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Patient Self-Registration

Patients with an Existing Account and Completed Registration

Patients with a Registered Account but an Incomplete Setup

Patients with an Existing Account that is Locked
This User Guide will help you start using Exan PatientAccess. It shows you how to:

- Follow document conventions.
- Familiarize yourself with the Exan PatientAccess windows.
- Use features for day-to-day tasks.

Because each institution may have customized versions of Exan PatientAccess, the examples shown in this user guide may not reflect what you see.

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>
# 1 Document Icons

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>🚨</td>
<td>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.</td>
</tr>
<tr>
<td>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td>ผลกระทב</td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
About Exan PatientAccess

Exan PatientAccess is an optional online module that lets patients connect to axiUm through the Internet and is part of the axiUm HealthAccess suite of products.

In Exan PatientAccess, patients can:

- Update EPR (Electronic Patient Record) forms
- Verify personal information and demographics
- View past appointments
- Confirm future appointments
- Review and update medical and insurance information
- View Ambulatory summary
- Send messages
- View activity in PatientAccess.

1 About the Exan PatientAccess Pages

1.1 Home Page

On the Exan PatientAccess Home page, patients can view a:

- Welcome message.
- Login area. If patients want to access their health information in
Exan PatientAccess, they must enter their user name and password on this page.

1.2 Terms of Use Agreement Page

Depending on the requirements of your dental institution, patients may be required to agree to a Terms of Use Agreement before they can access the main Exan PatientAccess website.
Your dental institution will have a similar Terms of Use Agreement to the example provided above.

Patients can select the Terms of Use Agreement link at the bottom of any page at any time.

1.3 Updates Credentials Page

The Update Credentials page appears if a patient is signing in to Exan PatientAccess for the first time, or if a patient is logging in with a temporary password, after having received a password reset.

If this page appears, patients must:

- Enter a new password.
- Select three security questions
- Enter answers for each security question.

![Update Credentials Page](image)
1.4 Appointments Tab

In the Appointments tab, there are two pages:

- Appointment List

![Appointment List](image)

- Upcoming Appointment

![Upcoming Appointment](image)

On the Appointment pages, patients can:

- View upcoming appointments.
- Confirm upcoming appointments.
• View a history of all appointments: planned, cancelled, and failed.
• View appointments within a given date range.
• View details of a particular appointment.
• View appointments in a monthly calendar view.
• View appointments in a yearly-calendar view.
• Compose a message.

1.5 iForms Tab

In the iForms tab, patients can:

• View non-urgent iForms.
• View iForms that require their attention.
• View read-only iForms.
• Update/completed iForms.

iForm patient answers display in the axiUm EHR Forms tab in green text.
1.6 Personal Information Tab

The Personal Information page may display the following pages:

- Personal Information page
- Medical Information page
- Insurance Policy Information page
- Change User name and Password page
- Change Security Questions page
- Ambulatory Summary page

**Personal Information Page**

On this page, patients may:

- View and update (if permitted by your institution) their personal information such as date of birth, address, and contact details.
- Mark personal information as incorrect if permitted by your institution. When a patient next visits your institution and you open the patient’s file, a sticky note is displayed indicating that the patient’s personal information requires updating.
Medical Information Page

On this page, a patient may view a list of:

- Dental problems
- Current medications
- Medical alerts
- Medical problems
- Allergies
Insurance Policy Information Page

On the Insurance Policy Information page, patients can view their Active (current) and Future (future-dated) insurance policy plans. This page provides a summary of each policy plan, including the:

- Insurance Company Name
- Policy start/end dates (note that one or both may be left blank in axiUm)
- Employer
- Policy holder
Insurance Policy Details Page

On this page, patients may view more details such as:

- A list of people covered by an insurance policy, including the dependent relationship and the dependent start/end coverage dates.
- Dependents who have future-dated coverage under the policy (shown in gray text).
- The name of the insurance company.

Information on this page includes:

- Insurance Company Name
- Group
- Division
- Employer
- Plan type
- Subscriber #
- Start/End dates
- Family limit balance
- Family deductible balance
Change Username and Password Page

On the Change Username and Password page, patients may change their:

- Current user name
- Current password
Change Security Questions Page

On the Change Security Questions and Answers page, patients:

- Select three different security questions.
- Enter three security answers.

Ambulatory Summary Page

On the Ambulatory Summary page, patients can:

- View a summary of their health information such as a history of their medications, medication allergies, medical problems, and a history of their treatments.
- Download their ambulatory summary in HTML format.
- Download their C-CDA (Consolidated Clinical Document Architecture) Ambulatory summary.
- Send their ambulatory summary to a provider, who is not a member of the dental institution.
1.7 Recent Activity Page

On the Recent Activity page, patients can:

- View their actions or the actions of their authorized representative (if applicable).
- Filter information based on specific actions.
- Sort information by column (by default columns are sorted by date).
Audit records are created only if axiUm’s Advanced Audit log is enabled. We recommend that you hide the Recent Activity page if the Advanced Audit log setting is not enabled.

1.8 Messages Tab

In the Messages tab, patients can:

- View Messages
- Compose Messages
- Reply/Reply All to a Message
- Forward a Message
- Delete a Message
- View Sent Messages
- Delete a Message from the Inbox
## 1.9 FAQ Page

On the FAQ page, patients view frequently asked questions provided by your institution.

![Message List](image)

### Frequently Asked Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q. How do you change your personal information?</td>
<td>A. Mark the information as ‘incorrect,’ and a school representative will contact you.</td>
</tr>
<tr>
<td>Q. How do you confirm an appointment?</td>
<td>A. Go into appointment details page by clicking the appointment, and press ‘Confirm’ button. If the appointment is already confirmed, you will see blue header.</td>
</tr>
<tr>
<td>Q. How do you change your password?</td>
<td>A. Go into Personal Information -&gt; Change Username and Password.</td>
</tr>
</tbody>
</table>

Welcome, J. Doe

Login
1.10 Contact Us Page

On the Contact Us page, patients can view your dental institution’s contact details.

Contact Us

1093 Livewell Highway
Coquitlam, BC
Canada V3K 3T9

Email: info@exanegroup.com
Phone: 604-468-6820
Toll-Free: 1-888-888-6223
Fax: 604-468-6850

If you have a question for the Exan Group, or are looking for more detailed information on our products and services, please don’t hesitate to send us your inquiries. We’ll do our best to respond to you as soon as we can.
This chapter provides you with the necessary setup instructions to enable patients to access Exan PatientAccess and to view and complete information online.

Also included are instructions for setting up messaging between patients and axiUm users.

Setting up patients to use Exan PatientAccess involves three stages:

1. Marking EPR forms as iForms.
   
   For instructions on marking EPR forms as iForms, see *Marking an EPR Form as an iForm* on page 17.

2. Granting patients access to Exan PatientAccess.
   
   For instructions on granting patients access to Exan PatientAccess, see *Granting Patients Access to Exan PatientAccess* on page 28.

3. Making an iForm available to a patient.
   
   For instructions on making a form available to a patient, see *Making an iForm Available to a Patient* on page 31.

See *Setting Up Messages for axiUm Users and Patients* on page 34.

### 1 Marking an EPR Form as an iForm

When you mark EPR forms as iForms (online forms), you are making axiUm forms available to be viewed and/or edited in Exan PatientAccess. For example, a Medical History form created in axiUm, when marked as an iForm, becomes available in Exan PatientAccess.
An iForm is an online form. To make forms available in Exan PatientAccess, you must set up EPR forms as iForms.

▼To mark an EPR form as an iForm:

1. Click (Maintenance) to display the Maintenance module.

2. Click the EHR tab.
3. Double-click the **EPR Form Setup** icon to open the EPR Form Setup window.

![EPR Form Setup Window]

- **Owner Type**
- **Available in iForms**

4. From the list view, highlight a form. For example, we will select EPR Medical History.

   ![Form List]

   *Make sure the selected form has the Owner Type drop-down field displaying the EPR option. An EPR form displaying any other option in the Owner Type drop-down field cannot be viewed in Exan PatientAccess.*

5. Select the **Available in iForms** check box.

6. Click **Modify Record**.

   axiUm saves your changes. In this example, the Medical History form is now available as an iForm.
Now that you have made an EPR form available in Exan PatientAccess, you must:

Make at least one page of a form available online. For instructions on making EPR form pages available in Exan PatientAccess, see Making Pages of a Form Available in Exan PatientAccess on page 20.

Make at least one question on that page available in Exan PatientAccess. For instructions on making specific questions available in a form, see Making Questions in an EPR Form Available in Exan PatientAccess on page 23.

1.1 Making Pages of a Form Available in Exan PatientAccess

After you have made an EPR form available in Exan PatientAccess, you must do the same for at least one page of the EPR form.
To make an EPR form page available in Exan PatientAccess:

1. Set up an EPR form for use in Exan PatientAccess.

   For instructions on making EPR forms available in Exan PatientAccess, see Marking an EPR Form as an iForm.

2. In the EPR Form Setup window, highlight a form in the list view. For example, we will enter EPR, Medical History.

3. Click (Form Definition).

   The Form Pages window is displayed.
4. From the list view, highlight a page. For example, we will enter Page 1, Medical History.

5. Select the Available in iForms check box.

6. Click (Modify Record).

axiUm displays the following message:

Only those questions with answer types yes/no, text, number, list, date, or long text can be made available in iForms. Questions with answer types image, calculated, or attachment cannot be made available in iForms.

Some questions on a page may be answered only by providers.

7. If:
   - All questions can be answered by the patient, click the Yes button.
   - Some questions need to be answered by a provider, click the No button.

axiUm saves the changes.

You have now made a page of an EPR form available in Exan PatientAccess.

