Disclaimer:

This manual is licensed under the axiUm software and maintenance agreement. You may not use this manual except in compliance with the license. The information contained in these materials is proprietary and confidential to Exan and/or its subsidiaries or affiliates and is provided for the sole use of the individual or entity to whom it is addressed. These materials must be kept in the strictest confidence.

The contents of these materials are protected by federal and international intellectual property laws. The Exan logo is a registered trademark and is the sole and exclusive property of Exan.

These materials may contain third-party copyright and/or trademark materials, the use of which has not always been specifically authorized by the intellectual property owner. All copyrights and/or trademarks contained in these materials are the sole and exclusive property of their respective owners.

Information in this document is subject to change without notice. No portion of these materials may be reprinted, republished, modified, reproduced, sold, disseminated, disclosed or distributed in any form to any other party without the express written consent of Exan.

All names used in axiUm (whether online, in print, or any other media) are fictitious and are used herein for the purposes of example and demonstration on how to use axiUm. Any similarity to real people is a coincidence.

Copyright © 2011 Exan. All rights reserved.

Botan (http://botan.randombit.net/) is distributed under these terms:


Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

1. Redistributions of source code must retain the above copyright notice, this list of conditions, and the following disclaimer.

2. Redistributions in binary form must reproduce the above copyright notice, this list of conditions, and the following disclaimer in the documentation and/or other materials provided with the distribution.

This software is provided by the author(s) "as is" and any express or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose, are disclaimed. In no event shall the author(s) or contributor(s) be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this software, even if advised of the possibility of such damage.
# Table of Contents

About this Manual ........................................................................................................ iii

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

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

Chapter 1: Field Definitions ....................................................................................... 1

Add/Edit Evaluation Window ..................................................................................... 1
Evaluation Audit Window ......................................................................................... 4
Evaluation Comments for a specific grade Window ................................................. 5
Evaluation Comments Window ............................................................................... 6
Evaluations Window ................................................................................................. 7
  Evaluations Window - Evaluations Tab ............................................................... 11
  Evaluations Window - Grades Tab ................................................................... 11
  Evaluations Window - Periodic Evals Tab ......................................................... 11
  Evaluations Window - Unevaluated Tx Tab ....................................................... 12
  Evaluations Window - Unapproved Tx Tab ....................................................... 12
Evaluations Setup Window ...................................................................................... 13
Grading Types To Show Window ............................................................................ 14
Periodic Evaluation Window ................................................................................... 15
Select Evaluation to View Window ........................................................................ 16
View Evaluation Window ....................................................................................... 19
About this Manual

This axiUm Reference Manual will help you start using axiUm. It shows you how to:

- Follow document conventions.
- Familiarize yourself with the Evaluations module windows.
- Use the fields and options in various Evaluations module windows.

The examples in the axiUm Reference Manual 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 Reference Manual may look different from your axiUm setup.

Document Conventions

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

<table>
<thead>
<tr>
<th>Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</td>
</tr>
<tr>
<td><em>Italics</em></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace</strong></td>
<td>Data entered by the user.</td>
</tr>
<tr>
<td><strong>Fonts</strong></td>
<td></td>
</tr>
</tbody>
</table>
## 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>
This chapter defines all the interactive screen elements in the Evaluations module, such as:

- fields
- drop-down fields
- check boxes
- options
- list boxes
- list views

All the screen names that appear in the Evaluations module are listed in alphabetical order. Screens that are accessible through the Evaluations module may belong under a different module and are not shown in this document. For these field definitions, refer to another axiUm Reference Manual.

1 Add/Edit Evaluation Window

You can access this window by going to the Evaluations window and clicking the Add button, the Edit button, or the Resume button. For information on the Evaluations window, see *Evaluations Window* on page 7.

Use this window to add a new evaluation, edit an existing evaluation, or resume a held evaluation.
**ADD/EDIT EVALUATION WINDOW**

**Provider**  
This field indicates the ID of the provider you are evaluating.

Clicking (ellipsis) opens the Providers List window to select from. Only the names of students requiring evaluations are listed. In other words, for a user’s record, the Users window’s Provider tab’s Clinical section has the Grade drop-down field displaying the Sessional option or the Periodic option. For information on the Grade drop-down field, refer to the axiUm Reference Manual for Maintenance and see Clinical Section on page 512.

