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PREMIER DENTAL SOFTWARE AND SERVICES

axiUm

User Guide for Exan FacultyAccess

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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.

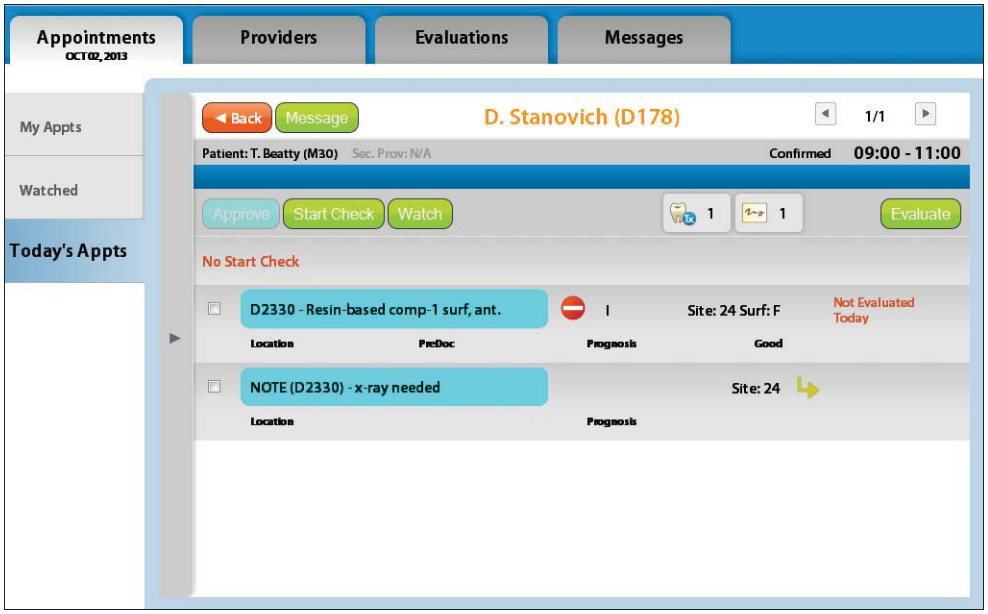
Chair clinical notifications display to the right of each appointment indicating provider requests for start checks, approvals, and assistance. The clinical notification colors may be different in your system because they have been customized in your configuration. For instructions on performing a start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

▼To display details of all appointments in a clinic:

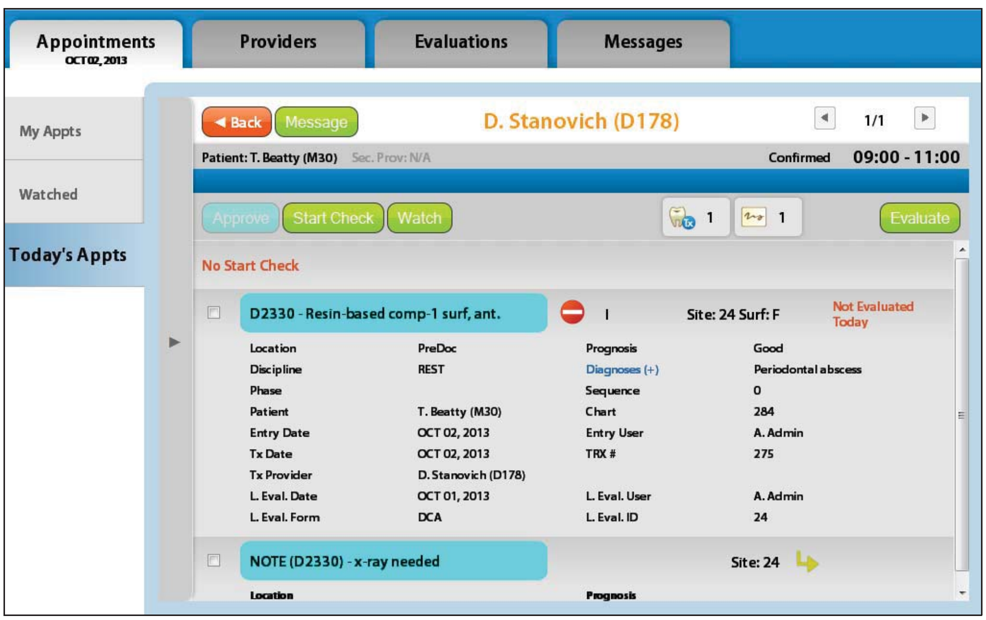
1. Go to the **Appointments** tab, and tap **Today's Appts**.

2. Tap an appointment.

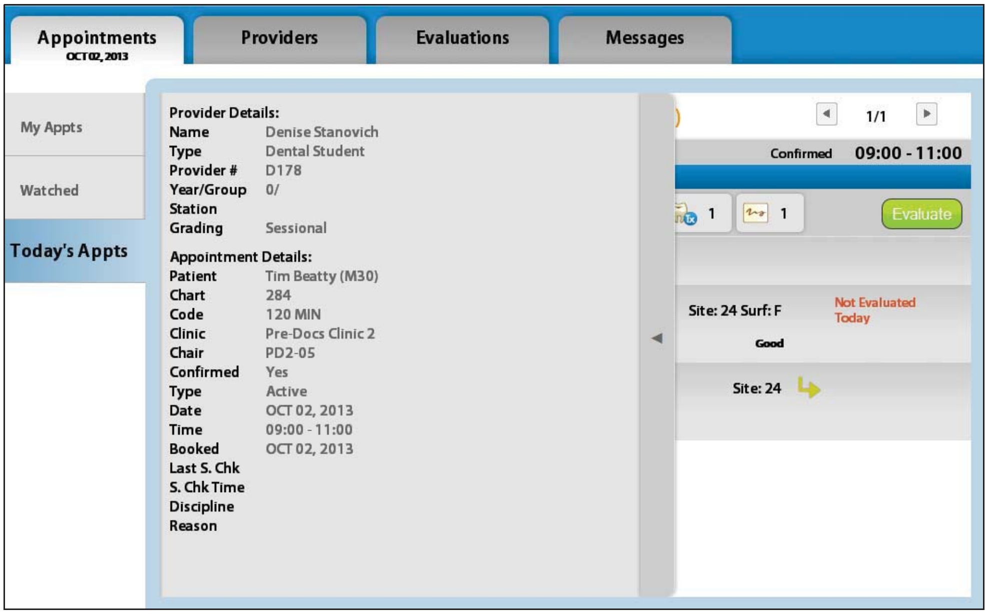
   More details of the appointment are displayed such as the number and type of treatment(s), and also associated notes.



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



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



1.2 Displaying Appointments in Another Clinic

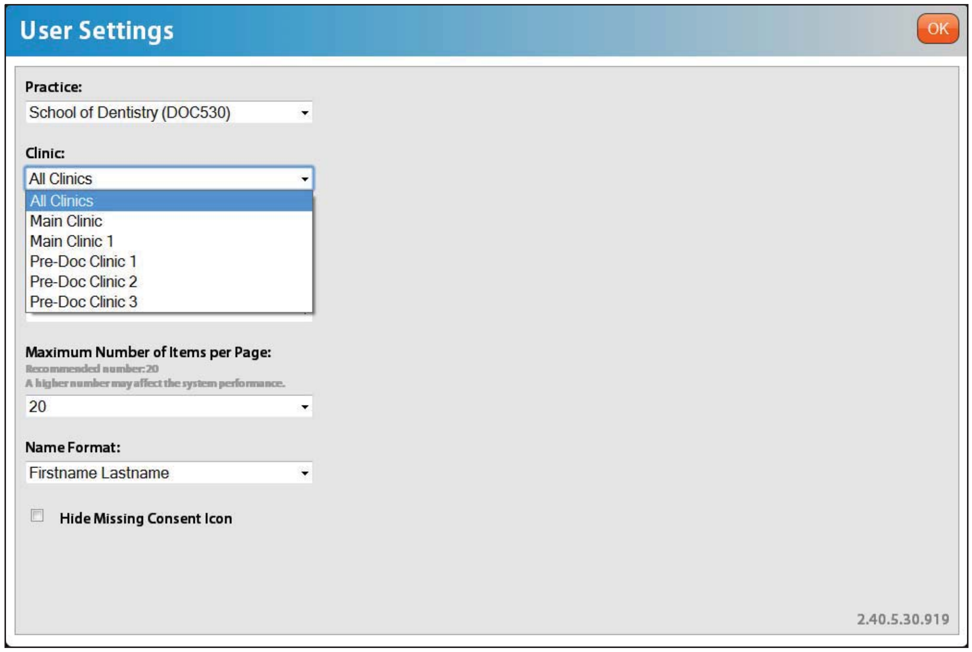
Depending on your access rights, you may be able to display appointments in another clinic.

▼To display appointments in another clinic:

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

   The User Settings page is displayed.

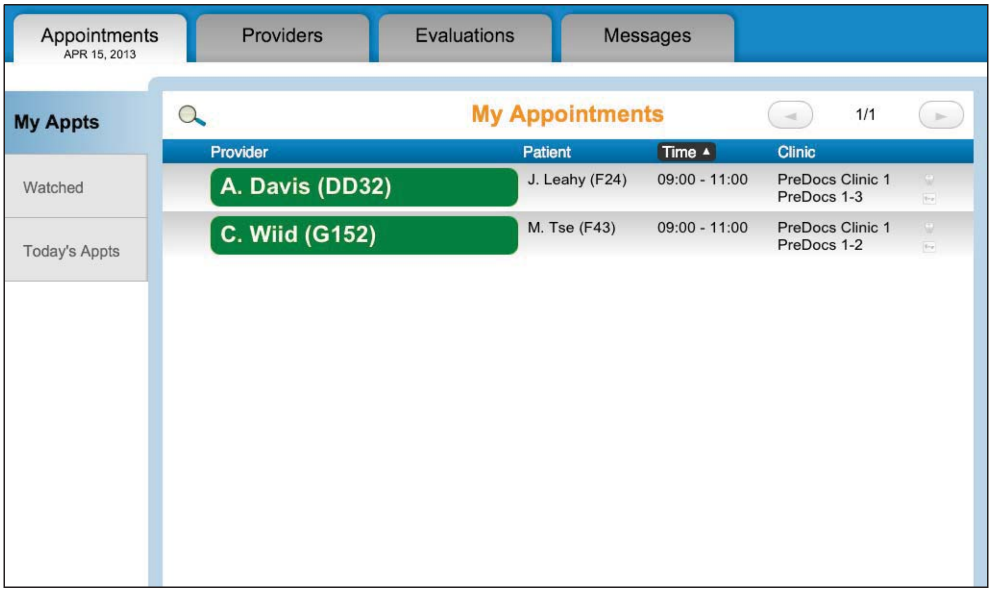
2. Tap the **Clinic** drop-down list, and then tap a clinic.



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.



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

1.3 Displaying Appointments by Session

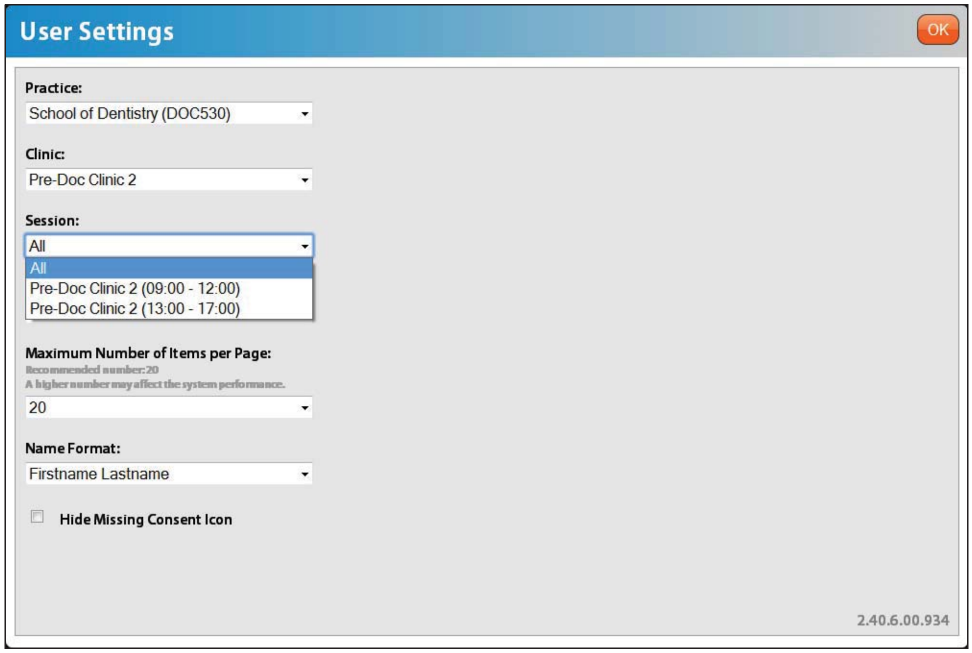
There is a setting that enables you to view all appointments by session.

▼To display appointments by session:

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

   The User Settings page is displayed.

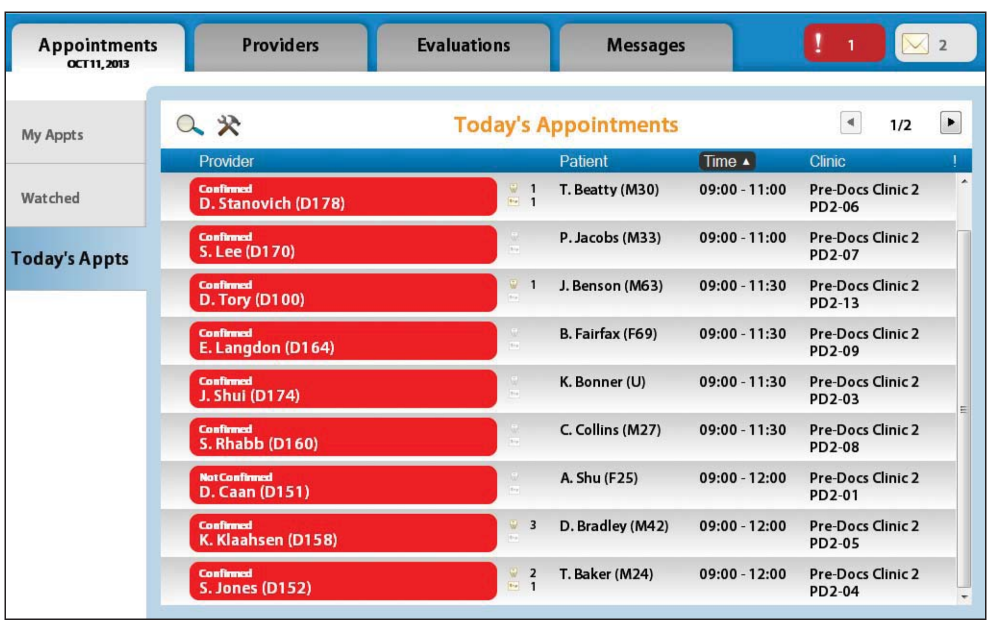
2. From the **Clinic** drop-down list, tap a clinic. For example, we will select Pre-Docs Clinic 2.
3. From the **Session** drop-down list, tap a session.



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.



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

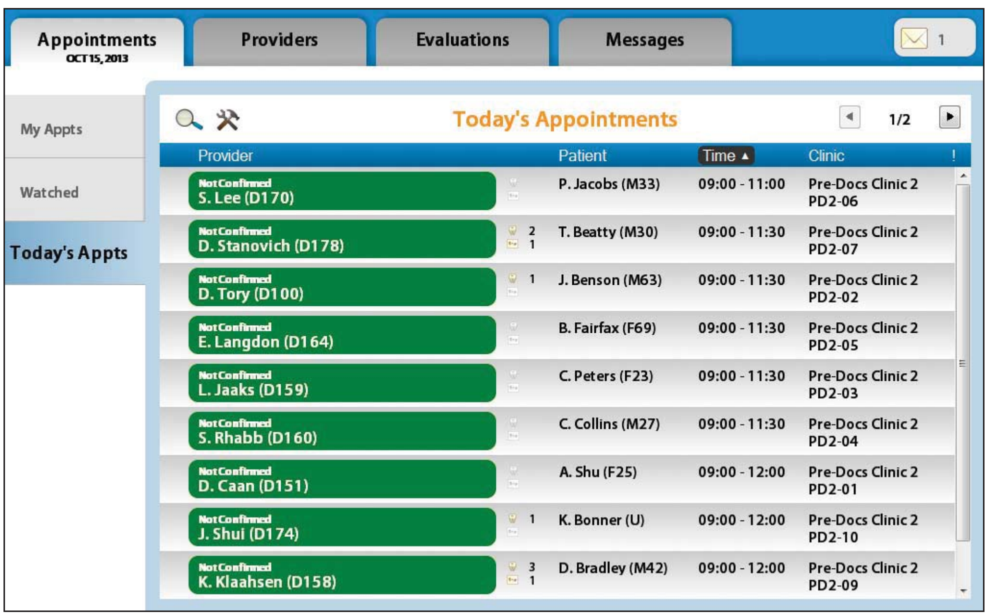
1.4 Displaying Your Appointments

Appointments displayed on the My Appts page are those appointments that you have start checked. These are appointments that you are supervising.

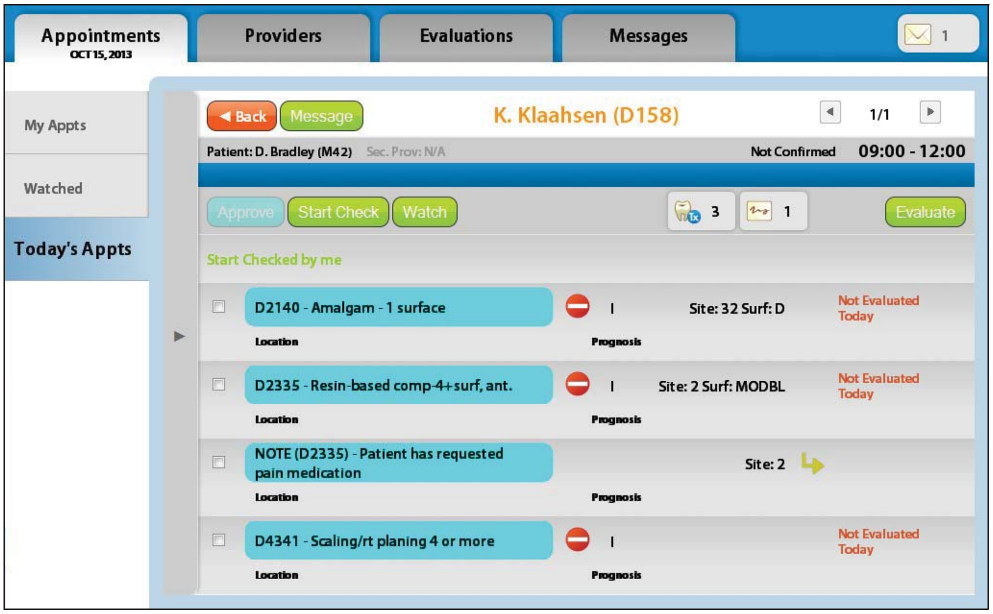
▼**To display your appointments:**

1. Go to the **Appointments** tab, and tap **My Appts**.

   Exan FacultyAccess lists all the appointments that you have start checked.



2. Tap an appointment.



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

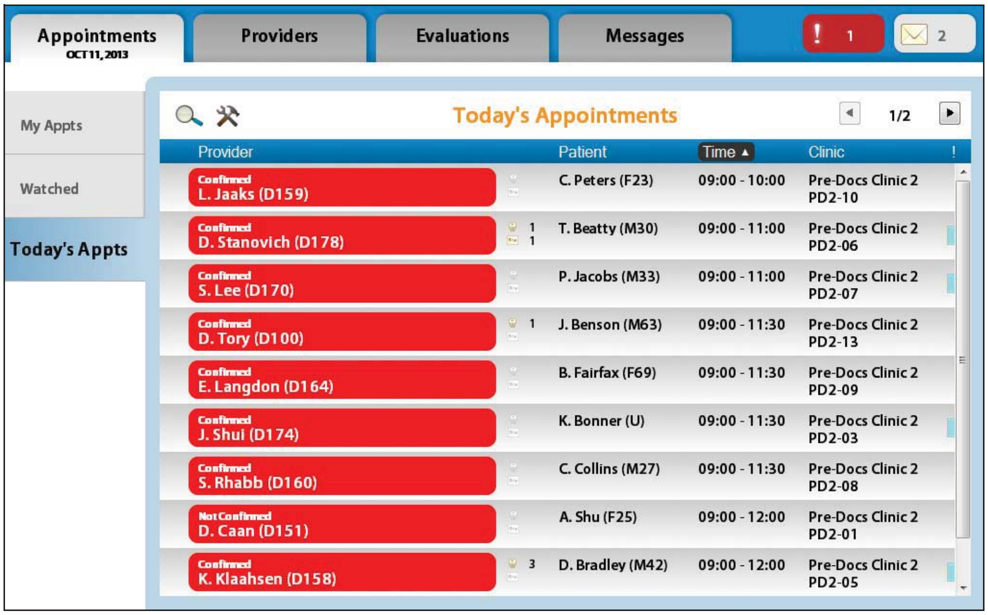
Appointments with a red background require a start check. When you start check an appointment on a provider’s appointment page, the appointment also displays on the My Appointments page.

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**.



Appointments with a red background require a start check.

2. Tap an appointment that requires a start check.

3. Tap **Start Check**.

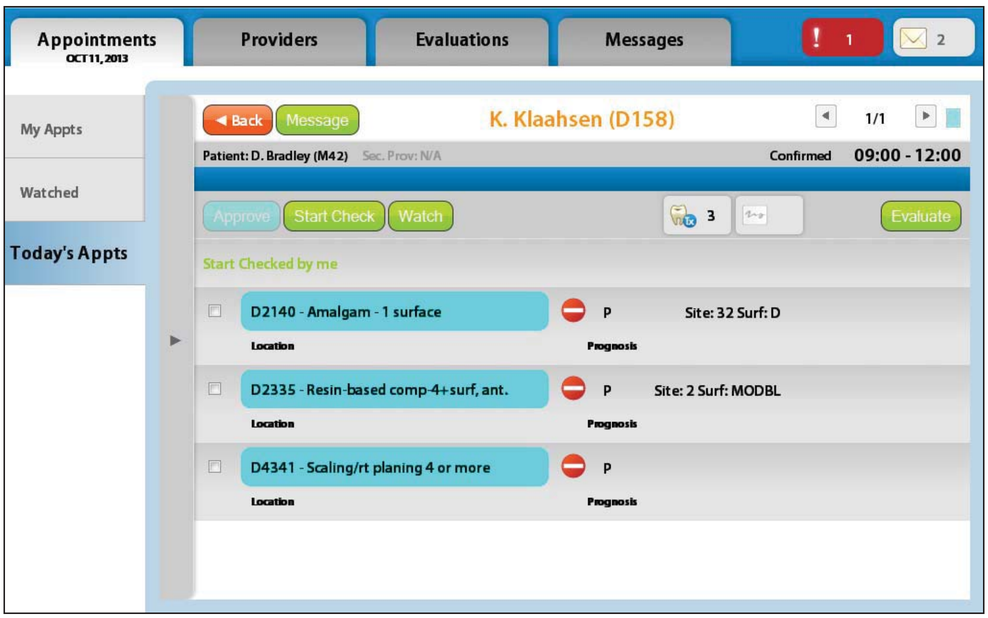
Exan FacultyAccess displays the start check notice.

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.

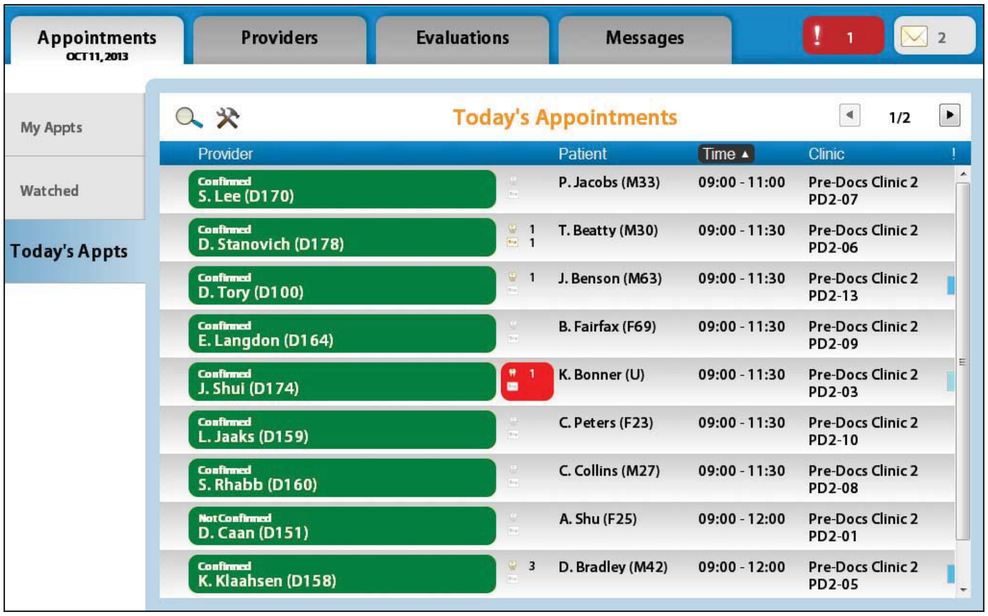
You can also start check an appointment that has already been start-checked by another instructor. Doing so will place this appointment under your list.

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.



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

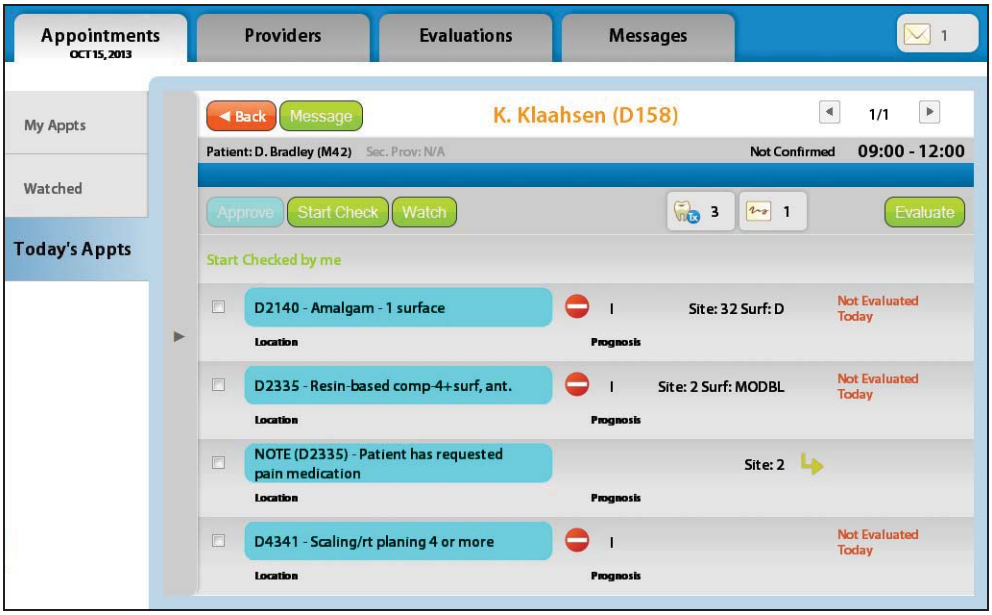
You can approve an appointment and treatment items, including notes associated with the treatments.

▼To approve a treatment:

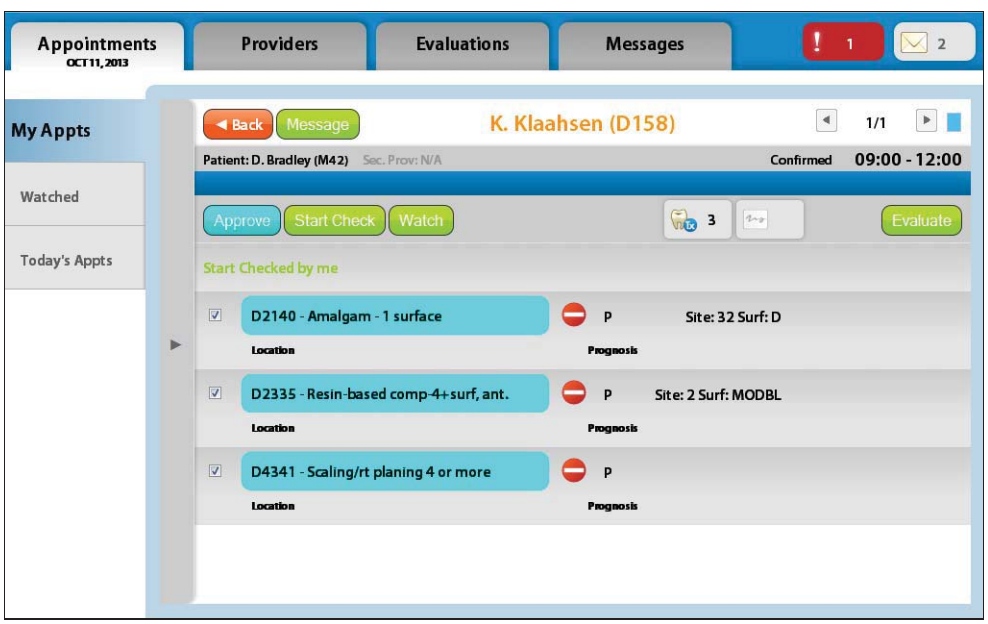
1. Go to the **Appointments** tab, and tap **My Appts**.
2. Tap an appointment.

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.

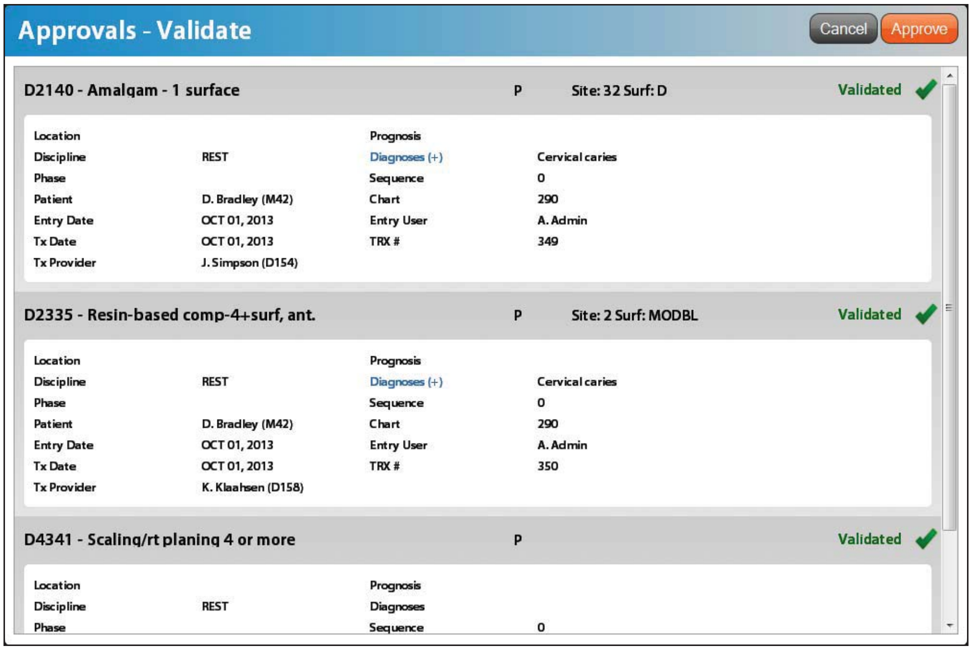


4. Tap one or more check boxes next to the unapproved treatment item(s).



5. Tap **Approve**.

Exan FacultyAccess displays the Approvals - Validate page.



