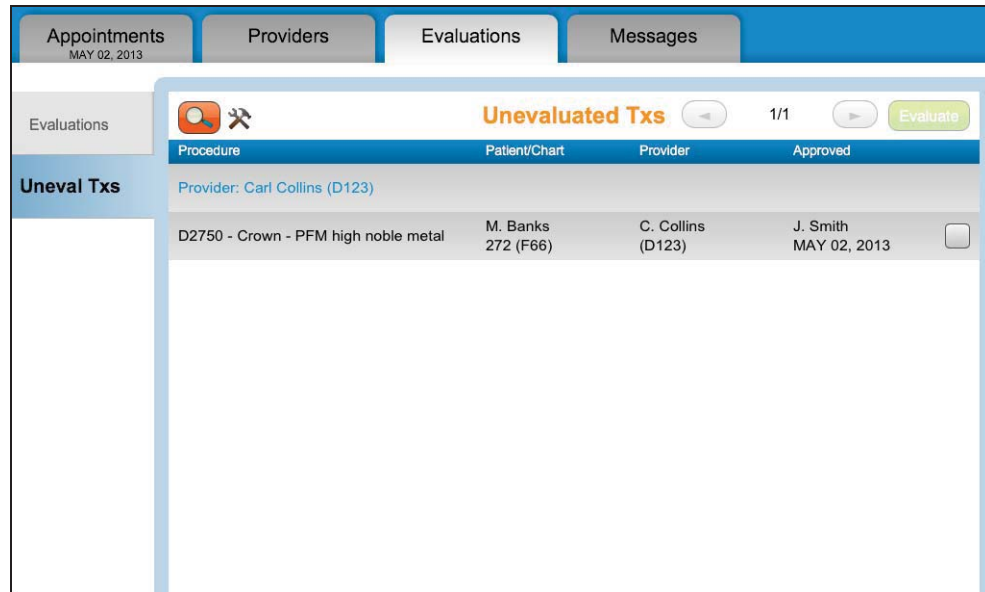
Provider: ... x Date Type: Approved Date ▾

Instructor: ... x Date From: 02 MAY ▾ 2013

Patient: ... x Date To: 02 MAY ▾ 2013

5. From the **Date Type:** drop-down list, choose either **Approved Date** or **Treatment Date**. For this example, we will choose **Approved Date** and the default dates.
6. Choose **OK**.

The Search results are returned on the Unevaluated Tx page.



You can clear the evaluation search criteria to view the previous list of evaluations.

Clearing Unevaluated Tx Search Results

▼To clear unevaluated treatment results:

1. On the **Unevaluated Tx** results page, tap the  (**Search**) icon.

The Search Uneval Tx pop-up is displayed.

2. Tap **Reset** to clear the search results.
3. Tap **OK**.

4 Managing Messages

This section covers the following topics:

- Composing messages
- Viewing messages
- Forwarding messages
- Reply/Reply All to messages
- Viewing sent messages
- Moving messages to custom folders
- Deleting messages

4.1 Composing Messages

You can compose a message to:

- A patient
- axiUm users
- A group

Composing a Message to a Patient

When you compose a message, you can select only one patient recipient per message.

▼ **To compose a message to a patient:**

1. On the **Messages** page, tap the **Compose** button.

2. Tap the **Recipients** button to display the Recipients pop-up.

Name	Provider Group	Provider ID
Jan Smith		
Gary Bennett		
John Smith		
Wesley Monaghan		
Anna Brown		F804
Axium Admin		
Jason Shui		D174
Chris Wiid		D157
David Caan		D151
Karina Palister		

Send	Name	Provider Group	Type
There are no recipients			



Alternatively, you can tap inside the To or Cc boxes.

3. From the **Search by** drop-down list, select **Patient**. In our example, the recipient will be patient Jane Doe.

The screenshot shows a 'Recipients' dialog box with a search interface. The 'Search by' dropdown is set to 'Patient'. Below it, a list of patients is displayed, with names in green text and chart numbers in grey. The right pane shows a 'Recipients' table with columns 'Send', 'Name', 'Provider Group', and 'Type', but it is currently empty, displaying 'There are no recipients'.

Search by Patient	
Name	Chart #
Adam McCarthy	281
Andrew Lee	268
Angela Fu	294
Audrey Shu	287
Barbara Fairfax	267
Ben Hanson	276
Carl Collins	299
Carly Johnson	273
Cathy Peters	285
David Levers	286

Recipients			
Send	Name	Provider Group	Type
There are no recipients			

4. If the patient is not displayed in the left pane:
 - 4.1. From the drop-down list, select **First Name**, **Last Name**, or **Chart**. For example, we will select Last Name.
 - 4.2. Tap inside the **Criteria** box, and enter the search criteria. For example, we will enter the first letter or letters of the patient's surname and select Last Name from the drop-down list. For example, we will enter 'd'.
 - 4.3. Tap the **Search** button.

Patients who meet the above criteria are displayed in green text.

Recipients Cancel Done

Search by Patient Last Name

Criteria d Search Reset

To Cc Bcc Add Remove

Search by Patient

Name	Chart #
Jane Doe	258
John Doe	256
Mary Doe	257
Mike Doe	262

Recipients

Send	Name	Provider Group	Type
There are no recipients			

FIRST PREV 1 of 1 NEXT LAST FIRST PREV 1 of 1 NEXT LAST

5. Tap **To** or **Cc**, depending on how you want the patient to receive the message.



Patients cannot be entered in the Bcc box.

