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This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Overdue Patients module.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

**Document Conventions**

This manual uses the following styles to identify the different interface elements:

| **Bold** | Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes. |
| **Italics** | Indicates when a special term is used for the first time, and to emphasize key words or terms. |
| **Monospace Fonts** | Data entered by the user. |
## Document Icons

This guide also uses the following icons to identify the different document elements:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>🚨</td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td>🍏</td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
# Table of Contents

*About this Guide* ........................................................................................................ iii

*Document Conventions* ........................................................................................ iii

*Document Icons* ....................................................................................................... iv

## Chapter 1: About Overdue Patients ................................................................. 1

  - Opening the Overdue Patients Module .......................................................... 1
  - About the Overdue Patients Window ........................................................... 3

## Chapter 2: Overdue Patients Setup ................................................................. 5

  - Setting up Overdue Patient Conditions ....................................................... 5
  - Setting up Overdue Extension Reasons ...................................................... 10
  - Setting up Messenger Events ..................................................................... 10

## Chapter 3: Using Overdue Patients ............................................................... 13

  - Searching Overdue Patients ....................................................................... 13
  - Granting Overdue Extensions ..................................................................... 14
    - Granting Extensions on a Specific Condition for a Patient ..................... 14
    - Granting Extensions on all Conditions for a Patient .............................. 17
    - Granting Extensions on Multiple Patients .............................................. 23
    - Granting Extensions Starting in the Future .............................................. 25
  - Regenerating Overdue Conditions on-Demand .......................................... 28
  - Printing Reports ......................................................................................... 29
The instructors can use the Overdue Patients module to:

- View overdue patients.
- Grant overdue extensions to patients.
- Print overdue patient reports.

The Overdue Patients module can send Messenger notifications to providers who have upcoming overdue patients. The Overdue Patients module is typically used by instructors to manage overdue patients.

This chapter covers the following topics:

- Opening the Overdue Patients module
- About the Overdue Patients window

Read the following sections to familiarize yourself with the features of the Overdue Patients module.

1 Opening the Overdue Patients Module

There are different methods to access the Overdue Patients module:

- Icon
- Actions menu
- Desktop

The following instructions describe these methods.
▼To open the Overdue Patients module using the icon:

Click (Overdue Patients).

▼To open the Overdue Patients module using the Actions menu:

From the Actions menu, click Overdue Patients.

▼To open the Overdue Patients module using the Desktop:

From the Desktop, click (Overdue Patients).

The next section describes the Overdue Patients module window.
2 About the Overdue Patients Window

This is how the Overdue Patients window may look when you open it for the first time:

You are now ready to begin using the Overdue Patients window.
This chapter covers the setup tasks you must complete before using the Overdue Patients module. You must have access rights (i.e., administrator access level) to access these windows.

This chapter covers the following topics:

- Setting up overdue patient conditions
- Setting up overdue extension reasons
- Setting up Messenger events

At the end of this chapter you will be familiar with these tasks.

### 1 Setting up Overdue Patient Conditions

Because overdue patient conditions causes Messenger events to occur, you must set up overdue patient conditions and the messages it sends to the providers involved.

▼To set up an overdue patient condition:

1. Go to Maintenance module's Patient tab.
2. Double-click the Overdue Conditions icon.

axiUm displays the Overdue Patient Conditions window. For information on the Overdue Patient Conditions window, refer to the axiUm Reference Manual for Maintenance and see Overdue Patient Conditions Window on page 569.
3. Highlight an item from the list view. For our example, we will select RCDUE.

4. Enter the fields and options. For our example, we will enter:
   
   - **Limit**: 30
   - **Period**: Calendar Days

   *Do not change the Function field. If you change the Function field, the function will not work. To add, edit, or delete a function, contact your axiUm support.*

5. Go to the Limit Msg field and click (ellipsis).
axiUm displays the Overdue Messages window. For information on the Overdue Messages window, refer to the axiUm Reference Manual for Maintenance and see *Overdue Messages Window* on page 573.

6. Enter the fields and options. For our example, we will enter:

- **Code**: RCDUE
- **Provider**: selected
- **Provider Group Leader**: selected
- **Patient Care Manager**: selected

7. Click (Add a new Record).

axiUm adds the new record to the list view.