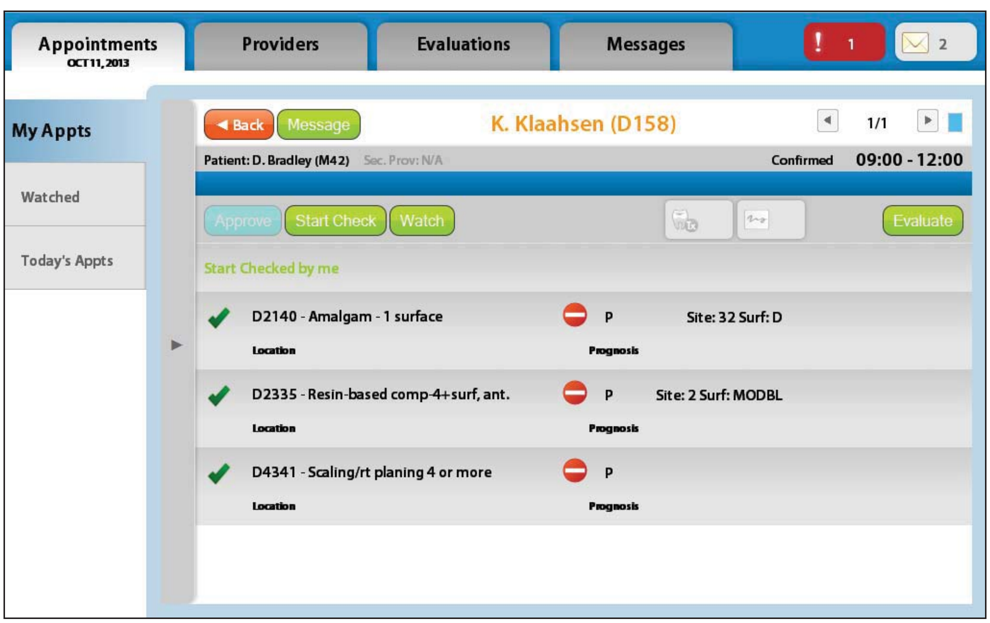
6. Review the item(s) including any warnings/errors on this page.
7. Tap **Approve** to complete the approval of the item(s).

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

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.

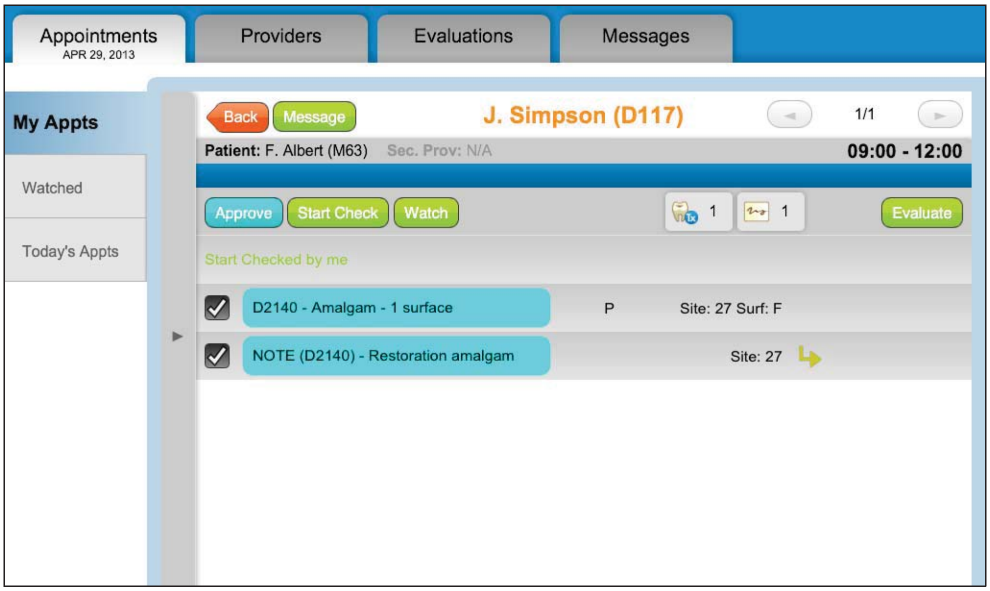


1.8 Editing an Unapproved Treatment Note

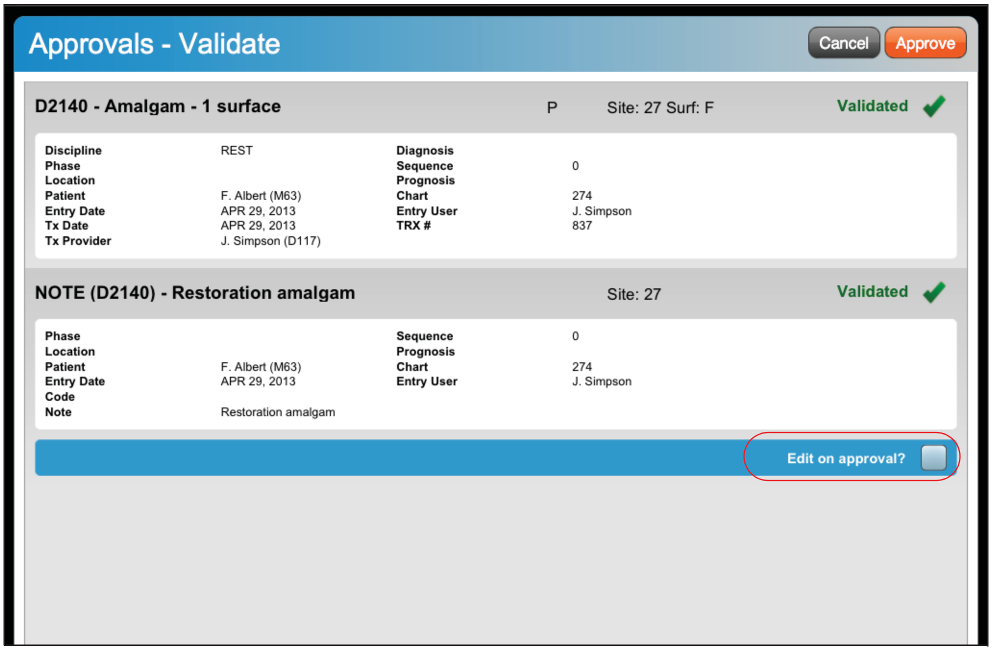
If you have one or more notes attached to an unapproved treatment, you can edit this note during the approval stage.

▼**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.

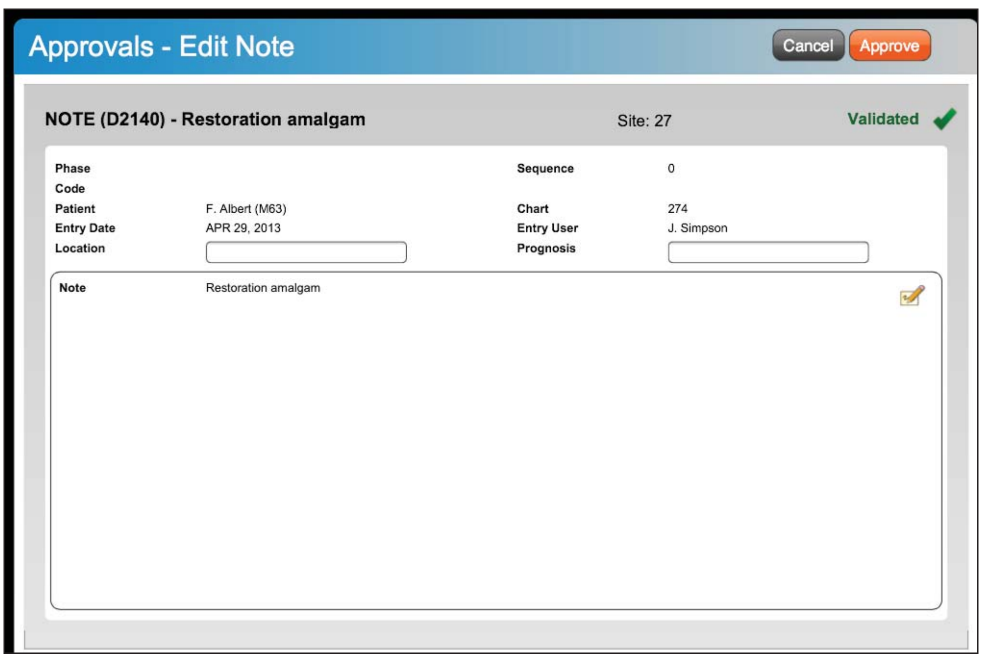


2. Tap **Approve**.



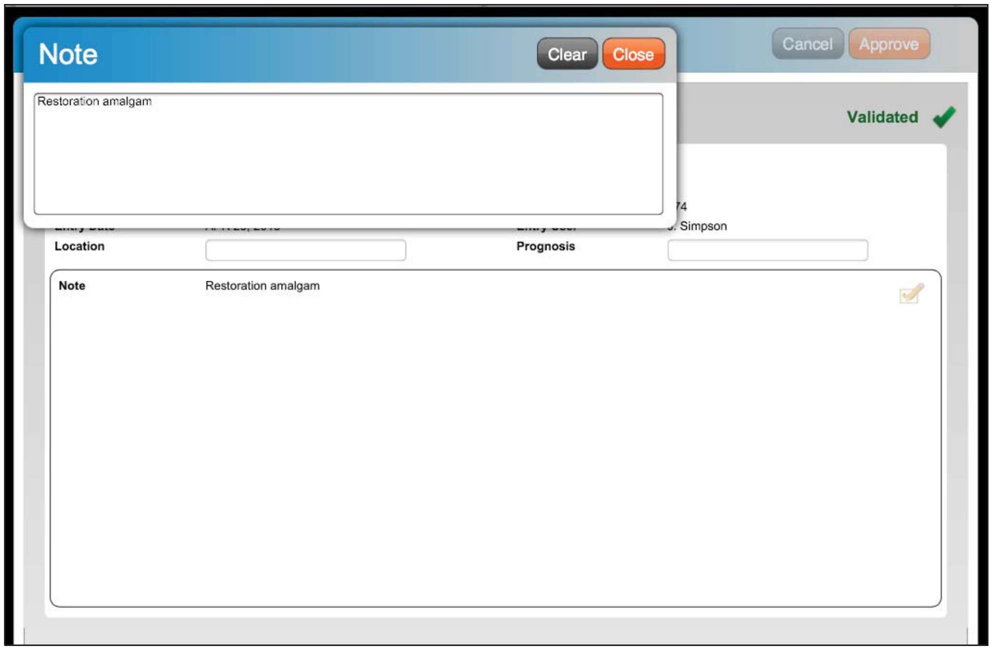
3. On the **Approvals - Validate** page, click the **Edit on approval?** check box to select it.
4. Tap **Approve**.

   The Approvals - Edit Note pop-up appears.

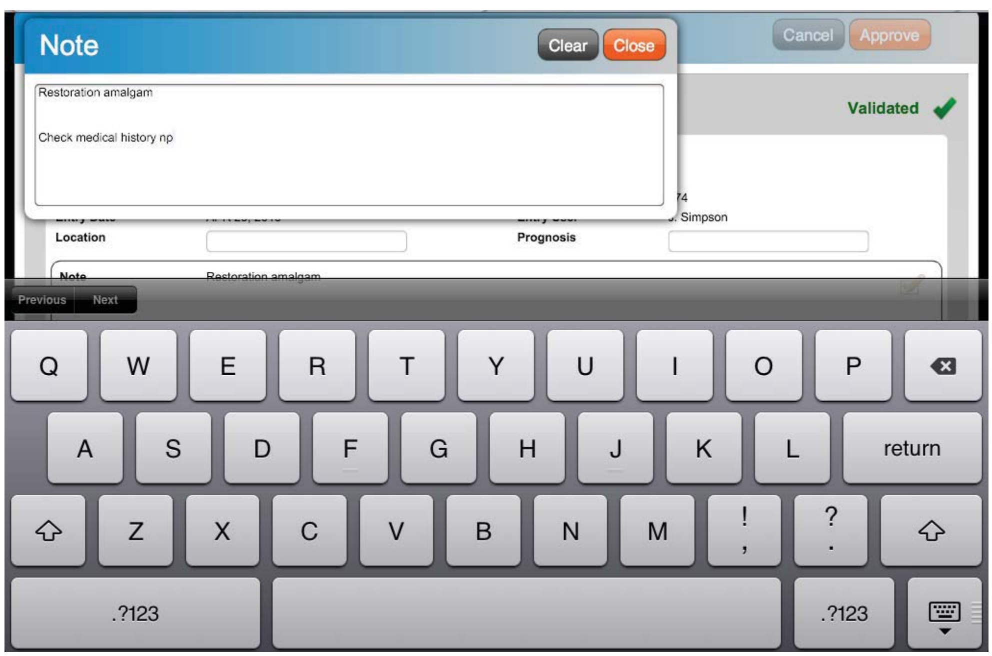


5. Tap the  (**Small note**) icon in the **Note** area.

The Note pop-up appears.



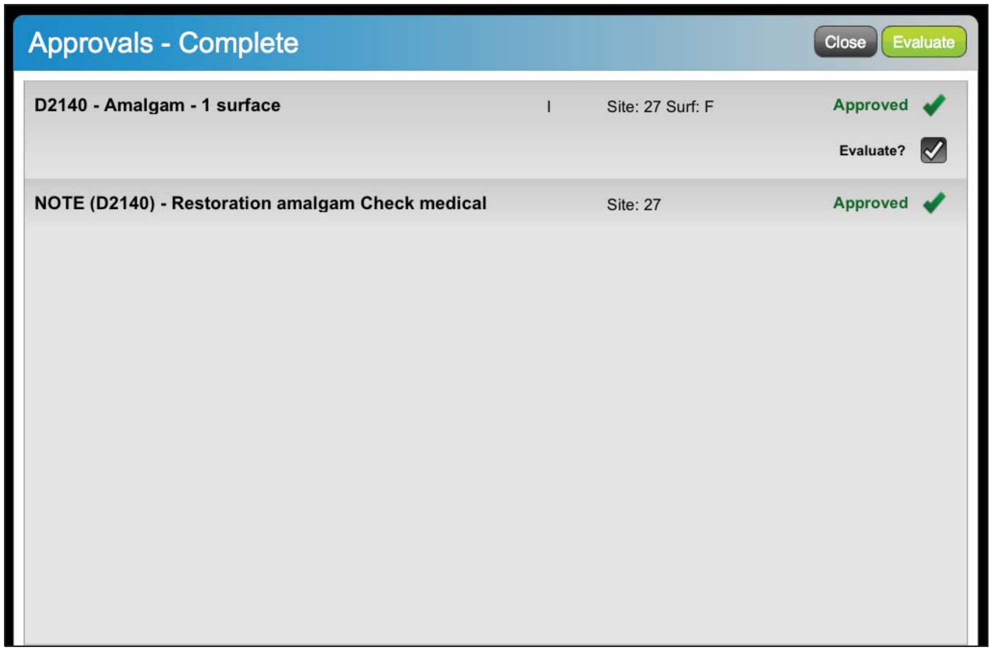
6. Tap the **Note** area to display the on-screen keyboard, and make your edit.



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**.

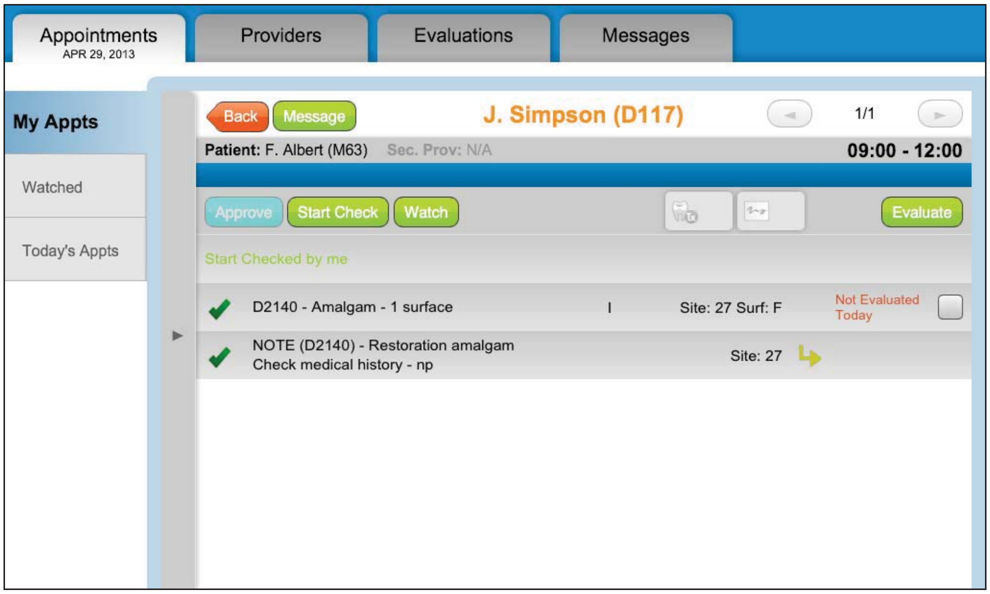
The Approvals - Complete page is displayed.



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:

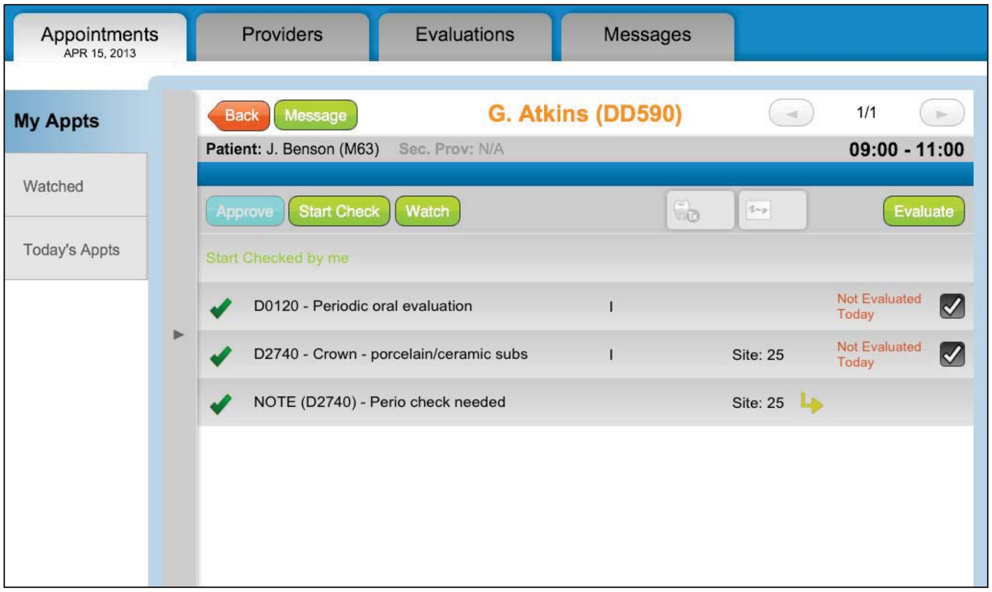
- Red text “Not Evaluated Today” next to a treatment indicates that the treatment requires grading, but has not been graded today.
- Green text “Evaluated by Me” next to a treatment indicates that you as the instructor graded the evaluation today one or more times.
- Gray text “Evaluated Today” next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

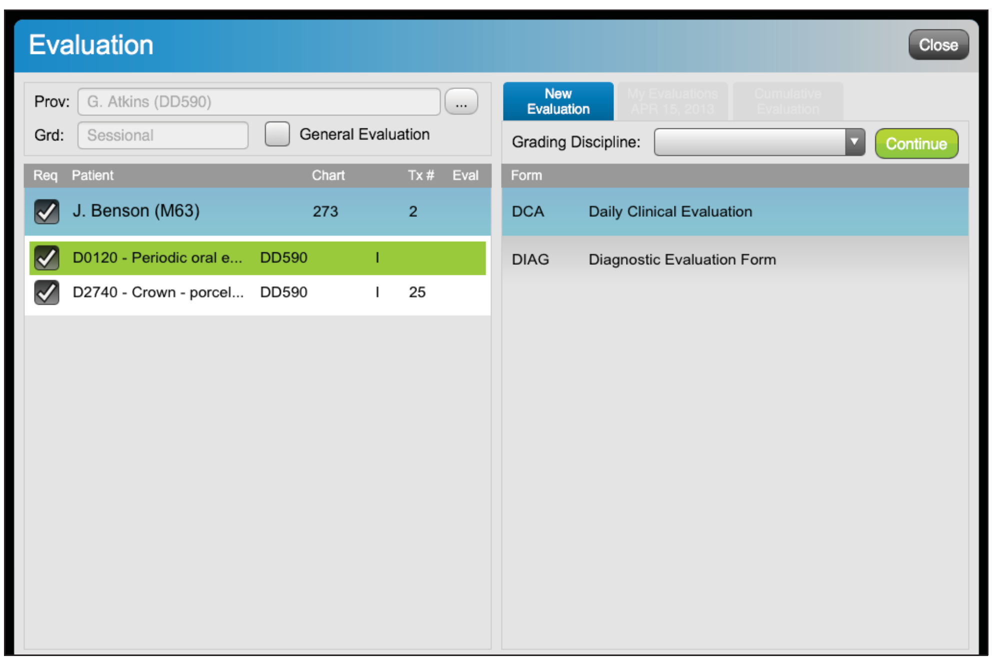
   The appointment provider details page is displayed.

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



4. Tap **Evaluate**.

The Evaluation form selection page is displayed.



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

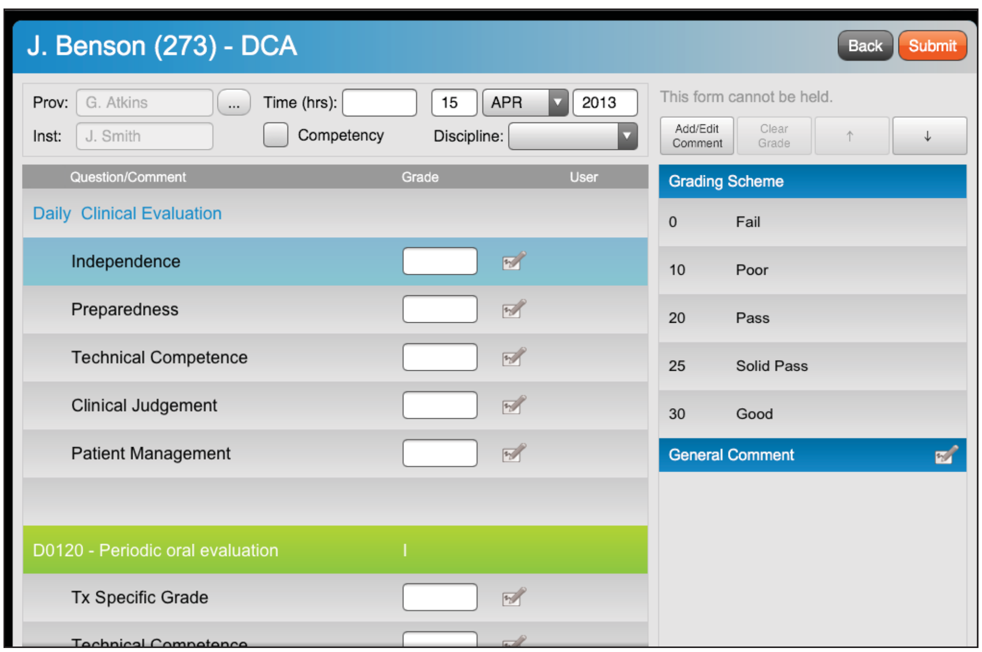
*After completing a new evaluation, the instructor may choose another provider to grade against the same appointment treatments, by selecting the Prov: … (***ellipsis***) button.*

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.

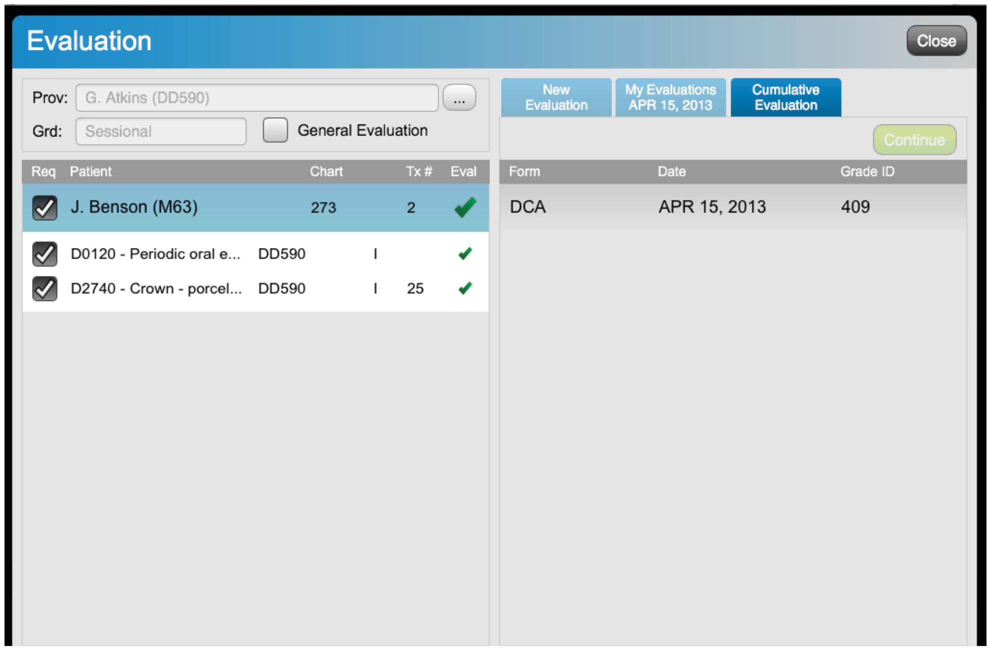


7. Enter grades for each evaluation criterion.

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.

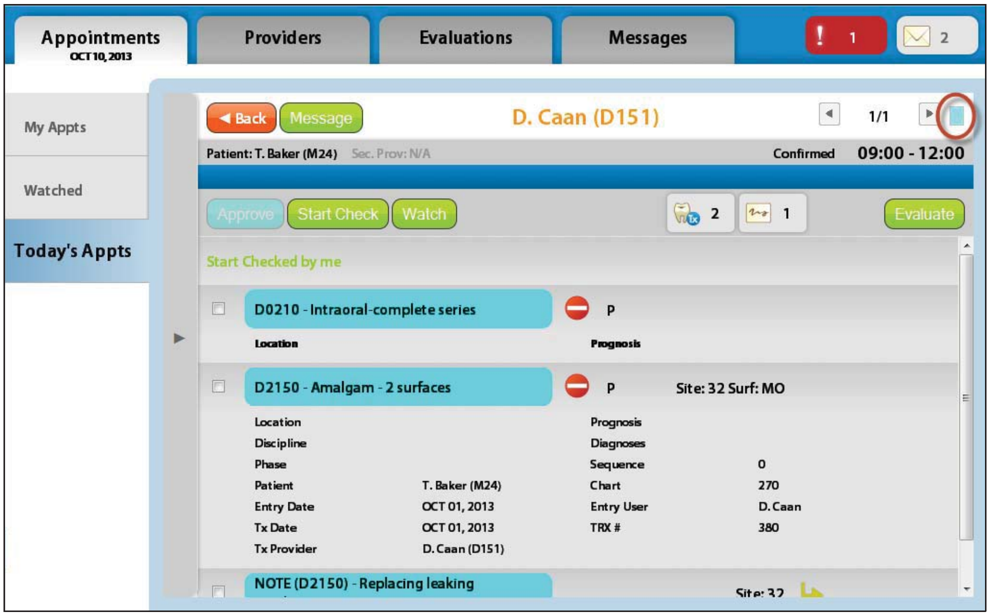
1.10 Clearing a Clinical Notification Indicator

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

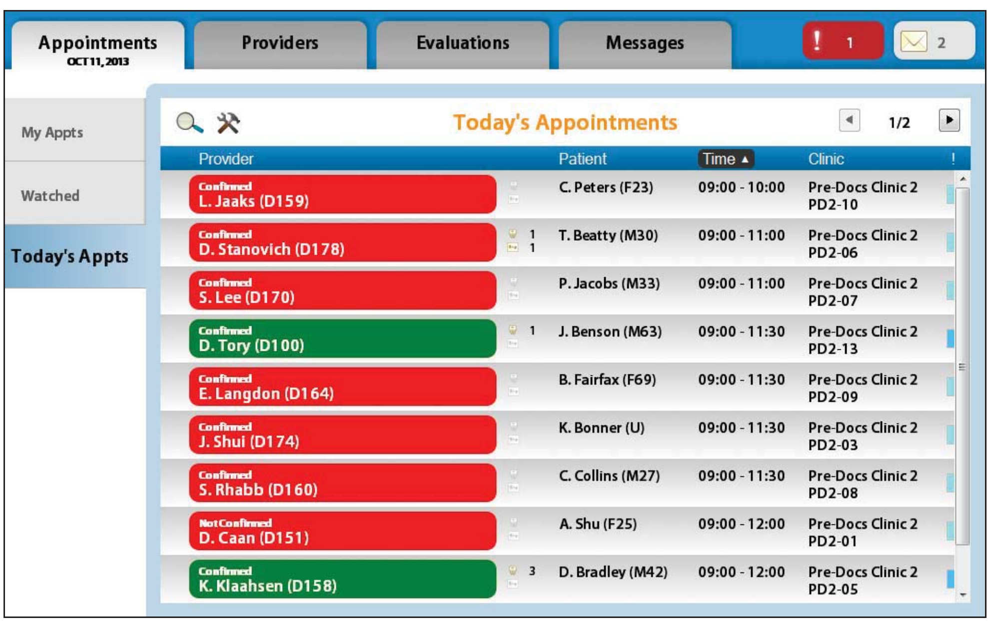
At the beginning or during a session, you can filter an appointment list on chair notification states; for example, you can filter the appointment list based on start check and approval requests.

▼To filter appointments on chair notification states:

1. On the **My Appts/Watched/Today's Appts** page, tap  (**List Settings**) to display the List Settings pop-up.

> *Use the Reset button to display the original list of unfiltered appointments.*

2. Go to the **Display chairs with notification states** area, and tap (uncheck) the chair notification states that you do not wish to view. For example, we will tap (uncheck) all check boxes except for the **Ready for start check** and **Need Approval** check boxes.
3. Tap the **OK** button.



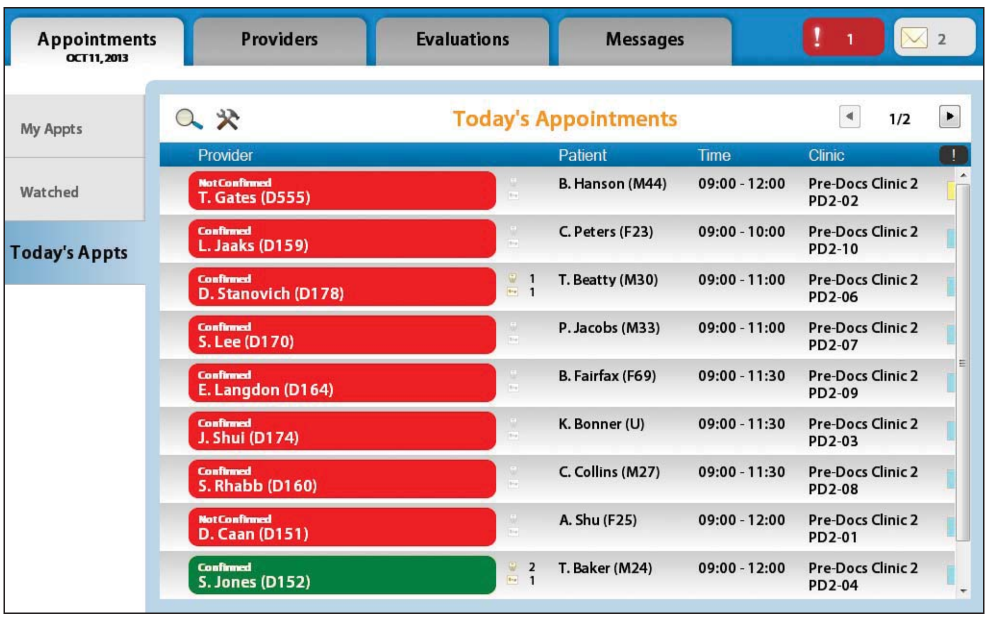
In the above example, appointments have been filtered to show only those with start check and approval requests.

