

THE JOINT.
chiropractic

AXIS 

Quick Reference Guide





Getting Started in AXIS

LOGGING IN TO AXIS

1. Go to <https://axis.thejoint.com>.
2. To login, enter your AXIS User ID in the **User Name** field.
3. Enter your password in the **Password** field.
4. Click **Login**.



Important

You must not use anyone else's AXIS login at any time.



Tip/Best Practice

Need password help? Have a team member submit a request through [helpdesk.thejoint.com](#) or follow the forgot password link to reset your own password.



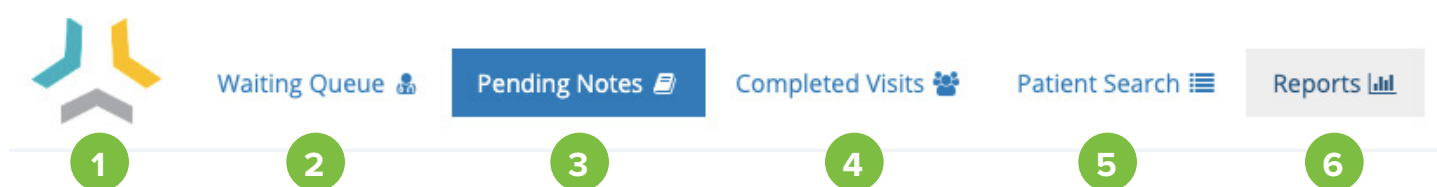
Getting Started in AXIS

LEGEND <NEED CONTENT>



Back Office Basic Navigation

BACK OFFICE - TOP NAVIGATION BAR



1. **AXIS Logo** - Clicking on the AXIS logo will take you back to the home screen..
2. **Waiting Queue** -
3. **Pending Notes** - Default view
4. **Completed Visits** -
5. **Patient Search** - Clicking on the AXIS logo will take you back to the home screen..
6. **Rerports** -



Back Office Basic Navigation

VIDEO - HOW TO SEARCH FOR PATIENTS / ADD PATIENT TO QUEUE





Documenting Patient Visits

PATIENT FILE WINDOW

A. **Patient Information** - an at-a-glance view of the patient.

B. **Left Tabs** - where the doctor can quickly begin documenting a patient's clinical information.

C. **Top Tabs**

D. **Save/Complete**



Documenting Patient Visits

VIDEO - NEW PATIENT / EXISTING PATIENT INTAKE PROCESS





Documenting Patient Visits

ADDING AND APPENDING NOTES

1. Locate the patient record that you would like to add or append notes to using either **Patient Search** or by going to **Completed Visits**.
2. Once you locate the patient record click the Visits tab to display the patient's visit history.
3. Next, click the visit date you wish to view.



Important

The Add/Append Notes option will only display in previous visits.

Patient name: Darci Bland
Gender/age: Female/19
Occupation:
Current plan:
Last visit date: 07-30-2019
Next exam date: 08-13-2019
Treatment: 8 x's for a total of 2 weeks
Visits in Current Treatment: 8/2

[Progress](#) [Visits](#) [Referrals/Do Not Treat](#)

VISITS

May 2019							June 2019							July 2019						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4							1		1	2	3	4	5	6
5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13
12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20
19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27
26	27	28	29	30	31	23	24	25	26	27	28	29	28	29	30	31				
							30													

4. Select the **Add/Append** tab.

[Consult, Exam, Adjustment](#)
[Patient Hx, Activity, Documents](#)

[Current Hx](#)
[Orthopedic](#)
[Neurological](#)
[Vitals/Goals](#)
[ROM](#)
[Adjustment](#)
[Add/Append](#)

5. Enter your comments in the text box.

Enter Additional/Append Notes Below

Enter

Save Note



Documenting Patient Visits

ADDING AND APPENDING NOTES *(con't)*

6. Click **Save Note**.

The appended note will show in the **Saved Additional/Appended SOAP Notes for this Visit** box as shown below.