6. In the **Search by Patient** list, tap the recipient's name.

Recipients

Cancel Done

Search by Patient Last Name

Criteria d Search Reset

Search by Patient

Name	Chart #
Jane Doe	258
John Doe	256
Mary Doe	257
Mike Doe	262

To Cc Bcc

Add Remove

Recipients

Send	Name	Provider Group	Type
There are no recipients			

FIRST PREV 1 of 1 NEXT LAST

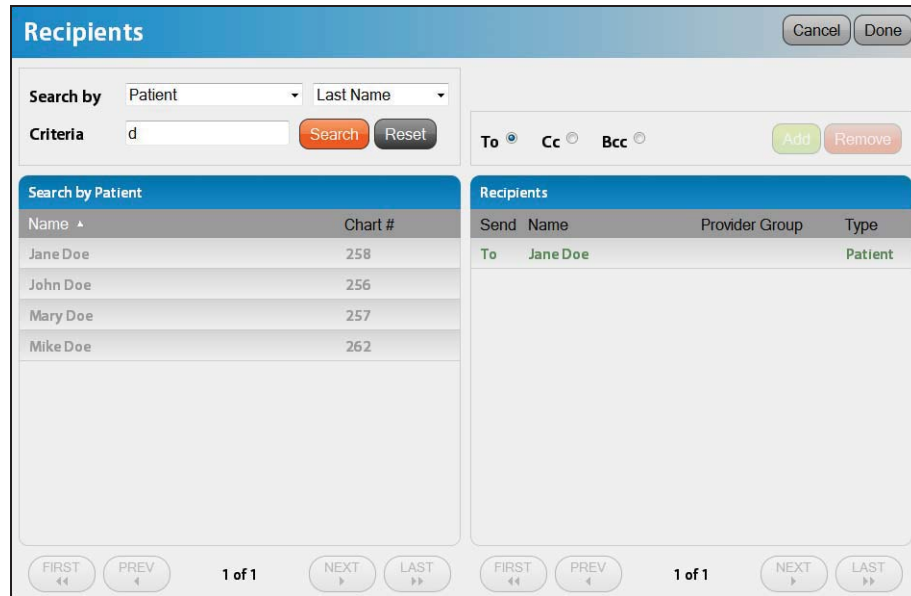
FIRST PREV 1 of 1 NEXT LAST



Clicking the Name title or the Chart # title in the Search by Patient pane enables you to switch between ascending or descending name order or to sort chart numbers numerically.

7. Tap the **Add** button to add the name to the Recipients list.

The recipient's name is in green text in the right pane. In the left pane, patient names are gray to indicate that they cannot be selected.



The 'Recipients' screen has a blue header with 'Recipients' and 'Cancel'/'Done' buttons. It features a search section with 'Search by' (Patient), 'Last Name' dropdown, and a 'Criteria' field with 'd' and 'Search'/'Reset' buttons. Below is a 'Search by Patient' table with columns 'Name' and 'Chart #':

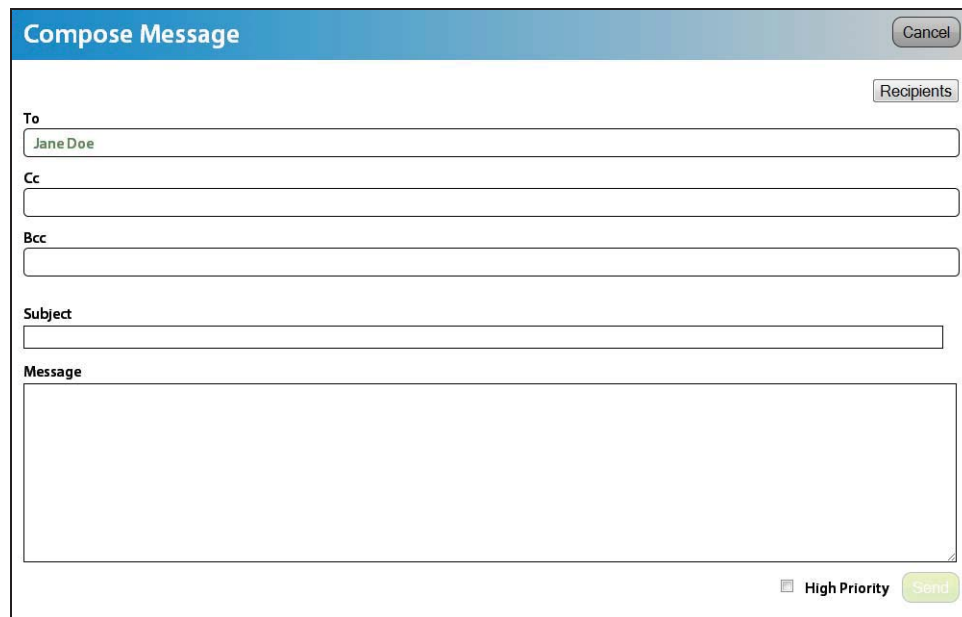
Name	Chart #
Jane Doe	258
John Doe	256
Mary Doe	257
Mike Doe	262

At the bottom of the search section are 'FIRST', 'PREV', '1 of 1', 'NEXT', and 'LAST' buttons. To the right is a 'Recipients' list with columns 'Send', 'Name', 'Provider Group', and 'Type'. It shows one entry: 'To Jane Doe Patient'. Above this list are 'To', 'Cc', and 'Bcc' radio buttons, and 'Add'/'Remove' buttons. At the bottom of the list are 'FIRST', 'PREV', '1 of 1', 'NEXT', and 'LAST' buttons.



