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Chart Tracker

87296 - Chart lock problem

**Module:** Chart Tracker

**Problem:** There is a problem with electronic chart locks. In the following scenario:

1. Go to Maintenance module - Office tab - Chart Tracking Locks icon - Chart Tracking Locks window - Chart Tracking Lock Definitions window, and indicate in the three Required Consent fields the consent forms that must be attached to a patient’s record before a user can access that patient's record.

2. Go to Maintenance module - Office tab - Users icon - Users List window - run search - Users window - Additional tab - Charts section. Then go to the following fields:
   - Warnings field: When the chart lock (defined in step 1) is indicated in this field, axiUm displays the Electronic Chart Lock Warning window for this user, listing all three missing consents, and will continue to display this window until all three consents are attached to the patient's record. This is fine.
   - Error field: When the chart lock (defined in step 1) is indicated in this field, axiUm displays the Electronic Chart Lock Warning window for this user, displaying only the first of the three missing consents, and will stop displaying this window when that consent is attached to the patient's record. This user is then able to access the patient record despite two missing consent forms.

**Solution:** Now in the above scenario, all three missing consents are listed in the Electronic Chart Lock Warning window, and all three consents must be attached to a patient’s record before that user can access that patient's record.

92696 - Alternative chart search

**Module:** Chart Tracker ~ Chart Out window

**Problem:** Check out a chart without a request (in the Chart Out window select the Chart Out Without Request checkbox), and select the Search Alt Chart first checkbox. If there are two charts for the same person but one is marked as deleted, axiUm selects the first instance of the alternative chart (the deleted one) and displays the error message, "Chart Requested is for a Deleted Patient".

**Solution:** Fixed. Now in the above scenario, axiUm checks out the correct (active) chart.
85619 - Error printing dispensary receipt

**Module:** Dispensary ~ Dispensary Receipt window

**Problem:** In the Dispensary Billings window (in Dispensary module - Billing button - Providers List window - run a search - select a record - Dispensary Billings window - Receipt button), when you enter the fields and click the Print button, axiUm displays an error message similar to the one below, regardless of the date range entered.

![Error Message](image)

**Solution:** Fixed.

88142 - Database error message

**Module:** Dispensary - Lost Items tab

**Problem:** This only occurs in the Dutch version of axiUm. When you highlight a record from the list view and click the Found button, axiUm displays a database error message.

**Solution:** Fixed.

93109 - Location field resets when form modified

**Module:** Dispensary

**Problem:** axiUm rests the Location drop-down field to the default value if you do one of the following:

- Click on a different tab (e.g. from the Requests tab to the Dispensary Out tab).
- Modify one of the following fields: Provider field, Date From field, and Date To field.
- Open and close a window (e.g., the Check In window).

**Solution:** Now performing any of the above activities no long resets the Location drop-down field.
96524 - Error message on Expiry Date field

Module: Dispensary ~ Sterilize Kits window

Problem: In the Sterilize Kits window (in Dispensary module - Sterilize button), if you enter an invalid date in the Expiry Date field, axiUm displays an error stating that the date must be in the future. This is fine. However, axiUm locks you out and you cannot make any corrections.

Solution: Fixed so that in the above scenario, axiUm no longer locks you out.

---

EHR

69557 - Enforce printing of Rx records

Module: EHR ~ Select Printer window

Problem: In the Select Printer window (in EHR module - Prescriptions tab - [Create a new Record] - Patient Prescription Entry window - enter the fields - [Create a new Record] - Done button), clicking the [close] cancels the print job but still saves the prescription entry. Need to force users to print the prescription before saving it.

Solution: Now clicking the [close] on the Select Printer window cancels the print job, and returns to the Patient Prescription Entry window. To save the prescription entry, you must return to the Select Printer window and print it. Only then axiUm can save it.

---

72555 - EPR forms displaying swipe card information

Module: EHR - Forms tab

Problem: In some cases, when you swipe your card to approve an EPR form, axiUm uses the data on the swipe card as answers. For example, if the cursor is on a Y/N answer field, and you swipe your card (which begins with the letter Y), axiUm takes the letter Y from the swipe and enters it as a Yes answer, and the remaining data on the swipe card is displayed in the Additional Info answer field following that. This could pose a security problem. For example, login information may display on patient forms.

Also, this causes axiUm to ask for patient signature on the form again because the answer has changed.

This problem also occurs in the Evaluations module.

Solution: Fixed in the EHR module. Also fixed in the Evaluations module.
81189 - Redo indicates approval required

Module: EHR ~ Lab Order Details window

Problem: In the Lab Order Details window (in EHR module - Labs tab - double-click item from list view), if you add a lab order and click the Redo button -- but you do not complete the redo by entering something in the Details text box and clicking the Add button, and instead you re-select the line from the list view -- axiUm displays the Approval Required static field, and it should not do this.

Solution: Fixed.

82613 - Lab notes not displaying approval user

Module: EHR - Tx History tab

Problem: If provider1 (requires approval) creates a lab order, and provider2 (has approval rights) approves it, any notes for the lab is stamped with provider1 in the Tx History tab’s Appr. User column.

Solution: Now in the above scenario, axiUm displays provider2 in the Appr. User column.

83505 - Provider field not following Power Admin setting

Module: EHR - Tx Plan tab

Problem: The Provider field does not follow Power Admin settings in the following windows (meaning they are restricted by other means, e.g. provider group):

- Detailed Plan Assign window
- General Plan Assign window
- General Plan Entry window

Solution: Fixed. Now the Provider fields in the above three windows can be enabled/disabled based only on Power Admin settings, and no other settings (e.g. provider group).

83583 - Display problem with clinical template notes

Module: EHR ~ Clinical Note Codes List window

Problem: In the following scenario:

When you access clinical note templates using one of the following methods:

- Go to Maintenance module - EHR tab - Clinical Note Codes icon - Clinical Note Codes List window. From the Type drop-down field, select Template Notes.
- Go to EHR module - (Add a new Note) - Select Note Type window. Select the Template Note option and click OK. Go to the Code field and click (ellipsis) to display the Clinical Note Codes List window.

The following occurs:

- When axiUm initially displays the Clinical Note Codes List window, the Description column displays the first line of the description.
- If you double click or select a line and click to open the Clinical Note Template window and then click the OK button, the Description column displays the entire description (multiple lines of the note).
- If you open and close the Clinical Note Codes List window, axiUm resets the Description column to display the first line of the description again.

**Solution:** Fixed.

---

**83807 - View Chart History window missing header text**

**Module:** EHR ~ View Chart History window

**Problem:** In the View Chart History window (in EHR module - (Show History) - Chart History Settings window - OK button), the Description column does not display the column heading “Description.”

**Solution:** Fixed.

---

**83953 - Error message**

**Module:** EHR ~ Select Clinical Note Codes window

**Problem:** In the following scenario:

1. Go to the Select Clinical Note Codes window (in EHR window - (Add a new Note) - Select Note Type - General Note option - OK button - General Note window - Code field (ellipsis)).
2. Highlight a non-selectable line (i.e., a header).
3. Do one of the following:
   - Click (close)
   - Click the Cancel button
   - Press the ESC key

axiUm displays the message, “This is not a selectable clinical note.” axiUm should only display this message when you try adding this non-selectable line to the Selected Comments section.

**Solution:** Fixed.

---

**84220 - Power Admin settings not being applied**

**Module:** EHR - Tx History tab
Problem: In Power Admin, if the calendar fields are set to read-only in the following windows:

- Edit Planned Treatment
- Edit in Process Treatment
- Complete Treatment

You can still click on the drop-down arrow to display the calendar and change the date field.

Solution: Fixed.

---

84395 - Deleted lines not showing on Preventive Care Dates window

Module: EHR ~ Preventive Care Dates window

Problem: Go to the EHR Options window's Display Options settings (in EHR module - Options/Settings), and select the Show deleted lines checkbox. In the Preventive Care Dates window (in EHR module - Prev Care tab - right-click - Preventive Care Dates option), axiUm does not show deleted items and in some cases change hygiene items to gray.

Solution: Fixed.

---

84691 - Keyboard entry on EPR Forms with Long Text fields

Module: EHR - Forms tab

Problem: In EPR Forms, when you use the spacebar to open an Additional Info type question requiring a Long Text type answer, axiUm does not set the cursor in the answer field, forcing you to mouse-click the field before entering an answer.

Solution: Fixed. Cursor is now in the long text field regardless of how it is opened. This lets you use the spacebar to open an Additional Info type question, and continue using the keyboard to enter the answer.

---

84940 - Memory leak in Preventive Care Dates window

Module: EHR ~ Preventive Care Dates window

Problem: Sometimes, there is a memory leak in the Preventive Care Dates window (in EHR module - Prev Care tab - right-click - Preventive Care Dates option). This may cause, for example, garbage data and crashes.

Solution: Fixed.

---

85047 - Quick List filter procedures needed

Module: EHR ~ Chart Add tab

Problem: Procedures on a quick list should be displayed regardless of the selected provider type's access to procedure codes.

Solution: Fixed. Now when you log onto axiUm as a non-student (based on Provider Type, subtype), there is no quick list filtering based on your provider type. For example, a hygienist can
see procedures they have no access to. If the Details tab displays themselves as the provider (default behavior), axiUm displays an error and will prevent them from adding the treatment, but if they change the provider to someone who has access to these procedures, they can add it.

---

85270 - Calculated ASA score

**Module**: EHR - Forms tab

**Problem**: When entering answers in an EPR form containing an ASA page, axiUm sets the ASA value to 1 even if no ASA-type questions have been answered from that page.

**Solution**: Fixed so that the ASA score remains blank until a question containing an ASA score has been answered.

---

85351 - Problem displaying unapproved, inactive, planned treatment

**Module**: EHR - Tx History tab

**Problem**: Unapproved, inactive, planned treatments does not show the asterisk ( * ) in the Stat column. In the following scenario:

1. Select a planned treatment and approve it.
2. In the Tx Status drop-down field, assign a treatment status that makes the treatment inactive.
   
   This treatment status is defined in the Status Codes window (in Maintenance module - Basic tab - Status Codes icon) where the Type drop-down field displays the Treatment option and the Make Treatment Inactive checkbox is selected.
3. Make changes to the treatment record so that you require another approval.
   
   The Stat column displays the treatment status P (no asterisk), and it should display P* (the asterisk indicating that approval is required).

**Solution**: Fixed so that in the above scenario the Stat column displays P*.

---

85785 - Planned appointments menu problem

**Module**: EHR - Tx History tab

**Problem**: In the following scenario:

1. Highlight a planned appointment.
2. Click in the lower part of the list (where the list is empty). The highlighted line is no longer selected. This is fine.
3. Right-click to display a list of options. axiUm displays active options as if the planned appointment is still highlighted. However, these functions do not work.

**Solution**: Fixed. Now in the above scenario, right-clicking displays all inactive options.
86253 - Extraction of supernumerary

Module: EHR - Chart Add tab

Problem: axiUm has lost the ability to extract a supernumerary tooth even if a regular tooth in that area is gone.

Solution: axiUm has regained this ability again.

86357 - Implant-&-crown macro not working on missing tooth

Module: EHR - Chart Add tab

Problem: If you select a missing tooth and apply a macro procedure code containing both an implant and a crown, axiUm displays a message indicating that the tooth must be present for the crown. axiUm should not display this message because you often plan the two procedures simultaneously.

Solution: Fixed so that if the selected macro procedure code contains an implant procedure code, and you apply this macro to a missing tooth, axiUm no longer displays this message.

86575 - Diagnosis code applied to all treatments

Module: EHR ~ Complete Treatments window

Problem: On the Complete Treatments window (in EHR module - Tx History tab - right-click - Complete Treatments option), the diagnosis code is applied to all selected treatments whether or not the Apply Detail Changes to All Selected Txs checkbox is selected.

Solution: Fixed. Diagnosis is only applied to all selected treatments if the Apply Detail Changes to All Selected Txs checkbox is selected.

86761 - Expert mode disallows entry of macro procedures

Module: EHR - Chart Add tab

Problem: In the Chart Add tab - Expert tab, when you select a tooth or surface, axiUm displays a procedure code Quick List. If you select a macro procedure code from this list, axiUm disables the following icons:

- [ ] (Add Planned Tx)
- [ ] (Add In Process Tx)
- [ ] (Add Complete Tx)

Solution: Now axiUm enables these icons to allow the entry of macro procedure codes in Expert mode.
86788 - Duplicate warnings

**Module:** EHR - Chart Add tab

**Problem:** If you enter a procedure code plus a macro code (containing the same procedure code as the first one), axiUm repeats the duplication warning. For example, if you enter an Exam (D0150), and then a macro code containing one Exam (D0150) and four PA X-rays (D0220), axiUm displays the message, “There is a planned treatment with the same criteria. Are you sure you want to add this treatment?” This is fine. However, it displays the same message for the third and fourth D0220 in the macro code.

**Solution:** Fixed so that in the above scenario, axiUm displays the duplication warning once - only for the first duplicate procedure code that axiUm encounters -- in this case, the second D0220 in the macro code.

Note that duplicate procedure codes that occur within a macro code do not display this warning. This is because the duplication is contained within a macro code, and axiUm assumes you intentionally set this up when you defined the macro code.

---

86812 - Procedure grouping causes incorrect calculations

**Module:** EHR - Tx Plan tab

**Problem:** When you apply a procedure group to multiple surfaces, axiUm calculates incorrectly. For example, if you select the number of surfaces required by the code, axiUm is adding the procedure code and fee on only one surface. Or if you select more surfaces than the code allows, axiUm does not automatically update the code to match the number of surfaces selected.

**Solution:** Fixed.

---

86897 - Error messages

**Module:** EHR - Tx Plan tab

**Problem:** Two problems:

- In the Tx Plan tab, entering a primary-tooth procedure on an adult tooth displays an error message, even if the procedure is part of a procedure group.

- When you edit a treatment (in the Tx History tab) by changing the value of the tooth surface (and keep the same number of surfaces), axiUm displays the message, "Invalid number of surfaces," even though you didn’t change the number of surfaces (just the values). Editing the same treatment the same way using the Chart Add tab - Details tab works fine.

**Solution:** In both scenarios, the error messages no longer displays.

---

87008 - Entry of current medication causes SQL error

**Module:** EHR - Form tab

**Problem:** If you attach an EPR form, and one of the questions is a long-text-type answer containing the reference code RX, axiUm crashes during the refresh process that displays this answer in the Alerts tab’s Current Medications section.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.
87232 - EPR attachment crashes
Module: EHR - Forms tab
Problem: When you attach and EPR form containing an attachment-type question, attaching a file to that question causes axiUm to crash.
Solution: Fixed. Also fixed a similar problem when attaching a file to payments.

87401 - Deselecting EPR checklist item displays associated text
Module: EHR - Forms tab
Problem: In the following scenario:
While entering an EPR form, you answer Yes to a Yes/No question, and this displays the Checklist window. In the Checklist window, there are several checklist items, and selecting one of the checkboxes displays the Additional Info window. In the Additional Info window, you enter some text. You then deselect the checklist item, and select a different checklist item (with no text entered). axiUm displays the text from the deselected checkbox with the name of the selected checkbox.
Solution: Fixed so that deselecting a checklist item no longer displays the associated text in the answer form.

87786 - Refresh problem
Module: EHR - Forms tab
Problem: In some cases, if you change an answer on a form, the scrollbar and the Calculate button disappears. They return if you close the form and re-open it.
Solution: Fixed.

87975 - Preventive Care records not refreshing
Module: EHR - In Progress tab
Problem: When you create/update/delete a preventive care cycle in the Preventive Care Details window (in EHR module - Prev Care tab - right-click - Update Preventive Care Cycle option), axiUm creates/updates/deletes the recall record but does not create/update/delete the Tx History view or the Prev Care tab until you close and re-open the EHR module.
Also, if you add/update/delete a preventive care recall record in the Rolodex module’s Patient Recalls window (in Rolodex module - patient selection list - right-click - Patient Recalls option), the same problem occurs.
Solution: Fixed.
88184 - Checklist in EPR Forms not enabling Approve button

**Module**: EHR - Forms tab

**Problem**: If you answer a checklist-type question by selecting only one checklist item, and you are a user that requires approval for that form, axiUm does not enable the Approve button until you have selected more than one item.

**Solution**: In the above scenario, axiUm now enables the Approve button.

---

88495 - Modifying treatment using incorrect surface information

**Module**: EHR - Chart Add tab

**Problem**: When you modify a treatment, axiUm lets you enter surface information that is incorrect for the procedure code selected. For example, if you select a treatment record containing a 1-surface procedure code, and you enter a second surface, axiUm lets you save this change.

**Solution**: Now in the above scenario, axiUm displays the message, “Cannot find the procedure with 2 surface(s) for the site entered.”

---

88501 - Strange display of bitewing fields

**Module**: EHR ~ Preventive Care Details window

**Problem**: Go to the Preventive Care Details window (in EHR module - Prev Care tab - right-click - Update Preventive Care Cycle option - Update Preventive Care window - OK button). Then go to the X-Ray Info section’s left (L) bitewing checkboxes.

If you select:

- The P checkbox
- The M checkbox

The EHR window’s Prev Care tab incorrectly displays:

- BW(LM)
- BW(LP)

**Solution**: Fixed. Now in the above scenario:

If you select:

- The P checkbox
- The M checkbox

The EHR window’s Prev Care tab correctly displays:

- BW(LP)
- BW(MP)
5.0 Bug Fixes

88506 - $0 treatments display error
Module: EHR - Chart Add tab
Problem: When a planned procedure is $0, axiUm displays a warning indicating that this procedure is not covered by the patient's primary insurance policy. axiUm should not display this message when a planned procedure is $0, even if the primary insurance does not cover this.
Solution: Fixed.

88546 - Hidden Approve button
Module: EHR - Attachments tab
Problem: This only occurs in the Dutch version of axiUm. In some cases, when you hover over the (Create a new Record) to display the tooltip, the Approve button covers the icon.
Solution: Fixed.

88559 - Incorrect error message
Module: EHR - Chart Add tab
Problem: If you select a tooth site using a procedure code for which axiUm cannot match the selected site, it displays a message. For example, if you select the procedure code D2331 (a 2-surface filling on an anterior tooth) and you select tooth #30 (a molar) and two surfaces (e.g., M, B), axiUm displays the message "Cannot find the procedure with 2 surface(s) One or more of the treatments will not be added!" This is the wrong message for this scenario.
Solution: Now in the above scenario, axiUm displays the message, "Cannot find the procedure with 2 surface(s) for the site entered."

88562 - Clearing hygiene code clears Date field
Module: EHR ~ Preventive Care Details window
Problem: Go to the Preventive Care Details window (in EHR module - Prev Care tab - right-click - Update Preventive Care Cycle option - Update Preventive Care window - OK button). In the Next Hygiene section, go to the Code drop-down field and select the blank option. axiUm clears the Date field and retains the value of some fields (they should all be blank).
Also, if you go to the Next Exam section and select the blank option in the Code drop-down field, axiUm clears the corresponding Date field.
Solution: Fixed so that when you clear the Code drop-down field, axiUm retains the corresponding Date field and resets all other fields to blank. At this point, if you click the OK button, axiUm deletes the hygiene recall (if it existed).

92853 - Office visit fees applied when they should not
Module: EHR - Chart Add tab
Problem: Sometimes, axiUm automatically creates office visit fees for patients with dual coverage, in which case office visit fees should not apply.
Solution: Fixed.

---

93010 - Incorrect future estimates
Module: EHR - Tx History tab

Problem: If a patient has insurance coverage on the date of a planned treatment, and you run an estimate using a future date (past the policy’s expiry date), axiUm calculates the treatment split as if the policy is still active on that future date.
Solution: Fixed. Now in the above scenario, axiUm calculates the treatment split based on whether the patient has insurance coverage on the date of their planned treatment.

---

96008 - Incorrect amount for in-process step treatments
Module: EHR - In Progress tab

Problem: If you complete one step within a set of step procedures (by selecting the Complete Treatments right-click option, not the double-clicking method), axiUm’s auto-checkout calculates the patient amount incorrectly. This may cause axiUm to initially charge the patient more, resulting in an overcharge (in the Transactions module) when you complete all other steps.
Solution: Now in the above scenario, axiUm charges the patient the correct in-process or completed amount according to the status (In Process or Completed) of each step within a set of step procedures.

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96561 - Missing toolbar icon
Module: EHR - Odontogram

Problem: The toolbar next to the odontogram is missing (Options/Settings).
Solution: The (Options/Settings) icon has returned to the toolbar next to the odontogram.

---

97174 - Not creating new recall records
Module: EHR - Preventive Care Details window

Problem: axiUm allows the entry of Preventive Care records containing no recall code. When you book the recall, this prevents axiUm from creating a record for the hygiene part of the Preventive Care cycle (no green recall record displays in the EHR window’s Tx History tab).
Solution: Fixed. Now axiUm requires all Preventive Care cycles to be entered using a recall code.
97190 - Adding note displays error message
Module: EHR ~ Tooth Notes/Conditions window
Problem: In the following scenario:

Setup:
1. Go to Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window - 🗂️ (Practice Options) - Practice Options window.
2. In the EHR Options section, select the following:
   - Use SOAP Notes: No
   - Use Template Notes: No

Then go to EHR module - odontogram - select tooth number - right-click - Tooth Notes/Conditions option - Tooth Notes/Conditions window - ☐️ (Add a new Note). axiUm displays an Object Windows Exception error message, "Create Fail for window Untitled,0,class CSelectNoteTypeDlg. Error: Invalid window handle".

Solution: Now in the above scenario, axiUm no longer displays this message.

97193 - SQL problem in Preventive Care duplicate recalls
Module: EHR - Preventive Care Details window
Problem: axiUm lets you create duplicate recalls.
Solution: Now creating a duplicate recall displays a warning message.

97270 - Blank dates in Preventive Care cycles
Module: EHR ~ Preventive Care
Problem: For patients where (in the odd case) their preventive care cycle is missing the hygiene part of the cycle:
   - When you advance the date to complete the hygiene cycle, axiUm does not carry over this completion date into the Preventive Care Details window that displays at the end of this advancing process.
   - When the completion date is blank (due to above), axiUm cannot calculate the date of the next preventive care cycle, and therefore the date of the next preventive care cycle is also blank.

Solution: Fixed.
97273 - Provider code not displaying in Preventive Care

**Module:** EHR ~ Preventive Care

**Problem:** When you create a hygiene recall (by going to the EHR module’s Prev Care tab and selecting the Patient Recalls right-click option), axiUm saves the record using an invalid provider type code, causing the associated Provider field in the Preventive Care Details window’s Next Hygiene section to display blank.

**Solution:** Fixed.

97274 - Comment field is blank

**Module:** EHR ~ Preventive Care Details window

**Problem:** axiUm does not save entries made in the Patient Recalls window’s Comment field when you complete a recall. This causes the Comment field in the Preventive Care Details window to also be blank.

**Solution:** Fixed.

97276 - Preventive Care auditing not working

**Module:** EHR ~ Preventive Care History window

**Problem:** In the Update Preventive Care window (in EHR module - Prev Care tab - right-click - Update Preventive Care Cycle option), select the Advance Preventive Care Dates option, select a checkbox (to indicate this item is completed), and enter a date and status. In the Preventive Care History window, axiUm does not display a record for this action.

**Solution:** Fixed.

97281 - Preventive Care dates show “complete” when not

**Module:** EHR ~ Preventive Care Dates window

**Problem:** axiUm displays a date in the Completed column, even for future dates. This is because axiUm is displaying the date associated to the booked recall rather than the date associated to the checked-in status code.

**Solution:** Fixed.

97353 - Adding automatic recall when it should not

**Module:** EHR - Chart Add tab

**Problem:** When you have a procedure associated to a recall, and you cancel the adding of this procedure, axiUm cancel it but adds the associated recall.

**Solution:** Fixed so that cancelling the addition of a procedure also cancels the addition of the associated recalls.
97440 - Need confirmation message

**Module**: EHR ~ Preventive Care Details window

**Problem**: If you delete a recall code (the Next Hygiene section’s Code drop-down field displays blank), and you click the OK button to save the changes, axiUm displays no confirmation. Because you are removing the entire recall cycle, not just a single recall procedure code, a confirmation message would be helpful.

**Solution**: Now in the above scenario, axiUm displays the message, "By clearing the Preventive Care code, this patient will no longer be in a Preventive Care cycle and the corresponding recall will be deleted. Are you sure you want to continue?"

---

97452 - Showing deleted and showing all active not working

**Module**: EHR ~ Preventive Care Dates window

**Problem**: There are two problems in the Preventive Care Dates window (in EHR module - Prev Care tab - Preventive Care Dates right-click option):

- axiUm displays all active recalls. Only Preventive Care recalls should be displayed in the list view.
- axiUm hides recalls containing blank status codes. These records should be displayed in the list view.

**Solution**: Fixed both problems.

---

97697 - SQL error

**Module**: EHR - Tx Plan tab - Detailed Plan

**Problem**: When you add multiple treatments and assign different sequence numbers within the same phase number (e.g., 1:1, 1:2, 1:3), and the Auto-reassign Sequences checkbox is selected, deleting one of these treatment records (e.g. 1:2) displays an SQL error.

**Solution**: Fixed.

---

97702 - Procedure codes become grouped by order number

**Module**: EHR - Tx Plan tab

**Problem**: This affects the Dutch version only. There is a need to address bad data in the historic database so that reports processed using this historic data will display estimate values correctly.

**Solution**: Fixed so that when running reports containing different procedure codes sharing the same order number, axiUm prints a separate line for each procedure code. Note that this fix is to support older data; newer data will not have this problem.
97962 - Prescription practice issues

**Module:** EHR ~ Patient Prescription Entry window

**Problem:** The Practice drop-down field displays the default practice inconsistently. This problem occurs if the Transactions module - 📊 (Options/Settings) - Transaction Options window - Miscellaneous section has the Workstation Practice Override deselected.

**Solution:** Fixed so that in the above scenario, the Practice drop-down field displays the provider’s default practice defined in Maintenance module - Office tab - Users icon - Users List window - run a search - 📏 (Edit Record) - Users window - Provider tab - Provider section, in the Practice Def. drop-down field.

98257 - Extra menu items

**Module:** EHR - Alerts tab

**Problem:** Sometimes selecting the Refresh Patient Summaries right-click option multiple times duplicates this item to the list of options.

**Solution:** Fixed.

98662 - Field not responding to Power Admin settings

**Module:** EHR - Chart Add tab

**Problem:** In the Power Admin module’s Chart Add Details window (in Dialog Boxes - EHR - Chart Add - Chart Add Details), when you make the Diagnosis field or ⋮ (ellipsis) red, axiUm makes these read-only in axiUm.

**Solution:** Fixed. Now in the above scenario, axiUm removes them from view.

99020 - Treatment consent form expiry

**Module:** EHR - Tx History tab

**Problem:** In the following scenario:

- Both provider and patient requires a treatment consent
- Provider has a chart lock on a consent
- A procedure code requires a consent

Then when this provider enters this procedure code for this patient, and also adds a patient consent (with an expiry date of today), axiUm displays 🔒 (requires consent icon) next to the treatment record.

**Solution:** Fixed so that in the above scenario axiUm does not display 🔒 (requires consent icon).
100686 - Problem with auto-checkout

**Module:** EHR - Tx History tab

**Problem:** When the following conditions are met:

- Your practice does not use auto-batch.
- You are a provider who requires no approval.

Then when axiUm automatically checks out a step within a set of step procedures (where the steps have different statuses), axiUm generates the same claim number for both the completed step and the auto-updated planned steps.

**Solution:** Now in the above scenario, axiUm adds the completed treatment to the Treatment tab and assigns a separate claim number.

---

101105 - Error message not displaying in Chart Add tab

**Module:** EHR - Chart Add tab

**Problem:** axiUm does not check for surface when you add a procedure code in the Chart Add tab.

For example, a one-surface procedure code has the following definition (in Maintenance module - Clinical tab - Procedure Codes icon - Procedure Code window - Graphic Detail section):

- Type drop-down field: Text
- Group field: blank

Then in the Chart Add tab you select this one-surface procedure code and enter two surfaces. axiUm does not display an error message.

Note that this occurs only in the Chart Add tab. Going to the Tx History tab, selecting the same one-surface procedure code, and entering two surfaces will correctly display the error message.

**Solution:** Now in the above scenario, axiUm displays the message, “Cannot find the procedure with 2 surface(s) for the site entered”.

---

101118 - Tx Plan tab not refreshing when changing patients

**Module:** EHR - Tx Plan tab

**Problem:** Sometimes when you select a patient from the Patient menu, axiUm does not use this patient in the current window. To refresh the window, you must close and re-open the EHR module.

**Solution:** Fixed.

---

101306 - Auto-switch not working properly

**Module:** EHR - Chart Add tab

**Problem:** axiUm does not use the auto-switch function properly when editing non-surface type procedures belonging to a group. For example, you have the following setup:
- Set D7110 to be Tooth, Anterior, Mixed, Extraction, 0 surf, Group D7110
- Set D7111 to be Tooth, Molar, Mixed, Extraction, 0 surf, Group D7110

Then in the Chart Add tab, you enter a D7110 on an anterior site 8. Then go to the Tx History tab and change this site from 8 to 1. axiUm displays a message indicating that this procedure can only be applied to an anterior tooth. The auto-switch did not change the procedure code from D7110 to D7111 (both belonging to the same group D7110, but each having a different tooth location.

Same problem occurs with extraction procedures belonging to a group.

This problem occurs not only in the Chart Add tab, but also in the Tx History tab’s treatment record edit windows (e.g. Edit In Process Treatment window).

**Solution:** Fixed so that auto-switch works properly.

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**101325 - Incorrect user in SOAP note audit history**

**Module:** EHR - Chart Add tab

**Problem:** When the currently logged on user (provider1) goes to Tools menu - Log On As User option and logs on as provider2, then adds a SOAP note (general or treatment-based), the note is stamped with provider1.

**Solution:** Now in the above scenario, the note is stamped with provider2.

---

**Evaluations**

**88547 - Evaluations not requiring credentials for 2nd instructor**

**Module:** Evaluations

**Problem:** If a grad student is also an instructor, and this person is required to complete a self-evaluation (containing two forms), the grad student/instructor can pose as the second instructor to approve it (by skipping the card-swipe process).

**Solution:** Fixed. Now axiUm will not let a grad student grade themselves, unless it is a self evaluation. After completing the self evaluation, axiUm disallows this user from becoming the approval instructor. The instructor selected from the Instructor window must be the one swiping to approve the evaluation.

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**88684 - Not displaying RVU**

**Module:** Evaluations - Evaluations tab

**Problem:** When you answer a question that is specific to a range (or all) treatments, and the question has a heading, axiUm does not display the RVU score for that treatment. These RVU values are defined in the Procedure Code window’s Clinical section’s RVU/CPV field (in
Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - run a search - highlight an item from list view -  (Edit Record).

Solution: Fixed.

98132 - Problems completing held evaluations

Module: Evaluations

Problem: When a provider completes the self evaluation portion of a sessional evaluation form, and indicate to hold the evaluation for an instructor to complete, the assigned instructor cannot open this evaluation.

Solution: Fixed. The instructor can now complete an evaluation that was held for them.

General

49613 - ESC key not closing window

Module: GUI

Problem: When you open a window containing a text box (e.g. Transactions window's Pmt Plan tab) and the cursor is in that text box (i.e. Comment text box), pressing the ESC key does not close the window.

Solution: Fixed in the following windows:
- Update Preventive Care Details window
- Patient Contact Notes window
- Station Options window
- ScratchPad window
- Form Item window
- Add to Wait List window

72017 - Start checks for procedures with steps

Module: Start check

Problem: If axiUm start-checked a child step, and this led to the parent step automatically given an In-Process status or a Completed status, axiUm still displays a start check warning for the parent step, and it should not do this.

Solution: Fixed.
81041 - HCFA changes for Kentucky Medicaid
Module: Claims
Problem: The following program is in effect for fields 24i and 24j of the HCFA form:

- 24i ID Qualifier: If the Practice record's State is Kentucky (KY) and is printing for the patient's primary Medicaid plan, (from Plan Type field in policy record) leave it blank; else if the Insurance Company's field, Print Treating Dr's Id checkbox is on, print the ID qualifier of the treating provider number; else blank.

- 24j Rendering Provider ID#: If the Practice record's State is Kentucky (KY) and is printing for the patient's primary Medicaid plan, (from Plan Type field in policy record) leave it blank; else if the Insurance Company's field, Print Treating Dr's Id checkbox is on, print the treating provider number & his/her NPI#; else blank.

Solution: The following fields have been changed to display:

- 24i: Insurance Company | Billing Numbers | Billing Number qualifier (should be set up as ZZ for Provider Taxonomy)

- 24j: 2 values are displayed here per line.
  - Insurance Company | Billing Numbers | Billing No. (value is defaulted to the provider's license number but can be updated to any value)
  - Provider's NPI number (if exists).

83539 - Problems changing password in Citrix
Module: Authentication
Problem: When a user authentication also requires a password change, the warning message, "A new password must be entered!" is hidden behind the User Authentication window. The user is unaware that a new password must be entered first before authenticating.

Solution: Fixed.

84891 - Error message in Citrix
Module: Network Messages
Problem: When you open axiUm in version 4.81.04 in a Citrix environment, it displays the error message, "Citrix environment variable is inconsistent."

Solution: Fixed.

85168 - Deleting practice records
Module: Database
Problem: axiUm lets you delete a practice record that is already in use (in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window).

Solution: Now when you try deleting a practice record that is currently in use, axiUm displays the message, "Code is in use. Cannot delete!"
85918 - Options icon cut off on the Stickies window
Module: Sticky Notes
Problem: When you set DPI scaling to 125% and screen resolution to 1280 x 1024, in the Stickies window, the icon is cut off.
Solution: Fixed.

86002 - Displaying missing charges in reports
Module: Crystal Reports
Problem: If a completed treatment was modified, approved, and then deleted, the report does not show missing charges.
Solution: Now if you delete a treatment record (those displayed in strikeout), and you run the report, axiUm shows the missing charges.