**Discipline**  
This drop-down field indicates the discipline of treatment being graded.

The options in this drop-down field are defined in the Treatment Disciplines window. For information on the Treatment Disciplines window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 87.

**Form**  
This drop-down field indicates the evaluation form used for grading the selected student.

The options in this drop-down field are defined in the Grading Forms window. For information on the Grading Forms window, refer to the axiUm Reference Manual for Maintenance and see Grading Forms Window on page 231.
ADD/EDIT EVALUATION WINDOW

Period
This drop-down field is shown if the Evaluations Setup window has the Track time utilization checkbox selected. For information on the Evaluations Setup window, see Evaluations Setup Window on page 13.

This drop-down field indicates the clinical session number, and displays the following options:

• 1: This option, if selected, indicates a morning session.
• 2: This option, if selected, indicates an afternoon session.
• 3: This option, if selected, indicates an evening session.

Date
This field indicates the date this evaluation was conducted and defaults to today's date. This date can be changed.

For example, if an instructor conducted an evaluation on paper, and later gave a clerical staff the hardcopy for entering the grades into axiUm, the clerical staff can select either the date the evaluations were conducted, or the date they were entered into axiUm.

Show Exam Forms
This checkbox is hidden if you access this window from the EHR module’s Tx History tab’s Add Student Eval right-click option. For information on the EHR module’s Tx History tab, refer to the axiUm Reference Manual for EHR and see Tx History Tab on page 50.

Selecting this checkbox disables the Competency checkbox and refreshes the list view to display only those evaluations created for exams. These evaluations are those displayed in the Grading Forms window with the Is Exam checkbox selected. For information on the Grading Forms window, refer to the axiUm Reference Manual for Maintenance and see Grading Forms Window on page 231.

Competency
This checkbox is enabled if the Show Exam Forms checkbox is deselected.

This checkbox, if selected, indicates that this evaluation is to be done as part of a competency exam.

Show Audit
This right-click option is shown if you are viewing this window in edit mode.

Selecting this right-click option displays the Evaluation Audit window. For information on the Evaluation Audit window, see Evaluation Audit Window on page 4.

Evaluator
This section indicates the type of user evaluating, and displays the following options:

• Instructor: This option, if selected, indicates that you are an instructor. Selecting this option enables the Instructor field.
• Provider: This option, if selected, indicates that you are a provider.

Instructor
This field is enabled if the Evaluator section has the Instructor option selected.

Selecting this option enables the Held For checkbox.

If you are an instructor, this field displays your name. You can select a different instructor.

Clicking (ellipsis) opens the Instructor List window to select from. For information on the Instructor List window, refer to the axiUm Reference Manual for Maintenance and see Instructor List Window on page 37.
**ADD/EDIT EVALUATION WINDOW**

<table>
<thead>
<tr>
<th>Held For</th>
<th>This checkbox is enabled if the Instructor option is selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This checkbox, if selected, indicates to hold this evaluation for another instructor to complete later.</td>
</tr>
<tr>
<td></td>
<td>Selecting this checkbox enables the field.</td>
</tr>
<tr>
<td></td>
<td>The field indicates the name of the instructor this evaluation is held for.</td>
</tr>
<tr>
<td></td>
<td>Clicking  (ellipsis) opens the Instructor List window to select from. For information on the Instructor List window, refer to the axiUm Reference Manual for Maintenance and see Instructor List Window on page 37.</td>
</tr>
<tr>
<td></td>
<td>Clicking  (delete) removes the currently selected instructor name from the field.</td>
</tr>
</tbody>
</table>

| Add another evaluation    | This checkbox, if selected, displays another evaluation form when you click the OK button. |

| Time (Hrs)                | This field indicates the length of time (in hours) that the selected provider spent performing the treatment you are evaluating. |

| Total RVU                 | This disable field is an axiUm-calculated RVU/CPV score given to students upon successful completion of a treatment, and is associated to the procedure performed. |
|                          | The RVU/CPV value for a procedure code is defined in the Procedure Code window’s Clinical Section’s RVU/CPV field. For information on the Procedure Code window’s Clinical section, refer to the axiUm Reference Manual for Maintenance and see Clinical Section on page 62. |

| OK                        | Clicking this button saves the entries and closes the Add/Edit Evaluation window. |

| Cancel                    | Clicking this button cancels any entries and closes the Add/Edit Evaluation window. |

