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47188 - Chart request & history problems

Module: Chart Tracker - Chart History tab, Chart Request tab

Issue: When a chart request is made to a location (not a specific user), the User column is blank. This can be confusing.

Enhancement: Now axiUm displays “No specific user” in the User column.

---

EHR

39059, 99842 - Mandatory progress notes

Module: EHR - Notes tab

Issue: Need the ability to make note entry mandatory per patient per provider per day.

Enhancement: In Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record) - Users window - Provider tab - Controls section, there is a Requires Non-Treatment Note on every Visit checkbox (new, this is 39059).

![Requires Non-Treatment Note on every Visit checkbox](image)

Then in the following scenario:

IF... the user does one of the following:
- in the EHR or Transactions module, they add an in-process or completed treatment
- in the EHR, Ortho, or Perio module, they have an in-process or completed treatment approved

AND...for the above treatment they did not enter *one or more* of the following:
- a general note
- a template note
THEN... when you add or approve the above treatment, axiUm displays the message, “The treatment provider is required to enter a non-treatment note for this visit but has not done so. Are you sure you want to continue?” (this message was changed, 99842)

---

### 44888 - Drop-down calendars on EPR date fields

**Module:** EHR - Forms tab  
**Issue:** Need the date entry fields to display a drop-down calendar.  
**Enhancement:** Now axiUm displays the drop-down calendar next to all date fields on all axiUm forms:

- EHR forms  
- Ortho Manager EPR forms  
- Perio EPR forms  
- Referral EPR forms  
- Provider Assignment EPR forms  
- Tx History - Tx form (right-click)  
- Patient Attachments EPR forms

---

### 45701 - Bottom scroll bar

**Module:** EHR  
**Issue:** Need a horizontal scroll bar at the bottom of the following windows:

- EHR window - Tx History tab  
- Ortho Tx History window  
- Perio Tx History window  

**Enhancement:** Now the above windows display a horizontal scroll bar.

---

### 46419 - Adding notes to medical alerts

**Module:** EHR - Alerts tab  
**Issue:** Need the ability to add a note to patient alerts.  
**Enhancement:** Now has the ability to add a note for each patient alert.

**Setup:**

1. Go to the Medical Alert Codes window (in Maintenance module - EHR tab - Medical Alerts icon).

2. In the Default Note text box (new). Enter a default note for axiUm to display when you select this medical alert. For this example, select the medical alert LBP, Low Blood Pressure, and enter “Today’s reading:”
Once you have set up the medical alert codes, you can use them in the Alerts tab and in EPR forms. The next section explains how to use medical alert codes in both cases.

Usage in Alerts tab:

1. Go to the EHR window’s Alerts tab.

2. Highlight an alert item and select the Update Medical Alerts right-click option. axiUm displays the Patient Medical Alerts window (new).

   ![Medical Alert Codes window]

   ![Patient Medical Alerts window]

   Note: The Update Medical Alerts window is deprecated; this window no longer exists in axiUm.

3. In the Alert Code field, enter LBP. axiUm defaults the Note text box to the default note entered in the setup.
4. In the Note text box, complete the default note. For this example, we will enter 90/60.

5. Click \(\text{(Add a new Record)}\). axiUm adds the record to the list view.

Usage in EPR forms:

1. Go to the EHR window’s Forms tab.

2. Add an EPR form.

3. When you answer a question associated to a medical alert, axiUm does one of the following:

   - If you set up the EPR form so that axiUm prompts the medical alert: axiUm displays the Add Alert Question window. The Note text box displays the default note created in the setup. For this example, we will complete the note by entering 90/60.
If you set up the EPR form so that axiUm automatically adds the medical alert: This medical alert is automatically added to the EHR window’s Alerts tab. This method does not give you the opportunity to edit the note; axiUm adds the default note you entered in the setup. To update the note, select the right-click Updated Medical Alerts option to display the Patient Medical Alerts window, and make changes there. For this example, we will complete the note by entering 90/60.

Note that if the patient already has an alert, and you try adding the same one, axiUm asks for confirmation before duplicating the alert.

Similar changes made to patient needs:
When you answer an EPR form question associated to a patient need, axiUm displays the Add Alert Question window. Because patient need codes, unlike medical alert codes, cannot have pre-defined default notes, you can manually enter the entire note at this time.

---

**49699 - EPR questions display instructions**

**Module:** EHR - Forms tab  
**Issue:** Need the ability to display instructions on form questions.  
**Enhancement:** Now you can display general instructions about the form, as well as specific instructions for each question within that form.

To set up general instructions for forms:

1. Access the Form Instructions window by clicking (Form Instructions), using one of the following methods:
   - EPR Form Setup (in Maintenance module - EHR tab - EPR Form Setup icon)
   - Ortho Form Setup (in Maintenance module - Ortho tab - Ortho Form Setup icon)
   - Perio Form Setup (in Maintenance module - Perio tab - Perio Form Setup icon)
   - User Form Setup (in Maintenance module - Office tab - User Form Setup icon)

2. In the Instructions text box, enter instructions for the selected form.

To set up specific instructions for questions:

1. Access a form page definition window by clicking (Form Page Definition) in the following windows:
2. Click (Form Instructions) to display the Form Instructions window.

3. In the Instructions text box, enter instructions for the selected item (e.g. a heading, a question, a checklist item, or additional information).

Usage:

In the EHR window’s Forms tab, when you add a form, the Add Form window displays a disabled Instructions text box (new) showing the instructions entered in the form setup above.

Then, by highlighting an item (question) from the list view and right-clicking, axiUm displays the following new options:

- Show Form Instructions (new): This right-click option displays the general instructions for the form. This displays the same information as in the Add Form window.
- Show Instructions (new): This right-click option displays the instructions for the highlighted question (if applicable).

54078 - EHR tab indicator for empty form pages

Module: EHR - Forms tab

Issue: Need axiUm to indicate that a form page is empty (no answers have been entered).

Enhancement: Now axiUm indicates empty form pages containing no answers by displaying the form page tab in gray text. If a form page contains answers, the tab displays in black text.

The following additional displays are also available on form page tabs:

- Blue text: Indicates this tab contains unapproved answers.
- Exclamation mark (!): Indicates this tab contains required answers not yet provided.

61909 - Re-activating inactive planned treatments

Module: EHR - Tx History tab

Issue: Need the ability to re-activate inactive planned treatments (displayed on the treatment line as: P*) through the EHR module’s Tx History tab.
**Enhancement:** Now has the ability re-activate inactive planned treatments through the EHR module’s Tx History tab. To re-activate planned treatments:

1. Go to the EHR window’s Tx History
2. Right-click and select the Re-activate Treatment option (new).
3. Swipe to approve.
   
   This sets the audit user on the treatment to the name on the swipe card.

The status and behavior of active or re-activated treatments is set up in the Practice Options window (in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window -钗 (Practice Options)), by using the Transactions Option’s **Treatment Tx Status considered inactive** checkbox and associated fields.

![Transactions Options](image)

**as:** The options displayed in this drop-down field are defined in the Status Codes window (in Maintenance module - Basic tab - Status Codes icon). After the number of days (displayed in the after __ days field), axiUm automatically de-activates the treatment record and changes the treatment status to the one displayed here.

**use:** The options displayed in this drop-down field are defined in the Status Codes window (in Maintenance module - Basic tab - Status Codes icon), but only those with the Make Treatment Inactive checkbox deselected. When you re-activate a treatment record, axiUm applies this treatment status to the treatment record you selected.

---

**62437 - Adding student evaluation**

**Module:** EHR - Tx History

**Issue:** Need the ability to enter student evaluations from the EHR module.

**Enhancement:** Now there is a right-click Add Student Eval option (new) in the following windows:

- EHR module’s Tx History tab
- Perio module’s Perio Tx History window (Perio module -钗 (Perio Treatment History))
- Ortho module’s Ortho Tx History window (Ortho module -钗 (Ortho Treatment History))
69035 - Colored alerts

**Module:** EHR - Alerts tab

**Issue:** Need the ability to define colors on alert codes.

**Enhancement:** Now has the ability to define colors for each medical alert, patient alert, and office alert. axiUm displays a Color field (new) in the following windows:

- Medical Alert Codes window (in Maintenance module - EHR tab - Medical Alerts icon)

- Alert Codes window (in Maintenance module - Patient tab - Alert Codes icon)
axiUm uses these custom colors wherever these codes show up in the application.

Note: Make sure that the colors you select stand out where they are used. Generally, primary colors are more effective than very light or very dark colors.

71426 - Associating planned treatments to disciplines

Module: EHR - Tx Plan tab

Issue: Need the ability to select a discipline for planned treatments, and the added ability to display a warning if this is not done. Currently, you can select a discipline for in-process and completed treatments (but not planned treatments).

By forcing users to associate a discipline to planned treatments, you can run reports in Info Manager and Crystal Reports and sort planned treatment by discipline, allowing you to obtain accurate treatment counts under each discipline.

Enhancement: Now has the ability to associate disciplines to planned treatments.

Setup:

1. Go to the Practice Options window (in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button - Practices window - (Practice Options)).

2. Go to the Transactions Options section.
3. The **Warn if Discipline is not entered** drop-down field (new, this used to be a checkbox) has the following options:

- **No**: This option, if selected, displays no warning when a treatment of any status has no discipline. This is the same as the previous behavior when the checkbox was deselected.

- **Yes (for I/C txs)**: This option, if selected, displays a warning when a treatment with an in-process status or a completed status has no discipline. This is the same as the previous behavior when checkbox was selected.

- **Yes (for P/I/C txs)**: This option, if selected, displays a warning if there is no discipline associated to treatments of any status, including planned status (the new feature).

The warning applies to treatments added in the Transactions module, EHR window’s Chart Add tab, EHR window’s Tx Plan tab, and during patient checkout.

---

**72762 - Hygienist/assistant entry on behalf of doctor**

**Module**: EHR

**Issue**: Need axiUm to give users the ability to enter clinical information on behalf of a provider.

**Enhancement**: Now has the ability to enter information for another provider, allowing users (e.g. hygienists) to make clinical entries (e.g. treatments) on behalf of any provider (e.g. dentists). These entries are stamped with the other provider’s name and can be set up to require approval regardless of whether the logon user normally requires approval for the specific record. Entries not associated to a provider (e.g. notes) will be stamped with the logged-in user’s name.

**Setup (for proxy user):**

1. Go to Maintenance module - Office tab - Users icon - Users List window - search for users - double-click an item - Users window - Clinical tab - Require Approval section.

2. From the **Entries on behalf of another provider** drop-down field, select one of the following options:

   - **Always req. approval**: Selecting this option indicates that when this provider enters information on behalf of another provider, this provider requires approval...
even if the checkbox items in the Require Approval section indicate approval is not required.

- Based on above options: Selecting this option indicates that when this provider enters information on behalf of another provider, this provider requires approval based on the checkbox items in the Require Approval section.

3. Click Save.
4. Go to Maintenance module - System tab - Desktop icon - Desktop Settings window.
5. Deselect the Hide Status Bar checkbox. This enables the Show Provider # static on the Status Bar.
6. Select the Show Provider # checkbox. Selecting this checkbox displays the 'on behalf of' provider’s number in the toolbar. In other words, the logon user displays as usual plus the provider he/she is entering records for will also be displayed in the status bar with an orange background.

Setup (for provider):

1. From the axiUm main screen, click the Tools menu to display a list of options.
2. Select the Entry on Behalf of Provider option (new). axiUm displays the Entry on Behalf of Provider window (new). Use this window to setup the proxy mode by selecting one of the following options.
   - Self: You are making clinical entries yourself (This would be selected to indicate you are finished entering on behalf of another provider).
   - Provider: An assistant is physically making the clinical entries on your behalf. The field indicates the provider number of the assistant who is doing this. This is the provider you are entering records for.
3. Click OK.

Note: The 'on behalf of' setting is lost when the user closes axiUm.

---

77154 - Need a Unit field

**Module:** EHR - Chart Add

**Issue:** Currently there is no way to specify the number of units for treatments entered in the EHR module, and axiUm does not set the value to the default number of units set up in the procedure code.

**Enhancement:** There is a Unit field (new) in the following windows:
- EHR module - Chart Add tab - Details tab
- EHR module Tx Plan tab - Details tab
- Edit In Process Treatment window
- Edit Planned Treatment window
- View Treatment window
- Edit Completed Treatment window
- Add Treatment window
- Add Ortho Visit / Ortho Treatment window
- Edit Planned Ortho Treatment window
- Edit In Process Ortho Treatment window
- Edit Completed Ortho Treatment / Ortho Visit window
- View Ortho Visit / Ortho Treatment window
- Treatment Macro Processing window
- Tx Plan Macro Processing window
- Complete Treatment Review window

After a treatment is submitted, you cannot change this value.

The Unit field affects the treatment total for procedure codes that have been set up with factor units. In other words, in Maintenance module - Clinical tab - Procedure Code icon - Procedure Code List window - run a search - select a record from list view - (Modify Record) - Procedure Code window - Options section, the Factor Units? checkbox is selected and the field displays a value.