To remove a patient from the Recipients list, click the patient's name, and click the Remove button.

8. Tap the **Done** button.



The 'Compose Message' screen has a blue header with 'Compose Message' and a 'Cancel' button. It includes a 'Recipients' button in the top right. The form has fields for 'To' (containing 'JaneDoe'), 'Cc', 'Bcc', and 'Subject'. Below these is a large 'Message' text area. At the bottom right, there is a 'High Priority' checkbox and a 'Send' button.

9. In the **Subject** box, enter the subject of the message.



There is a limit of 50 characters applied to the Subject box.

10. In the **Message** box, enter the message.



There is a limit of 32000 characters applied to the Message box.

11. If the message is urgent, tap the **High Priority** check box.
12. Tap the **Send** button.

Composing a Message to an axiUm User

▼To compose a message to an axiUm user:

1. Go to the **Messages** tab, and tap the **Compose** button.

The Compose Message page is displayed.

Compose Message Cancel

Recipients

To

Cc

Bcc

Subject

Message

☐ High Priority Send

2. Tap the **Recipients** button to display the Recipients pop-up.

Recipients

CancelDone

Search byUserFirst Name

CriteriaSearchReset

Recent Users

Name	Provider Group	Provider ID
Jan Smith		
Gary Bennett		
John Smith		
Wesley Monaghan		
Anna Brown		F804
Axium Admin		
Jason Shui		D174
Chris Wiid		D157
David Caan		D151
Karina Palister		

FIRSTPREV1 of 1NEXTLAST

ToCcBccAddRemove

Recipients

Send	Name	Provider Group	Type
There are no recipients			

FIRSTPREV1 of 1NEXTLAST



Alternatively, you can tap inside the To box.

3. If the axiUm user is not displayed in the **Recent Users** list:

- 3.1. From the drop-down list, select **First Name**, **Last Name**, or **Chart**. For example, we will select First Name.
- 3.2. Tap inside the **Criteria** box, and enter the search criteria. In our example, we will enter the first letter 'j' to search for provider Jenny Simpson.
- 3.3. Tap the **Search** button.

Recipients [Cancel] [Done]

Search by: User First Name

Criteria: j [Search] [Reset]

To: [To] [Cc] [Bcc] [Add] [Remove]

Search by User		
Name	Provider Group	Provider ID
Jan Smith		
Jason Shui		D174
Jenny Simpson		D154
Jerry Simons		D167
John Smith		

Recipients			
Send	Name	Provider Group	Type
There are no recipients			

[FIRST] [PREV] 1 of 1 [NEXT] [LAST] [FIRST] [PREV] 1 of 1 [NEXT] [LAST]

4. Tap **To**, **Cc**, or **Bcc**, depending on how you want the user to receive the message.
5. In the **Search by User** list, tap the recipient's name.

Recipients [Cancel] [Done]

Search by: User First Name
Criteria: j [Search] [Reset]

Search by User

Name	Provider Group	Provider ID
Jan Smith		
John Smith		
Jenny Simpson		D154
Jerry Simons		D167
Jason Shui		D174

Recipients

Send	Name	Provider Group	Type
There are no recipients			

[FIRST] [PREV] 1 of 1 [NEXT] [LAST] [FIRST] [PREV] 1 of 1 [NEXT] [LAST]



Clicking the Name header, the Provider Group header, or the Provider ID header switches between ascending or descending order.

6. Tap the **Add** button to add the name to the Recipients list.

The recipient's name is in black text in the right pane. In the left pane, the recipient's name (Jenny Simpson) is grayed-out to indicate that it cannot be selected.

Recipients

Cancel

Done

Search by

User

First Name

Criteria

j

Search

Reset

Search by User

Name	Provider Group	Provider ID
Jan Smith		
John Smith		
Jenny Simpson		D154
Jerry Simons		D167
Jason Shui		D174

FIRST

PREV

1 of 1

NEXT

LAST

Recipients

Send	Name	Provider Group	Type
To	Jenny Simpson		User

FIRST

PREV

1 of 1

NEXT

LAST



To remove a user's name from the Recipients list, click the user's name, and click the Remove button.

- Tap the **Done** button.

Compose Message

Cancel

Recipients

To

Jenny Simpson

Cc

Bcc

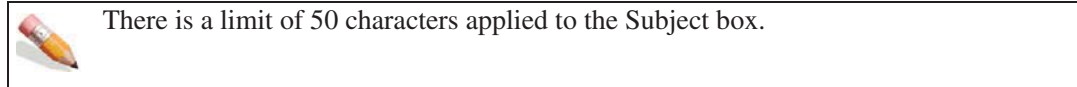
Subject

Message

High Priority

Send

8. In the **Subject** box, enter the subject of the message.



9. In the **Message** box, enter the message.



10. If the message is urgent, tap the **High Priority** check box.

A screenshot of the "Compose Message" form. The form has a blue header bar with the title "Compose Message" and a "Cancel" button. Below the header, there is a "Recipients" button. The form contains several input fields: "To" (with "PreDoc2" entered), "Cc", "Bcc", "Subject" (with "Clean Work Areas" entered), and "Message" (with "After each session, please make sure that you have cleaned up your work areas." entered). The "Message" field has a character count "(31922 remaining characters)". At the bottom right, there is a "High Priority" checkbox and a green "Send" button.

11. Tap the **Send** button.

Exan FacultyAccess sends the message.

