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About this Guide

This guide introduces concepts and key tasks that relate to using Exan FacultyAccess.

Who is this guide for?

This guide is for:

• Instructors using Exan FacultyAccess in student clinics.
• Site administrators responsible for granting instructors access to Exan FacultyAccess.

This User Guide will help you start using Exan FacultyAccess. This guide explains the following:

• Document conventions
• Icon reference
• How Exan FacultyAccess interacts with axiUm
• Set up and configuration
• Signing in and signing out
• Using the features of Exan FacultyAccess

Because each institution may use different settings in Exan FacultyAccess, the examples shown in this guide may not reflect what you see. The screen capture examples were taken using the Apple iPad. The instructions in this guide assume that the users are accessing Exan FacultyAccess on an Apple iPad, for example, the use of “tap” instead of “click”.
Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>

Document Icons

This guide also uses the following icons to identify the different document elements:

- **Notes and helpful information.** For example, things that will become apparent later on in the procedure.

- **Important information or steps you must take.** For example, if you do not complete this step you may be unable to complete a task later on.

- **Tips, ideas, and alternative methods.** For example, using shortcuts, applying previously learned tools, or suggesting different uses.

- **Warnings before taking action.** For example, precautions against irreversible actions, or actions that require a lot of work to undo.

- **Challenges and extra steps.** For example, steps that take you beyond the basic procedures.
Exan FacultyAccess is a web-based application for use on Apple iPads that enables instructors and faculty members to manage the daily operation of a student clinic.

Instructors can display student appointments and treatments, approve and grade student procedures, and send and receive messages while they're touring the classroom clinic.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning of Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Caan, D. (D1234)</strong></td>
<td>An appointment highlighted in red indicates that it has not yet been start-checked and requires a start-check.</td>
</tr>
<tr>
<td><strong>Davis, A. (DD32)</strong></td>
<td>An appointment highlighted in green indicates that it has been start-checked by you.</td>
</tr>
<tr>
<td><strong>Klaahsen, K. (G150)</strong></td>
<td>An appointment with a gray background indicates that the appointment has been start-checked by another instructor.</td>
</tr>
<tr>
<td>![Dental Icon]</td>
<td>This red background indicates that during an appointment, a student has added a treatment item requiring you to start-check the appointment again.</td>
</tr>
<tr>
<td><strong>D2150 - Amalgam - 2 surfaces</strong></td>
<td>This treatment item highlighted in blue indicates that it needs to be approved.</td>
</tr>
<tr>
<td>![Treatments Icon]</td>
<td>This icon indicates the number of unapproved treatments for an appointment or provider.</td>
</tr>
</tbody>
</table>
### ICONS IN EXAN FACULTYACCESS

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon 1" /> 1</td>
<td>The number of unapproved general/SOAP/template notes for an appointment or provider.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 2" /> 1</td>
<td>The icon indicates the number of unapproved forms associated with a provider.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 3" /> 2</td>
<td>The icon indicates the number of unapproved clinical findings associated with a provider.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 4" /> 1</td>
<td>The icon indicates the number of unapproved periodontal charts associated with a provider.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 5" /></td>
<td>The icon indicates the number of unapproved letters associated with a provider.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 6" /></td>
<td>A red background on this search icon indicates that the currently displayed list is being filtered according to your search criteria.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 7" /></td>
<td>The icon indicates that you are watching this appointment.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 8" /></td>
<td>The icon indicates that you are watching an appointment with the same provider, but not this specific one.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 9" /> 1</td>
<td>The message alert badge indicates the number of unread messages that you have in your Inbox.</td>
</tr>
<tr>
<td><img src="image" alt="Icon 10" /> 1</td>
<td>The urgent message alert badge indicates the number of unread urgent messages that you have in your Inbox.</td>
</tr>
</tbody>
</table>

### How Exan FacultyAccess interacts with axiUm

When a user generates an event (e.g. submits a form, signs in):

- The iPad web browser (Apple Safari) sends an HTTP request to the web server where all the business logic and files are stored via the wireless network.
- The web server processes this request and queries the axiUm Oracle database via the network.
• The axiUmOracle database then sends the result set to the web server via the network.

