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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 Patient Assignments module windows.
- Use the fields and options in various Patient Assignments 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><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></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 Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
Document Icons

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

- ![Pencil](icon1.png)
  Notes and helpful information. For example, things that will become apparent later on in the procedure.

- ![Exclamation Mark](icon2.png)
  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.

- ![Light Bulb](icon3.png)
  Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.

- ![Warning](icon4.png)
  Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.

- ![Apple](icon5.png)
  Challenges and extra steps. For example, steps that take you beyond the basic procedures.
1 Field Definitions

This chapter defines all the interactive screen elements in the Patient Assignments module, such as:

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

All the screen names that appear in the Patient Assignments module are listed in alphabetical order. Screens that are accessible through the Patient Assignments 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 Overdue Reasons Window

You can access this window by going to the Patient Assignments window and clicking the OverDue button. For information on the Patient Assignments window, see Patient Assignments Window on page 6.

Use this window to view all currently overdue items for a selected patient. This helps you determine whether the currently assigned provider is the best option for this patient, and whether assigning another provider with overdue treatments will better match.
2 Patient Assignments Setup Window

You can access this window by going to the Patient Assignments window and clicking the Setup button. For information on the Patient Assignments window, see Patient Assignments Window on page 6.

Use this tab to set up display settings for the Patient Assignments window.
### Patient Assignments Setup Window

<table>
<thead>
<tr>
<th>Assignment Based On</th>
<th>This section indicates the option that axiUm defaults to in the Patient Assignments window’s Request Type drop-down field. This section displays the following options:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <em>Patient Need Codes</em>: This option, if selected, indicates to default the Request Type drop-down field to display the Patient Need option.</td>
</tr>
<tr>
<td></td>
<td>• <em>General Tx Codes</em>: This option, if selected, indicates to default the Request Type drop-down field to display the General Tx option.</td>
</tr>
<tr>
<td></td>
<td>• <em>Tx Procedure Codes</em>: This option, if selected, indicates to default the Request Type drop-down field to display the Tx Procedure option.</td>
</tr>
</tbody>
</table>

For information on the Patient Assignments window, see *Patient Assignments Window* on page 6.

| Search On | This drop-down field indicates the default patient status to use in the patient search. The options in this drop-down field are defined in the Status Codes window. For information on the Status Codes window, refer to the axiUm Reference Manual for Maintenance and see *Status Codes Window* on page 18. |

| When Assigned | This drop-down field indicates that when a provider is assigned to a patient, axiUm changes the patient’s status to the one selected here. The options in this drop-down field are defined in the Status Codes window. For information on the Status Codes window, refer to the axiUm Reference Manual for Maintenance and see *Status Codes Window* on page 18. |

| OK | Clicking this button saves the entries and closes the Patient Assignments Setup window. |

| Cancel | Clicking this button cancels any entries and closes the Patient Assignments Setup window. |

### 3 Patient Assignment Confirmation Window

You can access this window by matching a provider’s unassigned academic needs with a patient’s unfulfilled treatment need.
3.1 Patient Assignment Confirmation Window - Unassigned Requests Tab

Use this tab to view all of the selected provider’s unassigned requests.

Selecting a checkbox matches this provider’s academic need to a patient’s treatment need.
3.2 Patient Assignment Confirmation Window - Patient Need Tab

Use this tab to list all needs associated to the selected patient.

Selecting a checkbox matches this patient’s need to a provider’s academic need.

3.3 Patient Assignment Confirmation Window - Planned Tx Tab

Use this tab to list all planned treatments associated to the selected patient.

Selecting a checkbox matches this patient’s planned treatment to a provider’s academic need.

3.4 Patient Assignment Confirmation Window - General Tx Tab

Use this tab to list all general procedures associated to the selected patient.

Selecting a checkbox matches this patient’s general treatment to a provider’s academic need.
4 Patient Assignments Window

You can access this window by:

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

Use this window for managing patient-provider assignments.

This window is divided into two sections. The top section displays information about the provider, and the lower section displays information about the patient. You can run a separate search for each section.
### Patient Assignments Window

**Provider**
- This field indicates the provider for the search criteria, and defaults to the currently logged-on provider.
- Clicking ... (ellipsis) opens the Providers List window to select from.

**Prov. Group**
- This drop-down field indicates the provider group for the search criteria.
- The options in this drop-down field are defined in the Provider Group Codes window. For information on the Provider Group Codes window, refer to the axiUm Reference Manual for Maintenance and see Provider Group Codes Window on page 450.

