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

• Follow document conventions.
• Familiarize yourself with the Scheduler module windows.
• Use the fields and options in various Scheduler 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>Bold</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>Italics</td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td>Monospace Fonts</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:

<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>
FIELD DEFINITIONS

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

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

All the screen names that appear in the Scheduler module are listed in alphabetical order. Screens that are accessible through the Scheduler 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 Academic Cancellation Window

You can access this window by going to the Scheduler window’s Chair tab, selecting a chair, and selecting the Academic Cancellation right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

This window works in conjunction with the Clinics window’s Charge for Cancelled Appt. drop-down field. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.

Use this to indicate instructor-approved cancellations on a chair reservation. For example, bad weather prevented most students from attending school that day.
**ACADEMIC CANCELLATION WINDOW**

**Reason**
This drop-down field indicates the reason for the academic cancellation.

The options in this drop-down field are defined in the *Missed Appointment Codes* window. For information on the *Missed Appointment Codes* window, refer to the axiUm Reference Manual for Maintenance and see *Missed Appointment Codes Window* on page 731.

**OK**
Clicking this button saves the selection and closes the *Academic Cancellation* window.

**Cancel**
Clicking this button cancels the selection and closes the *Academic Cancellation* window.

---

**2 Add Provider Non-Clinic Times Window**

You can access this window by going to the Scheduler window’s Active tab, highlighting an available time block, and selecting the Add Non-Clinic Time right-click option.

Use this window to define times that the selected provider is unavailable at the clinic.

**ADD PROVIDER NON-CLINIC TIMES WINDOW**

**OK**
Clicking this button saves the entries and closes the *Add Provider Non-Clinic Times* window.

**Cancel**
Clicking this button cancels any entries and closes the *Add Provider Non-Clinic Times* window.
2.1 Non-Clinic Time Section

Use this section to schedule the selected provider’s non-clinic time.

**ADD PROVIDER NON-CLINIC TIMES WINDOW - NON-CLINIC TIME SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>This disabled field indicates the name of the provider as displayed in the Scheduler window’s taskbar. For information on the Scheduler window, see <em>Scheduler Window</em> on page 121.</td>
</tr>
<tr>
<td>Description</td>
<td>This field is the full name of the non-clinic time reason.</td>
</tr>
<tr>
<td>Display Desc.</td>
<td>This field indicates the description of the non-clinic time.</td>
</tr>
<tr>
<td>Date</td>
<td>This field indicates the time-off date. If the time-off date is a recurring item, this field indicates the first day of the recurring week or month.</td>
</tr>
<tr>
<td>Color</td>
<td>This field indicates the color used to display the reason for the non-clinic time.</td>
</tr>
<tr>
<td>Partial Day</td>
<td>This checkbox, if selected, indicates this time-off day is a partial day.</td>
</tr>
<tr>
<td>Time Range</td>
<td>This field is enabled if the Partial Day checkbox is selected.</td>
</tr>
<tr>
<td>To</td>
<td>This field is enabled if the Partial Day checkbox is selected.</td>
</tr>
<tr>
<td>Is a recurring item</td>
<td>This checkbox, if selected, indicates this time-off day is a recurring item, starting on the date displayed in the Date field.</td>
</tr>
</tbody>
</table>

Clicking (ellipsis) opens the *Non-Clinic Time Reasons* window. For information on the *Non-Clinic Time Reasons* window, refer to the axiUm Reference Manual for Maintenance and see *Non-Clinic Time Reasons Window* on page 734.
2.2 Recurrence Pattern Section

The options in this section are enabled if the Is a recurring item option is selected in the Non-Clinic Times section. For information on the Non-Clinic Times section, see Non-Clinic Time Section on page 3.