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.



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.

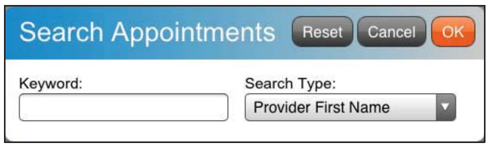
You can also search for appointments on patient first/last names.

▼To search for an appointment:

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

2. Tap (**Search Appointments**).

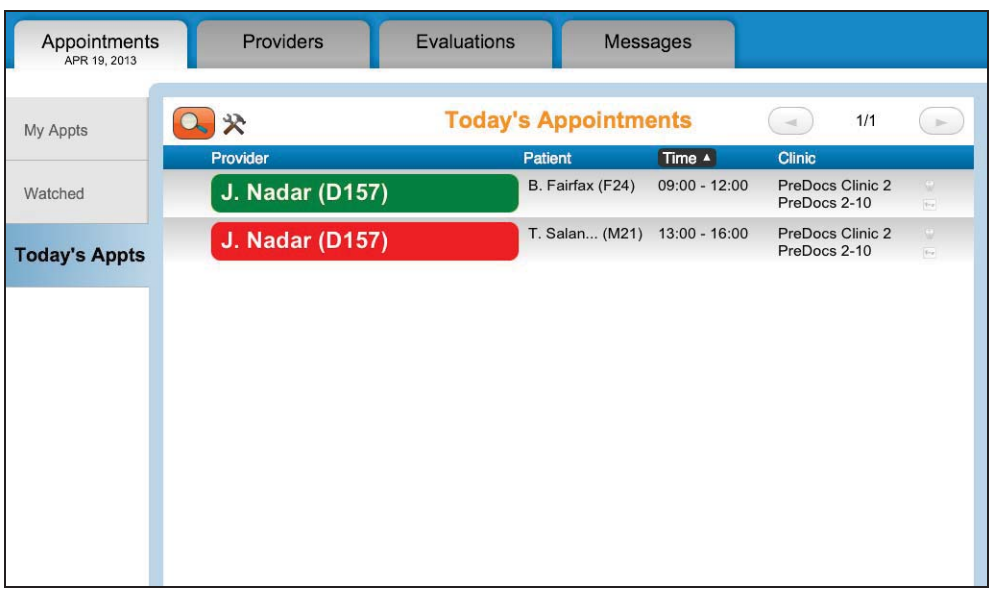
   The Search Appointments pop-up is displayed.



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:

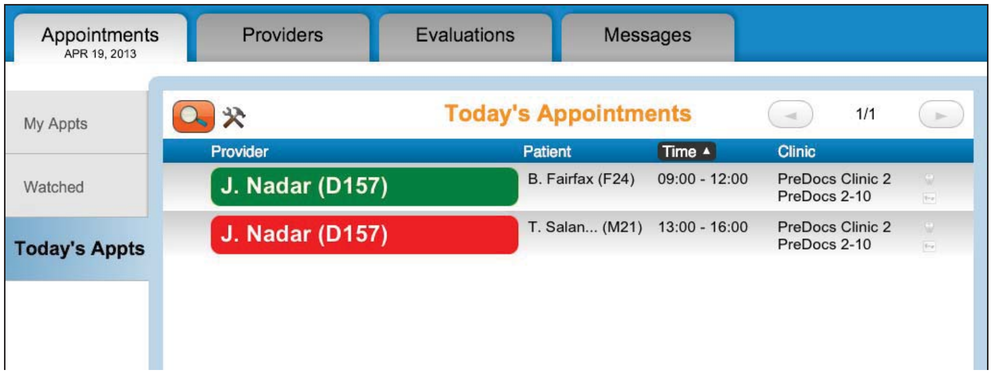


This (Search) icon with a read background, above the search results, indicates that the currently displayed list is being filtered. After you have completed your search, you can clear the search to display all appointments again.

Clearing Appointment Search Results

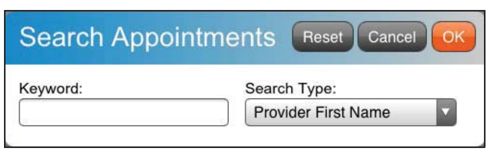
▼To clear the search results:

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**).

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:

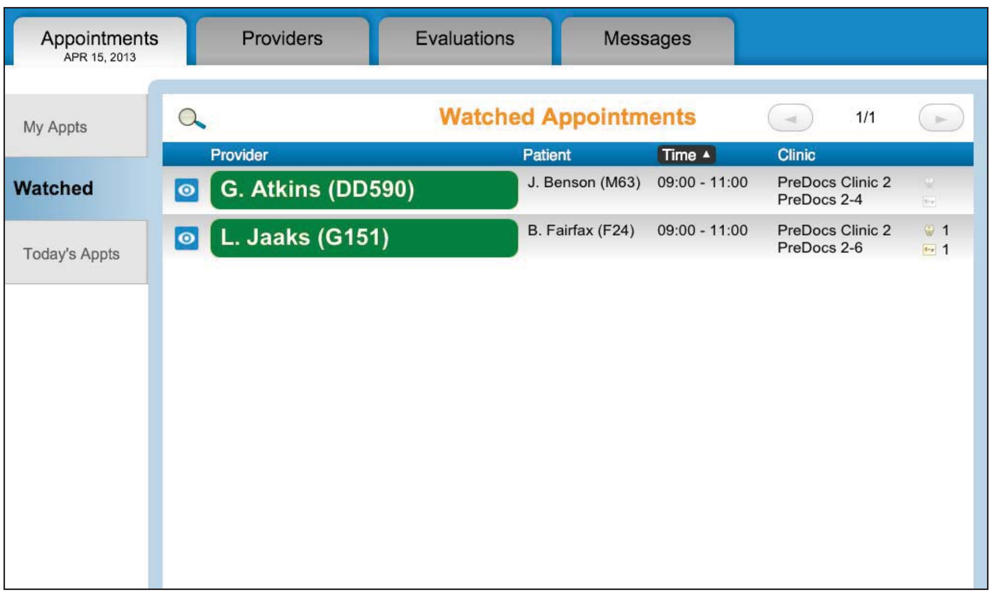
1. Go to the **Appointments** tab, and tap **My Appts/Today's Appts**.
2. Tap an appointment to display the appointment providers details page.
3. Tap **Watch**.

   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

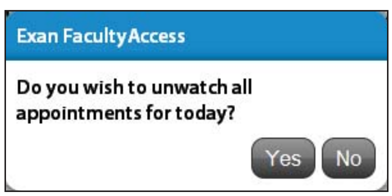
You can quickly clear all appointments on the Watched list.

▼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

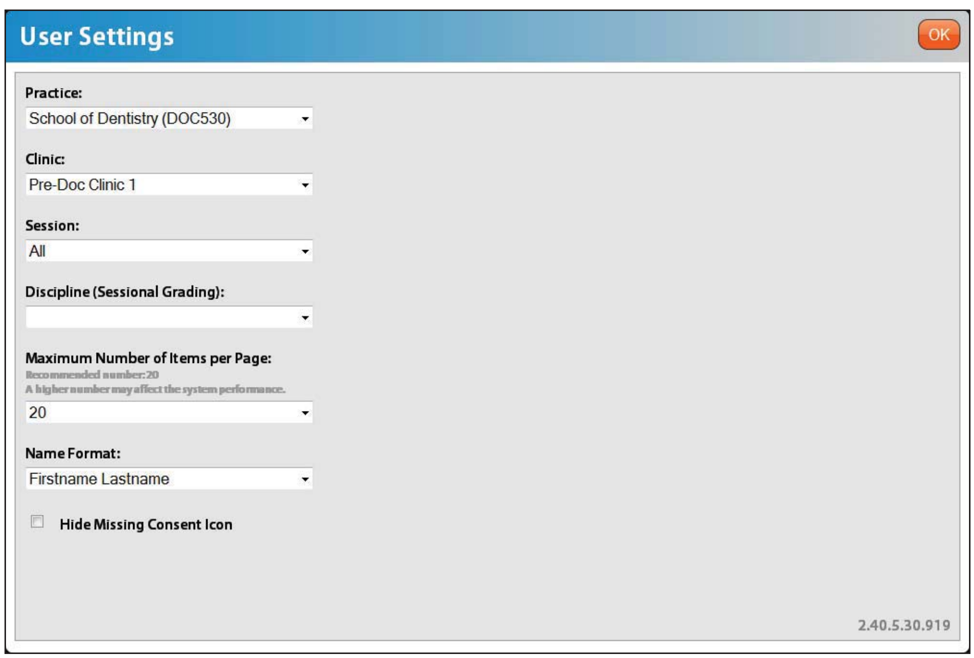
2.1 Displaying Providers with Reserved Chairs in a Specific Clinic

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.

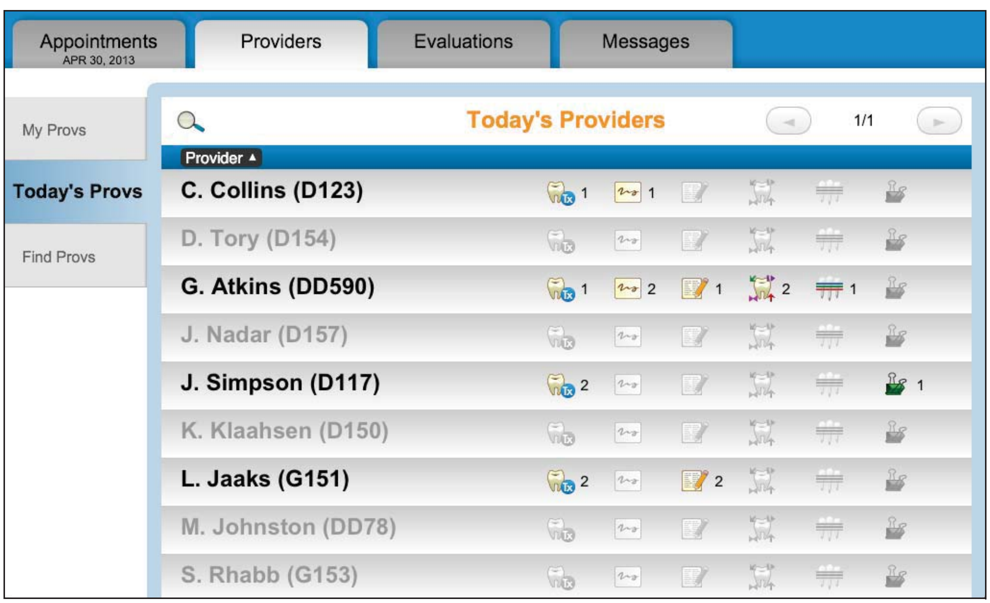


   If you have access to other clinics, you can view a list of providers with reserved chairs in other clinics.

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

4. Tap **OK**.

Exan FacultyAccess displays a list of providers in the selected clinic. The example below shows providers in the PreDocs Clinic 2.



Exan FacultyAccess displays a list that includes:

- Provider details
- A list of all unapproved items for that provider and details about those items

2.2 Displaying Providers You Start Checked Today

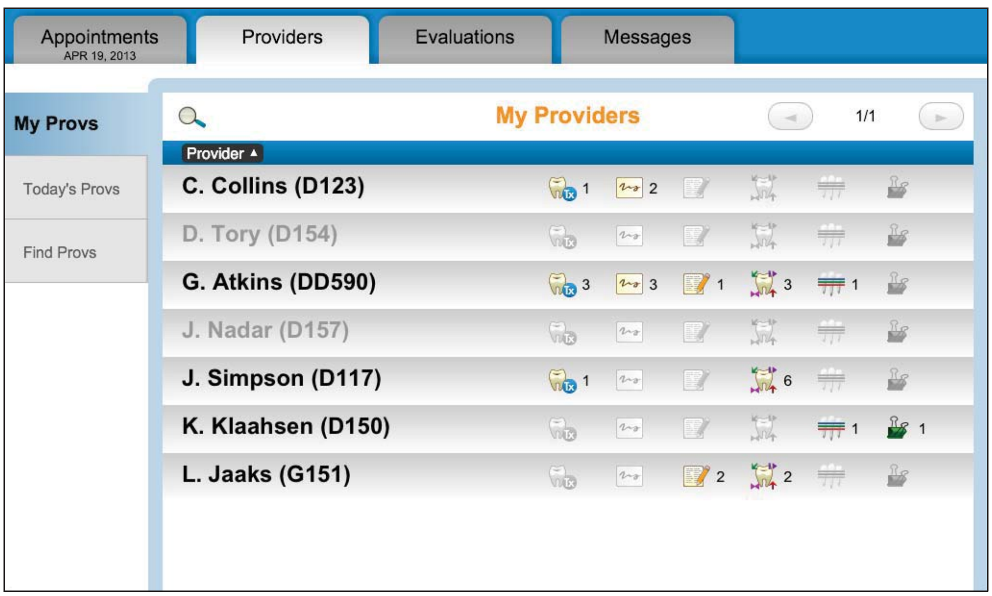
Exan FacultyAccess enables you to view a list of providers who are under your supervision as well as the number of unapproved items for each provider. At a glance, you can view the number of treatments, notes, EPR forms, clinical findings, periodontal charts, and letters that need to be approved. Items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

▼To display a list of your providers:

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

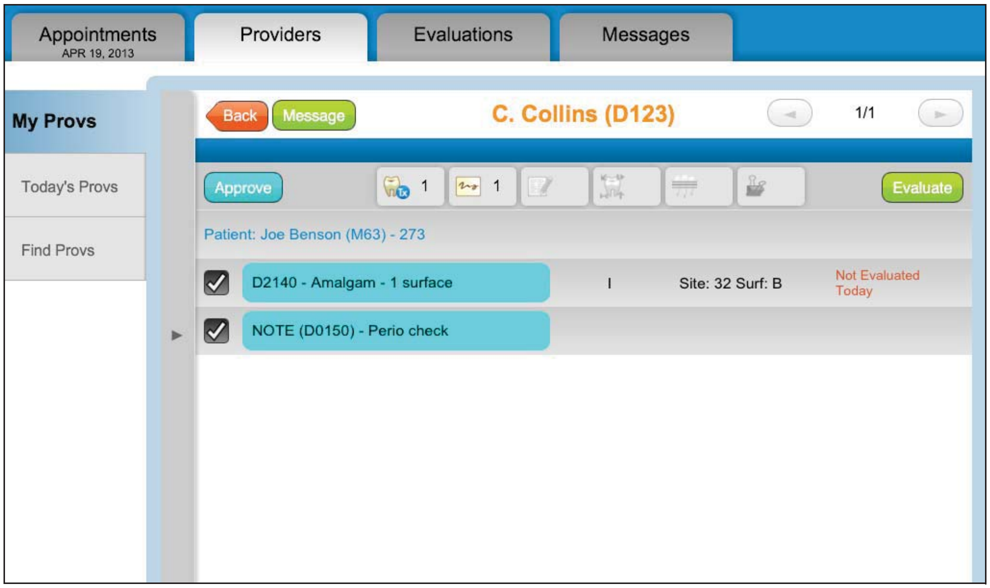
   Exan FacultyAccess displays a list of providers that you have start checked today.

   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.



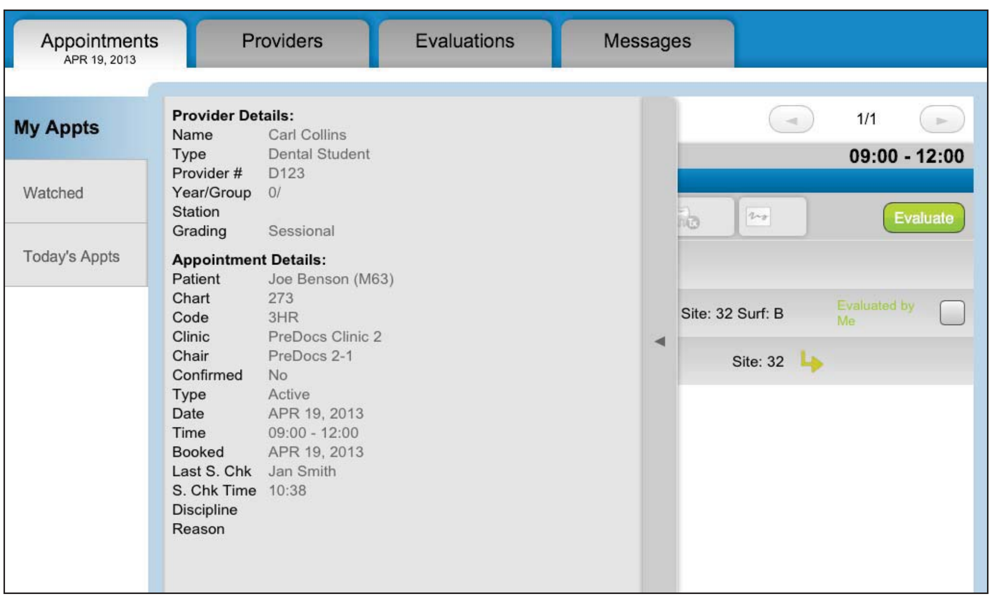
2. Tap a provider record.

   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)

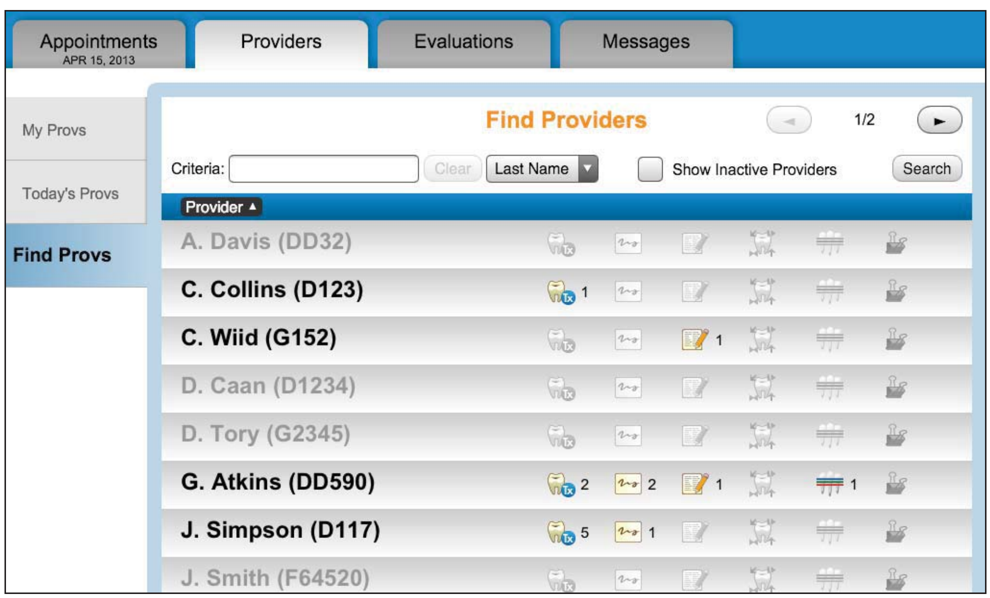
The difference between the two methods is that the Find Provider page enables you to search for providers that do not appear on My Providers page or Today's Providers page (i.e., to find providers who do not have chair reservations today).

▼To search for providers:

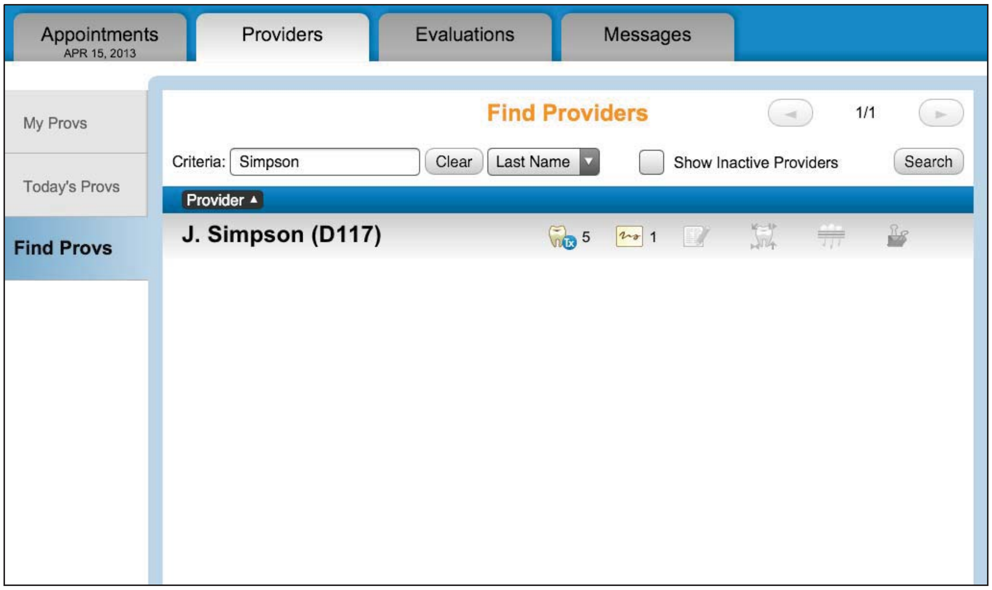
1. Go to the **Providers** tab, and tap **MyProvs/Today's Provs/Find Provs**.

2. Tap **Find Provs**.

   The Find Providers page is displayed.



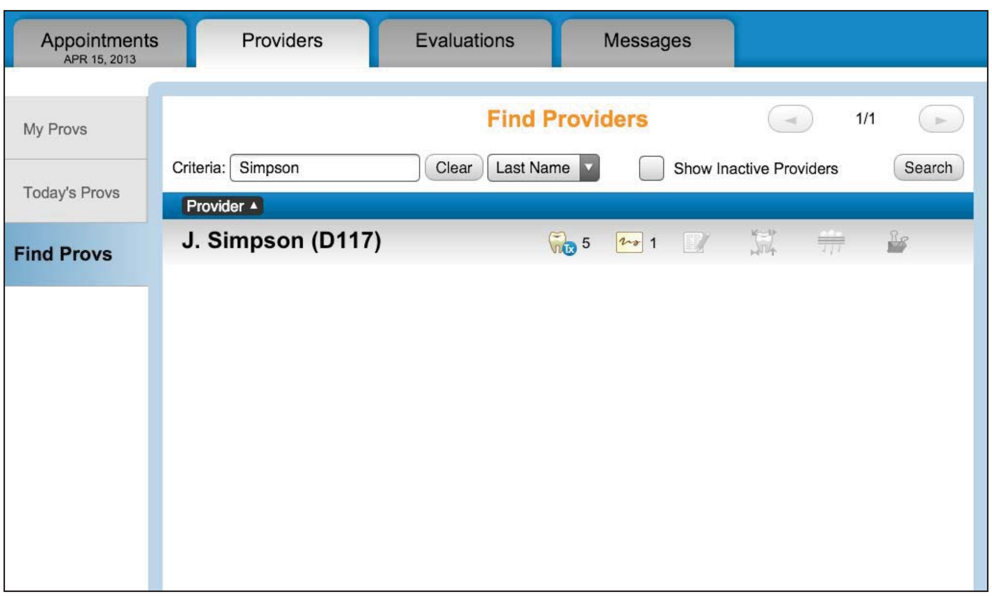
3. Tap the **Criteria** box, and using the on-screen keyboard, type an entry. For example, we will enter `Simpson`.
4. From the drop-down list, tap an option. For example, we will select `Last Name`.
5. Tap the **Search** button.



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**.

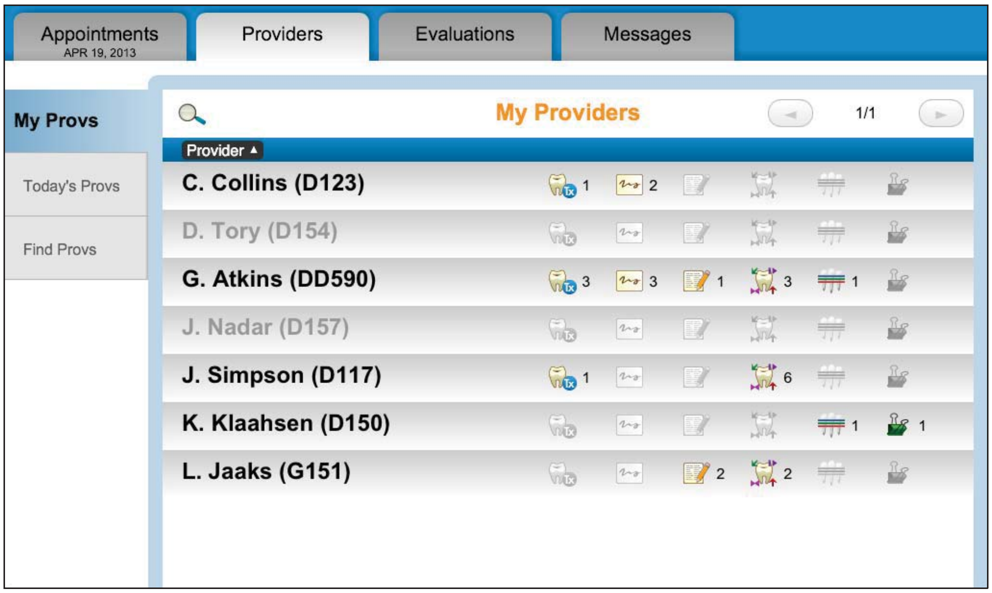
   You are returned to the page that displays the providers for the selected clinic.

2.5 Approving Provider Treatments

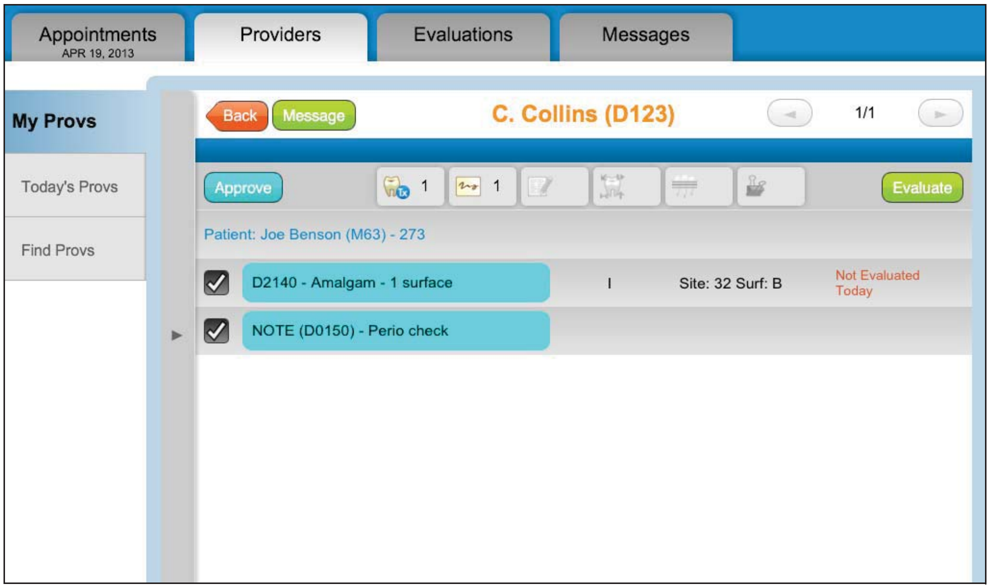
Provider details that you may approve include treatments, notes, EPR forms, clinical findings, periodontal charts, and letters.

▼**To approve provider treatments:**

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

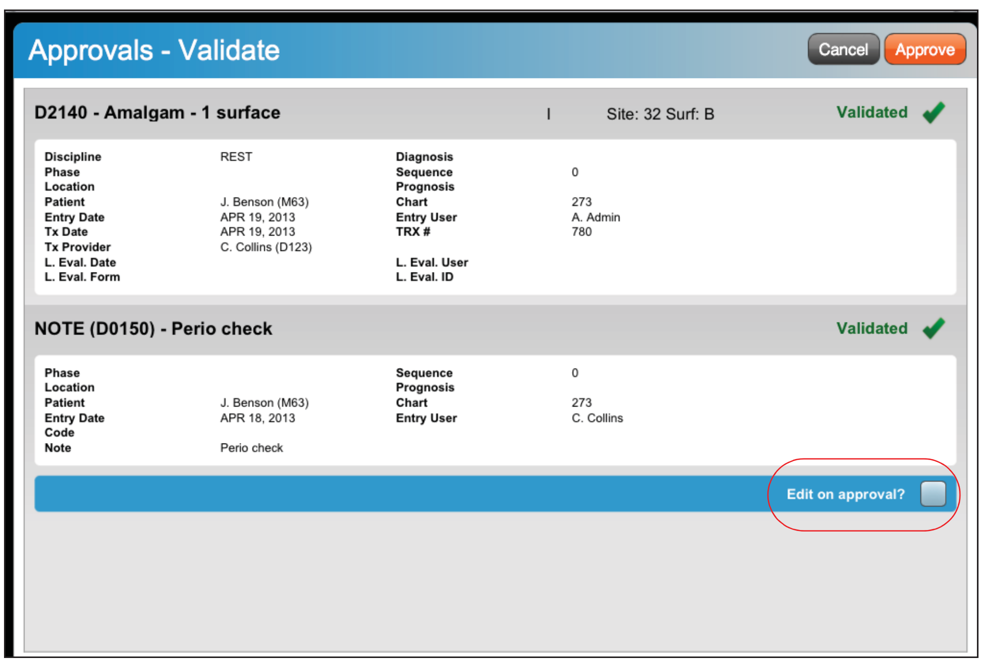


2. Tap a provider. For example, we will select C. Collins.
3. On the provider details page, tap a check box next to one or more unapproved procedures.



4. Tap **Approve**.

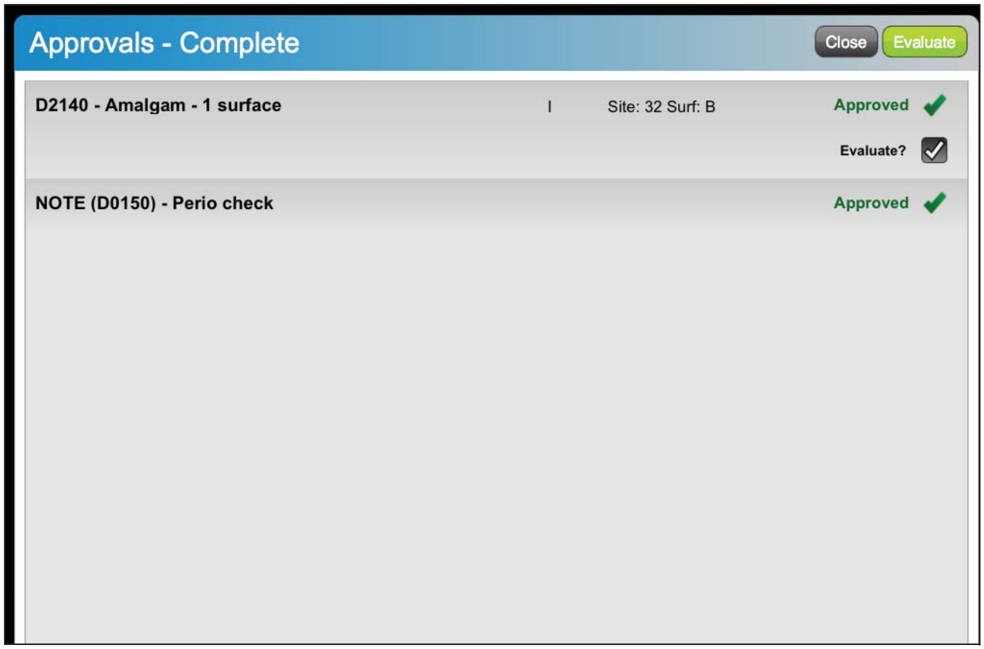
Exan FacultyAccess displays the Approvals - Validate page.



