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The Operatory Monitor is a new system to monitor the status of appointments, following patients through their clinical experience, and alerting staff and faculty of providers in need of assistance. This system can be used at the front desk to check in patients and monitor patient flow, or displayed in a central location, to alert shared staff or faculty to critical needs and clinical progress. Provider notifications are also received by Exan FacultyAccess, creating a complete clinical notification system. In an educational environment, a student can simply update their status, indicating a need for approval. In a professional clinic, a hygienist can signal a need for a dentist to consult with a patient. These silent notifications generate alerts in both the Operatory Monitor and Exan FacultyAccess, allowing the provider to remain with the patient while knowing that help is on the way.

Setting up the Operatory Monitor

Defining Clinical Notification States

Clinical notification states are different provider statuses, which can be set on appointments. These can be prioritized to show the most important at the top of the list for faculty and staff to identify urgent requests.

To define clinical notification states:

1. Go to the Maintenance window.
2. Click the Scheduler tab. There is a Clinical Notification States icon.
3. Double-click the Clinical Notification States icon. axiUm displays the Clinical Notification States window.

Use this window to configure clinical notification states.

**Display text color in Graphic mode based on Appointments’ types** is used to show the text color of the patient’s status on the selected notification color. If this option is not selected, the text color is black. This is used when the text and notification colors are similar.

**Notification is session-based (will not extend beyond session)** sets the provider notification to session-based only. For example, if the provider asked for HELP in the morning session, it will not show in the afternoon session.

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**Granting Access to Clinical Notification States**

To grant access to clinical notification states, click (Level Access) in the Clinical Notification States window.

axiUm displays the Clinical Notification State Access window.
Selecting Clinical Notification Settings

The Clinical Notification Settings window allows a provider to set preferences on their workstation.

To select clinical notification settings:

1. Go to the Maintenance window.
2. Click the System tab.
3. Double-click the Desktop icon.
   There is a Clinical Notifications button.

4. Click the Clinical Notifications button.
   axiUm displays the Clinical Notification Settings window.

5. Click (ellipsis) to select the default chair for the workstation being used.
If a provider has multiple chairs with multiple workstations, each one can have a default chair. This allows you to select different clinical notification states, for example:

- Chair1: Ready for start check
- Chair2: Require help/assistance
- Chair3: Ready for approvals

**Opening the Operatory Monitor**

To open the Operatory Monitor:

1. From the desktop, click (Scheduler).
2. Click (Operatory Monitor) in the Scheduler toolbar. axiUm displays the Operatory Monitor window.

This is how the Operatory Monitor may look with no appointments:
Operatory Monitor Options Setup

To set Operatory Monitor Options, click the Options button in the Operatory Monitor window.

Mounted Mode is used for wall mounted monitors in text mode. Pause and stop buttons are available below the clinical chair map. Right-click menus are only available when mounted mode is paused.

Auto-cycle Clinics automatically scrolls through each clinic in a group, based on the time entered in the Auto-cycle Display Every __ seconds box. Clinic groups are defined in the Clinic Groups window (Maintenance window - Scheduler tab - Clinic Groups icon).

Auto-page in Lists per clinic automatically scrolls through the clinic before the next clinic. This option is used for a large number of appointments in a clinic.

Session Time displays all appointments in the session ___ Minutes Before Current Time and ___ Minutes After Current Time in graphic mode.

Current Time displays all appointments between the current time, and ___ Minutes Before Current Time and ___ Minutes After Current Time.
Using the Operatory Monitor

The Operatory Monitor runs in two main modes:

- Graphic mode displays a pictorial view of your clinic, and the current activity in each chair.
- Text mode displays a list of current appointments, and patient and provider statuses.

Graphic Mode

The text color indicates the patient’s status. These are the same colors used in the Scheduler:

- Green: Not Here
- Purple: Signed In
- Red: Checked In
- Black: Seated
- Gray: Checked Out

The background color indicates the provider’s status. These colors and descriptions are defined in the Clinical Notification States window.

The chair is divided when two appointments are scheduled within a time range. This time range is selected in the Operatory Monitor Options window.