## 2 Evaluation Audit Window

You can access this window by:

- Going to the View Evaluation window and selecting the Show Audit right-click option. For information on the View Evaluation window, see View Evaluation Window on page 19.
- Going to the Add/Edit Evaluation window (in edit mode) and clicking selecting the Show Audit right-click option. For information on the Add/Edit Evaluation window, see Add/Edit Evaluation Window on page 1.

Use this window to view the original grade entered for the selected evaluation question.
You can access this window by going to the View Evaluation window and double-clicking on a question.

Use this window to add comments regarding a specific grade given for a specific evaluation question.

<table>
<thead>
<tr>
<th>Date</th>
<th>This disabled field indicates the date this evaluation form was added to the selected provider’s record.</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>This disabled field indicates the name of the instructor who is evaluating the selected provider.</td>
</tr>
<tr>
<td>Question</td>
<td>This first disabled field indicates the question selected to view. The second disabled field indicates the grade given for the evaluation question displayed in the first disabled field.</td>
</tr>
<tr>
<td>Close</td>
<td>Clicking this button closes the Evaluation Audit window.</td>
</tr>
</tbody>
</table>

3 Evaluation Comments for a specific grade Window

You can access this window by going to the View Evaluation window and double-clicking on a question.

Use this window to add comments regarding a specific grade given for a specific evaluation question.

<table>
<thead>
<tr>
<th>Date</th>
<th>This disabled field indicates the date this evaluation form was added to the selected provider.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>This disabled field indicates the name of the instructor who is evaluating the selected provider.</td>
</tr>
</tbody>
</table>
Evaluation Comments Window

You can access this window by going to the Add/Edit Evaluation window, selecting a question of type Comment, and double-clicking on it.

Use this window to enter general comments. These are general comments and are not specific to any particular question or grade.

Evaluation Comments Window

<table>
<thead>
<tr>
<th>Question</th>
<th>This disabled field indicates the question on the evaluation form you are answering.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td>This disabled field indicates the grade you entered for the selected evaluation question.</td>
</tr>
<tr>
<td>Comments</td>
<td>This text box indicates the free-form text answer to the question displayed in the Question field.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves your entry and closes the Evaluation Comments for a specific grade window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels your entry and closes the Evaluation Comments for a specific grade window.</td>
</tr>
</tbody>
</table>

4 Evaluation Comments Window

You can access this window by going to the Add/Edit Evaluation window, selecting a question of type Comment, and double-clicking on it.

Use this window to enter general comments. These are general comments and are not specific to any particular question or grade.

Evaluation Comments for a specific Grade Window

<table>
<thead>
<tr>
<th>Date</th>
<th>This disabled field indicates the date this evaluation form was added to the selected provider.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>This disabled field indicates the name of the instructor who is evaluating the selected provider.</td>
</tr>
<tr>
<td>[text box]</td>
<td>This text box indicates any free-form comments.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves your entry and closes the Evaluation Comments window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels your entry and closes the Evaluation Comments window.</td>
</tr>
</tbody>
</table>
5 Evaluations Window

This is the main Evaluations module window.

You can access this window by:

- Clicking (Evaluations) from the axiUm main screen icons.
- Clicking the Patient Attachment option from the Actions menu.
- Clicking (Evaluations) from the Desktop.