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

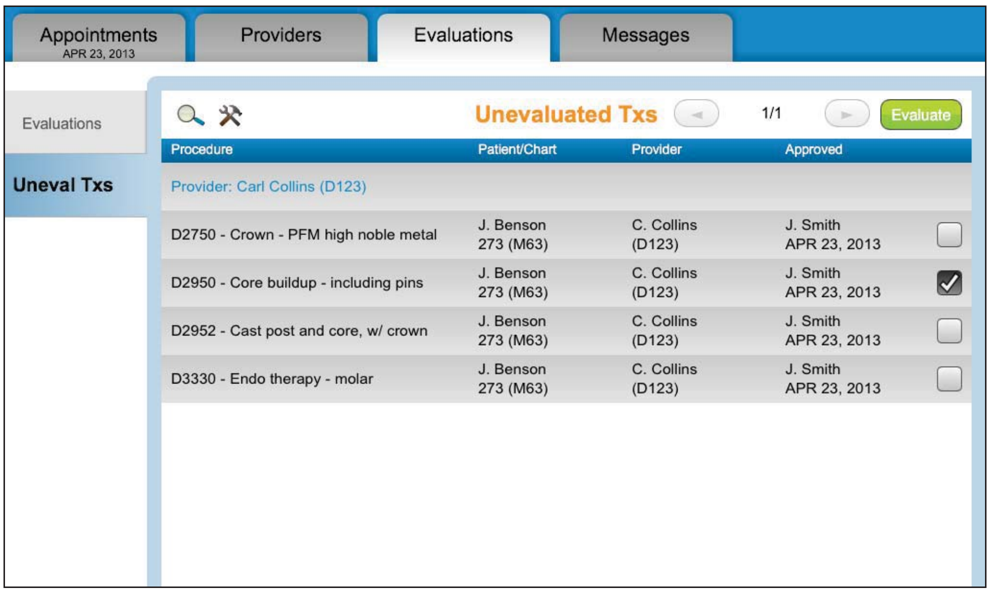
3.1 Displaying Unevaluated Treatments

▼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.



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.

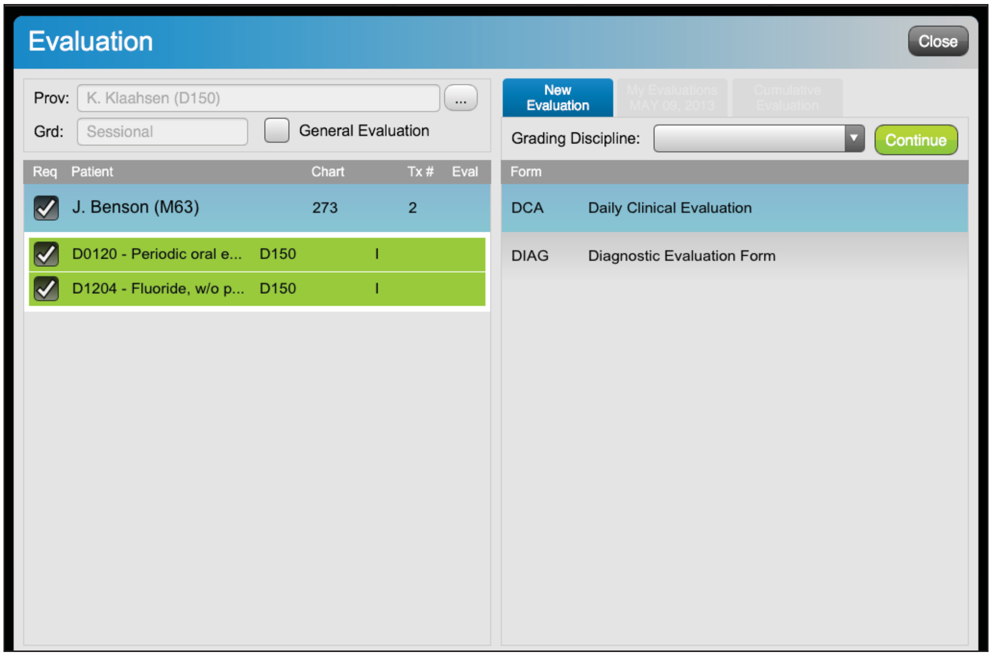
Entering Sessional Evaluations

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.

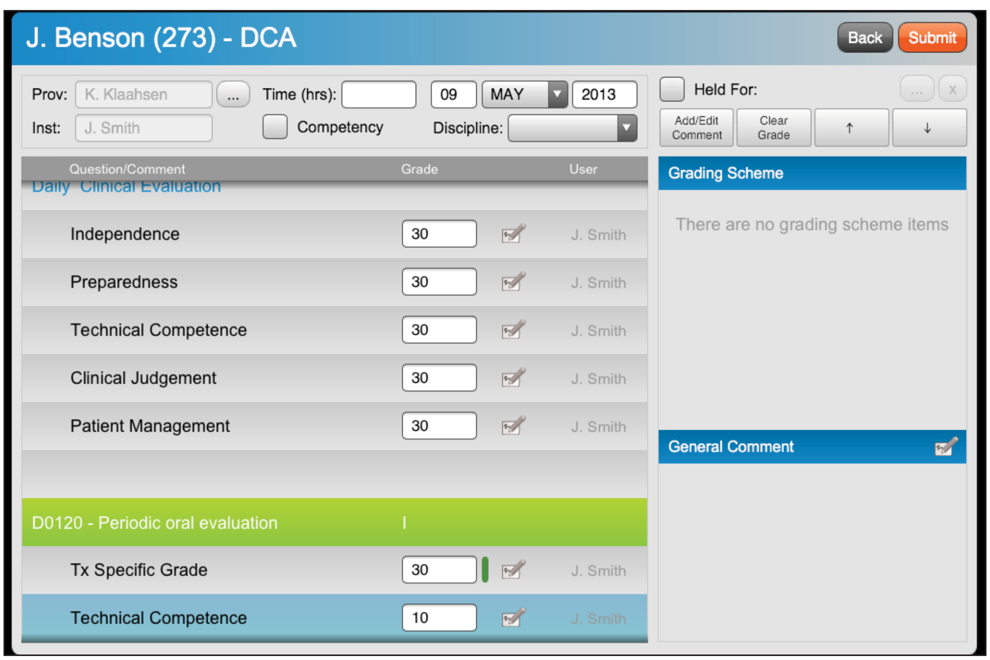
   The Evaluation selection details page is displayed.



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

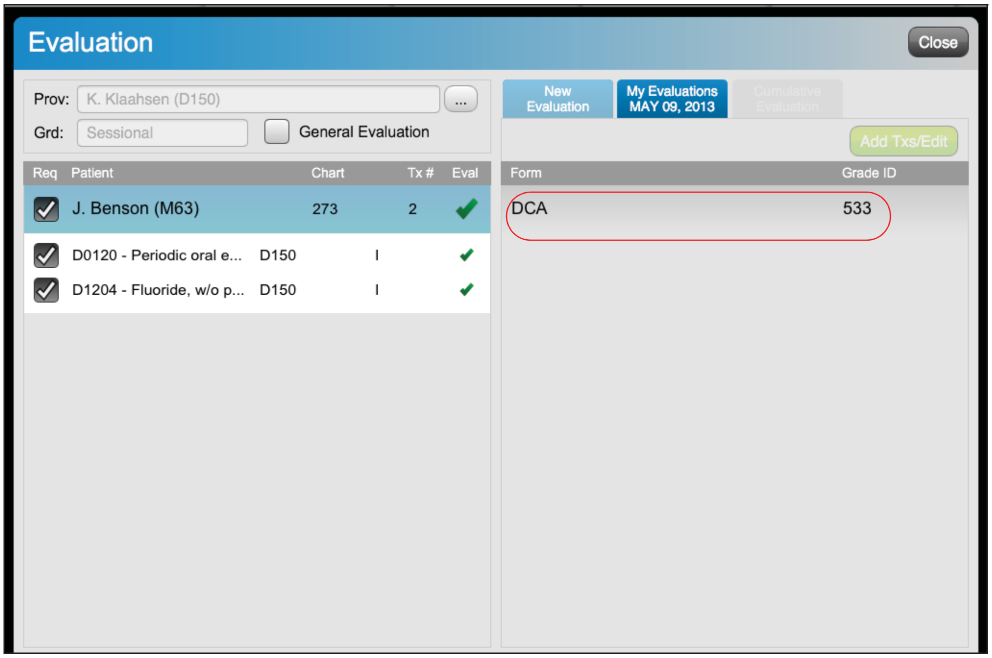
   The Evaluation grading form appears.

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.



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.

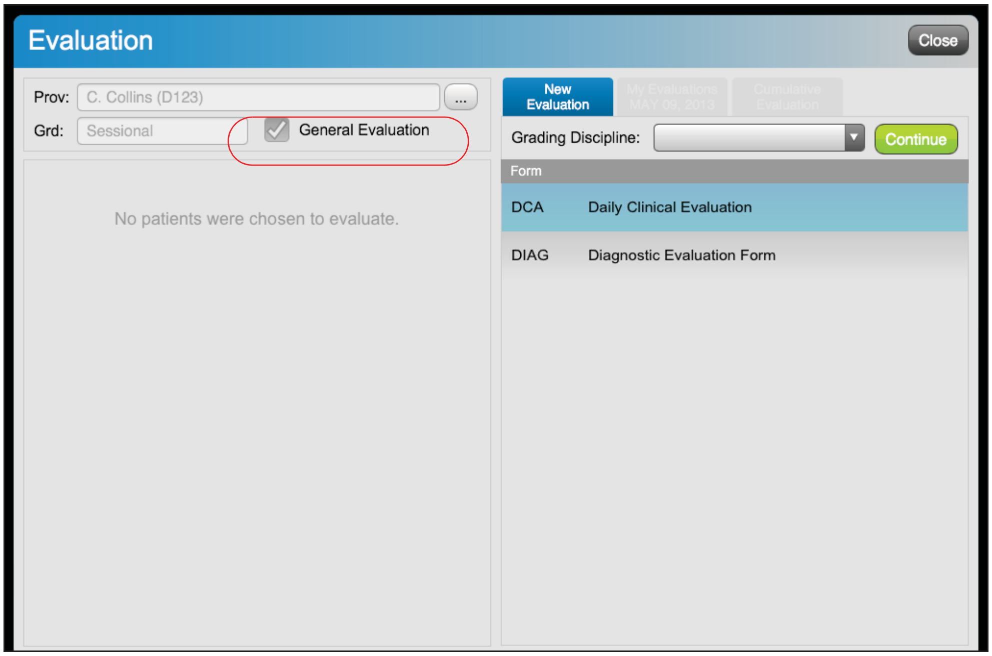
▼To enter a general evaluation:

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

   The My Providers page is displayed.

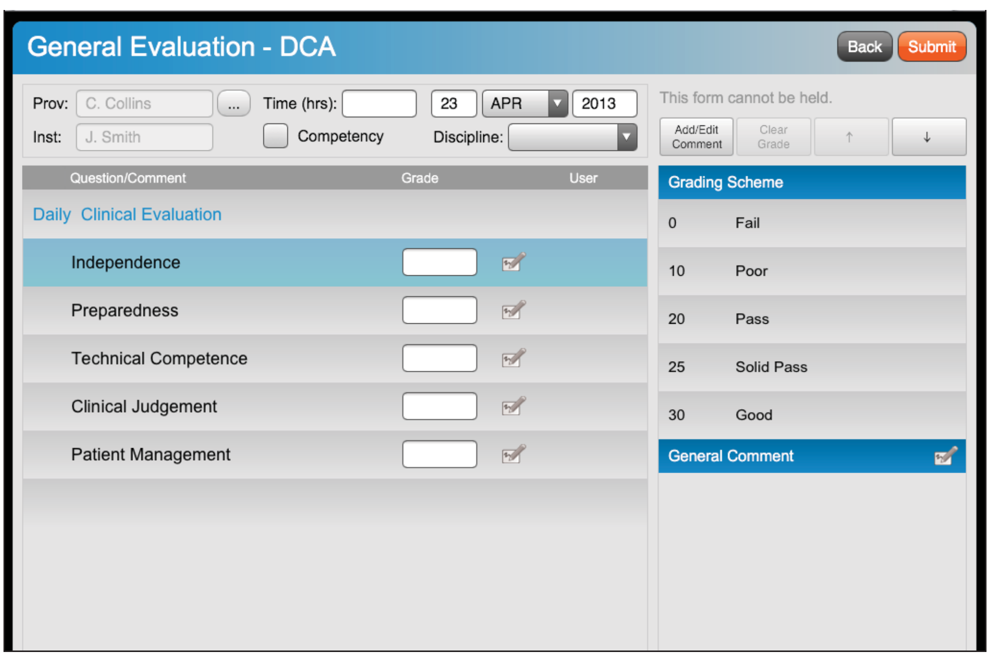
2. Tap a provider record, and then tap **Evaluate**.

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

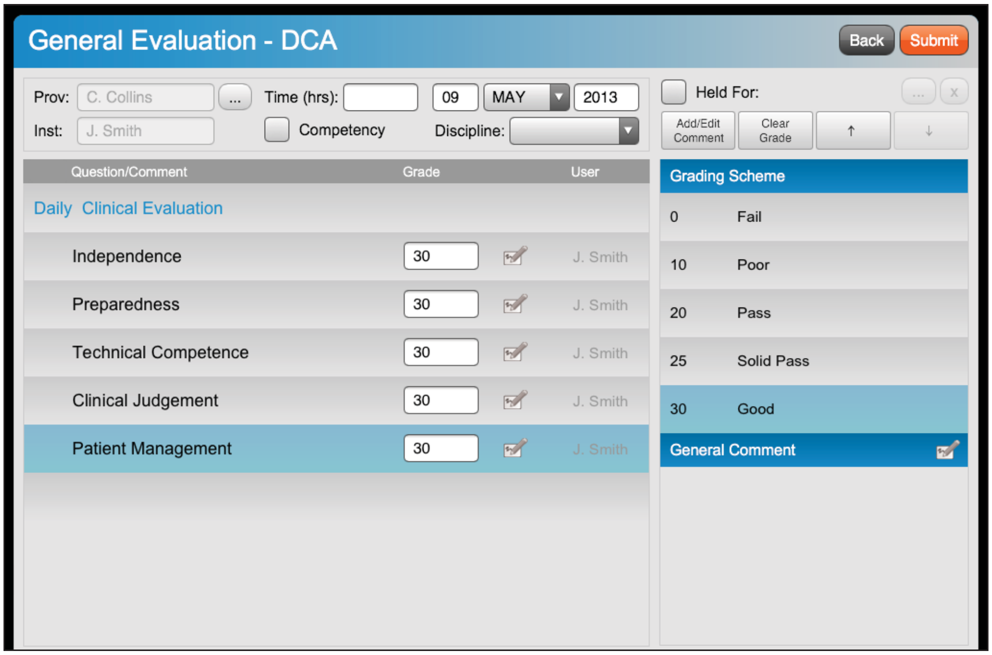


3. Tap **Continue**.

The General Evaluation grading form appears.



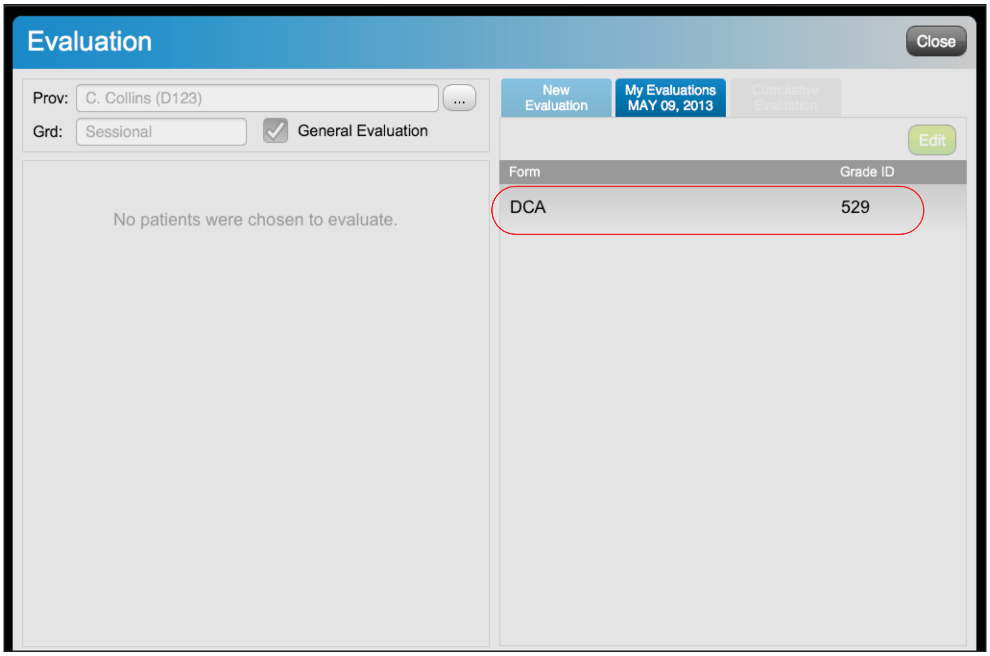
4. Tap each of the **Grade** boxes, and using the **Grading Scheme**, tap a grade.



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.



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.

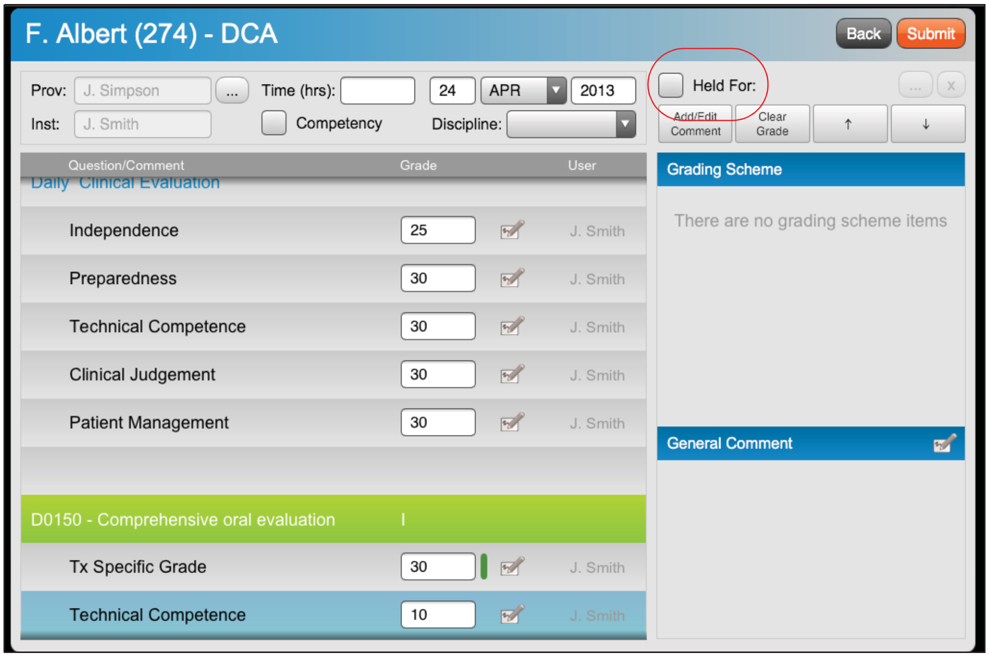
Holding Evaluation Forms

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:

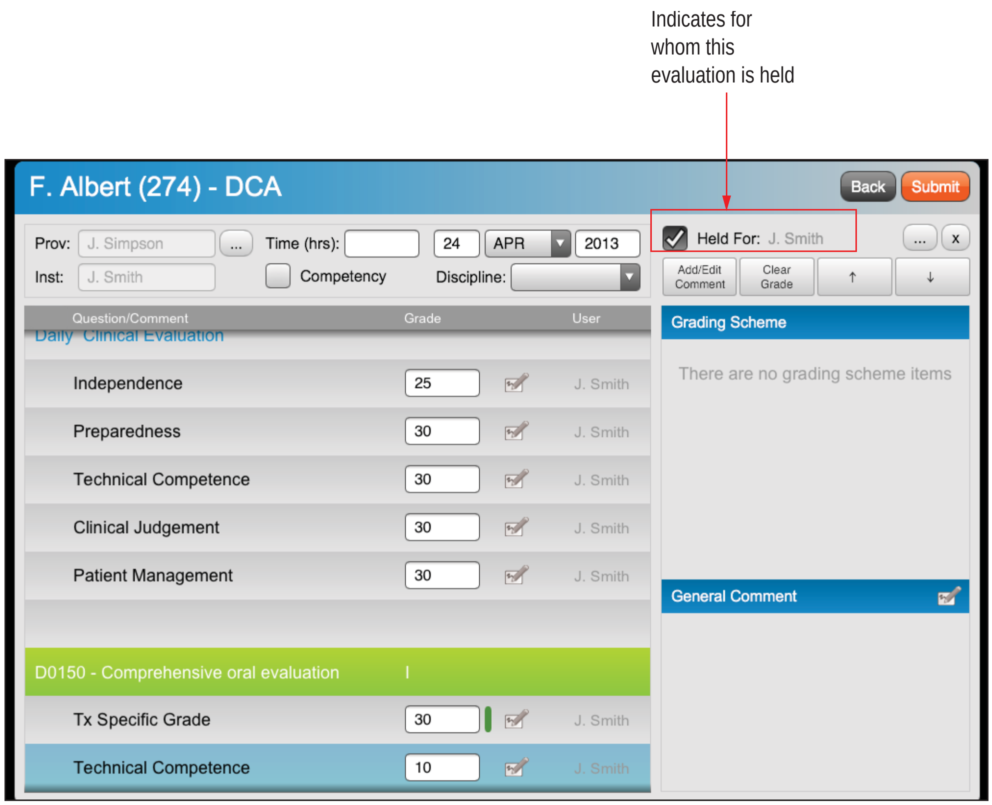
1. Create a new evaluation form.

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



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

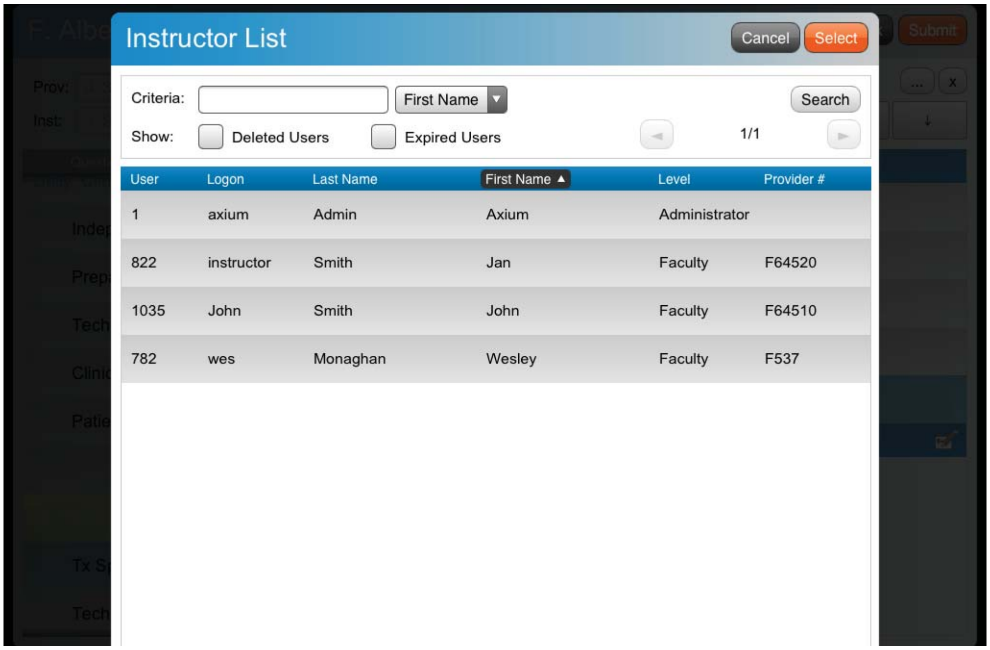
   Exan FacultyAccess displays your name, by default, (i.e. the current instructor).



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

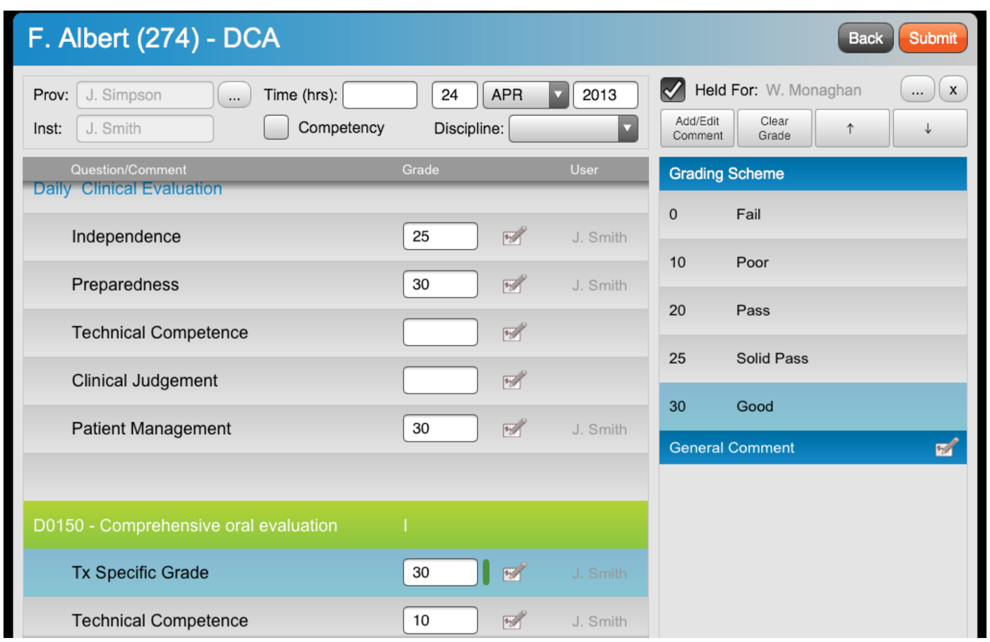
3. Tap the **Held For** (...) (**ellipsis**).

Exan FacultyAccess displays the Instructor List pop-up.



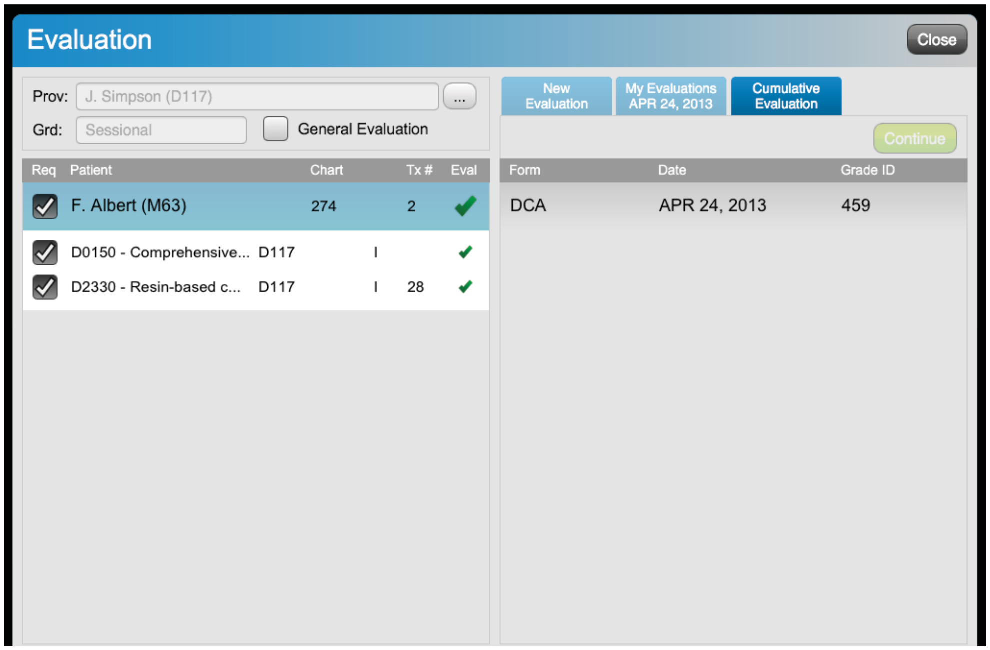
4. Enter a name in the **Criteria** box, and tap **Search**.
5. Tap a record. For example, we will select instructor **Wesley Monaghan**.
6. Tap **Select**.

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

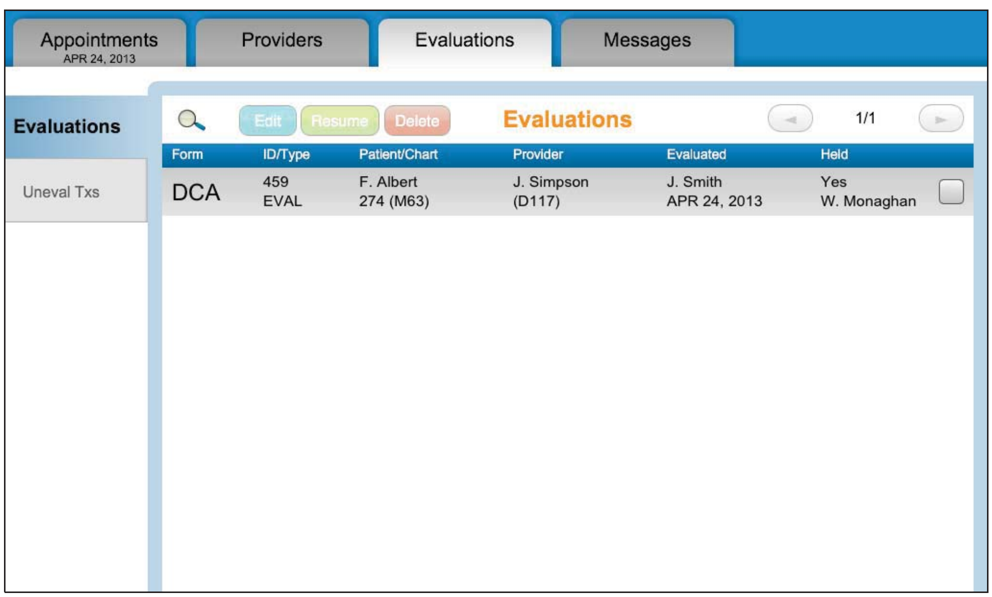


7. Tap the **Submit** button.

Exan FacultyAccess submits the form.



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.