Displaying Patients

To display patients in graphic mode:

1. From the Monitor section, select Patients.
2. From the Display section, select Graphic.
3. Click the Patients tab.
4. From the list view, highlight a patient to select the chair.
5. From the list view, right-click on a patient to change the patient’s status.
Selecting Clinical Notification States

To select clinical notification states in graphic mode, choose one of the following options:

Option 1:

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Right-click on a chair to select a clinical notification state.

Option 2:

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. Right-click on a chair to select a clinical notification state.
Displaying Providers

To display providers in graphic mode:

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Click the Patients tab.
4. From the list view, highlight a patient to select the chair.
5. From the list view, right-click on a patient to change the patient's status.
Displaying Patients and Providers

To display patients and providers in graphic mode:

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. From the list view, highlight a patient to select the chair.
4. From the list view, right-click on a patient to change the patient’s status.
**Viewing Appointment Details**

To view appointment details, choose one of the following options:

**Option 1:**

1. From the Monitor section, select **Patients**.
2. From the Display section, select **Graphic**.
3. Hover over a chair to display appointment details.

**Option 2:**

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Hover over the chair to display appointment details.

**Option 3:**

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. Hover over the chair to display appointment details.
Displaying List of Providers

To display a list of providers in graphic mode, choose one of the following options:

Option 1:

1. From the Monitor section, select **Patient**.
2. From the Display section, select **Graphic**.
3. Click the Providers tab.
4. From the list view, right-click on a provider to select a clinical notification state.

Option 2:

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Click the Providers tab.
4. From the list view, right-click on a provider to select a clinical notification state.

Option 3:

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. Click the Providers tab.
4. From the list view, right-click on a provider to select a clinical notification state.
Displaying List of Instructors

To display a list of instructors in graphic mode, choose one of the following options:

Option 1:

1. From the Monitor section, select **Patients**.
2. From the Display section, select **Graphic**.
3. Click the Instructors tab.

Option 2:

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Click the Instructors tab.

Option 3:

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. Click the Instructors tab.
# Viewing Chair State History

To view chair state history, choose one of the following options:

**Option 1:**

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Graphic**.
3. Right-click on a chair and select the **Show Notification History** option.

**Option 2:**

1. From the Monitor section, select **Both**.
2. From the Display section, select **Graphic**.
3. Right-click on a chair and select the **Show Notification History** option.

**Option 3:**

1. From the Monitor section, select **Providers**.
2. From the Display section, select **Text**.
3. Right-click on a chair and select the **Show Notification History** option.

**Option 4:**

1. From the Monitor section, select **Both**.
2. From the Display section, select **Text**.
3. Right-click on a chair and select the **Show Notification History** option.

## Text Mode

Text mode is used with wall mounted monitors. The columns can be resized.
Selecting Clinical Notification States

To select clinical notification states in text mode, choose one of the following options:

Option 1:

1. From the Monitor section, select Providers.
2. From the Display section, select Text.
3. From the list view, right-click on a patient to select a clinical notification state.

Option 2:

1. From the Monitor section, select the Both option.
2. From the Display section, select the Text option.
3. From the list view, right-click on a patient to select a clinical notification state.

The highlighted record displays patient information on the right side, and selects the chair on the clinical chair map below.

Displaying Patients

To display patients in text mode:

1. From the Monitor section, select Patients.
2. From the Display section, select Text.
3. From the list view, highlight a record to display patient information on the right side, and select the chair on the clinical chair map below.
Appointments in the same chair within a session may show more than one color.

Displaying Providers

To display providers in text mode:

1. From the Monitors section, select **Providers**.
2. From the Display section, select **Text**.
3. From the list view, highlight a record to display patient information on the right side, and select the chair on the clinical chair map below.

The text color is black.
Displaying Patients and Providers

To display patients and providers in text mode:

1. From the Monitor section, select **Both**.
2. From the Display section, select **Text**.
Selecting Clinical Notification States from Taskbar

To select clinical notification states from the taskbar, click the box next to the messenger icon. This communicates to Exan FacultyAccess.

If there are no appointments, the box is gray, and the provider is unable to select a clinical notification state.

This allows the provider to alert faculty of the state of their appointment, and call for assistance without leaving the chair.

Reporting

Critical resolution response time is tracked and it can be reported from the Info Manager. Alternatively, custom reports can be created to show more details.

To report from the Info Manager:

1. From the desktop, click (Info Manager).
2. Click the Appointment tab.
3. Highlight the Chair Notifications option under Category.