You can also make specific questions available in iForms. See Making Questions in an EPR Form Available in Exan PatientAccess on page 23.
1.2 Making Questions in an EPR Form Available in Exan PatientAccess

Before you can specify questions in an EPR form for use in Exan PatientAccess, ensure that you have made an EPR form available for online access. See *Marking an EPR Form as an iForm* on page 17.

Only those questions with answer types yes/no, text, number, list, date, or long text can be made available in iForms. Questions with answer type images, calculations, or attachments cannot be made available in iForms.

To specify EPR form page questions for online access in Exan PatientAccess:

1. Set up an EPR form for use in Exan PatientAccess.

   For instructions on making EPR forms available in Exan PatientAccess, see *Marking an EPR Form as an iForm* on page 17.

2. In the EPR Form Setup window, highlight an item in the list view. For example, we will select the code EPR, Medical History.
3. Click (Form Definition) to display the Form Pages window.

4. From the list view, highlight a form. For example, we will select page 1, Medical History.
5. Click **Form Page Definition** to display the Form Page Definition window.

6. Double-click a question from the list view. For example, choose Are you under a physician’s care?

   Depending on which item you select, the following windows display:

   - Form Item - Heading window. For information on the Form Item - Heading window, refer to the axiUm Reference Manual for Maintenance and see **Form Item - Heading Window** on page 188.
   - Form Item - Question window. For information on the Form Item - Question window, refer to the axiUm Reference Manual for Maintenance and see **Form Item - Question Window** on page 190.
   - Form Item - Checklist Item window. For information on the Form Item - Checklist Item window, refer to the axiUm Reference Manual for Maintenance and see **Form Item - Checklist Item Window** on page 214.
   - Form Item - Additional Info window. For information on the Form Item - Additional Info window, refer to the axiUm Reference Manual for Maintenance and see **Form Item - Additional Info Window** on page 216.
Because our example is a question, the Form Item - Question window appears.

![Form Item - Question window]

7. Click the **Available in iForms** check box.
8. Click the **OK** button.

axiUm saves the changes, closes the window, and returns to the Form Page Definition window.

You have now made a question in an EPR form page available in Exan PatientAccess.

---

**To continue the Exan PatientAccess set up, see Granting Patients Access to Exan PatientAccess on page 28.**

---

### 1.3 Making Default Forms Available to Patient Types

You may have patient types that require patients to complete a default form. For example, all Pre-Doc clinics at a dental institution may require their patients to complete a Medical History form. In axiUm, a Medical History form can be marked as a default form in the PreDoc clinics.

---

**Default forms must be marked as iForms. See Marking an EPR Form as an iForm on page 17.**
To make a default form available to a patient type:

1. From the axiUm application screen, click **Maintenance** to display the Maintenance module.

2. Click on the **Patient** tab.

3. Double-click the **Default iForm Definitions** icon to display the Default iForm Definitions window.

4. Click **Clear Data** to clear the fields.

5. Enter the fields and options. For example, we will enter:
• **Patient Type**: Undergraduate Clinic  
• **Code**: EPR, Medical History  
• **Access**: Full

6. Click ![Add a new Record](image) to add the item to the list view.

---

You have now assigned a default form to a patient type.

### 2 Granting Patients Access to Exan PatientAccess

To enable patients to view and to complete EPR (Electronic Patient Records) forms in Exan PatientAccess, you must complete two more stages.

This section provides instructions on how you grant patients access to Exan PatientAccess, enabling them to:
- View and confirm appointments.
- Update personal information such as contact and address details.
- View medical information including problems, alerts, allergies, and medications.
- Change their user name, password and security questions.
- View contact information and FAQs (Frequently Asked Questions).

▼To grant patients access to Exan PatientAccess:

1. Click (Rolodex) to display the Rolodex module.

2. Search for a patient.

   For example, we will search for Jane Doe.

3. Add the patient record to the selection list.

4. Click (Edit Patient) to display the Patient Info window.

5. Click the Personal tab.

6. Click the (PatientAccess Info...) button.

   axiUm displays the following message:
7. Click the **Yes** button to display the PatientAccess Info. window.

    axiUm automatically generates a user name and encrypted password.

8. Click the **Regenerate** button.
Making an iForm Available to a Patient

1. Click the Save button.

2. To enable a patient to access Exan PatientAccess for the first time, you must provide them with the following:
   - The web address (URL) for Exan PatientAccess.
   - The Patient’s user name. In the example above, patient Drew Evans’s user name is DEvans.
   - The Patient’s password. For example, Drew Evans’s temporary password is 4*A!4z(037.

For more information accessing Exan PatientAccess, see Signing In to Exan PatientAccess on page 87.

To continue the setup process, make an iForm available to a patient. See Making an iForm Available to a Patient.

3 Making an iForm Available to a Patient

When you make an iForm available to a patient, axiUm attaches the form to the patient’s account. Then when this patient signs in to Exan PatientAccess, the patient can view and/or complete the form.
You can make EPR forms available to patients, so that when they sign in to their Exan PatientAccess account a form is available for them to view or to complete. For example, make available a Medical Health form that a patient can complete online before the next appointment.

When a patient completes a form in Exan PatientAccess, axiUm automatically updates the information in the patient’s file and displays the answers in green text. See Sending a Message to a Patient on page 80.

To make an iForm available to a patient in Exan PatientAccess:

1. Click (Rolodex) to display the Rolodex module.

2. Select a patient.

   For example, we will select patient Jane Doe.

3. Click (Edit Patient) to display the Patient Info window.

4. Click the Personal tab.

5. From the Information section, click the (PatientAccess Info...) button to display the PatientAccess Info. window.
6. Click the **iForms** tab.

axiUm displays all available EPR forms. In this example, Jane Doe has a Medical History form in the list of iForms.

7. Highlight an EPR form. For example, highlight the Medical History form.

There may be questions on a form that can be answered only by a provider. If all questions on a form need to be answered by the provider, then you can mark the form as read only.
Selecting “Full” means that the patient can update answers to all questions on the form that are available in iForms.

8. In the Access drop-down list, if you want the patient to:
   - Answer all questions on a form, select **Full**.
   - View the form only, select **Read only**.

9. Click (Add a new Record).

10. Click (Close).

Now when the patient signs in to Exan PatientAccess, the patient will see the selected iForm. For example, Jane Doe will see a Medical History form on the iForms page of her Exan PatientAccess account.

4 Setting Up Messages for axiUm Users and Patients

Setting up messaging between axiUm users and patients involves:

1. Enabling Patients to Send Messages to axiUm users.
2. Enabling axiUm users to Send Messages to a Patient.
3. Setting up assigned providers, patient managers, and faculty.

4.1 Enabling Patients to Send Messages to axiUm Users

A setting in axiUm lets patients send messages to their provider(s) from Exan PatientAccess.

▼To enable patients to send messages to axiUm users:

1. In the **Rolodex** module, go to a patient's Patient Info card, and from the **Personal** tab, click the (PatientAccess Info...) button to display the PatientAccess Info. window.

2. Click the **Can send messages** check box to select it.
Setting Up Messages for axiUm Users and Patients

3. Click the **Save** button.

4. Click **X** (Close) until you exit the Patient Info window.

! To continue the setup for patient messaging, see Enabling axiUm Users to Send Messages to a Patient.

### 4.2 Enabling axiUm Users to Send Messages to a Patient

▼To enable axiUm users to send messages to patients:

1. Go to the **Maintenance** module, and select the **Office** tab.
2. Double-click the **Users** icon.
3. In the **Users List** window, search for and then double-click a provider.
4. From the **Users** window, select the **Additional** tab.
5. Click the **Save** button.  
A message appears prompting you to update all users of this level.

6. Click:
   - **Yes** to allow all users of this level to send messages to patients.
   - **No** to update only the selected provider.

7. Click **Close**.

---

**To continue the setup for patient messaging, see Setting Up Assigned Users.**

### 4.3 Setting Up Assigned Users

When composing messages, patients choose from a defined list of recipients: providers, patient managers, and faculty. To define this list of recipients, you must assign providers, patient managers, and faculty to a patient in axiUm.
Assigning Providers to a Patient

▼ To assign providers to a patient:

1. In the Rolodex module, go to a patient’s Patient Info card. For example, we will open Jane Doe’s patient card.

![Patient Info - Doe, Jane](image)

2. In the Assignment section, click the Providers button.

3. In the Provider Assignments window, click the Provider field (ellipsis).

4. Select a provider.
5. Click the **End Date** drop-down arrow, and select a date on the calendar.

6. Click **(Add a new Record)** to assign the provider to the patient assignment list.

   For example, provider Jenny Simpson has been assigned as a provider to Jane Doe.
7. Click ![Close](Close) until you exit the Patient Info card.

In the Exan PatientAccess CMS, you can configure the type of assigned users that patients are permitted to send messages to. See Defining Recipient Types for Patient Recipient Lists on page 48.

Assigning Patient Managers to a Patient

▼To assign patient managers to a patient:

1. Go to the Rolodex module, and select a patient’s Patient Info card. For example, we will go to Jane Doe’s patient card.

2. In the Assignment section, click the Managers button.
3. From the **Manager Assignments** window, click the **User** (ellipsis) and select a patient manager.

4. Click **(Add a new Record)** to assign the patient manager to the patient assignment list.

For example, patient manager Ross Greenwood has been assigned to the patient Jane Doe.

5. Click **(Close)** until you exit the Patient Info card.

*In the Exan PatientAccess CMS, you can configure which types of assigned users that patients are permitted to send messages to. See Defining Recipient Types for Patient Recipient Lists on page 48.*
Assigning Faculty to a Patient

▼ To assign faculty to a patient:

1. Go to the Rolodex module, and select a patient’s Patient Info card. For example, we will select Jane Doe’s patient card.