Use this section to define recurrence schedules for the selected provider’s non-clinic time.
**ADD PROVIDER NON-CLINIC TIMES WINDOW - RECURRANCE PATTERN SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recur every ___ week(s) / month(s)</td>
<td>This field is enabled if the <em>Is a recurring item</em> option is selected. This field indicates the recurrence pattern of the cycle indicated using the <em>Weekly</em> option or <em>Monthly</em> option. If you selected the <em>Weekly</em> option, this field displays <em>Recur every ___ week(s)</em>. If this field displays an entry greater than 1, the <em>Starting on</em> field and the <em>Ending on</em> field is enabled. If you selected the <em>Monthly</em> option, this field displays <em>Recur every ___ month(s)</em>. If this field displays an entry greater than 1, the <em>Starting on</em> field and the <em>Ending on</em> field is enabled.</td>
</tr>
<tr>
<td>Starting on</td>
<td>This field is enabled if the <em>Is a recurring item</em> option is selected, and the <em>Recur every ___ week(s)</em> field or the <em>Recur every ___ month(s)</em> field displays an entry greater than 1. This field indicates the start date that this cycle begins. The date entered here is also automatically displayed in the <em>Ending on</em> date in the Recurrence pattern section as a disabled field.</td>
</tr>
<tr>
<td>Ending on</td>
<td>This field is enabled if the <em>Is a recurring item</em> option is selected, and the <em>Recur every ___ week(s)</em> field or the <em>Recur every ___ month(s)</em> field displays an entry greater than 1. By default, this field is the same date entered in the <em>Date</em> field. This field indicates the start date that this cycle ends.</td>
</tr>
</tbody>
</table>
| On the                 | This field is displayed if the *Monthly* option is selected. This field displays the recurring start week of the month, and displays the following options:  
  - *First*: The recurrence starts on the first week of the month.  
  - *Second*: The recurrence starts on the second week of the month.  
  - *Third*: The recurrence starts on the third week of the month.  
  - *Fourth*: The recurrence starts on the fourth week of the month.  
  - *Last*: The recurrence starts on the last week of the month. |
| Monday - Sunday        | This field is enabled if the *Is a recurring item* option is selected. These checkboxes, if selected, indicates the schedule applies to these days of the week, and displays the following checkboxes:  
  - *Monday*: The provider time-off schedule applies to Mondays.  
  - *Tuesday*: The provider time-off schedule applies to Tuesdays.  
  - *Wednesday*: The provider time-off schedule applies to Wednesdays.  
  - *Thursday*: The provider time-off schedule applies to Thursdays.  
  - *Friday*: The provider time-off schedule applies to Fridays.  
  - *Saturday*: The provider time-off schedule applies to Saturdays.  
  - *Sunday*: The provider time-off schedule applies to Sundays. |
**Add to Wait List Window**

You can access this window by:

- Going to the Scheduler window’s Availability tab, clicking the History tab, highlighting a record from the list view, and selecting the Add to Wait List right-click menu option. For information on the Scheduler window’s Availability tab, see *Scheduler Window - Availability Tab* on page 134.

- Going to the Appointment Lists window’s Appointments tab, highlighting an appointment (of type Active, Pending, or Planned), and selecting the Add to Wait List right-click option. For information on the Appointment Lists window’s Appointments tab, see *Appointment Lists Window - Appointments Tab* on page 31.

Use this window to place patient appointments on the wait list.

**ADD PROVIDER NON-CLINIC TIMES WINDOW - RECURRANCE PATTERN SECTION**

<table>
<thead>
<tr>
<th>Select All</th>
<th>This button is enabled if the <em>Is a recurring item</em> option is selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clicking this button selects all the days checkboxes (<em>Monday - Sunday</em>).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clear All</th>
<th>This button is enabled if the <em>Is a recurring item</em> option is selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clicking this button clears all the days checkboxes (<em>Monday - Sunday</em>).</td>
</tr>
</tbody>
</table>

**ADD TO WAIT LIST WINDOW**

<table>
<thead>
<tr>
<th>Patient</th>
<th>This disabled field displays the patient’s name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td>This drop-down field indicates the clinic for which the appointment in the wait list is waiting for an opening.</td>
</tr>
</tbody>
</table>

The options in this drop-down field are defined in the *Clinics* window. For information on the *Clinics* window, refer to the axiUm Reference Manual for Maintenance and see *Clinics Window* on page 693.
Additional Appointment Info Window

**ADD TO WAIT LIST WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason</td>
<td>This drop-down field indicates the reason for placing the patient on the waiting list. The options in this drop-down field are defined in the <em>Wait List Reasons</em> window. For information on the <em>Wait List Reasons</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Wait List Reasons Window</em> on page 816.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field is for internal purposes and indicates a numeric ranking of an appointment's importance that can be used to make cancellation decisions when chairs are limited. This field defaults to the value indicated in the <em>Default Priority field</em> of the <em>Wait List Reasons</em> window. For information on the <em>Wait List Reasons</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Wait List Reasons Window</em> on page 816.</td>
</tr>
<tr>
<td>Note</td>
<td>This text box indicates any free-form notes associated to this appointment in the wait list.</td>
</tr>
<tr>
<td>Availability</td>
<td>Clicking this button opens the <em>Patient Availability</em> window. For information on the <em>Patient Availability</em> window, see <em>Patient Availability Window</em> on page 103.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the entries and closes the <em>Add to Wait List</em> window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any entries and closes the <em>Add to Wait List</em> window.</td>
</tr>
</tbody>
</table>

**4 Additional Appointment Info Window**

You can access this window by going to the Appointment Expert window (in regular mode) and clicking the More Appts button. For information on the Appointment Expert window (regular mode), see *Appointment Expert Window (Regular Mode)* on page 12.

Use this window for additional search criteria when searching for appointments. For example, two patients want to arrive at the clinic together, and they require two different providers on the same date and time. You will use the Appointment Expert window (in regular mode) to enter search criteria for the first patient, and also use the Additional Appointment Info window to enter search criteria for the second patient. axiUm displays search results that satisfy both patients’ criteria.
ADDITIONAL APPOINTMENT INFO WINDOW

**Patient**
This field indicates the last name and first name of the patient for whom you are searching appointments.

Clicking (ellipsis) opens the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.

**Provider**
This field indicates the provider number of the provider for whom you are searching appointments.

Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.

**2nd Provider**
This field indicates the provider number of the second provider for whom you are searching appointments.

Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.
## ADDITIONAL APPOINTMENT INFO WINDOW

### Sched. 2nd For
This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment.

This drop-down field displays the following options:

- **Other Time**: If this provider is booked as a second provider, they will be defaulted to an assistant’s time.
- **Provider Time**: If this provider is booked as a second provider, they will be defaulted to a provider’s time.
- **Total Time**: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment.

### Group
This drop-down field indicates the provider group used in 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.

### Discipline
This drop-down field indicates the discipline used in the search criteria.

The options in this drop-down field are defined in the Discipline Codes window. For information on the Discipline Codes window, refer to the axiUm Reference Manual for Maintenance and see Discipline Codes Window on page 228.

Selecting an option from the drop-down field enables the Search for Specialist checkbox.

### Max Time Limit for all Appointments
This field indicates the maximum number of minutes required for the appointment time.

### Clinic Group
This drop-down field indicates the clinic group used in the search criteria.

The options in this drop-down field are defined in the Clinic Groups window. For information on the Clinic Groups window, refer to the axiUm Reference Manual for Maintenance and see Clinic Groups Window on page 682.

### Clinic
This drop-down field indicates the clinic used in the search criteria.

The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.

### Based on Appt Book
This checkbox, if selected, indicates to use the appointment book that is currently selected in the scheduler window.

### Chair
This drop-down field indicates the chair used in the search criteria.

The options in this drop-down field are defined in the Chairs window. For information on the Chairs window, refer to the axiUm Reference Manual for Maintenance and see Chairs Window on page 679.
**ADDITIONAL APPOINTMENT INFO WINDOW**

**Instructor**
This field indicates the last name and first name of the instructor used in the search criteria. During the search process, axiUm considers the selected instructor’s availability based on their schedule defined in the *Instructor Working Schedules* window. For information on the *Instructor Working Schedules* window, refer to the axiUm Reference Manual for Maintenance and see *Instructor Working Schedules Window* on page 710.

Clicking (ellipsis) opens the *Users List* window to select from. For information on the *Users List* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Users List Window* on page 166.

**Search for Specialist**
This checkbox is enabled if the *Discipline* drop-down field displays a selection. This checkbox, if selected, indicates to search for appointment times based on a specialist for the discipline displayed in the *Discipline* drop-down field.

**Code**
This drop-down field indicates to search for appointment times based on an appointment code.

The options in this drop-down field are defined in the *Appointment Code* window. For information on the *Appointment Code* window, refer to the axiUm Reference Manual for Maintenance and see *Appointment Code Window* on page 649.

**Length**
This field indicates the length of the appointment, in minutes, for the appointment code selected in the *Code* drop-down field.

The number of minutes for each appointment code is defined in the *Appointment Code* window. For information on the *Appointment Code* window, refer to the axiUm Reference Manual for Maintenance and see *Appointment Code Window* on page 649.

**Clear Data**
Clicking this icon clears the user-entry fields. By clearing the fields, axiUm allows you to enter a new record.

**Add a new Record**
Clicking this icon adds the new additional appointment information you entered, and displays it in the list view.

**Modify Record**
Clicking this icon saves any modifications you made to the item selected from the list view.

**Delete Record**
Clicking this icon permanently deletes the item selected from the list view.
5 Appointment Additional Providers Window

You can access this window by:

- Going to the New Planned Appointment window and clicking the Add’l Providers button. For information on the New Planned Appointment window, see *New Planned Appointment Window* on page 95.
- Going to the Edit Planned Appointment window and clicking the Add’l Providers button. For information on the Edit Planned Appointment window, see *Edit Planned Appointment Window* on page 69.
- Going to the New Appointment window and clicking the Add’l Providers button. For information on the New Appointment window, see *New Appointment Window* on page 88.
- Going to the Edit Appointment window and clicking the Add’l Providers button. For information on the Edit Appointment window, see *Edit Appointment Window* on page 59.

Use this window to search for and select additional providers (meaning in addition to the main appointment provider and the second appointment provider), to a patient’s planned appointment.

**APPOINTMENT ADDITIONAL PROVIDERS WINDOW**

**Criteria**  
In this field, enter the first character(s) of the search criteria. Entering an underscore ( _ ) displays all results within the selected search option.

**Provider Group**  
This drop-down field indicates the provider group used in 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.
APPOINTMENT ADDITIONAL PROVIDERS WINDOW

Provider Type
This drop-down field indicates the provider type used in the search criteria.

The options available in this drop-down field are defined in the Provider Type Codes window. For information on the Provider Type Codes window, refer to the axiUm Reference Manual for Maintenance and see Provider Type Codes Window on page 453.

Appt. Provider
This disabled field indicates the main appointment provider, as entered in the Provider field of the New Planned Appointment window or the Edit Planned Appointment window.

For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.

For information on the Edit Planned Appointment window, see Edit Appointment Window on page 59.

Appt. 2nd Provider
This disabled field indicates the second appointment provider, as entered in the Provider field of the New Planned Appointment window or the Edit Planned Appointment window.