Use this window for all student assessments.
## Evaluations Window

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
<td>This field indicates the provider for the search criteria. If you are a student, axiUm automatically displays your provider ID. Clicking 🔄 (ellipsis) opens the Providers List window to select from. Only the names of students requiring evaluations are listed. In other words, for a user’s record, the Users window’s Provider tab’s Clinical section has the Grade drop-down field displaying the Sessional option or the Periodic option. For information on the Grade drop-down field, refer to the axiUm Reference Manual for Maintenance and see Clinical Section on page 512.</td>
</tr>
<tr>
<td><strong>Instructor</strong></td>
<td>This field is enabled in the following tabs: Evaluations tab, Grades tab, Periodic Evals tab, Unevaluated Tx tab. This field indicates the instructor for the search criteria. This is the name of the instructor who evaluated the student displayed in the Provider field. If you are an instructor, axiUm automatically displays your provider ID in this field. Clicking 🔄 (ellipsis) opens the Instructor List window to select from. For information on the Instructor List window, refer to the axiUm Reference Manual for Maintenance and see Instructor List Window on page 37. Clicking ✗ (delete) removes the currently selected instructor name from the field.</td>
</tr>
<tr>
<td><strong>Approved</strong></td>
<td>This field is displayed in the Periodic Evals tab. This field indicates that students are awaiting evaluation from this approval instructor. axiUm filters the search based on this instructor who has outstanding evaluations to approve. Clicking 🔄 (ellipsis) opens the Instructor List window to select from. For information on the Instructor List window, refer to the axiUm Reference Manual for Maintenance and see Instructor List Window on page 37. Clicking ✗ (delete) removes the currently selected instructor name from the field.</td>
</tr>
<tr>
<td><strong>Discipline</strong></td>
<td>This drop-down field is enabled in the following tabs: Evaluations tab, Grades tab. This drop-down field indicates the discipline for the search criteria. axiUm filters the search based on this discipline. The options in this drop-down field are defined in the Treatment Disciplines window. For information on the Treatment Disciplines window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 87.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>This field is enabled in the following tabs: Evaluations tab, Grades tab. This field indicates the evaluation type for the search criteria. Clicking 🔄 (ellipsis) opens the Grading Types To Show window. For information on the Grading Types To Show window, see Grading Types To Show Window on page 14.</td>
</tr>
</tbody>
</table>
**EVALUATIONS WINDOW**

**Date From**
This field indicates the starting date range for the search criteria.

In the **Evaluations** tab and the **Grades** tab, this is the date the evaluation was performed. In the **Period Eval**s tab, this is the date of instructor-student contact. In the **Unevaluated Tx** tab and the **Unapproved Tx** tab, this is the treatment date.

**Date To**
This field indicates the ending date range for the search criteria.

In the **Evaluations** tab and the **Grades** tab, this is the date the evaluation was performed. In the **Period Eval**s tab, this is the date of instructor-student contact. In the **Unevaluated Tx** tab and the **Unapproved Tx** tab, this is the treatment date.

**Form**
This drop-down field is enabled in the following tabs: **Evaluations** tab, **Grades** tab.

This drop-down field indicates the evaluation form for the search criteria. axiUm filters the search based on a specific type of grading form.

The options in this drop-down field are defined in the **Grading Forms** window. For more information on the **Grading Forms** window, refer to the axiUm Reference Manual for Maintenance and see **Grading Forms Window** on page 231.

**Grade**
This field is available and enabled in the following tabs: **Evaluations** tab, **Grades** tab.

This field is available but disabled in the following tabs: **Unevaluated Tx** tab, **Unapproved Tx** tab.

This field indicates a grade for the search criteria. axiUm filters the search based on a specific grade entered in the evaluation form.

**Contacts**
This field is available in the **Periodic Evals** tab.

This field indicates the number of instructor-student contacts that were made over the course of an evaluation. axiUm searches for records that meet or surpass this number.

**Search**
Clicking this button begins the search process.

**Add**
This field is enabled in the following tabs: **Evaluations** tab, **Grades** tab, **Periodic Evals** tab, **Unevaluated Tx** tab.

Clicking this button from the **Evaluations** tab, **Grades** tab, or the **Unevaluated Tx** tab displays the **Add/Edit Evaluation** window to edit the selected evaluations record. For more information on the **Add/Edit Evaluation** window, see **Add/Edit Evaluation Window** on page 1.

Clicking this button from the **Periodic Evals** tab displays the **Periodic Evaluation** window. For more information on the **Periodic Evaluation** window, see **Periodic Evaluation Window** on page 15.