For other procedure codes, the unit field is enabled but it does not affect the amount charged for the treatment.

---

79755 - Defining incompatible procedures

**Module:** EHR

**Issue:** Need the ability to define incompatible procedures.

**Enhancement:** The Procedure Code window has a Limits button (new). Clicking this button displays the Procedure Code Limits window (new).

![Procedure Code Limits](image.gif)

Use this window to define procedure limitations.

- Limit on the number of times this procedure can be performed per visit (e.g. 2 x D0340)
- As above, but limited per patient per tooth (e.g. 1 x D2161)
- Procedure requires a previous procedure to be added (D0230 has prerequisite D0220)
- Procedure is incompatible with another procedure entered today (D0150 and D0120, D0130, etc.)

Clicking the Incompatibilities button displays the Selecting Procedures (Incompatible) window (new):
When you add an incompatible procedure using the status in-process or status complete (in either the EHR, Ortho, or Transactions module), axiUm notifies you that the procedures entered are incompatible.

---

**84954 - Chart Add is slow**

**Module:** EHR - Chart Add tab  
**Issue:** When you add a single planned treatment, axiUm is slow.  
**Enhancement:** Improved the speed of adding a single planned treatment.

---

**84993 - Clinical notes**

**Module:** EHR ~ General Note window, Template Note window, SOAP Note window  
**Issue:** Need the ability for the note windows to remain displayed while performing another action (e.g., displaying radiographs, or opening other modules). Currently, you must close the note window before performing another action.  
**Enhancement:** Note windows can now remain displayed while you perform another action, even with a different patient.

---

**85786 - Sort planned treatments with appointments**

**Module:** EHR - Tx History tab  
**Issue:** Need the ability to display planned treatment with any associated planned appointments.  
**Enhancement:** Now has the ability to display planned treatment with any associated planned appointments.

**Setup:**

1. Go to the EHR Options window (in EHR - \(\text{Options/Settings}\)).
   Alternately, you can go to the Treatment History Views window (in Maintenance module - EHR tab - Treatment History Views icon).

2. Click on the Tx History tab.

3. In the Display Options section, select **Show appointments** checkbox. This enables the **List tx by appointment** checkbox.
4. In the Sort Options section, select the following checkboxes:
   - **Sort planned activity to the end of the list** checkbox
   - **List txs by appointment** checkbox (new).

5. Click OK.

Usage:

In the EHR module’s Tx History tab:
   - The planned treatment displays under their associated appointment.
   - If a planned treatment is associated to multiple appointments, it displays under all associated appointments.
   - Completed treatments displays as strike-outs.

---

**85843 - Macro entry for recalls**

**Module:** EHR - Chart Add tab

**Issue:** Currently, if the logged-on user adds a macro code containing a procedure code they cannot access, that code would not display in the macro list. This prevents hygienists from entering macro codes containing dental codes. Need the ability for macro procedure codes to prompt based on provider so that hygienists can enter macro procedures on behalf of dentists.

**Enhancement:** Now has the ability for macro procedure codes to prompt based on provider.

**Setup:**

1. Go to the Procedure Macro Codes window (in Maintenance module - Clinical tab - Procedure Macro Codes icon). The following changes have been made:
   - **Review Macro procedure codes at time of entry** checkbox (new):
     - If you deselect this checkbox, you cannot make changes to the individual treatments in a macro code.
- If you select this checkbox, adding a macro from the EHR module’s Chart Add tab displays the Treatment Macro Edit window first, allowing you to add/modify/delete individual macro treatments and change quantity of each code.

- **Review treatment details at time of entry** checkbox (new): This used to be called the Treatments can be reviewed and modified at time of entry checkbox.
  - If you deselect this checkbox, when axiUm displays the Treatment Macro Processing window, the procedure codes begin an auto-add process.
  - If you select this checkbox, this window opens and allows for changes to the details before clicking the Continue button to start the auto-add process. When you click the Continue button, if there is a procedure code in the list that the logged-on user (i.e., hygienist) does not have access to, they can update the provider field to be the dentist, which will allow the process to continue. If this is not done before clicking the Continue button, axiUm stops the user (preventing treatments from being added) until this problem is fixed.

2. Click 

### 87241 - Hygienist access to planned treatments, blank Provider field

**Module:** EHR - Chart Add tab

**Issue:** Need the ability for a logged-on hygienist to enter planned treatments for which they have no access to. Currently, doing so displays the message “No access to procedure”. Also need the ability to leave the Provider field blank.

**Enhancement:** Now axiUm allows a logged-on hygienist to enter planned treatments they have no access to, with the added ability to leave the Provider field blank.

### 88319 - Change sorting behavior of clinic notes

**Module:** EHR - Tx History tab

**Issue:** axiUm always displays treatment note records with the associated treatment record. If you set up the sort order by treatment date but hide the treatment records, only the associated notes display, but now the sort order is in disarray. This issue also exists in the Ortho module’s Tx History window and the Perio module’s Tx History window.

**Enhancement:** The following new options have been added:

A **Sort treatment notes under each treatment** checkbox (new) has been added to the following windows:

- Tx History Views window  
  (in Maintenance module - EHR tab - Treatment History View icon)
- EHR Options window’s Tx History tab  
  (in EHR module - (Options/Settings))
5.0 Enhancements

Enhancements

- Tx History Options
  (in Ortho module - Ortho Treatment History) - Ortho Treatment History window - (Options/Settings)
- Tx History Options
  (in Perio module - Perio Treatment History) - Perio Treatment History window - (Options/Settings)

Then when you go to the Display Options section and select the **Show notes** checkbox, axiUm automatically selects the **Sort treatment notes under each treatment** checkbox (resulting in the original sorting rules). If you deselect the **Sort treatment notes under each treatment**, axiUm sorts the note based on the setup in the Sort Options section (see below), regardless whether or where the associated treatment is displayed in the list.

In the Sort Options section’s Secondary drop-down field and the Tertiary drop-down field, an **Entry Time** option (new) is displayed. This sorts the list by both entry date and time.

![Sort Options](image)

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**99834 - Visual indicators for alert notes**

**Module:** EHR - Alerts tab

**Issue:** In the Medical Alerts section, when a medical alert record contains notes, there is no visual indication that these notes exist.

**Enhancement:** When a medical alert record contains notes, axiUm displays a visual indicator beside the alert item. You can also now double-click (new ability) on the medical alert record to display the Patient Medical Alerts window, rather than by selecting the Update Medical Alerts right-click option.

Both the visual indicator and the right-click ability is also available in the following sections of the Alerts tab:

- Patient Alerts section: Double-clicking a record displays the Patient Info window’s Codes tab.
- Patient Needs section: Double-clicking a record displays the Patient Info window’s Codes tab.

The visual indicator (but not the double-clicking ability) has also been added to the records in the Problems tab.

The double-clicking ability (but not the visual indicator) has been added to the Alerts tab’s Patient Summaries section. Double-clicking an item displays the Patient Summary Override window.
24106 - Single & multiple logon option

Module: Logon

Issue: For institutions that allow multiple logon sessions, there is a need for the ability to prevent users from logging onto multiple sessions of axiUm.

Enhancement: Now if your institution allows multiple logon sessions (in your axium.ini file the [Office] section displays BlockMultiExe=0), axiUm has the ability to prevent user levels from logging onto multiple sessions of axiUm.

In the Power Admin module, go to File menu and click the Levels option to display the Levels window. There is a **Users restricted to one axiUm/Power Admin session** checkbox (new).

Selecting this checkbox restricts users of this level to single-session logons. This applies to both axiUm and Power Admin logons.

When a user of this level tries opening multiple sessions, axiUm displays the following message:

- **Continue**: Clicking this button allows the user to continue with this new session.
In the event that a user requires multiple logons temporarily (e.g., they left their axiUm session at home logged on and is now trying to log on to axiUm at the clinic), you can release them from this single-session restriction by going to the Users window and clicking the **Remove Login Restriction** button (new). This allows the user multiple logins for the current day only. axiUm audits the user that released this user from this single-session restriction.

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### 38790 - Switching users

**Module:** Logon  

**Issue:** Need the ability to switch users while running axiUm so that administrators can perform tasks that regular users cannot, while keeping the currently selected patient on the screen.  

**Enhancement:** Now axiUm has the ability to switch users. In the Tools menu, there is a **Switch User** option (new). Selecting this option displays the Switch User window (new).

Keep currently selected patient: Selecting this checkbox retains the currently selected patient for the next user. If the next user does not have access to this patient, axiUm displays an error message.

Note: axiUm audits the action as the administrator, not the current user.
Note: The absence of a Cancel button is a security feature. When the administrator enters their ID and password in the Switch User window, performs the necessary work, and then returns to the Switch User window for the original user to log back in, that user can click the Cancel button (if there was one) and continue working as the administrator. The absence of a Cancel button eliminates this from happening.

49796 - Default practice, facility, & clinic
Module: Logon
Issue: Need the ability to set the practice, facility, and clinic, during axiUm login. Currently axiUm lets you define these as workstation defaults. However, in the case with laptops, students need the ability to set these values based on their location at that time.
Enhancement: Now has the ability to set the practice, facility, and clinic during axiUm login.

Go to the Desktop Settings window (in Maintenance module - System tab - Desktop icon).

There is a Change Station Defaults During Log On drop-down field (new). The default option is set up in Maintenance module - System tab - Station Options icon - Station options window, in the General section - Office section - ChangeStationDefaultsAtLogon option.

This drop-down field displays the following options:

- **No**: This sets the current behavior. axiUm uses the workstation defaults set up in the Station Options window.
**Optionally Change at Log On:** This gives you the option to change your workstation’s default setting during axiUm login. The User Log On window displays a Change Station Defaults checkbox (new). Selecting this checkbox displays the Set axiUm Defaults window (new) upon successful login (more on this window later). Not selecting the Change Station Defaults checkbox skips the Set axiUm Defaults window, and retains the workstation’s defaults.

**Always Change at Log On:** After logging on, axiUm displays the Set axiUm Defaults window (new), and the Change Station Defaults checkbox is hidden.

Once you successfully log on, axiUm automatically displays the Set axiUm Defaults window (more on this window below).

**Set axiUm Defaults window:**

Either axiUm will automatically display this window during login, or you can open it anytime during your session by going to the Tools menu and selecting the Set axiUm Defaults option (new).

This window displays the default values set up for this workstation. You can change these values. The next time you log on to this workstation, axiUm will use these values as the new default.

Use this window to set the defaults practice, facility, and clinic.
- **Practice:** This drop-down field displays all practices, as defined in the Practices window (in Maintenance module - Office tab - Practice Address icon - Practice Address window - Practice button). This drop-down field defaults to the practice displayed in the Practice Address window.

- **Facility:** This drop-down field is enabled if the Work Station Facility Override checkbox is selected (in Transactions module - , (Options/Settings) - Transaction Option window - Miscellaneous section). This drop-down field defaults to the option selected in the field beside the above checkbox.

- **Clinic:** This drop-down field displays all clinics that the logged on user can access, as defined in the User Accessibility for Clinics window (in Maintenance module - Scheduler tab - Clinics icon - Clinics window - , (User Access)). This drop-down field defaults to this workstation’s default clinic (in Maintenance module - System tab - Station Options - Station Options window - General section - Office section - Default Clinic).

Note: If you want the practice associated to the Transactions module or the Patient Approvals window to remain *unaffected* by the settings in the Set axiUm Defaults window, go to the Transactions Options window (Transactions window - , (Options/Settings)) and deselect the Workstation Practice Override checkbox.

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**52197 - Log on window**

**Module:** Logon

**Issue:** When auto-logout occurs, need the ability to also logout the current user and display the User Authentication window so a user (same or different) can quickly log on to axiUm again.

**Enhancement:** In the Desktop Settings window (in Maintenance module - System tab - Desktop icon), there are exit settings to indicate whether axiUm will exit or logout, depending on the situation defined here:
**Auto Exit Work Station Override:** This checkbox was previously called Auto Logout Station Override. Selecting this checkbox indicates axiUm exits the session using the method indicated (in the Exit Method drop-down field, explained later) when one of the following occurs:

- User clicks (close) on the main application screen
- User selects the Actions menu - Exit option
- User selects the Tools menu - Log Off option (new)

**Auto Exit (in min.):** This new field indicates the number of minutes before axiUm exits the session using the method indicated (in the Exit Method drop-down field, explained below).

**Exit Method:** This new drop-down field indicates axiUm’s exit behavior when the above occurs, and displays the following options:

- **Close Application:** If this option is selected, when the time displayed in the Auto Exit (in min) field is reached, axiUm closes the application.
- **Log Off:** If this option is selected, when the time displayed in the Auto Exit (in min) field is reached, axiUm logs you off, leaving the application running but displaying the User Log On window for another user to log on.

**Auto Close Log On (in min.):** When the User Log On window is left open on the main application screen, this new field indicates the number of minutes before axiUm automatically closes the User Log On window. This prevents excess database connections remaining open.