2. In the Assignment section, click the Faculty button.

3. From the Faculty Assignments window, click the Faculty User (ellipsis), and then select a faculty member.

4. Click (Add a new Record) to assign the faculty member to the patient assignment list.

For example, faculty member Jan Smith has been assigned to the patient Jane Doe.
5. Click (Close) until you exit the Patient Info card.

In the Exan PatientAccess CMS, you can configure which types of assigned users patients are permitted to send messages to. See Defining Recipient Types for Patient Recipient Lists on page 48.

5 Setting Up Fields on the Personal Information Page

This section covers how to set up:

- Ethnicity codes
- Race codes

5.1 Setting Up Ethnicity Codes

To show ethnicity codes in Exan PatientAccess, you need to set up the codes in axiUm first, and then configure the Ethnicity field in the CMS.
To set up an ethnicity code to populate the Ethnicity answer box in Exan PatientAccess:

1. Go to the "Maintenance" module, and click the "Patient" tab.

2. Double-click (Ethnicity Codes) to display the Ethnicity Codes window.

3. Enter a code in the "Code" field.
4. Enter a description in the "Description" field.
5. From the "Category" drop-down list, make a selection.

6. Click (Add a new Record).
7. Click (Close).

From the Exan PatientAccess CMS, you can disable the Ethnicity field, so that it displays in read only mode as shown below.
For instructions on making the Ethnicity field read only, see *Disabling the Ability for Patients to Edit Their Ethnicity and Race* on page 51 of the Exan PatientAccess CMS.

In edit mode, patients can decline to answer their ethnicity by clicking the “I decline to answer questions about the ethnicity and race” check box. If patients click the “I decline to answer questions…” check box, the text “Declined to answer” populates the Ethnicity and Race fields.

<table>
<thead>
<tr>
<th>Ethnicity:</th>
<th>Race(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declined to Answer</td>
<td>Declined to Answer</td>
</tr>
</tbody>
</table>

For information on related topics, see also:

- *Hiding Ethnicity* on page 52 of the Exan PatientAccess CMS.
- *Configuring Custom Fields* on page 54 of the Exan PatientAccess CMS.

### 5.2 Setting Up Race Codes

To show race codes in Exan PatientAccess, you need to set up the codes in axiUm first, and then configure the Race field in the CMS.

To set up one or more race codes to populate the Race answer boxes in Exan PatientAccess:

1. Go to the **Maintenance** module, and click the **Patient** tab.

2. Double-click **Race Codes** (Race Codes) to display the Race code window.
3. Enter a code in the **Code** field.
4. Enter a description in the **Description** field.
5. From the **Category** drop-down list, make a selection.

6. Click (Add a new Record).

7. Click (Clear Data), and then follow steps 3 to 6 to continue adding new Race codes.

From the Exan PatientAccess CMS, you can disable the Race field, so that it displays in read only mode. For instructions on making the Race field read only, see *Disabling the Ability for Patients to Edit Their Ethnicity and Race* on page 51 of the Exan PatientAccess CMS guide.

For information on related topics, see also *Hiding Race* on page 52 of the Exan PatientAccess CMS guide.

### 5.3 Setting Up Custom Fields

You can set up two types of custom fields on the Personal Information page:

- Custom code field (editable or read only)
- Custom text fields
Setting Up a Custom Code Field

There are 10 custom fields (Patient1-Patient10) that you can display in Exan PatientAccess. You set up custom code fields in axiUm, and then you configure them in the CMS.

To set up an editable custom field:

1. Go to the Maintenance module, and click the Basic tab.

2. Double-click (Custom Fields) to display the Custom Fields window.

3. From the Field drop-down list, select a field. For example, we will select Patient5.

4. In the Description box, enter a description. For example, we will enter Marital Status.

Here, we will configure a field that requires patients to select from a drop-down list.

5. To make a custom field editable, click the Entry is required check box to select it.

6. Click (Add a new Record).

Next, you need to go to Custom Codes to enter the options for the Marital Status drop-down list.

7. Click (Close).

8. Double-click (Custom Codes).

9. From the Custom Codes Type drop-down list, select Patient5 - Marital Status.

This is the field we set up in Custom Fields.

10. In the Code box, enter a code. For example, we will enter Single.

11. In the Description box, enter a description. For example, we will enter Single.

12. Click (Add a new Record).
13. Click (Clear Data).


Now, you need to configure the custom field in the CMS to complete the set up. For instructions on configuring custom fields, see Configuring Custom Fields on page 54 of the Exan PatientAccess CMS guide.

**Setting Up a Custom Text Field**

Setting up a custom text field allows patients to enter free text. You can give a patient the option to complete a custom text field, or require a patient to answer a custom text question. You set up a custom text field in axiUm, and then you configure the custom text field in the CMS.

▼To add a custom text field:

1. Go to the Maintenance module, and click the Basic tab.

2. Double-click (Custom Fields) to display the Custom Fields window.

   ![Custom Fields Window]

   There are five custom text fields that you can display in the Personal Information page (PatientText1 - PatientText5).
3. From the **Field** drop-down, select **Patient Text1**.

4. In the **Description** box, enter a description. For example, we will enter **Other Email Address**.

5. Click the **Entry is required** check box to select it.

6. Click (Add a new Record).

Now, you need to configure the custom text field in the Exan PatientAccess CMS to complete the setup. For instructions on configuring custom text fields, see *Configuring Custom Text Fields* on page 55 of the Exan PatientAccess CMS guide.
MANAGING PATIENT ACCOUNTS

You manage Exan PatientAccess accounts using the axiUm Rolodex and Maintenance modules.

In the Rolodex module, in the PatientAccess Info. window, you can perform tasks that include:

- Resetting passwords for patients.
- Unlocking patient accounts, or preventing patients from accessing their online accounts.
- Managing a patient’s iForms.

See Opening the PatientAccess Info. Window on page 50.

Using other axiUm modules, you can:

- Manage security questions, such as viewing, adding, and deleting the security questions that are available to patients. See Managing Security Questions on page 75.
- Update a patient’s personal information. See Updating a Patient’s Personal Information on page 79.
- View a patient’s iForm answers. See Viewing a Patient’s Form Answers on page 61.
- Define the maximum number of columns on a spreadsheet, allowing patients to delete columns, edit column headers, and reset spreadsheets. See Defining the Maximum Number of Columns on a Spreadsheet on page 64.
1 Opening the PatientAccess Info. Window

▼ To open the PatientAccess Info. window:

1. Click the (Rolodex) module, and select a patient. For example, we will select Jane Doe.

2. Click (Edit Patient) to display the Patient Info window.

3. From the Information section, click the (PatientAccess Info...) button to display the PatientAccess Info. window.
2 Resetting Passwords for Patients

When patients lose or forget their passwords, you can reset their passwords in axiUm. axiUm creates a temporary password that patients will change once they sign in to Exan PatientAccess.

This temporary password is one-way encrypted when it is stored in axiUm; therefore, you can reset it, but not retrieve it. When patients reset their passwords, they must choose a different password from the temporary password and they may be prevented from using previously-used passwords.

To reset a patient’s password:

1. Open the PatientAccess Info. window.

   For information on opening the PatientAccess Info. window, see Opening the PatientAccess Info. Window on page 50.
2. Click **Regenerate**.

axiUm generates a new password.

3. Click **Save** to save the changes.

4. Click **(Close)** to return to the Patient Info window.

3  Unlocking/Locking Patient Accounts

Depending on your dental institution’s Exan PatientAccess setup, patients may be automatically locked out of their accounts if they have entered an incorrect password too many times in a row.
Conversely, you can take away a patient’s access to Exan PatientAccess by manually locking a patient’s account.

**To unlock/lock a patient’s account:**

1. Open the **PatientAccess Info. window**.
   
   See *Opening the PatientAccess Info. Window* on page 50.

2. Click the **Account** tab.

3. Do one of the following:
   
   - If a patient has been locked out because of incorrect password entry, click the **Is locked** check box to unlock a patient’s account.
   - If you want to lock a patient’s account, click the **Is locked** check box to lock a patient’s account.

4. Click the **Save** button.

5. Click (Close) to return to the Patient Info window.

### 4 Granting Authorized Representatives Access to Patient Accounts

Designated representatives can access the health information of patient(s) that they represent; for example, a parent may want to view or change a child’s account details online. Authorized
representatives can log in to their own account (if they are a patient), and can choose to view their own information, or view the account of a patient that they represent.

To grant an authorized representative access to a patient’s account:

1. Go to the **Rolodex** module, and add a new patient, or select a patient who requires an authorized representative.
2. Open the patient’s **Patient Info** card, and then click the **Guarantor** tab.

   In our example, the guarantor is an existing patient.

3. Click **(Clear Data)**.
4. Click the **Select Guarantor...** button.
5. From the **Guarantor Rolodex**, select a guarantor.
6. Click the **Primary Guarantor** check box.
7. Click **(Add a new Record)** to add the guarantor to the list. In this example, we have added Derek Findlay (father) as a guarantor for David Findlay.

8. Click the **Personal** tab.
9. Click the **(PatientAccess Info...)** button to open the PatientAccess Info. window.
10. Click the **Representatives** tab.

11. From the **Guarantor** drop-down list, select a guarantor. For our example, we will select Derek Findlay.

12. Click **(Add a new Record)** to add the guarantor to the list of guarantors.

![Example of adding a new guarantor](image.png)

13. Click the **Regenerate** button to generate a temporary password, and then click **(Modify Record)**.

The guarantor will use the temporary password to sign in to Exan PatientAccess to set up his authorized representative account.

