Using axiUm Dental Software in a Dental Hygiene Education Program

2016 ADEA Annual Session & Exhibition

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Kuljit Gandhi
ADEA Conflict of Interest Policy

• Work for Exan, the developers of axiUm Software
• Here to discuss implementation process for EHR’s, not our software
Learning Objectives

1. Discuss benefits of using axiUm dental software in terms of patient records, patient billing, appointment scheduling, student tracking, student grading, and compliance with accreditation standards.

2. Understand the level of on-campus and vendor support that is needed to install and maintain axiUm dental software.

3. Describe how axiUm dental software has been implemented and customized for use in a dental hygiene program.
Pacific University

• Pacific University is a private university located near Portland, Oregon

• We offer undergraduate & graduate programs in the liberal arts, education, business & health professions

• In 2005 our health professions programs included optometry, physical therapy, occupational therapy, professional psychology, physician assistant studies

• In 2006 we added a dental hygiene program & a pharmacy program, and moved our health professions programs to a new campus
BS Dental Hygiene Program at Pacific University

- Our BSDH program opened in August 2006 & graduated our first class in August 2008
- We accept a class of 32 incoming dental hygiene students each year
- We have a 16-chair dental hygiene clinic that is open to the public
- Ours students provide dental hygiene services for over 3700 patients each year
- Our patients are primarily underserved Hispanic adults many of whom do not speak English
Pacific Dental Hygiene Clinic

- Each of the 16 dental operatories has a computer, monitor, signature pad, & swipe card reader
- We have 4 digital intra-oral x-ray units & 1 digital panoramic x-ray unit each with a computer, monitor & swipe card reader
- We have 4 laptop computers on rolling stands for faculty use
- We have 2 desktop computers with monitors & signature pads for dental administrative staff use
Why did we choose to implement a computer-based clinic management system?
New Dental Hygiene Program & Clinic Facility

Support from our CIO & University President

Technical Support from OHSU, School of Dentistry specifically for axiUm
Why did we choose axiUm?
- Electronic Patient Record
- Patient Scheduling
- Billing & Accounts Receivable
- Automated Patient Reminders
- Student Clinical Evaluation
- Student Clinical Requirements
- Quality Assurance Program
- Accreditation Reports
- Research Opportunities
More than 80% of dental schools in North America use axiUm

Dental hygiene schools have been slow to adopt axiUm

Barriers to Implementation
What benefits have we seen from using axiUm as our clinic management system?
Customizable

Specific for Educational Use

Graphics Enhance Learning

Control Access of Patient Records

Control Changes to Patient Records

Clinic Revenue & Reporting

Dental Employers Adopting axiUm

Robust database with storage & retrieval capabilities
What support do we need for using axiUm as our clinic management system?
DENTAL HYGIENE TRANSFORMATION OVER THE YEARS...
Dental Hygiene History

THEN

NOW
Dental Hygiene History

THEN

NOW
Trending: Going Paperless with Clinical Management Software
What is Clinical Management Software?
Two Types of Clinical Management Software

Commercial

Educational
Commercial Management Software

- Practice Management
- Private Dental Clinics
- Limited Data Reporting
- Basic, Non-Educational Tasks
- Minimal Student Management
Educational Management Software

- Compliance with Accreditation
- Assignments & Grades
- Patient Distribution
- Clinical Operations
- Financial Operations
- Quality Assurance
- Student Tracking & Grading
- Patient Records
- Student Tracking & Grading
- Compliance with Accreditation
- Assignments & Grades
- Patient Distribution
- Clinical Operations
- Financial Operations
- Quality Assurance
- Student Tracking & Grading
- Patient Records
Commercial vs. Educational Management Software

Dental Hygiene School + Private Dental Practice Management Software = Square Peg + Round Hole
What should the ideal Clinic Management Software offer for my dental hygiene program?
Dental Hygiene Program Clinical Management Software Should...

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable to Your Dental Hygiene School’s Needs
Dental Hygiene Program Clinical Management Software Should…

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable for Your Dental Hygiene School
Managing Students

Student Activity Monitoring

Approvals

Grading and Student Evaluations
Dental Hygiene Program Clinical Management Software Should...