Saved Additional/Appended SOAP Notes for this Visit		
Date	DC	View details
07-31-2019	Dr. DC	View Details



Documenting Patient Visits

VIDEO - HOW TO ADD / APPEND NOTES





Managing Patient Visits

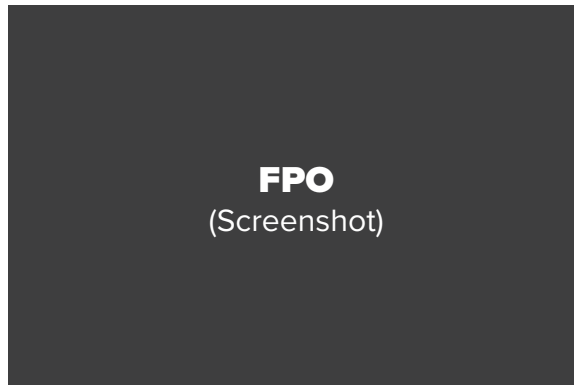
HOW TO TAKE NEW PATIENT

A Subtitle that is Equally AWESOME!

1. From the Front Office bar, click on the New Patient button.
2. Enter the patient's first name and last name in the fields provided.
3. Enter the patient's email address if provided.
4. Enter the patient's key tag number.
5. Enter the patient's birthday in the D.O.B. field.
6. Select the patient's gender.
7. Select an option from the How did you hear about The Joint menu that best describes how the patient learned about The Joint.
8. Click the Next button.

NOTE: You can click the Quick Create button if you don't have time to enter the additional information on the next screen right away. This will add the patient to the Patient Queue immediately. If you click Quick Create, you will complete the remainder of the steps using the Patient Details screen before the patient finishes the consultation, exam and adjustment with the doctor.

9. Enter the patient's address.





Managing Patient Visits

HOW TO TAKE AN EXISTING PATIENT

A Subtitle that is Equally AWESOME!

1. From the Front Office bar, click on the New Patient button.
2. Enter the patient's first name and last name in the fields provided.
3. Enter the patient's email address if provided.
4. Enter the patient's key tag number.
5. Enter the patient's birthday in the D.O.B. field.
6. Select the patient's gender.
7. Select an option from the How did you hear about The Joint menu that best describes how the patient learned about The Joint.
8. Click the Next button.
9. Enter the patient's address.
10. field if there is an apartment or unit number.
11. Select the state from the State dropdown.
12. Enter the city and zip code in the appropriate fields.





Managing Patient Visits

VIDEO - HOW TO ADD NEW PATIENT / EXISTING PATIENT






Compliance

ADDING & DELETING COMPLAINTS

Adding a Complaint

1. To add a complaint use the .
2. From the Add **Complaint** pop-up, select the desired complaint.
3. Click **Save Complaint**
4. The patient's complaints will be saved under the **Complaints** window.

Complaint	Freq.	Pain	X
Complaint Maint Well 2019-06-14 16:02:05	<25%		



Important

Complaints carry over from visit to visit.

Deleting a Complaint

1. To delete a complaint, click the trash can icon as shown.
2. From the pop-up, select a reason from the drop-down menu.

Complaint	Freq.	Pain	X
Complaint Low back stiffness	<25%	0	

Complaint deletion reason for **Complaint Low back stiffness**
2019-07-30 20:21:41

✓ Select an option

- Resolved through care
- Resolved naturally
- Resolved through care by other provider

Cancel Confirm


3. Click **Confirm**.






Compliance



ADDING & DELETING TREATMENT PLANS



Adding/Deleting a Treatment Plan


1. To add a new treatment plan use the .
2. From the Add **New Treatment** pop-up (below), select **Frequency** from the drop-down menu.

New Treatment

Frequency:  1 per week for a Duration:  4 weeks 

Frequency	Duration	Action
2 x's per week	8 week	
1 x's per week	4 week	

3. Then select the **Duration**.
4. Click **Add Item** to add one treatment or create a multi-tiered plan.
5. Click **Save Plan** to add the patient's treatment plan(s) to the **Treatment** window.
6. If you need to **delete a treatment**, click the  and select the trash can  icon of the treatment you wish to remove.
7. Click **Save Plan**. The **Treatment** window automatically updates with the current treatment plan or previous treatment plans, if available.