86769 - Sticky Note behavior in the Rolodex
Module: Sticky Notes
Problem: In the following scenario:
1. In the Rolodex module, search for a patient. Make sure the patient record contains a sticky note, and that the Edit Notes window’s Display on Screen section has the When select Patient checkbox selected.
2. Double-click on the patient’s name to move the patient’s name from the patient list to the selection list.
   axiUm displays the Edit Notes window. This is fine.
3. Close the Edit Notes window.
   axiUm does not move the patient to the selection list.
4. From the patient list, double-click on the patient’s name again.
   axiUm displays the Edit Notes window again, and you are stuck in a loop, and you cannot move the patient to the selection list.
Solution: Fixed. Now in the above scenario, closing the Edit Notes window the first time will move the patient to the selection list.

88027 - Patient picture not supporting *.psd files
Module: Support Issue
Problem: axiUm does not support *.psd (Adobe PhotoShop) file format for patient photos. If you try uploading a patient photo in *.psd file format, axiUm displays the message, “Problem loading the given image. Picture cannot be displayed.”
Solution: axiUm now supports *.psd files.

88169 - Mail merge problems

Module: Third Party Product

Problem: When you create a mail merge template, the axiUm MailMerge / Print icon displayed in the Word document is enabled, and clicking this icon causes problems in the process.

Steps to replicate:
1. Go to Info Manager - Patients tab - Patient List category.
2. Click the Search button.
   axiUm displays records in the list view.
3. Select multiple records (e.g. two).
4. Click the Letters button.
   axiUm displays the Select Letter Template window.
5. Click the New button.
   axiUm displays the Add Letter Template window.
6. Enter the fields and options.
7. Click the OK button.
   A blank Word document displays.
8. Insert some merge fields into the Word document.
9. Click on the axiUm MailMerge / Print icon.
   You do this because it seems like the next logical step in the process.
   Word closes and axiUm asks you for the number of copies to print.
10. Enter 1.
11. Click the OK button.
   axiUm prints the mail merge to the default printer.

Some strange behaviors occur, for example:

- axiUm prints one copy and continues asking for the number of copies to print for the remaining letters.
- The Word document closes, but continues running in the background of your computer. You can see this in the Windows Task Manager’s Processes tab. You must end the application from the Windows Task Manager before opening Word again.

Solution: The axiUm MailMerge / Print icon on the Word document is now disabled when creating a new template. The correct procedure is to create a template, save it in axiUm, then select the saved template to run the mail merge and the print process. When you follow this procedure, problems (like the two listed above) no longer occurs.
5.0 Bug Fixes

88355 - Printing insurance letter displays error message

**Module:** Crystal Reports

**Problem:** In the EHR module, when you try printing insurance letters, axiUm displays an error message.

Steps to reproduce:

1. In the Rolodex module, select a patient.
2. Go to the EHR module, click the Tx Plan tab, and then click the Patient Acceptance tab.
3. Click the Letters button.
   
   axiUm displays the Treatment Plan Letters window.

4. Select the Insurance Letter checkbox.
5. Click the OK button.
   
   axiUm displays an error message similar to the following:

   ![Error Message Image]

**Solution:** Fixed. Now in the above scenario axiUm no longer displays this error message.

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88556 - Overnight process takes too long

**Module:** Speed Issue

**Problem:** Need to improve speed of overnight processes.

**Solution:** Improved speed of overnight process.

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92769 - Full table scans on CLAIMEIT, CLAIMCAS

**Module:** Database

**Problem:** axiUm is doing a full table scan on CLAIMEIT, CLAIMCAS in the Explanation of Benefits window. This slows down the processing time.
**Solution:** axiUm no longer performs full table scans on the Explanation of Benefits window, speeding up the processing time.

---

**93029 - SQL script reverts patients to New Patient status incorrectly**

**Module:** Database

**Problem:** The overnight SQL script reverts the wrong patients to New Patient status. It is reverting patients who *do not* have a future New Patient appointment of status Planned or Active (this is fine), AND *have been seen in a set number of years* (this is incorrect).

**Solution:** Fixed to revert patients who *do not* have a future New Patient appointment of status Planned or Active, AND *have not* been seen in a set number of years.

---

**93051 - SQL script deletes recall records**

**Module:** Database

**Problem:** The overnight SQL script deletes all recall records.

**Solution:** Fixed.

---

**96205 - Hidden error messages**

**Module:** GUI

**Problem:** axiUm displays various error messages in the background, behind other windows.

**Solution:** Now these error messages are displayed in the foreground, in front of the window to which it relates.

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**96223 - Null provider middle names**

**Module:** Database

**Problem:** When you run a detailed production report, if more than one provider in the report has a null middle name in their provider record, these provider's treatments were displaying together in the report. The treatments should display under the individual provider.

**Solution:** Fixed.

---

**97441 - Active directory logon with no user access**

**Module:** Authentication

**Problem:** When you have two users (one active, one expired) with the same Active Directory credentials, and the expired user tries logging on, axiUm displays the message, "Attempting to access system outside of accessible hours!". Clicking the OK button displays the same window. After two attempts you are locked out.
5.0 Bug Fixes

Solution: Fixed so that in the above scenario, axiUm allows for unlimited attempts without locking you out.

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97603 - Change T3 IVR GetLocations function

Module: T3 IVR

Problem: When a patient calls the T3 IVR system to schedule an appointment, it was possible that the clinics detected by the system for the appointment provider were out-of-date. This caused the IVR booking to fail, requiring a transfer to a member assistant.

Solution: Only those clinics that the provider is scheduled to be working in will be detected.

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97869 - AddPatientEmployer procedure in POLINS_PKG package

Module: Database

Problem: The AddPatientEmployer procedure in the POLINS_PKG package receives a unique constraint Oracle error when adding an employer to a patient, where the patient was previously employed by that employer but that record was deleted. For example, an error will occur if there is already a PTEMPLOY record with Deleted=1 for the Patient, Employer.

Solution: Fixed. Now if there is a deleted patient employer (PTEMPLOY) record, the routine will detect it, and bring it back. If no record exists for the given patient and employer, the record will be inserted.

---

99327 - AddPolicyDependent procedure in POLINS_PKG package

Module: Database

Problem: If a guarantor with an insurance policy (patient1) has a dependent (patient2), and you delete this guarantor-dependent relationship in axiUm, in some cases the HL7 interface is unable to add back patient2 to patient1’s insurance. This generates a '-1, unique constraint (AXIUM.PTDEPEND_PRIMARY)' error in the Z_KP_HL7_PTPOL log table.

Solution: This case is now handled correctly; it no longer generates errors when HL7 messages are processed.

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99411 - POLINS_PKG.GetYEResetDate returning incorrect date

Module: Error message

Problem: If a policy's year-end occurred within the current calendar year, but before the current date, the GetYEResetDate function in the POLINS_PKG is returning the wrong date.

For example, if the policy's year-end is June 30, and the current date is July 4, 2011, the function returns July 1, 2011 (incorrect year). It should return July 1, 2012 (correct year).

Solution: Fixed to return the correct date.
100630 - MESSAGE_PKG displaying incorrect text

**Module:** Database

**Problem:** Due to an error in MESSAGE_PKG, when you assign a form to a group, the View 'Received' Message window’s To: field displays the group number instead of the group description.

**Solution:** Fixed to display the group description.

---

101187 - Hiding status bar

**Module:** Status bar

**Problem:** In the Desktop Settings window (in Maintenance - System tab - Desktop icon), if you select the Hide Status bar checkbox, axiUm still displays the status bar when you do the following:

- You go to Tools menu - Switch user to switch users
- You go to Tools menu - Log Off to log off axiUm and log back in.

**Solution:** Fixed so that logging off and back on will show/hide the status bar as indicated in the Desktop Settings window.

Note: If the logged on user requires a start check (in Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record) - Users window - Provider tab - Controls section, the Requires Start Check checkbox is selected), then axiUm always displays the status bar regardless of whether the Desktop Settings window’s Hide Desktop checkbox is selected or not.

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101309 - Oracle db credentials to be encrypted in .ini files

**Module:** .ini files

**Problem:** Would like Oracle database credentials encrypted in axiUmd.ini and axiUmdbc.ini.

**Solution:** After logging onto axiUm the first time, axium.ini values DBServer is now encrypted along with DBUser and DBPassword and an entry DBServerEncrypted=1 will be added to indicate this action.

For axiUmdbc.ini, the first time credentials are entered, they will be encrypted upon save. For existing setups, Open File | Database Connection and press OK. Now axiUmdbc.ini DBServer and DBUser values are encrypted as well as DBPassword value. An entry DB Converted=1 will be added to indicate this action.

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101386 - EHR crashes after logoff/logon

**Module:** Login

**Problem:** In the following scenario:

**Setup:**
1. Go to Maintenance module - System tab - Station Options icon.
2. Go to General - Office - Station Exit Method.
3. Select 1 = Log Off.

Usage;
1. Log onto axiUm.
2. Exit axiUm using (close).
3. Log back onto axiUm.
4. Open the EHR module.
   axiUm crashes

Solution: Fixed.

---

Information Manager

84066 - Sorting
Module: Info Manager - Appointment tab
Problem: When you create a pre-defined report using the Appointments category and use Appt.Type field to sort the report, and you also enter a count (Report Definition window - Selected section - highlight the Appointment Schedule.Apppt. Type - Operation button - Column Operation window - Count option), when you run the search again, axiUm displays inaccurate counts.
Solution: Fixed.

85165 - SQL error
Module: Info Manager - Patient Types ~ Option Conditions window
Problem: When you run a report in Patients tab - Patient List category - Patient Type checkbox, axiUm displays the Option Condition window. In the Operator drop-down field, select the Between operand and enter your values in the Value 1 drop-down field and the Value 2 drop-down field. When you click the OK button, axiUm displays the message, “Unknown SQL Error.”
Solution: Fixed.

85214 - Incorrect aging on patient balance report
Module: Info Manager - Billing tab
Problem: In some cases, the Patient Balances report in Billing tab - Patient Balances category shows a debit in one aging category and an offsetting credit in another aging category.
Solution: Fixed.
85311 - Tx Plan Detail Txs report

Module: Info Manager - Clinical tab

Problem: If you have no appointments for treatment plans, these treatment plans are omitted from the Tx Plan Detail Txs report (in Info Manager module - Clinical tab - Tx Plan Detail Txs category).

Solution: Now the treatment plans show in the report, even without appointments.

85514 - Daily Activity Report shows no data

Module: Info Manager ~ Daily Activity Report

Problem: When you run the Daily Activity Report (in Info Manager module - Practice tab - Daily Activity Report category), and from the Daily Activity Report window's Record Types list box you select Insurance Payments, axiUm displays no data in the Daily Activity Report.

Solution: Fixed.

86061 - Outstanding claims do not include adjustments

Module: Info Manager ~ Billing tab

Problem: Two problems:

- Run a report in Info Manager - Billing tab - Claims category. In the list view, right-click to display a list of options, and select the Edit Report option to display the Report Definition window. Select the Claims file - Claim Outstanding Bal field, and click the OK button to run the report. The Claim Outstanding Bal column is not displaying the correct amount.

- Also axiUm is not considering the patient related adjustment.

Solution: Fixed both problems.

87212 - Regular template labels not storing level

Module: Info Manager ~ Select Label Template window

Problem: There are two problems.

Problem #1: In the Select Label Template window, the Group column does not display data.

1. Go to the Info Manager module and click the Labels button.
   axiUm displays the Select Label Template window.

2. Select the Regular Template option.

3. In the Accessible by drop-down field, select the Level option.

4. Click the New button.
   axiUm displays the Report Editor window.

5. In the Description field, enter a title for this label.

6. In the Accessible by drop-down field, select the Level option.
This enables a second drop-down field.

7. In this second drop-down field, select the ALL option.

8. Click the Save button.
   
   axiUm saves the changes, closes the Report Editor window, and returns to the Select Label Template window.

In the Select Label Template window, the Group column does not display anything (should display ALL). When a specific level is selected, the Group column displays the specified level.

Problem #2: In the Labels window, newly created labels do not display.

1. Go to the Patient Card window and click 📄 (Print Patient Label).
   
   axiUm displays the Labels window.

2. Click the New button.
   
   axiUm displays the Report Editor window.

3. Edit the label.


5. Close the Labels window and re-open it.

The label record has disappeared from the Labels window.

Solution: Now in the above scenario, the Select Label Template window’s Group column displays ALL. The problem with labels disappearing from the Report Editor window is also fixed.

---

87875 - Patient Balance report’s AsAtDate are set incorrectly

Module: Info Manager ~ Billing tab

Problem: If you run the Patient Balances report using an As at Date in the past, axiUm uses the current date to determine the buckets used for allocation.

Solution: Fixed so that in the above scenario, axiUm includes the date indicated in the As at Date to calculate bucket balances.

---

93078 - Blank bookmarks in reports

Module: Info Manager - Practice tab

Problem: When you preview an A/R Reconciliation report -- where the secondary grouping is sorted by procedure -- the report’s bookmark displays no text:

1. Set up an A/R Reconciliation report.
   
   Go to Info Manager module - Practice tab - A/R Reconciliation category - A/R Reconciliation window.

2. Go to the Group by section’s 2: drop-down field and select the Tx Procedure option.
3. Click the Preview button. axiUm displays the report.
4. Go to the Preview tab and expand the bookmarks in the tree.
   The sub-headings contain no text. This should display the various procedures axiUm used to group this report.

**Solution:** Fixed.

---

**98329 - Insurance AR renamed**

**Module:** Info Manager - Practice tab

**Problem:** The Insurance A/R category is not an aged receivables report but an aged *balances* report. Need to change the category name.

**Solution:** The category Insurance A/R has been renamed to Insurance Aged Balances.

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**98548 - Production Report summary prints details**

**Module:** Info Manager - Practice tab

**Problem:** When you select the Production Report category and click the Print button, axiUm displays the Production Report window. In the Report Type section, selecting the Detailed option correctly prints the report details. However, selecting the Summary option incorrectly prints the report details (should print the summary).

**Solution:** Fixed so that if you select the Summary option, axiUm prints the summarized version of the Production Report.

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**Inventory**

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**85899 - Inventory issue**

**Module:** Inventory - Inventory window

**Problem:** The Inventory window’s Back-ord column does not display quantity of back-ordered items.

For example, in the following scenario:

1. Click the Order button to display the Inventory Order window.
2. In the Type drop-down field, select INT (Internal).
3. Create an order (e.g. order gloves from 2nd Floor Inventory to Main Warehouse location, quantity 8 boxes).
4. Click to add this item to the list view.
5. Close the Inventory Order window. Item is displayed in the Inventory window’s Pending Orders tab (in bold text).
6. Highlight this item.
7. Click the Fill button to display the Order Filling Selection window.
8. Click **Items selected in the Pending Orders tab** option.
9. Click OK to display the Order Filling window.
10. Highlight the item from the list view. This changes some of the fields you see on this window.
11. In the Quantity field, enter an amount less than you ordered, like 4 (out of the 8 boxes ordered).
12. Close this window. axiUm displays the Back-Order Question window.
13. Click Yes.

This closes the window and returns to the Inventory window. But there is no back-ordered amount in the list view’s **Back ordered** column.

**Solution:** Fixed. Now in the above scenario, the Inventory window’s **Back ord** column displays the back-order quantity.

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**Lab Tracking**

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**99788 - Missing tooltip, shortcut keys not working**

**Module:** Lab Tracking

**Problem:** Two problems:
- In the Lab Order EPR Forms window (in Lab Tracking module - run search - double-click on a record - Lab Order Details window - ![EPR Forms] - Add Form window - OK button), the ![EPR Forms] displays no tooltip.
- In the Lab Order Details window (in Lab Tracking module - run a search - double-click on a record), the shortcut keys for Preview (Alt-V) and Print (Alt-P) does not work.

**Solution:** The above problems now fixed:
- ![EPR Forms] displays the tooltip Print Form Report
- The shortcut keys for Preview (Alt-V) and Print (Alt-P) now works.

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**Maintenance**

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**80037 - $0 claims batched for printing / EDI submission**

**Module:** Maintenance ~ EDI Claims window

**Problem:** In Canada, claims with $0 totals are being submitted to EDI when auto-batched.
Solution: Now $0 claim totals are excluded. If you have a Canadian practice and submit a claim with a $0 total, axiUm displays an error message.

---

81693 - Selected practice not used for statements

Module: Maintenance ~ Practice Address window

Problem: In the Practices window, if you select a new practice, and then in the Practice Address window you click close or the Cancel button (instead of the OK button), axiUm displays the new practice on the application’s title bar, and appears that the selected practice is now active, however, axiUm still uses the previously selected practice for statements.

Solution: Now in the above scenario, axiUm uses the currently selected practice (displayed on the application’s title bar) for statements.

---

83121 - Renewing benefit plan may drop policies

Module: Maintenance ~ Benefit Plan List window

Problem: There is a possibility that the process for renewing benefit plans could potentially drop a subscriber's policy. This is because during the renewal process, axiUm does not copy the patient's future policy into the new benefit plan (and it has no end date).

Solution: The renewal process now carries forward all future patient policies on plans that are renewed, not just plans that overlap the renewal start date.

---

83123 - Renewing benefit plan creates incorrect limits/deducts for dependents

Module: Maintenance ~ Renew Benefit Plan window

Problem: If you change the Deduct field or the Limit field and click the OK button, axiUm displays the Adjust Limit and Deductible Balances window.

![Adjust Limit and Deductible Balances](image)

If you select the Adjust the balances by the amount used up option, axiUm incorrectly sets the new policy limit and deductible balances using the old policy.
Solution: Now the subscribers limit and deductible balances for the future policy are set with the values for the new renewed policy.

83175 - Description for Practice Override is incorrect
Module: Maintenance ~ Station Options window
Problem: When you go to the Station Options window (in Maintenance module - System tab - Station Options icon), then go to the Transactions section - Transaction section - Practice Override item, the Description text box displays, "Use the workstation practice override to default the facility for treatment billing."
Solution: Fixed to say, "Use the workstation practice override to default the practice for treatment billing."

83322 - Station options containing unnecessary text
Module: Maintenance ~ Station Options window
Problem: In Station Options window (in Maintenance module - System tab - Station Options icon), go to EHR section - Tx History Options section. When you select one of the Hide List Col __ items, the Description field displays, "Hide or show __". This description can be confusing.
Solution: Changed the Description field to display "Hide __" (deleted the text "or show").

83475 - Provider field too short
Module: Maintenance - Scheduler tab ~ Limited Appointment Codes
Problem: In the Limited Appointment Codes window (in Maintenance module - Scheduler tab - Limited Appt. Codes icon), the provider field is only nine characters long (should be 10). When a limited appointment code is added for a provider number that is 10 characters long, it does not display in the list or appear on the report although it has been added to the database.
Solution: Fixed.

83700 - Need check for making office charges inactive
Module: Maintenance ~ Office Charge Codes window
Problem: When making an office charge inactive in the Office Charge Codes window (in Maintenance module - Transactions tab - Office Charge Codes icon), axiUm does not check if the code is in use.
Solution: Fixed. Now when you try deactivating an office charge that is in use, axiUm displays an error message.
84416 - Can set fee guide on conditions & materials

**Module:** Maintenance ~ Procedure Code window

**Problem:** In the following scenario:

1. Go to the Procedure Code window (in Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - search for conditions or materials - highlight item - (Edit Record)).
2. Deselect either the **Condition?** checkbox or the **Is this a Material?** checkbox. The Fee Schedule button remains disabled.
3. Select the checkbox again.

The Fee Schedule button is now enabled and you can set a fee.

When editing a condition or material, the Fee schedule button should always be disabled.

**Solution:** Fixed.

---

84417 - Not calculating step child amounts when modifying

**Module:** Maintenance ~ Procedure Fee Schedule window

**Problem:** This occurs in the Procedure Fee Schedule window (in Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - run a search - (Edit Record) - Procedure Code window - Fee Schedule button), where the step parent code has the Individual Charge checkbox selected, and also contains step child procedures. When you change the value in the step child code’s Amount field and click (Modify Record), axiUm displays an error message.

**Solution:** Fixed so that if the step parent code has the Individual Charge checkbox selected, axiUm does not perform checks on changes made to a step child.

---

84640 - Results display ####

**Module:** Maintenance ~ Fee Schedule Processing window

**Problem:** Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Load Schedule tab. Load a schedule. axiUm displays the results in the Fee Schedule Processing window. Depending on the results, either the Rows Successfully Updated field or the Rows Rejected field displays ####.

![Fee Schedule Processing window](image)

**Solution:** Now in the above scenario, these fields display 0.
84673 - Diagnostic Categories window & Clinical Diagnosis List window

**Module:** Maintenance - Clinical tab ~ Diagnostic Categories window, Clinical Diagnosis List window

**Problem:** If you have not purchased the Tx Planning module and upgrade axiUm to 4.81, you cannot use the following windows:

- The Diagnostic Categories window (in Maintenance module - Clinical tab - Diagnostic Categories icon).
- The Clinical Diagnosis List window (in Maintenance module - Clinical tab - Clinical Diagnosis Codes icon).

**Solution:** Fixed.

84686 - Deleted users in the User Accessibility for Clinics

**Module:** Maintenance - Scheduler tab ~ User Accessibility for Clinics window

**Problem:** Deleted users are included in the search results in the User Accessibility for Clinics window (in Scheduler module - Scheduler tab - Clinics icon - Clinics window - highlight an item from the list view - ![User Access]).

**Solution:** Fixed. The User Accessibility for Clinics window now excludes deleted users in the search.

84742 - Station option mismatch

**Module:** Maintenance - Scheduler tab ~ Station Options window

**Problem:** The order of the following does not match:

In Scheduler module - ![Options/Settings] - Scheduler Options window - Wait List section, the 'Sooner if possible' add to Wait List drop-down field.

![Station Options Window](image)

Go to Maintenance module - System tab - Station Options icon - Station Options window. Select Scheduler - Schedule - SIP Mode.
**Solution:** Fixed. Now in the Station Options window, order of values 1 and 2 are reversed to match the order of the values in Scheduler Options window.

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### 84870 - Full payment reversal codes

**Module:** Maintenance ~ Adjustment Codes window

**Problem:** In the Adjustment Codes window (in Maintenance module - Transactions tab - Adjustment Codes icon), any adjustment code record with the Full Payment Reversal checkbox selected should be restricted to the following:

- Type: Debit
- Apply to: Payments

**Solution:** Fixed.

---

### 85034 - EHR Display Option field not saving

**Module:** Maintenance - EHR tab ~ EHR Display Options window

**Problem:** In the following setup:

1. Go to the EHR Display Options window, (in Maintenance - EHR tab - EHR Display Options icon).
2. From the list view, select a user level.
3. From the Default Chart Add Tab drop-down field, select Diagnosis.
4. Click (Modify Record).
5. Click away from the selected user level.
6. Click back on the original user level.

axiUm changes the Default Chart Add Tab drop-down field to the Codes option. axiUm changes the selection to the Codes option even if this user level did not have the Codes option to begin with.

**Solution:** Fixed. Now in the above scenario, axiUm retains the saved values.
85134 - Invalid Tooth Number error
Module: Maintenance - System tab
Problem: There is a false Invalid Tooth Number error in the PDA Referral Import Interface during the file import check that determines if a procedure can be applied to a site.
Solution: Fixed.

85530 - User forms error message
Module: Maintenance ~ Users List window
Problem: In the Users List window (in Maintenance module - Office tab - Users icon), if you click (User Forms) as a user with no access to forms, axiUm displays an incomplete error message, "There are no available forms to add for this."
Solution: Now axiUm displays the complete error message, "There are no available forms to add for this User."

85696 - Slight format mismatch for X12N 4010
Module: Maintenance ~ EDI Claims window
Problem: Three issues:
  • NY Medicaid 4.0 Claim: REF*D9 (claim#) should appear before REF*F8 (Void claim).
  • Dental 4.0 Claim: G3 is not printing. Both G3 and 4N should be included in the EDI file when applicable.
  • Segments DTP*096 (Hospitalization date), DTP*439 (accident date) and DTP*452 (Ortho placement date): These should not be included on Medicaid EDI submissions and should be removed.
Solution: Fixed all three problems.

85709 - Potential problem with Claim EOB information
Module: Maintenance ~ EDI Claims window
Problem: Three issues:
  • In SBR section, AMT lines should have qualifiers. First is *D. Second is *F2.
  • In SBR sections, AMT*F2 should be the sum of all Claimcas records (type=trx) for the claim.
  • In 2430 loop, all 3 segments should print (DVD, CAS, DTP).
Solution: Fixed all three problems.
85827 - Trojan import crashes axiUm

**Module**: Maintenance ~ Trojan Import Parameters window

**Problem**: When you are importing Trojan data using the Trojan Import Parameters window (in Maintenance module - Insurance tab - Trojan Utilities icon - Trojan Utilities window - Import Trojan button), the program crashes during the import process.

**Solution**: Fixed.

86087 - Medical claim rejection

**Module**: Maintenance ~ EDI Claims window

**Problem**: EDI claims were getting rejected when a dependant's SIN number was entered incorrectly (e.g., less than two characters long and not blank).

**Solution**: If this error condition is found, the policy holder’s subscriber number will print in the QC segment of the EDI file instead of the patient's SIN number.

86336 - No provider types in Appointment Code Access window

**Module**: Maintenance ~ Appointment Code Access window

**Problem**: If, in the Appointment Code window (in Maintenance module - Scheduler tab - Appt Codes icon), the Code field contains a space (e.g., SCREEN), and you click (Appointment Code Access) to display the Appointment Code Access window, no provider types are displayed in the list view.

**Solution**: Fixed. Now appointment codes with spaces in front of it will display all provider types in the Appointment Code Access window.

86610 - Strange behavior of the Quick List Definitions window

**Module**: Maintenance ~ Quick List Definitions window

**Problem**: In the Quick List Definitions window (in Maintenance module - EHR tab - EHR Display Options icon - EHR Display Options window - (Quick Lists) - Quick List Categories window - (Quick List Definitions)), activities such as adding, deleting, and moving items in the list view causes axiUm to display strange behaviors (e.g. moving items up/down skips lines).

**Solution**: Fixed.

86836 - Re-use of deleted periodontal jump keys

**Module**: Maintenance ~ Periodontal Conditions window

**Problem**: In the Periodontal Condition Values window (in Maintenance module - Perio tab - Perio Conditions icon - Perio Conditions window - Values button), if you define a jump key for a
condition and then the condition itself is deleted, defining the same jump key for a different condition displays an error message.

**Solution:** Fixed so that you can use the jump keys of deleted conditions (but not inactive conditions, as these may be re-activated later).

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**86849 - Rename OptDisplayColumn in Station Options window**

**Module:** Maintenance ~ Station Options window

**Problem:** In the Station Options window (in Maintenance module - Station Options icon), go to Patient / Rolodex section - Card section. The OptDisplayColumn option's name format is inconsistent with other similar options OptDisplay3rdColumn and OptDisplay5thColumn. Need to change this option's name from OptDisplayColumn to OptDisplay4thColumn.

**Solution:** Changed name from OptDisplayColumn to OptDisplay4thColumn.

---

**87171 - Need to increase limit on Current Value field**

**Module:** Maintenance ~ Station Options window

**Problem:** Go to the Station Options window (in Maintenance module - System tab - Stations icon - Station Codes window - 🔄 (Station Options)), then go to EHR section - Tx History Options section - DisplayDisciplines. The Current Value field is limited to 100 characters.

**Solution:** Now the limit on the Current Value field has been increased to 4,000 characters.
87238 - SQL error doing Vektis EDI

**Module**: Maintenance ~ EDI Claims window

**Problem**: If you re bill a treatment using the Policies Effective on Treatment Date and the policy changed after the treatment's original claim date, running an EDI batch using Vektis causes axiU m to display an error message.

**Solution**: Fixed so that in the above scenario axiUm no longer displays an error message.

---

88138 - Incorrect error message when deleting recall code

**Module**: Maintenance ~ Recall Codes window

**Problem**: If you try deleting a recall code that is already in use, axiU m displays the error message, “Cannot mark as Inactive....” This message is incorrect, since you are trying to delete it.

**Solution**: Fixed to display the message, “Cannot delete”.

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88286 - Adjustment code’s access levels not listed alphabetically

**Module**: Maintenance ~ Adjustment Access window

**Problem**: In the Adjustment Access window (in Maintenance module - Transactions tab - Adjustment Codes icon - Adjustment Codes window - highlight item from list view - ☰ (Level Access)), the Level column in the list view is not listed alphabetically.

**Solution**: The Adjustment Access window’s list view’s Level column is now listed alphabetically.

---

88392 - Maximum records to display counts deleted records

**Module**: Maintenance - Patient tab

**Problem**: This occurs in the following windows:

- Employers List window
  In Maintenance module - Patient tab - Employer Codes icon.

- Referrals List window
  In Maintenance module - Patient tab - Referrals List icon.
For example, go to Station Options window (in Maintenance module - System tab - Station Options icon), go to the General section - ListWindow section - MaxRecords, and enter 10 in the Default field. Then when you run a search in the Employers List window (with the Show Deleted checkbox deselected), axiUm should display the first 10 active records. However, if 6 of those first 10 records are deleted records, axiUm displays only 4 active records.

Solution: Now in the above scenario, axiUm displays 10 active records at a time.

---

**88450 - Workstation auto-logout settings**

Module: Maintenance ~ Desktop Settings window

Problem: In the Desktop Settings window (in Maintenance module - System tab - Desktop icon), if you deselected the Auto Exit Work Station Override checkbox, axiUm clears and disables the Auto Exit (in mins.) field. This is fine. However, if you open the Desktop Settings window and the Auto Exit Work Station Override checkbox is already deselected, the minutes field is enabled (it should be disabled).

Solution: Now when you open the window and the Auto Exit Work Station Override checkbox deselected, the Auto Exit (in min.) field is disabled.

---

**88507 - Custom columns are blank**

Module: Maintenance ~ Book’s Provider Selection window

Problem:
When you set up axiUm to display additional user information columns:

- In Maintenance module - Office tab - Users icon - Users List window - (User List Options) - User List Options window

axiUm displays nothing in these columns when you open the Book’s Provider Selection window

- In Maintenance module - Scheduler tab - Books icon - Books window - select a book by provider - (Book Definitions) - Book Definitions window - (Book’s Provider Selection))

Solution: Fixed. Now in the above scenario, when you open the Book’s Provider Selection window, axiUm displays the contents of any additional user columns displayed.

---

**96692 - Typo on field name**

Module: Maintenance ~ Trojan Type window

Problem: In the Trojan Type window (in Maintenance module - Insurance tab - Trojan Utilities icon - Trojan Utilities window - Trojan Codes button), the field Short Desp should be renamed.

Solution: The field name “Short Desp” has been renamed to “Short Description”.

---
96808 - Inactive provider error message

**Module:** Maintenance ~ Provider Working Schedules window

**Problem:** If you have entered an inactive provider ID in the Provider field, axiUm displays the message, "Provider %s is inactive, cannot proceed!" This is fine; however, it makes more sense to display the provider ID.

**Solution:** Changed error message to include the provider ID.

96812 - Order of ortho appointment codes

**Module:** Maintenance ~ Practice Options window

**Problem:** When you go to the Practice Options window (in Maintenance module - Office tab - Practice Address icon - Practices window - (Practice Options), then go to the Ortho Settings section, the Ortho Appointment Code drop-down field does not display the options in numerical/alphabetical order.

**Solution:** Fixed. Now the Ortho Appointment Code drop-down field’s options are displayed in numerical/alphabetical order.

96856 - Disabled icon

**Module:** Maintenance ~ Trojan Flag window

**Problem:** Go to the Trojan Flag window (in Maintenance module - Insurance tab - Trojan Utilities icon - Trojan Utilities window - Trojan Codes button - Trojan Type window - (Trojan Flags)). The (Modify Record) is always disabled.

**Solution:** The icon is now enabled. Clicking this icon saves any changes made to the record in the Trojan Flag window.

97345 - EDI claims sent with the wrong Billing NPI & Name

**Module:** Maintenance ~ EDI Claims window

**Problem:** This occurs when you create an EDI file containing multiple claims for the same billing doctor. If the billing doctor had completed claims in multiple practices, axiUm incorrectly submits the claims together under the NPI number of the practice indicated on the first claim. This problem occurs only if the billing doctor is set up to print the practice name (not their own name) on the claim.

**Solution:** Now when multiple practices are included in an EDI file for the same billing doctor, axiUm correctly sorts the claims and bills them under the correct practice NPI.

97389 - “All Payor” EDI claims not using EDI code 06126

**Module:** Maintenance ~ EDI Claims window
Problem: When the Insurance Company window’s EDI section has the EDI Claims drop-down field displaying the All Payor option, axiUrn disables the EDI Code field. However, Emdeon does not process claims as All Payor unless this EDI Code field displays 06126. Need axiUrn to hard-code the X12N format’s EDI Code field to display 06126, similar to the current behavior with the NEIC format.

Solution: Fixed.

97434 - Problem with EDI submission to secondary insurance
Module: Maintenance ~ EDI Claims window
Problem: For EDI Claims, SVD segment was formatted the fields in the wrong order.
Solution: Fixed.

97531 - Drop-down field enabled when it shouldn’t
Module: Maintenance ~ Users window
Problem: When you select a user who is a provider, and in the Provider tab you deselect the User is a treating provider checkbox, the 2nd Provider Sched For drop-down field remains enabled. This should be disabled.
Solution: Fixed.

97613 - Referral shows on claims with no referral entered
Module: Maintenance - System tab ~ EDI Claims window
Problem: When you auto-batch claims, axiUrn displays referral information on patient claims where no referral information was entered, causing claims to print and submit with a referral unassociated to the patient and claim. For example, you add a treatment to patient1 in the Transactions module - Treatment tab, and using the Medical button you add a referral, and then you create a different treatment for patient2 (note that treatment number of patient2 must be higher than patient1) and enter no referral information. Then in the EDI Claims window you auto-batch all unsubmitted claims, and then you go to Print Held Claims window to print patient2. The referral information from patient1 is displayed for patient2.
Solution: Fixed.
97776 - Deleted template note’s reference codes are unusable

Module: Maintenance ~ Clinical Note Code window

Problem: In the Clinical Note Code window (in Maintenance module - EHR tab - Clinical Note Codes icon - Clinical Note Codes List window - (Create a new Record)), if you create a new template note, then immediately delete it, and then create another one using the same value in the Reference Code field, axiUm displays the following window:

Solution: Now in the above scenario, you can reuse the reference code.