For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.

For information on the Edit Planned Appointment window, see Edit Appointment Window on page 59.

Selected Providers
This list view displays the additional providers (meaning in addition to the main appointment provider and the second appointment provider) selected for this planned appointment.

Clicking → (right arrow) moves the highlighted items from the left list view to the Selected Providers list view.

Clicking ← (left arrow) moves the highlighted items from the Selected Providers list view to the left list view.

OK
Clicking this button saves the selection and closes the Appointment Additional Providers window.

Cancel
Clicking this button cancels any selection and closes the Appointment Additional Providers window.

6 Appointment Expert Window (Regular Mode)

You can access this window by:

- Going to the Scheduler window and clicking ⦵ (Expert).
- Going to the Scheduler window’s Active tab, selecting a hovering appointment block, and selecting the right-click Appointment Expert option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.
• Going to the Appointment Lists window’s Appointments tab, highlighting an appointment (of type Requested or Planned) and selecting the Schedule With Expert right-click option. For information on the Appointment Lists window’s Appointments tab, see *Appointment Lists Window - Appointments Tab* on page 31.

Use this window to automatically find available times to schedule the patient, rather than having to manually search for an appropriate time block.

**APPOINTMENT EXPERT WINDOW (REGULAR MODE)**

<table>
<thead>
<tr>
<th>Search on Reserved Chairs</th>
<th>This option, if selected, indicates to search for chairs that have reservations.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Selecting this option enables the <em>More Appts</em> button.</td>
</tr>
</tbody>
</table>

Search on Available Chairs

This option, if selected, indicates to search for available (unreserved) chairs.
**APPOINTMENT EXPERT WINDOW (REGULAR MODE)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This field indicates the last name and first name of the patient for whom you are searching appointments. Clicking ... (ellipsis) opens the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112. Entering this field enables the Info button.</td>
</tr>
<tr>
<td>Info</td>
<td>This button is enabled if the Patient field displays a patient name. Clicking this button opens the Patient Contact Information window. For information on the Patient Contact Information window, see Patient Contact Information Window on page 104.</td>
</tr>
<tr>
<td>Provider</td>
<td>This field indicates the provider number of the provider for whom you are searching appointments. Clicking ... (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td>2nd Provider</td>
<td>This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this appointment. Clicking ... (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
</tbody>
</table>
| Sched. 2nd For| This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment. This drop-down field displays the following options:  
  - **Other Time**: If this provider is booked as a second provider, they will be defaulted to an assistant’s time.  
  - **Provider Time**: If this provider is booked as a second provider, they will be defaulted to a provider’s time.  
  - **Total Time**: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment. |
| Group         | This drop-down field indicates the provider group used in 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. |
**APPPOINTMENT EXPERT WINDOW (REGULAR MODE)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discipline</td>
<td>This drop-down field indicates the discipline used in the search criteria.</td>
<td>The options are defined in the <em>Discipline Codes</em> window. For information, refer to the axiUm Reference Manual for Maintenance and see <em>Discipline Codes Window</em> on page 228. Selecting an option enables the <em>Search for Specialist</em> checkbox.</td>
</tr>
<tr>
<td>Only List Matching Disciplines</td>
<td>This checkbox, if selected, omits reserves that have no associated discipline, and offers only those available time blocks that match the discipline indicated in the Discipline drop-down field.</td>
<td></td>
</tr>
<tr>
<td>Clinic Group</td>
<td>This drop-down field indicates the clinic group used in the search criteria.</td>
<td>The options are defined in the <em>Clinic Groups</em> window. For information, refer to the axiUm Reference Manual for Maintenance and see <em>Clinic Groups Window</em> on page 682.</td>
</tr>
<tr>
<td>Clinic</td>
<td>This drop-down field indicates the clinic used in the search criteria.</td>
<td>The options are defined in the <em>Clinics</em> window. For information, refer to the axiUm Reference Manual for Maintenance and see <em>Clinics Window</em> on page 693.</td>
</tr>
<tr>
<td>Chair</td>
<td>This drop-down field indicates the chair used in the search criteria.</td>
<td>The options are defined in the <em>Chairs</em> window. For information, refer to the axiUm Reference Manual for Maintenance and see <em>Chairs Window</em> on page 679.</td>
</tr>
<tr>
<td>Instructor</td>
<td>This field indicates the last name and first name of the instructor.</td>
<td>During the search process, axiUm considers the selected instructor’s availability based on their schedule defined in the <em>Instructor Working Schedules</em> window. For information, refer to the axiUm Reference Manual for Maintenance and see <em>Instructor Working Schedules Window</em> on page 710. Clicking (ellipsis) opens the <em>Users List</em> window to select from. For information, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Users List Window</em> on page 166.</td>
</tr>
<tr>
<td>Search for Specialist</td>
<td>This checkbox is enabled if the Discipline drop-down field displays a selection.</td>
<td>This checkbox, if selected, indicates to search for appointment times based on a specialist for the discipline displayed in the Discipline drop-down field.</td>
</tr>
<tr>
<td>Based on Appt Book</td>
<td>This checkbox, if selected, indicates to search for appointment times based on the appointment book’s settings.</td>
<td>If the <em>Search on Available Chairs</em> option is selected, selecting this checkbox also displays the <em>Use Clinic's Sessions</em> option and the <em>Use Book's Open Hours</em> option.</td>
</tr>
<tr>
<td>Use Clinic's Sessions</td>
<td>This option is enabled if the <em>Based on Appt Book</em> checkbox is selected.</td>
<td>Selecting this option searches for appointment times based on the selected clinic's sessions.</td>
</tr>
</tbody>
</table>
**APPOINTMENT EXPERT WINDOW (REGULAR MODE)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use Book's Open Hours</strong></td>
<td>This option is enabled if the Based on Appt Book checkbox is selected. Selecting this option searches for appointment times based on the selected book's open hours.</td>
</tr>
<tr>
<td><strong>Not Before</strong></td>
<td>This field indicates that axiUm will search for appointments no earlier than the date displayed in this field.</td>
</tr>
<tr>
<td><strong>Code</strong></td>
<td>This drop-down field indicates to search for appointment times based on an appointment code. The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.</td>
</tr>
<tr>
<td><strong>Length</strong></td>
<td>This is the length of the appointment, in minutes, for the appointment code selected in the Code drop-down field. The number of minutes for each appointment code is defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.</td>
</tr>
<tr>
<td><strong>Weekday</strong></td>
<td>This section indicates to search for appointment times for the days of the week indicated. This section displays the following checkboxes: M, T, W, Th, F, Sa, and Su.</td>
</tr>
<tr>
<td><strong>Date Range</strong></td>
<td>This section indicates to search for appointment times based on the date range indicated in the From field and To field of this section. If you are accessing this window by clicking the Sch. w/Expert button on the Patient Appointments window or the Family Appointments window, to schedule an appointment of type Planned, and the Not Before Date in the associated New Planned Appointment window or the Edit Planned Appointment window displays a date, the From field in this section displays the same date. For information on the Patient Appointments window, see Patient Appointments Window on page 100. For information on the Family Appointments window, see Family Appointments Window on page 79. For information on the New Planned Appointment window, see New Planned Appointment Window on page 95. For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69.</td>
</tr>
<tr>
<td><strong>Time Range</strong></td>
<td>This section indicates to search for appointment times based on the time range indicated in the From field and To field of this section.</td>
</tr>
<tr>
<td><strong>Close</strong></td>
<td>Clicking this button closes the Appointment Expert window.</td>
</tr>
<tr>
<td><strong>More Appts...</strong></td>
<td>This button is enabled if the Search on Reserved Chairs option is selected. Clicking this button opens the Additional Appointment Info window. For information on the Additional Appointment Info window, see Additional Appointment Info Window on page 7.</td>
</tr>
</tbody>
</table>
**Appointment Expert Window (Regular Mode)**