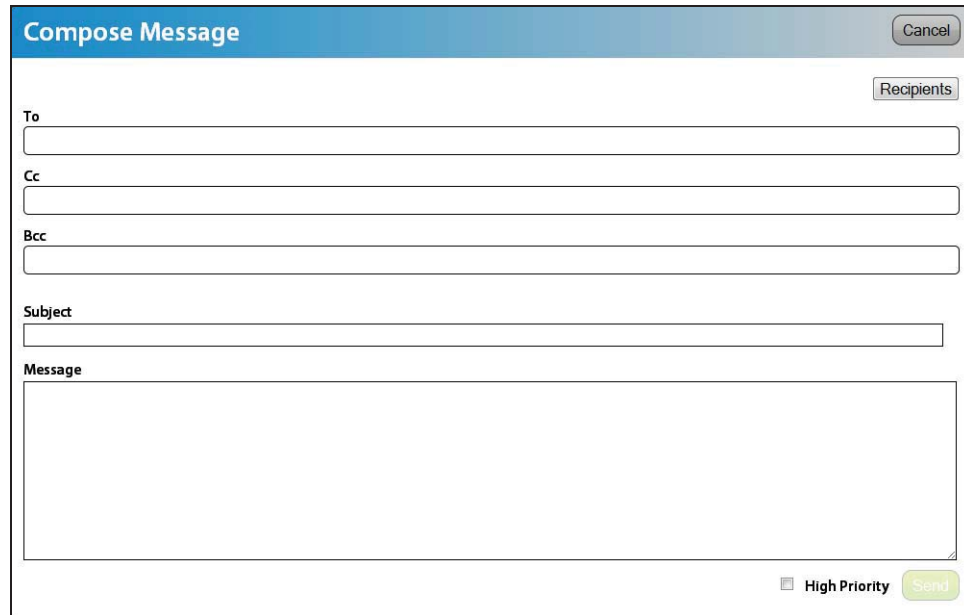
Composing a Message to Group

You can send a message to a group, for example, to all providers.

▼To compose a message to a group:

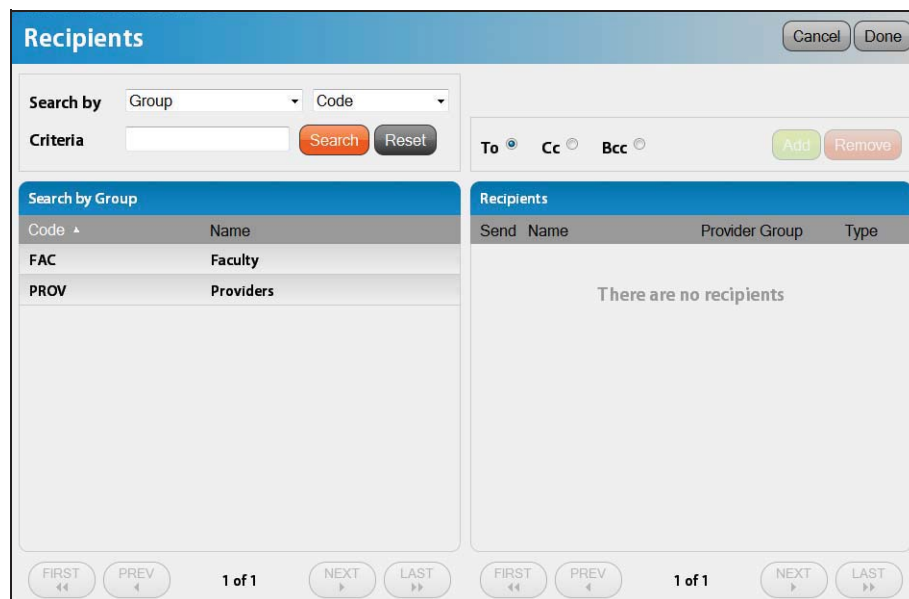
1. Go to the **Messages** tab, and tap the **Compose** button.

The Compose Message page is displayed.



The 'Compose Message' screen features a blue header with the title 'Compose Message' and a 'Cancel' button. Below the header are four input fields: 'To', 'Cc', 'Bcc', and 'Subject'. A 'Recipients' button is located to the right of the 'To' field. Below these fields is a large 'Message' text area. At the bottom right, there is a 'High Priority' checkbox and a green 'Send' button.

2. Tap the **Recipients** button to display the Recipients pop-up.



The 'Recipients' pop-up screen has a blue header with the title 'Recipients' and 'Cancel' and 'Done' buttons. It is divided into two main sections. The left section, titled 'Search by Group', contains a 'Search by' dropdown set to 'Group', a 'Code' dropdown, a 'Criteria' input field, and 'Search' and 'Reset' buttons. Below this is a table with two rows: 'FAC' for 'Faculty' and 'PROV' for 'Providers'. The right section, titled 'Recipients', has radio buttons for 'To' (selected), 'Cc', and 'Bcc', along with 'Add' and 'Remove' buttons. Below these is a table with columns 'Send', 'Name', 'Provider Group', and 'Type'. The table is currently empty, displaying the message 'There are no recipients'. At the bottom, there are navigation buttons: 'FIRST', 'PREV', '1 of 1', 'NEXT', and 'LAST' for both the search and recipient lists.



Alternatively, you can tap inside the To box.

3. In the **Search by Group** list, tap the required recipient group.

Recipients

CancelDone

Search by

GroupCode

Criteria

SearchReset

Search by Group

Code	Name
FAC	Faculty
PRED2	PreDoc2
PREDOC	PreDoc1
PROV	Providers

ToCcBcc

AddRemove

Recipients

Send	Name	Provider Group	Type
There are no recipients			

FIRSTPREV1 of 1NEXTLAST

FIRSTPREV1 of 1NEXTLAST



Clicking the Code header or the Name header switches between ascending or descending order.