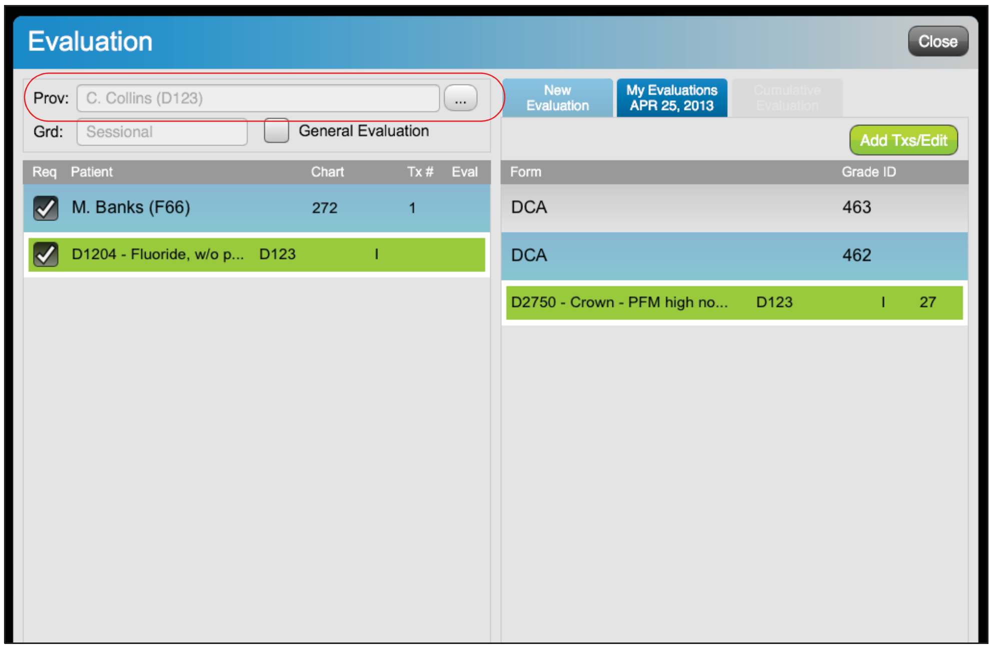


Changing Provider After Entering a New Evaluation

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:

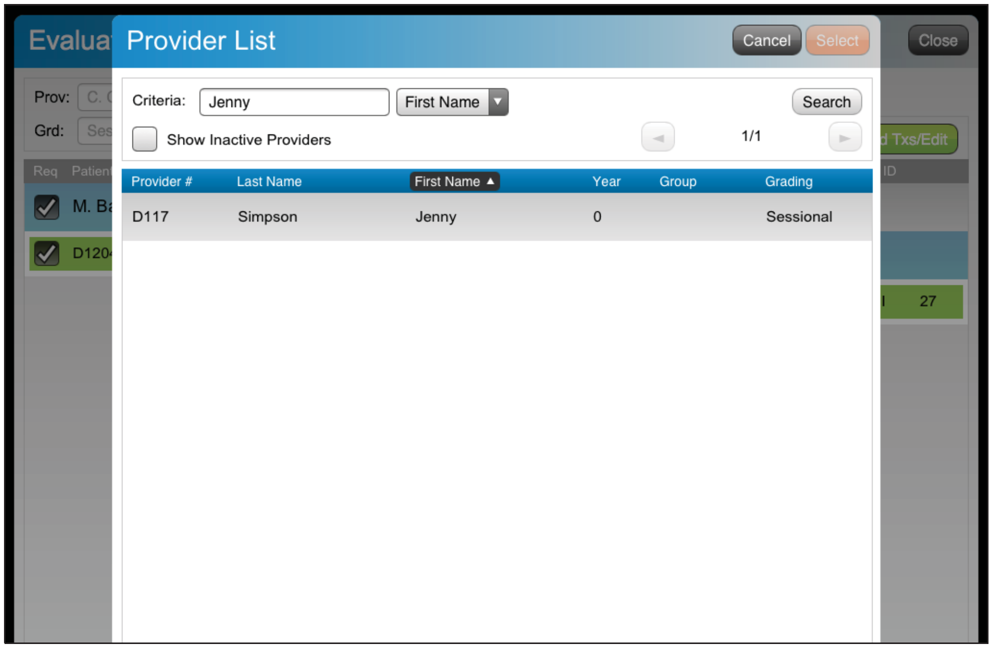
1. On the **Evaluation** form selection page, tap the ... (**ellipsis**) next to the **Prov:** box.



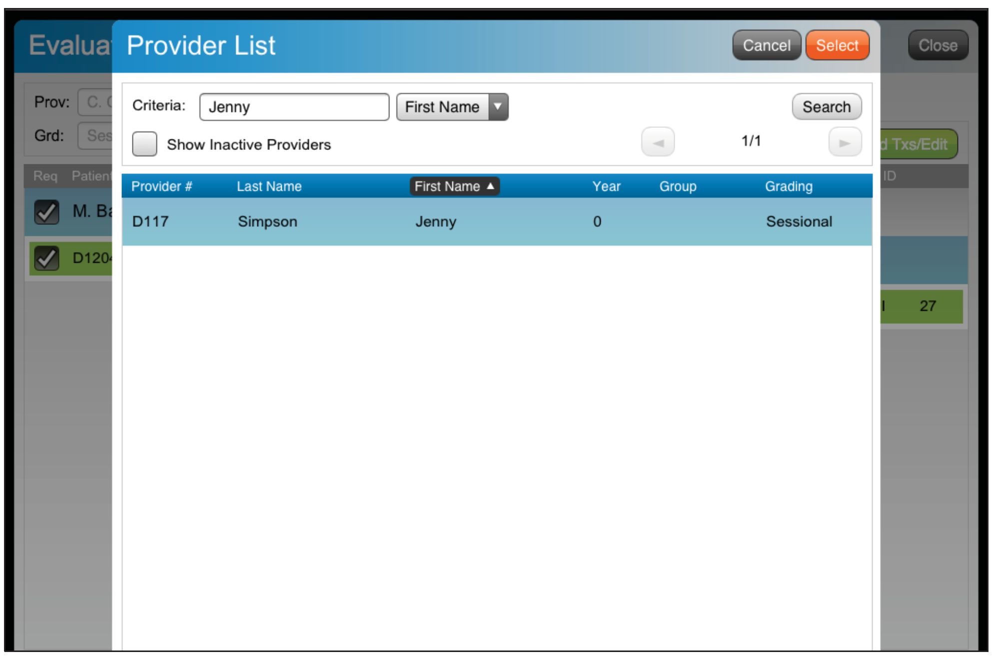
A list of providers is displayed.

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

   The search results are returned.

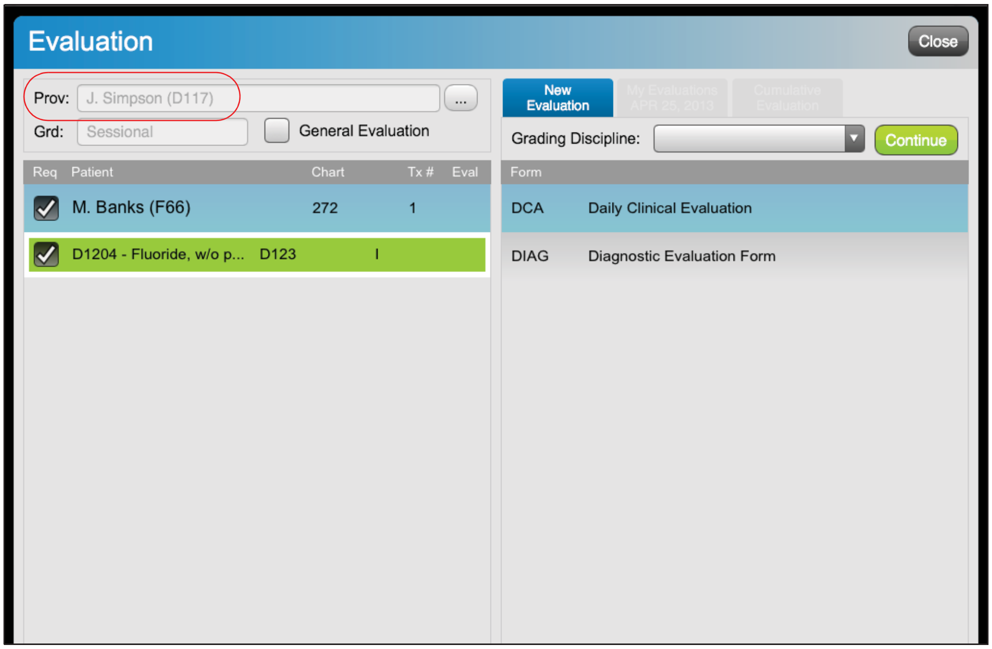


3. Tap the required provider record to highlight it.



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

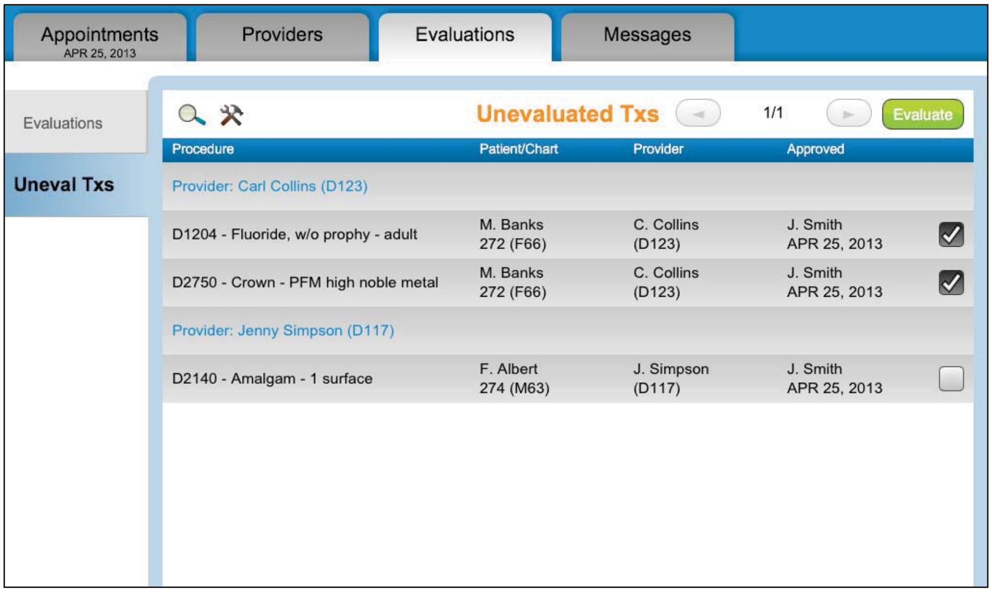
A cumulative evaluation refers to treatments that are evaluated multiple times. This is when a faculty member must continue marking the original cumulative form. Procedures are set up for cumulative evaluations in axiUm.

▼To enter a cumulative evaluation form:

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

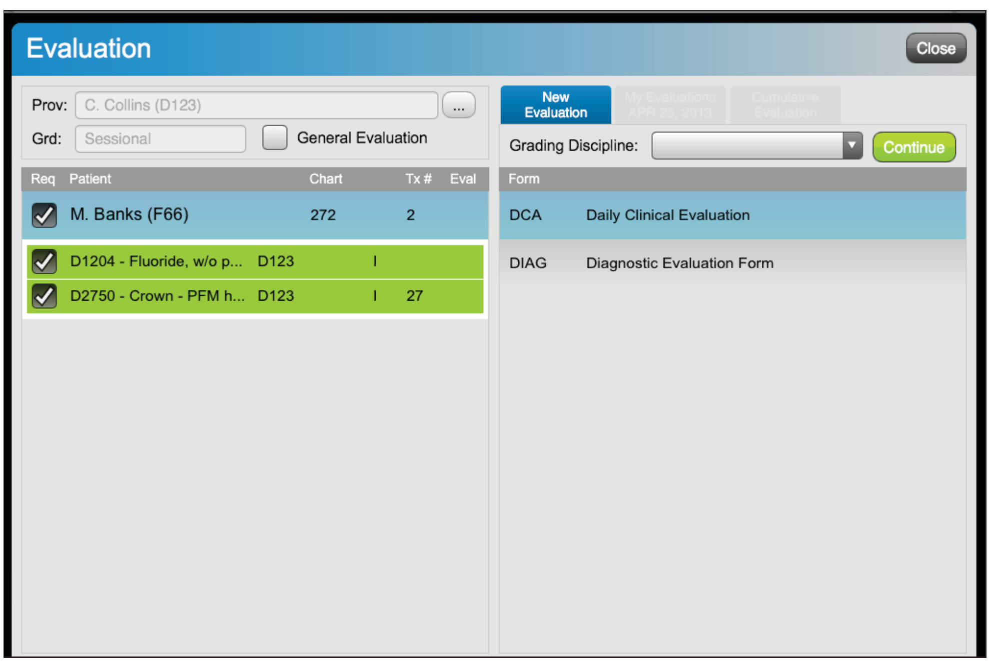
   Exan FacultyAccess displays all unevaluated treatments for today.

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



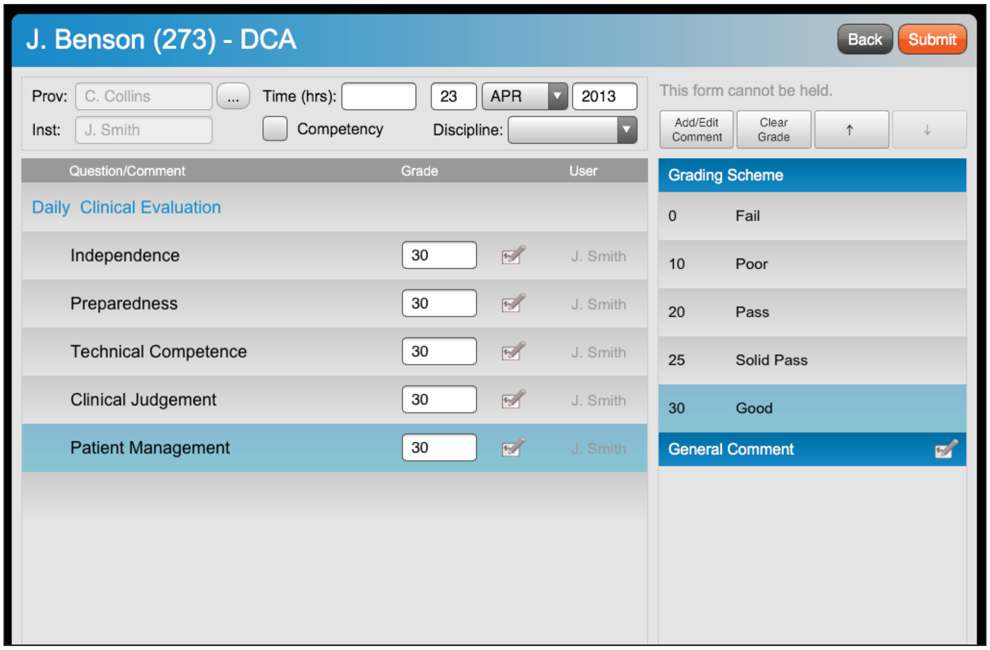
3. Tap **Evaluate**.

   Exan FacultyAccess displays the Evaluation form selection page.



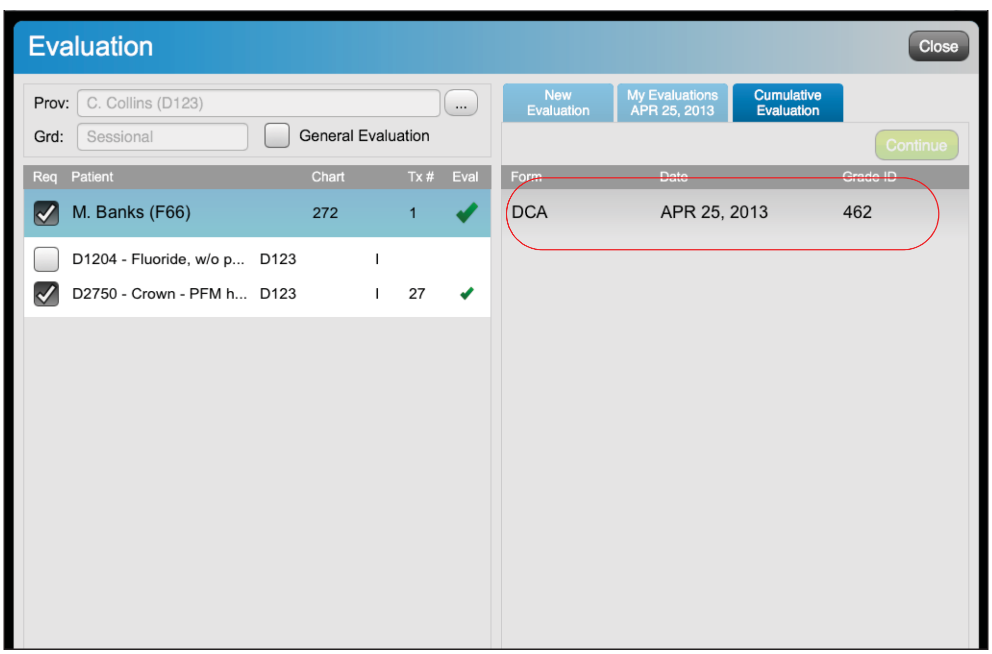
4. Ensure that the **New Evaluation** tab is selected.
5. Tap an evaluation form that is cumulative. For example, we will select the DCA form.
6. Tap **Continue** to display the evaluation form.

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

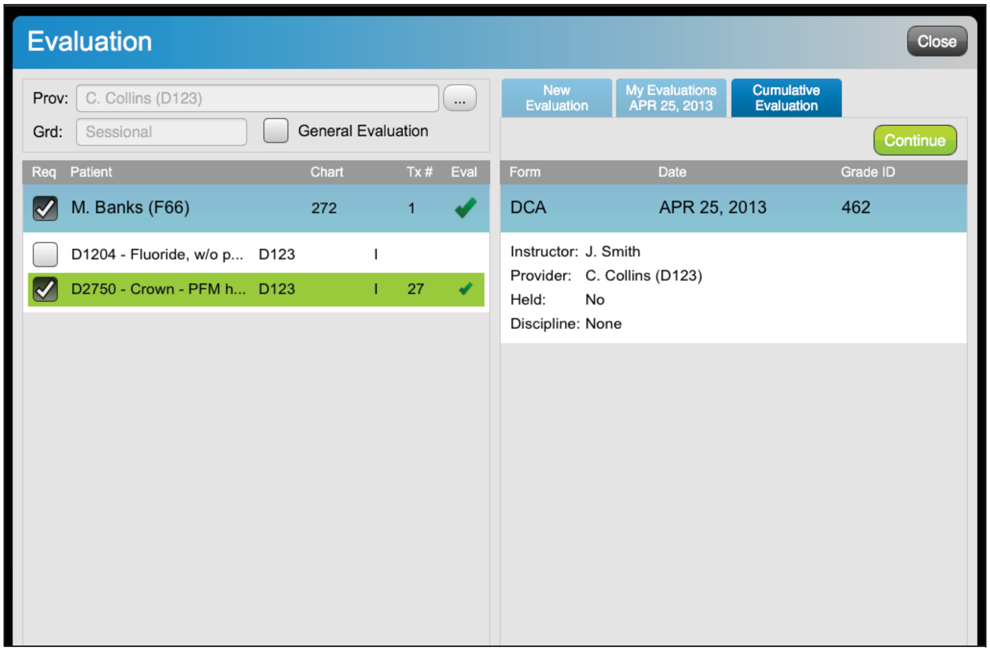


8. After you have finished entering grades, tap **Submit**.

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.



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

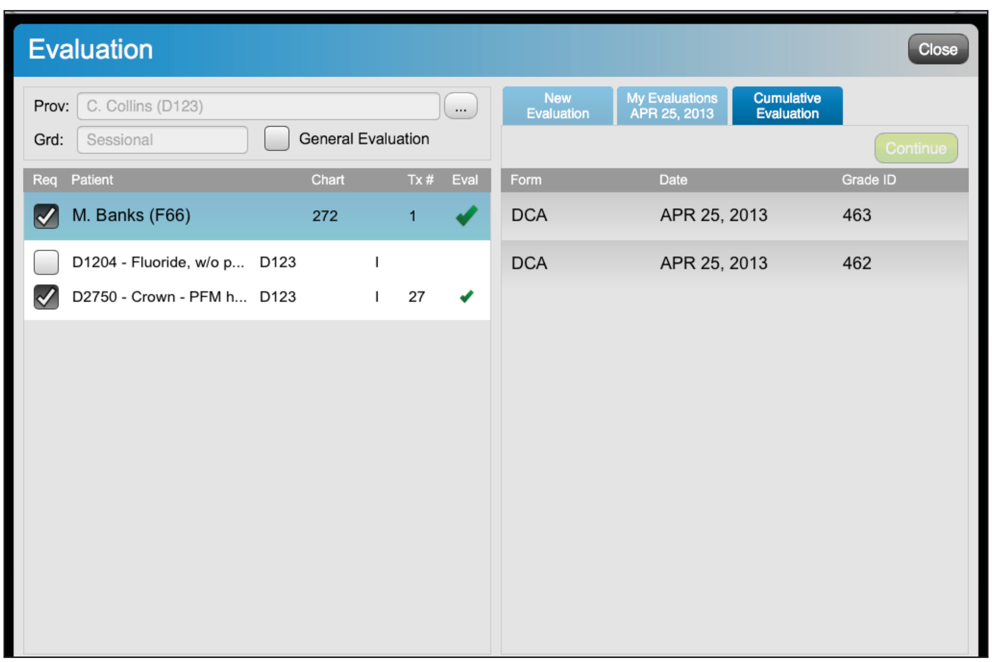


10. Tap **Continue** to perform another evaluation on the same treatment.

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,



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.

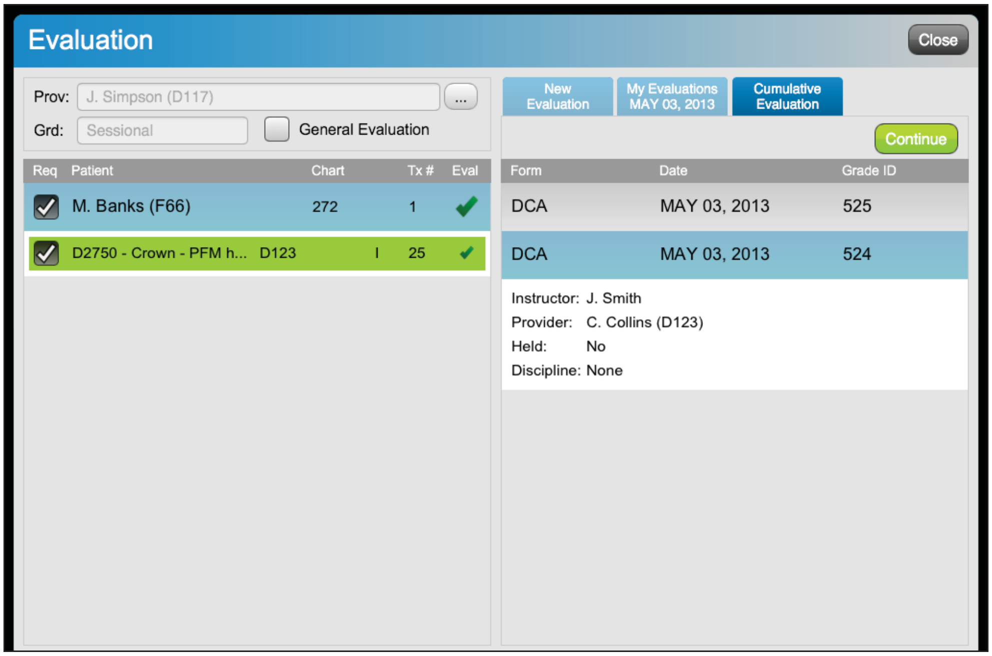
Viewing Details and Reusing Answers on Cumulative Evaluation Forms

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:

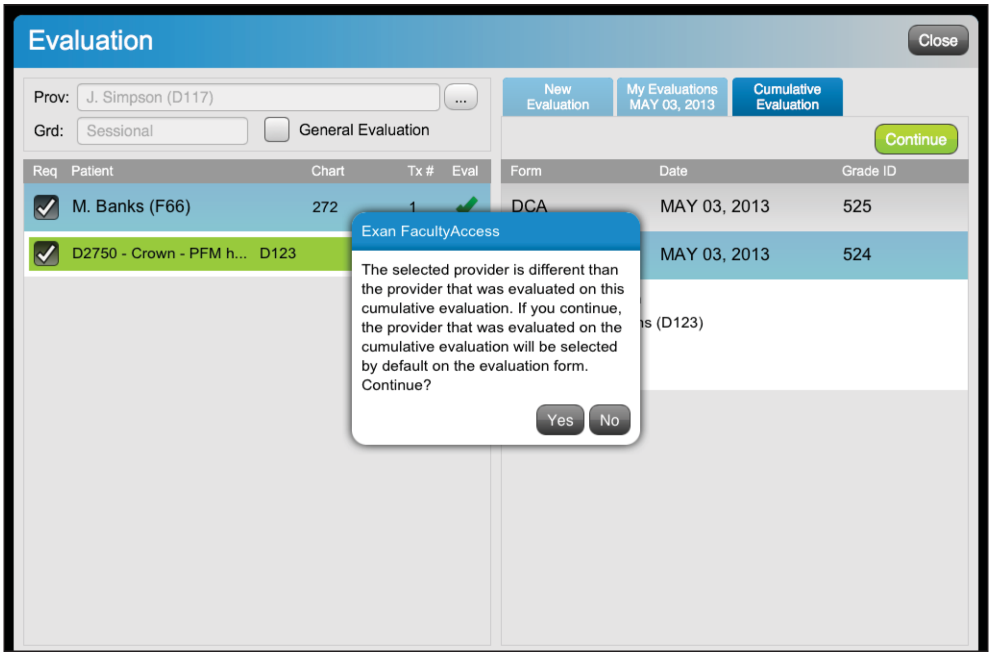
1. On the **Evaluation** details form, tap one of the cumulative evaluations.



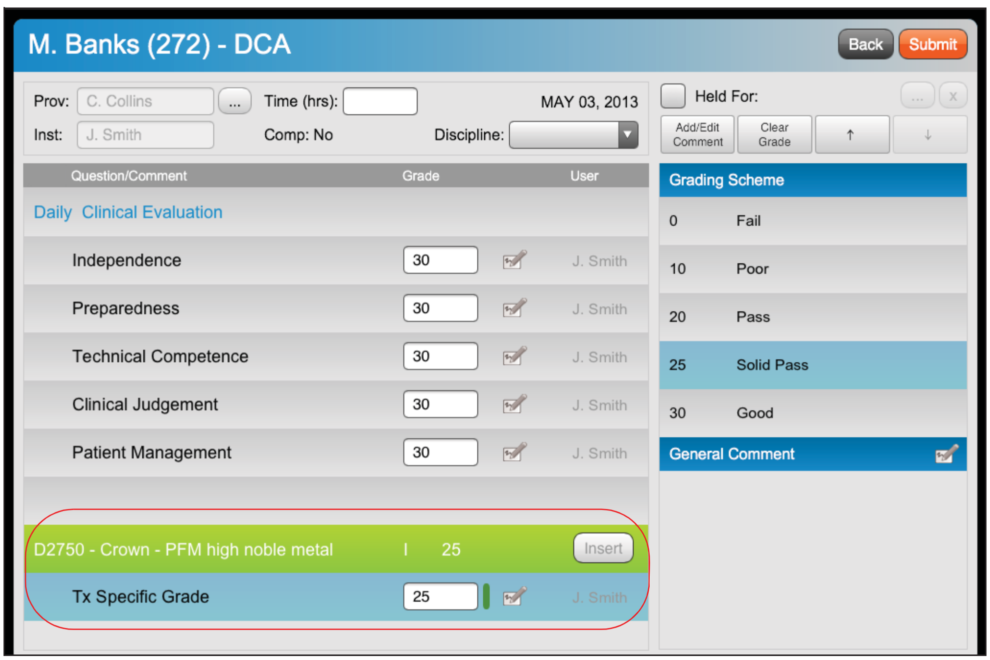
In this example, we will reuse answers entered on previous cumulative forms.

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.

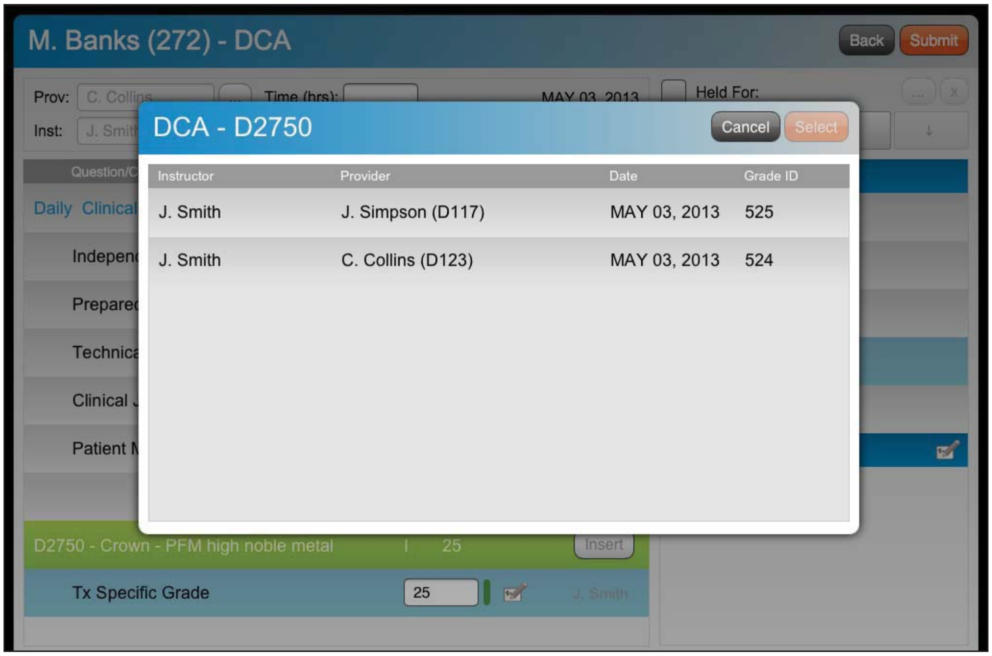


3. Tap **Yes**.

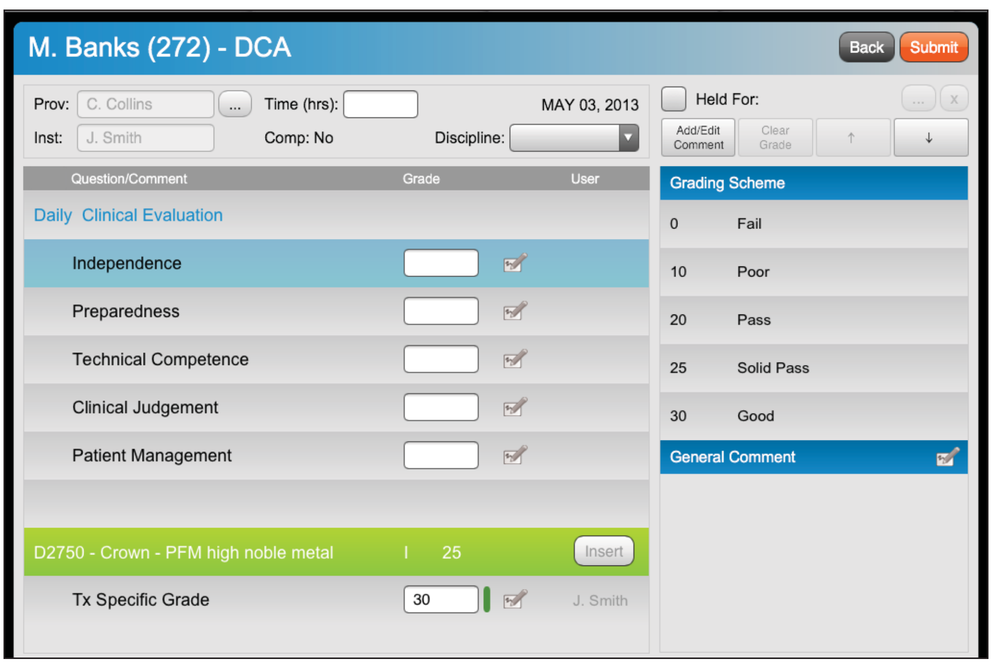


4. Go to the specific treatment question, and tap the **Insert** button.

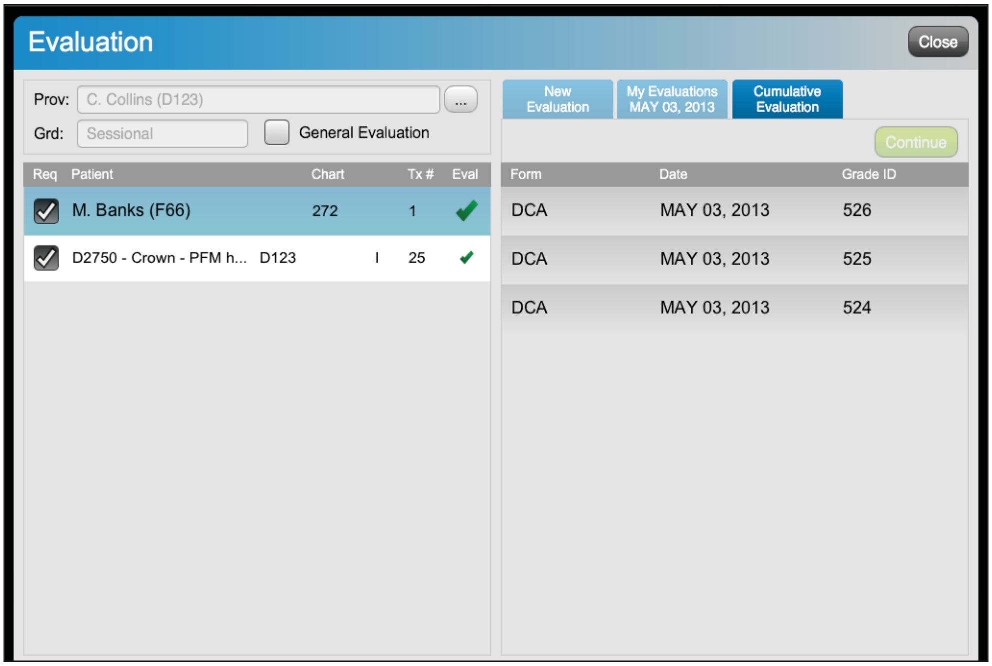
   A summary of the previous answers for the specific treatment question is displayed. The specific treatment question pop-up below shows two previous answers on the cumulative form.