Note: This enhancement did not consider the use of Active Directory. If you are using Active Directory, see item 97039 in the 5.00.03 and 5.10 Bug Fixes document.
62976 - Default number of seconds on re-swiping card

**Module:** Error Messages  
**Issue:** When you use a swipe card and the swipe fails, you must either click the OK button on the message window or press the Enter key before re-swiping your card. Need the ability to re-swipe without having to do this.

**Enhancement:** You now have the ability to set a default number of seconds before the message window closes. This is set up in Maintenance module - System tab - Station Options icon - Station Options window, and selecting General - Desktop - AuthErrorDelay (new). If you set this option to 0 seconds, the message window never times out, and you must always click the OK button or press the Enter key before re-swiping.

Note: This timeout applies everywhere in axiUm where the User Authentication window is displayed, (e.g., login, checkout, form approval, evaluations). It does not apply when you log on to the Power Admin module.

63941 - Administrators logging on as users

**Module:** Logon  
**Issue:** Need the ability for administrators to logon as a different user without entering that user’s password. Currently, logging in as the administrator lets you see everything, but if you are troubleshooting, you want to see only what that user sees.

**Enhancement:** Now has the ability for an administrator to log on as a user. For example, if a user cannot write off more than $, an administrator can log in as that user and write it off on their behalf.

In the Tools menu, there is a Log on As User option (new). Selecting this option displays the Log On window (new):

Note: axiUm audits the action as the original user, not the administrator.

Note: The administrator using this mode cannot perform prescription-type tasks in axiUm or send messages using the Messenger module.

73269 - Disable multiple logons on a workstation

**Module:** Logon  
**Issue:** Need the ability to allow only one logon per workstation at any one time.

**Enhancement:** axiUm now disallows multiple logons as the default behavior. To allow multiple sessions, you must add the following line to the axium.ini file in the Office section: BlockMultiExe=0.
76489 - Login message

Module: Login

Issue: Currently, when you try logging into axiUm outside the allowable access time for your user level (defined in Power Admin module - File menu - Users option - Users window - Hours button - Logon Hours window), and:

- You login at a time earlier than allowed, axiUm displays the message, “User access is not yet effective.”
- You login at a time later than allowed, axiUm displays the message, “User access has expired.”

Need to change these messages so that their meaning is clear.

Enhancement: Now if you try logging in outside the allowable access time for your user level, axiUm displays the message, “User access not valid for this time period.”

82020 - Updated interface

Module: GUI

Issue: Need to update the appearance of the axiUm interface.

Enhancement: Now made the following changes to the axiUm interface when used with Windows 7 or Windows Vista:

- Windows: blue backgrounds
  
  Current: ![Current Window](image1)
  
  New: ![New Window](image2)

- Toolbars:
  - Updated icons. For example, ![Updated Clear Data](image3) updated to ![New Clear Data](image4).
  - Changed grey background of some icons.
  - Changed grey background of status bar.

- Calendar drop-down fields: gradient background; displays dates from previous/next month. For example:

  Current: ![Current Calendar](image5)
  
  New: ![New Calendar](image6)
• Stickies icon: Moving hand replaced with a standard mouse pointer.

Current: 

New:

• Maintenance module: Removed ball icon from tabs.

Current:

New:

Note: axiUm has retained the “classic” interface, for those who prefer it (see 97444).

82349 - Storing photos in temporary file

Module: GUI

Issue: Currently, when you open a patient record containing a photo, a file is written to your workstation’s local temp folder along with the image. This violates HIPAA regulation.

Enhancement: Now patient and user photos are no longer stored in your workstation when you view windows that display them. These windows are:

• Rolodex window
• Patient Card window
• Patient Info window
• Transactions window’s General tab
- EHR window's odontogram (full screen)
- Users List window (maintenance)
- Users List window (search)
- Users window Personal tab
- Providers List window
- Student List window
- Periodic Evaluation window

**84113 - Beep not supported in Windows 7**

**Module:** Error Messages

**Issue:** The beep function in WINAPI is no longer supported in Windows 7. Need the ability to change the beeps.

**Enhancement:** Now has the ability for all operating systems to use *.wav files to represent successful and failed scan beeps. The *.wav files are stored in the run folder, and you can use any sound you want. For example, you may want to use different successful/failed scan beeps for each workstation located in the same room so that you can identify your beeps from other workstations' beeps. The *.wav files can be applied to the Chart Tracker module, the Dispensary module, and the Inventory module.

**Setup:**

1. Make sure you have the following *.wav files in your run folder (located in the RequiredFiles folder):
   - pass.wav
   - fail.wav
   - na.wav ("not applicable", used in inventory usage adjustment for products whose usage is not tracked.)
2. Go to Maintenance module - System tab - Station Options icon - Station Options window.
4. Select one of the following options:
   - 0 - No, use system beep (if you are using Windows 7, this is no longer supported)
   - 1 - Yes, use .wav files

**84734 - MDE interface**

**Module:** Support Issue

**Issue:** Need the ability for axiUm to interface with MDE (similar to Emdeon) for claim processing.

**Enhancement:** Now axiUm interfaces with MDE.

**85082 - User ID in Estimate report**

**Module:** Crystal Reports

**Issue:** Need to display the currently logged-in user's ID in the estimate report (estimate.rpt).

**Enhancement:** A new UserId parameter is passed to the estimate report and set with the User ID of the currently logged in user.
85107 - Improve interface for disabled features
Module: GUI
Issue: Need to improve the interface for disabled features.
Enhancement: The following changes have been made:
  - Hide disabled menu items - based on Station Option: General - Menu - HideDisabledMenus
  - Hide disabled toolbar items - based on Station Option: General - Toolbar - HideDisabledToolbars
  - Hide tabs:
    - Transactions tabs - in Power Admin Dialogs section
    - Maintenance tabs - in Power Admin Menu Items section
    - Info Manager tabs - in Power Admin Menu Items section
  - Field prompts (statics) - all added to Power Admin Dialogs section
  - Group boxes - automatically hidden if no enabled controls exist within it
  - Register.exe to disable optional features

85934 - Washington Medicare NPI & SITE ID
Module: Administrative
Issue: To accommodate different billing doctors in the same office, EDI claims need to specify the Billing Doctor's Office ID instead of the Practice Office Id
Enhancement: An Office ID field has been added to the Billing Number window (in Maintenance module – Insurance tab – Insurance Companies icon – Insurance Companies List window – Insurance Companies window). This number will print in the Billing Details REF*G5 segment. If it has not been specified, the Practice Office ID will print in this segment.

* This is only applicable to Medical and Dental EDI claims. It does not apply to Institutional claims.

* In 5010 formats, the REF*G5 segment is not required. In Station Options | Maintenance | EDI Claims, 2 new Station Options have been added to ‘turn on’ this segment for 5010 if needed (X12N50DenReqSiteID and X12N50MedReqSiteID).

87795 - New encryption methods
Module: General
Issue: Need a more secure encryption method. Current method is with Cipher Block Chaining (CBC).
Enhancement: User passwords can now optionally be encrypted with a new encryption method, AES-256 with (CBC) hashed with SHA-256.

In Maintenance module - System tab - System Options icon - System Options window - System Options section, there is a Use Advanced Encryption checkbox (new).

Once you select this checkbox, the changes cannot be reversed (i.e. cannot be decrypted). The Password fields (both) and the Swipe PIN field in the User window’s Personal tab’s Account section is converted to using full field of bullets, regardless of the true length of these values. If a user forgets their password, you can reset it to a different value directly in these fields.

For effects of advanced encryption on the use of MiPacs, see 98977.

87845 - Remove unused code
Module: Database
Issue: Need to remove unused code Users.UserType from tables.
Enhancement: This is now removed from axiUm tables.

92745 - New overnight script
Module: Support Issue
Issue: Need an overnight script so that active patients assigned to primary provider type J changes the Provider Assignments window's Schedule Hygiene with drop-down field option to the Assigned hygienist or same provider type option.

Enhancement: Created a new overnight script to do this.

92778 - Charge office visit fees when $0 total
Module: Database
Issue: A patient is charged an office visit fee ONLY if their insurance coverage includes office visit fees, AND their treatment was partially covered by this insurance.
Enhancement: Now if the procedure total is $0 (i.e., fully covered by insurance), axiUm charges an office visit fee.

94583 - Sticky note controls
Module: Sticky Notes
Issue: Need the ability to control sticky note usage.
Enhancement: Now has the ability to control sticky note usage by type (sticky note location) and by user level. In the Power Admin module's Menu Items section, there are two new items:
- Stickies (View) (new): Checkboxes selected indicate that this user level can view sticky notes displayed in these areas of axiUm.
- Stickies (Add/Edit/Remove) (new): Checkboxes selected indicate that this user level can add, edit, or remove sticky notes in these areas of axiUm.

Note: If a user level is set up to NOT view a note type, but HAVE the ability to add, edit, or remove this note type, a user of this level can open the Stickies window to create that note (the add/edit/remove ability), but cannot reopen the Stickies window to change what they originally wrote (the view ability).

### 97444 - Using “classic” axiUm interface

**Module:** GUI  
**Issue:** axiUm’s interface has been updated (82020) but need the ability to continue using the old interface.  
**Enhancement:** Now has the ability to continue using the “classic” axiUm interface.

Go to Maintenance module - System tab - Desktop icon - Desktop Settings window

![Desktop Settings](image)

**Classic Background Colors:**

- Selecting this checkbox uses the “old” (pre-5.00) background colors. For example, the Transactions window’s background will look like this:

![Transactions](image)

- Deselecting this checkbox uses the “new” (5.00) background colors. For example, the Transactions window’s background will look like this:
Classic Tab Colors:

- Selecting this checkbox uses the "old" (pre-5.00) tab colors. For example, the Transactions window’s tab colors will look like this:

- Deselecting this checkbox uses the “new” (5.00) background colors. For example, the Transactions window’s tab colors will look like this:

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**Info Manager**

**48369 - Selection list windows re-designed**

**Module:** Info Manager - Practice tab

**Issue:** There are two windows:

From the Category section, double-click the Bank Deposit Report category - Bank Deposit window - By Bank option - (ellipsis) - Select Banks for Bank Deposit window.
From the Category section, double-click the Insurance A/R category - Print Insurance A/R window - Insurance Company field (ellipsis) - Include Insurance Companies window.

Both windows are used to add/delete items to/from the list. It would be easier if we used a left/right panel to view possible selection on one side and view selected items on the other side.

**Enhancement:** Re-designed these two windows:

Select Banks for Bank Deposit window: Include Insurance Companies window:
53131 - Additional files in appointment reports

Module: Info Manager - Appointment tab

Issue: Need the Report Definition window's Files list box to display additional files for different appointment report categories.

Enhancement: The following additional files have been added to various appointment report categories.

The Policy file, the Insurance file, the Employer file, and the Patient Dependent file are available in the following appointment report categories:

- Appointment
- Appointment Procedures
- Wait List
- Chair Reservations
- Patients With Recalls
- Patients With No Active Recalls
- Preventive Care

The Instructor file and the Instructor Details file are available in the following appointment report categories:

- Appt Procedures

The Chair Supervisor file and Chair Supervisor Details file are available in the following appointment report categories:

- Appointments
- Wait List
- Chair Reservations

82294 - Need more tables in patient reports

Module: Info Manager - Patients tab

Issue: There is a need for patient reports to have access to more tables.
Enhancement: Many new tables are now available for patient reports.

87130 - Need more Info Mgr fields in guarantor statements
Module: Info Manager - Billing tab
Issue: The guarantor statements (in Info Manager module - Billing tab - Guarantor Statements category - Search button - right-click - Edit Report option - Report Definition window - Guarantor files) lists a limited number of patient fields.
Enhancement: Added more patient fields to the guarantor statements.

Maintenance

52604 - OCR on Denti-Cal Claims
Module: Maintenance ~ Station Options window
Issue: Need the ability to display characters in upper case and dates in 6-digit format.
Enhancement: Now has the ability to display characters in upper case and dates in 6-digit format.

Go to Maintenance module - System tab - Station Options icon - Station Options window. Select the Maintenance section - Claim section - DentiCalOCRFormat. In the Default field, enter 1.
57827 - Default Clinic for Recall when triggered from procedure code

Module: Maintenance ~ Patient Recall Controls / Defaults window.

Issue: When a recall is added (optional, required, or automated), it would be helpful if users can set the default clinic in the Patient Recall Controls / Default window.

Enhancement: In the Recall Controls / Defaults window (in Maintenance module - Clinical tab - Procedure code icon - Procedure Code List window - run a search - (Edit Record) - Recall Info button), it now has a Clinic drop-down field (new).

This clinic will be used to default the clinic on the recall.

If you select the User's Default Clinic option, axiUm uses the default clinic specified in the logged-on user's record. The logged-on user's default clinic is shown in the User Clinics window (in Maintenance module - Office tab - Users icon - Users List window - run a search - select record from list view - (Edit Record) - Additional tab - Clinic button).

67265 - Coverage Template window to sort data

Module: Maintenance ~ Coverage Template List window

Issue: In the Coverage Template List window (in Maintenance - Insurance tab - Coverage Templates icon), need the ability to sort the list view by column heading.

Enhancement: The following changes have been made:

- To sort the list view, click the Code column or the Description column.
To revert to the original order, click the Reset button (new).