Note: You can only do this if the template note was added and then immediately deleted before it was used in axiUm.

98031 - Provider Access to Appt Codes dialog - Modify button

Module: Maintenance - Scheduler tab ~ Provider Access to Appointment Code window

Problem: Go to the Provider Access to Appointment Code window (in Maintenance module - Scheduler tab - Appt Codes icon - Appointment Code window - (Appointment Code Access) - Appointment Code Access window - Providers button). If you highlight a record in the Providers with Access list view and use the arrow buttons to change the time values, the Modify button remains disabled and you cannot save the changes. Entering the time value directly in the fields does enable the Modify button.

Solution: The Modified button is now enabled when you use the arrow keys to change the time values.

98058 - Checkbox entry not being saved

Module: Maintenance ~ Appointment Code window

Problem: In the Appointment Code window (in Maintenance module - Scheduler tab - Appt. Codes icon), if you leave the Second Provider drop-down field blank, and you select the Is Required checkbox, axiUm does not save the Is Required checkbox selection.

Solution: Fixed so that axiUm saves the Is Required checkbox selection, even if the Second Provider drop-down field is blank.
**98414 - Duplicate DTP segment when CLAIMEOB exists without CLAIMCAS**

**Module:** Maintenance ~ EDI Claims window  

**Problem:** When submitting an EDI claim to a patient's third insurance company and treatment EOB details have been entered for insurance1 but not insurance2, the second SVD segment was missing.  

**Solution:** Fixed.

---

**99376 - Error message wording**

**Module:** Maintenance ~ Copy Provider Work Schedule Day window  

**Problem:** In the Copy Provider Work Schedule Day window (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - Details button - Provider Schedule Detail window - (Copy Schedule Details icon)), when one of the following occurs:

- The date being copied to has no available chairs.  
- The date being copied to does not have enough available chairs as are required by the date being copied from.

axiUm displays the message, "Cannot copy work schedule as there are no available chairs". This message does not accurately describe both scenarios.  

**Solution:** The message has been re-worded to, "Cannot copy work schedule as there are not enough available chairs". This now accurately describes both scenarios.

---

**99740 - Search on EDI Claims window not working**

**Module:** Maintenance ~ EDI Claims window  

**Problem:** When you run a search in the Submitted Claims tab, axiUm does not return the search properly if billing IDs contain less than 10 characters.  

**Solution:** Fixed.

---

**99924 - Provider Working Schedules report sort order**

**Module:** Maintenance ~ Provider Work Schedule report  

**Problem:** The Provider Working Schedules report (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - (Preview Report)) sorts the records incorrectly when two schedules have the same start date.  

**Solution:** Fixed.

---

**100234 - Incorrect setting of year-end dates**

**Module:** Maintenance ~ Benefit Plans window
Problem: When you change the Yr End date fields for a benefit plan using one of the following methods:

- In Maintenance module - Insurance tab - Benefit Plans icon - Benefit Plan List window - run a search - select a record - (Edit/View Benefit Plans) - Edit Benefit Plan window.
- In Patient Card window - Patient Info window - Insurance tab.

axiUm does not correctly update the year-end dates for patient policies on those benefit plans. This could cause the monthly and yearly resetting of limits and deductibles to occur on an incorrect date for some patients on the benefit plan.

Solution: Fixed so that when the Yr End date field for a benefit plan is changed, the year-end dates of all patient policies on the benefit plan are also updated.

100561 - Change station option descriptions

Module: Maintenance ~ Station Options window

Problem: In the Station Options window (in Maintenance module - System tab - Station Options icon), select Treatment Planning - Tx Plan Printer. The three items in this section need the Description fields changed to make more sense.

Solution: Fixed. Now in the following station option items, the Description field has been changed:

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Old Description</th>
<th>New Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DriverName</td>
<td>Default printer driver for treatments.</td>
<td>Default printer driver for treatment plans.</td>
</tr>
<tr>
<td>PortName</td>
<td>Default printer port for treatments.</td>
<td>Default printer port for treatment plans.</td>
</tr>
<tr>
<td>PrinterName</td>
<td>Default printer for treatments.</td>
<td>Default printer for treatment plans.</td>
</tr>
</tbody>
</table>

100649 - Incorrect audit records

Module: Maintenance ~ Clinical Note Template window

Problem: Sometimes, when you update user information in the following areas, axiUm collects incorrect audit data:

- Power Admin module
- axiUm - Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record)

Solution: Fixed.

100751 - Clinical note templates allow past maximum characters

Module: Maintenance ~ Clinical Note Template window
**Problem:** In the Clinical Note Template window (in Maintenance module - EHR tab - Clinical Note Codes icon - Clinical Note Codes List window - select Template Notes option - (Create a new Record)), when you enter a tag that causes the entire note to exceed the maximum 4,000 characters, axiUm does not display an error message (but the note still cuts off at 4,000 characters).

**Solution:** axiUm now displays an error message when the note exceeds 4,000 characters.

---

**100893 - Deleting office charge codes**

**Module:** Maintenance ~ Office Charge Codes window

**Problem:** If you delete an office charge code (in Maintenance module - Transactions tab - Office Charge Codes icon - Office Charge Codes window), and this office charge code is used nowhere else but in a missed appointment code (in Maintenance module - Scheduler tab - Missed Appointment Codes icon - Missed Appointment Codes window), axiUm lets you delete the office charge code.

**Solution:** Fixed so that in the above scenario, you cannot delete the office charge code, even if the missed appointment code has never been used.

---

**101098 - Station options containing unnecessary characters**

**Module:** Maintenance ~ Station Options window

**Problem:** In the Station Options window (in Maintenance module - System tab - Station Options icon), go to the EHR section - Tx History Options section. The following items contain extra characters in the Value field:

- Ortho Hide List Col201 - 204: \n
- Notes by module: [control character]

- History Status [control character]

**Solution:** Removed the unnecessary characters from the above items.

---

**101129 - Problem with EDI submission to secondary insurance**

**Module:** Maintenance ~ EDI Claims window

**Problem:** For EDI Claims, SVD segment was formatted the fields in the wrong order.

**Solution:** Fixed.

---

**101142 - Instructor working schedule issue**

**Module:** Maintenance ~ EDI Claims window

**Problem:** If an instructor working schedule contains an exception, and you try to “unstamp” the reserved chair, axiUm notifies you that the chair is reserved for somebody else (but is not).

**Solution:** Fixed so that clicking the chair will stamp/unstamp the instructor.
Ortho Manager

85594 - Show/hide columns not working properly

Module: Ortho Manager ~ Tx History Options window

Problem: In the Tx History Options window, column headings do not show or hide as specified in the Tx History Options window.

Scenario:

1. Go to the Tx History Options window (in Ortho Manager module - Ortho Treatment History) - Ortho Tx History window - Options/Settings).
2. Go to the Hide Columns section.
3. Select all column names in the list box. This indicates that you want to hide all columns in the Ortho Tx History window.
4. Click OK. axiUm hides all columns in the Ortho Tx History window.
   Note: axiUm always displays the Code column and the Description column, this fine.
5. Go back to the Tx History Options window, and in the Hide Columns list box, deselect a column name displayed after the one called Diagnosis (anything after Diagnosis are custom columns created in Maintenance module - Ortho tab - Ortho Custom Fields icon - Ortho Custom Fields window). By deselecting a column name, you are indicating that you want to show this column heading in the Ortho Tx History window.
6. Click OK.

In the Ortho Tx History window, the deselected column heading does not show, and instead, the column name below the one you selected is displayed.

Solution: Fixed. Now in the above scenario, the column heading you select to hide is now hidden from the Ortho Tx History window.

86155 - Window freezes after selecting template note

Module: Ortho ~ Add Ortho Visit / Ortho Treatment window.

Problem: In the Add Ortho Visit / Ortho Treatment window, if it contains a custom code field that is left blank, and you add a template note, axiUm freezes the window.

Scenario:

1. From the Rolodex module, select a patient.
2. Open the Add Ortho Visit / Ortho Treatment window (in Ortho module - Ortho Treatment History) - Ortho Treatment History window - Create a new Record),
3. Make sure it contains a required custom field, and that it is left blank.
4. Go to the Ortho Notes section, and from the Type drop-down field, select the Template Note options.

5. In the Code field, click ⋯ (ellipsis) to display the Clinical Note Codes List window.

6. Double-click an item from the list view to select it.
axiUm closes the Clinical Note Codes List window, returns to the Add Ortho Visit / Ortho Treatment window, and displays an error message appears indicating that the required custom field cannot be blank.

7. Click OK.
The message disappears, but now the Add Ortho Visit / Ortho Treatment window is frozen. You must press the Esc key to regain control because everything is disabled.

Solution: Fixed. Now in the above scenario, the Add Ortho Visit / Ortho Treatment window no longer freezes.

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86259 - Adding second ortho visit not retaining Code field

Module: Ortho Manager ~ Add Ortho Visit / Ortho Treatment window

Problem: In the Add Ortho Visit / Ortho Treatment window (in Maintenance module - 📋 (Ortho Tx History) - Ortho Tx History window - 📄 (Create a new Record)), when you select the Is an ortho visit checkbox and enter the fields, and then click the Add button, axiUm saves the ortho visit record and keeps the Add Ortho Visit / Ortho Treatment window open. This is fine. However, the disabled Code field is now blank. Because this field is disabled and you cannot select another procedure code, entering another ortho visit displays the error message, "Invalid procedure code entered".

Solution: Fixed so that in the above scenario, axiUm retains the value in the Code field.

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86260 - Adding second ortho visit not retaining custom fields

Module: Ortho Manager ~ Add Ortho Visit / Ortho Treatment window

Problem: In the Add Ortho Visit / Ortho Treatment window (in Maintenance module - 📋 (Ortho Tx History) - Ortho Tx History window - 📄 (Create a new Record)), when you select the Is an ortho visit checkbox and enter the fields, and then click the Add button, axiUm saves the ortho visit record and keeps the Add Ortho Visit / Ortho Treatment window open. This is fine. However, axiUm deletes the values you entered in the custom fields.

Solution: Fixed so that in the above scenario, axiUm retains the values you entered in the custom fields for the first ortho visit.

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86884 - Deleting unapproved General Notes

Module: Ortho Manager ~ Ortho Tx History window

Problem: In the Ortho Tx History window (in Ortho Manager module - 📋 (Ortho Treatment History)), when you add a template note or a general note that requires approval, the indicator
turns blue (signifying that it requires approval), this is fine. But when you delete this unapproved note, the indicator remains displayed. There is no need to approve a note that has been deleted. Deleting an unapproved SOAP note behaves fine.

**Solution:** Fixed.

### 97971 - Template note not saving response to last item

**Module:** Ortho Manager ~ Add Ortho Visit / Ortho Treatment window

**Problem:** When you add a new template note as part of an ortho visit, axiUm does not save the answer to the last question.

1. Go to the Add Ortho Visit / Ortho Treatment window (in Ortho module - 💌 (Ortho Treatment History) - Ortho Tx History window 📑 (Create a new Record)).
2. Go to the Ortho Notes section, and from the Type drop-down field, select the Template Note option.
3. In the Code field, click ⋼ (ellipsis) to display the Clinical Note Codes List window.
4. From the list view, select a template note. axiUm displays the Template Note (Ortho Visit) window displaying the details of the template note.
5. Answer all the questions, using the Next button to move to the next question.
6. Click the OK button to close the Template Note (Ortho Visit) window and return to the Add Ortho Visit / Ortho Treatment window.
7. Click on the Edit Note button to display the Template Note (Ortho Visit) window showing the answers you just entered.
   - The last answer is empty.

**Workaround:** If, after entering an answer to the last question, you press the Enter key or click on the Prev button, axiUm saves this. The problem only occurs with the OK button.

**Solution:** Clicking the OK button now saves the answer to the last question.

### Patient Attachments

### 83679 - Message for viewing final letters

**Module:** Patient Attachments ~ Letters section

**Problem:** When you double-click on a final letter for viewing (not editing), axiUm displays the message "Cannot edit Final Letters”. If you are editing the final letter, this message makes sense. But if you are viewing the final letter, this message is misleading.

**Solution:** Now in the above scenario, axiUm assumes you are double-clicking to edit it, and displays the message, "Cannot edit a Final Letter. Please use the preview button to view the contents.” You can then click 📜 (Preview Report) to view it.
85276 - Attaching files using Windows7 or Vista causes crash

**Module:** Patient Attachments

**Problem:** If your workstation is running Windows 7 or Windows Vista, and you try attaching a file, axiUm crashes.

**Solution:** Fixed.

87228 - EPR Forms access

**Module:** Patient Attachments

**Problem:** When using EPR Forms, axiUm uses the Power Admin module's EPR Form settings (in Menu Items section - Main Program section - EPR Forms checkbox). When this checkbox is deselected, axiUm denies you access to EPR forms in the Patient Attachments module even if you have axiUm set up to have access in the following areas:

- Maintenance module - EHR tab - Attachment Sections icon - Attachment Sections window - (Attachment Sub-tabs) - Attachment Sub-tabs window - (Level Access) - Attachment Access window.

- Maintenance module - EHR tab - EPR Form Setup - EPR Form Setup window - (Form Definition) - Form Pages window - (Level Access) - Form Page Access window.

**Solution:** Removed the Power Admin setting described above. Access to forms in the Patient Attachment module now relies only on the two axiUm setups listed above.

99212 - Date validation not performed

**Module:** Patient Attachments

**Problem:** When you open the Add Patient Consent window, then select a consent code and enter an invalid date, clicking the OK button saves the invalid date (skips the date validation process).

Note: After entering an invalid date, if you move to a different field, axiUm validates the date entered.

**Solution:** Fixed so that in the above scenario, axiUm runs the date validation.

100283 - Read-only users can change EPR form details

**Module:** Patient Attachments

**Problem:** In an attachment-type tab, if a user with read-only access selects the Edit Date/Description right-click option, axiUm displays an error message, this is fine. However, if the same user does the same thing in an EPR-type tab, axiUm allows you to make changes to the Date field and the Description field, and displays no error messages.

**Solution:** Fixed so that EPR-type tabs obeys the user rights set up in axiUm.
Patient Card

29498 - Custom Fields displays default plus selected

**Module:** Patient Card ~ Patient Info window

**Problem:** Go to the Patient Info window - Codes tab - Custom Fields section. Go to a custom drop-down field and select an option (not the first one). Then click on the same drop-down field to display the options again. axiUm highlights two items; the first in the list and the one already displayed in the drop-down field. This only happens the first time you make a selection. Subsequent selections behave fine.

**Solution:** Fixed with the following behavior:
- If the drop-down field is blank, and you display the drop-down list, axiUm highlights nothing in the drop-down field.
- If the drop-down field displays an option, and you display the drop-down list, axiUm highlights only the item already displayed in the drop-down field.

86435 - Missing popup in the Patient Card window

**Module:** Patient Card

**Problem:** When you hold the mouse over the Patient Card window's Chart static field, axiUm no longer displays details in a popup window as it did before.

**Solution:** Fixed. The popup window can be displayed again.

87414 - Unnecessary error message

**Module:** Patient Card

**Problem:** When you delete a single-subscriber insurance policy from a patient's record (in the Patient Info window - Insurance tab - Details section, the **Can have multiple subscribers** checkbox is deselected), axiUm displays the Delete Benefit Plan Question window.

![Delete Benefit Plan Question](image)

This window is redundant, because if you click the No button, the benefit plan is a single-subscriber plan and cannot be used.

**Solution:** Fixed to no longer display the Delete Benefit Plan Question window.
88231 - Default custom codes not displaying

**Module:** Patient Card ~ Patient Info - Add Patient window

**Problem:** When you add a new patient record by going to Rolodex module - (Add Patient) - Patient Info - Add Patient window, and you click the Codes tab, axiUm does not display any default custom codes you set up (in Maintenance - Basic tab - Custom Codes icon). This problem occurs in the first five custom fields (Patient1 - Patient5). The remainder of the custom fields (Patient6 - Patient10) works fine, axiUm displays any default custom codes you set up for them.

**Solution:** Fixed. Note that if you do not assign a default custom code for a custom field, that custom field will be blank when you open the Patient Info - Add Patient window.

88346 - Lost Patient Card fields

**Module:** Patient Card

**Problem:** The “in dispute” indicators (the red asterisk *) no longer displays in the Patient Card window’s aged accounts receivables summary section.

**Solution:** Now this indicator displays again.

96727 - Patient Employers report not displaying “other location”

**Module:** Patient Card ~ Patient Employers report

**Problem:** In the Patient Employers report (in Patient Info window - Employer tab - (Preview Report) or (Print Report)), axiUm does not display the information entered in the Other Loc field of the Patient Info window’s Personal tab’s Telephone section.

**Solution:** Now the Patient Employers report displays the value entered in the Other Loc field.

97404 - Duplicate shortcut key

**Module:** Patient Info window - Guarantor tab

**Problem:** The shortcut key Alt+M is used for both (Modify Record) and the Same as Pt button.

**Solution:** The shortcut key for (Modify Record) remains the same (Alt+M). The shortcut key for the Same as Pt button is now Alt+E.

97511 - Area Code field allows non-numeric values

**Module:** Patient Info window - Personal tab

**Problem:** In the Telephone section’s Home# fields, the field reserved for entering the area code accepts non-numeric characters.
Solution: This field now only accepts numeric characters to be consistent with other area code fields in axiUm.

97782 - Patient photo not displaying

Module: Patient Card

Problem: When you upload a patient photo (by going to Patient Info window - Clinical tab - Picture section), axiUm does not display the uploaded photo anywhere in axiUm (e.g. Transactions window’s General tab), but occasionally displays it in the Rolodex window.

Solution: Fixed. Now uploaded patient photos are displayed in all areas of axiUm reserved to display this.

98762 - Primary Providers Warning when Preventive Care disabled

Module: Patient Card ~ Assign Providers window

Problem: If you are not using Preventive Care, and you add a new recall in the Patient Recalls window, axiUm still displays the Primary Providers Warning window.

Setup:
1. Open the System Options window (in Maintenance module - System tab - System Options icon).
2. Go to the Scheduling section and deselect Use Preventive Care checkbox.
3. Click the OK button.

To replicate this bug:
1. Open the Rolodex window.
2. Go to the patient selection list, right-click to display a list of options, and select the Patient Recalls option to display the Patient Recalls window.
3. Add a recall record.
This warning is part of the Preventive Care. axiUm should not display this.

**Solution:** Fixed. Now in the above scenario, axiUm no longer displays this warning.

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### 101188 - Problems converting guarantors to patients

**Module:** Patient Card

**Problem:** If you have not set up a default patient status (in Maintenance module - Basic tab - Status Codes icon - Status Codes window, with the Type drop-down field displaying Patient and the Default checkbox selected), and you convert a guarantor to a patient, axiUm blanks out the Status drop-down field (in Patient Info window - Personal tab - Personal section). This field should never be blank.

**Solution:** Now when converting a guarantor to a patient:

- If you have set up a default patient status, axiUm displays this in the Status drop-down field.
- If you did not set up a default patient status, axiUm transfers the value from the Guarantor tab's Status drop-down field into this Status drop-down field.

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### Personal Planner

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### 92555 - Speed issue with Assigned Forms tab

**Module:** Personal Planner ~ Assigned Forms tab

**Problem:** The Assigned Forms tab is slow to load data.

**Solution:** Fixed by improving speed.

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### Rolodex

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### 66166 - Default cursor location

**Module:** Patient Info window ~ Approve Note window, Approve SOAP Note window, Approve Template Note window

**Problem:** When approving notes, we need axiUm to default the location of the cursor to the associated note window's Approve button. Currently the cursor defaults to the first character space in the note's text entry area.

**Solution:** Now axiUm defaults the cursor to the Approve button when notes are ready to be approved in the Approve Note window, Approve SOAP Note window, and Approve Template Note window.
84550 - The New button doesn't allow creation of new template

**Module:** Rolodex ~ Select Patient Label window

**Problem:** When you go to the Select Patient Label window (in Rolodex module - Patient Card window - (Print Patient Labels) - Labels window - Word Template button - Select Patient Label window, clicking the New button displays the Select Printer window for printing, and you are unable to continue creating a new label.

**Solution:** Fixed. Now clicking the New button displays the Add Label window for creating a new label. After creating a new label, you can use the Word application's print feature to print. If you have not set up a printer in axiUm (in Info Manager module - Setup button), axiUm asks you to do so before you continue creating the label.

84835 - Incorrect wording on message

**Module:** Rolodex

**Problem:** The following messages are displayed when a user tries to access a patient whose chart they have no access to:

- "This user is locked from making Chart requests."
  This displays when the user has the Charts Locked from User checkbox selected in the Users window's Additional tab's Charts section (in Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record)). Then the user clicks on a patient in the Rolodex. This message is confusing because the user is only selecting a patient record and not making a chart request.

- "This appointment provider is locked from making Chart requests."
  This displays when axiUm submits an automatic chart request in the Scheduler module. This message is confusing because neither user nor the appointment provider is making a chart request; at this point you are just booking the appointment.

**Solution:** Changed the above messages to, respectively:

- "This user is locked from accessing charts."

- "This appointment provider is locked from accessing charts."

85173 - Phone number display on Patient Card window

**Module:** Rolodex ~ Patient Card window

**Problem:** If you are using a screen resolution of 1280 x 1024, and increase DPI scaling to 125% (in Windows - Control Panel - Fonts), the Patient Card window's phone number box expands, but the phone number field itself does not, causing the phone number in the field to cut off.

**Solution:** Fixed. Note that the Patient Card must be maximized to display entire phone number.

85203 - Guarantor patient status not defaulting

**Module:** Rolodex ~ Patient Options window
Problem: In the following scenario:

1. Open the Patient Options window (in Rolodex module - Patient Card window - (Options/Settings)).
2. Go to the Patient Entry section, and in the Guarantor Patient Status drop-down field, select an option.
3. Click the OK button.
4. Open the Patient Info window.
5. Go to the Guarantor tab, click (Clear Data), and enter the fields.

In the Personal section, the Status drop-down field does not default to option selected in the Patient Options window.

Solution: Fixed.

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85875 - Patient Open Date is defaulting blank for new patients

Module: Rolodex ~ Patient Info window

Problem: When adding a new patient, the Open Date field in the Patient Info window - Personal tab - Status section defaults to blank. It should default to today's date.

Solution: Fixed.

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86341 - Clinic sessions not showing

Module: Rolodex ~ Appointment Request window

Problem: In the Appointment Request window (in Rolodex module - patient selection list - right-click - Appt Request option), when you select a clinic, and then open the Date drop-down calendar and immediately close it (this selects today's date), the Session drop-down field does not display options associated to the selected clinic.

Solution: Fixed.

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88542 - Selecting chart lock patients

Module: Rolodex

Problem: In the patient list, right-clicking a patient record containing a chart lock freezes axiUm.

Solution: Fixed.
92855 - Problem with auto check-out & auto-batching

Module: Rolodex ~ Patient Approvals window

Problem: If a user is setup to use Auto Check Out and they add a planned treatment for an insurance carrier (for which the treatment will be auto-batched), axiUm is re-batching the completed treatment having the same treatment # rather than batching the new planned treatment. This can result in completed treatments that have already been submitted to insurance showing up as unprinted/unsubmitted again in Print Held Claims (and possibly EDI Claims). This problem will only occur if a claim record exists for the completed treatment with the same treatment # as the planned treatment being auto checked out / auto-batched.

Solution: Fixed.

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96498 - Double-clicking displays double warnings

Module: Rolodex

Problem: In the following scenario:

Setup:

1. Go to the Rolodex module - 📘 (Options/Settings) to display the Patient Options window.
2. In the Rolodex section, deselect the Patient must be in the selected list to be accessed checkbox.
3. Click the OK button.
4. In the Rolodex window, search for a patient record that:
   - has a sticky note or chart lock warning (not a chart lock error)
   - is already displayed in the selection list

Then in the Rolodex search list, double-click on this patient record. axiUm displays the chart lock warning or the sticky note twice.

Note: If the patient record contains a chart lock error, it correctly displays only once.

Solution: Fixed to only display the warning/sticky once.

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96588 - Double-clicking in patient list not highlighting in selection list

Module: Rolodex

Problem: In the following scenario:

Setup:

1. Go to the Rolodex module - 📘 (Options/Settings) to display the Patient Options window.
2. In the Rolodex section, deselect the **Patient must be in the selected list to be accessed** checkbox.

3. Click the **OK** button.

Then in the Rolodex window’s search list, double-click a patient name that is already displayed in the selection list. axiUm does not highlight that patient name in the selection list.

**Solution:** Fixed.

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**96787 - Repeating error message**

**Module:** Rolodex

**Problem:** In the following scenario:

2. Close axiUm.
3. Rename or remove the Ifpsd14.dll file (a program file required to load the photo file format).
4. Open axiUm.
5. Open the Rolodex module and select the same patient
   axiUm displays the message, "Problem loading the given image. Picture cannot be displayed!"
6. Click the OK button.
   axiUm displays this message again.

**Solution:** Fixed so that in the above scenario, the message displays only once.

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**Scheduler**

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**80554 - Has Planned Appointment indicator not working correctly**

**Module:** Scheduler - Active tab

**Problem:** axiUm displays the Has Planned Appointment indicator for rescheduled, pending, or planned appointments, but not for appointment requests. When a patient has an appointment request, the currently booked appointment does not display the Has Planned Appointment indicator.

**Solution:** Now shows the Has Planned Appointment indicator for appointment requests.
### 83678 - Button text needs fixing

**Module:** Scheduler ~ Patient Appointments  
**Problem:** In the Patient Appointments window and the Family Appointments window (in Scheduler module - Rolodex - Rolodex (Select Patient) window - double-click a patient), need to change the text on the Sch. /w Expert button to Sch. w/ Expert.  
**Solution:** Fixed.

### 84360 - Appointment Report displays mis-drawn column headers

**Module:** Scheduler ~ Appointment Report  
**Problem:** In the following scenario:  
1. Go to the Appointment Report window (in Scheduler module - (Print View)).  
2. In the Report Times section, enter a time range in the Start field and End field that is long enough to create a page break in the report.  
3. Click OK.  
   In the Appointment Report, columns containing appointments on the first page causes mis-drawn headers on the following page.  
**Solution:** Fixed.

### 84456 - Appointment Expert window creating small gaps

**Module:** Scheduler ~ Appointment Expert window  
**Problem:** axiUm is creating small gaps in the provider schedule by honoring the minimum gap time when it should not when the provider is working in multiple chairs.  
**Solution:** Fixed.

### 84524 - Appointment Expert not searching provider's reserved chairs

**Module:** Scheduler ~ Appointment Expert window  
**Problem:** In the following setup:  
- You are using book mode (in Scheduler module - (Options/Settings) - Scheduler Options window - Scheduler Type section, the Book option is selected).  
- You select to search for a provider who has reserved chairs (in the Appointment Expert window, the Search on Reserved Chairs option is selected).  
When you click the Search button in the Appointment Expert window, axiUm shows nothing in the search results.  
**Solution:** Fixed.
84670 - Access to Expert options inconsistent

**Module:** Scheduler ~ Appointment Expert window

**Problem:** Access to the options in the Appointment Expert window may be enabled or disabled depending on how you access this window. For example:

- From the Scheduler module, right-click on a yellow “floating” appointment to display a list of options, then select the Appointment Expert Option to display the Appointment Expert window. The Search on Reserved Chairs option and the Search on Available Chair options are enabled. This is fine.

- From the Scheduler module, click (Rolodex) to display the Rolodex (Select Patient) window. Double-click a patient name to display the Patient Appointments window or Family Appointments window. Then click the Sch. w/Expert button to display the Appointment Expert window. The Search on Reserved Chairs option and the Search on Available Chair options are disabled. They should be enabled.

**Solution:** Fixed. Now when you access the Appointment Expert window using the second method above, and you are searching for a single appointment opening, the two options are available for you to select. If you are searching for multiple appointment openings, these options are disabled.

84730 - Searching in available chairs mode

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In the following scenario:

Setup:

2. Highlight an item from the list view.
3. Select the **Book has reservations** checkbox.

Then do the following:

1. In the Scheduler, click (Expert) to display the Appointment Expert window.
2. Select the Search on Available Chairs option.
3. Select the Based on Appt Book checkbox.
4. Select the Use Book's Open Hours option.
5. Click the Search button.

axiUm displays no search results.
84744 - Reassigning appointments

Module: Scheduler ~ Reassign Appointments window

Problem: Go to the Reassign Appointments window (in Scheduler module - Active tab - right-click column heading - Reassign Appointments option), enter the fields, and click the OK button. aXiUm asks if you’d like to delete the reserves. If you click on either the Yes button or the No button, aXiUm displays the error message, "The selected appointments will not fit into the new provider's reserve. Cannot proceed."

Solution: Fixed. Now in the above scenario, this message no longer displays and the appointments are properly reassigned.

84823 - SQL error

Module: Scheduler ~ Appointment Expert window

Problem: Sometimes if you leave the Provider field blank, and in the Code drop-down field you select a hygiene recall type appointment code, aXiUm displays an SQL error.

Solution: Fixed.

84825 - Printing Appointment Report causes database warning

Module: Scheduler

Problem: In the following scenario:

1. Go to the Scheduler Options window (in Scheduler module - (Options/Settings)), go to the Scheduler Type section, and select the Book option.
2. In the Books window (in Maintenance module - Scheduler tab - Books icon), do the following:
   - **Book has reservations** checkbox: selected
   - **Only display for book's open times** checkbox: selected
   - **Book for selected**: Chairs
   - **Columns ordered by**: Provider Code
3. Go to the Scheduler module.
4. Click (Print View) to display the Appointment Report window.
5. Click the OK button to display the Select Printer window.
6. Select a printer and click the Select button.

aXiUm displays a Database Warning window.
Solution: Fixed. Now in the above scenario, axiUm no longer displays a Database Warning window.

84868 - Database warning
Module: Scheduler ~ Appointment Expert window
Problem: In the Appointment Expert, receiving frequent Oracle database warnings due to reaching maximum number of Open Cursors. This was due to cursors being left open in this area of the application.
Solution: Fixed.

84892 - Change sort order of Appointment List window
Module: Scheduler ~ Appointments List window
Problem: When viewing the Appointments List window in family mode, axiUm sorts the list by the Type column. This causes the Rescheduled and Pending appointments to appear in the middle of the list (between Active and Cancelled), and Planned appointments at the end. Need a more logical sort order.
Solution: Fixed. New sort order is Active, Checked In, Checked Out, Failed, Cancelled, Deleted, Requested, Ortho, Planned, Pending, Rescheduled, Recall.

84991 - Cannot delete appointment requests
Module: Scheduler ~ Patient Appointments window, Family Appointments window
Problem: In the following scenario:
1. Got to the Patient Appointments window or the Family Appointment window (in Scheduler module - Rolodex - Rolodex (Select Patient) window - select a patient).
2. From the list view, select an appointment request.
3. Click the Delete button. axiUm asks if you want to delete the appointment.
4. Click the OK button.
The appointment request is still there.
Solution: Fixed. Now in the above scenario, deleted requests are displayed in the Type column as Request (Del).
Also you can no longer edit or schedule deleted requests.

85133 - Text color refresh issue
Module: Scheduler - Active tab
Problem: In the following scenario:
1. There is a checked-in or confirmed appointment (appointment1).
2. You create a new appointment or reschedule an existing appointment (appointment2), and book this after appointment1, in the same column.

3. You create a new appointment or reschedule an existing appointment (appointment3), and book this before appointment1, in the same column.

The first appointment no longer appears to be checked-in or confirmed (text color changes back to normal).

Solution: Fixed.

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85139 - Adding non-clinic time when appointments exist

Module: Scheduler ~ Provider Non-Clinic Times window

Problem: In the following scenario:

1. Go to the Scheduler module’s Active tab. Make sure it displays appointments for today.

2. Go to the Provider Non-Clinic Times window (in Scheduler module - (Non-Clinic Times)).

3. Create a non-clinic time for today that overlaps an appointment.

4. Click (Add a new Record).

   axiUm displays the message, "Appointment(s) found on the given date. Do you want to unschedule them?"

5. Click the No button.

axiUm retains the appointment, but the provider is now marked as away from the clinic during that time.

Solution: Fixed. Now in the above scenario, axiUm retains the booked appointments and rejects the non-clinic time you just defined.

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85178 - Searching in Appointment Expert with blank Provider field

Module: Scheduler ~ Appointment Expert window

Problem: If you leave the Provider field blank when searching for a hygiene type appointment, axiUm displays the message, "The selected provider does not match the type required by the appointment code". Need the ability to search for hygiene type appointments without entering a provider.

Solution: Now you can leave the Provider field blank when searching for a hygiene type appointment (Code drop-down field display hygiene type code).

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85181 - Appointments window left maximized

Module: Scheduler ~ Patient Appointments window, Family Appointments window

Problem: When you create an appointment in the Patient Appointments window or the Family Appointments window (by clicking the Make New button and entering an appointment in the New Appointment window), axiUm leaves this patient/family appointment window maximized, hiding
the yellow “floating” appointment behind itself where it is not visible. Need a way to reveal it so that you know it is ready for you to schedule it.

Solution: Fixed. Now in the above scenario, axiUm closes the Family Appointments window so you can see the yellow “floating” appointment on the Scheduler window’s Active tab.

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**85295 - Incorrect error message**

**Module:** Scheduler ~ Reassign Appointments window

**Problem:** In the following scenario:

1. In the Reassign Appointments window, re-assign an appointment from a chair that does not use reserves to a chair that uses reserves. axiUm displays the Add New Reserve Warning.
2. Click Yes. axiUm displays the message, “Would you like to delete the reserve(s) from the originating chair?”
3. Click Yes. axiUm displays the message, “An appointment or reserve was changed in the middle of reassigning. The process has been aborted.”