• The web server generates HTML code based on the result set and sends the generated HTML to the Apple iPad for display to the user via the wireless network.
Any instructor in axiUm can gain access to Exan FacultyAccess.

Only users set up as instructors in axiUm have access to the Exan FacultyAccess website. Typically, the site administrators will give instructors access rights in axiUm to enable them to use Exan FacultyAccess.

1 Granting Instructors Access to Exan FacultyAccess

To grant instructors access to Exan FacultyAccess:

1. Go to the Maintenance module and select the Office tab.
2. Click the Users icon.
   The Users window displays.
3. From the Users list, select a user. For example, we will choose John Smith.
4. In the **Users** window, select the **Office** tab.

5. In the **Instructors/Approvers** section, select the **Instructor** checkbox.

6. Click **Save**.
Before you can access the Exan FacultyAccess website, you need to have:

- The Exan FacultyAccess website address
- One of the following:
  - Your axiUm user name and PIN
  - Your axiUm user name and password

Whether you sign in using your PIN or your password is determined by your institution.

This chapter covers the following topics:

- Signing in
- Signing out

1 Signing In

The two login methods are:

- Signing in using PIN
- Signing in using password

Exan FacultyAccess gives you an infinite number of sign-in attempts. Contact your website administrator if you are unable to sign in.

1.1 Signing in Using PIN

Use this sign-in method if the Exan FacultyAccess logon screen displays the PIN field rather than the Password field.
To sign in to Exan FacultyAccess using your PIN:

1. Go to the Exan FacultyAccess web site.

   Exan FacultyAccess displays the logon screen.

2. Tap in the **User Name** field, and using the on-screen keyboard enter your axiUm user name.

3. Tap in the **PIN** field, and enter your axiUm PIN.

4. Tap **Login**.

   The My Appts page displays, indicating that you are now signed in to Exan FacultyAccess.
1.2 Signing in Using a Password

Use this sign-in method if the Exan FacultyAccess logon screen displays the Password field instead of a PIN field.

This is your axiUm user sign-in password, not your card sign-in password.

▼ To sign in to Exan FacultyAccess using your password:

1. Go to the Exan FacultyAccess web site.

   Exan FacultyAccess displays the logon screen.

   ![Exan FacultyAccess logon screen]

2. Tap in the **User Name** field, and using the on-screen keyboard enter your axiUm user name.

3. Tap in the **Password** field, and enter your axiUm password.

4. Tap **Login**.

   The My Appts page displays.
2 Signing Out

Depending on your Exan FacultyAccess setup, you may be signed out after several minutes of continuous inactivity. This auto-log-off time is set up during the installation of Exan FacultyAccess. Contact your website administrator to change the auto-log-off time.

▼To sign out of Exan FacultyAccess:

1. In the top-right corner of the header, tap Logout.

   Exan FacultyAccess displays the logout message.

2. Tap Yes.

   Exan FacultyAccess signs you out, and displays the Exan FacultyAccess logon screen.
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 treatment items and notes attached to those treatments.

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

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

### Status of Appointments

<table>
<thead>
<tr>
<th>Appointment Color</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gray</td>
<td>No start-check required, or start-checked by someone else.</td>
</tr>
<tr>
<td>Red</td>
<td>Has not yet been start-checked and requires a start-check.</td>
</tr>
<tr>
<td>Green</td>
<td>Start-checked by you.</td>
</tr>
</tbody>
</table>
This section describes the main tasks involved in managing appointments:

- Displaying appointments
- Displaying appointments in another clinic
- Start-checking appointments
- Displaying your appointments
- Approving appointments
- Watching appointments
- Searching appointments
- Hiding appointments

1.1 Displaying Appointments

When you display all appointments, you are viewing all the appointments booked for today in the selected clinic (and session, selected in the Exan FacultyAccess User Settings page). You can view all the treatment items for an appointment as well as a detailed view of a treatment item.