To move items in the list, highlight an item in the list view and enter an existing code in the Move To field (new). axiUm moves the highlighted item below that code.

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### 68448 - Benefit plan update process made easier

**Module:** Maintenance - Insurance tab ~ Benefit Plan List window  
**Issue:** Need an efficient way to transfer all subscribers from benefit plan A to benefit plan B. This process happens regularly when a large employer switches insurance carriers.

**Enhancement:** In the Benefit Plan List window (in Maintenance module - Insurance tab - Benefit Plans icon), the following toolbar icons have been added:

- ![Create a new Record](new). Clicking this icon displays the Add Benefit Plan window (new). Use this window to create a new benefit plan (e.g. plan B) without having to attach a patient first (current behavior).

- ![Delete Record](new). Clicking this icon deletes the item highlighted in the list view. Use this icon to delete the old benefit plan (e.g. plan A).

- ![Transfer Benefit Plan Subscribers](new). Clicking this icon displays the Transfer Benefit Plan Subscribers window (new). Use this window to transfer subscribers from one benefit plan to another (e.g. from plan A to plan B).
70566 - Copying & importing user records

Module: Maintenance - Office tab ~ Provider Import window

Issue: When copying user records, need the ability to copy more field values from the source record. Also need the ability for the provider import feature to create identical user records for multiple users.

Enhancement: Two changes:

Change 1:

You now have the ability to copy user records populating additional identical values (except for password values, and you can create a temporary password). The following changes have been made in the Copy User window (Maintenance module - Office tab - Users icon - Users List window - run a search - select record from list view - (Copy User)):

Current: 

New:

Change 2:

You also have the ability to import provider records using an existing user record as a template. This saves you time when adding multiple new users at the beginning of the semester to automatically populate common fields (e.g., department information, custom fields, approval rights, grading type, current year, etc.).
79903 - Creating EOBs

Module: Maintenance - System tab

Issue: This applies only to paper-based, dual-insurance billing processes. Need axiUm’s insurance allocation process to create EOBs for the secondary insurance and auto-print them to attach to the secondary insurance company’s claim form.

Enhancement: Now when using dual insurance coverage and you submit/print the secondary claim insurance, axiUm automatically prints the EOBs.

82181 - De-activating medical diagnosis codes

Module: Maintenance ~ Medical Diagnosis Code window

Issue: Need the ability to de-activate medical diagnosis codes in the Medical Diagnosis Code window (in Maintenance module - Clinical tab - Clinical Diagnosis Codes icon - Clinical Diagnosis List window - run a search - highlight an item from the list view - (Edit Record) - Clinical Diagnosis Code window - Medical Code field - (ellipsis) Medical Diagnosis List window - run a search - highlight an item from the list view - (Edit Record)).

Enhancement: You can now de-activate medical diagnosis codes. You cannot de-activate the code if it is used as:

- A default in the Procedure Medical Defaults window (in Maintenance module - Clinical tab - Procedure Codes icon - run a search for code type CPT - highlight an item from the list - (Edit Record) Procedure Code window - Medical button).
- A default in Clinical Diagnosis Code window (in Maintenance module - Clinical tab - Clinical Diagnosis Codes icon - Clinical Diagnosis List window - run a search - highlight an item from the list view - (Edit Record)).
- An equivalent ICD-9 code in Medical Diagnosis Code window (described in Issue)

82597 - Increase field length

Module: Maintenance ~ Clinical Note Codes window, Clinical Note Template window
Issue: When you set up note codes in the Clinical Note Codes window or the Clinical Note Template window (in Maintenance module - EHR tab - Clinical Note Codes icon - Clinical Note Codes List window), the Description text box is limited to 2,000 characters. However, adding a note from the EHR, Perio, or Ortho module gives you a limit of 4,000 characters.

Enhancement: Now the Description text box in the Clinical Note Codes window and the Clinical Note Template window allows up to 4,000 characters.

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84389 - Laser-drawn HCFA forms

Module: Maintenance ~ Insurance Company window

Issue: The laser-drawn HCFA form currently prints the form and corresponding responses in red text. Because the state requires HCFA forms contain red outlines with black responses, these HCFA forms become rejected.

Enhancement: Changed the color of the *.bmp file to print red instead of black.

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96355 - ADA claim form box 24

Module: Maintenance ~ EDI Claims window

Issue: The ADA claim form box 24 (Date of Service) displays 00-00-0000. This may result in the unsuccessful processing of pre-treatment claims.

Enhancement: Now the ADA claim form box 24 (Date of Service) prints blank.

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97052 - Enhanced copy feature for provider work schedules

Module: Maintenance - Scheduler tab ~ Copy Provider Work Schedule window

Issue: Need a method of copying a provider’s entire work schedule into a new date range.

Enhancement: Now has the ability to copy a provider’s entire work schedule and all its details (e.g. ideal day settings) into a new date range. This is useful if you want to copy the fall schedule of provider1 and create the spring schedule of provider2.

Setup:
Go to the Copy Provider Work Schedule window (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - 📅 (Copy Schedule)). This window has changed.

Current:

![Copy Provider Work Schedule Window](image)

New:
Notes:
- Non-clinic times and limited appointment codes are not copied from provider to provider.
- Overlapping schedules are allowed.

97054 - Copy an individual day in a work schedule
Module: Maintenance ~ Copy Provider Work Schedule Day window
Issue: Need a way to copy a provider’s work schedule.
Enhancement: Now has the ability to copy provider1’s work schedule from one day to another, either within the same work schedule or across different work schedules. You can also copy provider1’s day schedule to provider2.

The Provider Schedule Detail window has a Copy Schedule Details icon (new), and is enabled only when the list view is empty. Clicking this icon displays the Copy Provider Work Schedule Day window (new). Use this window to copy a provider’s schedule from one day to another day.

The associated information displayed in the Provider Schedule Detail window and the Provider Ideal Day Settings window is also copied into the selected day.

This saves time spent on re-entering the same work schedule for each day of the week.

98138 - Improved provider importing
Module: Maintenance ~ Copy User window
Issue: Need to improve the current provider import process.
Enhancement: Now has the ability to import providers using a template provider. In the Copy User window (In Maintenance module - Office tab - Users icon - Users List window - (Copy User)), there is an Import button (new).
Clicking this button displays the Copy Users Import window (new).

The input file is a text file, delimited by commas, with four fields: Logon, First Name, Last Name, Provider#.

Note: If the template user is not a provider, only the first three fields are required.

99167 - Copying subscriber # when transferring benefit plans

Module: Maintenance ~ Transfer Benefit Plan subscribers window

Issue: Need the option to copy the existing subscriber number from the current plan to the new plan.

Enhancement: In the Transfer Benefit Plan subscribers window (in Maintenance module - Insurance tab - Benefit Plans icon - Benefit Plan List window - 📦 (Transfer Benefit Plan Subscribers)), there is a Keep Existing Subscriber Number checkbox (new).
Selecting this checkbox indicates that the new plan will use the same subscriber numbers as the previous plan.

Deselecting this checkbox indicates that the new subscriber number will be different. axiUm will also do the following:

- The new policy subscriber number displays "UNKNOWN".
- axiUm creates a sticky note to indicate that the patient has been transferred to a new policy and that the subscriber number requires updating. axiUm continues to display this note when you check this patient in, and also when you check this patient out. axiUm will continue displaying this sticky note until you manually remove it.

100378 - Change wording on warning message

Module: Maintenance ~ Station Options window

Issue: In the Station Options window (in Maintenance module - System tab - Station Options icon), if you make changes and then close this window, axiUm displays the following window:

Need to change this wording to reflect axiUm’s new ability to log on/off (without exiting). For information on the new log on/off ability, see 52197.

Enhancement: Now in the above scenario, axiUm displays the message, “Warning: For Station Option changes to take effect, the applicable workstations must either exit and restart the application, or log off and log back on.”
Ortho Manager

83661 - Approval of ortho notes
Module: Ortho Manager
Issue: The approval of ortho treatment notes should be based on the user’s treatment approval settings. Retain the existing rule that approval of ortho treatment notes is not dependent on the user’s note approval settings.
Enhancement: The approval of ortho treatment notes is based on the user's treatment approval settings. In the approval windows, only the treatment is shown, but in the note approval windows you can review the associated treatment note.

Patient Attachments

45946 - Attachment description
Module: Patient Attachments
Issue: When printing an estimate from the EHR module - Tx History tab, a copy is saved in Patient Attachments module. These attachments are displayed on the list view as, "Consent for estimated treatment". Need to display the actual title entered on each estimate.
Enhancement: The attachment title is now displayed in the list view. If the title is blank, the description displays "Consent for estimated treatment".

56950 - Expiry date on consent forms
Module: Patient Attachments
Issue: Need the ability to require or default an expiry date on consent forms.
Enhancement: Now has the ability to make the expiry information required for entry. In Maintenance module - EHR tab - Consent Codes icon - Consent Codes window, the following items are new:

- Default Expiry field (new) and drop-down field (new): These fields indicate the default expiry date in days, weeks, or months. For example, 3 Months.

- Expiry Required (new): This checkbox, if selected, indicates that you must enter an expiry date at the time you save this consent on record.
85130 - Single-scan attachments saved as *.tif files

Module: Patient Attachments

Issue: In some states, the law requires that scanned documents (including image files) must be stored in *.tif format. Need the ability for axiUm to scan single-page, scanned attachments in *.tif format. Currently axiUm saves multi-page, scanned attachments in *.tif format, but not for single-page documents.

Enhancement: Now axiUm has the ability to save scanned files in *.tif format.

You can set this up using one of the following methods:

- Through the Maintenance module, for administrators who may want to set the default for multiple workstations
- Through the Rolodex module, for axiUm users who want to set the default on this workstation only

Note: Setting up the default in one module automatically updates the default in the other module.

Setup through the Maintenance module:

1. Go to the Maintenance module - System tab - Station Options icon - Station Options window.
2. Go to Patient / Rolodex - Card - ScanDirectFormat (new) Use this station option to set the default file format:
   - 1 - JPEG: This is the axiUm default. Select this to save single-page, scanned documents as *.jpg files
   - 2 - TIFF: Select this to save single-page, scanned documents as *.tif files

Setup through the Rolodex module:

1. Go to the Rolodex module - Patient Card window - (Options/Settings) - Patient Options window.
2. From the **Scan Direct Format (single page attachments)** drop-down field (new), select the TIFF option (default is JPEG).

![Image of Scan Direct Format settings]

Note: Multi-page scanning always uses TIFF, selecting JPEG in this drop-down field does not affect it.

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**Patient Card**

**45342 - Multiple Patient physicians**

**Module:** Patient Card - Clinical tab

**Issue:** Need the ability to enter multiple physicians for patients.

**Enhancement:** Now has the ability to enter multiple physicians.

**Usage:**

1. Go to the Patient Info window's Clinical tab. This tab has been rearranged.
   
   Note: Patient Physician section no longer displays the Phone# fields here.

2. In the Patient Physician section, click \[\ldots\] (ellipsis). axiUm displays the Patient Physicians window (new).
Use this window to add referrals to the selected patient record.

The physician record with the Is Primary checkbox selected will display in the Patient Card window. If no physicians have this checkbox selected, none will display.

47333 - Streamline label-making process

**Module:** Patient Card ~ Labels  
**Issue:** Need to streamline the process for printing a label.  
**Enhancement:** axiUm now defaults to the newer Word labels dialog when Print Patient Label is clicked from Patient Card but access to the old templates is maintained. This results in less clicks to print the label. The Add Label dialog has been removed from this sequence. To limit the number of templates that display for a user to choose from, access levels for labels should be set up in Info Manager, which will result in the Select Patient Label window only displaying the labels that the user has access to. The result is a list size that is manageable.

58401 - Switching patient records without the Rolodex module

**Module:** Patient Card  
**Issue:** Need the ability to select another patient without using the Rolodex module  
**Enhancement:** Now has the ability to select patients already in the Rolodex module's patient selection list without having to open the Rolodex module.

**Setup:**

In the Desktop Settings window (in Maintenance module - System tab - Desktop icon), there is a Patient menu Limit field (new). This controls the maximum number of patients displayed in the Patient menu.
Usage:
From the axiUm main screen, click the Patient menu (new) to display the names of patients shown in the Rolodex module’s patient selection list. Then you can do one of the following:

- Select the Select Patients option to display the Rolodex (Select Patient) window for this patient. There is an Add to Selected Patient List checkbox (new). This checkbox is only available when you access this window from the axiUm main screen’s Patient menu (e.g. accessing this window from the Scheduler window will not display this checkbox).

Selecting this checkbox adds the patient to the Rolodex window’s patient selection list.

- Select the Previous Patient option to select the previously selected patient as the active patient.

- Select a patient name to make this patient the active patient.