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



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

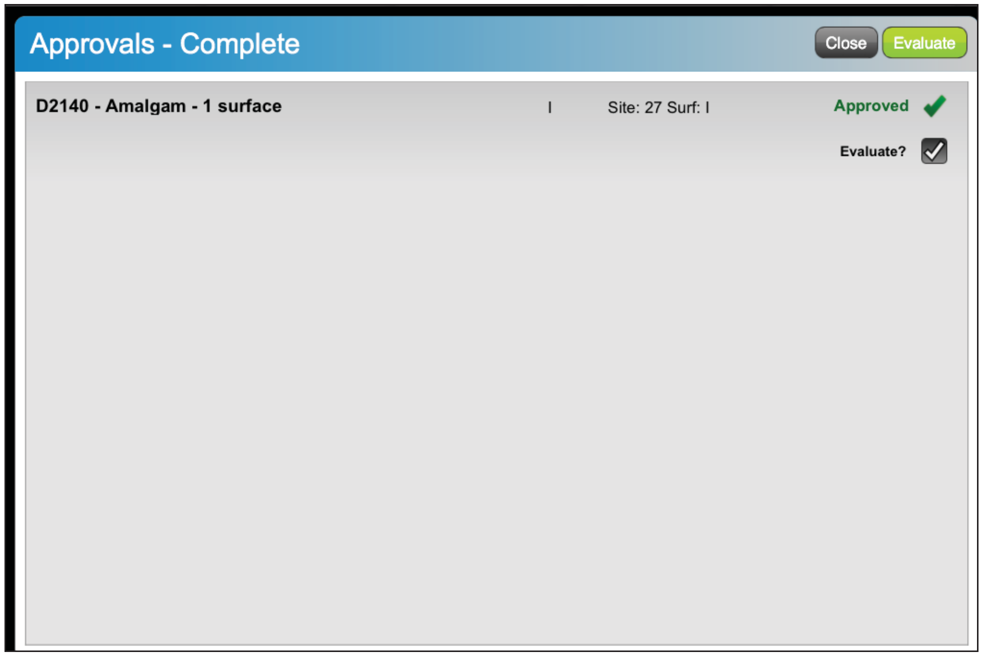


Adding Treatments to Existing Evaluations

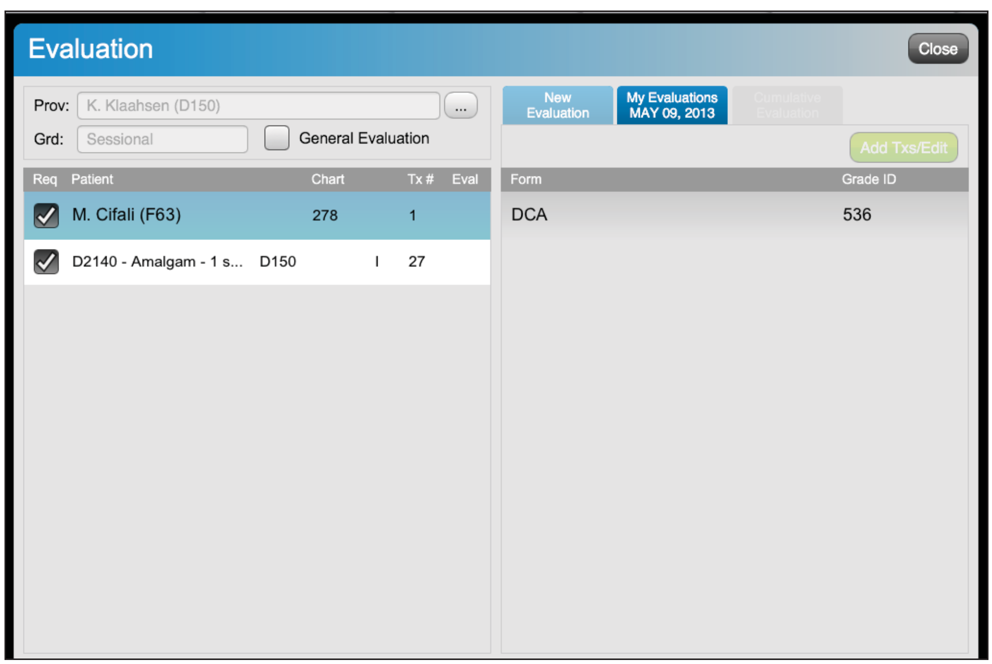
As a provider completes treatments for a patient, you can add these treatments to the same evaluation form. For example, a provider has performed several procedures on a patient. You have already evaluated one procedure and will add another procedure to the same evaluation.

▼To add a treatment to an existing evaluation:

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

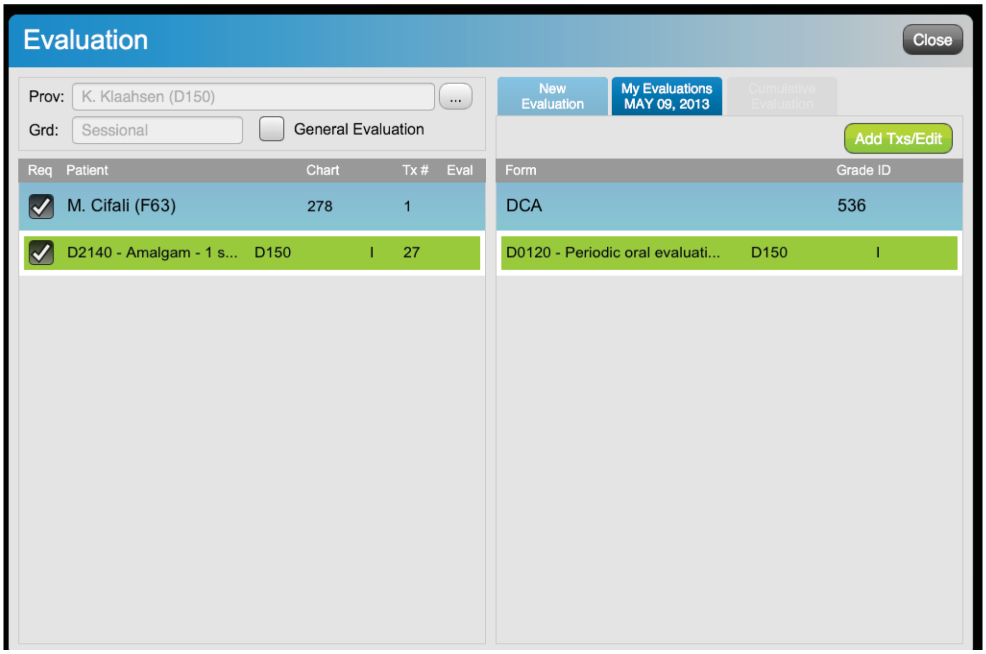


Exan FacultyAccess displays the Evaluation form selection page.



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

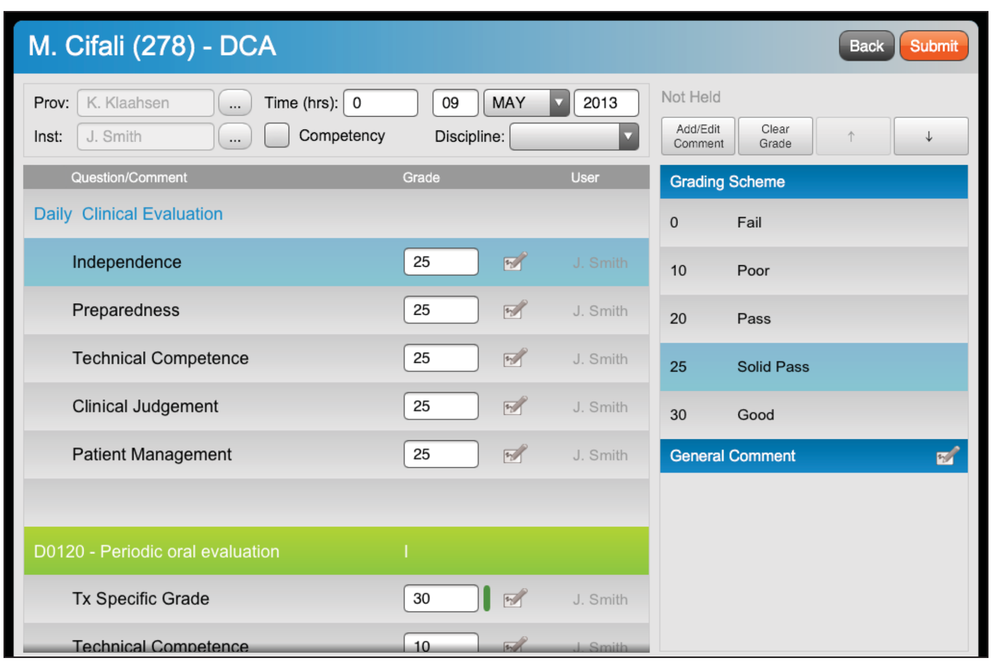
2. In the **My Evaluations** tab, tap an existing grade form to which you want to add the procedure. For example, we will select DCA, Grade ID 536.



3. Tap **Add Txs/Edit**.

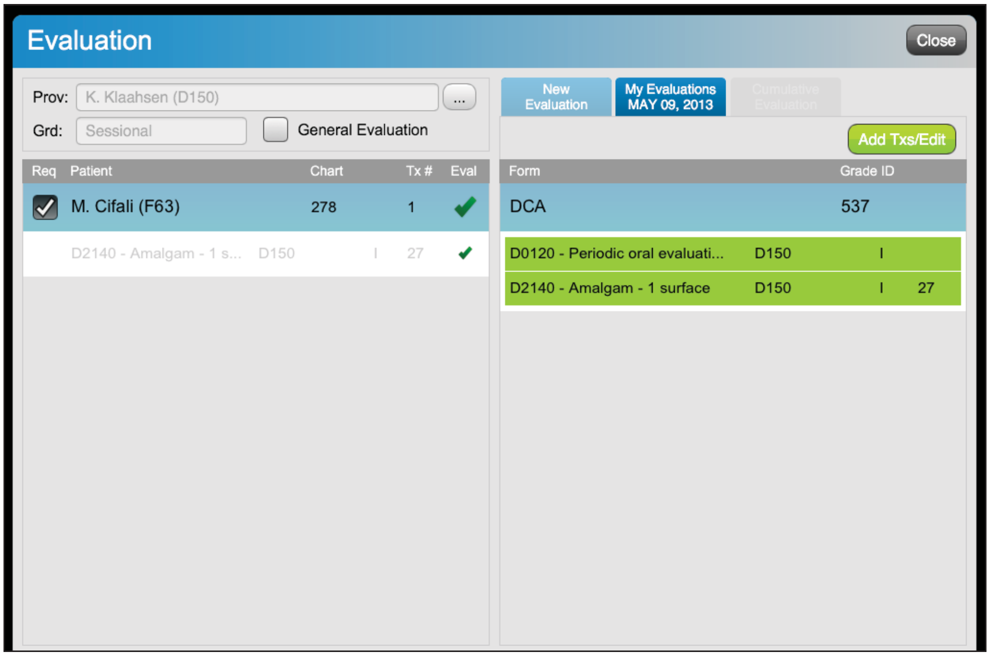
The evaluation form is displayed.

4. Enter the grades for the added treatment.



5. Tap **Submit**.

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



3.3 Viewing Completed Evaluations

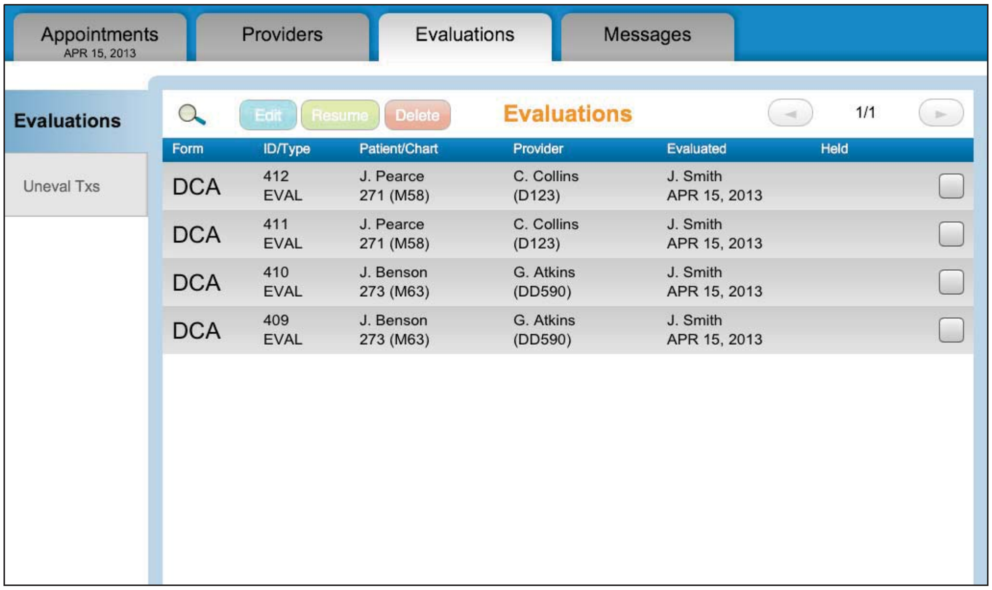
After you have completed evaluations, you can:

- 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.

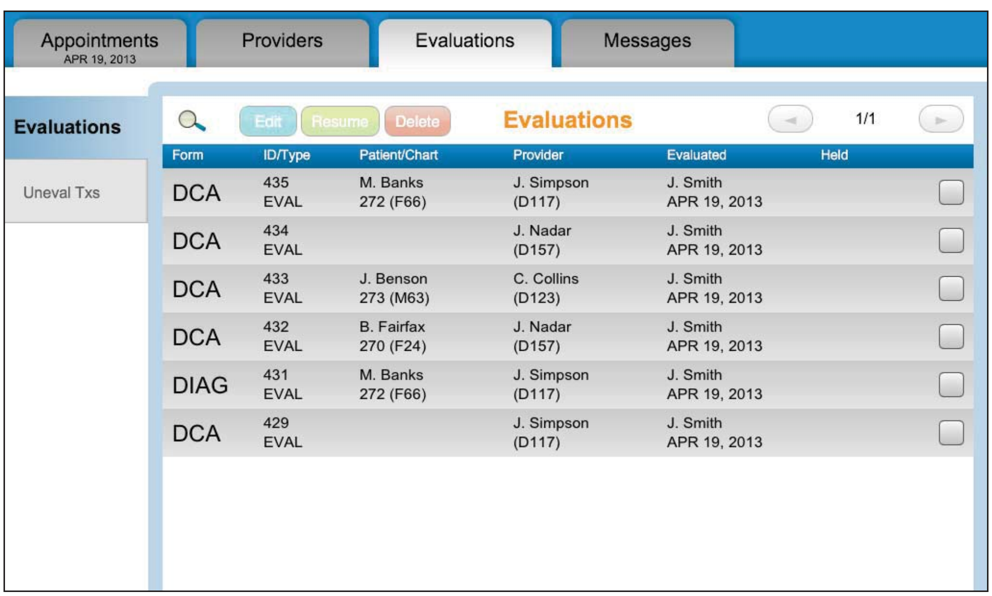


Editing Evaluation Forms

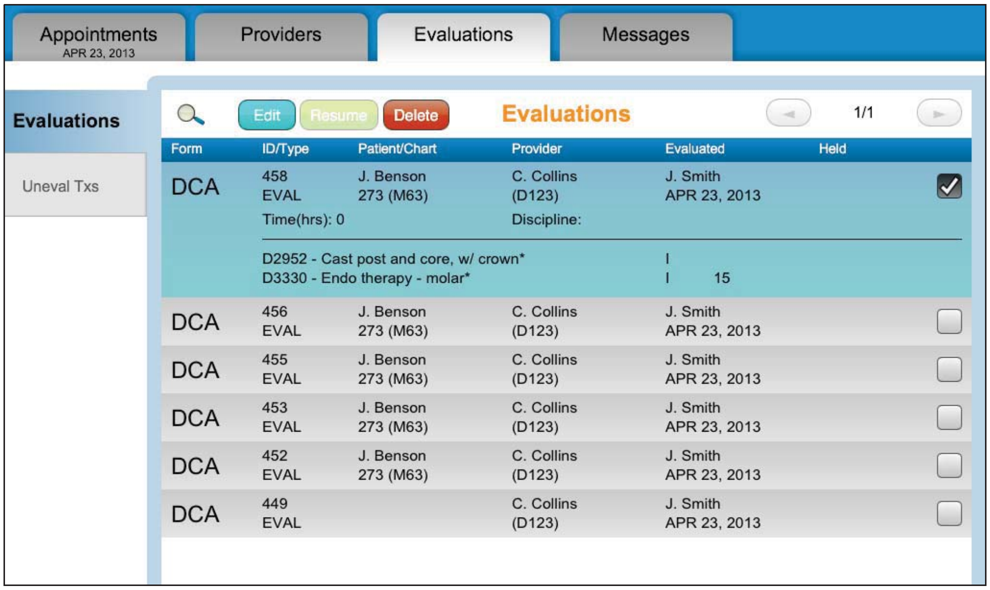
▼To edit an evaluation form:

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

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



2. Tap a check box next to an evaluation that you want to edit.



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

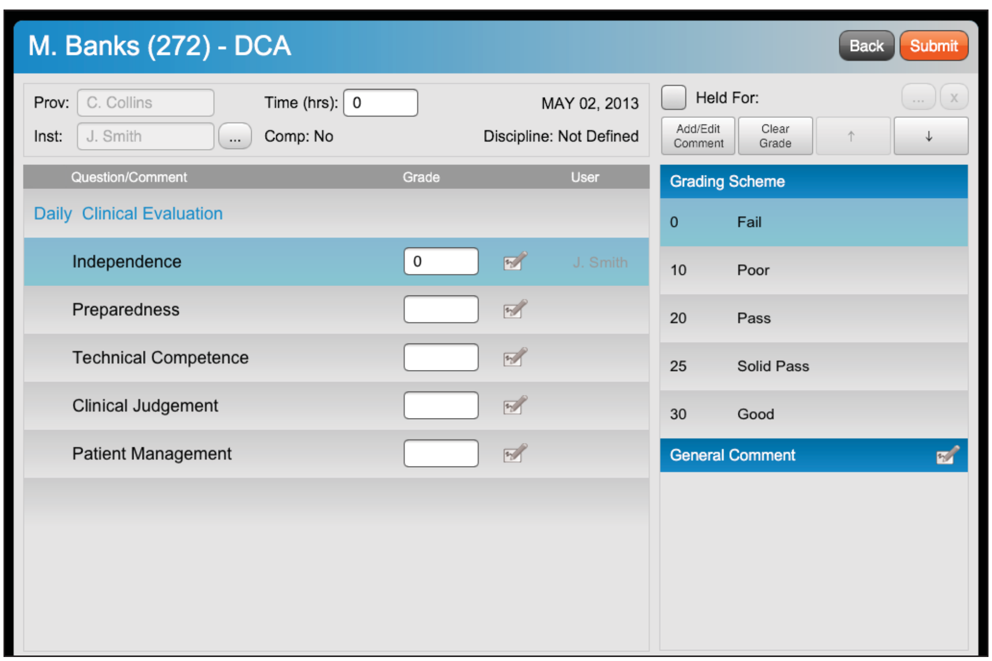
Resuming Held Evaluation Forms

▼**To resume a held evaluation form:**

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

Held evaluation forms are those records in the Evaluations tab with the Held column displaying Yes. In the above example, instructor Wesley Monaghan wants to resume evaluating provider J. Simpson.

2. Tap a check box next to a held evaluation, and tap **Resume** to resume grading this form.



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

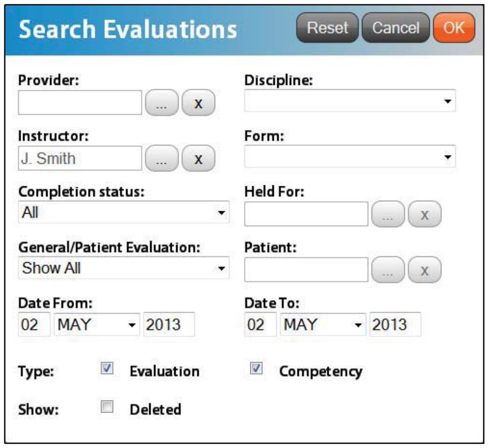
You can perform a search on evaluations for all providers, or for a specific provider and/or for a specific instructor to display a list of:

- 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.



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**.

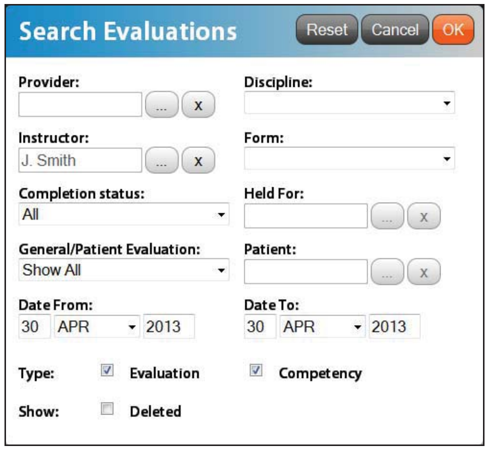
   The Search results are returned on the Evaluations page.

Searching General Evaluations

▼To Search General Evaluations:

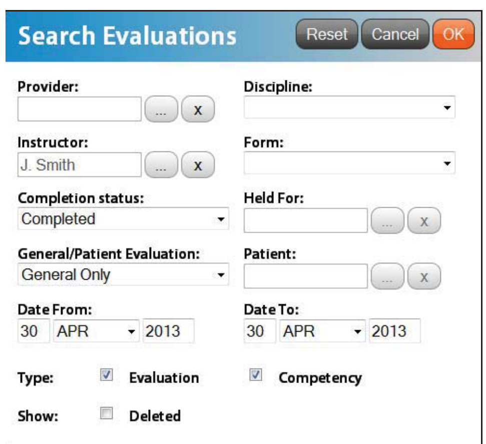
1. On the **Evaluations** page, tap the  (**Search Evaluations**) icon.

   The Search Evaluations pop-up appears.



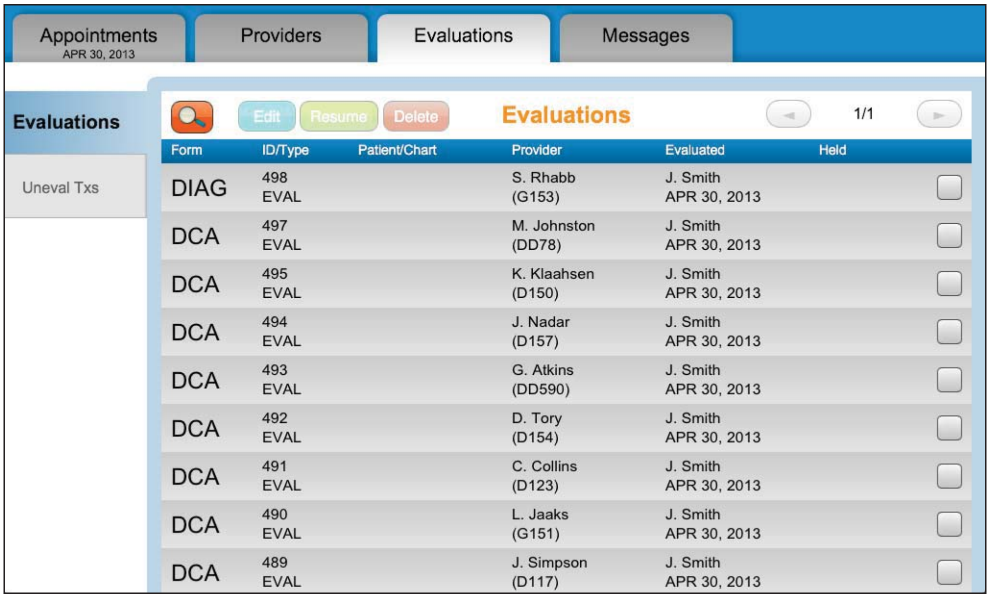
For this example, we will display a list of all completed general evaluations for the day.

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



4. Tap **OK**.

   A list of completed general evaluations is displayed.

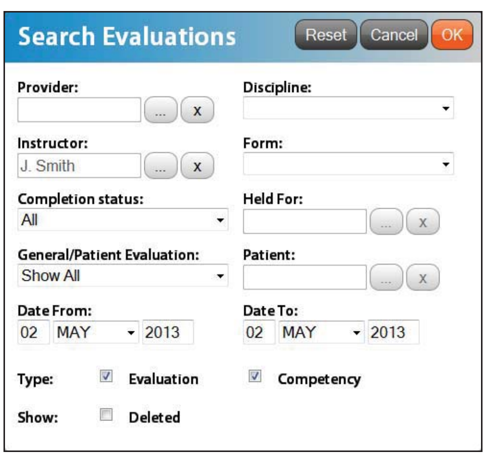


Searching Held Evaluations

▼To Search for Held Evaluations:

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

The Search Evaluations pop-up appears.



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`.

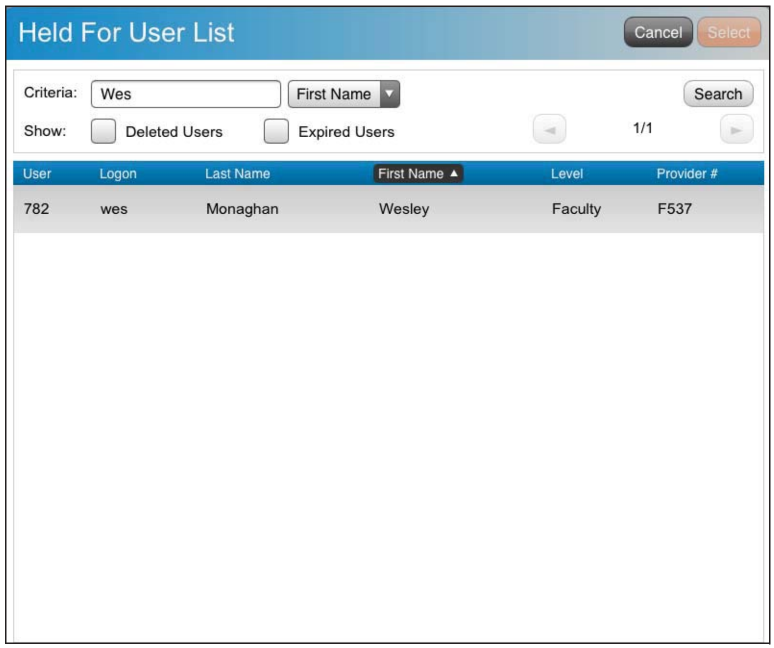
3. From the **Held For** area:

3.1. Select the  **(ellipsis)**,

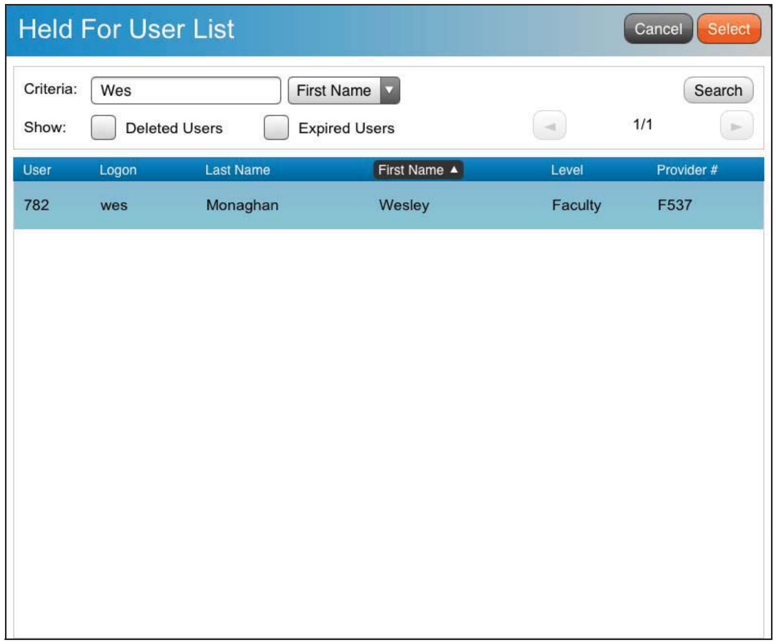
3.2. Type a first name in the **Criteria** box, ensuring that the adjacent drop-down list displays **First Name**. For example, we will type `Wes`.

3.3. Tap **Search**.

The details of the instructor is displayed.



3.4. Tap the instructor record to highlight the record.



3.5. Tap **Select**.

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

5. Tap **OK**.

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

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.

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.