Treatment 

Current Treatment Plan



Important

Complaints carry over from visit to visit.

Treatment 


Current Treatment Plan

A treatment plan of 2 sessions in 1 weeks was set on 03/28/2019 by Dr. DC.

Visits/Wk	No. of Wks	By DC
2	1	Dr. DC

Previous Treatment Plans

Visits/Wk	No. of Wks	By DC
7	4	Dr. Doctor
2	1	Dr. Doctor

Diagnosis 



Compliance

SELECTING REFERRAL / NO TX

1. On the patient record and from the **Adjustments** tab click the **Referral / No Tx** button under **Palpatory Findings**.

Consult, Exam, Adjustment | Patient Hx, Activity, Documents

Current Hx Orthopedic Neurological Vitals/Goals ROM Adjustment Preview SOAP

Palpatory Findings

BI	L	R	Sub	BI	L	R	Sub	BI	L	R	Sub
C0				T1				L1			
C1				T2				L2			
C2				T3				L3			
C3				T4				L4			
C4				T5				L5			
C5				T6				PEL			
C6				T7				SAC			
C7				T8							
				T9							
				T10							
				T11							
				T12							

New Inj./Acc. Re-Exam **Referral/No Tx**

Spinal Adjustment

C0		T1		L1	
C1		T2		L2	
C2		T3		L3	
C3		T4		L4	
C4		T5		L5	
C5		T6		(L) PEL	
C6		T7		(R) PEL	
C7		T8		(L) SAC	
		T9		(R) SAC	
		T10			
		T11			
		T12			

Areas of Concern

Extremities / Ribs

	L	R
TMJ		
Shoulder		
Sternoclavicular		
Acromioclavicular		
Ribs		
Elbow		
Wrist		
Hip		
Knee		
Ankle		

After treatment patient is:

☐ Same ☐ Better ☐ Worse



Important

All notes need to be completed within 24 hours.



Important

Referral / No Tx notes carry over from visit to visit.

(continued on next page)



Compliance

SELECTING REFERRAL / NO TX *(con't)*

2. Do one of the following:
 - a. If doing a referral select **Referral** from the drop-down.
 - i. Fill in the **Referral Reason** text box. **This box is required.**
 - ii. Fill in the **Referred to** text box.

Palpatory Findings

Bi	L	R	Sub	Bi	L	R	Sub	Bi	L	R	Sub
C0				T1				L1			
C1				T2				L2			
C2				T3				L3			
C3				T4				L4			
C4				T5				L5			
C5				T6				PEL			
C6				T7				SAC			
C7				T8							
				T9							
				T10							
				T11							
				T12							

Required Field

New Inj./Acc.

Re-Exam

Referral/No Tx

Referral / No Tx

Referral

Referral reason

Referred to

(continued on next page)



Compliance

SELECTING REFERRAL / NO TX (con't)

- b. If patient isn't being treated select **No Tx** from the drop-down.
 - i. A **No Treatment Option** pop-up will appear. Click **Confirm** to accept.
 - ii. Give a short explanation in the **No Tx reason** text box why the patient isn't being treated. **This box is required.**
 - iii. You may also wish to fill in the **Areas of Concern** text box under **Spinal Adjustments**.



Important

Selecting No Tx will clear all adjustment values under the Adjustment tab.

Palpatory Findings

Bi	L	R	Sub	Bi	L	R	Sub	Bi	L	R	Sub
C0				T1				L1			
C1				T2				L2			
C2				T3				L3			
C3				T4				L4			
C4				T5				L5			
C5				T6				PEL			
C6				T7				SAC			
C7				T8							
				T9							
				T10							
				T11							
				T12							

Required Field

New Inj./Acc.

Re-Exam

Referral/No Tx

Referral / No Tx

No Tx

No Tx reason



Compliance

SELECTING NEW INJ. / ACC

1. Clicking on the **New Inj./Acc.** button will manually flag that day's visit and label the SOAP notes as **Exam: New Injury/Accident**.