- Enter the number next to the patient name to make this patient the active patient. Note that only the first nine patients have a number, this is hard-coded and is not user-defined.
75097 - Changing zip code while retaining home# area code

Module: Patient Card window

Issue: In the City Codes window (in Maintenance module - Basic tab - City Codes icon - City List window -  (Create a new Record)), you can set up a default area code for a zip code. When you enter or update an area code in the various records within axiUm, the associated home area code defaults to this value. This creates a problem. More patients are using their cell number as their home number, and this cell number has a different area code from the city they live. Consequently, changing their zip code in axiUm causes the area codes to also change, making this phone number invalid.

Enhancement: If the area code has already been entered and saved, updating the zip code will not default the area code.

82603 - Re-bill warning

Module: Patient Card window

Issue: Need the ability to auto re-bill claim/transactions if insurance information is entered after a claim or transactions have been entered.

Enhancement: There will be no automated rebilling however a new warning message will be displayed. Now when an insurance policy is added (Patient Card | Insurance tab), if claims exist with treatments that were performed within the patient’s (or their dependent’s) new policy dates, axiUm displays the message, "Warning: Treatments exist on file that may be affected by the newly added insurance coverage. You may want to consider rebilling these treatments."

Note: The treatment date must be within the new range, not just the claim date.

85558 - Delayed dependent initial coverage

Module: Patient Card - Insurance tab

Issue: Need axiUm to handle delayed dependent coverage (i.e. waiting period for children and spouses) where the subscribers starts with full coverage, but during the first year of coverage, the dependents have only limited coverage. Then after the waiting period (e.g. one year), the dependents receive the full coverage.

Enhancement: Now axiUm handles delayed initial dependent coverage. This is related to 85559.

85559 - Dependent effective dates

Module: Patient Card - Insurance tab

Issue: Need the ability to specify effective date ranges for a dependent’s benefit plan, so that axiUm will start the dependent’s benefit plan at a later date and end their coverage on a different date.

Enhancement: Now axiUm lets you to define dependant effective dates that override the policy’s start and end dates.

For example, an insurance policy covers the policy holder immediately. However, it delays the start of their dependant’s coverage by six months, and ends their coverage on the last day of the month in which they turn 18.

Setup:

1. Go to the Dependents window (in Rolodex module - Patient Card window - Insurance tab - Dependents button).
2. In the Effective Dates of Coverage section (new), enter the following new fields:
   - Start Date field (new): Enter the start date for this dependent's coverage. For our example, you would enter the date 6 months from the policy holder’s start date.
   - End Date field (new): Enter the end date for this dependent's coverage. The rules of the policy may indicate that dependent’s coverage ends on the day they turn 18, the end of the month during which they turn 18, or the end of the year in which they turn 18. For our example, you would enter the last day of the month in which this dependent turns 18 (e.g. June 30, 2010).

<table>
<thead>
<tr>
<th>Effective Dates of Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td>End Date</td>
</tr>
</tbody>
</table>

3. Click OK.

Usage:
When you set up dependent effective dates, these dates will override the effective dates of the benefit plan and the policy.

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85560 - Benefit plan “rider” coverage

**Module:** Patient Card - Insurance tab

**Issue:** Need the ability to enter optional benefit plan “rider” coverage that subscribers can purchase and use in addition to their linked benefit plan.

**Enhancement:** Now axiUm offers benefit plan “rider” coverage.

For example, a subscriber’s main benefit plan may have little or no ortho coverage, so they purchase the optional rider coverage for their children. You can set up riders for only children, only adults, or both.

**Setup:**
2. Select the Benefit Plans have optional rider coverage checkbox (new).
3. Go to the Coverage Template List window (in Maintenance module - Insurance tab - Coverage Templates icon).

Note: Rider coverage is only available to those benefit plans that use the linked coverage templates.

4. Select the Rider Templates option (new).
5. Enter the Code field and the Description field.
6. Click (Add a New Record) to save your entries and add this to the list view.

7. From the list view, highlight the new rider coverage template name you just created.
8. Click (Coverage Items) to display the Edit Coverage Template window.
Use this window to define this rider coverage template.

9. Enter the From field and the To field.

Note: A rider coverage must only contain procedure codes offered in the additional coverage; you must omit all other procedure codes in your rider coverage. axiUm always applies the rider coverage before using the main coverage, regardless of which one provides better coverage. For example, if the main policy provides 50% ortho coverage for codes D8000-D8999, and a rider coverage is added to increase the coverage of D8000-D8500 to 80%, explicitly excluding D8501-D8999 (0%) from the rider coverage will also exclude these procedures from their main coverage.

10. You can further define this rider coverage by specifying the age limit on it.

Select the Age-specific Coverage checkbox, click (Add a new Record) to enable (Age-specific Coverage Detail), and click this icon to open the Template Age-Specific Coverage window.

Note: The age limit cannot extend past the main policy’s age limits. For example, a main policy covers children up to age 18. A rider can be set up to provide additional coverage up until a younger age (e.g. 17), but cannot extend coverage past age 18. For a child rider coverage to be in effect, you must indicate the age limit. If you enter 0, the child rider
coverage will not be in effect. If there is an adult rider coverage specified, axiUm will use that instead. If an adult rider coverage does not exist, axiUm uses the main policy coverage.

Usage:

1. Go to the Linked Coverage Template window (in Rolodex module - Patient Card window - Insurance tab - highlight a linked coverage template from list view - Coverage button).

2. Click (Rider Coverage Templates) (new) to display the Benefit Plan Riders window (new).

Use this window to add rider coverage tied to this benefit plan (but are not tied to the child/adult coverage template). You can select a rider coverage template by going to the Child field or the Adult field and clicking (ellipsis) to display the Coverage Template List window and selecting the rider coverage template you created in the setup, for the child or adult.

99645 - Update patient address & home phone # of family members

Module: Patient Card

Issue: When you update a patient's address or home phone number, axiUm asks if you’d like to update the same information for their guarantors and/or emergency contact, but it does not offer the same updates for each family member. Need an option to do this.

Enhancement: Now when you change the patient’s address, axiUm asks if you’d like to update the same information for other family members.

If you update any part of the address (other than the Address is incorrect checkbox), the Update Addresses window displays the following new items to select:

- Patient's Emergency Contact
- Patient's Guarantors (including inactive, but not deleted)
- Patient's Dependents
- Patient's Guarantor's Dependents

Additionally, if you update the home phone number, axiUm displays the Update Home Phone Numbers window (new), listing the same items as above.

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**Patient Sign-In**

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**83516 - Sign-in for specific clinics**

**Module:** Patient Sign-In

**Issue:** Need new options to direct patients to the kiosk located in the clinic of their appointment. Otherwise patients miss their appointments because they waited in the wrong clinic after signing in.

**Enhancement:** Now if a patient signs in to a kiosk located at the wrong clinic, axiUm can display a customized message.

In the axiUm Kiosk Options window, there is now a Clinic Exceptions button (new). Clicking this button displays the Station Clinic Exceptions window (new). Use this window to define a customized message that axiUm displays if a patient tries signing in to a kiosk at the wrong location.

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**Personal Planner**

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**57413 - Add Status & State columns**

**Module:** Personal Planner - Lab Orders tab

**Issue:** Need to display a Status column and a State column.

**Enhancement:** Now displays a Status column and a State column. Clicking on these column headings will sort the records in the list view by this order.

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**85353 - Changed checkbox name**

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

**Issue:** The Include Provider's Previous Assignments checkbox should be renamed to the Include User's Previous Assignments checkbox, because this module is used by all users, not only providers.

**Enhancement:** Changed wording of checkbox from Include Provider's Previous Assignments to Include User's Previous Assignments.

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**Rolodex**

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45741 - Additional unapproved items displayed

**Module:** Rolodex ~ Patient Approvals window

**Issue:** Certain types of unapproved items (e.g. lab orders) do not trigger the blue indicator on the status bar. Need axiUm to bring these items to the user’s attention.

**Enhancement:** Now the Patient Approvals window displays the following unapproved items:
- Unapproved perio charts
- Unapproved lab orders
- Unapproved treatment plans

66706 - Benefit plans default option

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

**Issue:** Need axiUm to always select the Can have multiple subscribers checkbox by default.

**Enhancement:** Now axiUm selects this checkbox by default.

81850 - Child coverage for specific items

**Module:** Rolodex - Patient Info window - Insurance tab

**Issue:** This is for institutions with detailed coverage based on the child's age. Need more detail than the basic rule of, for example, child covered to 21 and student/child covered to 25.

For example, you can have plans that cover sealants up to 14 and ortho up to 18. Or, you have plans that only cover ortho after 21 and up to 25. You can also add a flat fee to a specific age group.

To accommodate this, we need the ability to add an age range to each coverage item. This will indicate that a specific item in the coverage is only applicable for patients within that range.

**Enhancement:** Now has the ability to define each coverage item by age.

**Setup:**
1. Go to Maintenance module - Insurance tab - Coverage Templates icon - Coverage Template List window - highlight an item - (Coverage Items) - Edit Coverage Template window.
2. Select the Age-specific Coverage checkbox (new). Clicking Modify will enable the (Age-specific Coverage Details) (new) in the toolbar.
3. From the list view, select a coverage that has the Age-specific Coverage checkbox selected.
4. Click on (Age-specific Coverage Details) (new) to display the Template Age-specific Coverage window (new).

Use this window to create age-specific rules to apply to this coverage item.

Note: Any age not included in the rules implies that a patient of that age has no coverage for that item. For example, if an item is defined for age groups 1-12, 14-17, and 18-20, a child who is 13 has no coverage for this item and the coverage will end on the day the patient turns 21. If this template is also used for adults, an entry must be made if adults are covered for the selected procedure code range (e.g., 21-999 will cover all adult ages).

If the policy is set up to switch to another template when the patient turns 21, this is not necessary.
You can also set this up through the Rolodex module - Patient Card window - Patient Info window - Insurance tab - Coverage button - Linked Coverage Template - Coverage Template List - Edit Coverage Template window. There is an Age-specific Coverage checkbox (new). Selecting this checkbox hides some of the unnecessary fields.

**82499 - Book by Providers specified by clinic**

**Module:** Scheduler - Active tab  
**Issue:** When using a book by provider, need the ability to select which clinic the book is for. This way, if a provider works in different clinics on different days, his column will only be enabled in the book/clinic they are working in that day.  
**Enhancement:** Now has the ability for books by provider to specify a clinic, so that axiUm disables columns for providers who are not in that clinic on that day. This will prevent the confusion of having several books showing the same provider available on the same day. Therefore the provider's work schedule plus the book's clinic now work together.

**Setup:**

2. In the **Book for selected** drop-down field, select the Providers option. axiUm enables the Clinic drop-down field (new).
3. In the Clinic drop-down field, select a clinic. In the Scheduler module’s Active tab, axiUm grays out the columns that are not applicable to a provider by looking at the provider’s work schedule to see which clinic he/she is working in that day.

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**83815 - Additional BirthDate field**

**Module:** Rolodex  
**Issue:** Need the ability to display the patient’s birth date in the Rolodex module’s patient information section. Currently you can only select to display the patient’s birth date in the Rolodex module’s patient list section as a column heading.  
**Enhancement:** Now has the ability to display the patient’s birth date in the Rolodex module’s patient information section.

**Setup:**

1. Go to Rolodex module - 🍄 (Options/Settings) - Patient Options window.
2. Go to the Rolodex section, and from one of the Options Display Field drop-down fields (1-9), select the BirthDate option.
3. Click the OK button.

Usage:
From the Rolodex module, highlight a patient’s name, from either the patient list or the patient selection list. In the patient information section, axiUm displays the new BirthDate static field and the patient’s birth date.

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**87860 - Copying patients**

**Module:** Rolodex  
**Issue:** Need the ability to copy a patient record directly from the patient list (search results). Currently you can only copy patient records from the patient selection list.  
**Enhancement:** Now you can copy a patient record displayed in the patient list (search results) by highlighting their record and clicking 📢 (Patient Copy).

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**98050 - Rename the Add Default & Add Special buttons**

**Module:** Rolodex ~ Patient Approvals window  
**Issue:** The button names Add Default and Add Special are confusing. These buttons need a more intuitive name.  
**Enhancement:** On the Patient Approvals window (changed):

- The Add Default button has been renamed to the Approve button.
- The Add Special button has been renamed to the Review Amts checkbox.
118655 - Improved image quality of uploaded patient photos

**Module:** Rolodex

**Issue:** Sometimes, when you upload a patient photo, their image quality less than optimal.

**Enhancement:** Fixed to display uploaded patient photos in higher quality.

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**Scheduler**

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33394 - Weekly tab scheduling

**Module:** Scheduler - Weekly tab

**Issue:** Need the ability to do similar tasks in the Weekly tab as in the Active tab.

**Enhancement:** You can now create and edit appointments directly into the Weekly tab. Right-clicking on an appointment now displays the same right-click options (new) as you would from the Active tab. The previous functionality in the Weekly tab to left click to move to the Active tab for that date, is still available by clicking on the weekday column title at the top of the Weekly tab. The Weekly tab displays the schedule for the currently selected Provider and could now be used by providers as an alternative to the Active tab to maintain their schedule.

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40373 - New method of adding appointment requests

**Module:** Scheduler ~ New Appointment Request window

**Issue:** Need the ability to make appointment requests from the Scheduler module. Currently you must go to the Rolodex module, highlight a patient from the patient selection list, and select the Appt Request right-click option and display the New Appointment Request window. Need the ability to access this window from the Scheduler module also.