<table>
<thead>
<tr>
<th>Options</th>
<th>Clicking this button opens the Appointment Expert Options window. For information on the Appointment Expert Options window, see Appointment Expert Options Window on page 19.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make Appts...</td>
<td>Clicking this button makes an appointment using the highlighted item from the list view. This is equivalent to the Make Appointments right-click option.</td>
</tr>
<tr>
<td>Search</td>
<td>Clicking this button starts the search process.</td>
</tr>
<tr>
<td>Add to Wait List</td>
<td>This button is enabled if you are accessing the Appointment Expert window by:</td>
</tr>
<tr>
<td></td>
<td>• Selecting the Schedule With Expert right-click option from the Appointment Lists window's Appointments tab. For information on the Appointment Lists window's Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.</td>
</tr>
<tr>
<td></td>
<td>• Selecting the right-click Appointment Expert option from the Scheduler window's Active tab's hovering appointment block. For information on the Scheduler window's Active tab, see Scheduler Window - Active Tab on page 128.</td>
</tr>
<tr>
<td></td>
<td>Clicking this button opens the Add to Wait List window. For information on the Add to Wait List window, see Add to Wait List Window on page 6.</td>
</tr>
<tr>
<td>Preview...</td>
<td>Clicking this button changes the Appointment Expert window from regular mode to preview mode. For information on the Appointment Expert window (preview mode), see Appointment Expert Window (Preview Mode) on page 18.</td>
</tr>
<tr>
<td>Load More</td>
<td>Clicking this button displays the next set of search results. The number of search results axiUm displays at a time is based on the Number of search results field in the Appointment Expert Options window's Search section. For information on the Appointment Expert Options window's Search section, see Search Section on page 22.</td>
</tr>
<tr>
<td>Results</td>
<td>This tab's list view displays the search results. Selecting the checkbox next to the item in the list view indicates that the appointment is not good, and axiUm grays the item.</td>
</tr>
<tr>
<td>Make Appointment</td>
<td>This right-click option makes an appointment using the highlighted item from the list view. This is equivalent to clicking the Make App button.</td>
</tr>
<tr>
<td>View Appt Details</td>
<td>This right-click option is enabled if there are additional search criteria added to the Appointment Expert window. These additional search criteria are entered in the Additional Appointment window. For information on the Additional Appointment window, see Additional Appointment Info Window on page 7.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Appointment Reserve Info window. For information on the Appointment Reserve Info window, see Appointment Reserve Info Window on page 48.</td>
</tr>
</tbody>
</table>
7 Appointment Expert Window (Preview Mode)

You can access this window by going to the Appointment Expert window (in regular mode) and clicking the Preview button. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.