8. Click (Close).

axiUm closes the Overdue Messages window and returns to the Overdue Patient Conditions window.

axiUm displays the new overdue message in the Limited Msg field.
9. Go to the **Extension Msg** field and click (ellipsis).

axiUm displays the Overdue Messages window. For information on the Overdue Messages window, refer to the axiUm Reference Manual for Maintenance and see *Overdue Messages Window* on page 573.

10. From the list view, select an item. For our example, we will select **RCDUE**.

11. Click (Close).

axiUm closes the Overdue Messages window and returns to the Overdue Patient Conditions window.

axiUm displays the new overdue message in the Extension Msg field.
12. Click  (Modify Record).

axiUm saves the changes in the overdue patient condition RCDUE.

13. Click  (Close).

axiUm closes the Overdue Patient Conditions window.

You have now successfully set up an overdue patient condition.
2 Setting up Overdue Extension Reasons

There will be times when an overdue patient condition requires an extension. For example, the patient is on a long-term sick leave. When you grant an overdue extension, you must specify the reason for this extension, for reporting purposes. To apply extension reasons to overdue patients, you must create overdue extension reasons.

▼To set up an overdue extension reason:

1. Go to Maintenance module's Patient tab.
2. Double-click the Overdue Extension Reasons icon.

axiUm displays the Overdue Extension Reasons window. For information on the Overdue Extension Reasons window, refer to the axiUm Reference Manual for Maintenance and see Overdue Extension Reasons Window on page 578.

3. For our example, we will keep the existing records and change nothing.
4. Click (Close).

axiUm closes the Overdue Extension Reasons window.

You have now successfully set up an overdue extension reason.

3 Setting up Messenger Events

When an overdue condition occurs or an overdue extension is granted, you want the providers to be notified of this in their Messenger module. Lack of Messenger setup may cause missed communications and the provider may miss overdue conditions that could affect their grades. Also, the patient may miss timely follow-ups that may cause their conditions to worsen.
To set up an overdue extension reason:

1. Go to Maintenance module's Office tab.
2. Double-click the Messenger Events icon.

axiUm displays the Messenger Events window. For information on the Messenger Events window, refer to the axiUm Reference Manual for Maintenance and see Messenger Events Window on page 425.

3. Highlight an item. For our example, we will select Patient Overdue Conditions.
4. Enter the fields and options. For our example, we will deselect the Inactive checkbox.
5. Click (Modify Record).

axiUm saves the changes.
6. Highlight another item. For our example, we will select Patient Overdue Extension.

7. Enter the fields and options. For our example, we will select the Inactive checkbox.

8. Click (Modify Record).

axiUm saves the changes.

9. Click (Close).

axiUm closes the Messenger Events window.

You have now successfully set up messenger events.
This chapter covers the tasks you can accomplish using the Overdue Patients module.

This chapter covers the following topics:

- Searching overdue patients
- Granting overdue extensions
- Printing reports

At the end of this chapter you will be familiar with these tasks.

1 Searching Overdue Patients

You can search for any type of overdue item by using the search fields in the Overdue Patients window.

This section explains how to search for various overdue items.

To search for an overdue patient:

1. Enter the search criteria. For our example, we will enter the following:
   - **Group**: All
   - **Reason**: RCDUE

   *In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

2. Click Search.
axiUm displays the search results in the Overdue Patients window’s list view.

You have now successfully found overdue patients.

2 Granting Overdue Extensions

This section covers the following tasks:

- Granting extensions on a specific condition for a patient
- Granting extensions on all conditions for a patient
- Granting extensions on multiple patients

This section explains how to grant various overdue extensions.

2.1 Granting Extensions on a Specific Condition for a Patient

You can grant an extension on a specific condition for a single patient. For example, there is no available appointments for the week that the patient is due.
To grant an extension on a specific condition for a patient:

1. In the Overdue Patients window, run a search.

   For instructions on searching overdue patients, see Searching Overdue Patients on page 13.

   axiUm displays the search results in the Overdue Patients window’s list view.