For information on related topics, see also:

- *Signing In as an Authorized Representative* on page 95.
- *Hiding a Page from Authorized Representatives* on page 17.
- *Limiting Patient Account Access to Authorized Representatives* on page 56.
5 Limiting Patient Account Access to Authorized Representatives

When access to a patient account is limited to authorized representatives, that patient can no longer sign in to their account.

To limit a patient account’s access to only authorized representatives:

1. Go to the Rolodex module, and select a patient.

2. Click (Edit Patient) to display the Patient Info card.

3. Click the (PatientAccess Info...) button to display the PatientAccess Info. window.

4. In the Account tab, click the No access (only accessible by Representatives) check box.

5. Click (Modify Record).

Now when the patient attempts to sign in, a message similar to the message below is displayed in the Login box:
6 Managing a Patient’s iForms

You can manage a patient’s iForms in the following ways:

- Mark an iForm as read-only
- Mark an iForm that requires a patient’s attention
- Verify that a patient has read an iForm
- View a patient’s iForm answers
- Delete an iForm from a patient’s account
- Define the maximum number of columns on a spreadsheet

6.1 Marking an iForm as Read Only

axiUm allows you to assign a read only status to a form displayed in Exan PatientAccess.

▼To mark a patient’s iForm as read-only:

1. Open the PatientAccess Info. window, and click the iForms tab.

   For instructions on opening the PatientAccess Info. window, see Opening the PatientAccess Info. Window on page 50.
2. Click **(Clear Data)**.

3. From the **Code** drop-down list, select a form. For our example, we will select the **Medical History** form.

4. From the **Access** drop-down list, select **Read only**.

5. Click **(Add a new Record)**.

   In our example, the Medical History form is added to the list of forms for a patient.
6. Click (Close).

Now, when the patient (D. Evans) signs in to Exan PatientAccess, a read-only form is displayed on his Form List page. Read-only forms are marked with a padlock indicator on the Form List.

A padlock indicator also appears on every page of a read-only form to remind the patient of the form’s read only status. All areas on a read-only form page are disabled. After viewing a read only form, patients click the “Mark as Viewed” button to inform axiUm users that they have viewed the form.

### 6.2 Marking a Form to a Patient’s Attention

If you want a patient to view and/or complete a form before an upcoming appointment, you can mark a form to a patient’s attention. When you mark a form to a patient’s attention the form is displayed on the patient’s Form List page:
To mark a form to a patient’s attention:

1. Open the **PatientAccess Info. window**, and click the **iForms** tab.

   For instructions on opening the PatientAccess Info. window, see *Opening the PatientAccess Info. Window* on page 50.

2. Click ![Clear Data](image)

3. From the **Code** drop-down list, select a form. For our example, we will select the Medical History form.

4. From the **Access** drop-down list, select **Full**.

5. Click the **Requires patient’s attention** check box.

6. Click ![Add a new Record](image)

   In our example, the Medical History form is added to the list of forms for a patient.

7. Click ![Close](image)

   Now, when the patient (T. Baker) signs in to Exan PatientAccess, a form marked to his attention (with a green background) is displayed on his Form List page.
6.3 Verifying a Patient Has Read a Form

You can verify that a patient has viewed a form that you have attached to their account.

▼To verify that a patient has read a form:

1. Open the PatientAccess Info. window, and click the iForms tab.

   For instructions on opening the PatientAccess Info. window, see *Opening the PatientAccess Info. Window* on page 50.

2. In the list view, look at the Change Date next to the form you want to verify. The example below shows that Drew Evans updated his medical history on 6/02/2014.

6.4 Viewing a Patient's Form Answers

axiUm lets you view form answers that patients have entered in Exan PatientAccess
To view a patient’s form answers:

1. Go to the **Rolodex** module, select a patient. For example, we will select **Jane Doe**.
2. Go to the **EHR** module, and click the **Forms** tab.

3. In the **Forms on File** window, double-click a form. For our example, we will select the Medical History form.

The patient’s answers to a form display in green text. For example, the patient’s Medical History form responses (entered in Exan PatientAccess) are shown in green text.

### 6.5 Deleting a form from a Patient's Account

When you delete a form from a patient’s account, you are removing a patient’s access to the form. The form remains available in axiUm’s EHR, and has not been deleted.
To delete a form from a patient’s account:

1. Open the **Patient Access Info.** window.

   For instructions on opening the Patient Access Info. window, see *Opening the Patient Access Info. Window* on page 50.

2. Select the **iForms** tab.

3. Open a form. For example, we will open the **Medical History** form.

4. Click (Delete Record).

   axiUm displays the following message:

   ![Delete Confirmation Message](image)

5. Click the Yes button.

   axiUm deletes the record from the list view.

6. Click (Close) to return to the Patient Info window.
You have now deleted an iForm from a patient’s Exan PatientAccess account.

6.6 Defining the Maximum Number of Columns on a Spreadsheet

You can define the maximum number of columns allowed on a spreadsheet. If you enter a number in the Maximum # of Columns field that exceeds the number of pre-defined columns:

- Depending on the configuration of a spreadsheet’s predefined columns, patients may also add one or more columns.
- Patients may also edit column headers and delete columns.
- Patients can always reset a spreadsheet to its original (unanswered) state.

To define a maximum number of columns on a spreadsheet:

1. Go to the Maintenance module, and click the EHR tab.

2. Double-click (EHR Form Setup).

3. In the EPR Form Setup window, click on a spreadsheet in the list view.

   For example, we will select the Suitable Appointment Times For Attending Dental Clinic spreadsheet.

4. In the Form Pages window, click on a page in the Description list view.

5. Click (Form Page Definition).

6. In the Form Page Definition window, select the spreadsheet parent question, and then click the Edit Record button. Alternatively, you can double-click the parent question.
7. In the **Form Item - Question** window, click the **Column Details** button.

The Form Column Details window is displayed.
If you enter a number in the Maximum # of Columns field that exceeds the number of pre-defined columns, patients will be able to add one or more columns. For example, we have entered 6 in the Maximum # of Columns field, but we have predefined only five columns. This means that patients have the ability to add one column to the spreadsheet.

To give patients the ability to add an unlimited number of columns simply leave the Maximum # of Columns field blank.

8. Click the Pre-defined Columns button.

The Pre-defined Columns window is displayed.

Use this window to set up and allow patients to edit predefined column headers, and to delete predefined columns.

9. Click on the Column Heading Text list view, and select a column heading.

In this example, we will allow patients to edit and delete the “Monday” column in the Suitable Appointment Times for Attending Dental Clinic spreadsheet.

10. Click the Column Heading Text that can be edited by the user check box.

This enables patients to edit the column heading for this predefined column.

11. Click the Column can be deleted by the user check box.

12. Repeat steps 9 to 11 to enable other column headings to be edited and columns to be deleted.

13. Click (Modify Record).

14. Click (Close).
15. Click the **OK** button twice.

16. Click (Close) until you exit the iForm setup.

In Exan PatientAccess, the “Suitable Appointment Times for Attending Dental Clinic” spreadsheet displays as follows:

![Suitable Appointment Times For Attending Dental Clinic](image)

6.7 **Disabling the Ability for Patients to Edit an Approved Form Answer**

When you disable the ability for patients to edit a form question answer approved by an instructor, the answer is displayed in Exan PatientAccess as read only.

▼ **To disable the ability for patients to edit an approved form question answer:**

1. Go to the **Maintenance** module, and double-click (EPR iForm Setup).
2. Open a form. In our example, we will open the Medical History form.
3. Open a form page. We will select the Medical History page.
4. Double-click a question. We will click the "Drugs taken on a regular basis" question.

Note the "Approved answer can be changed by users who 'Require Approval'" check box.
Managing a Patient’s iForms

When the "Approved answer can be changed by users who 'Require Approval’" check box is:

- Not checked for a question on an iForm, the question is displayed as read only if there is an approved answer for it.
- Checked for a question on an iForm, patients may overwrite approved answers.

5. Make sure the Approved answer can be changed by users who 'Require Approval' check box is cleared.

6. Click the OK button.

Now, when the form question answer is reviewed and approved in axiUm, the question answer displays in Exan PatientAccess as read only. The example below shows the patient’s approved answer as “Recreational Only” that appears as read only in blue text.

```
8 Drugs taken on a regular basis:

Recreational Only
```

6.8 Disabling the Ability for Patients to Edit an Approved Spreadsheet Answer

When you disable the ability for patients to edit an approved spreadsheet question answer, the answer is displayed in Exan PatientAccess as disabled (grayed out).

▼To disable the ability for patients to edit an approved spreadsheet answer:

1. Go to the Maintenance module, and double-click (EPR iForm Setup).
2. Open a spreadsheet form. We will select the Patient Demographics form.
3. Open a form page. We will select the Patient Demographics page.

4. Double-click a form item spreadsheet row. For example, we will click "Date of Birth".
5. Click the Approved answer can be changed by users who ‘Require Approval’ check box to clear it.

6. Click the OK button.

Now, when the spreadsheet answer is reviewed and approved in axiUm, the “Date of Birth” question answer “Jan 28, 1980” displays in the spreadsheet in Exan PatientAccess as disabled (grayed out) as shown in the example below.
6.9 Making a Patient’s Spreadsheet With Approved Answers Read Only

You can make a spreadsheet that contains approved patient answers read only.

▼To make a spreadsheet with approved answers read only:

1. Go to the Maintenance module, and click the EHR tab.

2. Double-click (EPR iForm Setup).
3. Open a spreadsheet. Our example uses the Patient Demographics spreadsheet.

4. Open a Form page.
5. Double-click the parent question for a form.

6. Click the **Approved spreadsheet can be changed by users who 'Require Approval'** check box to clear it.
In Exan PatientAccess, the spreadsheet is displayed as read only (if it contains approved answers).