**Edit**
This button is enabled in the following tabs: **Evaluations** tab, **Grades** tab.

Clicking this button displays the **Add/Edit Evaluation** window to edit the selected evaluations record. For more information on the **Add/Edit Evaluation** window, see **Add/Edit Evaluation Window** on page 1.

**View**
This button is enabled in the following tabs: **Evaluations** tab, **Grades** tab.

Clicking this button displays the **View Evaluation** window. For more information on the **View Evaluation** window, see **View Evaluation Window** on page 19.
<table>
<thead>
<tr>
<th><strong>EVALUATIONS WINDOW</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print</strong></td>
</tr>
<tr>
<td>Clicking this button prints the records in the list view to the default printer.</td>
</tr>
<tr>
<td><strong>Resume</strong></td>
</tr>
<tr>
<td>Clicking this button displays the <em>Add/Edit Evaluation</em> window to edit the selected evaluations record. For information on the <em>Add/Edit Evaluation</em> window, see <em>Add/Edit Evaluation Window</em> on page 1.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
</tr>
</tbody>
</table>
| This button is enabled in the *Evaluations* tab.  
Clicking this button deletes the selected record from the list view. |
| **Setup**                |
| Clicking this button displays the *Evaluations Setup* window. For information on the *Evaluations Setup* window, see *Evaluations Setup Window* on page 13. |
| **Special Assessment**   |
| This checkbox is enabled in the *Periodic Evals* tab.  
Special assessment refers to a periodic evaluation under special circumstances.  
This checkbox, if selected, lets the instructor grade the student without removing the student's name from the list of students requiring a periodic grade. |
| **Tx Specific Only**     |
| This checkbox enabled in the *Grades* tab.  
This checkbox, if selected, restricts the search to those grades given to specific treatments rather than general student performance. |
| **Show Deleted Items**   |
| This checkbox is enabled in the following tabs: *Evaluations* tab, *Grades* tab.  
This checkbox, if selected, includes deleted evaluation records in the search. Deleted records are displayed in the list view in gray text. |
| **Show**                 |
| This drop-down field indicates the different types of evaluations and their status, and displays the following options:  
  • *Instructor (Complete)*: This option, if selected, indicates to lists evaluations that are completed by an instructor.  
  • *Instructor (Held)*: This option, if selected, indicates to lists evaluations that are held for the specified instructor. Selecting this option enables the *Held For* field.  
  • *Instructor (All)*: This option, if selected, indicates to lists evaluations that are both complete and held.  
  • *Self Evaluations*: This option, if selected, indicates to lists evaluations that students entered themselves. axiUm searches for all instructors associated to self-evaluations, regardless of what is displayed in the *Instructor* field. |
| **Held For**             |
| This checkbox is enabled if the *Show* drop-down field displays the *Instructor (Held)* option.  
If you are an instructor, this field defaults to your name.  
Clicking  (ellipsis) opens the *Instructor List* window to select from.  
Clicking  (delete) removes the currently selected instructor name from the field. |
5.1 Evaluations Window - Evaluations Tab

This tab is used to search for, review, and edit existing evaluations.

5.2 Evaluations Window - Grades Tab

This tab lists existing sessional evaluations and self-evaluations.

5.3 Evaluations Window - Periodic Evals Tab

This tab lists existing period evaluations only.
5.4 Evaluations Window - Unevaluated Tx Tab

This tab displays unevaluated treatments. Instructors can find approved treatments that require an evaluation. Clerical staff can enter an instructor’s completed hardcopy evaluation into axiUm.

5.5 Evaluations Window - Unapproved Tx Tab

All treatment that has been entered but not approved will be listed here.
6 Evaluations Setup Window

You can access this window by going to the Evaluations window and clicking the Setup button. For information on the Evaluations window, see Evaluations Window on page 7.