2. Highlight an item. For our example, we will select patient John Doe.

3. Click Extend.

   axiUm displays the Overdue Extensions window. For information on the Overdue Extensions window, refer to the axiUm Reference Manual for Overdue Patients and see Overdue Extensions Window on page 1.
4. Enter the fields and options. For our example, we will enter:

- **Extend Until**: 30/06/2011
- **Period**: Calendar Days
- **Reason**: Patient Out of Country

![Overdue Extensions](image)

💡 *In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

5. Click 🌟 *(Add a new Record)*.

axiUm adds the new record to the list view.
6. Click (Close).

axiUm closes the Overdue Extensions window and returns to the Overdue Patients window.

axiUm removes the patient from the list. Because the patient has been given an extension, they are no longer overdue.

You have now successfully granted an extension on this condition for the selected patient.

2.2 Granting Extensions on all Conditions for a Patient

In some cases, you may know that a patient record will become overdue. For example, the patient has left the country for an extended vacation. In such cases, you can grant an extension to a patient before their condition becomes overdue.
You can grant extensions on all conditions for a patient using one of the following methods:

- The Overdue Extensions window
- The Overdue Extensions (General) window

The Overdue Extensions window lets you grant extensions for a single condition for the selected patient, with the option to grant this extension to all other overdue conditions this patient may have. The Overdue Extensions (General) window lets you grant extensions for all patients’ overdue conditions in axiUm, with the option to grant this extension for only a select patient so that the grant is applied to all overdue conditions for this patient only.

The following sections cover these methods.

▼To grant an extension on all conditions for a patient using the Overdue Conditions window:

1. In the Overdue Patients window, run a search.

   For instructions on searching overdue patients, see Searching Overdue Patients on page 13.

   axiUm displays the search results in the Overdue Patients window’s list view.

2. Highlight an item. For our example, we will select patient John Doe.

3. Click Extend.
axiUm displays the Overdue Extensions window. For information on the Overdue Extensions window, refer to the axiUm Reference Manual for Overdue Patients and see *Overdue Extensions Window* on page 1.

4. Enter the fields and options. For our example, we will enter:

- **Extend Until**: 30/06/2011
- **Period**: Calendar Days
- **Reason**: Patient Out of Country
- **Apply to all Overdue Conditions for this Patient**: selected

*In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

5. Click (Add a new Record).

axiUm adds the new record to the list view.
You have now successfully granted an extension on all conditions for the selected patient.

To grant an extension on all conditions for a patient using the Overdue Conditions (General) window:

1. In the Overdue Patients window, run a search.

   For instructions on searching overdue patients, see Searching Overdue Patients on page 13.
axiUm displays the search results in the Overdue Patients window’s list view.

2. Highlight an item. For our example, we will select patient Jane Doe.

3. Click **General Ext**.

  axiUm displays the Overdue Extensions (General) window. For information on the Overdue Extensions (General) window, refer to the axiUm Reference Manual for Overdue Patients and see *Overdue Extensions (General) Window* on page 4.

4. Enter the fields and options. For our example, we will enter:
   - **Patient**: Doe, Jane
   - **Extend Until**: 30/06/2011
• **Period:** Calendar Days
• **Reason:** Patient Out of Country

*In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

5. Click ☑️ (Add a new Record).

axiUm adds the new record to the list view.

6. Click ✗ (Close).

axiUm closes the Overdue Extensions (General) window and returns to the Overdue Patients window.

axiUm removes the patient from the list. Because the patient has been given an extension, they are no longer overdue.

You have now successfully granted an extension on all conditions for the selected patient.
2.3 Granting Extensions on Multiple Patients

You can grant an extension on multiple patients and multiple conditions. For example, the institution will be closed for the winter holidays.

▶ To grant an extension on multiple patients:

1. In the **Overdue Patients** window, run a search.

   For instructions on searching overdue patients, see *Searching Overdue Patients* on page 13.

   axiUm displays the search results in the Overdue Patients window’s list view.