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

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

**Request Type**
- This drop-down field indicates the type of need for the search criteria.
- This drop-down field displays the following options:
  - Patient Need: The need being entered is for a patient's need.
  - General Tx: The need being entered is a general treatment.
  - Tx Procedure: The need being entered is for a specific treatment.
- The default option is defined in the Patient Assignments Setup window's Assignment Based On section. For information on the Patient Assignments Setup window, see Patient Assignments Setup Window on page 2.

**Code**
- This field indicates the need code for the search criteria.
- Clicking ... (ellipsis) opens the Need Codes window. For information on the Need Codes window, refer to the axiUm Reference Manual for Maintenance and see Need Codes Window on page 562.

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

**Delete**
- Clicking this button deletes the highlighted item in the list view.

**Print**
- Clicking this button prints the highlighted item in the list view to the default printer.

**Setup...**
- Clicking this button opens the Patient Assignments Setup window. For information on the Patient Assignments Setup window, see Patient Assignments Setup Window on page 2.

**Unassigned Requests**
- For information on the Unassigned Requests tab, see Patient Assignments Window - Unassigned Requests Tab on page 9.

**Assigned Requests**
- For information on the Assigned Requests tab, see Patient Assignments Window - Assigned Requests Tab on page 9.

**Patient Assignments**
- For information on the Patient Assignments tab, see Patient Assignments Window - Patient Assignments Tab on page 10.
### Patient Assignments Window

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td>Selecting this option shows the Need Summary tab and the code field. axiUm hides the Patient tab, the Patient Need tab, the Planned Tx tab, and the General Tx tab. Selecting this option indicates to display a summary of the search results.</td>
</tr>
<tr>
<td><strong>Details</strong></td>
<td>Selecting this option shows the Patient tab, the Patient Need tab, the Planned Tx tab, and the General Tx tab; and hides the Need Summary tab. axiUm also enables the Criteria button. Selecting this option indicates to display a details of the search results.</td>
</tr>
<tr>
<td><strong>Code</strong></td>
<td>This field is shown if the Summary option is selected. This disabled field indicates the code displayed in the first Code field.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Clicking this button begins the search process.</td>
</tr>
<tr>
<td><strong>Criteria</strong></td>
<td>This button is enabled if the Detail option is selected. Clicking this button opens the Select Report window. For information on the Select Report window, refer to the axiUm Reference Manual for Info Manager and see <strong>Select Report Window</strong> on page 68.</td>
</tr>
<tr>
<td><strong>OverDue...</strong></td>
<td>Clicking this button opens the Overdue Reasons window. For information on the Overdue Reasons window, see <strong>Overdue Reasons Window</strong> on page 1.</td>
</tr>
<tr>
<td><strong>Details...</strong></td>
<td>Clicking this button opens the Patient Plan Details window. For information on the Patient Plan Details window, see <strong>Patient Plan Details Window</strong> on page 12.</td>
</tr>
<tr>
<td><strong>Pt Card...</strong></td>
<td>Clicking this button opens the Patient Card window for the current patient.</td>
</tr>
<tr>
<td><strong>Assign...</strong></td>
<td>Clicking this button opens the Provider Assignments window. For information on the Provider Assignments window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <strong>Provider Assignments Window</strong> on page 133.</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>Clicking this button prints the records in the current list view to the default printer.</td>
</tr>
<tr>
<td><strong>Need Summary</strong></td>
<td>For information on the Need Summary tab, see <strong>Patient Assignments Window - Need Summary Tab</strong> on page 10.</td>
</tr>
<tr>
<td><strong>Patient</strong></td>
<td>This tab is displayed if the Detail option is selected. For information on the Patient tab, see <strong>Patient Assignments Window - Patient Tab</strong> on page 10.</td>
</tr>
<tr>
<td><strong>Patient Need</strong></td>
<td>This tab is displayed if the Detail option is selected. For information on the Patient Need tab, see <strong>Patient Assignments Window - Patient Need Tab</strong> on page 11.</td>
</tr>
<tr>
<td><strong>Planned Tx</strong></td>
<td>This tab is displayed if the Detail option is selected. For information on the Planned Tx tab, see <strong>Patient Assignments Window - Planned Tx Tab</strong> on page 11.</td>
</tr>
</tbody>
</table>
4.1 Patient Assignments Window - Unassigned Requests Tab

This tab displays a list of all outstanding provider requests.