4. Tap the **Add** button to add the group to the **Recipients** list.

The recipient group's name is in black text in the right pane. In the left pane, the recipient group's name (PRED2) is grayed-out to indicate that it cannot be selected.

Recipients

Cancel Done

Search by

Group

Code

Criteria

Search

Reset

Search by Group

Code	Name
FAC	Faculty
PRED2	PreDoc2
PREDOC	PreDoc1
PROV	Providers

Recipients

Send	Name	Provider Group	Type
To	PreDoc2		Group

FIRST

PREV

1 of 1

NEXT

LAST

FIRST

PREV

1 of 1

NEXT

LAST



To remove a user's name from the Recipients list, click the user's name, and click the Remove button.

- Tap the **Done** button.

Compose Message

Cancel

Recipients

To

PreDoc2

Cc

Bcc

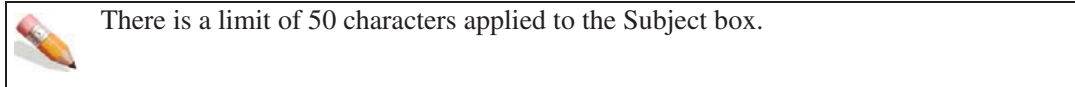
Subject

Message

High Priority

Send

6. In the **Subject** box, enter the subject of the message.



7. In the **Message** box, enter the message.



8. If the message is urgent, tap the **High Priority** check box to select it.

A screenshot of the "Compose Message" form. The form has a blue header bar with the title "Compose Message" and a "Cancel" button. Below the header, there is a "Recipients" button. The form contains several input fields: "To" (with "PreDoc2" entered), "Cc", "Bcc", "Subject" (with "Clean Work Areas" entered), and "Message" (with "After each session, please make sure that you have cleaned up your work areas." entered). The "Message" field has a character count "(31922 remaining characters)". At the bottom right, there is a "High Priority" checkbox and a green "Send" button.

9. Tap the **Send** button.

Exan FacultyAccess sends the message to all members of the group.

4.2 Replying/Replying All to Messages

▼To reply/reply all to a patient message:

1. Go to the **Message Details** page of a patient message.
2. Tap the **Reply/Reply All** button.

Compose Message Cancel

Recipients

To
Jane Doe

Cc
David Caan

Bcc

Subject
Re: Last Dental Appointment

Message

-----Original Message-----
Dear Dr Smith,

At my last dental appointment, you said that I should think about having orthodontic treatment. Could you please suggest an orthodontist/refer me to an orthodontist?

Thank you,

☐ High Priority Send

3. In the **Message** box, enter your message above the Original Message using the on-screen keyboard.

Compose Message Cancel

Recipients

To
Jane Doe

Cc
David Caan

Bcc

Subject
Re: Last Dental Appointment

Message (31629 remaining characters)

Dear Ms Doe,

I am referring you to a local orthodontist, which you will receive in the post shortly.