**Enhancement:** Now axiUm has the Make Appt Request right-click option (new) from the following areas of the Scheduler window:

- Chair tab
- Active tab
- Weekly tab

Selecting this option displays the New Appointment Request window. This right-click option is disabled if the date is in the past. axiUm automatically fills the details based on the information associated to the selected chair or column (details such as date, provider, clinic, etc.).
55405 - Ability to hide weekends in the display

**Module:** Scheduler - Active tab

**Issue:** Need the ability to hide weekend columns from the Scheduler window.

**Enhancement:** Now has the ability to hide Saturday and Sunday columns from the Scheduler’s calendar display. Also the Appointment Expert window omits these weekends from the search process.

**Setup:**

Go to the Maintenance module - Scheduler tab - Scheduler Options icon - Scheduler Options window - Options section. There is a Weekends (Display) section (new) with the following new checkboxes: Saturday, Sunday.

Selecting and deselecting these checkboxes show/hide the selected weekend from the Scheduler window’s Weekly tab:

- Selecting both checkboxes display both Saturday and Sunday columns in the Scheduler module’s Weekly tab:

![Scheduler Options window](image)
Note: In the Scheduler window's Active tab, moving the calendar display in daily increments still displays the corresponding weekend. For example: Friday > Saturday > Sunday > Monday.

Also, in the Scheduler module - (Expert) - Appointment Expert window - Weekday section, the corresponding checkboxes are selected by default so that they are included in the search process.

- Deselecting both checkboxes hides both Saturday and Sunday columns in the Scheduler module's Weekly tab:
Note: In the Scheduler window’s Active tab, moving the calendar display in daily increments skips the corresponding weekend. For example: Friday > Monday.

Also, in the Scheduler module - Appointment Expert window - Weekday section, the corresponding checkboxes are deselected by default so that they are omitted from the search process.

57539 - Search on available instructors, make appointment requests

Module: Scheduler

Issue: Need the ability to filter the instructors to display only those who are available. Also need the ability to submit an appointment request directly from the Appointment Expert window’s search results.

Enhancement: There are two new features:

- The ability to list only available instructors.
- The ability to make an appointment request directly from the Appointment Expert window.

Setup (to search based on available instructors):

1. Use chair method of scheduling.
   In the Scheduler Options window, go to Scheduler Type section and select the Chair option.
2. Search is based on available chairs.
   Go to the Appointment Expert window and select the Search on Available Chairs option.
Usage:
1. In the Appointment Expert window, enter your search criteria.
   
   To use the new feature, click the Instructor (ellipsis) to display the Users List window (new, this used to display the Instructors List window). Select the Show Instructors Only checkbox (new) and run a search.

   ![Users List](image)

   You can select multiple instructors (e.g. all instructors in the perio department). However, in the Appointment Expert window’s search results, axiUm cannot indicate which instructor is associated to which available time block.

2. Create an appointment request.
   
   To use the new feature, highlight a record from the list view and select the New Appt Request right-click option (new) to display the New Appointment Request window.

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57584 - Failed & cancelled appointments to display

**Module:** Scheduler - Active tab

**Issue:** When you go to an existing appointment and right-click to select Fail or Cancel, the appointment is removed from the scheduler. Need the ability to show failed appointments on the schedule.

**Enhancement:** Now has the ability to continue displaying failed and cancelled appointments on the Scheduler.

**Setup (primary method):**

1. Go to Maintenance module - System tab - Station Options icon - Station Options window, and select Scheduler section - Schedule section.
2. Select one of the following:
   - ShowCancelAppts: If on a cancelled appt will show with a big black X through it.
   - ShowFailAppt: If failed it will show with a big red X through it.

**Setup (secondary method):**

Go to the Scheduler module - Options/Settings - Scheduler Options window - Options section. There is a Show Appointments option (new) displaying the following checkboxes:

- Cancelled checkbox (new)
- Failed checkbox (new)

axiUm now displays the failed appointments with a red X and the cancelled appointments with a black X drawn over them. The appointments are also reduced in width to only take half of the column so that another appointment can be booked into the same time slot.

Cancelled or failed appointments can be rescheduled, or you can undo the failed/cancelled status.
58570 - Default the clinic displayed in Chair tab

**Module:** Scheduler - Chair tab

**Issue:** Need the ability to display Scheduler module’s Chair tab using the last clinic viewed by the logged on user.

**Enhancement:** In Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record) - Users window - Additional tab - Scheduling section, there is an **Open Scheduler with** drop-down field (new), with the following options:

- Last Clinic Viewed: axiUm displays the last clinic this logged on user had viewed. This is the previous behavior.
- Default Clinic: axiUm displays the default clinic for this logged on user, as defined in the User Clinics window (in Maintenance module - Office tab - Users List - run search - (Edit Record) - Users window - Additional tab - Scheduling section - Clinic button). This option offers the new behavior.

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61392 - Non-clinic time result log

**Module:** Scheduler ~ Copy Provider Non-Clinic Time window

**Issue:** In the Copy Provider Non-Clinic Time window (in Scheduler window - (Non-Clinic Times) - (Copy Non-Clinic Times To/From)), when you finish copying a non-clinic time from one provider to another, axiUm logs this activity in a *.txt file (the results file). This file shows the description of the non-clinic time being copied, but does not show the time periods that were copied. Users cannot differentiate multiple non-clinic times that used the same description but different dates.

**Enhancement:** Now axiUm logs the following information in the result file:
- date
- time from - time to

Also, when axiUm completes the copying process, it displays the message, “Non-Clinic Time copy completed”.

70708 - Required fields for recall information

**Module:** Scheduler ~ Patient Recalls window

**Issue:** Need the ability to enforce field entries in the Patient Recalls window.

**Enhancement:** A few changes:

Change 1:

Step 1 of this setup is done from the Required Field Definitions window. The location of this window has changed:

- Current location: Maintenance module - Patient tab - Required Fields icon - Required Fields window - Required Field Definitions window.

- New location: Maintenance module - Basic tab - Required Fields icon - Required Fields window - Required Field Definitions window.
Change 2:

Step 2 of the setup is done from the Required Field Definitions window. This window now displays a Type drop-down field (new) with the following options:

- Patient: Select this option to define required fields for patient information.
- Recall: Select this option to define required fields for recall information.

Current:

![Required Fields](image1)

New:

![New Type Field](image2)

Highlighted items in this window’s list view to indicate fields required to be entered by the user.

Change 3:

Step 3 of the setup is done from the Required Field Definitions window (Required Fields window - select the Recall option - ![Required Field Definitions](image3)). This window now displays a Type field (new).

Current:

![Required Field Definitions](image4)

New:

![New Type Field](image5)

Step 4 of the setup is done by clicking ![Required Field Assignments](image6) to display the Required Field Assignments window. This window displays a Type field (new) also.
Use this window to specify the practice and the recall codes to apply these required fields. This window displays a Type field (new) also.

- If the Type drop-down field displays Patient, axiUm displays a Pt Status Code drop-down field.
- If the Type drop-down field displays Recall, axiUm displays a Recall Code drop-down field.

Usage: When you book a hygiene appointment in the Scheduler module, for example, the hygiene recall code 01M, 1 Month under the practice Grad Perio, axiUm forces you to enter the required fields.

73086 - Planning appointment series

Module: Scheduler ~ Appointment Planning window (new), Appointment Series window (new)

Issue: Need the ability to define a series of appointments with defined intervals.

Enhancement: Now has advanced appointment planning, enabling you to link appointments into a series of appointments.

Go to the Scheduler window - Rolodex - Rolodex (Select Patient) window - select patient - Patient Appointments window or Family Appointments window. These windows now have a Planning button (new).

Patient Appointments window:
Family Appointments window:

Clicking the Planning button displays the Appointment Planning window (new).
Use this window to:

- Add new planned appointments for planned treatments already in axiUm.
- Assign planned treatments to existing appointments.
- Set a booking order that the scheduling staff can follow when booking appointments.
- View upcoming patient appointments

Go to the Appointment Planning window's right list view, right-click to display a list of options and select the Create Series option. axiUm displays the Appointment Series window (new).

Use this window to create and maintain multiple appointment series, including minimum intervals between appointments.
Usage: Once a series of appointments have been set up, the booking staff can book the entire series, in the correct order, at the same time. If you cancel an appointment from a series, axiUm displays a warning to cancel other appointments.

75510, 99646 - Scheduler column display

Module: Scheduler - Active tab

Issue: Sometimes the column width is too short to display the entire provider code. Need the ability to right-justify the column heading so that if the provider code is too long, you see only the last few digits of provider code.

Enhancement: Now axiUm has the ability to right-justify the column contents.

Setup:
1. Go to the Station Options window (in Maintenance module - System tab - Station Options icon).
2. Go to Scheduler section - Schedule section, and select the CroppedColTitleDisplay option (new). This option displays the following values:
   - 0: show beginning of code
   - 1: show end of code
3. In the Default field, enter 1.

Usage:
1. Go to the Scheduler Display Options window (in Scheduler module - (Options/Settings) - Scheduler Options window - Display button).
2. Make sure that the Provider Codes option is selected.
3. The Ensure __ of code is shown drop-down field (new) displays the following options:
   - beginning
   - end
4. Select the End option.

Then in the Scheduler module’s Active tab, if the provider code does not fit in the allotted space, axiUm hides the excess characters at the beginning of the provider code.

77239 - Need more columns in Book

Module: Scheduler - Active tab

Issue: Currently axiUm can display a maximum of 100 columns (chairs or providers) in a book. Need the ability to display more columns.

Enhancement: Now displays a maximum of 125 columns. Setup of appointment book will limit the selection of 125 chairs or providers in a book.

82221 - Updated list views

Module: Scheduler - all tabs

Issue: Need the list views in various windows standardized and the column headings to display more meaningful information.

Enhancement: Standardized the columns that are displayed in the list view of the following windows:
- Scheduler window
  - Pending tab
  - Availability tab
- Patient Card window
- Patient Appointments window / Family Appointments window
- Appointment Lists window
  - Appointments tab
  - Recall List tab
  - Wait List tab
- Personal Planner window

83394 - Break time indications
Module: Scheduler - Active tab
Issue: When booking appointments in axiUm, there was no indication visually of when a provider required a break. Therefore, on booking during a break time, an error would be displayed. axiUm needs to show when these break times are so that users can book accordingly.
Enhancement: The Active tab’s multi-chair column now displays break times in yellow, in addition to the existing green for single booked and red for double booked.
   1. Go to Scheduler module - (Options/Settings) - Scheduler Options window - Options section.
   2. Select the Show Provider Time Column for Current Provider checkbox.

83481 - No hygiene back-to-back appointment
Module: Scheduler ~ Appointment Expert window
Issue: axiUm has hard-coded limited appointment codes (by session and by provider) to prevent back-to-back appointments (if in the Maintenance module - Scheduler tab - Limited Appt. Codes icon - Limited Appointment Codes window, the Limit field is greater than 1). This is fine. Need the additional ability for users to decide if back-to-back appointments are allowed.
Enhancement: Now gives users the ability to decide whether back-to-back appointments of a certain code are allowed.

Setup:
   2. Select the Allow Back-to-Back checkbox (new).

83887 - Re-organizing Family Appointments window
Module: Scheduler ~ Patient Appointments window, Family Appointments window
Issue: Need to re-organize the Patient Appointments window and the Family Appointments window.
Enhancement: The following changes have been made to the Patient Appointments window and the Family Appointments window:
- From both windows, deleted the following columns: Chair, Provider#, Discipline, Description.
- From the Family/Patient Appointments window, added the following columns: Provider (name), Appt Code, Reason, Wait List, Patient Phone# (home).
- Re-ordered the existing columns.

84186 - Patient phone number in Appointment Expert window
Module: Scheduler ~ Appointment Expert window
Issue: Need the ability to view a patient’s phone number.
Enhancement: The Appointment Expert window now displays an Info button (new) next to the Patient field. Clicking this button displays the Patient Contact Information window containing read-only information about the selected patient’s contact information, as entered in the Patient Info window.

84188 - Patient information in the Family Appointments window
Module: Scheduler ~ Family Appointments window
Issue: Need to display a patient’s contact information in the Family Appointments window.
Enhancement: Now in the Family Appointments window when you highlight a patient from the Family list box, the Patient Information section (new) displays read-only contact information, as entered in the Patient Info window. This way, if the patient’s home phone number displayed in the list view is not enough, you can retrieve additional contact information here.

84189 - Default patient in Select Family Member
Module: Scheduler ~ Family Appointments window
Issue: In the Family Appointments window, if you click the Make New button or the New Planned button, axiUm displays the Select a Patient window. This is fine if you selected multiple family member checkboxes. However, if you selected only one family member checkbox, axiUm should skip the Select a Patient window and display the New Appointment window or the New Planned Appointment window.
Enhancement: Fixed.