Solution: Fixed.

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**85322 - Cancel option available on failed & cancelled appointments**

**Module:** Scheduler ~ Appointment Lists window

**Problem:** In the Appointment Lists window (in Scheduler module - (Lists)) if you go to the Appointments tab and run a search, the Cancel right-click option is always available for appointments types that cannot be cancelled (e.g. Cancelled type appointments display the Cancel option but selecting it does not cancel it; Failed type appointments display the Cancel option and selecting it lets you cancel the appointment that never happened).

Solution: Fixed.

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**85609 - Problems when cancelling/failing appointments**

**Module:** Scheduler ~ Patient Appointments window, Family Appointments window

**Problem:** When you right-click an appointment in the book and select the Cancel option or the Failed option, axiUm displays the Reschedule Now Question window:

Selecting the Change to Planned button or the Move to Pending button does not retain a record of the cancelled or failed appointment.
Solution: Fixed. Now axiUm keeps a record of cancelled and failed appointments.

86075 - Yellow “floating” appointment hidden

Module: Scheduler ~ Appointment Expert window

Problem: In the following scenario:

1. Open axiUm using extended desktop (Maximize axiUm)
2. Go to Scheduler --> Appointment Expert
3. Select the Search on Available Chairs option.
4. In the Clinic drop-down field, select the All Clinics option.
5. In the Patient field, select a patient.
6. In the Code drop-down field, select an appointment code.
7. Click the Search button to run the search.
8. From the list view, highlight an item.
9. Click the Make Appts button.

The yellow “floating” appointment is not displayed, it is hidden someplace off-screen. You must close and reopen the Scheduler module to see it.

Solution: Fixed.

86233 - Cannot add subsequent sticky note to appointments

Module: Scheduler - Active tab

Problem: If you are a user in Chair mode, and in the Active tab you add an appointment, then you add a sticky note to the appointment, it works. But if you click on a different tab and click back to the Active tab, and try to add another sticky note to the same appointment, it will not stick.

Also, if you close the Scheduler window and re-open it, you cannot add a sticky note to an existing appointment. If you first edit the existing appointment, then you can add another sticky note.

Solution: Fixed. Now you can add subsequent sticky notes.

86254 - Yellow “floating” appointments disappears

Module: Scheduler ~ Appointment Expert window

Problem:

In the following scenario:

1. Deselect the ‘Make Appts’ button will schedule automatically at time selected checkbox in the Appointment Expert Options window’s Appointments section (in Scheduler module - (Expert) - Appointment Expert window - Options button).
2. In the Appointment List window (in Scheduler module - (Lists)), search for appointment type Requested.

3. From the list view, right-click the item and select the Schedule with Expert option. axiUm displays the Appointment Expert window.

4. Click the Search button to run the search.

5. From the list view, highlight an item and select the Make Appts button. axiUm displays the yellow “floating” appointment.

6. Close the Scheduler and re-open it.

The yellow “floating” appointment disappears.

Solution: Fixed.

---

86276 - Appointment Expert offer chairs instructors not working in

Module: Scheduler ~ Appointment Expert window

Problem: When searching on available chairs for an instructor, axiUm offers chairs that the instructor is not stamped with (in the instructor's work schedule setup).

Solution: Fixed. Now axiUm only searches for chairs stamped with the instructor.

---

86361 - Appointment Expert window search is slow

Module: Scheduler ~ Appointment Expert window

Problem: When searching appointment blocks to fill appointment requests on available chairs using the instructors work schedules, the search is very slow.

Solution: Fixed.

---

86365 - Expert Available Chairs and Preview

Module: Scheduler ~ Appointment Expert window

Problem: When you search for appointment openings on available chairs (the Search on Available Chairs option is selected in the Appointment Expert window) and you click the Preview button, axiUm displays the Appointment Expert window in preview mode. The Provider column is blank because there is no provider. Need axiUm to show the chair name (like in the Appointment Expert window’s regular mode).

Solution: Fixed.

---

86382 - Appointment Expert search does not consider discipline

Module: Scheduler ~ Appointment Expert window

Problem: Appointment Expert performs discipline searches based on the provider’s ideal day preferences, but does not always consider their preferred discipline, returning incorrect results.
Setup:

1. From the Appointment Expert window, click the Options button to display the Appointment Expert Options window.

2. From the **Discipline Search based on** section, select the Provider Schedule Ideal Day Preferences option.

3. Click the Rules button to display the Appointment Scheduling Rules (Expert Setting) window.

4. Select the following checkboxes:
   - Enforced Preferred Discipline checkbox
   - Restricted 'Not to do' Discipline checkbox
   - Restricted Preferred Appointment Codes checkbox

5. Click the OK button to close the Appointment Schedule Rules (Expert Settings) window and return to the Appointment Expert Options window.

6. Click the Accept button to save the changes made earlier to the Appointment Expert Options window.


8. Select the following checkboxes:
- Enforced Preferred Discipline checkbox
- Restricted 'Not to do' Discipline
- Restricted Preferred Appointment Codes

![Appointment Scheduling Rules (System Settings)](image)

9. Click the OK button.

10. Go to Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - Details button - provider Schedule Detail window - Provider Working Schedules window (Ideal Day Setup) - Provider Ideal Day Settings window.

11. Go to the Preferences section, and do the following:
   - From the Discipline drop-down field, select a preferred discipline for the provider (e.g. ENDO).
   - Select the Enforced checkbox.

![Preferences](image)

12. Click 📝 (Add a new Record).

13. Go to Maintenance module - Scheduler tab - Clinic Layout icon - Clinic Layout window.

14. Add chairs to the clinic, making sure that the chairs are associated to the discipline (i.e. ENDO).

Steps to reproduce:

1. Go to the Scheduler module - 🗂️ (Expert) - Appointment Expert window.
2. Select the Search on Reserved Chairs option.
3. In the Provider field, select the provider for whom you set up your discipline preferences in the setup above.
4. From the Discipline drop-down field, select the discipline indicated in the setup above (i.e. ENDO).
5. From the Code drop-down field, select an appointment code.
6. Click on the Search button. The search result considers the selected discipline.
7. From the Discipline drop-down field, select a different discipline (e.g. PEDO).
8. Click on the Search button.

axiUm no longer considers the selected discipline.

**Solution:** Fixed. Now in the above scenario, axiUm considers the selected discipline.

---

**86395 - Appointment Expert problem searching session / daily layout**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In the Appointment Expert Options window’s Instructor Search based on section (in Scheduler - (Expert) - Appointment Expert window - Options button), if you select the Session or Daily Layout setup option, and you run a search on available chairs (the Search on Available Chairs option is selected in the Appointment Expert window), axiUm returns duplicate and incorrect search results.

**Solution:** Fixed.

---

**86528 - Appointment Expert not displaying discipline**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** If a chart’s location codes do not contain active days, the Appointment Expert window’s search results prevent the discipline from displaying.

**Setup:**

1. In the Location Codes window (in Maintenance module - Office tab - Location icon), select a location code with all **Active Days (for Chart Req.)** checkboxes deselected.
2. Follow all setup instructions in 86382.

Steps to reproduce:
Follow all the steps in 86382. The search result does not display the selected discipline in the Discipline column.

Solution: Fixed.

---

86618 - Tooltip not displaying

Module: Scheduler ~ Discipline Group Layout window

Problem: In the Discipline/Group Layout window (in Scheduler module - Chair tab - right-click - Session Layouts option), hovering over the does not display tooltip.

Solution: Hovering over now displays the tooltip Session Layout.

---

86693 - Booking appointment where there is no reserve

Module: Scheduler ~ Appointment Expert window

Problem: If you search for an appointment opening using the Appointment Expert window, axiUm lets you book an appointment where there is no reserve.

Setup:

2. Select the *Make Appts* button will schedule automatically at time selected checkbox.
3. Click the Accept button.

To replicate this bug:

1. Go to Scheduler module - (Expert) - Appointment Expert window.
2. Select the Search on Available Chairs option.
3. Click the Search button.
4. Select the Search on Reserved Chairs option (but do not search this time).
5. From the list view, highlight an item and click the Make Appts button.

axiUm books the selection as an active appointment without a reserve.

Solution: Now when you switch search modes between the Search on Available Chairs option and the Search on Reserved Chairs option, axiUm clears the search results from the list.
86835, 87229 - Start time display

**Module:** Scheduler - Active tab

**Problem:** If you open the Scheduler module on a book’s open day (e.g. the book is open on Mondays, Wednesdays and Fridays, and today is a Monday), the book displays the start time set up for this book. This is fine. If you open the Scheduler module on a book’s closed day (e.g. Tuesday), the books starts at 9:00am (hard-coded in axiUm). This is also fine. However, if you then advance to the next open day (e.g. Wednesday), axiUm retains and displays the hard-coded start time rather than the book’s open time. axiUm should always display the open time defined for this book.

**Solution:** Fixed.

86927 - Appointment Expert (preview mode) loses focus

**Module:** Scheduler - Active tab, Weekly tab

**Problem:** The Appointment Expert window (in preview mode) loses focus -- meaning it is no longer the active window -- when you press the up/down keys on your keyboard. Using the up/down icons in the window work fine.

The workaround is to use the up/down icons on the window. However, the gray highlight used in this method does not show clearly on some monitors. The blue highlight used when pressing the up/down keys are much easier to see.

**Solution:** Fixed.

86961 - Tooltip causes crash

**Module:** Scheduler - Active tab, Weekly tab

**Problem:** When you hover over an empty appointment time block, axiUm displays a tooltip containing the clinic name and chair name, then axiUm crashes.

**Solution:** Fixed so that axiUm no longer crashes in the above scenario.

87269 - Reassigning appointments from Chair tab

**Module:** Scheduler - Chair tab

**Problem:** If you select a chair, reassign the appointments to a provider/chair in a different clinic, and view the Appointment History window for this appointment (in Scheduler module - right-click appointment - Show History option), axiUm displays the appointment’s original clinic, not the appointment’s reassigned clinic.

Similar problem to 87935.

**Solution:** Fixed so that when appointments are reassigned, axiUm updates associated fields in other windows.
87295 - Insufficient notice problem

**Module:** Scheduler - Active tab

**Problem:** When you book an appointment in Chair mode, axiUms displays a message indicating that the appointment is insufficient notice, despite the following correct setup:

In Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record) - Users window - Additional tab - Scheduling section:

- **Minimum Notice __ before appt** field set to 24.
- **Schedule __ and View __ days in the future** field set to 60 and 60.
- **Scheduler** drop-down field is set to Chair option.

In Maintenance module - Scheduler tab - Clinics icon - Clinics window - (Sessions) - Sessions window, the Active Days checkboxes are selected for Monday - Friday.

In Maintenance module - Office tab - Location icon - Location Codes window, the Active Days (for Chart Req.) checkboxes are selected for Monday - Friday.

**Solution:** Fixed. Now in the above scenario, axiUms no longer displays a message.

87335 - Recall w/exam not displaying 2nd provider

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you search for an open appointment block for a recall with exam, axiUms displays open time blocks when both providers are available. However, when you book the appointment and open the Edit Appointment window's 2nd Provider field is blank.

**Solution:** Fixed.

87437 - Allow overlap & double-booking with 2nd provider

**Module:** Scheduler ~ Appointment Expert Options window

**Problem:** In the following setup:

- In the Appointment Expert Options window's Include Overlaps section, you select the Based on Provider's 'Double Book Warning' Flag option.

- In the Appointment Expert window, the 2nd Provider Field displays a provider. This provider has no double-book warning (meaning, in Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record) - Users window - Personal tab - Scheduler section, the Double Book Warning drop-down field displays the No Warning option).
When you run a search in the Appointment Expert window, and the first provider is not allowed double-booking, axiUm does not allow double-booking for the 2nd provider either.

**Solution:** Now in the above scenario, axiUm allows double-booking of the second provider.

---

**87653 - New Patient Exam appointments not honoring break times**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** The new patient exam is not honoring break times for hygienists. This works when booking directly into the Scheduler module’s Active tab, but searching for available time blocks in the Appointment Expert window offers times during the hygienist’s break time.

**Solution:** Fixed to honor hygienists’ break times when searching for new patient exam type appointment blocks using the Appointment Expert window.

---

**87757 - Family Appointments window displays “inactive” patients**

**Module:** Scheduler ~ Family Appointments window

**Problem:** A patient appears in the Family Appointments list even though their associated patient type is not searchable in the Rolodex module.

**Solution:** The patient’s name no longer appears in the Family Appointments window for patient types that are not searchable in the Rolodex. axiUm will still display their names in the Patient Appointments window.
**87866 - Appointment discipline display behavior**

**Module:** Scheduler ~ New Appointment window, Edit Appointment window, New Planned Appointment window, Edit Planned Appointment window, New Appointment Request window, Appointment Request window

**Problem:** In any of the above windows, if you select an appointment code, axiUm displays the associated discipline. This is fine. However, if you select a subsequent appointment code (one with no associated discipline), axiUm displays the discipline from the previously selected appointment code; the discipline should be blank.

**Solution:** Fixed. Now if you select a subsequent appointment code (one with no associated discipline), axiUm displays no discipline.

You can still manually select a discipline (or a different discipline than the one shown). Manually selecting a discipline will always display this discipline, even if you select a different appointment code.

Note: The Appointment Expert window and the Additional Appointment Info window behave differently. When you manually select or change the discipline in these windows, selecting a different appointment code will clear the manually selected one and display the associated one.

---

**87935 - Reassigning appointments from Active tab**

**Module:** Scheduler - Active tab

**Problem:** If you select a booked appointment, reassign it to a provider/chair in a different clinic, and view the Appointment History window for this appointment (in Scheduler module - right-click appointment - Show History option), axiUm displays the appointment's original clinic, not the appointment's reassigned clinic.

Similar problem to 87269.

**Solution:** Fixed so that when appointments are reassigned, axiUm updates associated fields in other windows.

---

**88025 - Only List Matching Discipline checkbox not working**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When the Only List Matching Disciplines checkbox is selected, axiUm still offers time with other disciplines that are not enforced.

**Solution:** Fixed.

---

**88121 - Books without reserves cannot be filled from wait list**

**Module:** Scheduler - Active tab

**Problem:** If you are using a book that does not have reserves (in the Books window, the Book has reservations checkbox is deselected), highlighting an appointment block and selecting the Fill from Wait List right-click option displays an error message.

**Solution:** Fixed so that in the above scenario, axiUm no longer display an error message.
88150 - Appointment Expert offers instructor non-clinic times (1)

**Module:** Scheduler ~ Appointment Expert window

**Problem:** axiUm is not considering instructor non-clinic time defined in the *session layout.*

Note: This is different from 88385, where axiUm was not considering instructor non-clinic time defined in the *instructor’s work schedules.*

When you search for instructor availability, axiUm does not take the instructor's partial-day, non-clinic time into consideration, offering all time blocks in the instructor's day.

**Setup to reproduce:**

1. Make sure you set up the instructor’s non-clinic time:
   - In Maintenance module - Instructor Schedules icon - Instructor Working Schedules window - (Times Off) - Instructor Times Off window, create a partial-day non-clinic time (e.g. this Friday, 12:00pm - 5:00pm).
2. Make sure you stamp the instructor’s name on a chair:
   - In Scheduler module - Chair tab - Daily Layout right-click option - Daily Layout window, stamp the instructor’s name on a chair (e.g., Chair1).
3. Make sure you clear all of the Appointment Expert window's search rules:
   - In Scheduler module - (Expert) - Appointment Expert window - Options button - Appointment Expert Options - Rules button - Appointment Scheduling Rules, clear all checkboxes to minimize interference with pre-existing provider’s or instructor’s rules.

**Steps to reproduce:**

1. Open the Appointment Expert window and enter the following:
   - Provider: Select the provider in the same chair as instructor (i.e., Chair1).
   - Instructor: Select the instructor you set up (in setup step #2).
   - Code: any appointment code that both the provider and the instructor can use.
   - Date Range: Select the day the instructor has a partial-day, non-clinic time (i.e., this Friday).
2. Click the Search button.
   - axiUm display search results for time blocks during the instructor’s partial-day, non-clinic times (i.e., Friday afternoons).

**Solution:** Now in the above scenario, axiUm obeys instructor’s partial-day, non-clinic times.

---

88305 - Not updating changes made between searching & booking

**Module:** Scheduler ~ Appointment Expert window

**Problem:** axiUm does not update changes made in axiUm between the time you search for available time blocks and the time you book it. For example, user1 runs a search in the Appointment Expert window. At the same time, user2 adds a provider non-clinic time. Then user1
selects an available time block (which now has a provider non-clinic time) and books the appointment. No warning is displayed, and axiUm displays the appointment in a non-clinic time.

**Solution:** Fixed. Now in the above scenario, axiUm displays a warning message indicating that the provider has a non-clinic time during the time to be scheduled.

---

**88377 - Hygiene appointments for child patients not working**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** when you schedule hygiene recalls for children in Appointment Expert, axiUm displays the message, “The selected patient cannot have hygiene recalls with a CDA. Cannot proceed.”

**Solution:** The error now only displays when:

- Patient is an adult (age is over maximum age for CDA to work on children as specified in system options).
- Patient is a child and the CDA is not allowed to perform treatments on children (as specified in Provider Types).

Also in the Provider Assignments window (in Patient Info window - Personal tab - Assignment section - Provider button) the following terminology changes were made to the options displayed in the Schedule Hygiene with drop-down field:

<table>
<thead>
<tr>
<th>Current:</th>
<th>New:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any hygienist</td>
<td>Any hygienist / CDA</td>
</tr>
<tr>
<td>Assigned hygienist only</td>
<td>Assigned hygienist / CDA only</td>
</tr>
<tr>
<td>Assigned hygienist or same provider type</td>
<td>Assigned hygienist / CDA or same provider type</td>
</tr>
<tr>
<td>Any hygienist or enhanced CDA</td>
<td>(same)</td>
</tr>
</tbody>
</table>

---

**88380 - Reserve time truncates when patient is indicated as seated**

**Module:** Scheduler - Active tab

**Problem:** Occasionally, when you indicate that the patient is seated, the start or end time of the reserve record associated to that time block in the provider’s work schedule changes to match the start or end time of the appointment.

**Solution:** Fixed.

---

**88385 - Appointment Expert offers instructor non-clinic times (2)**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** axiUm is not considering instructor non-clinic time defined in the instructor’s work schedules.

Note: This is different from 88150, where axiUm was not considering instructor non-clinic time defined in the session layout.
When you search for instructor availability, axiUm does not take the instructor's partial-day, non-clinic time into consideration, offering all time blocks in the instructor's day.

Setup to reproduce:

1. Make sure you stamp the instructor's name on a chair:
   - In Maintenance module - Instructor Schedules icon - Instructor Working Schedules window - Details button - Instructor Schedule Detail window - (Select Chairs for Instructor) - Select Chairs for Instructor window, click on a chair (e.g. Chair1)
2. Make sure you set up the instructor's non-clinic time:
   - In Maintenance module - Instructor Schedules icon - Instructor Working Schedules window - (Times Off) - Instructor Times Off window, create a partial-day non-clinic time (e.g. this Friday, 12:00pm - 5:00pm)
3. Make sure you clear all of the Appointment Expert window's search rules:
   - In Scheduler module - (Expert) - Appointment Expert window - Options button - Appointment Expert Options - Rules button - Appointment Scheduling Rules, clear all checkboxes to minimize interference with pre-existing provider's or instructor's rules.

Steps to reproduce:

1. Open the Appointment Expert window and enter the following:
   - Provider: Select the provider in the same chair as instructor (i.e., Chair1).
   - Instructor: Select the instructor you set up (in setup step #1).
   - Code: any appointment code that both the provider and the instructor can use.
   - Date Range: Select the day the instructor has a partial-day, non-clinic time (i.e., this Friday).
2. Click the Search button.
   - axiUm display search results for time blocks during the instructor's partial-day, non-clinic times (i.e., Friday afternoons).

Solution: Now in the above scenario, axiUm obeys instructor's partial-day, non-clinic times.

---

88391 - Problems with Appointment Expert window in preview mode

Module: Scheduler ~ Appointment Expert window (preview mode)

Problem: When you highlight an item in the Appointment Expert window (preview mode), axiUm highlights the associated time block in the Scheduler window's Active tab. Sometimes this highlight disappears.

Solution: Fixed.

---

88479 - Schedule importing allows reserves on unavailable chairs

Module: Scheduler
**Problem:** During the schedule import process, axiUm lets you import schedules into unavailable chairs, resulting in providers assigned to unusable (grayed out) chairs. Because you cannot make these chairs available, they remain unused during those dates and times.

**Solution:** Now in the above scenario, during the import process, axiUm displays the message, "Chair is not available on the specified date" and does not import provider schedules into these chairs.

---

**88513 - Hovering appointment disappearing**

**Module:** Scheduler

**Problem:** In some cases, if you reschedule an appointment, and you click 📅 (Book) to display the Appt. Book window and select a different book, the rescheduled (yellow hovering) appointment block disappears from the Scheduler window.

**Solution:** Fixed.

---

**88515 - Appointment List window refresh**

**Module:** Scheduler ~ Appointment List window

**Problem:** In the Appointment List window (in Scheduler module - 📊 (Print List)), if you click on the Preview button or the Print button, axiUm refreshes the whole book. This should not happen.

**Solution:** Fixed.

---

**88521 - Appointment Expert offering unavailable times**

**Module:** Scheduler ~ Appointment List window

**Problem:** In the Appointment Expert window, if you select the Only List Matching Disciplines checkbox, axiUm offers unavailable times.

**Solution:** Fixed.

---

**88530 - Misleading title bar**

**Module:** Scheduler ~ Appointment List window

**Problem:** The Appointment List window (in Scheduler module - 📊 (Print List)) has a similar name to the Appointment Lists window (in Scheduler module - 📊 (Lists)).

**Solution:** Changed the title bar from Appointment List to Print Appointment List.
88564 - Appointment Expert window offers non-clinic times

Module: Scheduler ~ Appointment Expert window

Problem: When you run a search in the Appointment Expert window, axiUm does not consider the selected provider’s full-day, non-clinic times.

Setup to reproduce:

1. Make sure your provider has the following setting:
   In the Provider Non-Clinic Times window (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - (Non-Clinic Times), define a full-day, non-clinic time.

Steps to reproduce:

1. Go to the Appointment Expert window (in Scheduler module - (Expert)).
2. Select the Search on Available Chairs option.
3. In the Provider field, enter the provider defined in the setup.
4. In the Time Range section, enter the From field and the To field.
5. Click the Search button.
   axiUm displays the search results, including those time blocks during the provider’s non-clinic day (as defined in the setup).

Note: If the time range is left blank, axiUm considers provider non-clinic times by omitting these times blocks from the search results.

Solution: Fixed.
86282 - Access to books

**Module:** Scheduler - Active tab

**Problem:** Users with no access to certain books can still edit appointments scheduled in those books.

In the following scenario:

- user1 has access to book1 only
- user2 has access to book2 only
- patient has appointments in book1 (9:00am) and book2 (11:00 am)

If user1 opens book1 and selects the 9:00am appointment, and then selects the Next appointment right-click option, axiUm displays a message indicating that user1 has no access to that book. This is fine. However, axiUm still displays the Edit Appointment window for the next appointment (11:00am) and allows user1 to edit this appointment scheduled in a book for which they have no access.

**Solution:** Fixed. Now after the warning message, axiUm no longer displays the Edit Appointment window.

---

92754 - Hold times not releasing

**Module:** Scheduler - Active tab

**Problem:** When you book appointments through the Active tab, axiUm is not releasing hold times you set up in the Hold Time Reasons window (in Maintenance - Scheduler tab - Hold Time Reasons icon), which you then applied to Provider Ideal Day Settings (in Maintenance - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - Details button - Provider Schedule Detail window - (Ideal Day Setup)).

**Solution:** Now when you book appointments through the Active tab, axiUm obeys the hold times in the provider's ideal day settings.

---

92842 - Wait List Reason's Expiry Warning window not displaying

**Module:** Scheduler ~ Appointment Lists window

**Problem:** In the Scheduler module - (Lists) - Appointment Lists window - Wait List tab, if you select a grayed out record (one caused by expiry) and select the Check for Warnings and Error right-click option, axiUm does not display a warning indicating the reason for this record being grayed out (i.e. it expired). axiUm displays these warnings only if the record was grayed out due to other reasons (e.g. break time was violated).

**Solution:** Fixed so that selecting expired (grayed) records and selecting the Check for Warnings and Error right-click option always displays the warning associated to it.
92905 - Reassigned appointments not in the Info Manager reports

**Module:** Scheduler - Chair tab

**Problem:** When you select the Reassign Appointments right-click option and reassign the appointments from one clinic to a different clinic, the Appointment Procedures report (in Info Manager module - Appointment tab - Appointment Procedures category) contains no chair layout information on the destination chair (in the Report Definition window, the Chair Layout file's Chair.L Discipline field and the Chair.L Group field; and the Chair Supervisor file's Instr. Name field.).

**Solution:** Fixed.

---

92931 - Duplicate chart requests using Appointment Expert window

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When appointments are booked through the Appointment Expert window, axiUm submits two chart requests for the appointment:

- The first chart request is created when the Appointment Expert window creates a hovering appointment block based on the date and time selected from the appointment expert.
- The second chart request is created for the date and time that you booked the appointment, if it's different from the one selected from the Appointment Expert window.

Setup to reproduce:

1. Make sure your user account has the following setting:
   
   In Maintenance module - Office tab - Users icon - Users List window - run a search - highlight item from list view - (Edit Record) - Users window - Additional tab - Charts section, the Disable Auto Chart Request checkbox is deselected.

2. Make sure that the patient's record has the following setting:
   
   In the Patient Info window - Codes tab - Additional section, the Paper Chart checkbox is selected. This indicates that the patient has an existing paper chart so that when you book an appointment, axiUm can submit a chart request.
3. Make sure that Appointment Expert Options window has the following setting:

In Scheduler module - (Expert) - Appointment Expert window - Options button - Appointment Expert Options window, the 'Make Appts' button will schedule automatically at time selected checkbox is deselected. This will create a hovering appointment block as opposed to a booked appointment block.

Steps to reproduce:

1. Log onto axiUm.
2. Go to the Scheduler module - (Expert) - Appointment Expert window, and search for an open appointment time.
3. From the search list, highlight an item.
4. Click the Make Appts button.

   axiUm creates a hovering appointment block.
5. Book the hovering appointment block in a time block that is different from the one you selected in the Appointment Expert window.
6. Go to the Chart Tracker module, and run a search for this patient's chart request.

   axiUm displays two chart requests:
   
   • One for the time block suggested by the Appointment Expert window
   • One for the time block that you booked the appointment

Solution: Fixed so that in the above scenario, axiUm no longer submits two chart requests.

---

92938 - Report problem due to garbage data

Module: Scheduler ~ reports

Problem: When you print a report (e.g., visit slips), existing non-scheduled appointments (i.e., those that are planned, pending, or rescheduled) is creating garbage data, and is interfering with the report process.

Solution: Fixed.
92939 - Inconsistent cancellation behavior

Module: Scheduler ~ Edit Appointment window, Edit Planned Appointment window

Problem: Clicking the Cancelled button in the Edit Appointment window or clicking the Cancel button in the Edit Planned Appointment window both do not behave the same way as the Cancel right-click option from the Scheduler window’s Active tab. In the second method (right-click method), axiUm displays additional windows (e.g., the Cancellation window, the Reschedule Now Question window). The first method (button-click method) should have the same behavior, but currently does not.

Solution: Fixed. Now clicking the Cancelled button in the Edit Appointment window or clicking the Cancel button in the Edit Planned Appointment window works the same way as the Cancel right-click option.

92942 - Status drop-down field displays incorrect list of options

Module: Scheduler ~ Appointment Lists window

Problem: When you go to the Appointment Lists window (in Scheduler module - (Lists)), and you click on the Recalls tab, the Status drop-down field displays incorrect list of options:

- Previous versions (e.g. 4.61): axiUm correctly displays recall status codes. These recall status codes are defined in the Status Codes window (in Maintenance module - Basic tab - Status Codes icon), as a record of type Recall.
5.0 Bug Fixes

Modified: 25-Oct-11

- Current version (4.81.09): axiUm *incorrectly* displays appointment status codes. These appointment status codes are set up in the Status Codes window (in Maintenance module - Basic tab - Status Codes icon), as a record of type *Appointment*.

The Appointment Lists window’s Recall tab’s Status drop-down field should display recall status codes, as it did in previous versions.

**Solution:** Fixed.

---

**92984 - Patient Balances report causes SQL error**

**Module:** Info Manager - Billing tab

**Problem:** In the following scenario:

1. From the Category list box, select Patient Balances.
2. Click the Search button to run the report.
3. From the list view, right-click and select the Edit Report option to display the Report Definition window.
4. From the Files list box, select Patient Balance.
5. From the Fields list box, select Last Activity Date.
6. Click the Add button to move the Last Activity Date field from the Field list box to the Selected list box.
7. Click the OK button to close the Report Definition window and return to the Info Manager window.
8. Click on the Last Activity Date column heading to display the Column Conditions window.
9. In the Operator drop-down field, select **Less than**.
10. In the Value 1 field, enter a date (e.g. today’s date).
11. Click the Add button to add this operand to the list view.
12. Click the Close button to close the Column Conditions window and return to the Info Manager window.
13. Click the Search button to run the report.
   axiUm displays a Database Warning window.

**Solution:** Fixed.

---

**93013 - Checked out patients show as checked in**

**Module:** Scheduler - Active tab

**Problem:** If you check in a patient and then check them out (from the Scheduler module, not the Rolodex module), adding another appointment (either the same or different patient), causes axiUm to revert the previously checked-out patient to checked-in status. Refreshing the window by closing and re-opening the Scheduler module corrects this.

**Solution:** Fixed.

---

**93016 - New planned appointments display no creation dates**

**Module:** Scheduler ~ Patient Appointments window, Family Appointments window

**Problem:** When you create a planned appointment, axiUm is not populating the CreateDate field in the internal database.

**Solution:** Fixed.

---

**93054 - Allows entry of 2 different active recalls per patient**

**Module:** Scheduler ~ Patient Recalls window

**Problem:** Lets you enter two active (but different) hygiene recalls for the same patient.

**Solution:** Now you can enter only one active preventive care recall, per patient, at any time. If you try entering more than one active recall on the same patient, axiUm displays a message.

---

**93074 - Search offers provider’s non-clinic time**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** If a patient requires a hygiene-with-exam recall, and the provider for the exam has a partial non-clinic time (e.g. 12:00pm - 2:00pm). Running a search in the Appointment Expert window offers time during the provider’s non-clinic time (e.g. 12:00pm).

**Solution:** Fixed.
93123 - Appointment Expert overlapping appointments

Module: Scheduler ~ Appointment Expert window

Problem: In some cases, when you set up the Appointment Expert window to book the appointment directly in the Scheduler window, axiUm does not check for overlaps. Note that when axiUm displays a warning indicating the overlap and you click the Yes button, it will still book the overlapping appointment. If you click the No button, it will not book it.

Solution: Fixed.

96297 - Chart requests are not automatically submitted

Module: Scheduler ~ Appointment Expert window

Problem: When scheduling a planned appointment for certain appointment types (e.g., Emergency, Urgent), axiUm is not automatically submitting a chart request.

Solution: Fixed. axiUm now submits a chart request.

96397 - Cannot left-click to move reservation

Module: Scheduler - Chair tab

Problem: If you are using chair mode and reserve a chair by left-clicking it, you can also move the reservation by left-clicking on a different chair (if you are allowed only one chair at a time). However, if the reserved chair contains appointments, axiUm displays the message, “The provider has another appointment in another chair. Cannot proceed!” You should be able to move your own reservations using this method.

Solution: Fixed.

96404 - Using the Based on Appt Book option on large books

Module: Scheduler ~ Appointment Expert window

Problem: When using large dynamic books, selecting the Based on Appt Book option causes axiUm to crash.

Solution: Fixed.

96461 - Appointment reason code does not default

Module: Scheduler - Active tab

Problem: When booking an appointment using the Appointment Expert window, axiUm is not using the default reason associated to the selected appointment code (defined in Maintenance module - Scheduler tab - Appt. Codes icon - Appointment Code window). Booking an appointment in the Active tab works fine.
**5.0 Bug Fixes**

**96469 - 2nd provider time incorrect on printout**

**Module**: Scheduler - Active tab

**Problem**: When you click 📑 (Print View), to print the current view, the details for the second provider does not match what is displayed in the Scheduler.

**Solution**: Fixed.

---

**96515 - Duplicate message**

**Module**: Scheduler - Active tab

**Problem**: When adding an appointment in the past, axiUm displays the message, “Appointment is in the past. Do you want a chart request?”

- If you click the Yes button, axiUm closes the message and does not display it again. This is fine.
- If you click the No button, axiUm displays this message a second time. After the second message, clicking either the Yes or No button closes the message and axiUm does not display it again.

**Solution**: Fixed.

---

**96758 - Appointment Expert search offers holidays**

**Module**: Scheduler ~ Appointment Expert window

**Problem**: Appointment expert returns results on clinic holidays.

**Setup**:

1. Go to the Clinic Holidays window (in Maintenance module - Scheduler tab - Clinic Holidays icon), set up a holiday on December 25\(^\text{th}\), and apply it to all clinics.
2. In the Appointment Expert window, select the Search on Available Chairs option.

**Steps to replicate**:

Search for appointments on December 25\(^\text{th}\).

axiUm displays results. It should not offer any dates since all clinics are closed for holidays this day.

**Solution**: Fixed.
97130 - Time block length does not save  
**Module:** Scheduler ~ Scheduler Options window  
**Problem:** Go to the Scheduler Options window (in Scheduler module - 🛠️ (Options/Settings)). In the Options section’s Time Block Length drop-down field, select an option, and then click the Accept button. When you re-open the Scheduler Options window, this drop-down field is blank. 
**Solution:** Fixed so that in the above scenario, the time block length selected remains displayed.