Use this window to preview the provider or chair associated to the highlighted item in the list view. To preview the time block selected in this window, axiUm highlights the associated time block in the Scheduler module’s Active tab. If the list view contains appointment time slots across different clinics, highlighting items from this window displays the associated clinic layout.

**Appointment Expert Window (Preview Mode)**

- **(up arrow)** Use this icon to move the gray highlighted item up the list.

- **(down arrow)** Use this icon to move the gray highlighted item down the list.

- **Load More** Clicking this button displays the next set of search results.
  
  The number of search results axiUm displays at a time is based on the Number of search results field in the Appointment Expert Options window's Search section. For information on the Appointment Expert Options window's Search section, see Search Section on page 22.

- **Make Appts** Clicking this button makes an appointment using the highlighted item from the list view.
  
  This is equivalent to the Make Appointments right-click option.

- **Expert** Clicking this button returns you to the Appointment Expert window in regular mode. For information on the Appointment Expert window in regular mode, see Appointment Expert Window (Regular Mode) on page 12.

- **Make Appointment** This right-click option makes an appointment using the highlighted item from the list view.
  
  This is equivalent to clicking the Make Appt button.
8 Appointment Expert Options Window

You can access this window by going to the Appointment Expert window (in regular mode) and clicking the Options button. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.

Use this window to define the default search criteria and booking behavior for axiUm to use when running a search in the Appointment Expert window (in regular mode).

**APPOINTMENT EXPERT OPTIONS WINDOW**

**Accept**  
Clicking this button saves the entries and closes the Appointment Expert Options window.

**Cancel**  
Clicking this button cancels any entries and closes the Appointment Expert Options window.
8.1 Date Range Section

Use this section to define the default date range used when running a search in the Appointment Expert window (in regular mode).

<table>
<thead>
<tr>
<th>Date Range</th>
<th>This field indicates the default number of days into the future that a search is to begin.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start From</td>
<td>__ days in the future</td>
</tr>
<tr>
<td>Search To</td>
<td>__ days in the future</td>
</tr>
</tbody>
</table>

8.2 Include Overlaps Section

Use this section to select the default handling of appointment blocks when searching in the Appointment Expert window (in regular mode).

<table>
<thead>
<tr>
<th>Include Overlaps</th>
<th>This option, if selected, indicates to include overlaps in appointment times during the search process.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Based on Provider’s Double Book Warning Flag</td>
<td></td>
</tr>
</tbody>
</table>
8.3 Discipline Search based on Section

Use this section to select the behavior of discipline-based searches in the Appointment Expert window (in regular mode).

You can search based on discipline if the Search on Reserved Chairs option is selected in the Appointment Expert window (in regular mode). For information on the Appointment Expert window, see Appointment Expert Window (Regular Mode) on page 12.

**APPOINTMENT EXPERT OPTIONS WINDOW - DISCIPLINE SEARCH BASED ON SECTION**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>This option, if selected, indicates to exclude overlaps in appointment times during the search process.</td>
</tr>
<tr>
<td>Based on Provider’s ‘Double Book Warning’ Flag</td>
<td>This option, if selected, indicates to use the provider’s double-booking settings, as indicated in the Double Book Warning drop-down field in the Users window’s Provider tab’s Scheduler section. For information on the Provider tab’s Scheduler section, refer to the axiUm Reference Manual for Maintenance and see Scheduling Section on page 480. Selecting this checkbox lets you double-book the dentist’s time in a manner that does not overwhelm them. This option is also used in conjunction with the one-chair day and multi-chair day rules in the Scheduling Rules window. For information on the Scheduling Rules window, refer to the axiUm Reference Manual for Maintenance and see Scheduling Rules Window on page 811.</td>
</tr>
</tbody>
</table>

**APPOINTMENT EXPERT OPTIONS WINDOW - INCLUDE OVERLAPS SECTION**

- Discipline Search based on:
  - Session or Daily Layout setup
  - Provider Schedule Ideal Day Preferences

- Used only when Search on Reserved Chairs is on.
8.4 Instructor Search based on Section

Use this section to select the behavior of instructor-based searches in the Appointment Expert window (in regular mode).

If the Search on Available Chairs option and the Use Book’s Open Hours option is selected, axiUm cannot run instructor-based searches.