84297 - Multiple times in a block are too close
Module: Scheduler ~ Appointment Expert Options window
Issue: If there is a one-hour gap and a 50-minute appointment, axiUm offers two results with a 10-minute difference in start time. Need a method to avoid this.
Enhancement: New setup options. In Scheduler module - (Expert) - Appointment Expert window - Options button - Appointment Expert Options window - Search section, axiUm displays the following new items:
- Allow duplicate search results checkbox
- Minimum minutes between times offered field
84893 - (Re)schedule failed/cancelled appointments

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

**Issue:** Currently the Sch. w/ Expert button is disabled when you highlight a failed or cancelled appointment from the list view. If you want to reschedule these types of appointments, you must click the Reschedule button to display the yellow “floating” appointment, then right-click it and select the Appointment Expert option to display the selected appointment in the Appointment Expert window.

Need to enable the Sch. w/ Expert button so we can bypass these steps and open the selected failed or cancelled appointment directly in the Appointment Expert window.

**Enhancement:** In the Patient Appointments window or the Family Appointments window, highlighting a failed or cancelled appointment enables the Sch. w/ Expert button. Clicking this button opens the selected appointment in the Appointment Expert window as a reschedule-type appointment.

85557 - Need Expert to run dynamic search for recalls

**Module:** Scheduler ~ Appointment Expert window

**Issue:** Need axiUm to change the length of the appointment block when searching for a recall appointment that includes an exam.

**Enhancement:** Now axiUm changes the length of the appointment block when searching for a recall appointment that includes an exam. For example, if you search for a recall appointment (50 minutes), and the patient is due for an exam (10 minutes), axiUm searches for a 60-minute appointment block rather than a 50-minute appointment block.

85842 - Grace period definable by user

**Module:** Scheduler - Active tab

**Issue:** axiUm is hard-coded to allow you to book 30 minutes into lunch or end of day. Need the ability to override this rule and define this grace period by provider.

**Enhancement:** Now axiUm allows you to override this rule and define this grace period by provider.

**Setup:**
1. Go to the Users window (in Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record).
2. Go to the Provider tab, and in the Scheduler section, the following changes have been made:
   - **Max Minutes __** field: This used to be called Max Minutes __ (booked appt time) field. The functionality remains the same.
   - **Appts Allowed __ minutes outside available time** field (new): Enter the number of minutes outside of the available (reserved) time that this provider may book. To maintain previous behavior, enter 30.
3. Click Save.

**Note:** This does not affect the Appointment Expert window’s search functionality.

85850 - Unlimited columns in a book by provider, limit by clinic

**Module:** Scheduler - Book window
**Issue:** Need the ability to create a book by provider, allowing you to display an unlimited number of columns in the Scheduler window, but limit the display only by clinic.

**Enhancement:**

All providers, one clinic:
a book of providers for 1 clinic can have unlimited providers/columns but will only display a certain number of columns due to space limitations.

All providers, all clinics:
a book of providers for all clinics has a limit of 125 providers and 125 columns. Note that a provider can have more than one chair so if there are 125 providers selected and one of them has two chairs, it will still only display 125 columns meaning that one column will not display.

All providers working in that clinic on that day:
To set up a book with say 150 providers, they should uncheck 'Show all providers' in the Books setup dialog. This will then only show columns for providers who are actually working in that clinic on that day and will therefore not show grey columns.

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**87127 - Changed behavior of Appointment Expert window**

**Module:** Scheduler ~ Appointment Expert window

**Issue:** The behavior of the Appointment Expert window when you select from the search list is not intuitive. Selecting the checkbox deletes the selected item, but users need a better visual indication that the item it deleted.

**Enhancement:** Now use strikeouts to indicate that the selected item is unwanted.

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**87312 - Additional limits on minutes applied to appointments with exams**

**Module:** Scheduler

**Issue:** axiUm changes the length of the appointment block when searching for a recall appointment that includes an exam (see 85557). There is the need for an additional limitation so that axiUm will do this only for appointments that are 6 units or less (60 minutes or less).

**Enhancement:** Now if the appointment is more than 6 units (60+ minutes), axiUm does not add the extra unit (10 minutes) to the hygiene time.

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**87656 - Appointment Expert window offers discipline match only**

**Module:** Scheduler ~ Appointment Expert window

**Issue:** Currently, axiUm offers available time blocks where the discipline indicated in the Appointment Expert window matches with the provider’s preferred disciplines, plus available time blocks that have been reserved without specifying a preferred discipline. Need an option to exclude these reserves without disciplines, and offer only those available time blocks that match the indicated discipline only.

**Enhancement:** There is an Only List Matching Disciplines checkbox (new).
Selecting this checkbox searches for exact discipline matches only, and omits time blocks involving reserves without disciplines.

88300 - Need refresh timer on Active tab

**Module**: Scheduler - Active tab

**Issue**: Need the ability to set the refresh time for the Active tab.

**Enhancement**: The following changes were made to the Station Options window (in Maintenance module - System tab - Station Options icon):

- The ActiveTabRefreshTime option has been renamed to the **ApptIndRefreshTime** option (new), *function remains same*, this is the refresh time only for the appointment indicators displayed in the Active tab.
- The ActiveTabRefreshTime option: This option no longer sets the timer for the appointment indicators; now this sets the timer for all other data displayed in the Active tab.

axiUm also has the ability to set the refresh time on the Weekly tab. See 88367.

88367 - Need refresh timer on Weekly tab

**Module**: Scheduler - Weekly tab.

**Issue**: Need the ability to set the refresh time for the Weekly tab.

**Enhancement**: The enhancement to add a refresh timer for all data displayed in the Active tab (88300) also applies to the Weekly tab. In the Appointment Display Options window (in Scheduler module - (Options/Settings) - Scheduler Options window - Display button), there is an **Auto-Refresh Active and Weekly tabs** section (new).

- **Auto-Refresh Active and Weekly tabs**
  - **This should only be used if network refreshing is not working.**
  - **Refresh every** 20 (seconds)
96360 - Searching hygiene appointments without DHR is slow

**Module:** Scheduler ~ Appointment Expert window

**Issue:** When searching to fill hygiene appointments without a DHR, axiUm is slow. Need to make this process faster.

**Enhancement:** This process is now faster with the following new features:

- axiUm displays search results as they are found. This lets you start talking to the patients as the results are found line by line rather than waiting for all search results to display.
- The Pause button (new) lets you interrupt the search process if you found a good match before the process ends.
- The Load More button now lets you continue the search process by appending new search results to the original list. axiUm automatically highlights your first selection so you do not lose sight of it.

96452 - Reducing excessive columns

**Module:** Scheduler - Active tab

**Issue:** Need the ability to show only those columns applicable to the provider.

**Enhancement:** Now has the ability to show only those columns applicable to the provider.

In the Books window (in Maintenance module - Scheduler tab - Books icon), when the Book for selected drop-down field displays the Provider option, a Show columns when providers are Secondary/Add'l option (new) is enabled.

Selecting this option indicates that if a provider is the second or additional provider on an appointment, the Scheduler window will display a column for them.

96983 - Converting from cancelled to planned appointments

**Module:** Scheduler ~ Patient Appointments window

**Issue:** Need the ability to convert appointments cancelled over the phone into planned appointments.

**Enhancement:** The following changes have been made:

- When an appointment (regular or recall) is cancelled, axiUm changes it to a planned appointment (even if the appointment never originally had a planned stage), and the historic records will still display this as a cancelled appointment.
Once a cancelled appointment changes to planned appointment, the original planned appointment’s Not Before field now displays the planned appointment date (if the appointment never originally had a planned stage, this field will be blank).

97064 - Need indicator for booking made by Appointment Expert
Module: Scheduler ~ Appointment Expert window
Issue: Need a method to indicate that an appointment was booked using the Appointment Expert window.
Enhancement: The Appointment History window (in Scheduler window - (Rolodex) - Rolodex (Select Patient) - Patient Appointments window or Family Appointments window - History button) now displays the Added using Expert static field (new) if the patient booked an appointment using the self-booking telephone system.

98324 - Improved Appointment Expert search time
Module: Scheduler ~ Appointment Expert window
Issue: Sometimes searching in the Appointment Expert window takes a long time. Need to improve search speed.
Enhancement: Revisions were made to the Appt Expert search algorithm to improve the performance of the Appointment Expert when searching on reserved chairs. Most noticeable improvement will be when searching for an appointment in a clinic/book/chair with few openings.

99641 - Selecting patient from Family Appointments window
Module: Scheduler ~ Family Appointments window
Issue: Need the ability to select a patient in the Family Appointments window and make that patient the active patient. Currently, you must close the Family Appointments window, open the Rolodex module, search for a patient, make this patient the active patient, and return to the Family Appointments window.
Enhancement: Now in the Family Appointments window’s Family list box, the following new right-click options are available:
- Select Patient (new): Selecting this right-click option makes this patient the active patient.
- Patient Info (new): Selecting this right-click option keeps the Family Appointments window open and displays the Patient Info window.
- Patient Card (new): Selecting this right-click option closes the Family Appointments window and displays the Patient Card window.

99643 - Display providers in appointment windows
Module: Scheduler ~ Family Appointments window
Issue: Need axiUm to display the selected patient’s providers in the Patient Appointments window and the Family Appointments window.
Enhancement: Now axiUm displays the primary provider and primary hygienists in the lower left area of the Patient Appointments window and the Family Appointments window.
99644 - Cancel button on appointments windows
Module: Scheduler ~ Patient Appointments window, Family Appointments window
Issue: Need a Cancel button on the Patient Appointments window and the Family Appointments window.
Enhancement: Now axiUm displays a Cancel button (new) on the Patient Appointments window and the Family Appointments window. This button is enabled if the item highlighted in the list view is a booked appointment (active, checked in, or checked out). This button is disabled if you select multiple items in the list view.

100019 - Improved workflow booking partial reserves
Module: Scheduler ~ Reserve Partial Session for Provider window
Issue: This is for providers with no chair reservations, for booking staff using the chair method of scheduling. Need to improve the workflow from viewing a requested/planned appointment to booking the appointment in an empty chair. Currently this involves a few extras steps because the details of the requested/planned appointment displayed in the Appointment Expert window (to search for a time block) is not automatically displayed in the Reserve Partial Session for Provider window (to book this time block in this empty chair).
Enhancement: Improved the workflow of booking requested/planned appointments into chairs for partial reserves.

Setup:
Make sure that the Appointment Expert Options window has the 'Make Appts' button will schedule and auto-add Reserve checkbox selected.

Usage:
1. Display the details of a requested/planned appointment in the Appointment Expert window.
   Go to the Appointment Lists window, highlight a requested/planned appointment from the list view, and select the Schedule with Expert right-click option.
2. Search on available chairs.
   Select the Search on Available Chairs option and click the Search button.
3. Select a time block by doing one of the following:
   - Highlight an item from the list view and click the Make Appts button.
   - Click the Preview button to display the Appointment Expert in preview mode, then highlight an item from the list view and click the Make Appts button.

axiUm takes you to the Chair tab and displays the Reserve Partial Session (Expert) window (new). This window displays the details of the requested/planned appointment with the exact time required (you can change this). When you confirm the details, axiUm books this appointment, then takes you to the Active tab so you can see the booked appointment.

Transactions

48690 - Support for ICD-10 codes
Module: Transactions ~ Medical Billing window
**Issue:** Medical Diagnosis Codes are transitioning from the ICD-9 list of codes to the ICD-10 list of codes. This must be used by all institutions by September 2013. This means axiUm must support both ICD-9 codes and ICD-10 codes during this transition.

**Enhancement:** For now, a school may update their system options to indicate that ICD-10 codes will be used going forward and also map the new code to an existing ICD-9 code. As insurance companies start to support the new codes, the insurance company record will be updated to reflect this. If axiUm is using ICD-10 and an insurance company still requires ICD-9, as long as the ICD-10 codes are mapped to ICD-9 codes, the ICD-9 code will print on claim forms and EDI submissions.

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**53228 - Displaying insurance company details**

**Module:** Transactions - Treatment tab  
**Issue:** Need quick access to insurance details  
**Enhancement:** Now have the ability to access insurance details. Go to Transactions module - Treatment tab - highlight an item from the benefit plan list view - right-click - Show Details option (new) to display the Patient Info window’s Insurance tab.

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**62587 - Changing instructors on multiple treatments**

**Module:** Transactions - Treatment tab  
**Issue:** Need the ability to change the instructor for multiple treatments on a claim.  
**Enhancement:** Now in the Transactions window’s Treatment tab, if you change the Instructor field, axiUm asks if you want to update other treatments on the same claim to the same instructor.

Note: To maintain existing behavior, go to the Power Admin module and make the Approval User field red. Enabling the button allows a user to indicate that a different user approved the work without any validation from that user.

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**74984 - Medical information requirements**

**Module:** Transactions - Treatments tab  
**Issue:** Some claims are rejected if the ICD code and Place of Service code are not recorded on the claim. Need to make these fields required.  
**Enhancement:** For medical claims (medical procedures and dental procedures billed on a medical claim), if the insurance company requires this information (the Maintenance module - Insurance tab - Insurance Companies List window - run search - (Edit Record) - Advanced button - Insurance Company Advanced Options window has the ICD Codes are required for Medical claims checkbox (new) selected), the Place of Service code will always be required, and at least one ICD code must be entered. axiUm displays the Tx Medical Information window in these situations. If the codes are not entered here, the claim will show as a red error line in the EDI claim list.