The All Appts 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.
To display details of all appointments in a clinic:

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

2. Tap an appointment.

More details of the appointment display such as the number and type of treatment items.

3. Tap a treatment item or note to view more details.
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 section of the Header, tap **Settings**.

   The User Settings page displays.

2. Tap on the **Clinic** drop-down field, and tap a clinic. For example, we’ll select the PreDocs Clinic.
3. Tap OK.

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

Exan FacultyAccess retains these settings 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 section of the Header, tap Settings.

The User Settings page displays.

2. Tap on the Session drop-down field, and tap a session. For example, we’ll select the Morning Session (09:00 - 12:00).
3. Tap **OK**.

The Appointments page opens displaying all appointments in the selected session.

Exan FacultyAccess retains these settings the next time you sign in.

### 1.4 Start-Checking Appointments

The appointments highlighted in red require a start-check. You can start-check an appointment up to 30 minutes before the scheduled time and up to the end of the scheduled appointment. When you start-check an appointment on the All Appts page, the appointment also displays on the MyAppts page.
To start-check an appointment:

1. Go to the Appointments tab, and tap All Appts.

The provider appointments in red require start-checks.

2. Tap a provider appointment that requires a start-check. For example, we will select J. Simpson.
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 record in My Appts. Now when you select My Appts, you will see J. Simpson’s appointment highlighted in green to indicate that the appointment has been start checked.

The provider appears in the instructor’s list of assigned providers on the Providers/MyProv page.
1.5 Start-Checking an Appointment with an Added Treatment

If a treatment is added to an appointment that has been previously start-checked, the appointment should be start-checked again.
To start check an appointment previously start-checked:

1. Tap the appointment. The example below shows that J. Simpson added a treatment item during her 13.00-15.00 appointment.

2. Tap Start Check.

The Start Check notice displays.

3. Tap OK.

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

1.6 Displaying Your Appointments

Appointments displayed on the My Appts page are those appointments that you have start-checked. These are appointments under your supervision.

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 two treatment items in the appointment summary.
- There are no unapproved treatment items (indicated by the grayed-out icons).
1.7 Approving Appointment Treatments

You can approve an appointment and items such as treatments and notes associated with that treatment.

To approve a treatment item:

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

2. Tap an appointment record containing an unapproved item. For example, we will select L. Jaaks’ appointment.

3. Tap one or more checkboxes next to the unapproved treatment item(s). For example, we will select L. Jaaks’ D2140 - Amalgam - surface treatment.
4. Tap Approve.

Exan FacultyAccess displays the Approvals - Validate page.

5. Review the item(s) including any warnings/errors on this page.

6. Tap Approve to complete the approval of the item(s).
Exan FacultyAccess displays the Approvals - Complete page listing the approved item. You have the option here to evaluate the treatment item.

![Image of Approvals - Complete page]

7. Tap Close.

The approved treatment item now displays a green check mark to indicate that the treatment has been approved. If a treatment and provider requires an evaluation, a ‘Not evaluated Today’ checkbox displays to the right of the approved treatment item.
8. Tap a check box next to an item that requires an evaluation. In this example, we’ll select the comprehensive oral evaluation and amalgam that L. Jaaks has performed on patient M. Banks.

The Evaluation page displays with the name of the Provider and the treatment(s) that require evaluation.

9. If you want to evaluate:
   - The provider, select the check box next to the provider to perform a general evaluation.
   - The treatment(s), select the check box(es) next to the treatments to perform evaluations on the specific treatments.

### 1.8 Evaluating Appointment Treatments

You can perform evaluations on appointment treatments. In this example, we’ll evaluate a provider’s appointment and evaluate all the treatments (that require evaluating) associated with the appointment.