7 Managing Security Questions

Internet security questions are displayed in the PatientAccess Info. window and are used for verifying patient identification over the phone. For example, when patients call their institution to reset their password.

This section covers the following:

- Viewing security questions in axiUm
- Adding security questions in axiUm
- Removing security questions in axiUm
- Viewing a patient’s security questions.
7.1 Viewing Security Questions in axiUm

▼To view security questions in axiUm:

1. Go to the (Maintenance) module, and click the Office tab.

2. Double-click (Internet Security Questions) to display the Internet Security Questions window.

You have now opened the Internet Security Questions window.
7.2 Adding Security Questions in axiUm

To add a security question in axiUm:

1. Click (Maintenance) module, and click the Office tab.


3. In the Question field, enter a question. For example, we will enter What is your favorite film?

4. Click (Add a new Record).

The new security question is displayed in the Internet Security Questions window.

5. Click (Close).
axiUm saves the new security question and makes it available in Exan PatientAccess.

![Security Questions in axiUm](image)

### 7.3 Removing Security Questions in axiUm

To remove a security question in axiUm:

1. Go to the **(Maintenance)** module, and click the **Office** tab.
2. Click **(Internet Security Questions)**.
3. In the **Question** list box, select a question that you want to remove.
4. Click **(Delete Record)**.
5. Click **(Close)**.

### 7.4 Viewing a Patient's Security Questions

When a patient signs in to Exan PatientAccess for the first time, they must add three internet security questions and corresponding answers. These security questions are created by the dental institution in axiUm and selected by the user in Exan PatientAccess. The dental institution cannot select the questions for the patients.

Internet security questions are displayed in the PatientAccess Info. window and used for verifying patient identification over the phone.
To view a patient’s security question:

1. Open the PatientAccess Info. window.

   For instructions on opening the PatientAccessInfo. window, see Opening the PatientAccess Info. Window on page 50.

2. Click Security Questions to display the Security Questions window.

   ![Security Questions Window](image)

   The patient selected these questions in Exan PatientAccess, and the answers they entered are created by the patient.

3. Click (Close) to return to the PatientAccess Info. window.

8 Updating a Patient’s Personal Information

A patient may mark their personal or insurance information as incorrect in Exan PatientAccess. Then when an administrator selects the patient from the Rolodex module’s patient selection list, axiUm displays a sticky note indicating that the patient’s information is incorrect (it may be information other than the address, such as birth date). As the text on the sticky note can be customized, you may view a sticky note message similar to the one below:
9 Sending a Message to a Patient

Before users can send messages to patients, they must be enabled in axiUm. See Enabling axiUm Users to Send Messages to a Patient on page 35.

All messages that include patient recipients are encrypted and satisfy HIPAA requirements.

To send a message to a patient:

1. Go to axiUm’s Tools menu, and choose Messenger.

2. From the Messenger window, click (New Message) to display the New Message window.
axiUm users can send messages to patients that they have access to in axiUm, and if users are included in the CC or BCC fields, they can reply to all messages in that conversation.

3. Click the To: (ellipsis).

The Message Recipients window is displayed.

4. From the Recipient Type drop-down list, select Web Patients.

5. In the Criteria box, enter the first letter or letters of the patient's surname and click the Member Name header. For example, we will enter d.

![Select Message Recipients window](image)

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

Alternatively, you can right-click the patient name, and click the Send Patient New Message option in the Rolodex.

6. Click on a patient in the list view, and then click the (Right arrow) button to move the patient to the list of Message Recipients.

Alternatively, from the list view, double-click the required patient record. For example, we will select Doe, Jane.
7. Click (Close) to return to the New Message window.
8. Enter text in the subject and message boxes.
9. If the message is urgent, click the High Priority check box.
10. Click the Send button.
This chapter documents instructions for patients using Exan PatientAccess. The information is included to help administrators answer patient queries on using Exan PatientAccess. You may include some of these instructions in your own documentation for patients.

Because your dental institution has a customized version of Exan PatientAccess, you may not be able to reproduce some of the examples provided in this chapter.

This chapter covers the following topics:

- Self-registering for Exan PatientAccess
- Signing in to/out of Exan PatientAccess
- Viewing appointments
- Using iForms
- Viewing and updating Personal Information
- Managing Messages
- Displaying a list of recent actions in your account
- Viewing Frequently Asked Questions
- Viewing Insurance Information

1 Registering for Access to Exan PatientAccess

Before you can set up an account to access your patient details online, your dental institution must have your email address on record. If your dental institution does not have your email details on record, you will be unable to receive and send emails used to set up the account.
To self-register for Exan PatientAccess:

1. Go to the Exan PatientAccess Home page Login area.

2. Click the Register for Access link to open the Register for Account page.

3. In the Date of Birth drop-down/box, enter your date of birth by either:
• Selecting the month and day from the drop-down lists, and then entering the year.

• Clicking the (Calendar) icon, and then selecting the month, day, and year.

4. In the First or Preferred Name box, enter your first or preferred name.
5. In the Email box, enter your email address.
6. Click the Send Email button.

A message similar to the one below is displayed.

![Register for Account]

The message indicates that:

• You should receive an email shortly, containing a link that will allow you to set up an account.

• If you do not receive an email, check that the first name or preferred name, the date of birth and email address details you entered are correct, and then retry.

• If the details you entered are correct, and you still do not receive an email, you should contact your dental institution.

7. Log in to your email account, and open the email from your dental institution.

The email should contain a link to the registration page where you will set up your account.
8. Click the Create Account button.

You are directed to the Exan PatientAccess Account Registration page.

On first login, if the Terms of Use Agreement page is enabled, you are prompted to agree to the Terms of Use Agreement before continuing.

9. On the Account Registration page:

   • Enter a password in the Password box.
   • Re-enter the password in the Confirm Password box.
   • Select three security questions and three security answers.

10. Click the Submit button.

An email is sent to you confirming that you have registered successfully for Exan PatientAccess.
2 Signing In to Exan PatientAccess

Before you can use Exan PatientAccess, you must first contact your dental institution to receive:

- Your temporary user name and password.
- The Exan PatientAccess web address (URL).

When you sign in to Exan PatientAccess for the first time, you will be asked to change the temporary password that your dental institution has given you.

You may also be required to agree to a Terms of Use Agreement.

▼To sign in to Exan PatientAccess:

1. Go to your web browser, and in the address box enter the web address (URL).
2. Go to the Login area and enter your user name and password details.

💡 Your user name and password are case sensitive.

❗ Depending on your dental institution’s setup, you may be locked out after too many attempts. To unlock your account, contact your dental institution.
3. Click the **Login** button.

You are now signed in to Exan PatientAccess. Depending on your dental institution, you may be required to agree to a Terms of Use Agreement.

4. If a Terms of Use Agreement appears, read the **Terms of Use Agreement**. For example:

---

**Terms of Use Agreement**

Welcome to our Web site. By using our site, you are agreeing to comply with and be bound by the following terms of use. Please review the following terms carefully. If you do not agree to these terms, you should not use this site.

Acceptance of Agreement.
You agree to the terms and conditions outlined in this Terms of Use Agreement ("Agreement") with respect to our site (the "Site"). This Agreement constitutes the entire agreement between us and you, and supersedes all prior or contemporaneous agreements, representations, warranties and understandings with respect to the Site, the content, products or services provided by or through the Site, and the subject matter of this Agreement. This Agreement may be amended at any time by us from time to time without specific notice to you. The latest Agreement will be posted on the Site, and you should review this Agreement prior to using the Site.

Copyright.
The content, organization, graphics, design, compilation, magnetic translation, digital conversion and other matters related to the Site are protected under applicable copyrights, trademarks and other proprietary (including but not limited to intellectual property) rights. The copying, redistribution, use or publication by you of any such matters or any part of the Site, except as allowed by Section 4 below, is strictly prohibited. You do not acquire ownership rights to any content, document or other materials viewed through the Site. The posting of information or materials on the Site does not constitute a waiver of any right to such information and materials. Some of the content on the Site is copyrighted work of third parties.
---
5. At the bottom of the screen, click the **I have read and understood the terms and conditions** check box.

The Acceptance page requires you to accept the terms and conditions before you can use Exan PatientAccess.

You can view the Terms of Use Agreement at any time by selecting the Terms of Use Agreement link at the bottom of the screen.

6. If you accept the terms and conditions, click the **I Accept** check box.

axiUm displays the Update Credentials page.

Exan PatientAccess requires you to change your temporary password to a permanent password.

7. In the **Temporary Password** box, enter the temporary password given to you by your dental institution.

8. In the **New Password** box, enter your password. The characters appear as asterisks for your privacy.

9. In the **Confirm Password** box, re-type your password exactly as typed in the previous step. The characters appear as asterisks.

Please make a note of your user name and password.
Next you are asked to choose three security questions and enter answers to each of these questions. These security questions will be used to validate your identity in the event you forget your password.

10. From the Security Question #1: drop-down, select a question. For example, What is your mother’s maiden name?

11. In the Security Answer #1: box, enter an answer. For example, Anderson.

12. Complete the other security questions and answers. For example:
   - Security Question #2: In what city or town was your first job?
     - Security Answer #2: Vancouver
   - Security Question #3: In what city or town did your mother and father meet?
     - Security Answer #3: Michigan.

13. Click Update to save your information to the database.

You have now signed into Exan PatientAccess and your password and security questions have been updated.

3  Signing Out of Exan PatientAccess

To sign out of Exan PatientAccess, go to the Login area, and click Logout.

4  Requesting a New Password

If you have forgotten your password, there are two ways you may request a new password:

1. If you see a “Forgot Password” link in the Login area of Exan PatientAccess, your dental institution lets you reset your own password. See Resetting a Password on page 92.
2. If you do not see a “Forgot Password” link in the Login area of Exan PatientAccess, you will need to contact your clinic to request a temporary password.