Regards,

Dr Smith

-----Original Message-----

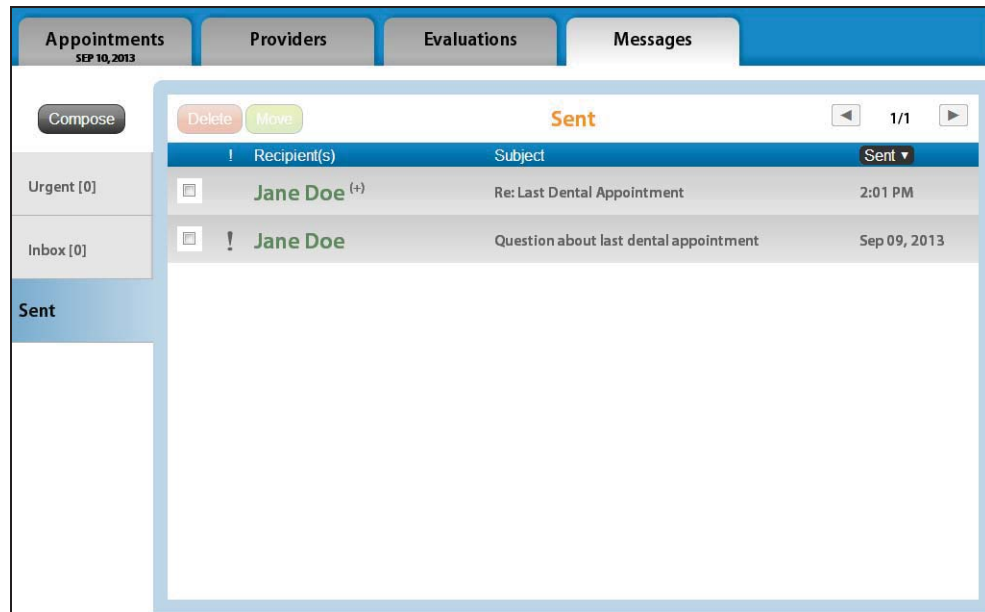
☐ High Priority Send

4. If the message is urgent, click the **High Priority** check box to select it.
5. Tap the **Send** button.

4.3 Forwarding Messages

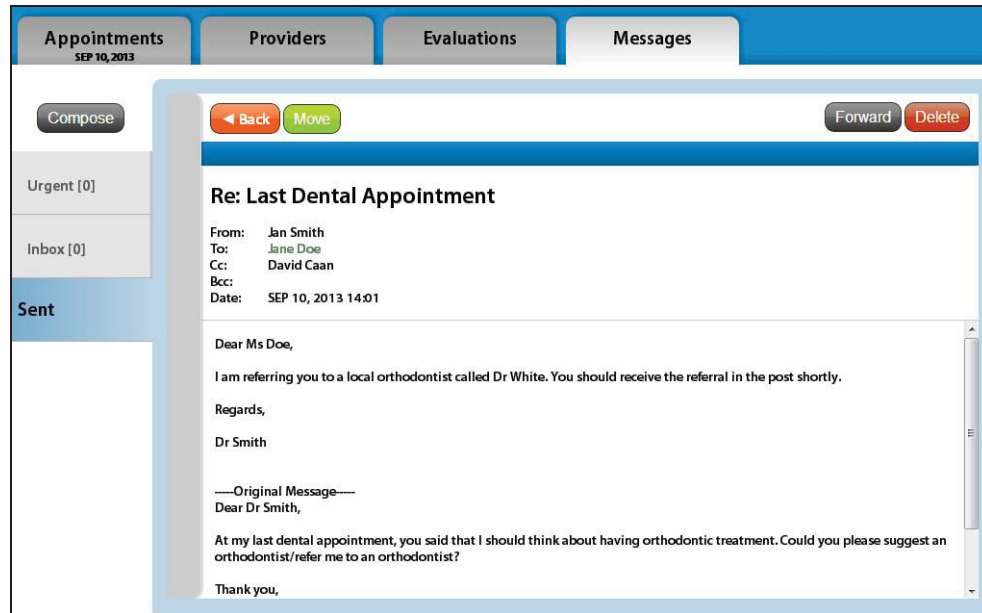
▼To forward a message:

1. Go to either the **Inbox** or **Sent** folder, and tap a patient message or a message that includes a patient (for example, a patient in the Cc box).



Names with a (+) sign indicate that there is more than one recipient.

2. In the **Message Details** page, tap the **Forward** button.




3. Enter recipient(s), and then enter a subject in the **Subject** box.
4. Enter a message above the original message.
5. Tap the **Send** button

4.4 Viewing Messages

Exan FacultyAccess notifies you when you have received an urgent or non-urgent message.

You may see these message alert icons on the right of your menu bar:  (urgent message)

and  (non-urgent message). A gray message alert icon shows the number of unread regular messages and a red e-mail alert icon shows the number of unread urgent messages.

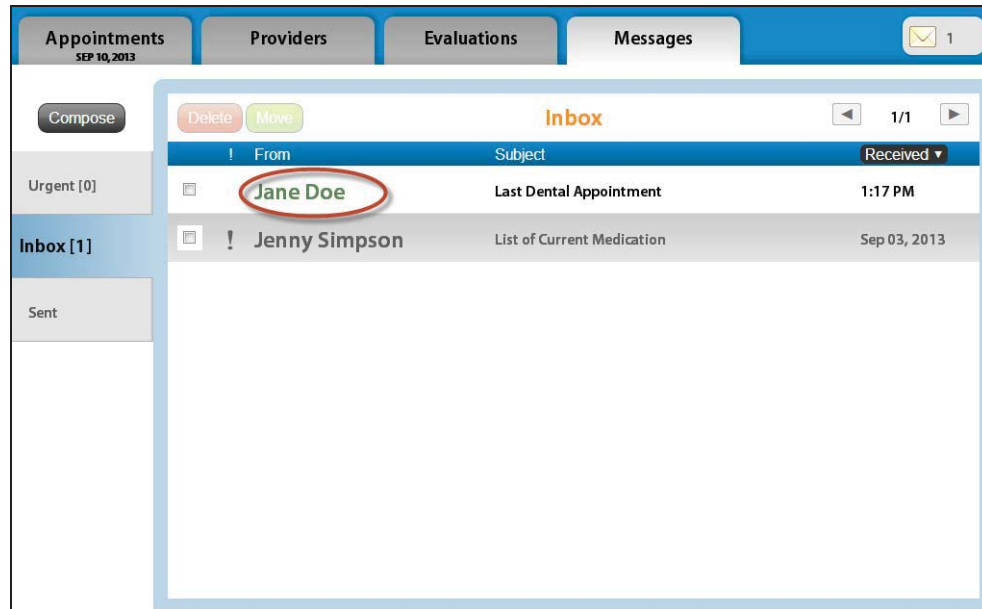
Viewing a Patient Message

Messages sent from Exan PatientAccess show the patient's name in green text to indicate that the sender is a patient.

If there is a (+) sign next to the name, there is more than one recipient in the message. If a patient is a recipient in a message, their name is always shown first.