▼To evaluate an appointment treatment:

1. Go to the **Appointments** tab, and tap **All Appts**.
2. Tap inside the checkbox of the treatments that require an evaluation.

The Evaluation page displays.
In this example, K. Klaahsen has two treatments that can be evaluated. The instructor John Smith can choose to perform a general evaluation on the provider by selecting the General Evaluation checkbox.

The above evaluation shows a section for evaluating the appointment, and below this, more specific evaluations for a treatment. In this example, there are specific treatment questions associated with the D0150 - Comprehensive oral evaluation procedure.

3. Enter grades for each evaluation criterion.
4. Tap Submit to complete the evaluation form.

1.9 Searching Appointments

You can search appointments by provider using a search criteria to quickly 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 by patient, on patient first/last names.

▼To search for an appointment:

1. Go to the Appointments tab, and tap All Appts.
2. Tap (search).

The Search Appointments screen displays.

3. Do the following:
   - Tap the Keyword field, and using the on-screen keyboard, enter a keyword. For example, enter Chris.
   - From the Type drop-down field, choose a type. For example, choose Provider First Name.
4. Tap OK.

The content area displays the search results. For example, all appointments for the provider Chris display in the content area:
This (Search) icon above the search results indicates that the currently displayed list is being filtered. After you have completed your search, you may 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 All Appts.

2. Tap (Search).

   The Search Appointments screen displays.

3. Tap Clear.

   Exan FacultyAccess clears the search field.

4. Tap OK.

   The All Appts page refreshes, displaying a list of all appointments.
1.10 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 All Appts.

2. Tap (settings).

   The Appointment Settings screen displays.

3. Choose one or both of the following:
   - Tap Hide past appointments.
   - Tap Hide appointments that don’t require Start Check.

4. Tap OK.

   The All Appts page displays.
1.11 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 both the All Appts page and the Watch page.

Also, the Watch page can be used if an instructor temporarily leaves the clinic floor, and asks another instructor to supervise these appointments.

This section covers the following topics:

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

Adding Appointments to the Watch List

▼To add appointments to the Watch list:

1. Go to the Appointments tab, and tap All Appts.
2. Tap an appointment.
3. Tap Watch.

Exam 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 to the watch list.
If you tap the All Appts page, you’ll see that those providers who are being watched are marked with an icon:

- ![icon] indicates that the appointment is watched.
- ![icon] indicates that you are watching an appointment with the same provider but not this specific one.
Removing Appointments from the Watch List

To remove an appointment from the Watch list:

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

Exam FacultyAccess refreshes the page and removes the appointment(s) from the watch list.

2  Managing Providers

You can display providers with reserves for the day in a given clinic, including 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 reserves in a selected clinic today
- Displaying providers whom you have start-checked today
- Searching for a provider
- Displaying unapproved items
- Approvaling treatment items
- Searching for unapproved items
- Evaluating treatments

2.1 Displaying All Providers with Reserves in a Selected Clinic

You can display a list of all providers who have reserves in a selected clinic for today.

To display all providers in a selected clinic:

1. Go to the **Providers** tab, and tap **All Prov**.
2. Tap **Settings** in the top-right section of the Header.

The User Settings page displays.

💡 Log out to clear all watched appointments.
3. Tap the Clinic drop-down, and tap a clinic. For example, we will select PreDocs.

4. Tap OK.

Exan FacultyAccess displays a list of providers in the selected clinic. The example below shows providers in the PreDocs clinic. In this example, D. Caan has two unapproved treatment items and one treatment note.

5. Tap a provider record.
Exan FacultyAccess displays the provider details, the current appointment details for the provider, and a list of all unapproved items for that provider and details about those items. Items already approved today are also displayed.

### 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 attachments 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 Prov.

   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.

   ![My Providers Screenshot]

2. Tap a provider record.

   Exan FacultyAccess displays more treatment item details.
Those items with check boxes on the left require approval.