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable to Your Dental Hygiene School’s Needs
Pulling Data

Generate Reports

Collaboration

Research
Dental Hygiene Program Clinical Management Software Should...

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable to Your Dental Hygiene School’s Needs
Security & Access to Information

- Role-Based Security
- Track & Audit Users
- Patient Data Access Auditing
Dental Hygiene Program Clinical Management Software Should...

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable to Your Dental Hygiene School’s Needs
Clinical Efficiency

- Med Hx.
- Consent Forms
- Tx Entry
- Perio Charting
- Continuing Care
Financial Efficiency

- Clinical Integration
- Billing & Insurance
- Payments
- Reports
Dental Hygiene Program Clinical Management Software Should...

1. Allow You to Manage Students
2. Allow You to Pull Data for Research
3. Control Access to Information
4. Streamline Clinical and Financial Efficiency
5. Be Customizable to Your Dental Hygiene School’s Needs
Customizable

Workflow

Report Fields

Custom

Forms

Views & Access
Pacific University

axiUm System Use
Examples
Student Needs
# Student Needs

![Personal Planner screenshot](image-url)

<table>
<thead>
<tr>
<th>Date</th>
<th>Need</th>
<th>Description</th>
<th>Note</th>
<th>Assigned</th>
<th>Assigned On</th>
<th>Pt Chart</th>
<th>Pt Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/12/20</td>
<td>HYG</td>
<td>Hygiene</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Patient Needs

#### Patient Info - Smith, John

**Personal**
- Additional Fee
- Bill P. Fee: N/A
- Discount
- School
- Health Unit
- Pref. Appt
- Bank Acct#
- Active Date
- Date Closed

**Codes**
- Tax Exempt
- Appointment Fee Exem
- Accept Assignment
- Send Statements
- Free Access
- Requires Treatment Co
- Release of Information
- No Chart Locks
- Paper Chart

**Clinical**

#### Patient Needs

<table>
<thead>
<tr>
<th>Date</th>
<th>Need Code</th>
<th>Description</th>
<th>Assigned</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/09/2015</td>
<td>PK</td>
<td>Prophy</td>
<td>No</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>03/12/2016</td>
<td>HYG</td>
<td>Hygiene</td>
<td>No</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

#### Patient Need
- **Patient**: Smith, John
- **Date**: 03/12/2016
- **Assigned**: No
- **Status**: ACTIVE

**Note**
Patient Assignments

<table>
<thead>
<tr>
<th>Date</th>
<th>Need</th>
<th>Description</th>
<th>Note</th>
<th>Assigned</th>
<th>Assigned On</th>
<th>Pt Chart</th>
<th>Pt Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/12/20</td>
<td>HYG</td>
<td>Hygiene</td>
<td></td>
<td>Yes</td>
<td>03/12/2016</td>
<td>11</td>
<td>Smith, John</td>
</tr>
</tbody>
</table>
### Process of Care

**Pacific University**  
**School of Dental Hygiene Studies**

**Dental Hygiene Process of Care (POC) Procedure Grades Report**

<table>
<thead>
<tr>
<th>Assessment</th>
<th>S</th>
<th>I</th>
<th>U</th>
<th>LE</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health History</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Extra &amp; Intra-Oral Exam</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Need of Radiographs</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Periodontal Evaluation</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Calculus Detection</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Dental Examination</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
<th>S</th>
<th>I</th>
<th>U</th>
<th>LE</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Hygiene Diagnosis</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
<th>S</th>
<th>I</th>
<th>U</th>
<th>LE</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Hygiene Treatment Plan</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
<th>S</th>
<th>I</th>
<th>U</th>
<th>LE</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculus Removal (None or Light)</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Calculus Removal (Mod/Heavy by Quad)</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Plaque &amp; Stain Removal</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

**Student**: (H5546)  
**Date**: 01/01/2016 to 02/25/2016

S = 4 Points (100%)  
I = 2 Points (50%)  
U = 1 Points (25%)  
LE = Does not count
### Student Tracking Reports