2. Highlight multiple items. For our example, we will select patient John Doe and Mary Doe.

3. Click **Extend**.

   axiUm displays the Overdue Extensions (for Multiple Patients) window. For information on the Overdue Extensions (for Multiple Patients) window, refer to the
4. Enter the fields and options. For our example, we will enter:

- **Extend Until**: 30/06/2012
- **Period**: Calendar Days
- **Reason**: Patient Out of Country

    ![Reason field reminder]

    *In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

5. Click **OK**.

axiUm closes the Overdue Extensions (for Multiple Patients) window and returns to the Overdue Patients window.

axiUm removes the two items from the list view. Because the patients have been given an extension, they are no longer overdue, and therefore removed from the Overdue Patients window.

![Overdue Patients window]

You have now successfully granted an extension on all conditions for all patients with overdue conditions.
2.4 Granting Extensions Starting in the Future

You can grant extensions with a future start date. For our example, we will assume today is June 30, 2011. A patient is going on holidays for three months starting January 1, 2012. You will add a extension starting January 1, 2012 and ending April 1, 2012. If you grant this future extension today, axiUm displays the patient in the Overdue Patients window as overdue but with a future extension (displayed in the Future Ext column of the list view). On January 1, 2012, axiUm no longer displays the patient in the Overdue Patients window. On April 1, 2012, when the extension expires, the patient becomes overdue again and axiUm displays them in the Overdue Patients window.

If you grant an extension with starting today, the patient is no longer overdue until the extension expires, and therefore does not show up in the Overdue Patients window until the extension expires.

▼To grant an extension with a future start date:

1. In the **Overdue Patients** window, run a search.

   For instructions on searching overdue patients, see *[Searching Overdue Patients](#)* on page 13.

   axiUm displays the search results in the Overdue Patients window’s list view.

2. Highlight multiple items. For our example, we will select patient Mary Doe.

3. Click **Extend**.
axiUm displays the Overdue Extensions window. For information on the Overdue Extensions window, refer to the axiUm Reference Manual for Overdue Patients and see Overdue Extensions Window on page 1.

4. Enter the fields and options. For our example, we will enter:

- **Date**: 01/01/2012
- **Extend Until**: 01/04/2012
- **Period**: Calendar Days
- **Reason**: Patient Out of Country

   *In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

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

6. Click  (Close).

axiUm saves the entries, closes the Overdue Extensions window, and returns to the Overdue Patients window.

axiUm saves the entries, closes the Overdue Extensions (for Multiple Patients) window, and returns to the Overdue Patients window.

axiUm displays the future start date for the extension you granted, in the Future Ext column.

You have now successfully granted an extension, starting at a future date, for this patient.
3 Regenerating Overdue Conditions on-Demand

During the overnight process, axiUm regenerates the statistics used to calculate overdue conditions. However, you can regenerate this on-demand. When you do this, axiUm appends the new items to the current list view.

▼To regenerate the overdue conditions list view:

1. In the Overdue Patients window, run a search.

For instructions on searching overdue patients, see Searching Overdue Patients on page 13.

axiUm displays the search results in the Overdue Patients window’s list view.

2. Click Regenerate.

axiUm displays the following message box:

3. Click Yes.
axiUm displays the following message box:

![Message Box]

4. Click **OK**.

axiUm appends any additional overdue conditions in the list view.

You have successfully regenerated the overdue patient conditions.

### 4 Printing Reports

You can only print lists displayed in the list view. For example, you can search for all overdue patients that are assigned to a specific provider, and print the search results.

Depending on your workstation setup, axiUm may display different print windows. Your workstation may default to the previously selected printer, including the folder you selected if you printed the report to file. Or you may be prompted to select a printer.
To print the Overdue Patients report:

1. Run a search. For our example, we will search for:
   - **Group:** All
   - **Reason:** All

   *In the Reason field, you can manually enter a reason not listed in the Overdue Extension Reasons window.*

For instructions on searching for overdue patients, see *Searching Overdue Patients* on page 13.

axiUm displays the search results in the Overdue Patients window’s list view.

2. Click **Print**.
axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

💡 You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

axiUm prints all displayed overdue patient conditions to the selected printer, similar to how they appear on the Overdue Patients window’s list view.

You have now successfully printed the Overdue Patients report.