97194 - ObjectWindow Exception message  
**Module:** Scheduler - Active tab  
**Problem:** In some cases, while working in the Active tab, axiUm displays the ObjectWindow Exception window and you are forced to restart axiUm. 
**Solution:** Fixed.

97415 - Problem with overlapping appointments  
**Module:** Scheduler - Availability tab  
**Problem:** In some cases, axiUm displays an error indicating that you have reached your clinical limit even if you have not. 
**Solution:** Fixed.

97513 - Missing Stage field in ortho appointment history  
**Module:** Scheduler - Active tab  
**Problem:** The Appointment History window does not include the Stage field that is used in ortho-type appointments. 
**Solution:** Fixed so that the Appointment History window (for ortho appointments) now includes the Stage field.

97636 - The duplicate option not optimized  
**Module:** Scheduler ~ Appointment Expert window  
**Problem:** Sometimes, deselecting the Allow duplicate search results checkbox in Appointment Expert Options window is not working optimally. For example, in a multi-chair case, axiUm displays a later time block for the 1st chair when a slightly earlier time block in the 2nd chair would have been preferable.
**97729 - Scheduling rule interfering with provider booking**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** The Limited Provider Exams (for Preventive Care) scheduling rule in the Appointment Scheduling Rules (Expert Settings) window is enforced on all types of appointments. axiUm should enforce this only for hygiene-type appointments. This means that if the provider has reached their limit of exams for a period of time, running a search in the Appointment Expert window will not offer this time for any appointments, even if the provider has open time and they are not trying to book a hygiene-type appointment.

**Setup:**

1. Set up a provider up with the following:
   - Go to the Maintenance module - Office tab - Users icon - Users List window - run a search - highlight item in list - (Edit Record) - Users window - Provider tab - Scheduler section. Select the Limit Exams checkbox and in the **(at any given time)** field, enter 1.
   - In the Scheduler window - Chair tab, reserve a chair for this provider.

2. Set up a patient with the following:
   - The Preventive Care Details window displays an Exam due today that is not completed.
   - Book a hygiene-type appointment for this patient with any hygienist and the above provider as the 2nd provider. Make sure the appointment requires a portion of this provider's working time.

3. Set up the Scheduler module with the following:
   - Go to Scheduler module - (Expert) - Appointment Expert window - Options button - Appointment Expert Options window - Rules button - Appointment Scheduling Rules (Expert Settings). Select the Limited Provider Exams (for Preventive Care) checkbox.

**Solution:** Fixed.
Steps to reproduce:
In the Appointment Expert window, run a search for this provider for this appointment.

axiUm does not display the time for this appointment.

**Solution:** Fixed.

---

**98038 - Exam time not removed**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** If you schedule an appointment where axiUm automatically adds the required exam time, and you later change this appointment to a planned one, axiUm retains the original exam time it added. In other words, the planned appointment time now includes the exam time that axiUm automatically added, and booking this planned appointment will automatically add a second exam time on top of this.

**Solution:** Fixed.

---

**98360 - Unable to book ortho appointments**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** You cannot book an ortho appointment for provider types who have access to the practice’s default ortho appointment code.

Make sure you have the following setup:

- Your practice has a default ortho appointment code.
Go to Maintenance module - Office tab - Practice Address icon - Practices window - 📦 (Practice Options) - Practice Options window - Ortho Settings - Ortho Appointment Code field.

- The provider type has access to this appointment code.
- The Scheduler module's options are set up for ortho entry.

Then go to the Scheduler module, open the New Appointment window, and enter the details using a provider type from the above setup. axiUm displays the message, “The provider does not have access to the ortho appointment code setup for this practice. Cannot proceed!”

**Solution:** Fixed.

---

**98440 - You can book appointments in the past**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When searching for reserved chairs in the past, and you set up axiUm to automatically book the time block you select (in the Appointment Expert window - Options button - Appointment Expert Options window - Appointments section, the 'Make Appts' button will schedule automatically at time selected checkbox is selected), when you click the Make Appts button to book it, axiUm allows you to book this past appointment.

**Solution:** Fixed so that in the above scenario, you cannot book past appointments.

---

**98444 - Automatic chart requests submitted when it should not**

**Module:** Scheduler - Active tab

**Problem:** In the following scenario setup:

- Patient has a paper chart (in Patient Info window - Codes tab - Additional section, the Paper Chart checkbox is selected).
- The user does not use automatic chart request (in Maintenance module - Office tab - Users icon - Users List window - run a search - 📝 (Edit Record) - Users window - Additional tab - Charts section, the Disable Auto Chart Request checkbox is selected).

When you book an appointment for this patient with this user, axiUm automatically submits chart requests.

**Solution:** Fixed.

---

**98525 - Minimum time between results**

**Module:** Scheduler ~ Appointment Expert window
Problem: Minimum time between results is throwing out the result that leaves a larger gap rather than the one that leaves the smallest gap, resulting in sub-optimal results.
Solution: Fixed.

---

98543 - Open time blocks to fill wait list not working
Module: Scheduler - Active tab
Problem: In some cases, while working in chair method of booking, when you highlight the last 30 minutes of the session’s open time block and select the Fill from Wait List right-click option, axiUm does not recognize it as an open time block and displays a warning.
Solution: Fixed. The warning no long appears in the above scenario.

---

98556 - Overlap warning not displaying
Module: Scheduler ~ Appointment Expert window
Problem: When booking an appointment and you set up axiUm to automatically book the time block you select (in the Appointment Expert window - Options button - Appointment Expert Options window - Appointments section, the 'Make Appts' button will schedule automatically at time selected checkbox is selected), axiUm does not display the Patient Appointment Overlaps Warning window to indicate that this patient has another appointment for the same time in a different chair.
Solution: Fixed so that in the above scenario, axiUm displays the Patient Appointment Overlaps Warning window.

---

98676 - Misleading checkbox name
Module: Scheduler ~ Scheduler Options window
Problem: In the Scheduler Options window, the checkbox name Show New Appointment Window when Booking Recalls should be renamed to Show New Planned Appointment Window when Booking Recalls with Expert.
Solution: Fixed.

---

98844 - Problems using Reassign Appointments feature
Module: Scheduler - Active tab
Problem: If you select the Reassign Appointments right-click option to move appointments from a provider whose chair reservations were created from a work schedule to a provider who has no chair reservations for that date (and keep the same chair and clinic), you end up with both providers having chair reservations for the same chair on this date.
Solution: Fixed.
98860 - Appointment Expert deletes appointment discipline

**Module:** Scheduler ~ Appointment Expert window

**Problem:** axiUm always resets the discipline based on the appointment code. This is fine if you are in the Appointment Expert window without an appointment. However, if you take an appointment into the Appointment Expert (e.g., right-click a yellow hovering appointment block and select the Appointment Expert option), axiUm deletes the discipline associated to the appointment code. axiUm should retain this.

**Solution:** Fixed.

---

99005 - Appointment background color shows black

**Module:** Scheduler - Active tab

**Problem:** In the following setup:

- You have a status code for a *patient*.
  
  In the Status Codes window (in Maintenance module - Basic tab - Status Codes icon), for status type Patient, the Code field displays NEWPAT.

- You have a status code for an *appointment* using the same name as the status code for the patient.
  
  In the Status Codes window (in Maintenance module - Basic tab - Status Codes icon), for status type Appointment, the Code field displays NEWPAT, and the Appointment Bkg Color field shows a color other than black.

- The Scheduler Options window’s Options section has Appt Background Color drop-down field displaying the Status Colors option.

Then when you make an appointment (using appointment status NEWPAT), for a patient (with patient status NEWPAT), the Scheduler window’s Active tab displays this time block in black background.

**Solution:** Fixed. Now in the above scenario, axiUm displays the appointment background color.

---

99113 - Not Before field is cleared on planned appointments

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you schedule an existing planned appointment using the Appointment Expert window, and this planned appointment displays a value in the Not Before field, this date becomes cleared when axiUm books the appointment. Then if you cancel this appointment, it reverts to a planned appointment (this is fine), but there is no longer a value in the Not Before field.

Scheduling and cancelling an appointment using the T3 IVR works fine.

**Solution:** Fixed so that cancelling an appointment -- created from a planned appointment and booked using the Appointment Expert window to book it -- will now retain the value of the original planned appointment’s Not Before field.
**99200 - Appointment Display Option window not working properly**

**Module:** Scheduler ~ Appointment Display Options window  

**Problem:** The Active tab does not display as set up in the Appointment Display Options window. For example, in the Appointment Display Options window, you go to Line 1-5 drop-down fields and select the options for appointment code, clinic name, and chair name. Then you schedule an appointment using the Appointment Expert window. The Active tab displays the instructor's first and last name (instead of the appointment code), the rest of the information is correct. If you close and re-open the Scheduler module, axiUm displays the information correctly (i.e. the appointment code, not the instructor’s name).  

**Solution:** Fixed.

---

**99222 - Modifying records in the Additional Appointment Info window**

**Module:** Scheduler ~ Appointment Expert window  

**Problem:** When you have more than the maximum 10 records allowed in the Additional Appointment Info window, trying to add an 11th record displays a message stating that there is a limit of 10 additional appointments. This is fine. Click OK to close this message box and to cancel creating this 11th record. Then if you try modifying one of these 10 records, the same message appears, even though you are not adding another appointment and you are within the limit.  

**Solution:** Fixed so that in the above scenario you can modify any of the 10 existing records in the Additional Appointment Info window.

---

**99349 - Incorrect search results for multi-chair day exception**

**Module:** Scheduler ~ Appointment Expert window  

**Problem:** For example, when the following conditions are met:

- A provider has three chair reserves for the same day (both morning and afternoon).
- They have work schedule exception time reserved in the three chairs as individual separate time slots.
- One of the chairs has an appointment set up at the beginning of the day, with the time that partially overlaps reserve times of the other two chairs.
Then when you run a search, axiUm is not looking into other available time blocks for the morning session.

**Solution:** Fixed so that in the above scenario all available times are offered.

---

**99382 - Appointment Expert overlaps**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** If you set up a multi-chair day for a provider (allowing overlaps), and add an appointment at the beginning of one of the reserves, running a search should offer all chairs except the one with the appointment. However, axiUm displays fewer results than expected.

**Solution:** Fixed so that axiUm displays results (at the start of their reserves) for all chairs except the one with the appointment already in it.

---

**99384 - Searching multiple appointments ignore some break times**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you use the Appointment Expert window to search for multiple appointments, and a provider's break time rule is violated, axiUm books some appointments even if you indicate to retain break rules.

**Solution:** Fixed. The appointment expert will no longer offer times for multiple appointments that violate break time restrictions.

---

**99463 - Checking in failed/planned appointments**

**Module:** Scheduler - Active tab

**Problem:** If user1 at workstation1 failed an appointment and then changed it to a planned appointment, user2 working simultaneously on the same appointment at workstation2 can still check in the appointment.

**Solution:** Fixed.

---

**99639 - Inconsistent patient selection**

**Module:** Scheduler ~ Family Appointments window

**Problem:** This affects only the Family Appointments window, not the Patient Appointments window. axiUm is inconsistent with the patient selection method.

- If you go to an appointment and select the Family Appointments right-click option, OR go to the Patient Card window or the EHR window - Tx History tab and then double-click on an appointment... axiUm displays the Family Appointments window with the patient selected (checkbox selected) and axiUm highlights the item in the list.

- If you go to the Scheduler window and click (Rolodex) and select a patient, OR go to the EHR window's Prev Care tab and select the Patient Appointments right-click option, OR go to the Rolodex window and click (Patient Appointments), OR go to the Patient...
Card window and click (Patient Appointments). axiUm displays the Family Appointments window with the patient selected (checkbox selected) BUT axiUm does not highlight the item in the list.

Without the highlighted record, axiUm cannot display the details in the Patient Information section.

**Solution:** Fixed so that the patient is always highlighted in the Family Appointments window. This ensures that axiUm displays patient details in the Patient Information section.

### 99660 - Giving results in wrong clinic

**Module:** Scheduler ~ Appointment Expert window

**Problem:** Sometimes when searching for a provider and a hygienist’s time, axiUm offers:

- Time in different clinics for the same patient at the same time.
- Time in a clinic that the provider is not scheduled to be in.

**Solution:** Fixed.

### 100154 - Hygiene recall alternatives display issue

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When axiUm finds a different hygienist in the same group, the list view’s column heading displays Different Group.

**Solution:** Fixed to display Same Group.

### 100174 - Appointment Expert displays incorrect session

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you select the Search on Available Chairs option, and then run a search and select a time block, clicking the Preview button or the Make Appts button takes you to the correct clinic and date, but incorrect session.

**Solution:** Fixed.

### 100615 - Scrolling past 24-hour bounds on Active tab

**Module:** Scheduler - Active tab

**Problem:** When the Active tab is loading, or when you move between the Chair tab and the Active tab, axiUm scrolls the Active tab’s displayed time past the 24-hour range (e.g. -2:00am). This is beyond the time range you can manually scroll.

**Solution:** Now in the above scenario, axiUm no longer scrolls the Active tab up or down past the 24-hour range.
5.0 Bug Fixes

100734 - Blank appointment status
Module: Scheduler ~ Appointment Expert window
Problem: When you create a planned appointment containing an appointment status, and you book an appointment using the Appointment Expert window, axiUm clears this appointment status. This only occurs when you schedule a planned appointment using the Sch. w/Expert button in the Patient Appointments window or the Family Appointments window.
Solution: Fixed.

100747 - Instructor field is blank
Module: Scheduler ~ Appointment History window
Problem: When viewing the Appointment History of planned appointment records (in Scheduler module - (Rolodex) - select a patient - Patient Appointment window or Family Appointment window - select a planned appointment record - History button), the Instructor field is blank.
Solution: Fixed to display the instructor that you selected when you created or edited the planned appointment.

101121 - Active tab flickering
Module: Scheduler - Active tab
Problem: Active tab appears to flicker.

In the following setup:
- In Maintenance module - Scheduler tab - Scheduler Options icon - Scheduler Options window - Scheduler Type section, Indicators button - Appointment Indicators to Display window, no indicators are selected for display and the Show Indicators checkbox is deselected.
• In Maintenance module - System tab - Station Options icon - Station Options window - Scheduler section - Scheduler section - ShowApptIndicators icon, the Default field displays 1.

Then when you open the Scheduler module’s Active tab, it is flickering. The workarounds is to either turn off the Show Indicators checkbox or select at least one indicator to display.

Solution: Fixed so that in the above setup, the Active tab no longer flickers.

101186 - Auto-reserving & booking appointment misses checks

Module: Scheduler ~ Appointment Expert window

Problem: If a provider is locked from booked appointments (in Maintenance module - Office tab - Users icon - Users List window - run a search - highlight a record from the list view - (Modify) - Users window - Provider tab - Locks section, the Locked from booked appts checkbox is selected). Then in the Appointment Expert window, you run a search on available chairs, axiUm misses the checks, resulting the error to display too late in the process or none at all.

Solution: Fixed so that in the above scenario, when you run a search on available chairs for this provider, axiUm prevents you from scheduling an appointment.

Transactions

57677 - Practice override

Module: Transactions - Treatment tab

Problem: In the following scenario:

You have set up your workstation override to the following:

Maintenance module - System tab - Station Options icon - Station Options window - Transactions section - Transaction section - PracticeOverride = 1

...And then you go to Transactions window - Treatment Tab - Planned tab and use the Complete as New Claim right-click option to complete a planned treatment.

... The practice does not default to the workstation’s practice (the one selected when you go to Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window).

Solution: Fixed.
64311 - Succession billing for assignment policies

Module: Transactions - Ins Pmt tab

Problem: For primary assignment policies that have $0, axiUm does not create a claim for the secondary insurance.

Solution: Fixed. When applying primary insurance payments, if the amount paid is $0 (and you applied $0), axiUm displays the message, "Do you want to create the claim for the next policy to be billed?"

75135 - Problem unallocating insurance payments & adjustments

Module: Transactions - Ins Pmt tab

Problem: In some cases, the InsAdj, InsAdj1, InsAdj2, and InsAdj3 buckets, and also InsTransfer, InsTransfer1, InsTransfer2, and InsTransfer3 buckets on the TRX record for a treatment are set to incorrect values.

Solution: Fixed.

84080 - Payment Plan Treatments window sort order

Module: Transactions ~ Payment Plan Treatments window

Problem: In the Payment Plan Treatments window (in Transactions module - Pmt Plan tab - Apply button), the records in the list view does not appear to be sorted by any particular order.

Solution: The Payment Plan Treatments window is now sorted by date.

84182 - Modifying procedure displays error message

Module: Transactions - Treatment tab

Problem: This applies only to extraction procedures. When modifying an extraction procedure (i.e., by changing field values), axiUm displays the error message "Cannot apply this on tooth. This requires the tooth to be present."

For example, if you add a C (completed) extraction for a site, then change the provider and click the Modify button, axiUm displays this message.

Current workaround is to unbatch and delete the procedure, and enter the same procedure again.

Solution: Fixed. Now axiUm no longer displays the error message when modifying a procedure.

84945 - Resetting incorrect year-end amounts

Module: Transactions

Problem: In some cases, patient year-end amount does not reset to $0.

Solution: Fixed.
85043 - Waive Dual Deductible's split amount is incorrect

Module: Transactions - Treatment tab

Problem: In the following setup:

- The **Waive smaller deductible if patient has dual coverage with the same company** checkbox is selected (in Maintenance module - Insurance tab - Parent Companies icon - Parent Companies window).
- Patient has dual coverage with two insurance companies under the same parent company.
- Both insurance policies have a patient deductible; Insurance1=$15.00 deductible, Insurance2=$20.00 deductible

Enter a treatment from the Transactions module’s Treatment tab and click the Split button to view the Treatment Split window. axiUum should charge the patient the higher of the two deductibles. However, axiUum charges the patient more or less than the $20.00 depending on the bill order of the two policies. axiUum should charge the patient the higher of the two deductibles and this amount should remain constant, regardless of the billing order.

Solution: Fixed. axiUum now charges the patient the higher of the two deductibles, regardless of billing order.

85136 - Expected Deductible not updating fields, Cancel not resetting values

Module: Transactions ~ Treatment Split window

Problem: In the Treatment Split window (in Transaction module - Treatment tab - Split button), there are three problems:

- When changing the expected deductible, axiUum does not update the patient deductible on the Treatment Deductibles window.
- When you click the Cancel button, axiUum resets the fields to their original values except for the expected deductible.

Solution: Fixed:

- Changing the expected deductible updates the patient deductible on the Treatment Deductibles window.
- Clicking the Cancel button will reset all the fields in the Treatment Split window to their original values.
- Also, if you enter an expected deductible that is more than the total, axiUum will cap it at the total.

85175 - Re-submitting claims for expired policies

Module: Transactions ~ Claim Forms window

Problem: If you re-submit a claim for a policy that expired on the treatment date, axiUum displays the message, “Insurance Policy is deleted or expired”.

Solution: Fixed.

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**85300 - Guarantor Statement issue**

**Module:** Transactions ~ Statements window

**Problem:** In the Statements window (in Transactions module - Treatment tab - Statement button), when you click the Print button to print the Statement report, and the guarantor is also a patient, the payment plan balance is incorrect, resulting in incorrect amounts in other dollar amount fields.

**Solution:** Fixed.

---

**85819 - EDI segment HI populates incorrectly**

**Module:** Transactions ~ Statements window

**Problem:** In EDI version X12N4010 Medical, when the claim contains treatment medical information, axiUm populates the EDI file’s segment H1 incorrectly.

**Solution:** Fixed.

---

**86406 - Item limit balance deducted twice with riders**

**Module:** Transactions - Treatment tab

**Problem:** In a rider policy, if an item limit has no category (even if it’s not a category limit and requires none), the limit balance is deducted twice.

**Solution:** Fixed. Now axiUm deducts the limit balance only once.

---

**86886 - Complete Treatments window closes**

**Module:** Transactions ~ Complete Treatments window

**Problem:** In the following scenario:

1. Go to the Transactions module and click on the Treatment tab.
2. From the list view, highlight an item and select one of the following right-click options:
   - Complete Tx
   - Complete Tx (Last Claim)
   - In Process Tx Visit
     axiUm displays the Complete Treatments window
3. Click in one of the Site fields.

axiUm closes the Complete Treatments window.

**Solution:** Fixed.
87327 - Problem when editing provider on NY Medicaid APG claim

Module: Transactions - Treatment tab

Problem: If you modify the record on the non-rate based line of a NY Medicaid APG claim it changes the total amount of the treatment to $0, but does not change the insurance amount. If there was originally an insurance amount, it results in a patient credit, an offsetting debit insurance amount, and an overall $0 total.

Solution: Fixed.

87826 - Alignment of $ figures on printout

Module: Transactions - General

Problem: After axiUm 4.61, the dollar amounts in the Trx Family Ledger report became left-aligned.

Solution: Fixed so that they are right-aligned as before.

88235 - Incorrect amount in Allocating Reserve Funds window

Module: Transactions ~ Allocating Reserve Funds window

Problem: In rare cases with some treatment total and current balance amounts, if you go to the Allocating Reserve Funds window (In Transactions module - (Reserve Fund) - Manage Patient Reserve Fund window), click the Apply button to display the Allocating Reserve Funds window, allocate an amount to an outstanding balance, and click the OK button, axiUm displays the following message, "Allocation process failed either because one or more of the txs were missing or having different owing amounts. Cannot proceed."

Solution: In these rare cases, axiUm no longer displays this error message.

88254 - Pre-payments not working

Module: Transactions - Payments tab

Problem: Occasionally, when you enter a new payment and click the Allocate button to display the Applying Payment window, click the Pre-pay button to display the Pre-payment Allocation window, enter the fields, and click the OK button, axiUm displays a message indicating that the applied amount exceeds the remaining held amount of the payment. This message is incorrect as no other user is applying this payment and the held amount is still the full amount of the original payment.

Note: If you wait for a long period (e.g., a few hours) you can apply this pre-payment. Or, a different user can log in and apply the pre-payment.

Solution: Fixed.

1 $ is available for patients whose insurance company has the Patient Reserve Funds (that are tracked) checkbox selected in the Insurance Company Advanced Options window.
**96374 - Duplicate message**

**Module:** Transactions - Treatment tab

**Problem:** When you create a treatment for a provider belonging to a provider type with no access to that treatment (but you are logged on as a user with access), clicking the Add button displays the message, "Selected procedure is not accessible for this Provider Type. Are you sure you want to continue?" When you click the Yes button, axiUm displays this message again.

**Solution:** Now this warning displays only once.

---

**97162 - EDI batch file field too long**

**Module:** Maintenance ~ EDI Claims window

**Problem:** axiUm truncates information for one line but not the other, resulting in Emdeon rejecting the entire file. For example:

- Truncated: NM1*FA*2*Advanced Education for Genera****XX*1861431306
- Non-truncated: NM1*87*2*Advanced Education in General Dentistry****XX*1861431306

**Solution:** Fixed length of batch file field.

---

**98036 - Refresh issue**

**Module:** Transactions - Notes tab

**Problem:** Sometimes, if you add/edit/delete a note in the Applying Ins Payment window (by going to Transactions module - Ins Pmt tab - Pt Allocate button - Applying Ins Payment window, and selecting the Transactions Note right-click option), axiUm does not update this in the Notes tab.

**Solution:** Fixed.

---

**98342 - Unbatching clears EDI data**

**Module:** Transactions - Treatment tab

**Problem:** When you highlight a record from the list view and select the UnBatch Claim right-click option, axiUm may possibly clear some of the EDI processing information in the background. This causes problems when dealing with second and third insurance policies.

**Solution:** Fixed.

---

**98433 - Diagnosis code is deleted**

**Module:** Transactions - Treatment tab

**Problem:** Modifying the Discipline drop-down field or the Phase field for a planned procedure clears the Diagnosis code (displayed in the EHR module) entered when the treatment was originally created in the EHR window's Chart Add tab.
**99062 - NY Medicaid problem when rebilling ancillary**

**Module:** Transactions

**Problem:** Deleting the NY Medicaid rate code changes all the treatments to non-NY-Medicaid. The new ancillary code cannot handle the rebilling of NY Medicaid and non-NY-Medicaid treatments at the same time.

**Solution:** Fixed.

---

**99729 - Problems consolidating procedure codes for NY Medicaid**

**Module:** Transactions ~ EDI Claims window

**Problem:** When you consolidate some procedure codes to a single line and then generate a batch file, the line numbers for these procedure codes are out of sequence in the claim file.

**Solution:** Fixed.

---

**100149 - NY Medicaid error message rebilling ancillary with regular**

**Module:** Transactions - Treatment tab

**Problem:** If you select an ancillary treatment from yesterday, plus a regular treatment from today (with its rate code), rebilling the treatment displays the message, "A medicaid visit requires all non-ancillary treatments to have the same treatment date". In this case, this message should not display.

**Solution:** Fixed.

---

**100224 - EDI Batch allowing carriage returns in batch file**

**Module:** Transactions ~ EDI Claims window

**Problem:** When you enter notes in a claim form (e.g. ADA Insurance Claim [EDI Claim] window), you can insert a hard return (a new line manually created by pressing the Enter key). However, doing so creates a break in the batch file, causing Emdeon to reject the entire file.

**Solution:** Fixed. Now if a comment field contains hard returns, axiUm replaces them with spaces before submitting the claim.

---

**100248 - Rebilling a treatment not resetting frequency limits**

**Module:** Transactions ~ Rebill Treatments window

**Problem:** If a patient is on insurance that has a frequency limit for a treatment, and the treatment is rebilled, axiUm does not reset the frequency, and the patient is charged as insurance indicating Item frequency Used.
5.0 Bug Fixes

100275 - Enforcing rules for teeth being present
Module: Transactions - Treatment tab

Problem: When you enter a treatment on a missing tooth (e.g. a molar on a patient with primary dentition), axiUm displays the error message, "This procedure requires a tooth to be present". This used to be allowed in previous versions. Need to enable this capability again.

Solution: Fixed.

100333 - NY Medicaid error message
Module: Transactions

Problem: The following message, "A Medicaid visit requires all non-ancillary treatments to have the same treatment date," can be misleading in cases where all non-ancillary treatments do have the same treatment date.

Solution: Now when all non-ancillary treatments have the same treatment date, axiUm displays the message, "A Medicaid visit must have exactly one rate code."

100691 - Place of Service value on Tx Medical Information window
Module: Transactions ~ Tx Medical Information window

Problem: In the Treatment tab, when you add a treatment to a claim, axiUm sometimes defaults the place of service; this is based on either the procedure code setup or the value entered in a previous treatment for the same claim. You can see this default value when you open the Tx Medical Information window and look in the Place of Serv. drop-down field. Because axiUm automatically enters this default value, it appears that axiUm has also saved it. However, when you click the Cancel button, axiUm deletes this value when the Tx Medical Information window closes, and you are unaware of this because axiUm displays no warning.

Solution: Fixed so that in the above scenario, clicking the Cancel button displays a warning. You must click the OK button in the Tx Medical Information window to save the place of service code.

100736 - X12N 4010 medical claim formatting
Module: Transactions ~ EDI Claim window

Problem: SBR05 must be either left blank or filled in depending on the situation. Currently, axiUm is not correctly doing this.

Solution: Fixed so that:
- For 4010 Medical claims, SBR05 is always populated.
- If secondary is not Medicare, SBR05 defaults to value OT.
- For 4010 Dental claims, SBR05 is always blank.
100737 - Secondary medical claims on 4010

Module: Transactions ~ EDI Claims window

Problem: When you print a secondary medical claim for Medicare on a 4010, axiUm leaves the insurance type code SBR05 (medical reason code) blank.

Solution: Fixed so that when the secondary or tertiary insurance is Medicare, you are required to enter this medical reason code in the associated claim window when you submit it. If you do not enter a medical reason code, axiUm displays an error message.

100906 - Practice address cut off on receipt printout

Module: Transactions - Payments tab

Problem: Sometimes, if the practice address (entered in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window) is long and also uses wide fonts (like the letter M or the number 5), when you print a patient receipt (in Transactions module - Payment tab - Receipt button - Receipt Printout window), axiUm does not print the full practice address within the available space in the box.

This same practice address prints fully on statements. The problem only occurs on receipts.

Solution: Fixed.

101208 - Payment allocation problem

Module: Transactions - Payments tab

Problem: When you allocate a payment to two pre-payments and then a treatment, axiUm is not updating the correct totals, resulting in over-allocation of payments.

Solution: Fixed.

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EHR

101438 - Objectives tab interfering with updates

Module: EHR - Objectives tab

Problem: When you are viewing information about patient1 and you go to the Patient menu and select patient2, the information in the Objectives tab changes to reflect patient2, this is fine. However, when you return to the Patient menu and select the Previous Patient option (patient1), the Objectives tab still displays patient2's information.
Solution: Fixed so that the information in the Objectives tab changes to reflect the currently selected patient.

101497 - Inconsistent behavior of tooth surface rules
Module: EHR - Chart Add tab
Problem: If you go to the Procedure Code window (in Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - run a search - highlight item - (Edit Record)), and in the Graphic Detail section, you set up the following:

- Type: Illustrated
- Zone: Nowhere
- Surf. Number: any value

This combination is incorrect, but axiUm lets you save this procedure code.

Then when you go to the Chart Add tab and select this procedure code, you can add surfaces to this procedure. Then if you edit the treatment in the Tx History tab, axiUm removes the surfaces.

Solution: Now in the above scenario, if the Procedure Code window's Graphic Detail section has the Type drop-down field displaying the Illustrated option and the Zone drop-down field displaying the Nowhere option, axiUm disables the Surf. Number field. Then in the EHR module, when you select this procedure, the Surfaces field is disabled.

101778 - Allows abnormal procedure code definition
Module: EHR - Chart Add tab
Problem: If you go to Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - Procedure Code window - Graphic Detail section, and enter the following:

- Type: Extraction
- Surf. Number: [any number of surfaces]

When you go to the EHR module’s Chart Add tab and add a treatment using this procedure code, axiUm does not switch codes correctly based on mouth area (e.g. anterior, posterior, etc.).

Solution: Fixed so that axiUm prevents you from defining procedure codes that make no sense (e.g. surface extractions). Now when the Type drop-down field displays the Extraction option, axiUm disables the Surf. Number field.

101779 - Problem with procedure code group switching
Module: EHR - Chart Add tab
Problem: When you select a single-surface procedure code, enter one surface, add the treatment record, and then edit this treatment record by selecting additional surfaces, axiUm does not switch procedure groups.

This works fine if the Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - Procedure Code window - Graphic Detail section displays the following:
- Type: Illustrated
- Zone: Surfaces on Crown

**Solution:** Fixed. Now procedure code group switching works for procedure codes that use
- Type: Text
- Zone: NA

---

**101868 - Cannot add conditions**

**Module:** EHR - Chart Add tab

**Problem:** axiUm has lost the ability to add conditions. If you try adding a condition, axiUm displays the message, "Cannot find the procedure with 0 surface(s) for the site entered. One or more of the treatments will not be added".

**Solution:** Fixed so that you can add conditions again.

---

**101923 - Text is cut off**

**Module:** EHR - Forms tab

**Problem:** Two problems:
- In the EHR module, sometimes the text is cut off in the Additional Info window.
- In the Maintenance module, the Form Item - Additional Info window’s Text field is cut off.

**Solution:** Fixed both problems:
- If text is too long, you can either use the tooltip or click (ellipsis) to show the entire text.
- The Text field displays the full text.

---

**101925 - Scroll bar problem**

**Module:** EHR - Tx History tab

**Problem:** This applies to patients with more than one page of treatment records. When you move the bottom (horizontal) scroll bar to the right and double-click on a treatment record, and then click the OK button on the window, axiUm returns the scroll bar to the left (while the view remains on the right).

**Solution:** Fixed.

---

**102048 - Adding maximum note length results in error & crash**

**Module:** EHR ~ General Note window, Template Note window, SOAP Note window
Problem: Two problems:

- When you enter a note using the maximum number of characters allowed, axiUm displays the error message, “Changes will be lost. Are you sure you want to continue?” This message should not display.
- When you save this note and then open to view it, axiUm crashes.

Solution: Fixed so that in the above scenario, axiUm does not display the error message, and axiUm no longer crashes when you view the note.

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102078 - List view not sorted

Module: EHR ~ Add Patient Medical Alerts window

Problem: The Add Patient Medical Alerts window (in EHR module - Alerts tab - highlight an alert item - right-click - Update Medical Alerts option), the items in the list view are not sorted in alphabetical order.

Solution: Fixed to sort the items in the list view in alphabetical order.

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General

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101401 - MESSAGE_PKG recipient strings

Module: Database

Problem: The MESSAGE_PKG.ADD_RECIPIENT_STRING causes recipient names to display differently from the Messenger module.

Solution: Fixed.

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101475 - Duplicate messages

Module: Login

Problem: When the following conditions are met:
- You are using Active Directory.
- In Maintenance module - System tab - Station Options icon - Station Options window - General section - Office section, the StationExitMethod item is set to 1 = Log Off.
- axiUm is left running overnight.

axiUm repeatedly displays a message indicating that the workstation's date does not match the server's date.

Solution: Fixed so that axiUm displays and closes the error message only once, then closes the application.
101698 - Log-off problem

Module: Login

Problem: If you have the following setup in Maintenance module - System tab - Desktop icon - Desktop Settings window:
- Exit Method: Log Off
- Auto Close Log On (in mins.): any value (e.g. 1)

If you leave axiUm running overnight, the next day you will see the error message, “The workstation date is not the same as the server date!” When you click the OK button, axiUm displays the User Log On window, and when you try logging on, it displays the same error message behind it.

Solution: Fixed so that in the above scenario, if the Exit Method drop-down field displays the Log Off option, axiUm still displays the error message but ignores the log-off option you selected and closes the application instead.

101699 - axiUm minimizes

Module: Login

Problem: In some cases, when you select the Tools menu - Switch User option - Switch User window, and you enter the current logged-on user's information, axiUm minimizes. This may mislead users to think that axiUm exited, but it has not.

Solution: Fixed so that in the above scenario, axiUm no longer minimizes.