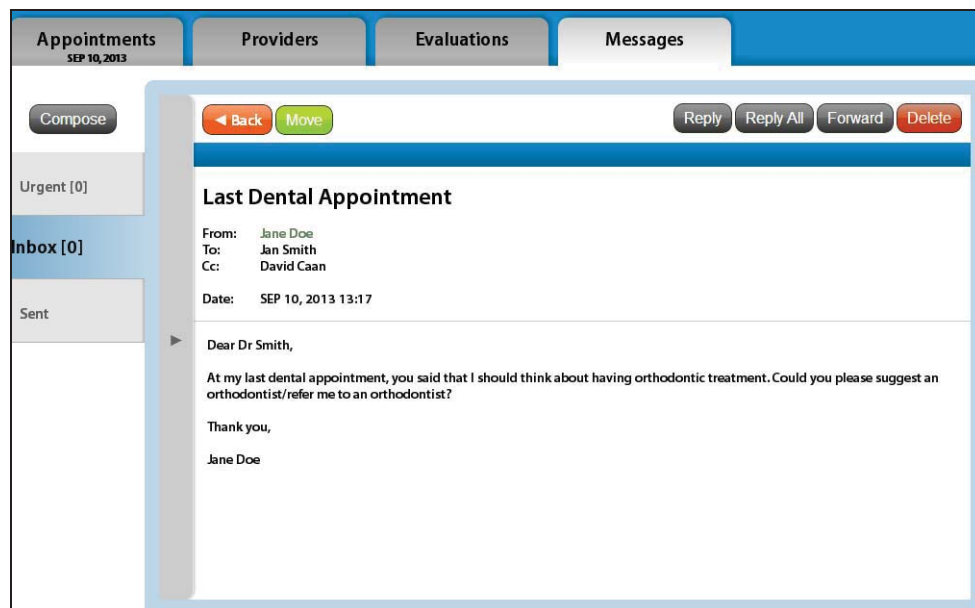
▼To view a patient message from the Inbox or Sent folder:

1. Go to the **Messages Inbox/Sent** folder.



2. Tap a message from a patient.

The Message Details page appears.

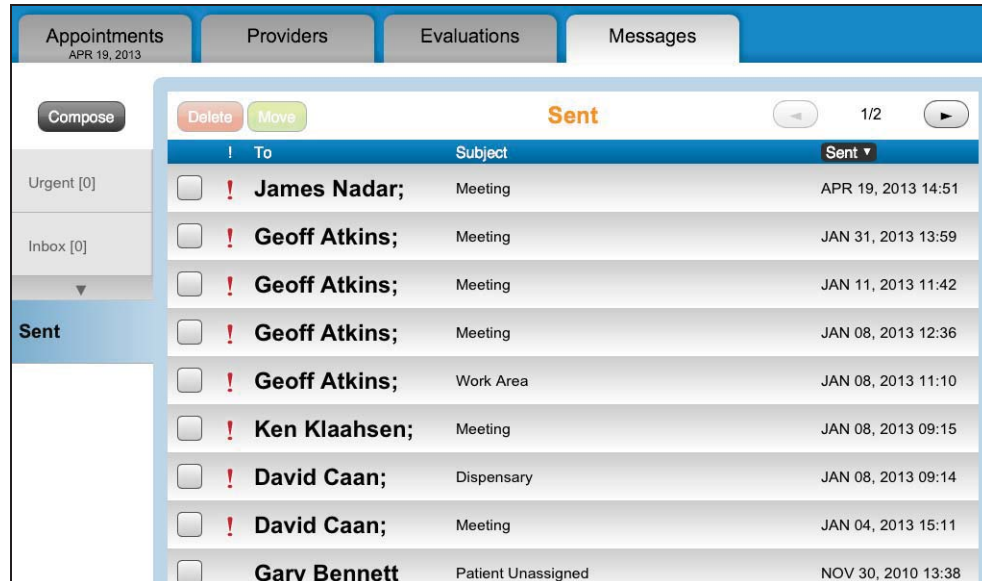


Viewing a Sent Message

▼To view a sent message:

1. Go to the **Messages** tab, and tap **Sent**.

Exan FacultyAccess displays a list of messages that you have sent (urgent and non-urgent, read and unread, but not deleted).



2. Tap a message.

The message subject, send date, recipient list, and message text are shown.

If the sender is:

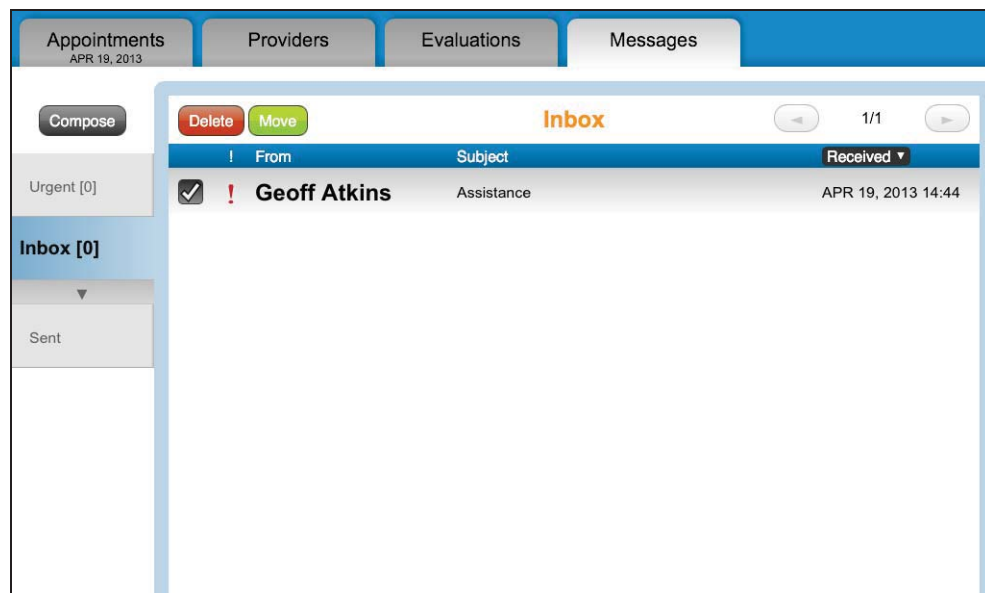
- A provider, the current appointment details are displayed on the left.
- Not a provider, the station name is displayed.