APPOINTMENT EXPERT OPTIONS WINDOW - INSTRUCTOR SEARCH BASED ON SECTION

<table>
<thead>
<tr>
<th>Instructor Search based on:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Session or Daily Layout setup</td>
<td>Use the instructors stamped on the chair layout for the search.</td>
</tr>
<tr>
<td>Instructor Work Schedule setup</td>
<td>Use the instructor working schedule for the search.</td>
</tr>
</tbody>
</table>

8.5 Search Section

Use this section to define the search result display when running a search in the Appointment Expert window (in regular mode).
**Appointment Expert Options Window - Search Section**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of search results</td>
<td>This field indicates the number of search results to display in one set. For example, if you enter 10 and there are 57 items to display in the Appointment Expert window (regular mode), clicking the Search button displays the first 10 items, then the Load More button will display the next 10, 10, 10, and then 7 (for a total of 57).</td>
</tr>
<tr>
<td>Suggest multiple available times per open block</td>
<td>This checkbox, if selected, indicates that the Appointment Expert window (regular mode) will suggest first and last available times per open block. This is used to ensure that new appointments do not create unusable blocks of time. If you select this checkbox -- and the day is wide open, and patient does not specify a time -- axiUm offers both the first opening from the start of a reservation and last opening from the end of the reservation. If appointments exist, axiUm offers the first available time after the booked appointment, plus the last opening from the end of the reservation. If you deselect this checkbox -- and the day is wide open, and patient does not specify a time -- axiUm offers the first opening from the start of a reservation, and no last openings from the end of the reservation.</td>
</tr>
<tr>
<td>Allow duplicate search results</td>
<td>This checkbox, if selected, indicates that axiUm searches for the same provider, same time, but in different chairs (if they have multiple reserved chairs). This checkbox, if deselected, indicates that axiUm searches for the same provider, same time, but for only one instance across multiple chairs (if they have multiple reserved chairs).</td>
</tr>
<tr>
<td>Minimum minutes between times offered</td>
<td>This field indicates the minimum gap time (in minutes) allowed between appointments within a search. This fields prevents booking appointments too close together, giving providers buffer time between appointments (e.g. walking to a different building). For example, if you enter 15, and axiUm finds two available time blocks within 10 minutes of each other, it discards one of those search results.</td>
</tr>
</tbody>
</table>

### 8.6 Appointments Section

This section is used in conjunction with the Search on Reserved Chairs option of the Appointment Expert window (in regular mode). For information on the Appointment Expert window (regular mode), see *Appointment Expert Window (Regular Mode)* on page 12.

Use this section to select the booking behavior of the Appointment Expert window (in both regular mode and preview mode).
8.7 Upon Preview or Make Appts Section

This section is used in conjunction with the Search on Reserved Chairs option of the Appointment Expert window (in regular mode). For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.

Use this section to select the behavior of the Scheduler window’s Active tab after booking the appointment.
9 Appointment History Window

You can access this window by:

- Going to the Patient Appointments window, highlighting a record from the list view, and clicking the History button. For information on the Patient Appointments window, see Patient Appointments Window on page 100.

- Going to the Family Appointments window, highlighting a record from the list view, and clicking the History button. For information on the Family Appointments window, see Family Appointments Window on page 79.

- Going to the Appointment Lists window’s Appointments tab, highlighting a record from the list view, and selecting the Show History right-click option. For information on the Appointment Lists window’s Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.

- Going to the Scheduler window’s Availability tab, clicking one of three sub-tabs, highlighting a record from the list view, and selecting the Show History right-click menu option. For information on the Scheduler window’s Availability tab, see Scheduler Window - Availability Tab on page 134.

- Going to the Scheduler window’s Pending tab, highlighting a record from the list view, and selecting the Show History right-click option. For information on the Scheduler window’s Pending tab, see Scheduler Window - Pending Tab on page 138.

A historic list of records is available in the list view. Selecting an item from the list view displays the details in the window’s fields. Because this is a historic record, all fields in this window are read-only.
**APPOINTMENT HISTORY WINDOW**

**Patient Name**
This static field indicates the patient's name.

**Date**
This static field indicates the date of the appointment.
This static field is blank if you are viewing the history of a planned appointment.

**Time**
This static field indicates the time of the appointment.
This static field is blank if you are viewing the history of a planned appointment.

**Not Before**
This static field indicates that this appointment was requested for a date no earlier than the date displayed in this field.

**Chair**
This static field indicates the chair with which this appointment was booked.

**Made on**
This static field indicates the date on which this appointment was booked.

**Estimate**
This disabled field is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

**Provider**
This disabled field indicates the provider with whom this appointment was booked.

**2nd Provider**
This disabled drop-down field indicates the second provider with whom this appointment was booked.
APPOINTMENT HISTORY WINDOW

**Sched. 2nd For**  
This disabled field is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled drop-down field indicates the default option used for the provider displayed in the 2nd Provider field if they were are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time was used (how their time was treated) if this provider was the secondary provider for an appointment.

**Appt. Code**  
This disabled field indicates the appointment code used for the appointment.

**Tx Discipline**  
This disabled field indicates the discipline associated to the appointment.

**Appt. Status**  
This disabled field indicates the status of the appointment.

**Rank**  
This disabled field is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled field indicates a numeric ranking of an appointment’s importance that can be used to make cancellation decisions when chairs are limited.