#### Patient Experiences by AAP Periodontal Classification & Disease Status

**SR. Class of 2016**

| Subreport: Patient Experiences by AAP Periodontal Classification Disease Status | 02/18/2016 |

<table>
<thead>
<tr>
<th></th>
<th>Healthy/Gingivitis</th>
<th>Mild Active</th>
<th>Mild Maintenance</th>
<th>Moderate Active</th>
<th>Moderate Maintenance</th>
<th>Mod w/Loc Severe or Gen Severe</th>
<th>Total Patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior (Fall/Spring)</td>
<td>Minimum = 2/7</td>
<td>Minimum = 3/4 (1/2 active)</td>
<td>Minimum = 3/4 (1/2 active)</td>
<td>Minimum = 1</td>
<td>Minimum = 9/15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior</td>
<td>Minimum = 6</td>
<td>Minimum = 0</td>
<td>Minimum = 0</td>
<td>Minimum = 0</td>
<td>Minimum = 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Petersen, K</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>
Custom Forms
Custom Forms

[Image of Custom Forms software interface with form pages, form page definition, and form questions and answers]
Custom Forms

<table>
<thead>
<tr>
<th>Form Question</th>
<th>Answer</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Medications</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What prescription medications are you currently taking?</td>
<td>None</td>
<td>02/17/2016</td>
</tr>
<tr>
<td>Response</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What non-prescription or over the counter medications are you currently taking?</td>
<td>None</td>
<td>02/17/2016</td>
</tr>
<tr>
<td>Have you ever taken diet drugs such as Phenfen or Redux?</td>
<td>Y</td>
<td>02/17/2016</td>
</tr>
<tr>
<td>Are you taking or scheduled to begin taking other Fosamax, Actonel or bisphosphonates for osteoporosis?</td>
<td>N</td>
<td>02/17/2016</td>
</tr>
<tr>
<td>Have you ever been told you need to take premed before dental treatments?</td>
<td>N</td>
<td>02/17/2016</td>
</tr>
<tr>
<td><strong>Cardiovascular - do you or have you had any of the</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comment:*

Alert: Test, Oscar (M61y4m) 13197
Custom Forms
Forms in Multiple Languages

[Image of forms in multiple languages]
Reporting
# Bank Deposit Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Account 1</th>
<th>Account 2</th>
<th>Transaction Type</th>
<th>Amount</th>
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<tbody>
<tr>
<td>09/24/2015</td>
<td>13291</td>
<td>41428</td>
<td>Debit Card</td>
<td>50.00</td>
</tr>
<tr>
<td>10/06/2015</td>
<td>13359</td>
<td>41738</td>
<td>Debit Card</td>
<td>40.00</td>
</tr>
<tr>
<td>10/29/2015</td>
<td>13359</td>
<td>42326</td>
<td>Debit Card</td>
<td>65.00</td>
</tr>
<tr>
<td>11/10/2015</td>
<td>13359</td>
<td>42613</td>
<td>Debit Card</td>
<td>65.00</td>
</tr>
<tr>
<td>09/29/2015</td>
<td>4149</td>
<td>41542</td>
<td>Debit Card</td>
<td>65.00</td>
</tr>
<tr>
<td>10/20/2015</td>
<td>4149</td>
<td>42153</td>
<td>Debit Card</td>
<td>65.00</td>
</tr>
<tr>
<td>11/10/2015</td>
<td>4149</td>
<td>42633</td>
<td>Debit Card</td>
<td>30.00</td>
</tr>
<tr>
<td>12/01/2015</td>
<td>4149</td>
<td>43079</td>
<td>Debit Card</td>
<td>30.00</td>
</tr>
<tr>
<td>10/20/2015</td>
<td>13405</td>
<td>42137</td>
<td>Debit Card</td>
<td>30.00</td>
</tr>
<tr>
<td>10/27/2015</td>
<td>13405</td>
<td>42267</td>
<td>Debit Card</td>
<td>55.00</td>
</tr>
<tr>
<td>11/16/2015</td>
<td>13405</td>
<td>42756</td>
<td>Debit Card</td>
<td>40.00</td>
</tr>
<tr>
<td>09/14/2015</td>
<td>13263</td>
<td>41124</td>
<td>Debit Card</td>
<td>170.00</td>
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<tr>
<td>12/07/2015</td>
<td>13263</td>
<td>43279</td>
<td>Debit Card</td>
<td>30.00</td>
</tr>
<tr>
<td>10/28/2015</td>
<td>13362</td>
<td>42314</td>
<td>Debit Card</td>
<td>100.00</td>
</tr>
<tr>
<td>12/01/2015</td>
<td>12601</td>
<td>43072</td>
<td>Debit Card</td>
<td>30.00</td>
</tr>
<tr>
<td>11/05/2015</td>
<td>7694</td>
<td>42531</td>
<td>Debit Card</td>
<td>70.00</td>
</tr>
<tr>
<td>09/23/2015</td>
<td>3401</td>
<td>41400</td>
<td>Debit Card</td>
<td>50.00</td>
</tr>
<tr>
<td>09/30/2015</td>
<td>3401</td>
<td>41619</td>
<td>Debit Card</td>
<td>160.00</td>
</tr>
<tr>
<td>11/30/2015</td>
<td>13475</td>
<td>43017</td>
<td>Debit Card</td>
<td>40.00</td>
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<tr>
<td>11/10/2015</td>
<td>10586</td>
<td>42632</td>
<td>Debit Card</td>
<td>80.00</td>
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<tr>
<td>12/01/2015</td>
<td>10586</td>
<td>43037</td>
<td>Debit Card</td>
<td>90.00</td>
</tr>
</tbody>
</table>