101883 - Change Password window colors

Module: Change Password

Problem: When you go to Tools menu - Change Password option - Change Password window, the enabled fields appear grey (looks disabled) and the color of the surrounding area is slightly off.

Solution: Fixed.
101721 - Encryption warning

**Module:** Maintenance ~ System Options window

**Problem:** When you go to Maintenance module - System tab - System Options icon - System Options window - System Options section, and select the Use Advanced Encryption checkbox, axiUm displays the following warning:

"Changing the password encryption will convert all passwords to the new encryption method. This process could take some time to complete. Once the passwords are converted they cannot be converted back. Are you sure you want to continue?"

Because using advanced encryption also prevents you from using MiPACS, this must also be included in the warning message.

**Solution:** The warning message has been changed to:

"Checking 'Use Advanced Encryption' will convert all passwords to use the new encryption method. This process could take some time to complete.

WARNING:
- Once the passwords are converted they cannot be converted back.
- Using Advanced Encryption will prevent the use of MiPACS imaging software.

Are you sure you want to continue?"

102218 - Make claim adjustment reason codes optional

**Module:** Maintenance ~ Claim Adjustment Reason Codes window

**Problem:** Changes in axiUm to accommodate 835 remittance processing now makes the claim adjustment reason code’s group code optional (in Maintenance module - Insurance tab - Claim Adjustment Reason Codes icon - Claim Adjustment Reason Codes window).

**Solution:** Fixed so that in the Claim Adjustment Reason Codes window, the Group Code drop-down field can be blank.

When you receive the physical EOB from the insurance company and you manually enter this in the Explanation of Benefits (EOB) window, selecting a claim adjustment reason code forces you to also select a group code at that time. axiUm then uses this group code in the 835 response.

Patient Card

101865 - Patient Insurance History window is blank

**Module:** Patient Card
Problem: This applies only to the Dutch version. When you go to Patient Info window - Insurance tab - (Show History) - Patient Insurance History window, the contents are blank.
Solution: Fixed to display the contents.

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**Rolodex**

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**101436 - Not selecting patient**

Module: Rolodex

**Problem:** When you select a patient by going to Patient menu - Select Patient option - Rolodex (Select Patient) window, the Rolodex module does not acknowledge that you selected a new patient. Then when you open a different module (e.g. Transactions), it uses the incorrect patient.

This works fine if you select the Add to Selected Patient List checkbox in the Rolodex (Select Patient) window.

**Solution:** Fixed.

---

**101685 - Mobile phone number not displaying area code**

Module: Patient Card

**Problem:** If you have the Rolodex module set up to display mobile phone numbers in the patient list (in Rolodex module - (Options/Setting) - Patient Options window - Rolodex section, the Optional Display Field displays the Mobile Phone option), the search results do not display the area code.

**Solution:** Fixed.

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**Scheduler**

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**101410 - Problems searching & selecting instructor**

Module: Scheduler ~ Appointment Expert window

**Problem:** When you go to Appointment Expert window - Instructor field - Users List, and highlight multiple records, and then unhighlight one of those records, when you close the Users List window and return to the Appointment Expert window, the Instructor field is blank.

**Solution:** Fixed so that in the above scenario, the instructor names appear in the Instructor field. Also improved the Instructor field to display all instructor names more clearly.
101424 - Cannot search with no provider

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you search in the Appointment Expert window using a blank Provider field and also a blank 2nd Provider field, clicking the Search button displays the message, "The first and second providers are the same. Please edit the appointment and change one of the providers before proceeding."

**Solution:** Fixed so that in the above scenario, axiUm displays no error messages.

---

101429 - Instructor field not populating

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In the Faculty Assignments window (in Rolodex module - patient selection list - right-click - Faculty Assignments option), if you assign a primary faculty to a patient and also indicate a discipline, and then in the Appointment Expert window you search for an appointment using this patient-discipline combination, axiUm does not automatically display the associated primary faculty in the Provider field.

**Solution:** Fixed so that in the above scenario, axiUm displays the primary faculty.

---

101939 - Searching available chairs with hygiene appointment

**Module:** Scheduler - Chair tab

**Problem:** If a hygiene appointment requires an exam, the Appointment Expert window's search results include time blocks that exceed clinic hours.

**Solution:** Fixed.

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**Transactions**

98471 - TRX InsStatus fields are set incorrectly

**Module:** Transactions - Ins Pmt tab

**Problem:** If you are using reserve funds, and you either reverse or adjust an insurance payment, axiUm is not setting an internal flag that indicates that the reserve funds were checked in the overnight process. This causes the overnight package to run slower because it checks these records again to set the flag. This was only a speed issue; the integrity of the transactions is unaffected.

**Solution:** Fixed.

---

101363 - Inconsistent NM1*82 field length in 4010

**Module:** Transactions ~ EDI Claims window
**Problem:** For both medical and dental claims, the rendering provider field (NM1*82) prints up to 30 characters. This is inconsistent with other name fields (e.g., NM1*85, NM1*PR) that prints up to 35 characters. This is only a field length inconsistency and does not cause claim rejections.

**Solution:** Now NM1*82 (rendering provider) allows up to 35 characters.

---

101405 - Incorrect applied & held amounts

**Module:** Transactions - Ins Pmt tab

**Problem:** When you refund an insurance payment, delete this insurance refund record, and then adjust the insurance payment amount, axiUm displays the incorrect amounts in the Applied column and the Held column.

**Solution:** Fixed.

---

101679 - Problems unallocating insurance payments

**Module:** Transactions - Ins Pmt tab

**Problem:** This occurs for patients with multiple insurance companies. When axiUm bills a treatment to multiple insurance companies, and you apply insurance payments received from all of them, and then you unallocate one of those insurance payments, axiUm displays the message, “Unallocating the Adjudication Reversal will result in over allocation of the insurance payment.”

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message.
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EHR

102201 - Text on buttons are too small

Module: EHR ~ View Chart History window

Problem: In the View Chart History window (in EHR module - (Show History) - Chart History Settings window - OK button), the text on the buttons are too small.

Solution: Fixed to display using standard axiUm font sizes.

102258 - Diagnosis not saved when changing Planned to In-Process

Module: EHR ~ Tx History tab

Problem: When you select multiple planned treatment records (containing no diagnosis), and you change these planned treatment records to in-process status (selecting a diagnosis at this time), axiUm does not save the diagnosis. Repeating these steps a second time correctly saves the diagnosis.

Solution: Fixed so that in the above scenario, axiUm saves the diagnosis.

102420 - Changing number of surfaces selects incorrect procedure

Module: EHR ~ Chart Add tab

Problem: Sometimes, when you change the number of surfaces on a treatment record, axiUm does not auto-switch to use the correct procedure code (it matches number of surfaces correctly but may choose a code with the wrong anterior/posterior location).

Solution: Fixed.
102582 - Allows entry of procedures as findings

Module: EHR - Chart Add tab

Problem: When a procedure code is entered as a finding instead of a treatment, and that procedure is part of a group, axiUm does not validate the anterior/posterior location. For example, in the Details tab’s Code field, enter the procedure code D2330 (an anterior procedure, and its group code contains no matching posterior procedure), and in the Site field enter 17 (a posterior tooth). Then when you click  (Add Finding), axiUm adds the procedure.

Solution: Fixed so that in the above scenario, axiUm prevents you from adding the procedure as a finding.

102641 - Treatment Plan Letters not displaying all information

Module: EHR - Tx Plan tab

Problem: If you go to the Tx Plan tab’s Problems tab, and delete the Plan Description field, when you print the Treatment Plan Letters (e.g. Patient Letter, Physician Letter, Insurance Letter, or Other Letter), axiUm hides the following information:

- patient name
- patient address
- practice name
- practice address

For example, the Patient Letter looks like this:

```
Dear,

The attached estimate indicates planned treatments and their associated costs. The final amounts may deviate by as much as 10% from what is indicated on the estimate. In the unexpected event that the estimated costs exceed more than 10%, a new estimate will be presented.
```

Solution: Fixed so that in the above scenario, all Treatment Plan Letters display this information.
104230 - Phone number extension is cut off

**Module:** EHR - Prescriptions tab

**Problem:** In the following setup:

- A patient record (in Patient Info window - Personal tab - Telephone section and Contact section) displays a work number with an extension number of up to six digits.
- Record indicates to use this work number as their primary contact method.

Then when you go to EHR module - Prescription tab and print a prescription, the extension number on the work phone number is cut off:
**Solution:** Fixed so that in the above scenario the full phone number including its extension number displays in the prescription printout.

---

**104278 - Edit Planned Appointment window not displaying**

**Module:** EHR - Tx History tab

**Problem:** When you right-click on a treatment record containing a planned appointment ( ), and select the View Appointment right-click option, axiUm displays the Patient Appointment window or the Family Appointment window. It should display the Edit Planned Appointment window.

**Solution:** Fixed so that in the above scenario, axiUm displays the Edit Planned Appointment window.

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**Evaluations**

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**102121 - Repetitive error message**

**Module:** Evaluations

**Problem:** Sometimes adding an evaluation causes axiUm to repeatedly display the same error message.

In the following setup:

1. Instructor is also a provider.
   
   In the Station Options window (in Maintenance module - System tab - Station Options icon), go to Evaluations section - Grading section - DefaultSelfEvalToProvider item, and in the Default field enter 1 = Default to Provider.

2. The default form is a self-evaluation form.
   
   In the Grading Forms window (in Maintenance module - Evaluations tab - Forms icon), select the following:
   
   - Form Type: Sessional
   - Evaluation: Yes or Yes - one copy of the form
   - Default Sessional: selected

Then when a provider (not the instructor) adds an evaluation, axiUm displays the message, “The user cannot add an evaluation for a different provider when the form requires a self evaluation!” This is fine. However, when you click the OK button, axiUm displays this message again. This repeats several times before axiUm stops displaying this message.

**Solution:** Fixed so that in the above scenario, axiUm displays the message only once. Also changed the message to make it more clear, “The user cannot add the default evaluation for a different provider when the form requires a self evaluation!”
General

97039 - Active Directory problem

Module: Authentication

Problem: The new log on/off enhancement (see item 52197 in the 5.0 Enhancements document) does not consider Active Directory.

Solution: Fixed. The following new rules apply for Active Directory:

IF you are using Active Directory:
1. Go to Maintenance module - System tab - Station Options icon - Station Options window.
2. Go to General section - Office section - ActiveDir item.
3. Select one of the options1 through 6.

AND you do the following:

Go to the Desktop Settings window's Exit Method drop-down field, select the Log Off option, and click the Accept button.

You exit axiUm by doing one of the following:

- Go to the Actions menu and select the Exit option and click Yes.
- Go to the application main screen and click (close).
- Go to the Windows Log On and click the Close button.

THEN axiUm does the following:

axiUm displays a warning "Warning! Active Directory does not support Log off as an Exit Method".

axiUm closes, regardless of the exit setup in the Desktop Settings window.

Also, if the Desktop Settings window's Exit Method drop-down field displays Log Off method, the User Log On window hides the Exit button (this had no functionality in this case).

102271 - Prompts for non-existent station registration key

Module: Authentication
**Problem:** When you start axiUm, it prompts you for the station registration key even if there is none set up.

This occurs if you are using advanced encryption (in the Maintenance module - System tab - System Options icon - System Options window - System Options section, the Use Advanced Encryption checkbox is selected).

Then in the following scenario:

1. Go to the Maintenance module - System tab - System Options icon - System Options window - Terminal Type section, and make sure the New Station Registration Key field is blank.
2. Go to the Maintenance module - System tab - Stations icon - Station Codes window, and delete the station record for the station that you are using.
3. Close and reopen axiUm.
   
   axiUm prompts you for the station registration key (although it is blank). You can click OK and continue working.

**Solution:** Fixed so that in the above scenario, axiUm no longer prompts you for the station registration key.

---

**Info Manager**

**99127 - A/R report calculating adjustments incorrectly**

**Module:** Info Manager - Practice tab

**Problem:** In the Transactions module, if you enter an adjustment for a past date, modify it to the current date, and then modify it to a past date beyond the original date, axiUm does not correctly detect the date of the adjustment, causing the A/R Reconciliation report to become off-balance.

**Solution:** Fixed.

---

**104295 - Date condition on Contact Notes report causes SQL error**

**Module:** Info Manager - Patients tab

**Problem:** Sometimes, depending on the Windows date format used on your workstation, setting a date condition on the Contact Notes report causes an SQL error.

To replicate this bug:

1. From the Info Manager module’s Patient tab, select the Contact Notes category.
2. Click on the column heading Cont.Note Modified Date. axiUm displays the Column Conditions window.
3. Enter the fields and options. For our example, we will enter the following:
• Operator: Equal to
• Current date: selected
• [drop-down field] __ [drop-down field]: Minus 1 Days

4. Click the Add button to save this condition and add it to the list view.

![Column Conditions dialog box]

5. Click the Close button to close the Column Conditions window and return to the Info Manager window.
6. Click the Search button.

axiUm displays an SQL error.

**Solution:** Now you can select any Windows date format on your workstation, and when you follow the above scenario, axiUm no longer displays an SQL error.

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# Maintenance

## 101366 - Required Fields Definitions window is missing fields

**Module:** Maintenance ~ Required Field Definitions window

**Problem:** Some fields that exist in the Patient Info window are missing from the Required Field Definitions window, preventing you from making these patient fields required.

To view these missing fields:

1. Go to the Required Fields window (in Maintenance module - Basic tab - Required Fields icon).
2. From the Type drop-down field, select the Patient option.
3. Click ![info icon] (Required Field Definitions).

axiUm displays the Required Field Definitions window. The following items are missing from the list view:

- Account
• Open Date

These fields exist on Patient Info window - Personal tab - Status section, and need the option to make them mandatory for entry.

![Status screenshot](image)

**Solution:** Now the Required Field Definitions window's list view includes the Account option and the Open Date option. You can now make these fields mandatory for entry in the Patient Info window's Personal tab's Status section.

---

101942 - Display behavior using XP themes

**Module:** Maintenance ~ EDI Claims window

**Problem:** This applies to Dutch version only. If you are using Windows XP themes, the EDI Claim window (in Maintenance module - System tab - Processes icon - Processes window - EDI Claims button) does not use standard axiUm display format.

**Solution:** Fixed to use standard axiUm display format.

---

102161 - Maintenance icons not opening windows correctly

**Module:** Maintenance ~ Survey Names window, Survey Setup window

**Problem:** Some of the Maintenance icons do not open the associated windows. Go to Maintenance module - Patient tab. There are two problems:

- Click on the Survey Names icon. axiUm displays the Survey Setup window. axiUm should open the Survey Names window.
- Click on Survey Setup icon. Nothing opens. This should open the Survey Setup window.

**Solution:** Fixed both problems.

---

102692 - Reword warning message

**Module:** Maintenance ~ System Options window

**Problem:** When axiUm displays the Remittance Partial Processing Warning window, it displays the message, "Stopping processing of remittances will leave the records as partially processed. Are you sure you want to continue?" Need to change this message to make it clearer.
**Solution:** Changed the message to display, “Records will not be fully processed if Processing of Remittances is stopped before completion. Processing can be resumed later. Are you sure you want to continue?”

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### 102702 - Payment Code window displays unnecessary records

**Module:** Maintenance ~ System Options window

**Problem:** Go to Maintenance module - System tab - System Options icon - System Options window - EDI Remittance section, click on the Payment Code (ellipsis) to display the Payment Code window. axiUm lists all payment codes available.

**Solution:** Fixed to display only insurance type payment codes. These are payment codes with the From drop-down field displaying the Insurance option.

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### 102714 - Misspelled field name

**Module:** Maintenance ~ System Options window

**Problem:** Go to the System Options window (in Maintenance module - System tab - System Options icon), then go to the EDI Remittances section. There is a field called Direct Deposit (ETF Code). This field should be named Direct Deposit (EFT Code).

**Solution:** Renamed the field to display Direct Deposit (EFT Code). The EFT refers to Electronic Fund Transfer.

---

### 103883 - Field should be disabled

**Module:** Maintenance ~ Fee Schedule Definitions window

**Problem:** In the Fee Schedule Definitions window (in Maintenance module - Clinical tab - Fee Schedule Codes icon - Fee Schedule Codes window - (Fee Schedule Definitions)), there is a Code field. It appears enabled, and you can enter a different value. When you click (Modify Record) axiUm appears to save the changes. But when you close and reopen this window, the Code field is reset to the original value. This field is read-only and should be grayed out.

**Solution:** Fixed so that the field is disabled (grayed out).

---

### 104275 - Claim Status Codes window crashes axiUm

**Module:** Maintenance ~ Claim Status Codes window

**Problem:** In the Claim Status codes window (in Maintenance module - Insurance tab - Claim Status Codes icon), axiUm crashes when you do one of the following:

- Click (Clear Data), then enter the Code field and Description field, and click (Add a new Record).
- From the list view, select a record, change the Description field, and click (Modify Record).
Solution: Fixed so that in the above scenarios, axiUm no longer crashes.

104297 - 835 remittance validation
Module: Maintenance ~ EDI Claims window
Problem: axiUm validates remittance files to ensure it is associated to organizations such as Emdeon, MDE, or NYMed. Need axiUm to allow other insurance companies (e.g. Kentucky Medicaid) to send the file directly to your institution.
Solution: Fixed.

Patient Assignments

102206 - Display behavior using XP themes
Module: Patient Assignments ~ Patient Plan Details window
Problem: If you are using Windows XP themes, the Patient Plan Details window (in Patient Assignments module - Details option - run a search - highlight a record - Details button) displays a white border around the list box. This is not a standard axiUm display format.
Solution: Fixed to use standard axiUm display format.

Patient Card

102165 - Physicians window displays blank or incorrect patient
Module: Patient Card ~ Patient Info window
Problem: Sometimes, when you create a new patient record and add a physician record to it, axiUm adds this physician record to the previously selected patient's record.

To replicate this bug:

1. From the Rolodex module, click (Add Patient).
   axiUm displays the Patient Info - Add Patient window.
2. Go to the Personal tab and enter all required fields.
   Note: Do not click the Save button.
3. Go to the Clinical tab's Patient Physician section, and click (ellipses) to display the Patient Physicians window.
Then in the Patient field, one of the following occurs:

- If you previously selected a patient record, the field displays the previously selected patient’s name (should display the current patient). Then when you save the patient record, axiUm adds the physician record to the previously selected patient record, not the current one.
- If you previously selected no patient record, the field displays blank (should display the current patient). When you save the patient record, axiUm adds the physician record to the current patient record (this is fine).

**Solution:** Fixed so that axiUm forces you to save the new patient record before adding a physician record. Doing so adds the new patient to the axiUm database, and properly displays this patient’s name in the Patient field of the Patient Physicians window.

---

**102263 - Patient Information report not displaying properly**

*Module:* Patient Card

*Problem:* When you go to the Patient Card and click (Print Patient Info), the text “Mobile Phone” is displayed next to the patient’s name.

*Solution:* Fixed so that the “Mobile Phone” label is no longer displayed next to the patient’s name.

---

**102264 - Problems printing when physician notes too long**

*Module:* Patient Card

*Problem:* Long notes in a physician’s record causes print problems when the print job includes physician information.

For example:

1. Go to the Physician window
   
   Go to Maintenance module - Patient tab - Physician List icon - Physicians List window - run a search - highlight a record from the list view - (Edit Record).

2. In the Comment text box, enter a long comment (about 12 lines).

3. Click the OK button
   
   axiUm saves the changes, closes the Physician window, and returns to the Physicians List window.

4. Click (close).
   
   axiUm closes the Physicians List window and return to the Maintenance module.

5. Open the Patient Card window.

6. Click (Print Patient Info).
   
   axiUm displays an error message.
**Solution:** Fixed so that long comments in a physician’s record does not interfere with printing.

---

**Scheduler**

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**101616 - Minimum notice miscalculation**

**Module:** Scheduler

**Problem:** In some cases, when you set up a minimum notice for appointments (e.g. 24 hours), and enter an appointment that provides enough notice (e.g. 7 days), but in a clinic where the session starts on a future date, axiUm displays a message indicating that this is insufficient notice for the appointment date and time entered.

**Solution:** Fixed.

---

**102453 - Appointment Form report cuts off text**

**Module:** Scheduler ~ Appointment Form report

**Problem:** When you print the Appointment Form report, axiUm cuts off some of the information.

To replicate this bug:

1. Go to the Scheduler module’s Active tab.
2. Right-click on a patient appointment and select the Print Appt Form option.
   
   axiUm displays the Print Appointment Options window.
3. Select the Clinical Appointment Form option.
4. Click the OK button.

   The first words in the following sections are cut off:
   
   - Patient
   - Chart #
   - Last Visit

**Solution:** Fixed so that all the information in the Appointment Form report displays.

---

**102628 - Cannot undo cancel or fail**

**Module:** Scheduler ~ Appointment Lists window
**Problem:** Sometimes, if the original appointment was booked using Chair method, and you try reversing the cancelled or failed appointment in the Appointment Lists window using Book method, axiUm does not reverse the record.

**Solution:** Fixed.

---

### 104272 - Appointment Expert ignores break time rules

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In some cases, the Appointment Expert window ignores the Appointment Scheduling Rules (Expert Settings) window’s Break Times checkbox. When you select this checkbox, and you search for available time blocks for a selected planned appointment, axiUm ignores the provider’s break time rule (as indicated in the Provider Schedule Detail window’s Break Rule drop-down field).

**Solution:** Fixed. Now in the above scenario, axiUm considers the selected provider’s break time rule.

---

### Transactions

---

### 102267 - Display behavior using XP themes

**Module:** Transactions ~ Applying Adjustment window

**Problem:** In the Applying Adjustment window (in Transactions module - Adjustment tab - highlight record from list view - Apply button), the border around the Remaining field is cut off.

**Solution:** Fixed.

---

### 102290 - Cannot delete EOB records

**Module:** Transactions ~ Explanation of Benefits (EOB) Details window

**Problem:** When you delete an EOB record from the Explanation of Benefits (EOB) Details window, it reappears the next time you open the window.

To replicate this bug:

1. Open the Explanation of Benefits (EOB) Details window (e.g. from the Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option).

2. From the list view, highlight an EOB record and click ⚤ (Delete Record).
   
   axiUm removes the item from the list view.

3. Close and reopen the Explanation of Benefits (EOB) Details window.

   The record you deleted reappears in the list view.
5.0 Bug Fixes

Solution: Fixed so that deleted EOB records no longer reappear in the Explanation of Benefits (EOB) Details window.

102291 - Allows manual entry of inactive codes

Module: Transactions ~ Explanation of Benefits (EOB) Details window

Problem: axiUm allows you to manually enter inactive claim adjustment reason codes.

To replicate this bug:

1. Open the Explanation of Benefits (EOB) Details window (e.g. from the Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option).
2. In the Code field, manually enter an inactive claim adjustment reason code.
   Note: Do not click (ellipsis).
3. Click (Add a new Record).
   axiUm adds the new EOB record to the list view using an inactive claim adjustment reason code.

Solution: Fixed. Now in the above scenario, axiUm displays the message, "Invalid Reason Code".

Note: Even if you click on the Code field (ellipsis) and select an inactive claim adjustment reason code from a list, axiUm still lets you add this code to the EOB record. This was fixed in 102518.

102292 - Code field not defaulting to uppercase

Module: Transactions ~ Explanation of Benefits (EOB) Details window

Problem: It is standard throughout axiUm to automatically use uppercase when manually entering code fields. However, the Explanation of Benefits (EOB) Details window's Code field uses lowercase. This results in an invalid code entry.

To replicate this bug:

1. Go to the Claim Adjustment Reason Codes window (in Maintenance module - Insurance tab - Claim Adjustment Reason Codes icon).
2. Create a claim adjustment reason code using alpha values (e.g. ABC).
3. Open the Explanation of Benefits (EOB) Details window (e.g. from the Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option).
4. In the Code field, enter the alpha-value claim adjustment reason code (i.e. abc).
axiUm displays this entry using lowercase.

5. Click (Add a new Record).

Because the code uses lowercase, axiUm cannot identify it, and displays a message indicating that the reason code you entered is invalid.

Solution: Fixed to default this field entry to uppercase.

102314 - Completing multiple treatments not submitting to insurance

Module: Transactions - Treatment tab

Problem: When you select multiple treatment records with different treatment status, and you change them all to Completed status, axiUm does not always submit them all to the insurance company. This causes lost treatment records and you must run reports to identify them, and then manually correct these records by rebilling.

Solution: Fixed so that in the above scenario, axiUm batches all completed treatments.

102495 - Transaction notes display incorrect dates

Module: Transactions - Notes tab

Problem: Sometimes when you enter a note, axiUm adds the record using an incorrect date.

To replicate this bug:

1. From the Rolodex module, select patient1. Make sure the patient record contains Transactions notes with a date in the past.
2. In the Transactions module’s Notes tab, highlight one of the note records.
3. While leaving the Transactions module open, go to the Rolodex module and select patient2.
4. Go to the Transactions module’s Notes tab (you are now looking at patient2).
5. In the Text field, enter a note for patient2.
   Make sure you leave the Date field blank.
6. Click the Add button.

   axiUm adds the note to patient2’s record but uses the date from the highlighted note in patient1’s record (the one you highlighted in step 2).

Solution: Fixed. Now in the above scenario, axiUm displays an error message indicating that you must specify a date before adding a new message.
102518 - Allows selection of inactive codes

Module: Transactions ~ Explanation of Benefits (EOB) Details window

Problem: axiUm displays inactive claim adjustment reason codes in the Explanation of Benefits (EOB) Details window. These codes should be unavailable for selection.

To replicate this bug:

2. Make an item inactive.
3. Open the Explanation of Benefits (EOB) Details window (e.g. from the Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option).
4. Go to the Claim Adjustment Reasons section, go to the Code field and click (ellipsis) to display the Claim Adjustment Reason Codes window.

The list view displays inactive items, and these items can be selected and used.

Solution: Fixed so that in the above scenario, inactive claim adjustment reason codes are no longer displayed.

Note: Even if you manually enter the inactive claim adjustment reason code in the Code field, axiUm still lets you add this code to the EOB record. This was fixed in 102291.

104131 - Unable to allocate pre-payments

Module: Transactions ~ Pre-payment Allocation window

Problem: In the Pre-payment Allocation window (in Transactions module - Payment tab - Allocate button - Applying Payment window - Prepay button), make sure that the Apply field is the same as Payment field, and click the OK button. In some cases, axiUm displays a message indicating that the applied amount exceeds the held amount.

Solution: Fixed. Now in the above scenario, axiUm no longer displays this message.

104240 - Drop-down field shown when only 1 item to display

Module: Transactions ~ Explanation of Benefits (EOB) Details window

Problem: In the Explanation of Benefits (EOB) Details window (e.g. in Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option), EOB drop-down field is always shown. axiUm should show this only if there is more than one EOB record.

Solution: Fixed so that the EOB drop-down field is shown on the Explanation of Benefits (EOB) window only if more than one EOB exists on file.
104241 - Enabling of the New EOB button

**Module:** Transactions ~ Explanation of Benefits (EOB) Details window

**Problem:** In the Explanation of Benefits (EOB) Details window (in Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option), need axiUm to enable the New EOB button only if you have already entered the EOB information for this treatment record.

**Solution:** Now axiUm enables the New EOB button only if an EOB file exists; otherwise it is disabled.

The New EOB button was previously called the Split EOB button (see 104244).

104242 - Unnecessary message display

**Module:** Transactions ~ Explanation of Benefits (EOB) Details window

**Problem:** Making changes to the fields in the Explanation of Benefits (EOB) Details window displays an unnecessary confirmation message

To replicate this bug:

1. Go to the Explanation of Benefits (EOB) Details window.
   Go to Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option.

2. In the Claim Information section, make changes to the fields. For our example, we will do the following:
   - EOB#: Enter a value
   - Adjudication: Change the date

3. Click (close). axiUm displays a confirmation message

   ![Confirmation Message](image)

   This message is unnecessary. When you click (close), axiUm automatically saves any entries or changes you made in the Claim Information section. On the other hand, the Claim Adjustment Reasons section requires you to manually save entries made in this section, and a toolbar is provided for this purpose.
**Solution:** Warning no longer displays.

---

### 104243 - Not saving the EOB Number field

**Module:** Transactions ~ Explanation of Benefits (EOB) Details window

**Problem:** axiUm is not saving the Explanation of Benefits (EOB) Details window's EOB Number field.

In the following scenario:

1. Go to the Explanation of Benefits (EOB) Details window.
   
   Go to Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option.

2. In the EOB Number field, enter an EOB number.

3. Go to the Claim Adjustment Reasons section, and in the Code field, add a claim adjustment reason code.

4. Close and reopen the window.
   
   The EOB Number field is blank.

**Solution:** Fixed so that in the above scenario, the EOB Number field retains the value you entered.

---

### 104244 - Split EOB button name

**Module:** Transactions ~ Explanation of Benefits (EOB) Details window

**Problem:** In the Explanation of Benefits (EOB) Details window (in Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option), the Split EOB button needs to be renamed. The current name implies that you are using the same EOB number to create a new one, which you can, but this button also lets you create a new record with a new EOB number.

**Solution:** The Split EOB button is now called the New EOB button (changed).

Also, axiUm enables and disables the New EOB button only when an EOB file exists (see 104241).

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**X-Ray**

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### 101304 - Compatibility with Emago 6

**Module:** X-Ray
**Problem:** Need axiUrn to be compatible Emago 6 once it becomes available.
**Solution:** Fixed to ensure axiUrn is compatible with the future Emago 6 release.
axiUm Release 5.00.04

Dispensary

104642 - Incorrect number of sundries requested

<table>
<thead>
<tr>
<th>Module: Dispensary - Requests tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem: axiUm ignores procedure requirement rules on sundry items.</td>
</tr>
</tbody>
</table>

Setup:

1. Open the Procedure Requirements window.
   Go to Maintenance module - Dispensary tab - Procedure Requirements icon - Procedure Requirements List window - (Create a new Record).
2. In the Procedure From and the Procedure To fields, enter a procedure range.
3. In the Item Type drop-down field, select Sundry.
4. In the Item field, select an item.
5. In the Required per drop-down field, select Appointment.
6. Click the OK button. axiUm saves the record and closes the Procedure Requirements window.

Then when you book an appointment containing multiple procedures that fall within this procedure range, axiUm should dispense this sundry item only once (because the procedures fall under a single appointment). However, axiUm dispenses the item per procedure, creating multiple requests for the same sundry item.

Solution: Fixed so that in the above scenario, axiUm dispenses the sundry item once per appointment.

---

EHR

104273 - Physician letter error message needs rewording

<table>
<thead>
<tr>
<th>Module: EHR ~ Physician letter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem: If a patient record contains no primary physicians (e.g. it contains multiple physicians but no primary), and you try printing a Physician letter (in EHR module - Tx Plan tab - Patient Acceptance tab - Letters button - Treatment Plan Letters window - Physician Letter checkbox - OK button), axiUm displays a message indicating that this patient does not have an assigned physician.</td>
</tr>
</tbody>
</table>
This message was fine in previous versions of axiUm (before 5.0) where patient records were limited to one physician (so by default the only physician automatically became the primary one). Now you can assign multiple physicians (see 5.0 Enhancement document, item 45342), and you are not required to assign one as primary. However, axiUm requires the patient record to have a primary physician for printing Physician letters.

**Solution:** Changed the message to display, “The patient does not have a primary physician.”

---

**104859 - Form questions allow cursor in hidden/disabled fields**

**Module:** EHR - Forms tab

**Problem:** Sometimes, when answering an Additional Info type question, you can press the Tab key to move the cursor into hidden and disabled fields.

**Solution:** Fixed so that pressing the Tab key moves the cursor into active fields and controls only.

---

**105076 - Adding student evaluation causes crash**

**Module:** EHR - Tx History tab

**Problem:** Sometimes, when you select the Add Student Eval right-click option, axiUm crashes.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.

---

**105360 - Default evaluation based on swipe card discipline**

**Module:** EHR - Tx History tab

**Problem:** When an evaluation is created for a treatment from the right-click menu of the EHR's Treatment History page, it does not select the evaluation form based on the swipe card's discipline.

**Solution:** The form specified in the setup is selected by default.

---

**105545 - Searching diagnosis code causes crash**

**Module:** EHR - Chart Add tab, Tx Plan tab
Problem: When you search for diagnosis codes where the search string is longer than 15 characters, axiUm crashes.

Steps to reproduce in the Chart Add tab:
1. Click on Chart Add tab - Diagnosis tab - Search tab.
2. From the On drop-down field, select the Description option.
3. In the Criteria field, enter a search criterion longer than 15 characters.
4. Click the Search button.
   axiUm crashes.

Steps to reproduce in the Tx Plan tab:
1. Click on Tx Plan tab - Diagnosis tab.
2. Click the Update button to display the Select Clinical Diagnosis Code window.
3. Click on the Search tab.
4. In the Criteria field, enter a search criterion longer than 15 characters.
5. Click the Search button.
   axiUm crashes.

Solution: Fixed so that in both scenarios, axiUm no longer crashes.

---

General

104505 - Overnight procedure calculating incorrect time
Module: Database
Problem: When you run an overnight procedure to check out appointments (PROCEDURE CHECKOUT_APPTS), axiUm does not consider the time zone, causing appointment history records to display incorrect checkout times.
Solution: Fixed to consider time zone.

105032 - Convert SQL to use Bind Variables
Module: Speed
Problem: Some SQL statements contain literals, which increases processing time on the Oracle server.
Solution: These literals are now translated to use Bind Variables to reduce processing time.
Info Manager

104354 - SQL error

Module: Info Manager - Appointment tab

Problem: axiUm displays an SQL error when you run either the Appointments report or the Appointment Procedures report, and these reports include fields from the X-Rays Planned for Recall file.

To replicate this bug:
1. From the Info Manager window, click the Appointment tab.
2. Select one of the following categories:
   - Appointments
   - Appointment Procedures
3. From the list view, right-click to display a list of options.
4. Select Edit Report. axiUm displays the Report Definition window.
5. From the Files list box, select X-Rays Planned for Recall option.
6. From the Fields list box, select any of the options (e.g. X-Ray Bitewing on Right Molar).
7. Click the OK button. axiUm saves the changes, closes the Report Definition window, and returns to the Info Manager window.
8. Click the Search button. axiUm displays an SQL error message.