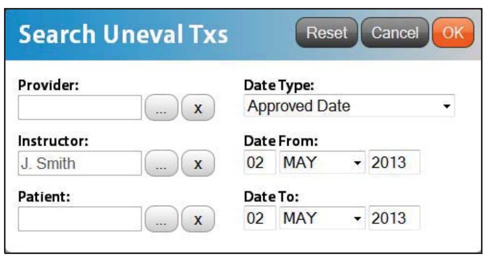
If you search by:

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

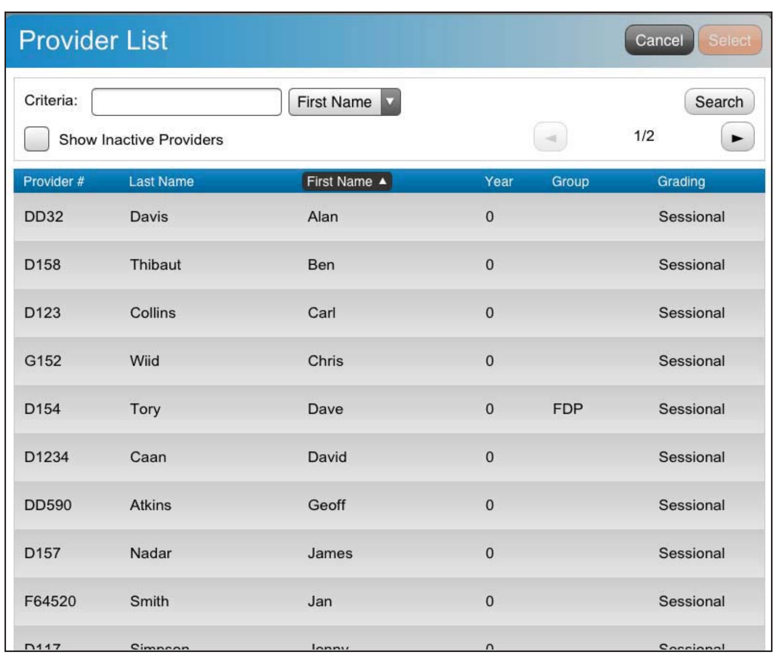
▼To search unevaluated treatments:

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

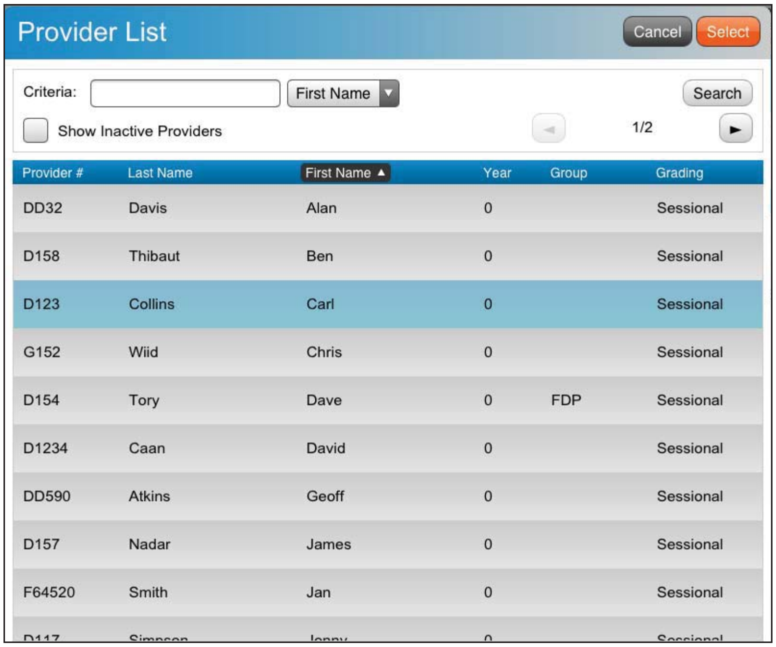
   The Search Uneval Txs pop-up is displayed.



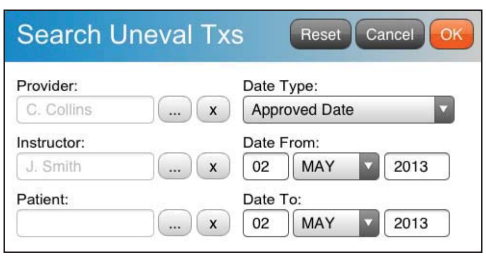
2. Tap the **Provider**  (**ellipsis**) to display the Provider List.



3. Tap a provider record.



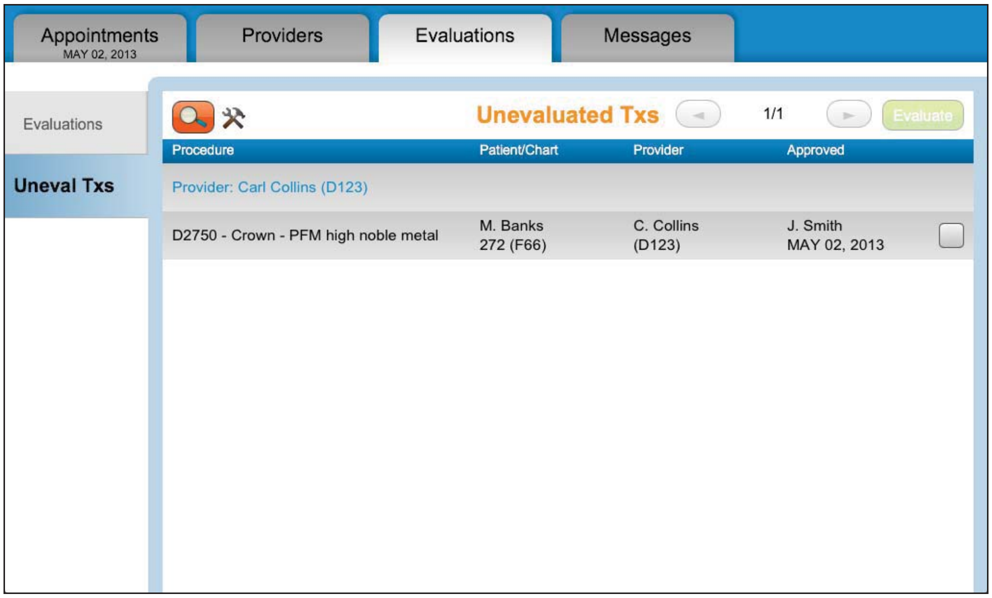
4. Tap **Select**.



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 Txs page.



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

Clearing Unevaluated Txs Search Results

▼To clear unevaluated treatment results:

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

   The Search Uneval Txs 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:

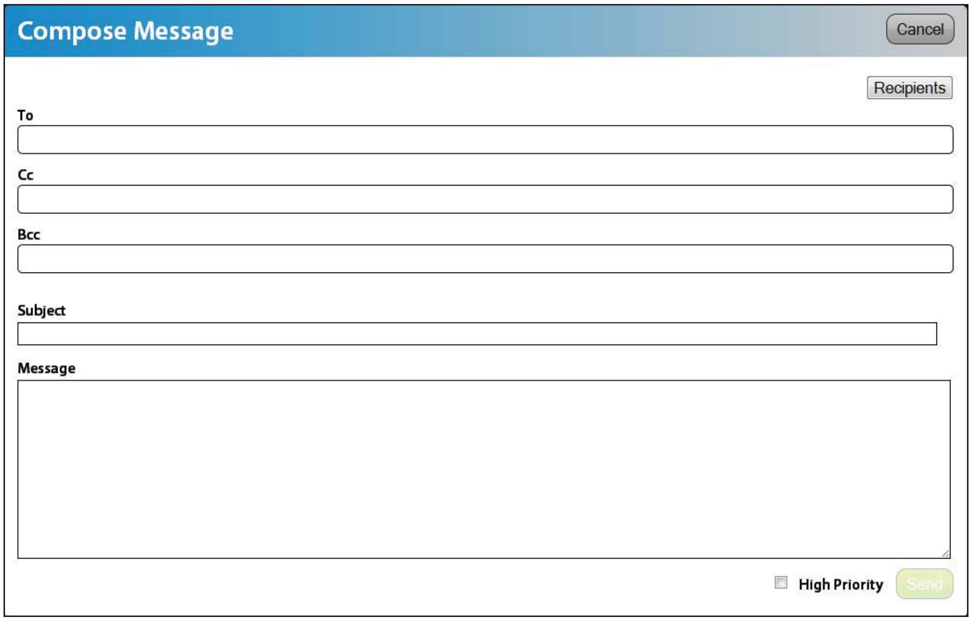
- A patient
- axiUm users
- A group

Composing a Message to a Patient

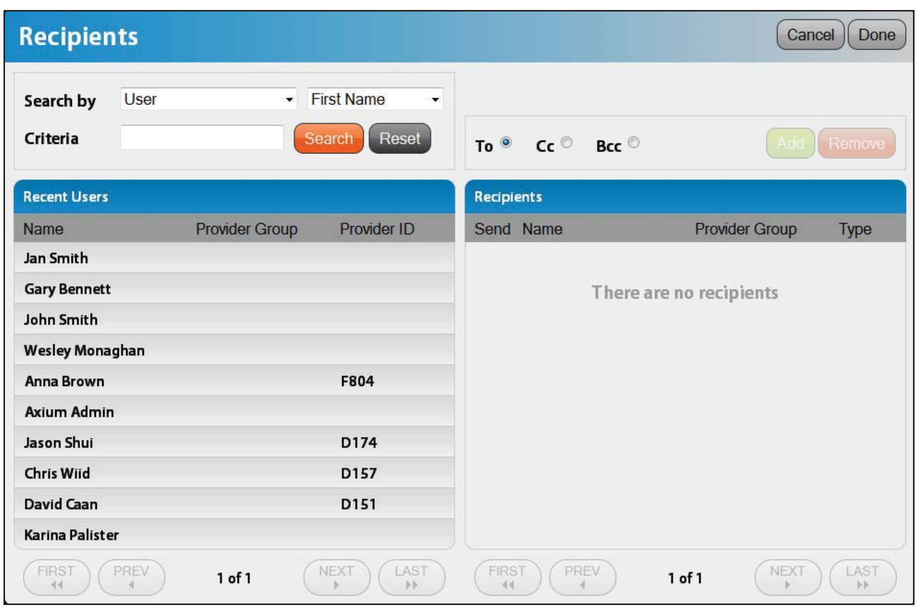
When you compose a message, you can select only one patient recipient per message.

▼To compose a message to a patient:

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

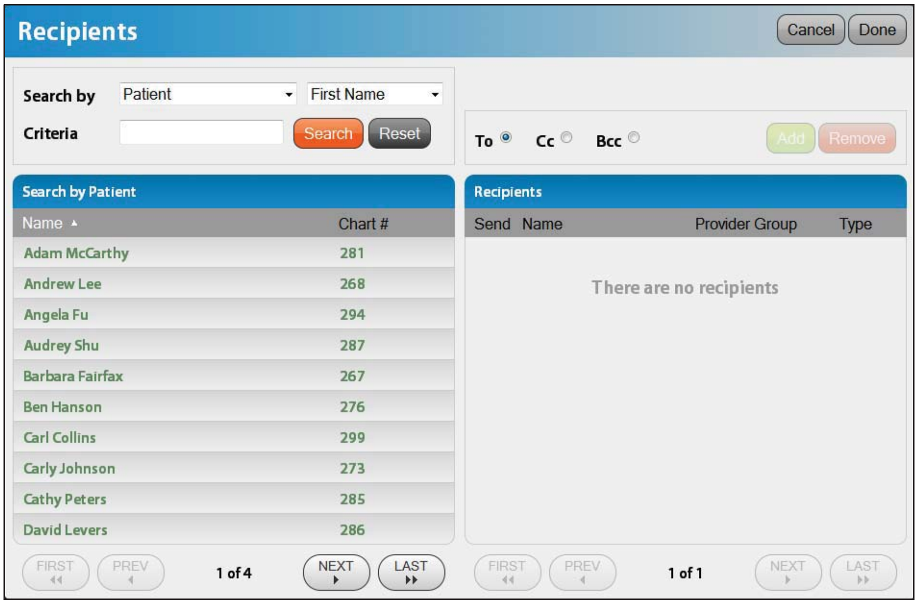


2. Tap the **Recipients** button to display the Recipients pop-up.



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.



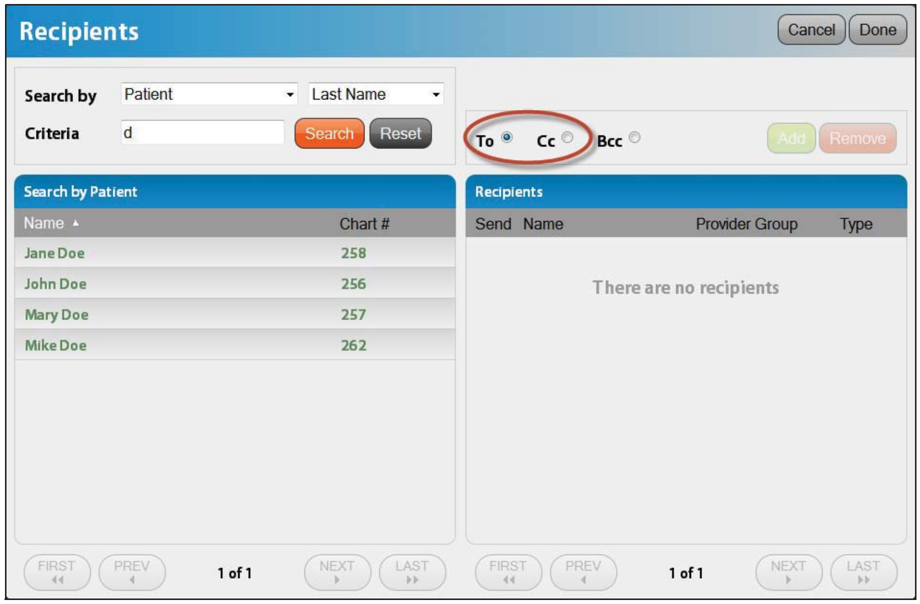
4. If the patient is not displayed in the left pane:

   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.

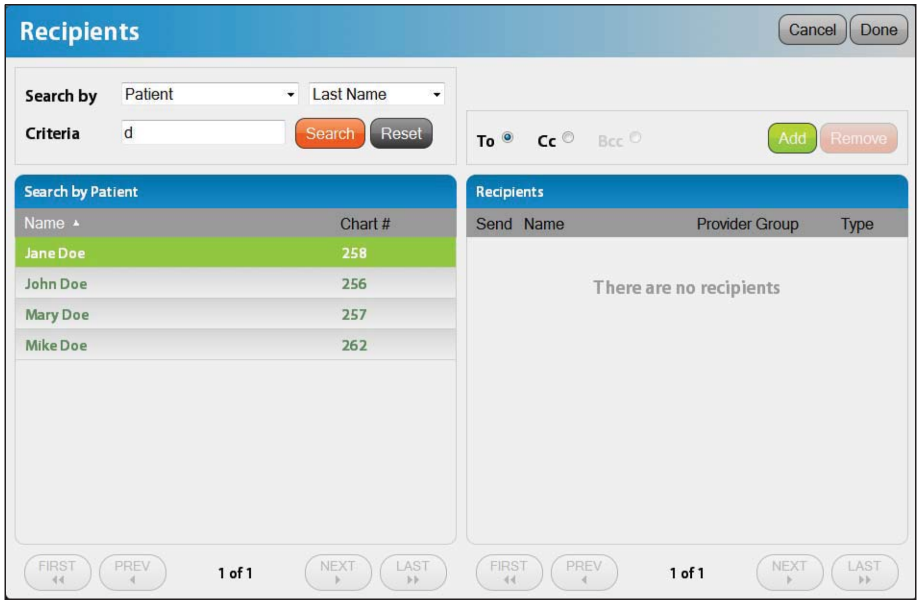
   Patients who meet the above criteria are displayed in green text.



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

> *Patients cannot be entered in the Bcc box.*

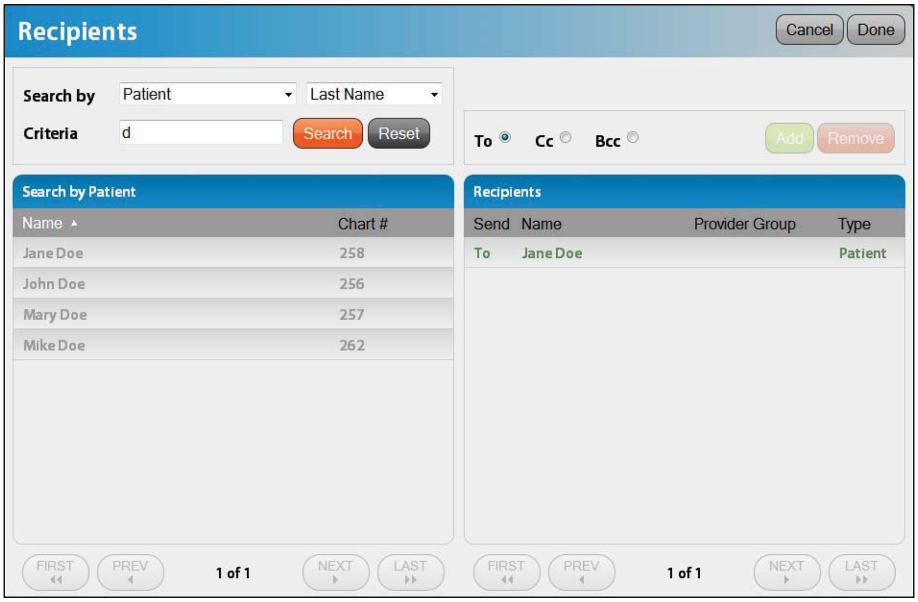
6. In the **Search by Patient** list, tap the recipient's name.



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.

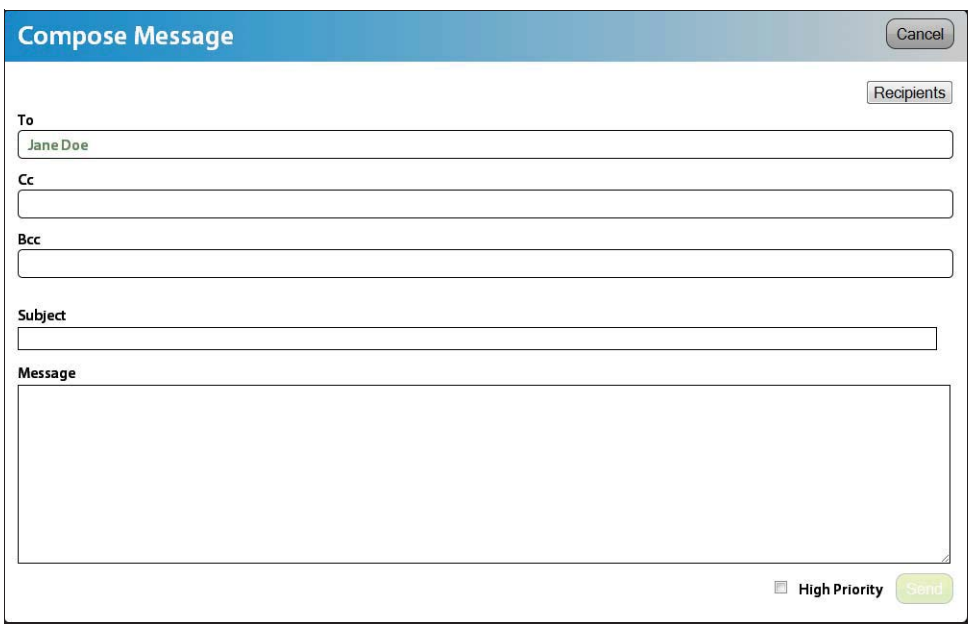
7. Tap the **Add** button to add the name to the Recipients list.

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.



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

8. Tap the **Done** 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.

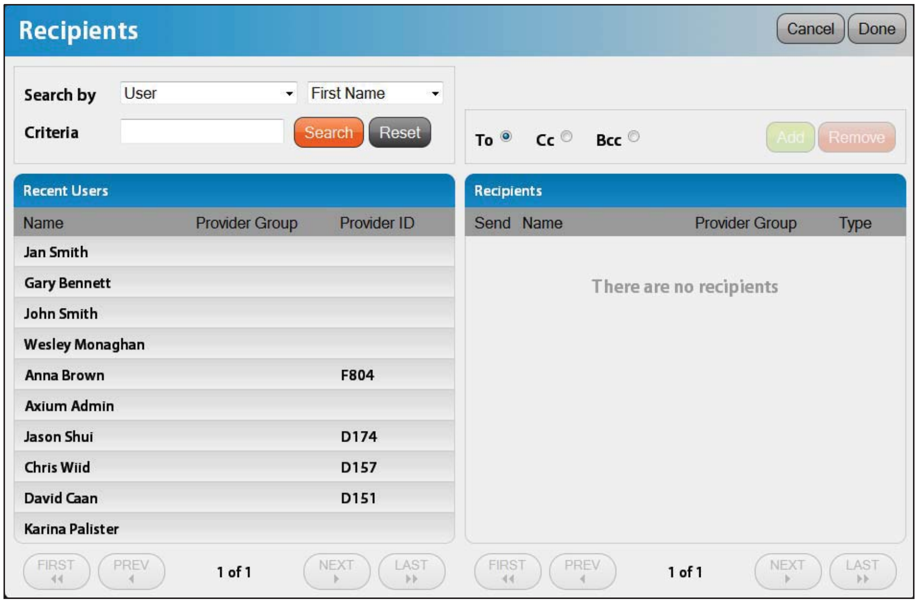
Composing a Message to an axiUm User

▼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.

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



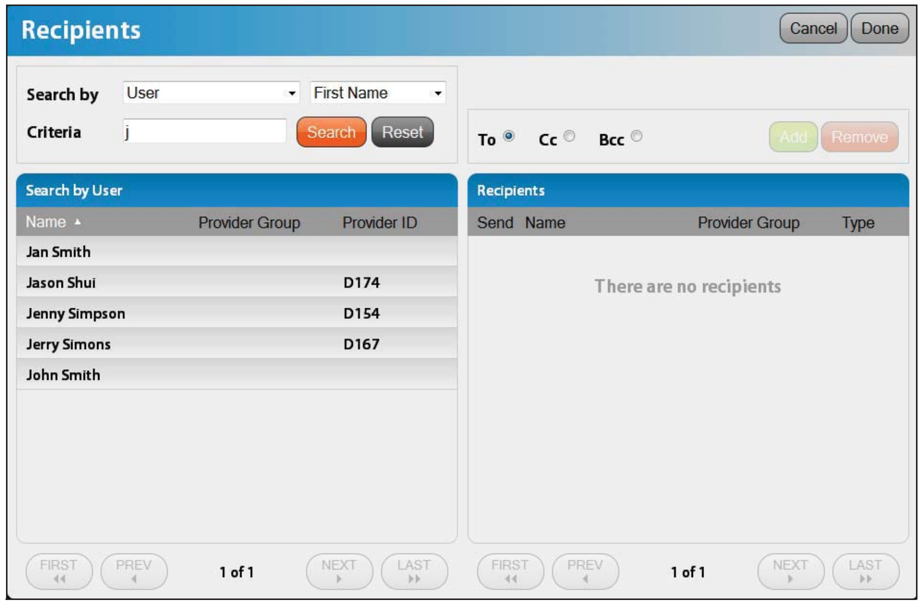
Alternatively, you can tap inside the To box.

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.

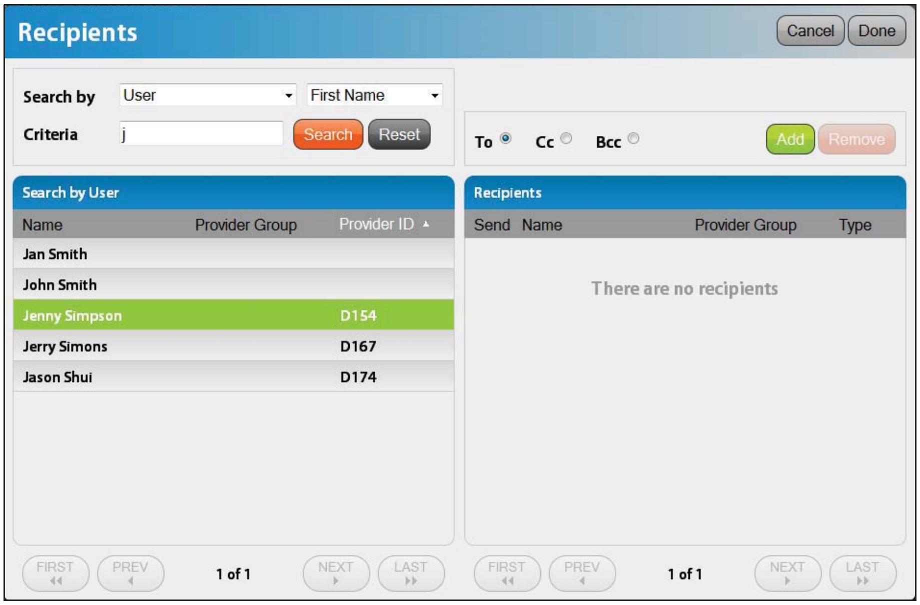
3.2. Tap inside the **Criteria** box, and enter the search criteria. In our example, we will enter the first letter ‘j’ to search for provider Jenny Simpson.

3.3. Tap the **Search** button.



4. Tap **To, Cc**, or **Bcc**, depending on how you want the user to receive the message.

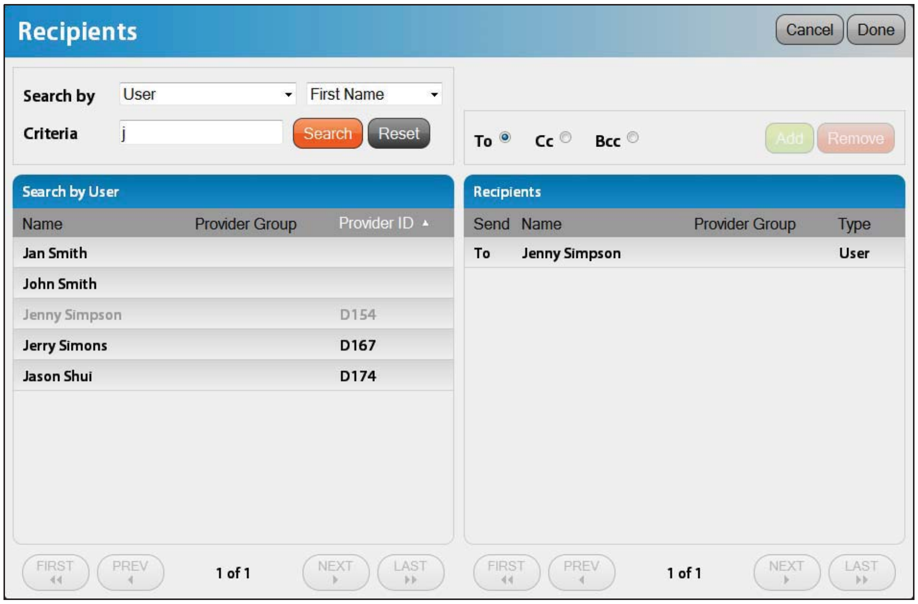
5. In the **Search by User** list, tap the recipient’s name.



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

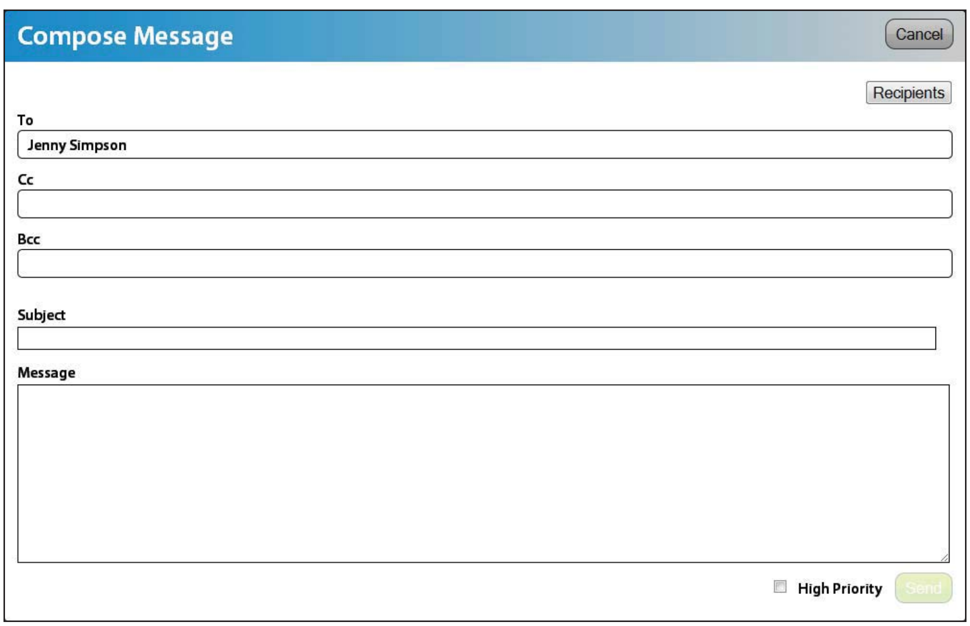
6. Tap the **Add** button to add the name to the Recipients list.

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.



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

7. Tap the **Done** button.



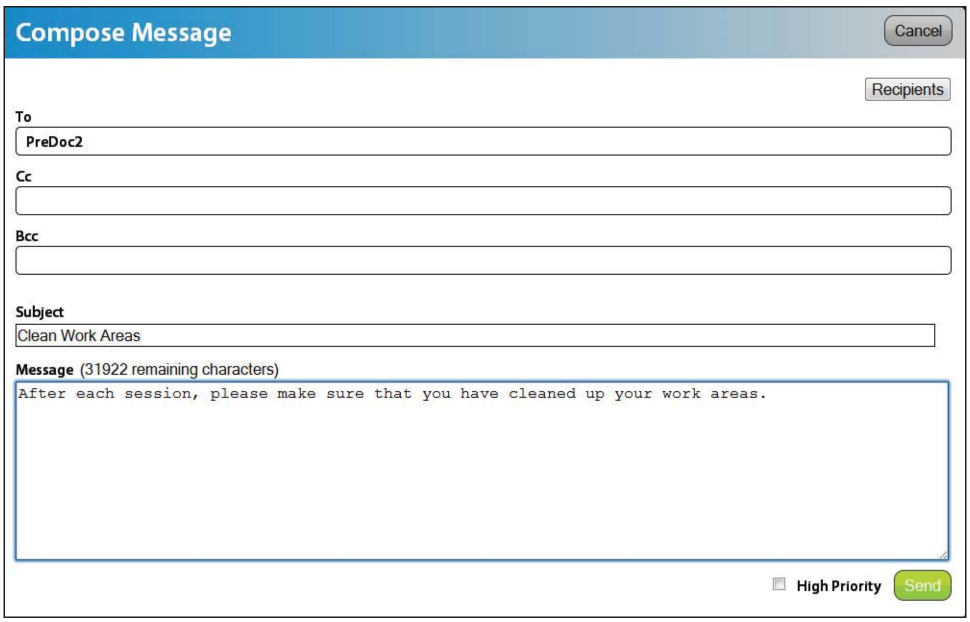
8. In the **Subject** box, enter the subject of the message.

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

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

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

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



11. Tap the **Send** button.

Exan FacultyAccess sends the message.