4.5 Moving Messages to Custom Folders

You can move messages to custom folders that have been created in axiUm's Messenger window.

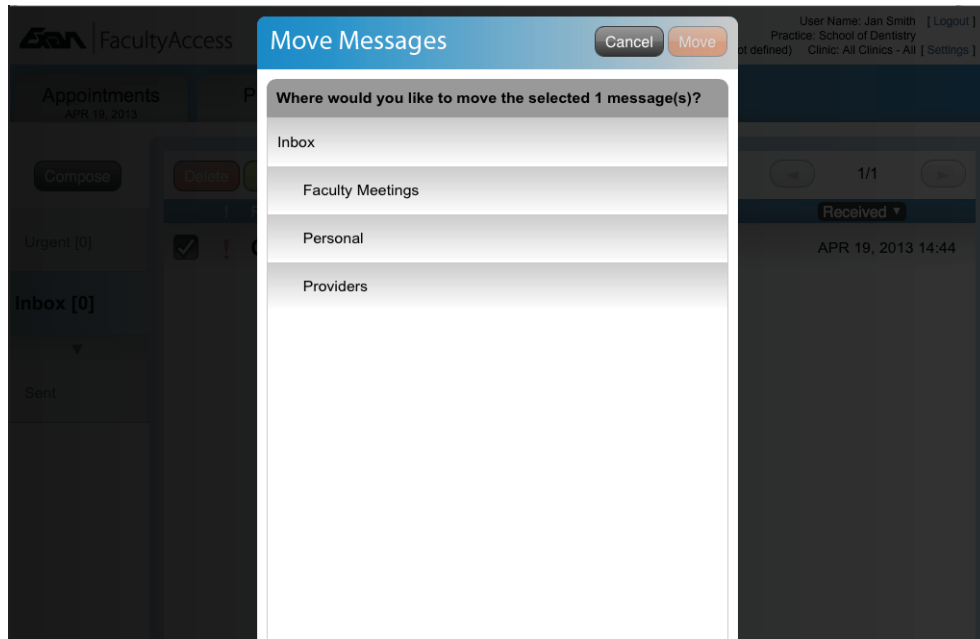
▼To move a message to a custom folder:

1. Go to the **Inbox**, and find the message that you want to move. For example, we will select the message that instructor John Smith sent to Lisa Jaaks about a missing consent form.
2. Tap the check box next to the message that you want to move (you can also multi-select).

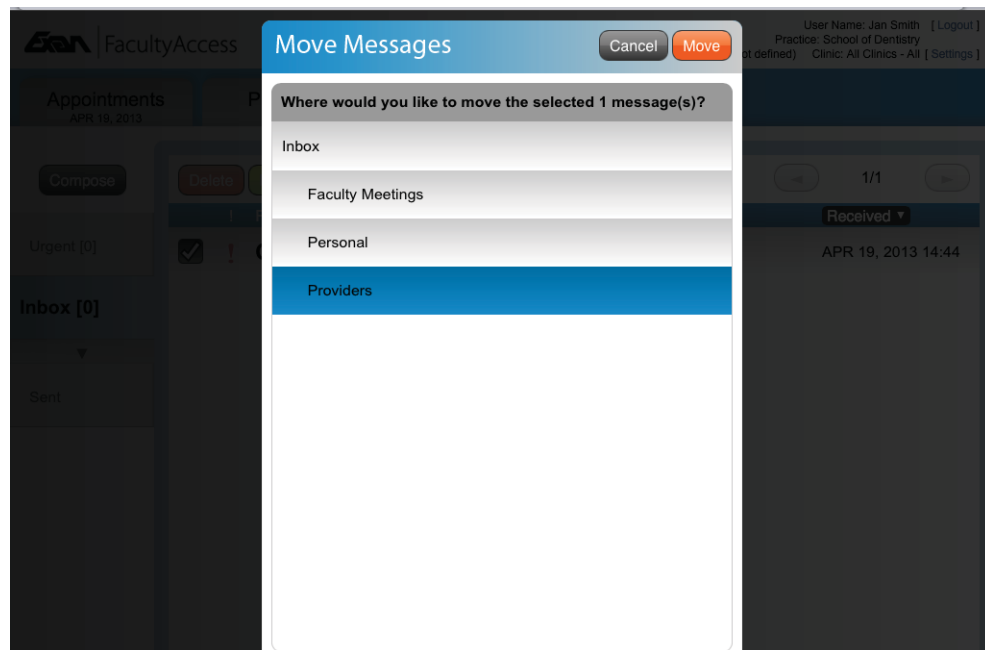


3. Tap **Move**.

The Move Messages pop-up is displayed with the question: “Where would you like to move the selected 1 message(s)?”



4. Tap a custom folder. For example, we will move the message to the Providers folder.



5. Tap **Move**.

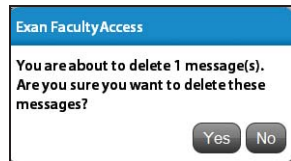
Exan FacultyAccess moves the message to the selected (custom) folder.

4.6 Deleting Messages

▼To delete a message:

1. Go to the **Messages** tab, and tap a check box next to a message.
2. Tap **Delete**.

A pop-up appears, prompting you to tap Yes to delete the message, or to tap No to return to the messages Inbox list.



3. Tap **Yes** to delete the message.