1. To launch, click on the Overdue Patients icon →

Overdue Patients Main window is displayed:

2. Select the Group, Provider, Reason and year (if applicable) as shown below:

   A. Selecting a Group
   B. Selecting a Provider
   C. Selecting a Reason
3. Click on the **Search** button to generate a patient list.

4. Once a list (of patients) is generated,
   - **Note:** If no date appears in the lower right side of the window beside *Results generated on*, no list will appear until the **Regenerate** button is pressed.

5. A message is automatically sent to selected recipients when an overdue condition occurs, alerting them that **ACTION** must be taken.
Granting Pro-Active Extensions:

1. After you search for the patient you’d like to grant an extension, click on the **Extend...** button.

![Overdue Patients screenshot](image)

*Note: You can select one or many patients at a time.*

2. After **Extend...** is clicked, the Overdue Extensions window is displayed on the screen.

![Overdue Extensions screenshot](image)

*Tool Bar (see below for details)*

*Extensions are displayed here.*
Tool Bar Details:

- Clear Data
- Add a new Extension
- Edit or Modify an Extension
- Delete Extension

Granting Extensions for a specific Overdue Patient record:
If an extension is to be granted for a specific overdue condition in the Overdue Patients window, select the record in the list and click on the “Extend” button.

The patient and provider fields will be pre-populated.
Length of time for the Overdue Patient will be displayed on the record.
Granting Extensions for multiple Overdue Patient records:

In the Overdue Patients window, select the desired records from the list (hold the <Ctrl> key down and click on each line), then click on the “Extend” button.

**Date:** The date the extension is granted.

**Extend Until:** The date the extension ends.

**Extension Of:** Used with Period to indicate the number of days / months for which to grant the extension. The system will calculate this value based on the date specified in “Extend Until”.

**Period:** Used with “Extension Of” to indicate the number of days / months for which to grant the extension. Set to Calendar Days, Clinical Days or Calendar Months. By default, this extension will “Apply to all Overdue Conditions” for the patients selected in the previous window.

A Messenger Module message is automatically sent to selected recipients when an extension is granted, alerting them of the extension.
Further Reading/Reference

A. **Function: PATIENTNOTSEEN Code: NOSEEN**
   Overdue Condition: The patient is overdue for a visit.
   This is the number of days since patient was last seen. This is checked using the patients’ last treatment dates for I/C treatments.

B. **Function: ASSIGNEDBUTNOTXPLAN Code: NOTXPLAN**
   Overdue Condition: The student is overdue in creating a treatment plan.
   This is the number of days since the student has been assigned a patient where there is not an approved treatment added with treatment provider = assigned provider. This is checked for all assigned providers. Students will do this from the dental chart. There may be planned treatment from the diagnosis clinic, but this should not count against the function.

C. **Function: RECALLNOTSEEN Code: RCDUE**
   Overdue Condition: The patient with a recall has not been seen.
   This is the number of days recalls in the past are overdue without the patient being seen. This is checked for all recalls due after that patient's last treatment date. Status codes "Active" field for recall type codes. Recall due date is from recall record; “patient not seen” is checked via finding a completed treatment done). Provider is currently not used in this check - per patient.

A. **Function: PATIENTINACTIVE Code: STSINA**
   Overdue Condition: The patient is overdue to be re-activated.
   This is the number of days that have passed since the patient was made inactive. This looks at the patient field, Patient.StatusStartDate, set when a user changes Patient.Status to an Inactive status (as defined in Maintenance Status codes).

A. **Function: TXPLANOLD Code: TXPOLD**
   Overdue Condition: The patient's treatment plan is overdue.
   This is the number of days since the treatment plan was added. This check is based on approved planned treatment entered in any module of axiUm. It is aged based on date the treatment is added (Trx.TreatmentDate which is not changed by approval nor edits).