Solution: Fixed so that in the above scenario, axiUm no longer displays the SQL error message.

104407 - Missing horizontal scroll bar

Module: Info Manager ~ Report Definition window

Problem: Sometimes, depending on your workstation’s operating system, the scroll bar is missing from the Report Definition window.

To replicate this bug:
1. From the Info Manager window, click the any tab (e.g. Appointment).
2. Select any category (e.g. Appointments).
3. From the list view, right-click to display a list of options.
4. Select Edit Report. axiUm displays the Report Definition window.
5. From the Files list box, select any option (e.g. X-Rays Planned for Recall option).
6. From the Fields list box, select enough options until a horizontal scrollbar is required to view all items.
   axiUm does not display a horizontal scroll bar.
Solution: Now in the above scenario, axiUm displays a scroll bar.

---

**Maintenance**

104289 - Provider Level Adjustments window needs rewording

**Module:** Maintenance ~ Provider Level Adjustments window

**Problem:** In the Provider Level Adjustments window (in Maintenance module - Insurance tab - Provider Level Adjustments icon), the wording in the description’s example is unclear. Currently it displays, “For example: If the insurance payment has additional funds due to interest that was earned, this must be removed from the A/R with a debit adjustment.”

**Solution:** Changed to display, “For example: If the insurance payment has additional funds for interest that is owed, this must be added to the A/R with a debit adjustment.”

---

104380 - Field not clearing previous entry

**Module:** Maintenance ~ Insurance Company window

**Problem:** In the Insurance Company window, if you select an overpayment process type and select an associated overpayment adjustment code, changing the overpayment process type does not clear the overpayment adjustment code.

To replicate this bug:

1. Go to the Insurance Company window (in Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List - run a search - (Edit Record)).
2. In the Over-pmt Process drop-down field, select an option (e.g. Transfer to pt option).
3. In the Over-pmt field, enter an adjustment code.
4. Go back to the Over-pmt Process drop-down field and select a different option (e.g. Write-up credit option).

   The Over-pmt field still displays the previous entry.

**Solution:** Now in the above scenario, axiUm clears the previous entry made in the Over-pmt field.

---

104495 - Cannot search physicians by type

**Module:** Maintenance ~ Physicians List window

**Problem:** You cannot search for physicians by type.

To replicate this bug:
1. Open the Physicians List window (in Maintenance module - Patient tab - Physician List icon).

2. In the Type drop-down field, select a physician type.

3. In the Criteria field, enter the first letters of the physician type selected.

4. Click on the Type column heading.

5. Click Search.
   
   axiUm displays no matching records.

**Solution:** Fixed so that in the above scenario, axiUm returns matching records.

---

**104664 - Medical Code Type window search method**

**Module:** Maintenance ~ Clinical Diagnosis Code window

**Problem:** When selecting codes from a window, it is standard to first select a search filter, then select from the filtered list. The Clinical Diagnosis Code window does not follow this process.

**Setup:**

1. Go to the System Options window (in Maintenance module - System tab - System Options icon).

2. Go to the System Options section, and from the **Diagnosis code type** drop-down field, select an option.
   
   For our example, we will select ICD-10.

3. Click the OK button.
   
   axiUm saves the changes and closes the System Options window.

**To replicate this bug:**

1. Go to the Clinical Diagnosis Code window (in Maintenance module - Clinical tab - Clinical Diagnosis Codes icon - Clinical Diagnosis List window - (Create a new Record)).

2. From the Medical Code Type drop-down field, enter the opposite type of diagnosis code from the setup.
   
   For our example, this will be ICD-9.

3. Click on the Medical Code (ellipsis) to display the Medical Diagnosis List window.
   
   axiUm lists only ICD-10 codes. This is fine. This is what we defined in the System Options window.

4. Select a code.

5. Click (close).
   
   axiUm closes the Medical Diagnosis List window and returns to the Clinical Diagnosis Code window.

   axiUm automatically changed the option displayed in the Medical Code Type drop-down field to ICD-10 to match the selected code.
The Medical Code Type drop-down field should default to the option set up in the System Options window.

**Solution:** Three changes:

- In the Clinical Diagnosis Code window, the Medical Code field and the Medical Code Type drop-down field have exchanged places. This forces you to see the code type before selecting the code.
- The Medical Code Type drop-down field is now a disabled field. The default option is defined in the System Options window.
- The Medical Diagnosis List window now displays only those codes that match the medical code type displayed in the Clinical Diagnosis Code window's Medical Code Type drop-down field.

---

**104665 - Display problems with Clinical Diagnosis Codes report**

**Module:** Maintenance ~ Clinical Diagnosis Codes report

**Problem:** There are two problems:

- The Tx Plan Diagnosis Codes report (in Maintenance module - Clinical tab - Clinical Diagnosis Codes icon - Clinical Diagnosis List window - (Print Report)) is misnamed. This should be called Diagnosis Codes report.
- In this report, axiUm does not display category names properly (i.e. no highlights with borders around category name), if that category contains no sub-category.

**Solution:** Fixed both problems.

---

**104740 - Station Groups report showing deleted stations**

**Module:** Maintenance ~ Station Groups report

**Problem:** Any deleted stations that were once associated to a station group are shown in the Station Groups report (in Maintenance module - System tab - Station Groups icon - Station Groups window - (Print Report)).

**Solution:** Deleted stations that were associated to station groups are now excluded from the Station Groups report.

---

**104776 - Drop-down field not displayed alphabetically**

**Module:** Maintenance ~ Physicians List window

**Problem:** In the Physicians List window (in Maintenance module - Patient tab - Physician List icon), the Type drop-down field is not displaying options alphabetically.

**Solution:** Now the Type drop-down field options are displayed alphabetically.
104998 - Confusing fields names
Module: Maintenance ~ System Options window
Problem: In the System Options window (in Maintenance module - System tab - System Options icon), if you go to the System Options section, there are two drop-down fields:

- Use diagnosis codes
- Diagnosis code type

These drop-down fields appear to work in conjunction with each other, but are in fact unrelated. Need to change the field names to avoid confusion.

Solution: Changed the drop-down field names to:

- Use Clinical Diagnosis Codes
- Medical Diagnosis Code Type

105391 - NY Medicaid claim files getting rejected
Module: Maintenance ~ EDI Claims window
Problem: For NY Medicaid insurance EDI claims (4010 and 5010 versions), the SBR09 segment contains the value 1, causing rejections. The SBR09 segment should contain the value MC.
Solution: Fixed.

105402 - Change option name
Module: Maintenance ~ System Options window
Problem: When you go to the System Options window (in Maintenance module - System tab - System Options icon), the EDI Remittances section displays the For Under Pmt drop-down field and the For Over Pmt drop-down field. Both of these drop-down fields display the Rebill Treatment option. The name of this option is misleading.
Solution: This is now called the Change Tx to Match option (changed).

105537 - Problems with clinical answer lists
Module: Maintenance ~ Clinical Note Answer Lists window
Problem: Go to the Clinical Note Answer Lists window (in Maintenance module - EHR tab - Clinical Note Answer Lists icon).

IF the Type drop-down field displays the Clinical Note option...

AND you do one of the following:
5.0 Bug Fixes

- Add a new record.
- Highlight an existing record from the list view.
- Delete a record.

axiUm displays a message indicating that the record has been deleted by another user. axiUm should not display this message.

Solution: Now in the above scenario, axiUm no longer displays the error message.

---

105681 - EDI claims not showing amount on individual treatment line

**Module:** Maintenance ~ EDI Claims window

**Problem:** NY Medicaid insurance EDI claims (X12N 4010 and 5010) were being populated with $0 amounts in the SV2 segments, with the CLM segment showing the total amount of the claim. The correct behaviour is:

- For insurance companies set to print customary totals on claims: The SV2 segments should contain the customary total amounts. The CLM segment should contain the sum of the customary total amounts.
- For insurance companies not set to print customary totals on claims: The first SV2 segment should contain the total amount of the claim, and subsequent SV2 segments should be populated with $0 amounts. The CLM segment should contain the total amount of the claim.

**Solution:** Fixed to populate the correct amounts in the SV2 and CLM segments.

---

107348 - NY Medicaid claims show incorrect date range

**Module:** Maintenance ~ EDI Claims window

**Problem:** axiUm is creating NY Medicaid EDI claims using the current date in the loop 2300 DTP03 field although the treatment dates have a different date. This causes NY Medicaid claims to be rejected.

**Solution:** Fixed.
104469 - axiUm auto-defaulting area code

Module: Patient Info window ~ Personal tab

Problem: In the Personal tab's Telephone section, if an area code already exists in the Home# field, and you update the Zip field, axiUm auto-updates the area code (as defined in Maintenance module - Basic tab - City Codes icon - City List window - [Create a new Record] - City Codes window). axiUm should not do this. More patients are using their cell number as their home number, and this cell number has a different area code from their city of residence. In these cases, auto-defaulting the area code makes their phone numbers invalid.

Solution: Fixed to retain the previously saved area code. Entering a new area code will not change this area code.

104496 - Next Appt date shows Pending when it shouldn't

Module: Patient Card window

Problem: In the Patient Card window's appointments section, the Next Appt static field displays Pending even if no pending appointments or booked appointments exist on this patient's record.

Solution: Fixed so that if a patient has neither pending nor booked appointments in the future, axiUm displays N/A in the Next Appt static field.

Perio Chart

104750 - Incorrect acronym for periodontal score

Module: Perio Chart ~ Perio EPR Forms window

Problem: In the Perio EPR Forms window (in Perio Chart module - [EPR Forms]), the six fields for entering perio scores displays the term DPSI. The term DPSI (Dutch Periodontal Screening Index) is the Dutch equivalent of the term PSR (Periodontal Screening and Recording). US and Canadian versions of axiUm should always display PSR.

Solution: Fixed so that US and Canadian versions of axiUm displays the term PSR, and Dutch versions of axiUm displays the term DPSI.
**Rolodex**

**104449 - Patient Card loading incorrect patient**

**Module:** Rolodex  
**Problem:** Sometimes, the Patient Card window does not display the active patient.

Steps to reproduce (you must follow these steps quickly):
1. From either the patient list or the patient selection list, highlight patient1.
2. Search for patient2.
3. From the patient list, click on patient2.
4. Click 📝 (Patient Card).
   axiUm displays the Patient Card window with details of a different patient (not patient2).
5. Open the Patient Info window by clicking anywhere in the Patient Card window.
   axiUm displays the Patient Info window with details of the patient2, this is fine; this is the patient currently selected.

**Solution:** Fixed so that the Patient Card window always displays the active patient. In the above scenario, the Patient Card window displays the details of patient2.

---

**105503 - Cannot enable option in Patient Approvals window**

**Module:** Rolodex ~ Patient Approvals window  
**Problem:** In the Patient Approvals window, the Effective on Treatment Date option is disabled, and there is no way to enable it, which prevents people from using it.

**Solution:** Fixed. Now the Effective on Treatment Date option is enabled.

---

**Transactions**

**101850 - Submitting dual insurance claim shows error on 2nd claim**

**Module:** Transactions - Treatment tab  
**Problem:** When you submit a claim for a patient who has dual insurance coverage, axiUm displays the EDI processing window, this is fine. However, after processing this claim, axiUm
displays another EDI processing window, this time for the second insurance company, and it should not display this window at this time.

**Solution:** Fixed so that when a patient has dual coverage and you submit a claim for the first insurance company, axiUm displays the EDI processing window for the first insurance only. Then after the first insurance claim is adjudicated and submitted to the second one, axiUm displays the EDI processing window for the second insurance company.

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**104142 - Insurance payment correction displays incorrect amount**

**Module:** Transactions - Ins Pmt tab

**Problem:** In the Applying Ins. Payment window (in Transactions module - Ins Pmt tab - Pt. Allocate button), if you correct an insurance payment (i.e. adjudication reversal), the Ins Pmt tab displays incorrect amounts in the Held column and the Applied column. The sum of these two columns must always equal the Amount column; however, in some cases axiUm is not doing this.

**Solution:** Fixed so that the sum of the Held column and the Applied column always equal the Amount column.

---

**104368 - EOB record saved when no entry made**

**Module:** Transactions

**Problem:** When you open and close the Explanation of Benefits (EOB) Details window, without entering anything, axiUm saves the EOB as an empty-entry record.

To replicate this bug:

1. Open the Explanation of Benefits (EOB) Details window (e.g. from the Transactions module - Treatment tab - Treatments tab - highlight item from list view - right-click - EOB Details option).
   
   Note: At this point, axiUm is preparing (in the background) to automatically add this EOB record to the database when you save it.

2. Close the Explanation of Benefits (EOB) Details window.
   
   Note: At this point, if nothing was entered, axiUm should cancel the EOB record it was preparing to auto-add in the background.

3. Open the Explanation of Benefits (EOB) Details window.
   
   The Add EOB button is enabled. This means that axiUm added a CLAIMEOB record even if you entered nothing.

**Solution:** Now in the above scenario, the EOB button is disabled, indicating that no EOB record was entered.

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**104381 - Incorrect message displays for insurance payment credits**

**Module:** Transactions - Ins Pmt tab
**Problem:** When a patient’s insurance company allows you to leave insurance over-payments as a credit on the patient’s record (in Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List - run a search - Edit Record - Insurance Company window, the Over-pmt drop-down field displays the Leave credit option), and you enter an insurance payment from this insurance company, axiUm displays the error message, "Field must have a value." This message should not display.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the error message.

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**104440 - Disabled adjustment fields in Applying Ins. Payment window**

**Module:** Transactions - Ins Pmt tab

**Problem:** When you correct an insurance payment that was entered in error (i.e. adjudication reversal), and you must either transfer the uninsured amount to the patient or write it off, the adjustment fields are disabled, and you cannot perform the transfer or write-off. To enable these fields, you must close and re-open the Applying Ins. Payment window and select the same record from the list view.

**Solution:** The adjustment fields are now enabled at the time of the insurance payment reversal.

---

**104942 - REF segment not found in 2400 loop**

**Module:** Transactions ~ EDI Claims window

**Problem:** NY Medicaid institutional EDI claims were being incorrectly populated with a REF*6R segment in the 2400 loop. This was causing these claims to be rejected.

**Solution:** The REF*6R segment is no longer populated in the 2400 loop for NY Medicaid institutional EDI Claims.

---

**105419 - Refund Payment right-click option not working**

**Module:** Transactions - Ins Pmt tab

**Problem:** When you right-click on an insurance payment record and select the Refund Payment option, axiUm displays the error message, "Only the Held portion of payment may be refunded and that amount must be greater than $0", even if nothing has been allocated and the held portion of this payment is equal to the Amount column.

**Solution:** Fixed so that the Refund Payment option works for both unallocated and partially allocated payment records.

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**105840 - Problem rebilling NY Medicaid visits that are 100% APG**

**Module:** Transactions - Treatment tab

**Problem:** When a NY Medicaid claim that is 100% APG is rebilled, the claim contains no insurance, and the amount displays $0. If you try rebilling this claim a second time (by clicking the Add button on the Rebill Treatments window), axiUm displays the message, "A medicaid visit for a different Insurance Company already exists on this date!" You are then unable to continue.
Solution: Fixed. Now in the above scenario, axiUm bills using correct amount.
axiUm Release 5.00.06

EHR

105462 - Students can add/edit evaluation as the instructor
Moduel: EHR - Tx History tab

Problem: When a student adds an evaluation form (by selecting the Add Student Eval right-click option), axiUm displays the User Authentication window for an instructor to swipe. However, if the instructor is not around to do this, the student can click the Cancel button, and then axiUm displays the Add/Edit Evaluation window. This lets the student access the evaluation form as the instructor.

Solution: Fixed so that when you click the Cancel button on the User Authentication window, axiUm cancels the authentication process, and does not display the Add/Edit Evaluation window.

105465 - Problems continuing evaluation forms
Moduel: EHR - Tx History tab

Problem: This problem occurs if you have graded a student using one of the following:

- one set of two evaluation forms
- one evaluation form that was graded twice

Then when you highlight the treatment record and select the Add Student Eval right-click option, axiUm displays the Select Evaluation to Continue window listing these evaluation forms. The instruction asks, "Would you like to continue the selected Evaluation?" and offers Yes/No buttons. The following problems occur:

- When you select a line and click the Yes button or the No button (it does not matter), axiUm continues to display the Select Evaluation to Continue window multiple times before displaying the evaluation form, with the previous answers displayed in the lower part of the form.
- If you don't select a line and click the Yes button or the No button (it does not matter), axiUm displays an empty evaluation.

Solution: Changed the behavior of the Select Evaluation to Continue window, as follows:

- If you select a line and click the Yes button, axiUm displays the selected evaluation form, and you can continue to grade it (if it wasn't completed) or add another set of grades for the top section.
- If you select a line and click the No button, axiUm displays an empty evaluation form, and you can add a new form.
- If you do not select a line and click the Yes button, axiUm forces you to select a line.
If you do not select a line and click the No button, axiUm displays an empty evaluation form, and you can add another form.

- The View button is disabled if no lines are selected.

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**Evaluations**

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**105674 - Evaluations module crashes**

**Module:** Evaluations

**Problem:** When adding additional sessional evaluations via the Evaluations module, axiUm had the following behavior:

- Sometimes, the forms available for the additional evaluation would incorrectly list periodic, rather than sessional, evaluations.
- Sometimes, when adding a comment to an additional evaluation, axiUm would crash.

**Solution:** Fixed crash.

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**General**

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**105800 - Access given to disabled modules**

**Module:** GUI

**Problem:** Disabled, optional modules have become accessible to users. This poses the risk of generating bad data.

**Solution:** Fixed so that you cannot access disabled, optional modules. For example, if you go to Maintenance module - Tx Plan tab - Detailed Plan Text Codes icon (and this feature is disabled), axiUm displays the message, "Quote functionality is not available".

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**114799 - Patient check-in alert refresh problem**

**Module:** Status bar

**Problem:** There is a refresh problem with the patient check-in alert. This may cause the selected patient's check-in alert indicator to revert from blue (indicating that approval is required) to gray.

**Solution:** Fixed.
116069 - NetRefresh causing Patient menu to reload

**Module:** Desktop  
**Problem:** NetRefresh broadcasts are causing the Patient menu to reload unnecessarily.  
**Solution:** Fixed.

---

**Info Manager**

105682 - Patient Balances report causes database warning

**Module:** Info Manager - Billing tab  
**Problem:** If you run the Patient Balances report containing a date condition, axiUm displays a database warning message.

Steps to replicate:

1. Go to Info Manager module - Billing tab.  
2. Select the Patient Balances category.  
3. Select the As at Date option. axiUm displays the Option Condition window.  
4. Select the Current Date checkbox.  
5. Click the OK button. axiUm closes the Option Condition window and returns to the Info Manager window.  
6. Click Search.  
   
   axiUm displays a Database Warning window.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the Database Warning window.

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**Maintenance**

105980 - Canadian practices displaying US-only fields

**Module:** Maintenance ~ Insurance Company window  
**Problem:** This applies only to Canadian practices. If your practice is in Canada, axiUm still displays ICD codes, which are only applicable in the US. The following US-only fields are shown in axiUm:

- Maintenance module - System tab - System Options icon - System Options window - System Options section: **Medical Diagnosis Code Type** drop-down field
- Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window - Insurance Company window: **Diag. code type** drop-down field

**Solution:** Fixed so that if you have a Canadian practice (in Maintenance module - Office tab - Practice Address icon - Practice Address window - System Settings section, the Canada option is selected), these fields are hidden.

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**Patient Card**

**102533 - Required field should be removed**

**Module:** Patient Info - Personal tab

**Problem:** Starting version 5.0, axiUm requires you to enter the patient’s home phone number before saving the patient record. This means many patient records created in previous versions (before 5.0) contain no home numbers. If you open one of these patient records using version 5.0, edit their information (e.g. address), and click the Save button, axiUm notifies you that the home number is required before saving. This can be problematic if you do not have their phone number to enter at this time.

**Solution:** Fixed. The home phone number is no longer required. If you want to make a field required, you must indicate it in the Required Fields window (in Maintenance module - Basic tab - Required Fields icon).

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**Scheduler**

**116115 - Network refresh crash**

**Module:** Scheduler - Active tab

**Problem:** When you are using the book method of scheduling, and the book uses book-by-chair method, a network refresh sent from a workstation (where someone is either creating a new appointment or modifying an existing one), could cause the receiving workstation to crash.

**Solution:** Fixed.

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**116130 - Removing provider from dynamic book causes crash**

**Module:** Scheduler - Active tab

**Problem:** When you are in a book that uses dynamic columns and book-by-provider method, and you right-click on a provider column and select the Remove Provider option, axiUm displays the message, "Unhandled exception: bad allocation" and then crashes.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.
Ehr

105731 - Template Note answers display outside their tags
Module: EHR ~ Template Note window

Problem: In a template note, when you enter text-type answers in a tag and you press the ENTER key to move to the next tag, axiUm displays your answer outside the tag (either before or after it).

Solution: Fixed so that in the above scenario, pressing the ENTER key properly displays the answer within the tags.

Evaluations

116296 - Inconsistent Instructor List window behavior
Module: Evaluations ~ Instructor List window

Problem: When accessed in places other than the Appointment Expert, the Instructor List window displays the Show Instructor checkbox. This checkbox is unnecessary because only instructors are displayed in the list view.

Solution: Now the Show Instructors checkbox has been removed from the Instructor List window. Similar windows in other modules have also been fixed by removing this checkbox. This checkbox remains available in the Appointment Expert Instructor List.

General

105228 - Odd behavior with start checks & planned procedures
Module: Start Check

Problem: axiUm displays several odd behaviors during the start check process for appointments containing Planned Procedures (placeholder procedures added via the Planned Procedure control in the Appointment Treatments dialog).

Book appointment1 that includes planned procedure1 and planned procedure2. Run the start check process. axiUm warns there is no patient consent on file, even though Planned Procedures do not require one (problem 1). Select to continue. Next, add planned procedure3 to the same appointment1. Run the start check process again. axiUm displays duplicate planned procedure
records (problem 2). axiUm also warns that all treatments have been start-checked, however, only two of three have been start-checked (problem 3).

**Solution:** For the above scenario, the following fixes have been made:

- Solution 1: Patient Consent Missing (Procedure) Warning window (new): This window displays if all patient, provider and procedure requires consent, and only when start-checking procedures associated to appointments with no treatments.
- Solution 2: axiUm no longer displays duplicate planned procedure records in the Start Check window. It only displays each planned procedure once.
- Solution 3: axiUm no longer displays a warning indicating that all treatments have been start-checked. It only displays those items that have not been start-checked.

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**105578 - Provider ID disappears from status bar**

**Module:** Status bar  
**Problem:** When you switch users, axiUm no longer shows the provider ID.

**Setup:**

1. Open the Desktop Settings window.  
   Go to Maintenance module - System tab - Desktop icon.

2. Select the Show Provider # checkbox.

![Desktop Settings window](image)

3. Click the Accept button.

When you log into axiUm as provider1, axiUm displays the provider ID on the status bar, this is fine. However, when you go to the Switch User window (in Tools menu - Switch User option), and log in as provider2, axiUm no longer displays the associated provider ID in the status bar.

**Solution:** Fixed so that the provider ID is always displayed in the status bar.
116249 - Swiping card displays error message

Module: Swipe Cards

Problem: When you swipe to approve notes and evaluation forms, axiUm initially displays the details of the note or the evaluation form that you are about to approve. Then when you swipe a second time to approve it, axiUm displays the message, "Invalid User ID" even if you’re using the same swipe card. Sometimes, axiUm can crash after the message.

Solution: Fixed so that in the above scenario, axiUm no longer displays this message, nor crashes.

116254 - Change System Defaults checkbox appear in other windows

Module: Authentication

Problem: In version 5.0, we added the ability to display the Change System Defaults checkbox in some axiUm windows (see 49796 in the 5.0 Enhancement document):

![User Log On](image)

This checkbox is only required for windows used to switch user, log on as a different user, or log off the application. However, this checkbox is displayed in other windows (e.g. User Authentication window) where it is not required, and selecting this checkbox does not display the Set axiUm Defaults window.

Solution: Fixed so that the above windows no longer display the Change Station Defaults checkbox.

Maintenance

105539 - Selected insurance companies not showing in field

Module: Maintenance ~ Auto Batch Unsubmitted Claims window

Problem: This occurs in the following windows:

- Print Held Claims window (in Maintenance module - System tab - Processes icon - Processes window - Print Held button)
- EDI Claims window (in Maintenance module - System tab - Processes icon - Processes window - EDI button)
- Auto Batch Unsubmitted Claims window (in Maintenance module - System tab - Processes icon - Processes window - Auto Claim button)
- Print Insurance Aged Balances window (in Info Manager module - Practice tab - Insurance Aged Balances category)

If you click on either the **Exclude ins. (ellipsis)** or the **Include ins. (ellipsis)** and select a record from the Exclude Insurance Companies window, the selected record does not display in the **Exclude ins.** field.

**Solution:** Fixed so that axiUm displays the selected insurance company in the field.

---

**116322 - Problems editing patient limit on benefit plan**

**Module:** Maintenance ~ Edit Benefit Plan window

**Problem:** This occurs when you edit the patient limit on a benefit plan using the Edit Benefit Plan window (in Maintenance module - Insurance tab - Benefit Plans icon - Benefit Plan List window - run a search - highlight a record - (Edit/View Benefit Plans)).

![Edit Benefit Plan Window](image)

Then when you save the changes, axiUm displays the Adjust Limit and Deductible Balances window, asking you how you want to adjust this amount for other subscribers.
Select the **Reset the balances** option. This means axiUm will reset the patient limit on all patients associated to this benefit plan.

Then when you look in the patient’s dependent’s record (in Patient Info window - Insurance tab - Dependents button - Dependents window), their patient limit has not been reset with the new amount.

Note: If you edit the patient limit on a benefit plan using the Patient Info window's Insurance tab, this works fine, axiUm updates their dependents' patient limits correctly.

**Solution:** Fixed so that in the above scenario, axiUm updates the patient limit balance in the Dependents window.

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**Rolodex**

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**116045 - Duplicate preventive care records**

**Module:** Rolodex ~ Preventive Care Details window

**Problem:** Sometimes when you update (advance) a preventive care record for patients with no history of having all three types (hygiene, exam, and x-ray), axiUm leaves an incomplete record in the database. This results in bad data and can cause axiUm to crash.

**Solution:** Fixed.

---

**116090 - Preventive Care records with blank Code field**

**Module:** Rolodex ~ Preventive Care Details window

**Problem:** In the Preventive Care Details window, you can enter an exam or an X-ray date without entering an associated code, creating orphaned records in the database. These orphaned records accumulate and take up space.

**Solution:** Fixed. Now if you enter an exam or an X-ray date, axiUm forces you to enter the associated code before saving the Preventive Care Details window.
114478 - Unnecessary checkbox

**Module:** Rolodex ~ Appointment Request window

**Problem:** In the New Appointment Request window (in Rolodex module - patient selection list - right-click - Appt Request option), if you click on the Instructor (ellipsis), axiUm displays the Instructor List window. This window displays a Show Instructors Only checkbox.

![Instructor List Window](image)

However, if this window lists only instructors, this checkbox should be selected and disabled.

**Solution:** Now in the above scenario, this checkbox is selected and disabled by default.

---

**Scheduler**

116066 - Appointment pop-ups not reappearing

**Module:** Scheduler - Active tab

**Problem:** This occurs if your workstation is running Windows XP. When you hover over an appointment the first time, axiUm displays a pop-up window showing details of that appointment. However, axiUm does not display this pop-up for subsequent attempts (unless a refresh occurs).

**Solution:** Fixed so that the pop-up always displays.

---

116200 - Selecting appointment does not go to that date & time

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In the Appointment Expert window, if you run a search with no patient selected in the search criteria, double-clicking on a search result no longer takes you to that date and time in the appointment book as it did in version 4.81.

**Solution:** Fixed so that in the above scenario, axiUm retains the old (version 4.81) behavior. In other words, axiUm minimizes the Appointment Expert window and takes you to the selected date and time in the appointment book.
116206 - Problems with Appointment Expert window’s preview mode

Module: Scheduler ~ Appointment Expert window

Problem: Sometimes, when you run a search in the Appointment Expert window and you select an available time block (for chairs in a book that the user has no access), axiUm displays the message, "User does not have access to any books with this chair in it." This is fine. However, when axiUm displays the Appointment Expert window in preview mode immediately after this message, this window flickers.

Solution: Now in the above scenario, after axiUm displays the message, it no longer displays the Appointment Expert window in preview mode.

Transactions

105262 - Pre-payment amount showing in unrelated payment record

Module: Transactions ~ Applying Payment window

Problem: This occurs when you have multiple patient payment records. If you allocate payment1 (either whole or in part) towards a pre-payment, and then you view payment2, the Applying Payment window for payment2 displays the pre-payment amount from payment1.

Solution: Fixed

116243 - Problem rebilling treatment with 3 policies

Module: Transactions ~ Rebill Treatments window

Problem: If a patient record contains three insurance policies (insurance1, insurance2, and insurance3), and you transfer some of the treatment balance from insurance2 to insurance3, rebilling the treatment to these two insurance companies causes insurance2 to become both insurance1 and insurance2 (so insurance2 is billed twice). The treatment record in the Treatment tab appears as if the treatment was billed only once to insurance2, but the database shows as being billed twice.

Solution: Fixed.

X-Ray

116323 - MiPACS incompatible with old encryption method

Module: X-Ray

Problem: MiPACS, if using the old encryption method, is not integrating with axiUm 5.0. This is because axiUm is now sending the user’s password in encrypted format and MiPACS is unable to match this to the non-encrypted password on file.

Solution: Fixed so that MiPACS works with the old encryption method.
axiUm Release 5.00.08

EHR

116506 - 2 users on same treatment record causes duplicate records

**Module**: EHR ~ Edit Treatment window

**Problem**: This occurs when user1 is on workstation1 and viewing treatment1, while user2 is on workstation2 and viewing the same treatment1. When both users update this treatment record from both workstations at the same time, saving the changes causes axiUm to duplicate the treatment TREATME2 record, and displays both copies in the Tx History tab.

**Solution**: Now in the above scenario, when both users save the changes, axiUm displays a message on one of the workstations, "This treatment record has been modified by another user. Cannot continue!"

116734 - Incorrect field name in Patient Medical Alert History window

**Module**: EHR ~ Patient Medical Alert History window.

**Problem**: In the Patient Medical Alerts window (in EHR module - Alerts tab - right-click - Update Medical Alerts option), there is an Alert Code field. This is fine. However, when you click (Show History) to display the Patient Medical Alert History window, the same field is called the Need Code field.

**Solution**: Changed the field name in the Patient Medical Alert History window from Need Code to Alert Code so that field names in entry windows are parallel with field names in the associated history windows.

116831 - Problem adding procedures that don't use surfaces

**Module**: EHR - Chart Add tab

**Problem**: When you add a procedure code that requires no surface selection, axiUm still displays the message, "Cannot find the procedure with 0 surface(s) for the site entered. One or more of the treatments will not be added!"

**Solution**: Fixed so that when you select a procedure code that requires no surface selection, axiUm no longer displays this message.

General
116362 - Error message too generic

**Module:** Crystal Reports

**Problem:** If you are missing a report file (e.g. practice.rpt) in the sReports folder, axiUm displays a message, “Invalid Report File Path”. This message is too generic, and would be more useful if it specified the filename.

**Solution:** Now when you have missing reports, axiUm includes the report name in the error message, and indicates whether that report is either missing or that you have no access to it. This allows you to identify the problem and fix it yourself.

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116640 - axiUm crashes during auto-logout

**Module:** Login

**Problem:** Sometimes, when you are modifying a record (e.g. the Patient Info window, the Edit Benefit Plan window) and the auto-logout occurs before you can save the changes, axiUm crashes.

This occurs if axiUm has the following setup in the Desktop Settings window (in Maintenance module - System tab - Desktop icon):

- Auto Exit Work Station Override: selected
- Auto Exit (in mins.): any short number of minutes (e.g. 15)
- Exit Method: Log Off
- Auto Close Log On (in mins.): any short number of minutes (e.g. 1)

![Desktop Settings Window](image)

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes. When you are logged off, axiUm displays the User Logon window, and the information you were updating is not saved (because you did not have the opportunity to do so).

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116658 - Problems with 10-character provider codes

**Module:** Desktop
Problem: In the Entry on Behalf of Provider window (from Tools menu - Entry on Behalf of Provider option), if you select the Provider option, and in the field you enter a provider code that is 10 characters long, axiUm displays the message, "Invalid Provider Code!"

Solution: Now in the above scenario, axiUm no longer displays this message. Also, the provider code field in this dialog has been expanded so that 10-character provider codes are fully visible.

117192 - Login causes SQL error
Module: Database

Problem: This affects Dutch version only. Logging into axiUm displays a database warning message.

Solution: Fixed so that logging into axiUm no longer displays the database warning.

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Messenger

116554 - Search function not finding matching results
Module: Messenger ~ Select Message Recipients window

Problem: In the Select Message Recipients window (in Messenger module - 💌 (New Message) - New Message window - To field ⬟ (ellipsis)), entering a search criteria in the Criteria field (e.g. a provider ID) and clicking on a column heading (e.g. the Provider column), does not display matching results in the Members/Groups available to select list view.

Solution: Now clicking on the column headings return any results matching the entry in the Criteria field.

---

Transactions

105323 - Disabled drop-down options display in black instead of grey
Module: Transactions - Treatment tab

Problem: In the Status drop-down field, axiUm displays disabled options in black instead of grey. Similar problems found in EHR module - Tx History tab - View Treatment right-click option - View Treatment window - Discipline drop-down field.

Solution: Fixed in the above windows and other axiUm windows with similar problems.

---
116692 - Emdeon rejection for notes being too long

Module: Transactions ~ EDI Claims window

Problem: Emdeon rejects batches if a record contains a claim note that is too long (80+ characters).

Solution: Fixed so that claim notes are now truncated to 80 characters in EDI claim files.