4.2 Patient Assignments Window - Assigned Requests Tab

This tab displays a list of requests that have been fulfilled by an assignment.
### 4.3 Patient Assignments Window - Patient Assignments Tab

This tab displays a list of patients assigned to a provider.

![Patient Assignments Window](image)

### 4.4 Patient Assignments Window - Need Summary Tab

This tab displays a list of patient needs in summarized format.

![Need Summary](image)

### 4.5 Patient Assignments Window - Patient Tab

Use this tab to list all patients waiting to be assigned to providers.
4.6 Patient Assignments Window - Patient Need Tab

Use this tab to list all needs associated to the selected patient.

4.7 Patient Assignments Window - Planned Tx Tab

Use this tab to list all planned treatments associated to the selected patient.
### 4.8 Patient Assignments Window - General Tx Tab

Use this tab to list all general procedures associated to the selected patient.

![Image](image.png)

**Patient Assignments Window - General Tx Tab**

| [right-click] | Right-clicking on a record displays the Report Definition window. For information on the Report Definition window, axiUm Reference Manual for Info Manager and see Report Definition Window on page 57. |

### 5 Patient Plan Details Window

You can access this window by going to the Patient Assignments window and clicking the Details button. For information on the Patient Assignments window, see Patient Assignments Window on page 6.

Use this window to view the details of a selected patient need record.
**Patient Plan Details Window**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This disabled field indicates the name of the patient associated to the selected patient need record.</td>
</tr>
<tr>
<td>Print</td>
<td>Clicking this button prints the records in the current list view to the default printer.</td>
</tr>
<tr>
<td>Planned Tx</td>
<td>For information on the Planned Tx tab, see Patient Plan Details Window - Planned Tx Tab on page 13.</td>
</tr>
<tr>
<td>General Tx</td>
<td>For information on the General Tx tab, see Patient Plan Details Window - General Tx Tab on page 14.</td>
</tr>
<tr>
<td>Patient Need</td>
<td>For information on the Patient Need tab, see Patient Plan Details Window - Patient Need Tab on page 14.</td>
</tr>
</tbody>
</table>

### 5.1 Patient Plan Details Window - Planned Tx Tab

Use this tab to view a list of all planned procedures for the selected patient.
5.2 Patient Plan Details Window - General Tx Tab

Use this tab to view a list of all general procedures for the selected patient.

5.3 Patient Plan Details Window - Patient Need Tab

Use this tab to view a list of all needs for the selected patient.
6 Provider Assignment Preview Window

You can access this window by going to the Patient Assignments window’s Unassigned tab and selecting the Show Assignments right-click option. For information on the Patient Assignments window’s Unassigned tab, see Patient Assignments Window - Unassigned Requests Tab on page 9.

Use this window to view all patients currently assigned to the selected provider.
7 Provider Plan Details Window

You can access this window by going to the Patient Assignments window’s Unassigned tab and selecting the Show Tx History right-click option. For information on the Patient Assignments window’s Unassigned tab, see Patient Assignments Window - Unassigned Requests Tab on page 9.

Use this window to view the workload of a selected provider.

---

**PROVIDER ASSIGNMENT PREVIEW WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
<td>The first disabled field indicates the provider ID of the selected provider.</td>
</tr>
<tr>
<td></td>
<td>The second disabled field indicates the name of the selected provider.</td>
</tr>
<tr>
<td><strong>Need Code</strong></td>
<td>The first disabled field indicates the need code requested by the selected provider.</td>
</tr>
<tr>
<td></td>
<td>The second disabled field indicates the description of the need code displayed in the first field.</td>
</tr>
<tr>
<td></td>
<td>The third disabled field indicates the number of requests made by the selected provider, for the need code displayed in the first field.</td>
</tr>
<tr>
<td><strong>Existing Assignments</strong></td>
<td>This list view displays existing assignments for the selected provider.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>The first disabled field indicates the total number of patients assigned to the selected provider.</td>
</tr>
<tr>
<td></td>
<td>The second disabled field indicates the total number of those patient-provider assignments for which the treatment has been completed.</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>Clicking this button closes the Provider Assignment Preview window.</td>
</tr>
</tbody>
</table>
7.1 Provider Plan Details Window - Planned Tx Tab

Use this tab to view all planned procedures for this provider.
7.2 Provider Plan Details Window - General Tx Tab

Use this tab to display all general procedures for the selected provider.