4.1 Requesting a Temporary Password

When you request a password from your dental institution, you will receive a temporary password that you will use to log in to Exan PatientAccess. Once logged in, you will be requested to enter a new password.
To request a temporary password:

1. Go to the Exan PatientAccess website, and click **Contacts**.

   Exan PatientAccess displays the Contacts page with the contact details of your dental institution.

2. Contact your institution for a temporary password.

   This temporary password will be a randomly generated password that you will need to change when you sign in to Exan PatientAccess again.

3. Go back to the Exan PatientAccess website, and in the Login area, enter your user name and temporary password.

4. Click the **Login** button.

   You may be requested to agree to a Terms of Use Agreement.

5. If you accept the terms and conditions, at the bottom of the screen, click the **I have read and understood the terms and conditions** check box.

6. Click the **I Accept** button.

   The Update Credentials page appears.
Exan PatientAccess requires you to change your temporary password to a permanent password.

7. In the **Temporary Password** field, enter the temporary password given to you by your dental institution.

8. In the **New Password** field, enter your password. The characters appear as asterisks for your privacy.

9. In the **Confirm Password** field, re-type your password exactly as typed in the previous step. The characters appear as asterisks.

10. Click the **Update** button to save your new password.

### 4.2 Resetting a Password

If you see a “Forgot Password” link on the Login panel, you can reset your password without the need to contact your dental institution.

*If your dental institution does not have your email address in their records, you cannot reset your password. You will need to contact your dental institution for a temporary password.*
To reset your password using the “Forgot Password” link:

1. In the Login area, click the Forgot Password link.

The Password Reset Request page is displayed, requiring you to enter your Date of Birth, First Name, and email address.

2. In the Date of Birth boxes, enter your date of birth.

   ![Calendar](Calendar) to quickly select your date of birth.

   ![Clear](Clear) to clear your selection.

3. In the First or Preferred Name box, enter your first or preferred name.

4. In the Email box, enter your email address.

5. Click Send Email.

   A message similar to the one below is displayed on the Password Reset Request page:
6. Now sign in to your email account, and look for the email to reset your password.

The email should be similar to the example below:

![Password Reset Request](image)

The email requires you to confirm that you wish to reset your password.

7. Click the **Reset your password** button to confirm that you want to reset your password.
You will be redirected to the Exan PatientAccess website Login where you will see your user name and be able specify a new password.

8. Enter a new password, and then re-enter the new password to confirm it.
9. Click Update to reset your new password.

5 Sign In as an Authorized Representative

As an authorized representative, you have been given access to the account of a patient that you represent. Whether you are an existing patient at the same dental institution as the patient you represent, or a non-patient, you require a temporary password to sign in to Exan PatientAccess. Contact your dental institution if you have not received a temporary password.

To sign in as an authorized representative:

1. Go to Exan PatientAccess, and sign in as an authorized representative using the temporary password.

As the authorized representative, you must agree to the Terms of Use Agreement.

2. Click the I have read and understood the terms and conditions check box, and then click the I Accept button.

3. In the Update Credentials window, enter the temporary password and then enter and confirm the new password.

4. Click the Update button.
The Home page appears displaying a drop-down list with the represented patient. If you are a patient, your name appears in the drop-down list, allowing you to switch between your account and the account of the patient that you represent.

You can now update information about personal information, appointments, forms, and send messages on behalf of the patient that you represent.

6 Confirming and Displaying Appointments

On the Appointments menu, you can:

- Confirm appointments
- Display appointments sorted by date, planned appointments, canceled appointments, and failed appointments.

6.1 Confirming Appointments

You can notify your institution that you are attending an appointment by confirming your appointment in Exan PatientAccess. Appointments with a green background require you to confirm attendance at an appointment.

You can confirm your appointment from the:

- Appointment List page
- Upcoming Appointment page

Confirming an Appointment from the Appointment List Page

▼ To confirm an appointment from the Appointment List:

1. Click the Appointments tab.
2. Click Appointment List.

The Appointment List page shows completed, confirmed, and unconfirmed appointments.
3. Click the **Confirm** button to confirm the appointment.

The dental institution you attend for treatment has been notified that you have confirmed the appointment.

The appointment now shows a confirmed status, indicated in blue text.

Confirming an Appointment from the Upcoming Appointment Page

You can view and confirm the nearest upcoming appointment.

To confirm an upcoming appointment:

1. Click the **Appointments** tab.

The Upcoming Appointment page is displayed if you have an upcoming appointment.
In this example, Jane Doe has a future appointment on August 13 at 4:00 PM with the Provider Jenny Simpson.

2. Click the Confirm button.

The dental institution you attend for treatment has been notified that you have confirmed the appointment.

The appointment now shows a confirmed status, indicated in blue text.

For instructions on confirming an appointment from the Appointment list, see Confirming an Appointment from the Appointment List Page on page 96.
Viewing the Appointment History of an Upcoming Appointment

Appointment History provides the history of the upcoming appointment currently displayed on the Upcoming Appointment page.

▼To show the history of an upcoming appointment:

On the Upcoming Appointment page, click Appointment History.

This example above shows the history of Jane Doe’s upcoming appointment (that she attended that day). Jane Doe’s 9:00 AM appointment was rescheduled to 2:00 PM, which she then confirmed. Also, we can see that she checked-in to her appointment.
6.2 Displaying Appointments

You can display completed, confirmed, and unconfirmed appointments:

- In a list within a specific date range.
- On a calendar view for a specific month.
- On a calendar view for a specific year.

Displaying Appointments in a List

▼To display appointments in a list:

1. Click the **Appointments** tab.
2. Click **Appointment List** to display the Appointment List page.

Appointments for the specified date range are listed here. For example, the Appointment List shows one unconfirmed appointment for Jane Doe.

3. Click **Calendar** to the right of the **Date From**: field to display a monthly-calendar view. Here, you can select a period of time in which to view your appointments (past, present, and future).
For example, Jane Doe wants to view her appointments from 1 August 2013 to 15 September 2013.

4. On the calendar, select the month and year from the Month and Year drop-downs, and then click on the day. For example, select 1 August 2013.

5. Click **Calendar** to the right of the **Date To:** field.

6. On the calendar, select the month and year from the Month and Year drop-downs, and then click on the day. For example, select 15 September 2013.

7. Click the **Submit** button to display a list of appointments within the specified date range.
The example above shows four appointments between 1 August and 15 September, 2013 for Jane Doe.

8. Click an appointment. For example, we will click Jane Doe’s confirmed appointment on August 13, 2013.

Treatments displayed on the Appointment Details page show:

- Who will be performing your dental treatment
- The scheduled duration of the appointment
- The clinic in which the appointment is scheduled
- The type of treatment
- The date the appointment was scheduled
- A list of the treatments to be performed during the appointment

Displaying Appointments in a Monthly Calendar View

To display appointments sorted by month:

1. Click the Appointments tab to display the Appointments page.
2. Select Appointment List to display a list of all appointments.
3. In the View By: field, click Month tab.
4. Click the left or right arrows to select the month. For example, we will select Aug 2013.
The monthly calendar view displays all completed, confirmed, and unconfirmed appointments for the selected month.

For example, the logged-in patient has two appointments for the month of August: one confirmed and one unconfirmed appointment. The yellow indicator on the calendar indicates that the confirmed appointment is today.

5. On the monthly calendar, click an appointment to view appointment details. In our example, we will click Jane Doe’s appointment on August 7, 2013.
Displaying Appointments in a Yearly Calendar View

To view appointments sorted by year:

1. Click **Appointments**.
2. Click **Appointment List** to display a list of all appointments.
3. In the **View By:** field, click the **Year** tab.
4. Click the left or right arrows to select the year. For example, we will select 2012.

The monthly-calendar view displays all completed, confirmed, and unconfirmed appointments for the selected month.
Confirming and Displaying Appointments

Displaying Canceled Appointments

To display canceled appointments:

1. Click Appointments.
2. Click Appointment List.
3. Using the calendar, select the date range for your search.
4. Click the Cancelled check box.
5. Click the Submit button.
Canceled appointments are displayed in gray. For example, the patient canceled an appointment scheduled for September 13, 2013 with provider Jenny Simpson.

**Displaying Failed Appointments**

Failed appointments are appointments that you have missed.

▼ To display failed appointments:

1. Click the **Appointments** tab.
2. Click **Appointment List**.
3. Using the calendar, select the date range for your search.
4. Click the **Failed** check box.
5. Click the **Submit** button to display any failed appointments.

Failed appointments are displayed in gray. For example, Jane Doe failed to show up for her scheduled appointment on August 7, 2013 with provider Jenny Simpson.

**7 Viewing and Completing iForms**

Your dental institution may require you to complete or review a form in Exan PatientAccess before your next appointment. An iForm is a form that you can view online. The form may consist of questions that require you to enter information in text boxes, choose options such as yes/no questions, select dates from a calendar, or enter information in spreadsheets.
This section covers how to:

- View and complete a non-urgent/urgent form
- View a read-only form
- Enter answers on a spreadsheet
- Modify a spreadsheet

### 7.1 Viewing and Completing a Non-Urgent or Urgent Form

▼ To complete a non-urgent or urgent form:

1. Click the **iForms** tab to display the iForms page.
   
   In this example, we will open a Medical History form marked urgent.

2. Click a form to open it.
3. To answer a form question, do any of the following:

- Click inside a field, and enter your text.

The example below shows that we have entered 19 characters out of a possible 32000 characters allowed.
• For drop-down lists, click an option.
• For check boxes, click one or more options.

If a form contains more than one page, for example, a Medical History form that includes a survey page, the current page title displays a down arrow. When you click on the current page title, you can quickly click on a page header to move to another page.

