The Personal Planner provides student providers with a complete overview of their workload. It includes eight tabs for:

- Lists
- Schedules
- Transaction – Planned/In Process
- Student Evaluation Summary
- Production Report - Completed
- Patient Tracking
- Missing Charges – Appointments
- Patient Info

After clicking the icon above to open the Personal Planner, click on the Lists tab to reveal seven sub tabs in the lower window for:

- Unapproved Items
- Assigned Patients
- Appointments
- Chart Requests (No longer used)
- Dispensary (not used)
- Lab Orders
- Assigned Forms

This document will show you how to navigate and use the seven List sub tabs. After selecting a tab, click the magnifying glass to show the entries for that tab.

This document also describes the functions of the other seven tabs of the Personal Planner.

1. **Unapproved Treatment**

   A. After selecting the **Unapproved** tab, click the magnifying glass to show your unapproved items. Right click an item to **Approve Item** or **Select Patient**.
B. To prepare for faculty approval of a listed item, right click **Approve Item.** *(Note: The patient and provider info has been pixilated for HIPAA compliance.)*

![Image of Personal Planner software interface with a dialog box labeled Approve Item and Select Patient, and a Patient Approvals window with a User Authentication box.]

C. A **Patient Approvals** window will open. From here, faculty can swipe their cards or enter their passwords to give their approval, in the **User Authentication** box.
D. To work with a patient’s records, right click the desired item and **Select Patient**.

2. **Assigned Patients**
   
   A. With the **Assigned Patients** tab selected, click the magnifying glass to show all patients assigned to you within the date range specified in the **Date From** and **Date To** fields. **Note:** Students cannot edit patient assignment records.

   B. Right click on an assigned patient to **Select Patient**, and work with their record. (The **Request Chart-Out** option is no longer used, since we now have electronic charts.)
3. Appointments
   A. With the appointment tab selected, click the magnifying glass to list all your appointments within the date ranges specified. The **Type** column displays the status of the appointment, including **active**, **request** and **checked in**.
   B. To edit an appointment request, double click the appointment line. Once the request has been filled, you can no longer edit the record.
   C. To add a new appointment request click on the **Create a new Record** icon. This will open the **Rolodex (Select Patient)** window.
   D. Enter a patient’s name and hit **Enter** to bring their information to the list box. Double click their list entry to open the **New Appointment Request** window.

4. **Chart Requests: N/A** *(We no longer use this tab at the dental school.)*
5. **Dispensary: N/A (Students at the dental school do not use this tab)**

6. **Lab Orders:** With the Lab Orders tab selected, click the magnifying glass to display all lab orders made by you within the date range specified.
   A. To edit a lab order, right click an order or double click the lab order line to open the Lab Order Details list. (*Note: All edits require faculty re-approval.*)
   B. To add a new lab order, click on the Create a new Record icon. This will open the mini-Rolodex for you to select a patient, which will open the Lab Order window.

7. **Production Report – Completed** tab shows you your completed work. To run it:
   A. Click the Production Report – Completed tab.
B. On the Enter Parameter Values box, select Report Type or Date Range. Click OK.

C. When Report type is highlighted, click the dropdown to select Detail or Summary, then click on Date Range to highlight it. You will then be prompted to enter the beginning date and ending date. After that, click OK.

D. A Production Report will be displayed, showing the information you specified. (The example below is blank.)
8. **Schedules**: Click the Schedules tab to see your active provider non-clinic times.

9. **Patient Tracking**: Click the Patient Tracking tab to see all the patients that have been assigned to you.
10. **Transaction-Planned/In Process**: When you click the Transaction-Planned/In Process tab, an **Enter Parameter Values** box will open. Here, select **Report Type, Date Range, or Status**. In the **Discrete Value** field, you may choose **Detail** or **Summary**.

![Transaction-Planned/In Process](image)

11. **Missing Charges-Appointments**: When you click the Missing Charges-Appointments tab, you will be shown any missing charges for your work. These must be resolved. (See your GPA for assistance.)

![Missing Charges-Appointments](image)
12. **Student Evaluation Summary** runs a report summarizing faculty evaluations of your work. To run the report, select **Date Range** or **Report Type**. (Same as above; click each one to supply criteria) Specify the date range you wish to include. (Check **No lower Bound** or **No upper Bound** if you do not wish to set an end or start date.) Click **OK**.

![Image of Parameter Values dialog box]

13. **Patient Info** shows the information for a selected patient. Click the Patient Info tab, then enter the patient’s chart number in the **Enter Parameter Values** box. Click **OK**.

![Image of Parameter Values dialog box]