### Total Debit Card

10,155.10

### Total Direct Deposits

17,817.10

### Grand Total

130,173.87
## A/R RECONCILIATION REPORT (SUMMARY)

**Includes Unallocated Insurance Payments**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>A/R as at Jun 30, 2015</td>
<td>$17,973.54</td>
</tr>
<tr>
<td>Treatments</td>
<td>127,838.36</td>
</tr>
<tr>
<td>Office Charges</td>
<td>3,091.00</td>
</tr>
<tr>
<td>Patient Payments</td>
<td>-105,972.62</td>
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<tr>
<td>Insurance Payments</td>
<td>-24,201.25</td>
</tr>
<tr>
<td>Patient Adjustments (Credit)</td>
<td>-11,218.96</td>
</tr>
<tr>
<td>Patient Adjustments (Debit)</td>
<td>161.02</td>
</tr>
<tr>
<td>Insurance Adjustments (Credit)</td>
<td>-147.50</td>
</tr>
<tr>
<td>Insurance Payment Adjustments</td>
<td>0.00</td>
</tr>
<tr>
<td>Insurance Adjustments (Debit)</td>
<td>0.00</td>
</tr>
<tr>
<td>A/R as at Mar 11, 2016</td>
<td>$7,523.59</td>
</tr>
</tbody>
</table>
Tips for a Successful Implementation
IMPLEMENTATION TEAM

Considerations:
- Representation from different areas: Clinical, Financial, Administrative, Technical
- Decision Makers: Decision-making abilities
- Time Devotion to Project: Strength of conviction within the school
REALISTIC TIMEFRAMES

Set-up Process

- Configuration
- Customization

Go-Live Date

- Logical break in calendar
- “Quiet Period”
  To absorb a few days of interrupted service to adjust to the new system and processes
BUSINESS PROCESS ANALYSIS

- How does the school currently run
- How will this translate into the software

Opportunity to Review current operations

- Streamline & standardize workflows
- Set up for future success
INSTALLATION & CONFIGURATION

Install Software Test/Dev environment
- Technical support required
- Hardware, peripheral devices

Configuration
- Set up with your codes
- Add forms, necessary reports
- Customization

Training
- Super Users setting up and understanding software
- These are your “Experts”
TESTING & FINAL CHECKS

Should start well in advance of Go-Live

Confirm the following:

- Data accurately converted
- Hardware & database installed and configured
- Training completed successfully
- Business processes are sufficiently supported
- All reports & forms are available and configured in axiUm
- School is ready to Go Live
Thank You