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**78551 - Hold overpayments as credits to patient**

**Module:** Transactions - Insurance Payments  
**Issue:** Need the ability for patients to accumulate reserve funds from secondary insurance provider.
**Enhancement**: Now has the ability for patients to accumulate reserve funds from their secondary insurance provider. If primary insurance coverage results in the secondary insurance paying less than the maximum coverage, then under certain state law, this remaining coverage must be held for the patient's future use (e.g. charges, deductibles, co-pays, office fees, etc., but not visit fees). The reserve funds, if unused, are reset to $0 annually when the policy year-end is reached.

**Setup:**

In Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window - search for and select an insurance company - Insurance Company window - Advanced button - Insurance Company Advanced Options window, there is a **Patient Reserve Funds (that are Tracked)** checkbox (new). Selecting this checkbox indicates that you want to track and apply these reserve funds in treatment estimates, and also axiUm displays the Reserve Fund icon (new) in the Transactions module.

**Usage:**

In Transactions module, there is a Reserve Fund icon (new) if the patient's insurance plan allows the use of reserve funds, and the patient currently has $0 reserve funds.

- Patient has funds remaining (credit) with this policy's Insurance Company.
- Patient lacks funds (debit) due to over-allocation of reserved funds

Clicking this icon displays the Manager Patient Reserve Funds window (new). Use this window to manually add, edit, and withdraw funds under this patient's insurance company.
80113 - Future-dated fee schedules & estimates

Module: Transactions ~ Estimates window

Issue: Need the ability to specify future-dated estimates. For example, if changes in coverage are effective January 1, and a patient needs an estimate on December 12 for treatment to be completed after January 1, axiUm must use the coverage amount based on the renewed plan.

Enhancement: Now has the ability to specify future-dated estimates, with changes to estimates based on future-dated:

- Renewed plans
- Fees

If estimates are made for a future-dated treatment and then the treatment is completed before renewal date, axiUm bills the patient the old coverage amount.

Setup:

1. First you must update your fee schedules by loading or copying them.
2. Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Load Schedule tab - Schedule ellipsis - Fee Schedule Codes window.
3. From the list view, highlight a fee schedule.
4. Click (Fee Schedule Definitions) to display the Fee Schedule Definitions window (new). This window gives you the added ability to define effective dates for the new fee schedules.
5. From the list view, highlight an item.
6. Click (Fee Schedule Amounts) to display the Fee Schedule Amounts window (new). This window gives you the added ability to define new fees for this date range for the updated fee schedules.

An alternative way to create a new fee schedule is to specify the new date range (in the Fee Schedule Definitions window), then copy all current fees to the new schedule (in the Fee Schedule Updates window - Copy Schedule tab), then either manually adjust each fee that that changed, or adjust all fees by a percentage (in the Fee Schedule Updates window - Adjust Schedule tab).

Note: If you enter the new fee guide’s end date as, for example, December 31, 2010, and you do not import the next fee guide for 2011, any estimate done for a date after December 31, 2010 will show $0 amounts.

Usage:

To print estimates using current/future fees:

1. Go to Transactions module - Treatment tab - Planned tab - right-click - Print Estimate option - Select Planned Treatments window - highlight the item(s) - OK button - Estimate window. This can also be done from EHR window - (Estimate).

There is a new Estimated Values section to base your estimates on the following options:

- Planned Tx Date: fees based on date of planned treatment
- Date: fees based on selected date

2. Click the Print button.

To adjust an existing fee schedule to be a percentage of an existing fee schedule:

1. Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Adjust Schedule tab.
2. From the Date Period drop-down field (new), select a date period.
3. Click OK.

To delete an existing fee schedule:
1. Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Delete Schedule tab.
2. From the Date Period drop-down field (new), select a date period.
3. Click OK.

To copy a fee schedule for a specific date period (e.g. for the purpose of copying last year’s fee schedule before changing it for this year’s fee schedule):
1. Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Copy Schedule tab.
2. Enter the Schedule From and Date Period fields.
3. Enter the Schedule To and Date Period fields.

To load future fee guides (to load fee guides for specific date periods):
1. Go to Maintenance module - Clinical tab - Fee Schedule Updates icon - Fee Schedule Updates window - Load Schedule tab.
2. Enter all the fields, and in the Date Period drop-down field (new), select the date period to load into axiUm.

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80934 - Contract insurance indicators

**Module:** Transactions - General tab

**Issue:** axiUm displays 🛡️ in the Patient Card window’s insurance information section to indicate that an insurance coverage is a contract-type policy (the Insurance Company window’s Contract Code field displays a contract policy code). Need this icon to also display in the Transactions window’s General tab, beside the insurance company code.

**Enhancement:** Now axiUm displays 🛡️ in the Transactions window’s General tab, beside the insurance company code, if this insurance is a contract-type policy.

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82903 - Plans with insurance limits & patient maximums

**Module:** Transactions ~ Estimate window

**Issue:** Need to support policies that have Patient maximums as well as patient/family limits, by having the ability to specify that both the patient maximum balance and the policy limit balance are reduced when entering charges. Once the policy limit balance is $0, even if the patient maximum balance is $0, the patient is charged.

**Enhancement:** axiUm now has the ability to support plans with patient maximums and family/patient limits, and to reduce both patient maximum balance and the policy limit balance.

**Setup:**
1. Go to the Maintenance module - Insurance tab - Coverage Templates icon - Coverage Template List - highlight an item from the list view - 🛡️ (Coverage Items) - Edit Coverage Template window.
2. Select the Limit is a Patient Maximum checkbox. axiUm enables the Affects Patient/Family Limit/Deduct checkbox.
4. Click ![Modify Record](image) (Modify Record).

83533 - Supporting X12N 5010 format for EDI claims

**Module:** Transactions - EDI Claims window  
**Issue:** Require the option to submit electronic claims in new 5010 format.  
**Enhancement:** Now the following 5010 options are available:
- X12N5010 Dental  
- X12N5010 Medical  
- X12N5010NYMed 2.1  

You can view these options in:
- Maintenance module - Insurance tab - Insurance Companies icon - run search - ![Modify Record](image) (Edit Record) - Insurance Companies List window - Insurance Company window - EDI section - EDI Version drop-down field.  
- Maintenance module - System tab - Processes icon - Processes window - EDI Claims button - EDI Claims window - Claim format drop-down field.

85239 - Direct scan for insurance payment attachments

**Module:** Transactions - Ins Pmt tab  
**Issue:** Need the ability to scan files directly.  
**Enhancement:** You can now scan files directly. From the Ins. Payments tab's list view, select the Add Attachment right-click option. In the Add Attachment (Ins Pmt) window, when you add an attachment, you have the ability to Scan Direct. Files can be saved in JPEG or TIFF depending on your setup in Rolodex module - Patient Card window - ![Options/Settings](image) (Options/Settings) - Patient Options window.

86117 - New HIPAA National Health Plan ID# for insurers

**Module:** Transactions ~ EDI Claims window  
**Issue:** Insurance Company NPI numbers are now required in EDI files.  
**Enhancement:** In the Maintenance module - Insurance, there is a NPI field (new). In segment NM1 (Payer Name), if there is an insurance company NPI specified, NM108=XV, NM109=Ins.Co.NPI. If no insurance company NPI specified, NM108=PI, NM109=Ins.Co.EDI Code.

86571 - Allow $0 patient payment

**Module:** Transactions - Payments tab  
**Issue:** Need the ability to enter a $0 payment in the Amount field.  
**Enhancement:** Now has the ability to enter a $0 patient payment in the Amount field. This lets you record a payment entry line when a patient refused to pay or if you are recording non-contracted insurance payment denials through the patient payment area.
87121 - NY Medicaid Changes for episode billing

Module: Transactions ~ EDI

Issue: Starting January 1, 2011, NY Medicaid is adding episode billing. For this purpose, axiUm requires the ability to use a new rate code and also the ability to include ancillary treatments with different dates on the claim.

Enhancement: Now axiUm supports episode billing.

97315 - NY Medicaid changes for sealants

Module: Transactions ~ EDI Claims window

Issue: The NY Medicaid rate code is not being submitted in the claim. For NY Medicaid claims, this must be displayed first in the list of procedures. However, the sealant procedures were being consolidated into one line, but because they were the first in the list, they were removed because the code is expecting the rate code to be there instead.

Enhancement: Fixed.

97578 - Changes to Release of Information for 5010

Module: Transactions ~ EDI Claims window

Issue: If the System Options window's Release Of Information section has the Require Consent checkbox deselected, claims cannot be submitted via EDI. Need the ability to submit claims via EDI without a consent signature on file.

Enhancement: Now axiUm lets you submit claims without a signature on file (for release of information) as long as the state or federal laws allows this. In version 5010, the release of information checkbox in both the CLM and OI segments will display one of the following:

- Y - Patient Release on file is on.
- I - Patient Release on file is off, and the System Options window's Release Of Information section has the Require Consent checkbox deselected. This indicates consent is not on file and not required.

Note: In version 4010, it is always set to Y.

100733 - Selecting different group codes

Module: Transactions ~ Explanation of Benefits (EOB) Details window

Issue: When setting up a claim adjustment reason code (defined in Maintenance module - Insurance tab - Claim Adjustment Reason Codes icon), you can associate it to only one group code. Need the ability to select a different group code when viewing the claim adjustment reason code in the Explanation of Benefits (EOB) window.

Enhancement: Now the group code that you associate to the claim adjustment reason code is used as the default group code to display on the Explanation of Benefits (EOB) Details window. This window now displays a Group Code drop-down field (new) so that you can change the group code to something other than the default.

Current:
Using this window, you can now create multiple claim adjustment records for the *same* reason code, each associated to a *different* group code.
axiUm Release 5.00.02

EHR

82167 - Select Sites window’s scroll bar to start at top
Module: EHR ~ Select Sites window
Issue: When you open the Select Sites window (by going to EHR module - Tx History tab, and clicking the Site field (ellipsis), the vertical scroll bar defaults to the bottom of the window. Need this scroll bar to start at the top of the window.
Enhancement: Now the Select Sites window’s vertical scroll bar starts at the top of the window.

Patient Card

99403 - Add a cell phone number field
Module: Patient Card
Issue: In the Patient Info window - Personal tab - Telephone section, there is a need for a separate field specifically for cell numbers.
Enhancement: Now axiUm offers a Mobile# field (new).

Transactions

81094 - Kentucky Medicaid claims to display subscriber #
Module: Transactions ~ claim forms window
Issue: Need Kentucky Medicaid HCFA claim forms to print the subscriber number in field 9a, even if the patient is also covered by a non-Medicaid policy. Currently, axiUm prints the subscriber number when Kentucky Medicaid is the only claim used.
Enhancement: Now if the patient is using Kentucky Medicaid, axiUm prints the subscriber number in the HCFA claim form’s field 9a, regardless of whether they have other insurance or not.

X-Ray

98977 - New encryption with MiPacs Blocked
Module: X-Ray
Issue: The advanced encryption method (see 87795) is not compatible with MiPACS. Need axiUm to disallow encryption upgrades for those workstations using MiPACS.
Enhancement: The following scenarios will now cause an error message:
- Selecting the Use Advanced Encryption checkbox on workstations using MiPACS ('MiPACS' is found in the default), any workstation setting, or a Station Option template for any of the following:
  - Other | Imaging | Execute
  - Other | Imaging2 | Execute
  - Other | Xray | Execute

- Enabling the MiPACS Link Integration when Advanced Encryption checkbox is selected (adding MiPACS to the default, any workstation setting, or a Station Option template in the above areas).
104284, 104433 - **Mapping adjustment codes for 835 Remittance**

**Module:** Maintenance ~ Provider Level Adjustments window

**Issue:** Need a method for mapping the HIPPA Provider Level Adjustment Codes to an axiUm adjustment code.

**Enhancement:** In the Provider Level Adjustments window, here is now a Code field (ellipsis) (104284). Clicking this opens the Provider Level Adjustment Codes window (new) (104433). Use this window to map HIPPA Provider Level Adjustment Codes to axiUm adjustment codes. Also, in the Provider Level Adjustments window, the Provider Level Adjustment Codes section has been renamed to the Provider Level Adjustment section.
102828 - axiUm Patient Sign-In application renamed

**Module:** Patient Sign-In

**Issue:** Need to change the name of the axiUm Patient Sign-In application.

**Enhancement:** The axiUm Patient Sign-In application is now called the axiUm Kiosk application (changed).

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**Transactions**

104143 - Records to indicate reversals

**Module:** Transactions - Ins Pmt tab

**Issue:** In the Ins. Payment tab, the insurance payment records need to include reversed amounts.

**Enhancement:** Now the Applied column = Amount column + reversals.
111607 - Integration with Aycan

**Module:** X-Ray

**Problem:** Need axiUm to integrate with Aycan imaging software.

**Solution:** axiUm now integrates Aycan imaging software.