2.3 Approving Provider Treatments

In the provider details, you can approve items such as treatments, notes, EPR forms, clinical findings, periodontal charts, and letters.
To approve provider treatments:

1. Go to the Providers tab, and tap My Prov/All Prov.

2. Tap a check box next to any unapproved procedure(s). For example, we’ll select all of patient Jane Doe’s treatments.

3. Tap Approve.
Exan FacultyAccess displays the Approvals - Validate page.

4. Tap Approve.

The Approvals - Complete page displays, listing all approved items.

5. Do one of the following:
   - If you want to evaluate the procedure(s):
• Ensure that the checkbox is checked next to any treatment(s) you want to evaluate now (checkboxes are selected by default).

• Tap Evaluate. For instructions on entering evaluations, see Entering Evaluations on page 40.

• Tap Close. The All Prov page displays Evaluated by Me next to procedures that have been evaluated by you today.

2.4 Searching for a Provider

You can quickly search for a provider using the search criteria screen. The search feature enables you to search by:

• Search type
• Provider type
• Provider group

▼To search for a provider:

1. Go to the Providers tab, and tap All Prov.

2. Tap (search).

Exan FacultyAccess displays the Search Providers screen.
3. Tap the **Keyword** field, and using the on-screen keyboard enter a keyword. For example, we will enter *David*.

4. Tap the **Search Type** field, and select an option. For example, we will select *First Name*.

5. Tap the **Provider Type** field, and select an option. For example, we will select *Dental Student*.

6. Tap the **Provider Group** field, and select an option. For example, we will select *A, Comprehensive Care A*.

7. Tap **OK**.

The All Prov page returns the search criteria results.

This (search) icon above the search results indicates that the currently displayed list is being filtered. After you have completed your search, you may clear the search to display all providers again.

**Clearing Provider Search Results**

▶️ To clear a provider search:

1. Go to the **Providers** tab, and tap **All Prov**.

2. Tap (Search).

Exan FacultyAccess displays the Search Providers screen.
3. Tap Clear.
4. Tap OK.

The All Prov page refreshes, displaying a list of all providers.

3 Managing Evaluations

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

This section covers the following topics:

- Entering evaluations
- Displaying unevaluated treatment details
- Displaying graded evaluation forms
- Editing evaluation forms
- Holding evaluation forms
- Resuming held evaluation forms
- Deleting Evaluations

3.1 Entering Evaluations

Exan FacultyAccess enables you to perform evaluations from the Providers tab, the Appointments tab, and the Evaluations tab. You can also enter evaluations after approving items.

For instructions on evaluation appointment treatments, see Evaluating Appointment Treatments on page 25.

As an instructor, you can enter:

- Sessional evaluation where you perform an evaluation on the day of the procedure(s).
- General evaluation that evaluates the provider rather than specific procedures.
You can enter evaluations using one of the following methods:

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

**Entering Sessional Evaluations**

The sessional evaluation example is derived from the Providers tab.

▼**To perform a sessional evaluation:**

1. Tap the Providers tab.
2. Tap the MyProv/AllProv left-navigation menu.
   
   A list of providers display.

3. Tap a provider to see any treatments that require an evaluation.
4. Tap one of more checkboxes next to procedures requiring an evaluation.

The Evaluation page displays.

In the above example, we’ll choose to evaluate the D0150 Comprehensive evaluation procedure that K. Klaahsen performed on patient Jane Doe.
5. Tap **Continue**.

axiUm FacultyAccess displays the evaluation page.

In this example, the Daily Clinical Evaluation form has a list of general criteria that require grades, below which are specific criteria for the D0150 procedure.

6. Tap each of the **Grade** fields, and using the Grading Scheme, select a grade.

7. Tap **Submit**.

8. Tap **Close**.

Exam FacultyAccess displays the message: Are you sure?

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

The example below shows that instructor John Smith evaluated provider K. Klaahsen’s D0150 procedure (performed on patient Jane Doe) today.
Managing Evaluations

Entering General Evaluations

This section describes entering general evaluations from the Evaluations tab.