Use this window to set up the behavior of the Evaluations module.
**Evaluations Setup Window**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track time utilization</td>
<td>This checkbox, if selected, indicates to track clinical sessions. Selecting this checkbox displays the <em>Period</em> drop-down field in the <em>Add/Edit Evaluations</em> window. For information on the <em>Add/Edit Evaluations</em> window, see <em>Add/Edit Evaluation Window</em> on page 1.</td>
</tr>
<tr>
<td>Auto capitalize grading answers</td>
<td>This checkbox, if selected, displays all characters you enter in evaluation forms using upper case, even if you turn off the CAPS LOCK key on your keyboard. This checkbox, if deselected, displays all characters as set on your keyboard.</td>
</tr>
<tr>
<td>Do not ask to print grade card</td>
<td>This checkbox, if selected, indicates that when you complete an evaluation, axiUm hides the <em>Print Grade Question</em> window and does not ask if you want to print the grade card. This checkbox, if deselected, indicates that axiUm displays the <em>Print Grade Question</em> window each time you complete an evaluation.</td>
</tr>
<tr>
<td>Optionally evaluate on Patient Approvals</td>
<td>This checkbox, if selected, indicates that when you approve a treatment, you can delay the session evaluation until later on. This checkbox, if selected, indicates that when you approve a treatment, you must perform a sessional evaluation at the time.</td>
</tr>
<tr>
<td>Use approval user’s security settings</td>
<td>This checkbox, if selected, indicates to use the current user's security settings. This checkbox, if deselected, indicates that axiUm uses the instructor's settings for the treatment. This is often used if the workstation is used by staff to later enter grades for students in the <em>Unevaluated Tx</em> tab on the instructor's behalf.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the selections and closes the <em>Evaluations Setup</em> window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any selections and closes the <em>Evaluations Setup</em> window.</td>
</tr>
</tbody>
</table>

### 7 Grading Types To Show Window

You can access this window by going to the Evaluations window’s *Type* field and clicking (ellipsis). For information on the Evaluations window, see *Evaluations Window* on page 7.
Periodic Evaluation Window

**Grading Types To Show Window**

<table>
<thead>
<tr>
<th>Type</th>
<th>This list box displays the types of evaluation available to view. These options are hard-coded in axiUm and are not user-defined. Highlighting an item from the list box selects it.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Clicking this button saves the selections and closes the Grading Types To Show window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any selections and closes the Grading Types To Show window.</td>
</tr>
</tbody>
</table>

8 Periodic Evaluation Window

You can access this window by going to the Evaluations window’s Periodic Evals tab and clicking the Add button. For information on the Evaluations window’s Periodic Evals tab, see *Evaluations Window - Periodic Evals Tab* on page 11.

**Periodic Evaluation Window**

Student  This disabled field displays the name of the student you are evaluating.
PERIODIC EVALUATION WINDOW

Date          This field indicates the date this evaluation was conducted and defaults to today's date. This date can be changed.

For example, if an instructor conducted an evaluation on paper, later gave a clerical staff the papers to enter the grades into axiUm, the clerical staff can select either the date the evaluations were conducted, or the date they were entered into axiUm.

Form          This drop-down field indicates the evaluation form used for grading the selected student. The options in this drop-down field are defined in the Grading Forms window. For information on the Grading Forms window, refer to the axiUm Reference Manual for Maintenance and see Grading Forms Window on page 231.

OK            Clicking this button saves the entries and closes the Periodic Evaluation window.

Cancel        Clicking this button cancels any entries and closes the Periodic Evaluation window.

View Other    Clicking this button displays the Select Evaluation to View window. For information on the Select Evaluation to View window, see Select Evaluation to View Window on page 16.

9 Select Evaluation to View Window

You can access this window by going to the Add/Edit Evaluation window and clicking the View Other button. For information on the Add/Edit Evaluation window, see Add/Edit Evaluation Window on page 1.

Use this window to search and view grades from previous evaluations (periodic or sessional) that the selected student has on record.
### Select Evaluation to View Window

**Selection Criteria**

This section indicates the criteria for the search, and displays the following options:

- **Current instructor**: This option, if selected, searches for the currently logged on instructor.
- **All instructors**: This option, if selected, searches all instructors that meet the search criteria.
- **Self Evaluations**: This option, if selected, searches only self-evaluation forms regardless of the instructor associated to it.

**Current patient**

This option is enabled if the **All treatments** option is selected.

This option, if selected, indicates to search evaluation records for this provider that is associated to the currently selected patient.

**All patients**

This option is enabled if the **All treatments** option is selected.