4. After you have finished entering answers:
   • If the form is one page, click the Finish button.
   • If there is more than one page to complete, click the Save and Continue button.

If you have not completed all fields on the form page, you will be prompted to save an incomplete form.

5. If you want to:
   • Save an incomplete form, click the Save and Continue button.
   • Return to the form and complete the missed questions, click the Cancel button, then complete the missed questions and click the Finish button (or the Save and Continue button if not on the last page). Unanswered questions are marked with an incomplete marker.

A pop-up confirms that your Medical History form has been updated in the system.
Next time you sign in to Exan PatientAccess, you can view the completed form. The example below shows that the Medical History form was last updated on Jan 10, 2014.

7.2 Viewing a Read Only Form

Your dental institution may send you a read only form for you to read before your next appointment. When you open a read only form, a padlock indicator displays at the top of each page and all question and answer fields are disabled.

▼To view a read only form:

1. Click iForms tab to display the iForms page.
2. Open a read only form. For example, we will open Jane Doe’s read only Medical History form.
3. Read through the form.

4. After you have read through the form, click the **Mark as Viewed** button.

   Exan PatientAccess displays the following message:

   ![Message](image)

   Once you click the Mark as Viewed button, your dental institution is notified that you have read the form.

### 7.3 Entering Answers on a Spreadsheet

You may be required to enter answers on a spreadsheet form that include these answer types:

- Text
- Yes/No
- Numbers
- Dates (using a calendar)
- Lists
To enter answers on a spreadsheet:

1. Click a spreadsheet question. The example below refers to suitable appointment times for attending the dental clinic.

   ![Spreadsheet Example](image)

2. Click in a column field.

   An edit pop-up appears.

   ![Edit Pop-up Example](image)

3. Enter an answer. For example, we will enter Not available.

4. Click the OK button.

5. Continue filling in fields as necessary.
In this example, we have missed answering some fields.

6. Click the **Save and Continue** button to save the answers that you have entered.

The following message indicates that the form is incomplete.

If you click the:

- **Cancel** button, you return to the spreadsheet to continue filling in the incomplete fields. Fields with missing answers are highlighted in pink.
- **Save and Continue** button, the answers are saved to the database, and if appropriate, the next page of spreadsheet columns is displayed.

In this example, we will save an incomplete form.

7. Click the **Save and Continue** button to save the answers that you have entered.

The next page of the spreadsheet is displayed, and a confirmation message indicates that the changes on the previous page have been saved to the database.

8. Enter answers in the fields on the current page. In this example, we will enter answers in all fields.

When you enter an answer in one of the fields on this page, the Finished button appears.

9. If you click the:
• **Close** button, a warning pop-up prompts you to choose the:
  - **Close** button if you do not want to save the new column header.
  - **Cancel** button if you want to return to the spreadsheet.

• **Finished** button and you have:
  - Not completed all fields on the spreadsheet form, the following pop-up prompts you to click the Cancel button to return to the spreadsheet to continue filling out incomplete fields (highlighted in pink), and then click the Close button, or prompts you to click the Finished button to finish without filling out all fields.
  - Completed all fields on the spreadsheet, the new column header is saved, and the following pop-up confirms your changes.

A pop-up confirms that your changes have been saved to the database.

### 7.4 Modifying a Spreadsheet

In Exan PatientAccess, you can modify a spreadsheet by:

- Adding a column to a spreadsheet (if permitted by your dental institution).
- Editing a column heading (if permitted by your dental institution).
- Deleting a spreadsheet column (if permitted by your dental institution).
- Resetting a spreadsheet.

#### Adding More Columns to a Spreadsheet

If the **Add New Column+** button is enabled (shown in green text with the “+” sign) on the spreadsheet, you can add a new column.

**To add a column to a spreadsheet:**

1. Open a spreadsheet that shows the enabled “Add New Column+” button.

   In our example, we will add a column to the “Suitable Appointment Times For Attending Dental Clinic” spreadsheet.
2. Click the **Add New Column** button.

The Add New Column pop-up appears.

3. Enter a heading for the new column. For example, we will enter *Preferred Day*.

4. Click the **Add New Column** button.

The newly-created column is highlighted with a green background, and a Delete button is displayed above the new column. Now, you can click in the green-highlighted cells and enter some answers.

**Editing a Column Header**

Column headers in black text can be edited while column headers in gray text cannot be edited.
To edit a column header:

1. Click a column header that can be edited.
   The column header pop-up appears.

2. Edit the column header.
3. Click the OK button.

Deleting Spreadsheet Columns

You can delete columns that you have added to a spreadsheet.

To delete a column in a spreadsheet:

1. Open a spreadsheet containing a column that you have added to the spreadsheet.

2. Click the Delete button above the column that you want to delete.
   The following warning message appears.
3. Click the **Delete** button to delete the column.

**Resetting a Spreadsheet**

When you reset a spreadsheet, you are resetting a spreadsheet back to its original (unanswered) state.

▼To reset a spreadsheet:

1. Click the **Reset Spreadsheet** button.

   The following warning is displayed.

   ![Warning message]

2. Click the **Reset** button.

**8 Viewing and Updating Personal Information**

In Exan PatientAccess you may:

- View and update your personal information
- View your medical information
- View your Insurance Policy Information
- Change your user name and password
- Change your security questions and answers
8.1 Viewing Personal Information

To view personal information:

Click the Personal Information tab to display the Personal Information page.
The Personal Information page displays:

- Full Name
- Date of Birth
• Address details
• Email address
• Contact information
• Additional information.

8.2 Updating Personal Information

How you update your personal information depends on your institution. Your institution determines whether you may:

• Mark your personal information as incorrect. In this case, your clinic is notified of your incorrect personal information, and will update your records at your next clinic visit.
• Update your personal information in Exan PatientAccess.
• View (not update) the information.

Notifying Your Clinic That Your Personal Information Requires Updating

You may be allowed to mark your personal information as incorrect.

▼To notify your clinic that your personal information requires updating:

1. Click the Personal Information tab.
2. If your personal information is incorrect, click Mark as Incorrect.

Your institution is notified that you have marked your personal information as incorrect.

At your next dental appointment, dental staff will ask you for your updated information. For security reasons, only dental staff can update your personal information.

Updating Your Personal Information in Exan PatientAccess

▼To update your personal information in Exan PatientAccess (if permitted):

1. Click the Personal Information tab.
2. Click in any of the fields where your information is incorrect, and type your changes.
3. Click Submit Changes.

A message appears indicating that your information has been updated.

8.3 Viewing Medical Information

You can view the following medical information:

- A list of your dental and medical problems
- Your current medications
- Any medical alerts
- Any allergy alerts

▼To view medical information:

1. Click the Personal Information tab.

2. Click Medical Information to display the Medical Information page.

   The following example displays a patient’s dental problems and medical issues.
8.4 Marking Medical Information as Incorrect

Depending on your dental institution, you may be able to mark your medical information as incorrect. If you are the policy holder, you may mark your medical information as well as that of your dependents. If you are a dependent, you may mark only your own medical information as incorrect.

There will be a Mark as Incorrect button if your dental institution lets you mark any of the following fields as incorrect:

- Dental Problems
• Current Medications
• Medical Alerts
• Medical Problems
• Allergy Alerts
• Allergies

▼To mark medical information as incorrect:

On the Medical Information page, click the **Mark as Incorrect** button in the field that shows the incorrect information.

### 8.5 Viewing Insurance Policy Information

Policy holders and dependents may view insurance and benefit plan information including:

• Insurance information
• Overall family/dependent limit balances for the insurance policies
• Specific policy limit/deductible balances for the selected insurance policy.

▼To view insurance policy information:

1. Click the **Personal Information** tab.
2. Click **Insurance Policy Information**.

![Insurance Policy Information](image)

Exan PatientAccess displays the Insurance Policy Information page. Here you can view both current (active) insurance policies and any future insurance policies. Active policies display in blue text while any future insurance policies display in gray.

3. Click an insurance policy to view more details on the Insurance Policy Details page.
This page displays your insurance plan(s) and the plans of any dependents.

4. If you want to view your specific category/item limit and/or deductible balances, click on the **Specific Limit/Deductible Balances** link.

A table is displayed showing the specific category/item limit/deductible balances for the policy holder.
8.6 Marking Insurance Policy Information as Incorrect

Depending on your institution, you may be able to mark information that is incorrect.

If you are:

- The policy holder, you can mark your information and/or that of your dependents as incorrect.
- A dependent, you can only mark your information as incorrect.

▼ To mark insurance policy details as incorrect:

1. On the Insurance Policy Information page, click on an insurance policy to display the Insurance Policy Details page.

   ![Insurance Policy Details](image)

2. If you want to mark:
• A specific policy as incorrect, click the **Mark as Incorrect** button of the policy holder.

A message similar to the one below appears indicating that your insurance policy information requires updating.

![Insurance Policy Details](image)

• Specific category/deductible balances as incorrect, click the **Specific Limit/Deductible Balances** link.

![Specific Limit/Deductible Balances](image)

A message similar to the one below appears, indicating that your dental institution has on file that your insurance policy information requires updating.

![Specific Limit/Deductible Balances](image)
8.7 Changing Username and Password

Please note that passwords in the system are one-way encrypted for security reasons. Only you know your password, and administrators at your dental institution are unable to recover patient passwords. If you cannot remember your password, see Contacting the Dental Institution for Help on page 142.

To change your Exan PatientAccess username and password:

1. Click the Personal Information tab.
2. Click Change Username and Password to display the Change Username and Password page.
3. In the Current Password box, enter your current password.
4. In the New Password box, enter a new password.
5. In the Confirm New Password box, enter the new password again.