▼To enter a general evaluation:

1. Go to the Evaluations tab, and tap Uneval Tx.

The Unevaluated Tx area displays all unevaluated procedures by provider.
The example above requires instructor John Smith to evaluate three of provider Ken Klaahsen’s procedures.

2. Tap a checkbox next to the procedure(s) that you wish to evaluate today.

In the example above, we’ll select one of Ken Klaahsen’s treatments.

3. Tap Evaluate.
The Evaluation page displays.

4. Tap **General Evaluation** below the provider’s name.

The provider’s general evaluation is selected and all associated treatments are hidden.

5. Tap **Continue**.
The selected evaluation form displays.

6. Tap each of the Grade fields, and using the Grading Scheme, select a grade.
7. Tap Submit.
8. Tap Close.

Exan FacultyAccess displays the message: Are you sure?

9. If you have completed evaluating, tap Yes.
10. Go to the left-navigation menu, and tap Evaluations.

The completed general evaluation displays on the Evaluations page.
11. Tap each of the Grade fields, and using the Grading Scheme, select a grade.
12. Tap Submit.
13. Tap Close.

Exan FacultyAccess displays the message: Are you sure?

14. If you have completed evaluating, tap Yes.

3.2 Displaying Unevaluated Treatments

▼To display unevaluated treatment records:

1. Go to the Evaluations tab, and tap the Uneval Tx tab.

Exan FacultyAccess displays a list of all unevaluated treatments by provider.
2. Tap a checkbox on the right of an item that requires an evaluation.

3. Tap Evaluate.

The Evaluation page displays.

For instructions on entering evaluations, see Entering Evaluations on page 40.
3.3 Viewing Completed Evaluations

▼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.

On this page, you can edit, resume, or delete an evaluation.

Entering Cumulative Evaluations

A cumulative evaluation pertains to treatments that are evaluated multiple times. This is when a faculty member must continue marking the original cumulative form.

▼To enter a cumulative evaluation form:

1. Go to the Evaluations tab, and tap Uneval Tx.

Exan FacultyAccess displays any unevaluated treatments for today.
2. Tap the checkbox next to a treatment record.

3. Tap Evaluate.

Exan FacultyAccess displays the Evaluation page.
4. Tap the **New Evaluation** tab.

5. Tap a cumulative evaluation form. For example, tap the DCA form.

6. Tap **Continue** to display the evaluation form.

7. Tap each of the **Grade** fields, and using the Grading Scheme, select a grade.

8. After you have entered the evaluations, tap **Submit**.

Exan FacultyAccess displays the DCA evaluation form (ID 154) in the Cumulative Evaluation tab.
After you have completed (submitted) this form, Exan FacultyAccess adds this form to the record. In this example, there are now two DCA forms.

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

9. Tap **Close** to finish evaluating.

Exan FacultyAccess displays the message: ‘Are you sure’.
10. Tap Yes.

Exan FacultyAccess closes the Evaluation page.

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, provider K. Klaahsen has performed several procedures on patient J. Doe. Instructor John Smith has already evaluated one procedure and will add another procedure to the same evaluation.

▼To add a treatment to an existing evaluation:

1. Go to the Evaluations tab, and tap Uneval Tx.

Exan FacultyAccess displays a list of all unevaluated treatments.

2. Tap the checkbox next to a treatment procedure.

3. Tap Evaluate.

Exan FacultyAccess displays the Evaluation page.

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

4. In the My Evaluations tab, tap an existing grade form to which you want to add the procedure.
5. Tap **Add Tx & Edit**.

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

6. Tap the **Grade** field(s) and enter the new grade(s).

7. Tap **Submit**.

### 3.4 Editing Evaluation Forms

▼ **To edit an evaluation form:**

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

Exam FacultyAccess displays a list of all evaluation forms entered today.
2. Tap a checkbox next to an evaluation that you want to change.