Palpatory Findings

BiLRSUB
C0
C1
C2
C3
C4
C5
C6
C7

BiLRSUB
T1
T2
T3
T4
T5
T6
T7
T8
T9
T10
T11
T12

BiLRSUB
L1
L2
L3
L4
L5
PEL
SAC

New Inj./Acc.
Re-Exam
Referral/No Tx



Important

All notes need to be completed within 24 hours.

2. Once clicked, the other buttons will fade indicating **New Inj./Acc.** has been selected. You will see an alert message indicating the flag has been applied to the patient's SOAP notes. <button not working>



3. Now check the SOAP notes for the flag.



Compliance

SELECTING RE-EXAM

1. Clicking on the **Re-Exam** button will manually flag that day's visit and label the SOAP notes as **Exam: Re-Exam**.

Palpatory Findings

Bi	L	R	Sub	Bi	L	R	Sub	Bi	L	R	Sub
C0				T1				L1			
C1				T2				L2			
C2				T3				L3			
C3				T4				L4			
C4				T5				L5			
C5				T6				PEL			
C6				T7				SAC			
C7				T8							
				T9							
				T10							
				T11							
				T12							

New Inj./Acc.
Re-Exam
Referral/No Tx

2. A message alerts you the flag has been applied to the SOAP notes.



3. Go to **Preview SOAP** to make sure flag was applied to the SOAP notes.

The Joint Chiropractic	Patient Name: Taub,Sloan
Clinic: Temple	DOB: 1979-01-20 - Sex: Male - Age: 40
Address: 3038 S. 31st Street	Patient ID:
Temple, TX, 76502	Chiropractor: Wendy DC
Phone: 2542395302	Date of Service: 2019-08-02 20:36:30

Exam: Re Exam



Important

All notes need to be completed within 24 hours.



Tip/Best Practice

The Re-Exam button will appear highlighted to indicate it has been selected and the other two buttons will dim.



Compliance

DOCUMENTING INFORMED CONSENT

1. Click in the **Subjective** box under the **Patient Information** section.

Patient information **Sloan Taub**



Patient name: Sloan Taub
Gender/age: Male/40
Occupation: IT
Current plan: Plan
Last visit date: 07-30-2019
Next exam date: 08-06-2019
Treatment: 2 x's for a total of 1 weeks
Visits in current treatment: 2/1
Subjective:

Informed consent
goes here

2. Enter one of the following into the **Subjective** box:
 - a. "Reviewed informed consent with patient - The patient understood and had no questions. The patient wants to proceed with care." **OR**
 - b. "Reviewed informed consent with patient - The patient had a question pertaining to _____ (ex: *strain/sprain*). Reviewed research and current literature - The patient was satisfied and wants to proceed with care."
3. Click **Save**



Important

All notes need to be completed within 24 hours.



Take Note

The patient may require different aspects of care which can be documented. Strain/sprain was used as an example.



Compliance

VIDEO - COMPLIANCE





Logging Out of AXIS

LOGGING OUT

1. To log out, hover your cursor over your name in the upper right hand side of the window. A pop-out will appear.
2. Hover your cursor over Log Out.

The screenshot shows the AXIS interface with a top navigation bar containing 'Waiting Queue', 'Pending Notes', 'Completed Visits', 'Patient Search', and 'Reports'. Below this is a 'PENDING NOTES QUEUE' table with columns: Patient Name, Home Clinic, Last Visit, Last DC, Plan, RPV, VTBC, and Actions. Two rows are visible: 'Test Intake' and 'Steve11 Knauf'. To the right, a user profile dropdown menu is open, showing 'Temple Dr. Dc' and options for 'Switch Clinic' and 'Log Out'.

Patient Name	Home Clinic	Last Visit	Last DC	Plan	RPV	VTBC	Actions
Test Intake NEW No Tx PAY		07-24-2019	krysta wc		0	1	<button>Take Patient</button>
Steve11 Knauf NEW No Tx Forms		07-24-2019		Wellness Plan	4	1	<button>Take Patient</button>

3. If you still have patients left in the queue, you may receive the following message. Click **Continue** to log out or **Cancel** to stay logged in.

Warning!

Patients in Pending Queue, do you still want to log out?

Cancel
Continue

4. If you've logged out, please close your browser window.