Scheduler

92922 - Minimum gap rule being ignored on planned appointments

Module: Scheduler ~ Appointment Expert window

Problem: In the following scenario:

- The provider has a 1-chair day work schedule.
- In the Scheduling Rules window (in Maintenance module - Scheduler tab - Scheduling Rules icons), the provider has the Min Appointment Gap Time field defined (e.g. 20 minutes).
- In the Appointment Lists window (Scheduler window - (Lists)), search for a planned appointment for this provider, then select the Schedule With Expert right-click option to display the Appointment Expert window.
- In the Additional Appointment Info window (Appointment Expert window - More Appts button), add an additional appointment for this provider (e.g. a 15-minute appointment).

When you run a search in the Appointment Expert window, axiUm displays appointments with a 5-minute gap between the appointments. This violates the minimum gap rule of 20 minutes. This is because axiUm is ignoring the minimum gap time on the planned appointment.

Solution: Fixed so that in the above scenario, axiUm offers appointment blocks with a 20-minute gap time.

X-Ray

102583 - MiPACS integration

Module: X-Ray

Problem: axiUm’s desktop displays an unusual behavior when you do the following:

1. Open axiUm
2. Open MiPACS
3. Close MiPACS
4. Close axiUm
axiUm does not fully close. It remains open for several seconds (20 - 30 seconds), and displays the axiUm desktop but without the icons.

**Solution:** Fixed.
axiUm Release 5.00.09

Chart Tracker

116875 - Display behavior using XP themes

Module: Chart Tracker ~ Chart Out window

Problem: This occurs if your workstation uses Windows XP themes. In the Chart Out window (in Chart Tracker module - Chart Out button), the Date and Time option labels are misaligned.

Solution: Fixed to align correctly.

EHR

117021 - Date field is enabled

Module: EHR ~ Patient Medical Alerts window

Problem: In the Patient Medical Alerts window (in EHR module - Alerts tab - Update Medical Alerts right-click option), the Date field is enabled, and this leads you to think you can change the date. But when you add or modify an alert, axiUm saves it as the current date, ignoring what you entered in the Date field. Also, when you view this alert record’s history (in the Patient Medical Alert History window (Patient Medical Alerts window - 📆 (Show History)), it displays the current date (not the one you selected in the Date field).

Solution: When you add an alert record, the Date field is disabled and displays the current date. When you modify an alert record, axiUm retains the original date. When you view its historic record, it also displays the original date.

117249 - Procedure code not switching for object-type procedures

Module: EHR - Chart Add tab

Problem: axiUm does not switch procedure codes within its group for object-type procedures (in Maintenance module - Clinical tab - Procedure Codes icon - Procedure Codes List window - Procedure Code window - Graphic Detail section, the Type drop-down field displays the Object option).

For example, in the following setup:

- D6010 - Tooth, Anterior, Primary, Object, N/A, Surf=0, Group=6010
- D6020 - Tooth, Posterior, Permanent, Object, N/A, Surf=0, Group=6010
Then when you go to the Chart Add tab and select D6010 (applicable to only primary teeth) and add this procedure to tooth #30 (a permanent tooth), axiUm adds this procedure to this tooth.

**Solution:** Now in the above scenario, axiUm switches the procedure from D6010 to D6020.

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**117375 - Adding conditions & materials causes blank Provider field**

**Module:** EHR - Chart Add tab

**Problem:** When you (a provider) add conditions or materials, the Details tab’s Provider field is blank. When you view this record in the Tx History tab, the Prov/User column is also blank.

**Solution:** Fixed so that in the above scenario, axiUm displays the provider ID in both tabs.

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**117459 - Not auto-switching surface-based procedure with no group**

**Module:** EHR - Chart Add tab

**Problem:** Auto-switch does not work for surface-based procedures that have no procedure group. Auto-switch does not work for surface-based procedures that have no procedure group. For example, if D2330 is defined as a 1-surface procedure and D2331 is defined as a 2-surface procedure, and you select two surfaces, axiUm uses D2330, but it should switch to D2331.

**Solution:** Fixed so that surface-based procedures that are not in a procedure group will auto-switch correctly.

---

**117683 - Disallows entries with blank Provider field**

**Module:** EHR - Tx Plan tab

**Problem:** Lost the ability to enter general treatment records in the General Plan sub-tab that contains a blank Provider field. When you save the treatment plan, axiUm displays the message, "Invalid Provider Code!"

**Solution:** Regained the ability to enter general treatment records with a blank Provider field.

---

**Evaluations**

**117418 - Cumulative forms not displaying previous answers**

**Module:** Evaluations

**Problem:** In some cases, when grading a procedure that has grades already added (e.g. cumulative grade forms), axiUm does not display the previously entered grades in the bottom portion (Treatment Specific Question section) of the displayed grade form. This occurs when grading from both the Patient Approvals window and the Tx History tab - Add Student Eval right-click option.
Solution: Fixed to display answers in the form’s Treatment Specific Question section during the approval process.

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**General**

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117191 - Encrypted server name causes OO4O error

**Module:** .ini files

**Problem:** When using the legacy encryption method (Maintenance module - System tab - System Options icon - System Options window - System Options section, the Use Advanced Encryption checkbox is deselected), the encrypted versions of the database username, password, and/or server name would sometimes contain single-quote characters (') in the ciphertext. When axiUm reads these fields during login, it displays an OO4O error. This is not a problem when using the new encryption method.

**Solution:** Fixed so that in the above scenarios, axiUm no longer displays this error message.

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**Maintenance**

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116767 - Problem with renewing benefit plan from Maintenance

**Module:** Maintenance ~ Renew Benefit Plan window

**Problem:** When you renew a benefit plan in the Renew Benefit Plan window (in Maintenance module - Insurance tab - Benefit Plans icon - Benefit Plan List window - run a search - (Renew Benefit Plan)), and a patient on this benefit plan did not cover their dependents (in Patient Info window - Insurance tab - Dependents button - Dependents window), axiUm adds benefit coverage to the dependents on the renewed plan.

**Solution:** Fixed so that in the above scenario, any dependents not covered by a patient’s benefit plan remain without coverage when that benefit plan is renewed.

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117202 - Modifying license# causes crash

**Module:** Maintenance ~ Billing Doctors / Schedules window

**Problem:** In the Billing Doctors / Schedules List window (in Maintenance module - Office tab - Billing Doctors & Fee Schedules icon - Billing Doctors / Schedules window - run a search - (Edit Record)), if you go to the Billing Info section’s License# field and make changes to the existing value and then click the OK button, axiUm may crash.

The same problem occurs in the Provider Import window (in Maintenance module - Office tab - Provider Import icon) when you import a new provider of type Doctor (bills under self) or Fee Guide.

**Solution:** Fixed so that in the above scenarios, axiUm no longer crashes.
117432 - Description fields are confusing

**Module:** Maintenance ~ Station Options window

**Problem:** In the Station Options window, the description of the following station options is confusing:

- General section - Menu section - HideDisabledMenus item
  Description field: Whether to *show* menu items that have been disabled

- General section - Toolbar section - HideDisabledToolbars item
  Description field: Whether to *show* toolbar items that have been disabled

**Solution:** Changed the Description field to the following:

- General section - Menu section - HideDisabledMenus item
  Description field: Whether to *hide* menu items that have been disabled

- General section - Toolbar section - HideDisabledToolbars item
  Description field: Whether to *hide* toolbar items that have been disabled

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**Patient Card**

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117536 - Deductible become reset

**Module:** Patient Card - Insurance tab

**Problem:** This occurs if your practice is set to bill at the start of in-process (in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window - (Practice Options) - Practice Options window - Transactions Options section, the *Bill total amount at start of In Process* drop-down field displays the Yes option).

Then when you add a procedure, change it to In Process status, and then change it to Completed status, axiUm applies the deductible to the treatment. This is fine. However, axiUm resets the deductible and applies this to future treatments.

This works fine if you add a completed treatment (skipping the In Process status).

**Solution:** Fixed so that in the above scenario, axiUm no longer resets the deductible.

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**Scheduler**

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117031 - Problem rescheduling appointments

**Module:** Scheduler - Active tab

**Problem:** When you reschedule a booked appointment using Book mode (for a book without chair reservations), the appointment disappears from other books (those with chair reservations).
Setup to replicate:


![Book setup without reservations](image1)

2. Setup book2 by providers, with reservations.

![Book setup with reservations](image2)

Steps to replicate:

1. Book an appointment using book mode in book1 and for a provider that exists in book2. axiUm displays the appointment in both books. This is fine.

2. In book1, reschedule the appointment.

   The new appointment shows up in book1 but not in book2.

Because the appointments are not showing up in book2, re-booking this appointment causes students to become double-booked.

**Solution:** Fixed so that in the above scenario, books with chair reservations show the re-scheduled appointment.

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**117467 - Cannot submit appointment request**

**Module:** Scheduler

**Problem:** While viewing a book to which you have read-only access, you can make appointment requests from the Rolodex module. However, if you make appointment requests from the
Scheduler module, axiUm displays the message, "You have no write access to the current book. Cannot proceed!" Because appointment requests are not associated to any books, axiUm should allow either method for requesting appointments.

**Solution:** Fixed so that users with read-only access to books can submit an appointment request.

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**117532 - Phone number disappears from highlighted record**

**Module:** Scheduler ~ Appointment Lists window

**Problem:** In the Appointment Lists window (in Scheduler module - (Lists)), if you highlight an appointment and then select any of these right click options -- Confirm, Check In, Sign In, Cancel, Fail -- the highlighted record’s phone number disappears. This is due to a refresh issue.

**Solution:** Fixed.
axiUrn Release 5.00.10

EHR

117922 - Saving entries in EPR form is slow
Module: EHR - Forms tab
Problem: When you enter large EPR forms (e.g. those containing multiple checklists, with each checklist containing many items, and each item containing additional information), it takes a long time for axiUrn to save the EPR form (10 to 30 seconds).
Solution: Now in the above scenario, axiUrn takes less time to save the EPR form.

118201 - Phone-in prescriptions no longer work
Module: EHR ~ Patient Prescription Entry window
Problem: Before version 5.0, on the Patient Prescription Entry window (in EHR module - Prescriptions tab - (Create a new Record)) if you indicated that the prescription was phoned in, axiUrn saves the prescription on the patient's record. Now axiUrn displays the Select Printer window and you are forced to print before saving the prescription to the patient's record.
Solution: Fixed so that phone-in prescription works as before.

118481 - Deleted medical alert record not displayed
Module: EHR ~ Patient Medical Alert History window
Problem: When you add a patient medical alert in an EPR form, and later delete it, axiUrn does not audit this deletion in the Patient Medical Alert History window (in EHR module - Alerts tab - right-click - Update Medical Alerts option - Update Medical Alerts window - Show Delete checkbox - highlight item - (Show History)). axiUrn displays two added records but no deleted records; it should display one record for the creation and one record for the deletion.
Solution: Fixed so that in the above scenario, axiUrn displays one record for the creation and one record for the deletion.

118554 - Database needs cleaning
Module: EHR
Problem: Need to identify and clean duplicate records in the axiUrn database.
Solution: The duplicate data will be fixed during the upgrade process by axiUrn Support.
118812 - Selecting different patient causes error when adding note

**Module:** EHR - Chart Add tab

**Problem:** axiUm displays an error message when adding notes:

Steps to replicate:

1. Go to the Rolodex module and select patient1.
2. Go to the EHR module - Chart Add tab.
3. Leaving the EHR module open, return to the Rolodex module and select patient2.
4. Return to the EHR module - Chart Add tab.
5. Click 📝 (Add Note). axiUm displays the Select Note window.
6. Select any of the options (e.g. General Note option).
7. Click the OK button. axiUm displays the message, “Current patient does not match the note’s patient. Cannot proceed! Please contact support.”

**Solution:** Fixed so that in the above scenario, this message no longer displays and axiUm lets you add a note for the currently selected patient.

118813 - Notes modified in Chart Add not displaying in Tx History

**Module:** EHR - Chart Add tab

**Problem:** When a note is modified in the Chart Add tab, axiUm no longer displays it in the Tx History tab if that view has the Hide Notes by module checkbox selected (in EHR window - (Options/Settings) - EHR Options window - Tx History tab - Display Options section).

**Solution:** Fixed so that the note modified in the Chart Add tab now displays in the Tx History tab.

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**General**

116765 - Problem with renewing benefit plans through BPI interface

**Module:** Database

**Problem:** Similar to 116767, except the problem occurs when you use your institution’s own BPI (benefit plan interface). There is also the added problem of axiUm displaying the same value in the dependents record as those used in the guarantor’s record. In other words, the Dependents window displays all dependent records having the same value in the following fields and options:

- Dep. No / Pat ID
- Start Date
- End Date,
- Bill Order
**Solution:** Fixed so that in the above scenario, any dependents not covered by a patient’s benefit plan remain without coverage when that benefit plan is renewed.

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### 117933 - Sticky note GDI read failure

**Module:** Sticky Notes

**Problem:** Sometimes when you create a sticky note and then click on ✏️ (note options), axiUm displays an ObjectWindows Exception window with the message, “GDI failure. OK to resume?” At the same time, axiUm also displays an Error window with the message, “Insufficient memory to create the bitmap. Close one or more applications to increase available...”

**Solution:** Fixed so that in the above scenario axiUm no longer displays these messages.

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**Info Manager**

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### 117594 - A/R reconciliation report by department is out of balance

**Module:** Info Manager - Practice tab

**Problem:** The A/R Reconciliation report shows as being out of balance when the following conditions are met:

- The A/R Reconciliation window’s for Dept field displays a selected department. For example, Anesthesia.
- The A/R Reconciliation window’s Group by section displays an option in only one (not both) of the drop-down fields. For example, the first drop-down field displays the Provider Code option.
- The value in this drop-down field changed in a treatment record that falls within the report’s date range. For example, the provider changed in a treatment record.

**Solution:** Fixed so that in the above scenario, the A/R Reconciliation report is balanced.

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### 118528 - Bad condition data causes SQL error

**Module:** Info Manager ~ Missing Charges report

**Problem:** In the Missing Charges report (in Info Manager module - Practice tab - Missing Charges category), if a bad data condition occurs, axiUm displays an SQL error.

**Solution:** The report now handles the bad data condition and no longer shows the SQL error.
119127 - Report stops processing

**Module:** Info Manager ~ Insurance Aged Balances report

**Problem:** When running the Insurance Aged Balances report (in Info Manager module - Practice tab - Insurance Aged Balances category), axiUm does not complete the process if you select to show Sticky Notes in the report. The tree view displayed in the preview indicates there should be more records to display, but the report does not show them.

**Solution:** Fixed so that in the above scenario, axiUm displays the Insurance Aged Balances report in full.

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**Maintenance**

118260 - 5010 EDI Claims not including provider phone number

**Module:** Maintenance ~ EDI Claims window

**Problem:** X12N 5010 EDI Claims were not being populated with a PER segment in the 2010AA loop, causing claims to be rejected at the clearinghouse level.

**Solution:** There is now a PER segment in the 2010AA loop. This segment looks like ^PER*IC*OFFICE CONTACT*TE*########## where # is the phone number of the provider including the area code.

---

**Patient Attachments**

118156 - Letters created are not indicated in patient contact notes

**Module:** Patient Attachments

**Problem:** This occurs when adding letters specifically set up to show in the patient’s contact notes. You can verify this by going to the Info Manager module - Letters button - Select Letter Template window - Edit button - Edit Letter Template window, and making sure the Add to Contact Notes checkbox is selected.

Then when you add this letter to the patient record (by going to Patient Attachments module - Letters button - Select Letter Template window - Select button), axiUm does not create a record in the Patient Contact Notes window (in Patient Card window - 📄 (Contact Notes)) to indicate that this letter was created.

Adding the same letter from the Info Manager module works fine. This is done by going to Info Manager window - Letters button - Select Letter Template window - Select button.

**Solution:** Fixed so that adding letters set up to show in the patient’s contact notes now display a record indicating that a letter was added.
**Patient Card**

**118462 - Insurance default options**

**Module:** Patient Card window

**Problem:** In the Patient Info window - Insurance tab, need the ability for axiUm to default the **Can have multiple subscribers** checkbox as selected or deselected.

**Solution:** Now axiUm has the ability to default the **Can have multiple subscribers** checkbox as selected or deselected by default.

**Setup:**

1. Open the Station Options window.
   - Go to Maintenance module - System tab - Station Options icon.
2. Go to Patient / Rolodex section - Card section - MultipleSubscribers item (new).
   - 0: Deselects the **Can have multiple subscribers** checkbox by default.
   - 1: Selects the **Can have multiple subscribers** checkbox by default.
118747 - Mobile # is cut off

**Module**: Patient Card window

**Problem**: In the Patient Card window, axiUm cuts off the last digit displayed in the Mobile # static field.

**Solution**: Fixed.

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### Scheduler

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116997 - Hygiene appointments overlap enforced discipline times

**Module**: Scheduler ~ Appointment Expert window

**Problem**: axiUm lets you book hygiene appointments where the auto-added 10-minute exam time overlaps an enforced discipline time.

**Solution**: Fixed so that axiUm no longer offers appointment times where the exam time would overlap an enforced discipline time.

---

117912 - Cannot reserve chair immediately after non-clinic time

**Module**: Scheduler ~ Provider Non Clinic Times window

**Problem**: If you have a non-clinic time (e.g. 8:00am - 9:00am) and try to partially reserve a chair immediately after this non-clinic time (e.g. 9:00am - 11:00am), axiUm displays the message, "'Provider has a non-clinic time with the following reason ______. Are you sure you want to cancel it and proceed with the reservation?'"

**Solution**: Fixed so that in the above scenario, you can reserve a chair immediately after a non-clinic time.

---

117966 - Inconsistent pop-up behavior

**Module**: Scheduler - Chair tab

**Problem**: In chair mode of scheduler, hovering over a reserved chair may or may not display the yellow pop-up containing chair details. Sometimes it displays correctly, other times it flashes on and off quickly, and other times it displays only a thin vertical bar.

**Solution**: Fixed so that axiUm displays the pop-up details correctly and consistently.

---

118027 - Rescheduling recall not auto-adding exam time

**Module**: Scheduler - Chair tab

**Problem**: When you schedule a recall appointment with a primary hygienist, axiUm automatically adds the exam time to the appointment. However, if you reschedule the same appointment but
with a different hygienist, axiUm no longer includes the exam time when you book the appointment.

Solution: Fixed.

---

**118058 - Speed issue**

**Module:** Scheduler

**Problem:** In some institutions, displaying the Appointment Treatments window takes a long time to display.

Solution: Improved the speed so that axiUm displays this window faster.

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**118180 - Problem with books containing 125+ providers**

**Module:** Scheduler

**Problem:** There is a problem displaying books containing more than 125 providers. This occurs when the book is defined in a specific way in the Books window (in Maintenance module - Scheduler tab - Books icon). See screen shot below for exact setup:

![Books window](image)

Then in the Scheduler module, you do the following:

- Attach more than 130 providers to the book.
- Order the providers so that on a specific date, the first 125 providers have no appointments or reserves while the last five providers do have appointments or reserves.

When you open the book, axiUm displays the message "This book has exceeded 125 columns. Note: the number of providers selected for the book may be less than 125 because a provider can have more than one chair."

Solution: Now opening the book displays one column per working provider.
118200 - Limited exams not obeyed

**Module**: Scheduler ~ Appointment Expert window

**Problem**: In a few cases, limited exams are not working correctly. These limited exams are defined in the Users window’s Provider field’s Scheduler section, in the Limit Exams checkbox and field.

**Solution**: Fixed.

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**Transactions**

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117874 - Screen flashes when selecting records

**Module**: Transactions - Treatment tab

**Problem**: In the Treatments tab list view, if you highlight treatment records rapidly in succession, the window flickers.

**Solution**: Fixed so that in the above scenario, the window no longer flickers.

---

118477 - Ortho pre-authorization not retained on billing records

**Module**: Transactions - Pmt Plan

**Problem**: When you create an ortho payment plan, axiUm does not associate the pre-authorization information to its ortho billing record. This affects ortho claims submitted to insurance.

**Solution**: Fixed so that axiUm retains the pre-authorization information with its associated ortho billing record.
axiUm Release 5.00.11

EHR

118868 - Forms not prompting for signature

Module: EHR - Forms tab

Problem: While entering EPR forms for one patient, if you select another patient using the Patient menu (instead of the Rolodex module), axiUm does not ask for a patient signature on the current EHR form.

The same problem occurs when you are entering EPR forms for a patient and change users through the Tools menu’s Switch User option or the Log on as user option.

Solution: Fixed so that in the above scenarios, axiUm always asks for a patient signature.

119011 - Cannot add the last procedure code displayed in a branch

Module: EHR - Chart Add tab

Problem: When the following conditions are met:

- In the Procedure Codes List window (in Maintenance module - Clinical tab - Procedure Codes icon), select the procedure code that is displayed as the last item within the last branch.
- In the Procedure Code window, you have the following setup:
  
  Location section:
  
  - Site: This drop-down field displays the Tooth option
  - Teeth: This drop-down field displays the OK for all teeth option
  - Age: This drop-down field displays the Mixed option.

  Graphic Detail section:
  
  - Type: This drop-down field displays the Text option
  - Zone: This drop-down field displays the N/A option
  - Suf. Number: This field displays 0

Then in the Chart Add tab, if you select this procedure code and also select a tooth (not a surface), axiUm displays an incorrect error message indicating that it cannot find the procedure.
5.0 Bug Fixes

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the error message.

---

### 119074 - Problem adding treatment in Chart Add tab

**Module:** EHR - Chart Add tab

**Problem:** If you highlight a treatment record in the list view and click on a white area, the following occurs:

- axiUm retains the highlighted treatment record in the list view and also the highlighted procedure code in the Codes tab.
- The 📝 (Modify Record) icon remains enabled.

**Solution:** Fixed so that in the above scenario, axiUm deselects the highlighted item and disables the 📝 (Modify Record) icon.

---

### 119408 - Cannot modify unapproved procedures in Chart Add tab

**Module:** EHR - Chart Add tab

**Problem:** If you select an unapproved treatment record for a non-site-based procedure (e.g. D0120) and you change this procedure code to a site-based procedure code (e.g. D1351), clicking 📝 (Modify Record), displays the message, “This treatment record has been modified by another user. Cannot Continue!”

**Solution:** Fixed so that in the above scenario axiUm no longer displays this message.

---

### 119467 - Mouse wheel not moving horizontal scroll bar

**Module:** EHR - Tx History tab

**Problem:** Sometimes, depending on your screen resolution, when the list view displays only a few records (so the vertical scroll bar is hidden), using the mouse wheel does not move the horizontal scroll bar. If you first click somewhere in the list view, this works.

**Solution:** Fixed so that in the above scenario, the mouse wheel moves the horizontal scroll bar, regardless of your screen resolution.
119696 - Refresh problem with Imaging tab using Emago

Module: EHR - Imaging tab

Problem: This problem occurs if you are using version 5.0 with Emago. When you import images in the EHR window's Imaging tab and click (Reload Images), the Intraorals field, the Panoramic field, and the Photos field display the old and new numbers overlapping each other. This is caused by a refresh problem. If you close the EHR module and re-open it, the numbers display correctly.

Solution: Fixed refresh problem on Imaging tab.

119771 - EPR form question causes crash

Module: EHR ~ View Form Instructions window

Problem: If a form question contains the maximum number of characters allowed (255) and this form question contains instructions, opening the View Form Instructions window and then closing it causes axiUm to crash.

Setup:
1. Open the Form Item - Question window.
   Go to Maintenance module - EHR tab - EPR Form Setup icon - EPR Form Setup window - Form Definition - Form Pages window - Form Page Definition - Create a new Record - Question.
2. In the Answer Type drop-down field, select the Long Text option.
3. In the Text textbox, enter a question using the maximum 255 characters allowed.
4. Click the OK button.
   axiUm saves the changes, closes the Form Item - Question window, and returns to the Form Page Definition window.
5. Click (Form Instructions).
   axiUm displays the Form Instructions window.
6. In the text box, enter instructions pertaining to the long question.
7. Click the OK button.
   axiUm saves the entries, closes the Form Instructions window, and returns to the Form Page Definition window.
8. Click (close).
   axiUm closes the Form Page Definition window and returns to the EPR Form pages window.
9. Click (close).
   axiUm closes the Form Pages window and returns to the EPR Form Setup window.
10. Click (close).
    axiUm closes the EPR Form Setup window and returns to the Maintenance window.

Steps to replicate:
1. Go to the EHR window’s Forms tab.
2. Click 🔄 (Create a new Record).
   axiUm displays the Add Form window.
3. Add the form defined in the setup above.
4. Click the OK button.
5. Highlight the long question defined in the setup and select the Show Instructions right-click option.
   axiUm displays the View Form Instructions window.
6. Click ✗ (close).
   axiUm crashes.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.

---

**120008 - TREATME2 records are forked**

**Module:** EHR - Tx History tab

**Problem:** This problem occurs when multiple users on multiple workstations are editing the same treatment at the same time, and at least one of those users does one of the following:

- Changes the status of the treatment (from P->I, P->C, I->C)
- Modifies the treatment

Then in some cases axiUm duplicates TREATME2 records, causing the same treatment to display multiple times in the Tx History tab (Note: Transactions module is not affected).

**Solution:** Fixed so that all users who have the same treatment open after the first user modifies it receive an error message that the treatment has been modified by another user, and axiUm no longer creates duplicate records.

---

**120171 - Entering long SOAP notes in Tx History tab causes crash**

**Module:** EHR - In Progress tab

**Problem:** In the Tx History tab, if you add a SOAP note and enter the maximum allowable length (4,000 characters) in all four text boxes (Subjective, Objective, Assessment, and Planned), clicking on the In Progress tab immediately after crashes axiUm. If your default tab is the In Progress tab, you can no longer open the EHR module when this patient is selected.

**Solution:** Fixed so that the In Progress tab supports notes containing the maximum length.

---

**120357 - Cannot add procedure codes defined as level 1 nodes**

**Module:** EHR - Chart Add tab
**Problem:** In some cases, if you try adding a procedure, axiUm displays a message indicating you cannot add this.

**Setup:**
1. Open the Procedure Code window.
   - Go to Maintenance module - Clinical tab - Procedure Codes icon - run a search - highlight a record - (Edit Record).
2. In the Procedures section, go to the Node drop-down field and select the Level 1 option.
3. In the Location section, go to the Site drop-down field and select the Tooth option.
4. Go to the Graphical Detail section and enter the following fields:
   - Type: This drop-down field displays the Text option
   - Zone: This drop-down field displays the N/A option
   - Suf. Number: This field displays 0
5. Click the Save button to save the changes.
6. Click the Close button to close the Procedure Code window and return to the Procedure Codes List window.
7. Click (close) to close the Procedure Codes List window.

**Steps to replicate:**
1. Go to the EHR module's Chart Add tab.
2. Select this procedure, and select a tooth.
3. Add this procedure as a treatment (either planned, in-process, or completed).
   - axiUm displays a message indicating that it cannot find a procedure with 0 surfaces.

![Message](image)

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message.

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**Maintenance**

**119278 - Right-clicking in EDI Claims window causes crash**

**Module:** Maintenance ~ EDI Claims window
**Problem:** When you go to the EDI Claims window (in Maintenance module - System tab - Processes icon - Processes window - EDI Claims button), select the Remittance Responses tab, and either with no records displayed in the list view or without highlighting any displayed records, you right-click, axiUm crashes.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.

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**119542 - Obsolete field requirements**

**Module:** Maintenance ~ Required Field Definitions window

**Problem:** In previous versions of axiUm, the Patient Info window - Clinical tab - Patient Physician section displayed the Phone# fields indicating the physician’s area code, phone number, and extension number. Since version 5.00, we have removed these Phone# fields. However, these fields have not been removed from the Required Field Definitions window (in Maintenance module - Basic tab - Required Fields icon - Required Fields window - (Required Field Definitions)).

**Solution:** Removed the following required fields from the Required Field Definitions window:

- Physician Area
- Physician Phone
- Physician Extension
120296 - Problems merging charts for patient records with iForms

Module: Maintenance ~ Chart Merge window

Problem: When merging patient charts in the Patient Merge Utility window (in Maintenance module - System tab - Merge Charts tab), if both patient records contain iForms, axiUm displays an error and the merge process is incomplete.

Solution: Fixed so that in the above scenario, axiUm no longer displays the error message.

Ortho Manager

120019 - Appointment request date not honored

Module: Ortho Manager ~ Ortho Appointment Request window

Problem: If you submit an appointment request from the Ortho Manager module that includes values in the Stage drop-down field and a future date in the Date field, the Scheduler module’s Appointment Expert window does not honor this date (it defaults to the current date).

Steps to replicate:

1. Open the Ortho Appointment Request window.

   Go to Ortho module - Ortho Treatment History - Ortho Tx History window - (Next Appt).

2. In the Stage drop-down field, select an option.

3. In the Date field, enter the current date.

4. In the Weeks field, enter 4. This sets the Date field to four weeks from the originally selected date. For our example, this sets the date to 16/11/11.
5. Click the Accept button.

axiUm saves the changes, closes the Ortho Appointment Request window, and return to the Ortho Tx History window.

6. Open the Appointment Expert window.

Go to Scheduler module - (Rolodex) - Rolodex (Select Patient) window - select a patient - Patient Appointments window or Family Appointments window - highlight a record - Schedule w/ Expert button.

Note: Accessing this window through other methods (e.g. Scheduler module - (Lists) - Appointment Lists window - run a search - highlight a record - Schedule with Expert right-click option) works fine.

In the Date Range section, the From date displays today’s date. It should display the date indicated in the Ortho Appointment Request window (i.e. 16/11/11).

**Solution:** Fixed so that in the above scenario, axiUm displays the date as displayed in the Ortho Appointment Request window’s Date field.

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**Patient Card**

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**119343 - Deleted primary physician still displays**

**Module:** Patient Info window - Clinical tab

**Problem:** If you go to the Patient Physician section add a primary patient physician to the selected patient’s record, the physician also displays on the Patient Card window, and this is fine. However, if you remove this physician from this patient’s record, the physician still displays on the Patient Card window.

**Solution:** Fixed so that removing a patient physician from the Patient Info window also removes it from the Patient Card window.
119346 - Cannot add physician to new patient records

Module: Patient Info window - Clinical tab

Problem: If you make the physician name a required field (in Maintenance module - Basic tab - Required Fields icon - Required Fields window), and you try creating a new patient record, axiUm displays the message, "Field must have a value", and you are unable to add any new patients from this point. This is because you must save the patient record to add a physician (axiUm displays the Clinical tab after saving), at the same time, you must add a physician to save the patient record (field requirement rule).

Solution: Now you can initially save a new patient record with no physician. Subsequent saves require you to add a physician to this patient record.

119761 - Incorrect error message when adding patient records

Module: Patient Info window - Add Patient window

Problem: This problem applies only to version 5.00.10. When you open the Patient Info - Add Patient window to add a new patient record, enter all the required fields, and then click the Save button, axiUm displays the message, "Field must have a value!" When you click the OK button to close the message, axiUm still saves the new patient record as normal.

Solution: Fixed. Entering all required fields in the Add Patient window no longer displays this message.

119996 - Cannot give internet access to some patients

Module: Patient Info window - Personal tab

Problem: If you select a patient whose last name contains an apostrophe (e.g. O'Neil), and you go to Patient Info window - Personal tab - Information section - Internet Access button - Internet Access window and then click the Save button, axiUm displays a database warning.

Solution: Fixed so that axiUm allows internet access to patients whose last name contains an apostrophe.

Personal Planner

117631 - Approved EPR form showing as unapproved

Module: Personal Planner - Unapproved tab

Problem: When provider1 enters an EPR form but receives no approval, axiUm displays this EPR form in their Personal Planner window's Unapproved tab, and this is fine. Then when provider1 receives approval, axiUm removes this EPR form from their Unapproved tab, and this is also fine. However, if provider2 uses the same EPR form to enter or change an answer but receive no approval, axiUm displays this form again in provider1's Unapproved tab.

Solution: Fixed so that in the above scenario, the unapproved EPR form displays only in provider2's Unapproved tab.
### Rolodex

**119481 - Copying patient record copies mobile phone number**

**Module:** Rolodex ~ Patient Info window

**Problem:** When you copy a patient record, axiUm copies their mobile number to the new patient record. Mobile numbers are unique to the individual (as are work numbers and "other" numbers), so copying this information to the new patient is unnecessary.

**Solution:** Fixed so that when you copy an existing patient record, axiUm copies only the home phone number.

### Scheduler

**119226 - Availability Mode not showing waitlist appointments**

**Module:** Scheduler - Availability tab

**Problem:** When a patient is on a wait list, and you go to the Scheduler window - Availability tab - Active tab, the Wait List column is blank.

**Solution:** Fixed so that patients on a wait list display Yes in the Wait List column’s Active tab.
119233 - Appointment Expert displays results for clinic holidays

Module: Scheduler ~ Appointment Expert window

Problem: If you go to the Clinic Holidays window (in Maintenance module - Scheduler tab - Clinic Holidays icon) and create a clinic holiday that spans a date range (e.g. Christmas week, December 24th - 28th), axiUm considers only the first day of this date range (i.e. 24th), displaying results for the remaining days (25th - 28th).

Solution: Fixed so that the Appointment Expert window's search process considers the full date range of a clinic's holiday.

119923 - Display problems in the Active tab when no chairs reserved

Module: Scheduler - Active tab

Problem: This occurs only in version 5.00.10, when a book is defined in the Books window (in Scheduler module - Active tab - (Book) - Appt. Books window - Modify button), with the following setup:

When you view the Active tab using the book method of scheduling, and the book contains no chair reservations, the contents are compressed to the left of the appointment book.

Solution: Fixed display problem.

120353 - Appointment tooltip font size is smaller

Module: Scheduler - Active tab

Problem: When you hover over an appointment, the tooltip is displayed in smaller fonts (9pt). In previous versions, the font size was larger (11pt).

Previous: Current:
**Solution:** Fixed by increasing font size to 11pt to restore the original text size.