Exan PatientAccess may prevent you from entering previously used passwords.
6. Click **Update** to save your new password.

### 8.8 Viewing/Downloading Your Ambulatory Summary (Medical History)

The ambulatory summary is for the purpose of exchanging medical history information between you and your health provider(s). The summary provides clinical information such as your current medications, allergies, medical problems, medical test results, and a history of your treatments.

In Exan PatientAccess, you can:

- View your medical history information in a browser.
- Download the ambulatory summary in HTML format.
- Download the CCDA (Consolidated Clinical Document Architecture).
- Send your ambulatory summary to a healthcare provider.

#### Viewing Your Ambulatory Summary

You can view your Ambulatory summary in your browser.

▼ **To view your Ambulatory summary:**

1. Click the **Personal Information** tab.
2. Click **Ambulatory Summary**.
3. Click the **View in Browser** link.

#### Downloading Your Ambulatory Summary in HTML Format

The HTML format lets you download your Ambulatory summary as well as print your summary.
To download the Ambulatory summary in HTML format:

1. Click the **Download HTML version** link.

2. Click **Save File**, and then click the **OK** button.
3. Go to your **Downloads** folder, and locate the downloaded HTML file.
4. Double-click the **HTML** file, and then click the **Print** icon.
5. Follow the instructions to print the ambulatory summary.

**Downloading the CCDA Format of Your Ambulatory Summary**

The CCDA Ambulatory summary format is a format that enables you to send your medical information to a health provider.

To download the CCDA:

1. Click the **Download CCDA** button.
2. Click Save File, and then click the OK button.
3. Go to your Downloads folder, and locate the downloaded XML file.
4. Continue the email process.

Sending an Ambulatory Summary to a Provider

You can send your ambulatory summary to a healthcare provider, who is not a member of your dental institution. You will require the provider’s DIRECT address.

▼To send an ambulatory summary to a provider:

1. Obtain the DIRECT address from your healthcare provider.
2. Enter the DIRECT address in the Send to a healthcare provider’s DIRECT Address box.
3. Click the Send button.

If the address is:

• A valid format, PatientAccess sends the message with the ambulatory summary consisting of the readable version (HTML) and the C-CDA version (XML). PatientAccess generates the ambulatory summary and transmits a message with ambulatory summary attached.
• An incorrect format, an error message is displayed.

8.9 Changing Security Questions and Answers

You can change your security questions in the Change Security Questions page.

▼To change security questions:

1. Click the Personal Information tab.
2. Click Change Security Questions to display the Change Security Questions and Answers page.
3. From the Security Question #1 drop-down, select a question. For example, What is your mother’s maiden name?

4. In the Security Answer #1 box, enter an answer. For example, Anderson.

5. Complete the other security questions and answers. For example:
   - Security Question #2: In what city or town was your first job?
   - Security Answer #2: Vancouver
   - Security Question #3: In what city or town did your mother and father meet?
   - Security Answer #3: Michigan.

6. Click Update to save your entries and to display the welcome screen.

9 Sending and Receiving Messages

Depending on your dental institution, Exan PatientAccess may let you send messages to appointment and assigned providers, administrators, and faculty.
Use the Inbox and Sent folders to:

- View Messages
- Compose Messages
- Reply/Reply All to a Message
- Forward a Message
- Delete a Message
- View Sent Messages
- Delete a Message from the Inbox

## 9.1 Viewing Messages

New messages - high priority and regular priority - appear in bold text and the word NEW (in green text) appears above the sender’s name. High priority messages are marked with an !

(Exclamation mark).

To view a message:

From the Message List Inbox folder, click a new message.

The Message Details page is displayed.
9.2 Composing a Message

You can compose a message from:

- The Message List page
- The Message Details page
- The Appointment Details page

Composing a Message from the Message List or Message Details page

▼ To compose a message:

1. Click the Compose button.

   The Compose Message page is displayed.

2. Click inside the To field.
Alternatively, click the Recipients button.

The Recipients window appears. Your dental institution defines your list of available recipients.

3. If the recipient is not visible in the Search list view:
   3.1. From the Search Type drop-down list, select the recipient type.
   3.2. Click inside the Criteria box, and enter the search criteria.
   3.3. From the drop-down, select either First Name or Last Name.
   3.4. Click the Search button.

4. In the Search List, click the check box of the recipient, and click the To>> button to move the recipient to the Recipients list.

5. Click the Done button.

6. On the Compose Message page, 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, type your message.

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

8. Click the **Send** button.

**Composing a Message from the Upcoming Appointments page**

On the Upcoming Appointment page under Appointments, you can compose a message (if permitted by your dental institution).

**To compose a message:**

1. Go to the **Appointments** tab, and click **Appointment List**.

2. Open an appointment.

3. Click the **Compose Message** button.
The Compose Message page is displayed. By default, the Appointment provider is displayed in the “To” field. The secondary provider is also included as a recipient, if available.

4. To add additional recipients, click inside the To field.

Alternatively, click the Recipients button.

The Recipients window appears.

5. If the recipient is not visible in the Search list:
5.1. From the **Search Type** drop-down list, select the recipient type.

5.2. Click inside the **Criteria** box, and enter the search criteria.

5.3. From the drop-down list, select either **First Name** or **Last Name**.

5.4. Click the **Search** button.

6. In the **Search List**, click the check box of the recipient, and click the **To>>** button to move the recipient to the Recipients list.

7. Click the **Done** button.

8. On the Compose Message page, 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 text of the message.

   ![There is a limit of 32000 characters applied to this box.]

10. Click the **Send** button.

9.3 **Replying/Replying All to a Message**

You can reply to the sender of the message as well as to other recipients included in the CC field.

▼ **To reply/reply all to a message:**

1. Open a message from the **Inbox** folder.
2. On the Message Details page, click either the **Reply** button or the **Reply All** button.
3. In the **Message** box, enter the text of the message.
4. Click the **Send** button.
9.4 Viewing Sent Messages

The Sent folder displays a list of sent messages that you can sort in the Date and To fields. When you click the:

- To header, the list of messages is sorted alphabetically by the sender’s first name.
- Sent header, the list of messages is sorted by date.

Click the above headers to switch between ascending and descending order.

▼To view a sent message:

1. On the Message List or Message Details page, click the Sent folder.
2. Click a message to view it.

9.5 Forwarding a Message

▼To forward a message:

1. On the Message List page, click either the Inbox folder or the Sent folder.
2. Click a message to open it.
3. Click the Forward button.
4. Click inside the To box, and from the Search list, click the box next to the recipient, and click the To>> button to move the recipient to the Recipients list.
5. Click the Done button.
6. Type text in the Message box, above the original message.
7. Click the Send button to forward the message to the recipient.

9.6 Deleting a Message

▼To delete a message:

1. In the Message List page Inbox folder, click a message.
   Alternatively, you can click the check box next to a message in the Message List.
2. Click the Delete button.

The following pop-up appears warning that you are about to delete a message:
3. Click the:
   - **Delete** button to delete the message.
   - **Cancel** to return to the Inbox folder.

10 Displaying a List of Recent Actions Performed in Your Account

You or an authorized representative may view a list of recent actions performed in your account; for example, who has viewed or edited your health information, the action taken, and the date and time of the action.

10.1 Filtering Actions in Recent Activity

You can filter one or more actions in Recent Activity; for example, display edit records where you or your authorized representative made some edits in Exan PatientAccess.

▼To filter one or more actions in the Recent Activity list:

1. Click the **Recent Activity** tab.
2. Click the **Action** check boxes to clear the actions that you do not wish to view.
3. Click the **Submit** button.

This example shows that the Recent Activity page has been filtered on the “Edit” action.
10.2 Sorting Recent Activity by Column

You can sort the information on this page by column; for example, sort on the Actions column.

▼To sort recent actions by column:

1. Click the Recent Activity tab.

2. Click a column header.

This example shows the Recent Activity page sorted by action.
11 Viewing Frequently Asked Questions

Your dental institution may provide frequently asked questions and answers that may be helpful to you when you are using Exan PatientAccess.

To view frequently asked questions:

On the navigation menu, select FAQ to display the Frequently Asked Questions (FAQ) page.

12 Contacting the Dental Institution for Help

If you require help in using Exan PatientAccess, or require a new temporary password, you need to contact your dental institution.
To view your dental institution’s contact details:

On the navigation menu, select **Contacts** to display the Contact Us page.

![Contact Us page](image-url)
This section covers troubleshooting issues that you and your patients may encounter while using Exan PatientAccess.

1 Patient Self-Registration

When patients complete the Register for Account page in Exan PatientAccess they are typically directed to the Account Registration page to complete their registration. However, there are instances where patients may receive other emails, and these instances are documented below.

1.1 Patients with an Existing Account and Completed Registration

If patients have already created an account and completed a registration, they will receive an email stating that an existing account exists, and that they can enter their existing user name and password in the Login area; otherwise they should contact their dental institution.
1.2 Patients with a Registered Account but an Incomplete Setup

If patients have already registered an account, but they have not completed the setup, they will receive an email stating that they should contact their dental institution to complete their setup.

1.3 Patients with an Existing Account that is Locked

If patients have an existing account and their account is locked, they will receive an email stating that they have an existing account, which is locked. Patients are instructed to contact their dental institution to unlock their account.
<table>
<thead>
<tr>
<th>Patient Registration Failure</th>
<th>Exan Dental School</th>
</tr>
</thead>
</table>

**Dear Linda Findlay,**

A request to register an account for Exan PatientAccess has been received. An existing account was found, but you cannot use this account because it is locked.

To unlock your account, or if you did not make this request to register an account, please contact us at your earliest convenience.

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*The text in the following email examples may be different from the email text your patients see because your dental institution can customize the text.*