3. Tap Edit.

FacultyAccess displays the selected evaluation form. You can edit this form.
3.5 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 40.

2. Tap the **Held For** checkbox.

   Exan FacultyAccess defaults to display your name (i.e. the current user).

   ![Evaluation Form Screen]

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

3. Tap the (ellipsis).

   Exan FacultyAccess displays the Instructor List page.

   ![Instructor List Page]
4. Tap a record. For our example, we will select Gary Bennett.

5. Tap Select.

Exan FacultyAccess selects the highlighted instructor record, closes the Instructor List page, and returns to the evaluation form.
6. Tap **Submit**.

Exan FacultyAccess submits the form.
3.6 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 John Smith wants to resume evaluating provider S. Rhabb.

2. Tap a checkbox next to a held evaluation.
3. Tap **Resume** to resume grading this form.

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

3.7 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 all evaluation forms entered today.

2. Tap an evaluation that you want to delete.

3. Tap **Delete**.
Managing Messages

Exan FacultyAccess displays a message screen: ‘Are you sure?’.

4. Tap Yes.

Exan FacultyAccess deletes the selected evaluation form.

4 Managing Messages

This section covers the following topics:

- Sending messages
- Reading messages
- Viewing sent messages
- Moving messages between folders
- Deleting messages
- Urgent and regular message alerts

4.1 Sending Messages

▼To send a message:

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

The Compose Message page displays.

2. Go to the To field, and tap (ellipsis).

Exan FacultyAccess displays additional tabs that enable you to quickly select the recipient(s).
3. Tap one of the tabs. For example, we will tap the Contacts tab.

4. To search your contacts, type a name using the on-screen keyboard. For example, we will enter/select the following:

   - [field]: jenny
   - [drop-down field]: first name

5. Tap the right arrow button. 

Exan FacultyAccess starts the search process, and returns the result in the Contacts tab area.
6. In the Contacts content area, tap the name you want to add to this message. For example, we’ll select Jenny Simpson.

Exan FacultyAccess adds this name to the To field.

7. Tap the Subject field, and using the on-screen keyboard, type the subject of the message.

8. Tap the Message text box, and type your message.
9. Tap Send.

Exan FacultyAccess sends the message. If you sent the message to a group, all members of the group receive the message (via axiUm).

### 4.2 Reading Messages

Exan FacultyAccess notifies you when you have received an urgent or non-urgent message. You may see these message alert icons display on the right of your menu bar: ![urgent message] (urgent message) and ![non-urgent message] (non-urgent message). A gray message alert icon shows the amount of unread regular messages and a red e-mail alert icon shows the amount of unread urgent messages.
Managing Messages

To read a message:

1. On the navigation bar, tap a message alert icon.

The Messages page Inbox displays the new message(s).

2. Tap the message to display its contents.
4.3 Displaying Sent Messages

To view a sent message:

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

Exan FacultyAccess displays a list of all messages you 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 display on the left.
- Not a provider, the station name displays.

### 4.4 Moving Messages to Custom Folders

You can move messages to custom folders created in axiUm’s Messenger window.

▲To move a message to a custom folder:

1. Go to the Messages tab, and find the message you want to move. For example, we’ll go to the Sent folder and select the message that instructor John Smith sent to Lisa Jaaks about a missing consent form.

2. Tap the checkbox next to the message that you want to move (you can also multi-select).
3. Tap **Move**.

The Move Messages screen displays with the question: “Where would you like to move the selected 1 message(s)?”

4. Tap a custom folder. For example, we’ll move the message to the Providers folder.
5. Tap **Move**.

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

6. Tap the target folder to see the moved message.
4.5 Deleting Messages

To delete a message:

1. Go to the Messages tab, and tap a checkbox next to a message.
2. Click Delete.

The axiUm - FacultyAccess message displays.

3. Tap Yes to delete the message.

Exan FacultyAccess deletes the selected message.