This option, if selected, indicates to search evaluation records for this provider that is associated to all patients.
SELECT EVALUATION TO VIEW WINDOW

Current treatments

This option is enabled if you are currently viewing a sessional evaluation.

This option is disabled if you are currently viewing a periodic evaluation or a self-evaluation.

This option, if selected, indicates to search evaluation records for the currently selected treatment.

All treatments

This option is enabled if you are currently viewing a sessional evaluation.

This option is disabled if you are currently viewing a periodic evaluation or a self-evaluation.

This option, if selected, indicates to search evaluation records for all treatments.

Selecting this treatment enables the Current patient option and the All patients option.

List for

This drop-down field indicates the date range for the search, and displays the following options:

- Last 30 days: axiUm searches records in the last 30 days.
- Last 6 months: axiUm searches records in the last six months.
- Last year: axiUm searches records in the past year.
- ALL: axiUm searches all existing records.

Discipline

This drop-down field indicates the discipline of treatment being graded.

The options in this drop-down field are defined in the Treatment Disciplines window. For information on the Treatment Disciplines window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 87.

Form

This drop-down field indicates the evaluation form used for grading the selected student.

The options in this drop-down field are defined in the Grading Forms window. For information on the Grading Forms window, refer to the axiUm Reference Manual for Maintenance and see Grading Forms Window on page 231.

View

Clicking this button displays the View Evaluation window displaying the details of the evaluation record highlighted in the list view. For information on the View Evaluation window, see View Evaluation Window on page 19.

Close

Clicking this button closes the Select Evaluation to View window.

Search

Clicking this button begins the search process.
10 View Evaluation Window

You can access this window by:

- Going to the Evaluations window and clicking the View button. For information on the Evaluations window, see Evaluations Window on page 7.
- Going to the Select Evaluation to View window and clicking the View button. For information on the Select Evaluations to View window, see Select Evaluation to View Window on page 16.

Use this window to view an evaluation window. You cannot edit the details of this window.

**VIEW EVALUATION WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>This static field indicates the ID of the provider who was evaluated.</td>
</tr>
<tr>
<td>Discipline</td>
<td>This static field indicates the discipline of treatment that was graded.</td>
</tr>
<tr>
<td>Form</td>
<td>This static field indicates the evaluation form used for grading the selected student.</td>
</tr>
<tr>
<td>Date</td>
<td>This disabled field indicates the date this evaluation was conducted.</td>
</tr>
<tr>
<td>Show Audit</td>
<td>Selecting this right-click option displays the Evaluation Audit window. For information on the Evaluation Audit window, see Evaluation Audit Window on page 4.</td>
</tr>
<tr>
<td>Competency</td>
<td>This disabled checkbox, if selected, indicates that this evaluation was performed as part of a competency exam.</td>
</tr>
</tbody>
</table>
### View Evaluation Window

| **Evaluator** | This disabled section indicates the type of user who evaluated the provider, and displays the following options:
| | • *Instructor:* This disabled option, if selected, indicates that an instructor performed this evaluation.
| | • *Provider:* This disabled option, if selected, indicates that a provider performed this evaluation. |
| **Instructor** | This disabled field displays the name of the instructor who evaluated the selected provider. |
| **Held For** | This disabled checkbox, if selected, indicates that this evaluation is held for another instructor to complete later.
| | The disabled field indicates the name of the instructor this evaluation is held for. |
| **Time (Hrs)** | This field indicates the length of time (in hours) that the selected provider spent performing the treatment you are evaluating. |
| **Total RVU** | This disable field is an axiUm-calculated RVU/CPV score given to students when they completed this treatment. |
| **Print** | Clicking this button prints this evaluation to the default printer. |
| **Preview** | Clicking this button lets you preview this evaluation. |
| **Previous** | This button is available if you are viewing this window from the Select Evaluation to View window. For information on the Select Evaluation to View window, see Select Evaluation to View Window on page 16. 
| | Clicking this button displays the previous evaluation displayed in the Select Evaluation to View window's list view. |
| **Next** | This button is available if you are viewing this window from the Select Evaluation to View window. For information on the Select Evaluation to View window, see Select Evaluation to View Window on page 16. 
| | Clicking this button displays the next evaluation displayed in the Select Evaluation to View window's list view. |