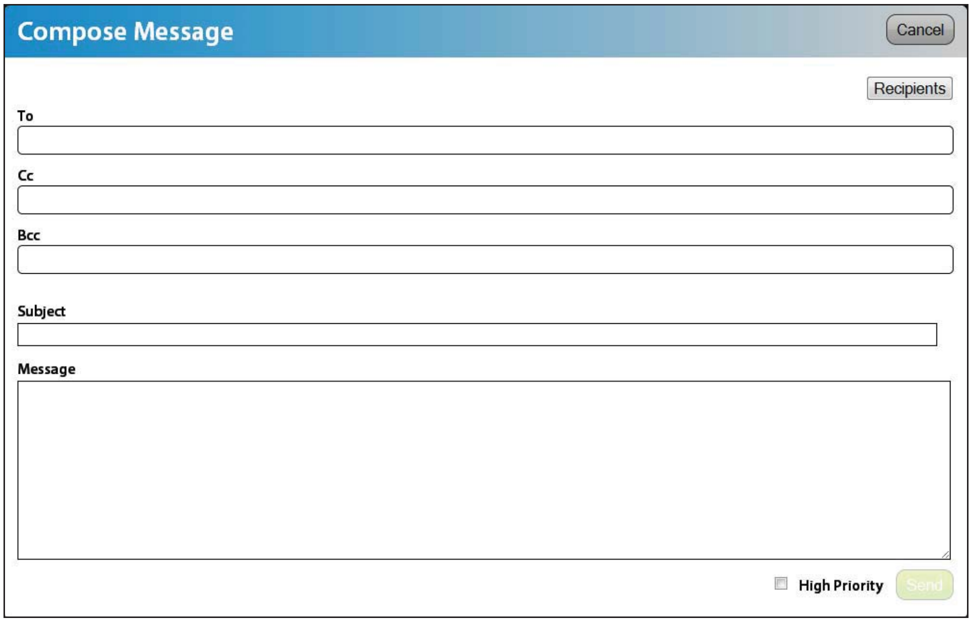
Composing a Message to Group

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

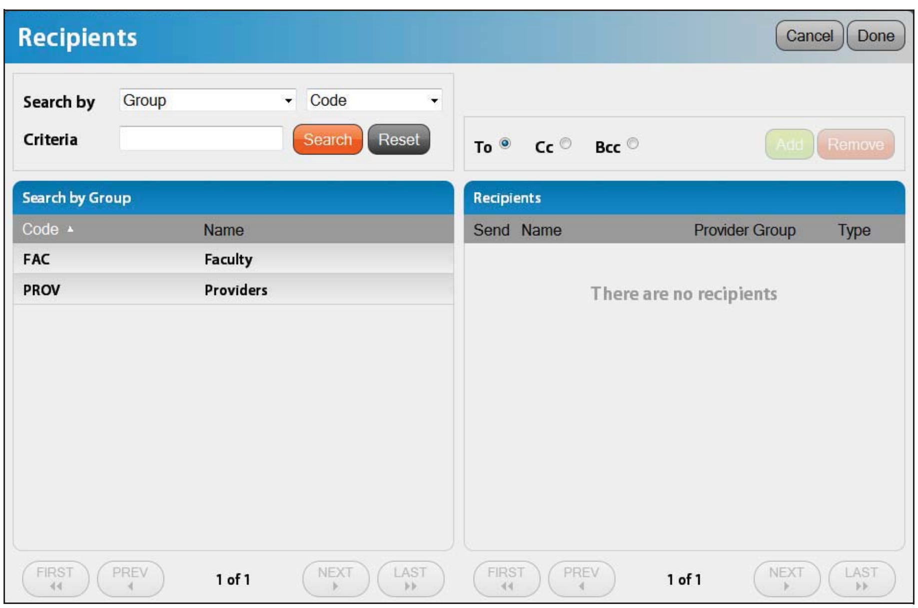
▼To compose a message to a group:

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

The Compose Message page is displayed.

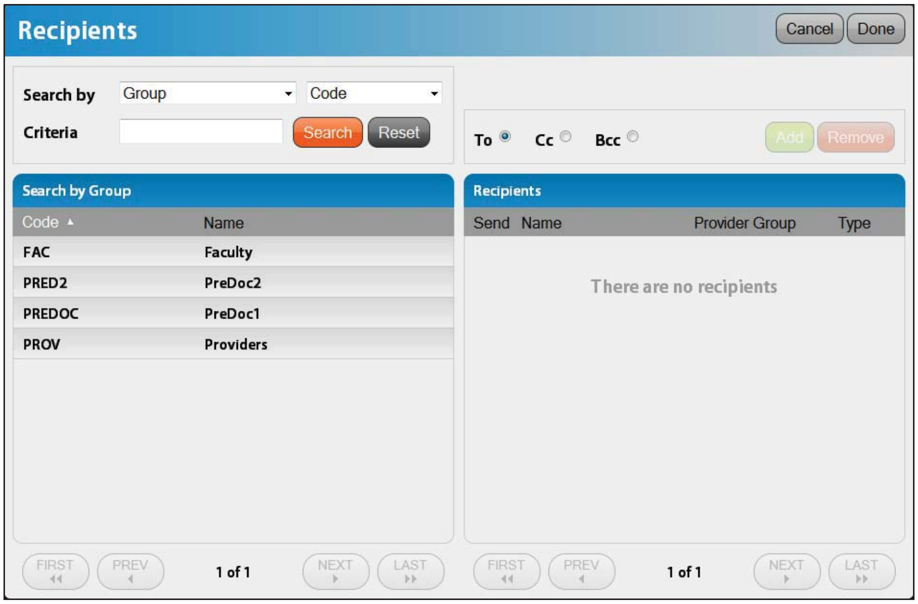


2. Tap the **Recipients** button to display the Recipients pop-up.



Alternatively, you can tap inside the To box.

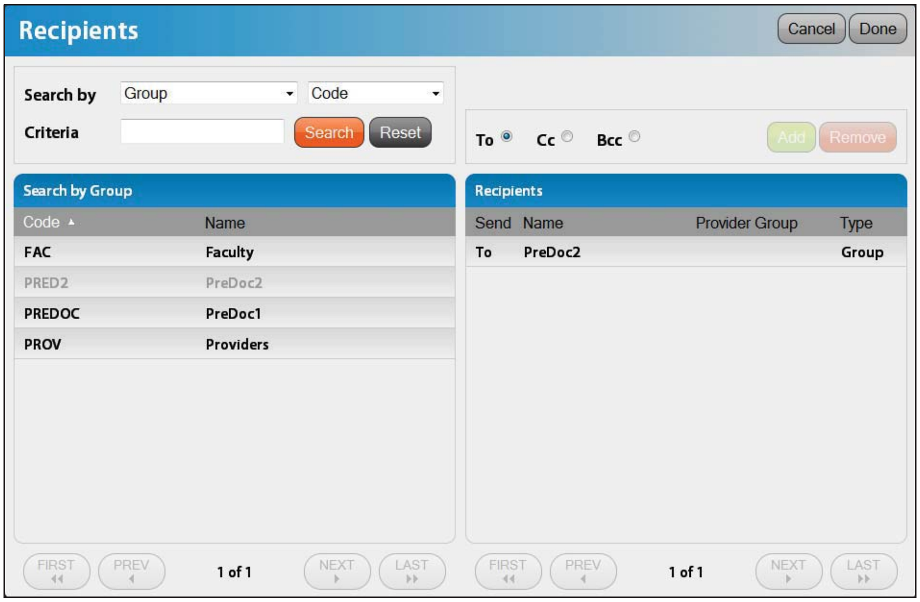
3. In the **Search by Group** list, tap the required recipient group.



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

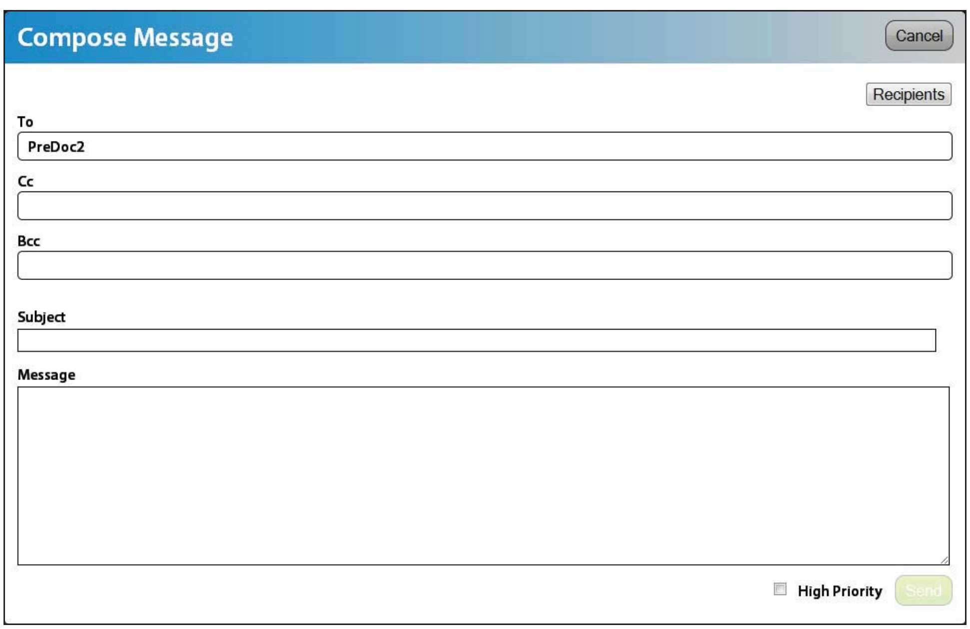
4. Tap the **Add** button to add the group to the **Recipients** list.

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.



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

5. Tap the **Done** button.



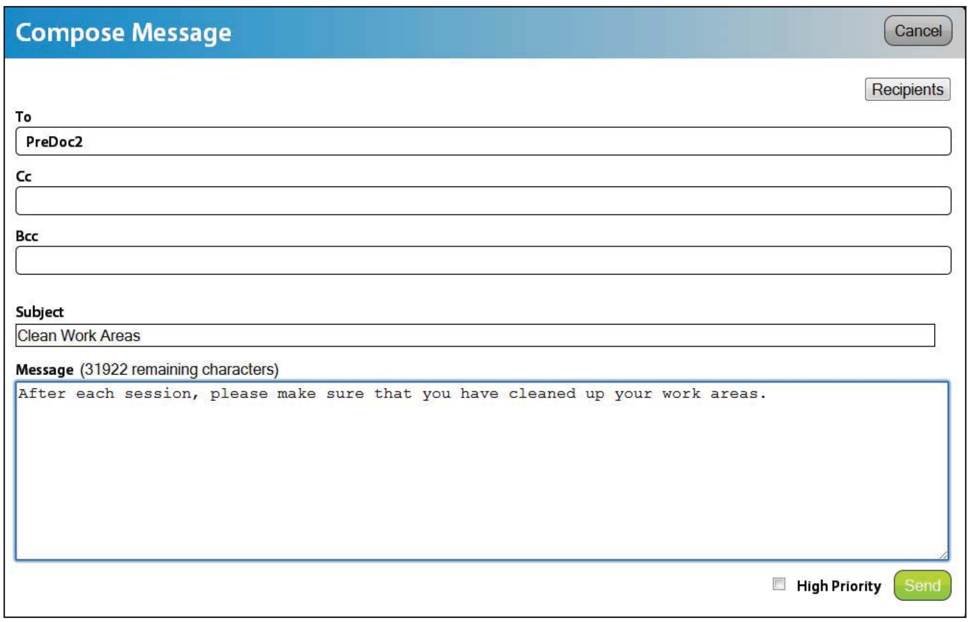
6. In the **Subject** box, enter the subject of the message.

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

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

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

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



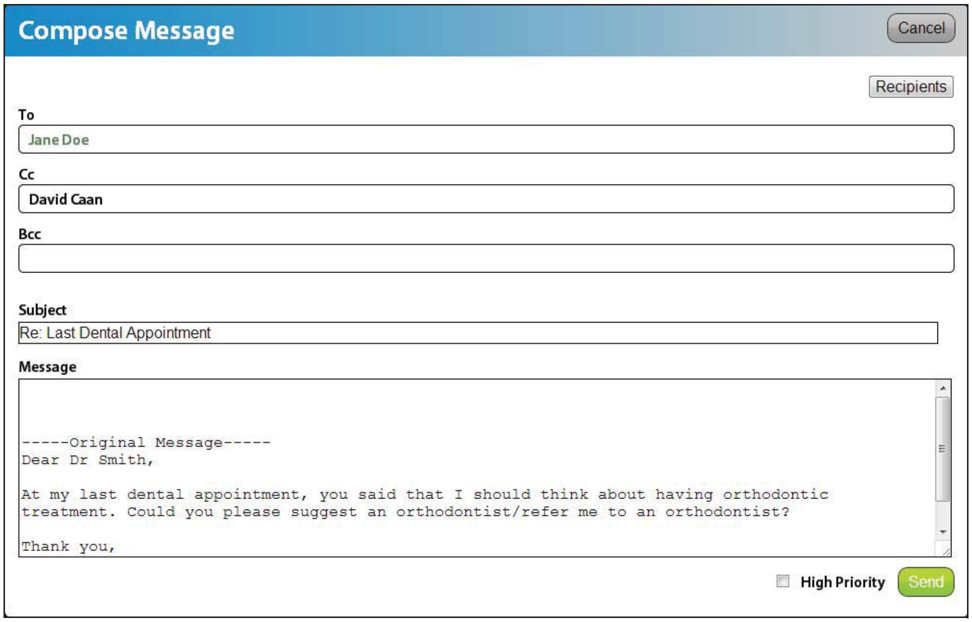
9. Tap the **Send** button.

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

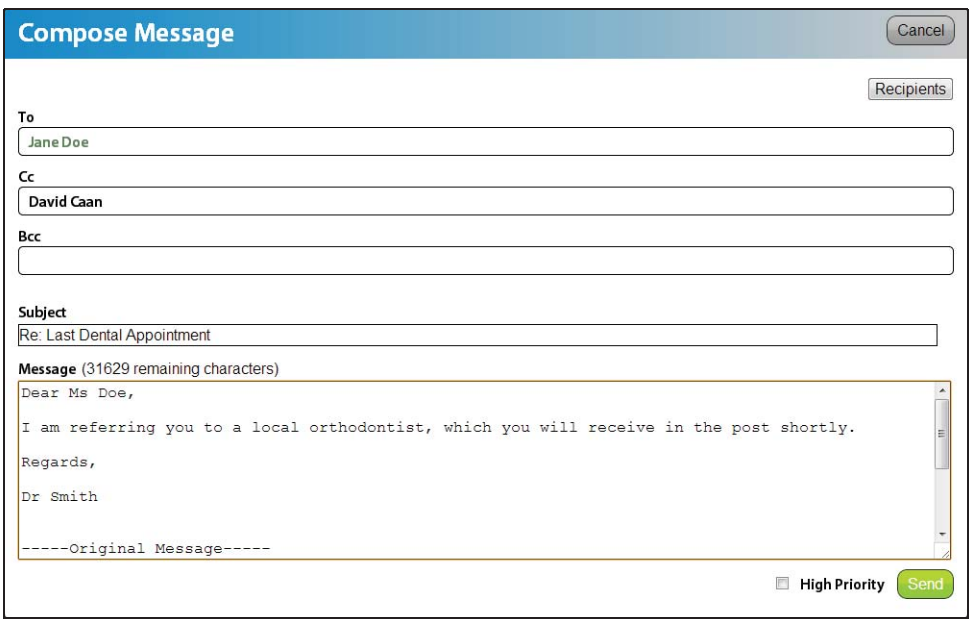
4.2 Replying/Replying All to Messages

▼**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.



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

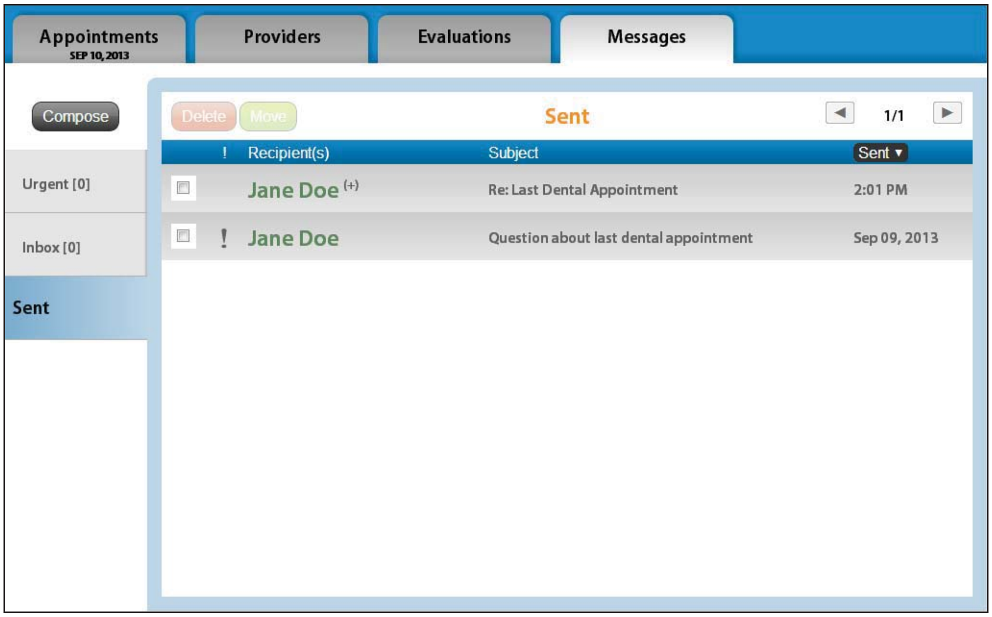


4. If the message is urgent, click the **High Priority** check box to select it.
5. Tap the **Send** button.

4.3 Forwarding Messages

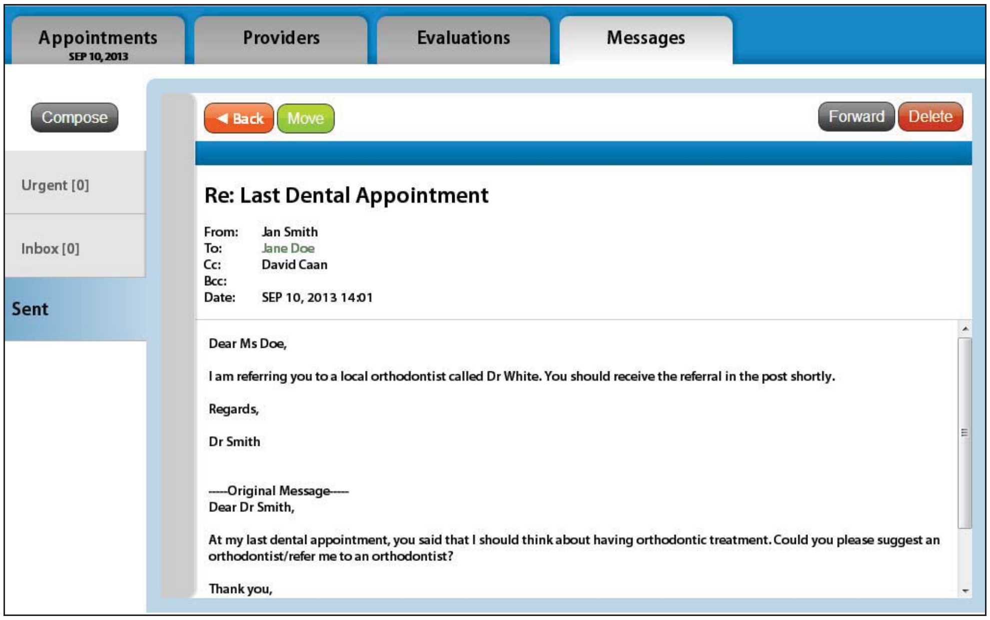
▼**To forward a message:**

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.

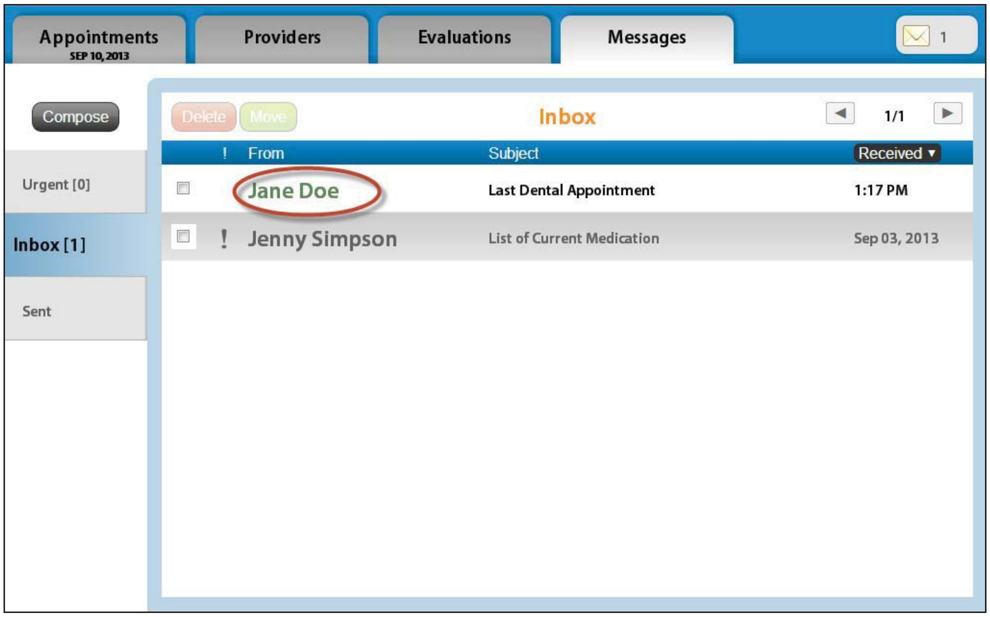
Viewing a Patient Message

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.

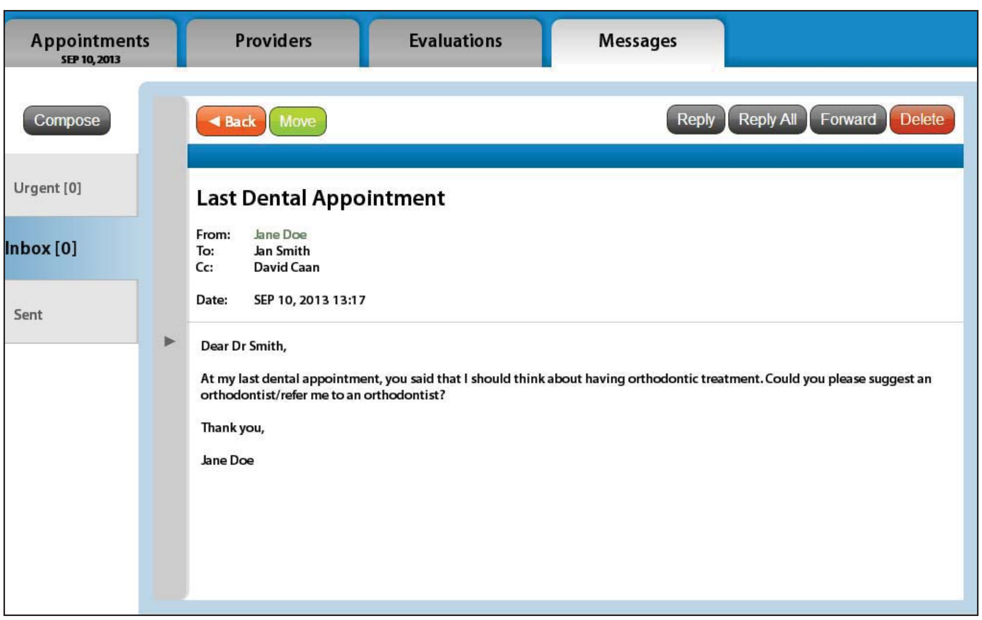
▼To view a patient message from the Inbox or Sent folder:

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



2. Tap a message from a patient.

   The Message Details page appears.

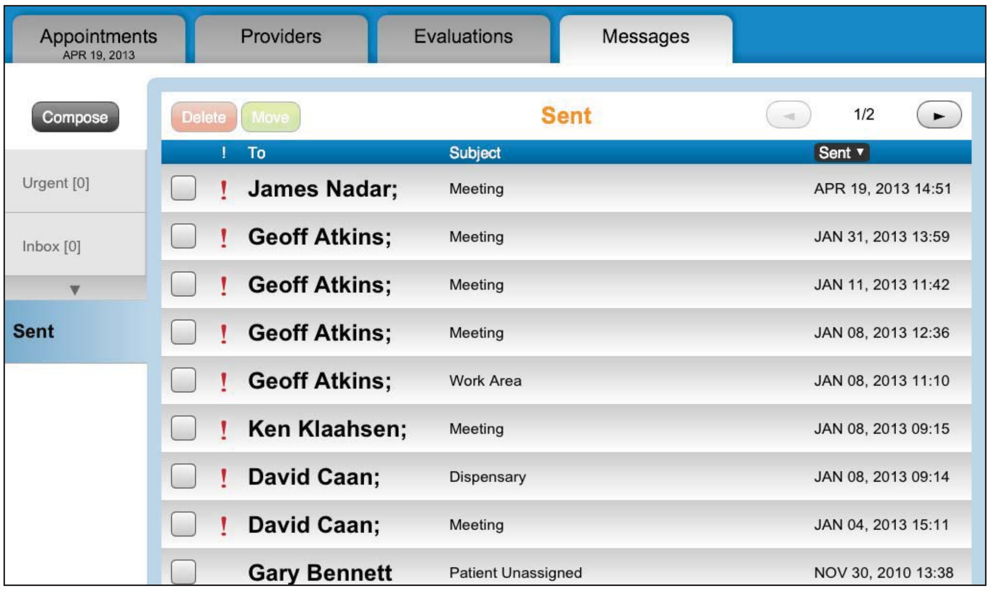


Viewing a Sent Message

▼**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:

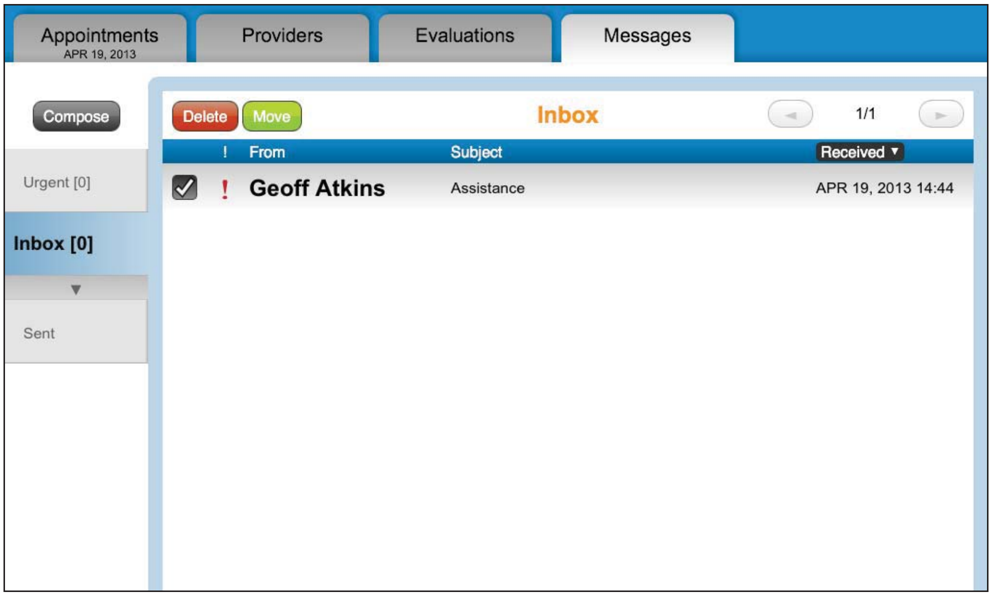
   - A provider, the current appointment details are displayed on the left.
   - Not a provider, the station name is displayed.

4.5 Moving Messages to Custom Folders

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

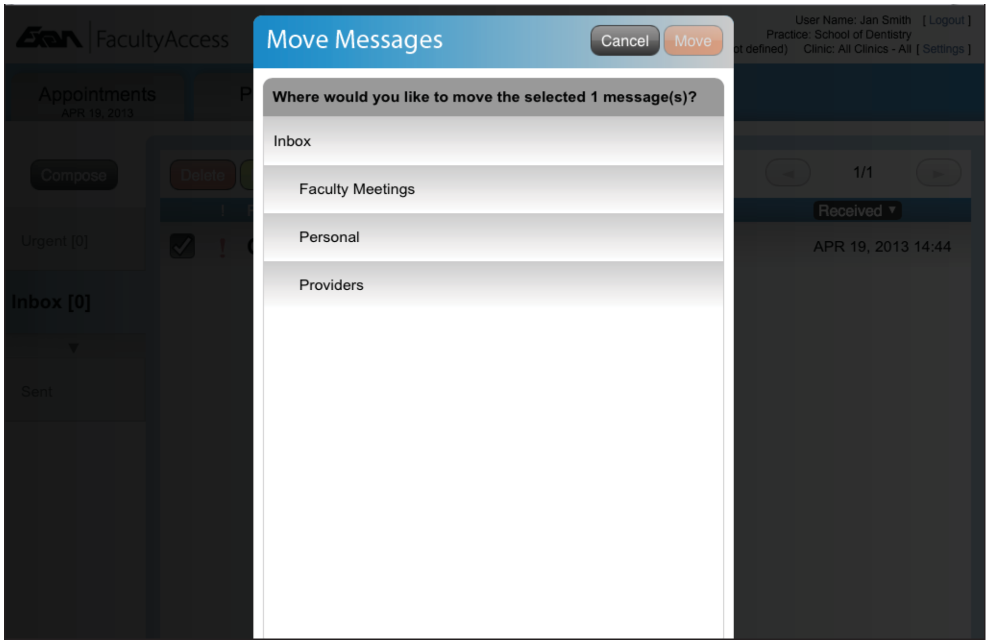
▼To move a message to a custom folder:

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).

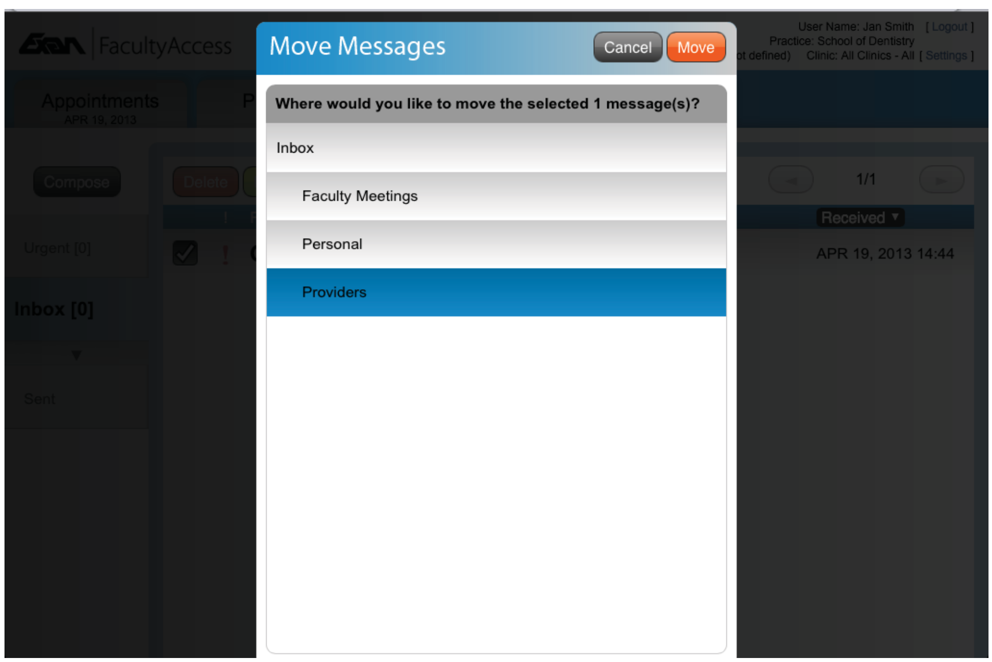


3. Tap **Move**.

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**.

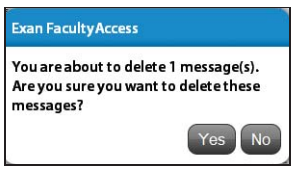
Exan FacultyAccess moves the message to the selected (custom) folder.

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.