**Clinic**  
This disabled field indicates the clinic under which this appointment was booked.

**Instructor**  
This disabled field indicates the instructor booked with this appointment.

**Session**  
This disabled field indicates the clinic session which this appointment was booked.

**Added using Expert**  
This static field is shown if all the following conditions are met:

- Your institution uses a self-booking telephone system.
- The patient had self-booked an appointment through the Appointment Expert window by using the self-booking telephone system.

**Recall**  
This disabled checkbox is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled checkbox, if selected, indicates that this appointment is a recall appointment.

**Sooner if possible**  
This disabled field is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This checkbox, if selected, indicates that the patient wants to come in sooner than scheduled, if there is an earlier opening due to a cancellation.
**APPOINTMENT HISTORY WINDOW**

**Short Notice**
This disabled checkbox is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This checkbox, if selected, indicates that the patient can be bumped up if there's an earlier opening, due to cancellation; not necessarily because the patient asked for it but because the institution allows it for the selected appointment.

**Confirmed**
This disabled checkbox is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled checkbox, if selected, indicates that this appointment has been confirmed with the patient.

**Reason/Note**
This disabled text box indicates any notes about this appointment.

**Reason**
This disabled text box is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled text box indicates any notes about this appointment.

**Provider Time (Minutes)**
This disabled field is displayed if the Advanced option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This section indicates the appointment duration, broken down by a maximum of three provider times and three assistant times.

**Close**
Clicking this button closes the Appointment History window.

**Wait History...**
This button is enabled if you are accessing this window from the Appointment Lists window's Wait List tab's Show History right-click option. For information on the Appointment Lists window's Wait List tab, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

### 10 Appointment Lists Window

You can access this window by going to the Scheduler window and clicking (Lists). For information on the Scheduler window, see Scheduler Window on page 121.

Use this window to access the various types of appointment records for the selected patient.
APPOINTMENT LISTS WINDOW

**Group**
This drop-down field indicates the user group used in the search criteria. The options displayed 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.

**Provider**
This field indicates the provider number of the provider in the search criteria.

Clicking \(\ldots\) (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.

Entering a provider in this field enables the For Patients assigned to Provider checkbox.

**Patient**
This field is available if the Appointments tab or the Recalls tab is selected.

This field indicates the last name and first name of the patient in the search criteria.

Clicking \(\ldots\) (ellipsis) opens the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.

**For Patients assigned to Provider**
This checkbox is available if the Appointments tab or the Recalls tab is selected.

This checkbox, if selected, indicates to search for appointments where the patients are assigned to a provider.
**APPOINTMENT LISTS WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td>This drop-down field indicates the clinic used in the search criteria. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693. This drop-down field is disabled in the Wait List tab’s Appointment Fill mode. For information on the Wait List tab’s Appointment Fill mode, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.</td>
</tr>
<tr>
<td>Type</td>
<td>This drop-down field indicates the appointment type used in the search criteria. This drop-down field displays the following options: ALL, Active, Checked In, Checked Out, Pending, Rescheduled, Failed, Cancelled, Requested, Ortho, Planned. These options are hard-coded and are not user-defined.</td>
</tr>
<tr>
<td>Code</td>
<td>This drop-down field is available if the Appointments tab or the Recalls tab is selected. This drop-down field indicates the appointment code used in the search criteria. Clicking ‹...› (ellipses) opens the Appointment Code window to select from. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.</td>
</tr>
<tr>
<td>Reason</td>
<td>This drop-down field is available if the Wait List tab is selected. This drop-down field indicates the wait reason used in the search criteria. The options in this drop-down field are defined in the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 816.</td>
</tr>
<tr>
<td>Status</td>
<td>This drop-down field is available if the Appointments tab or the Recalls tab is selected. This drop-down field indicates the appointment status used in the search criteria. 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.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field is available if the Wait List tab is selected. This field is for internal purposes and indicates a numeric ranking of an appointment’s importance that can be used to make cancellation decisions when chairs are limited. This field defaults to the value indicated in the Default Priority field of the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 816.</td>
</tr>
<tr>
<td>Date From</td>
<td>This field is available if the Appointments tab or the Recalls tab is selected. This field indicates to search for appointments no earlier than this date.</td>
</tr>
<tr>
<td>Date To</td>
<td>This field is available if the Appointments tab or the Recalls tab is selected. This field indicates to search for appointments no later than this date.</td>
</tr>
</tbody>
</table>
10.1 Appointment Lists Window - Appointments Tab

You can access this window by going to the Appointment Lists window and clicking the Appointments tab. For information on the Appointment Lists window, see Appointment Lists Window on page 28.

This tab is disabled in the Wait List tab’s Appointment Fill mode. For information on the Wait List tab’s Appointment Fill mode, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

Use this tab to search for and view a list of appointment records.
APPOINTMENT LISTS WINDOW - APPOINTMENTS TAB

Select Patient
This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar.

Show History
This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25.

Patient Card
This right-click option displays the Patient Card window with information about the currently selected patient.

For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

Patient Approvals
This right-click option opens the Patient Approvals window. For information on the Patient Approvals window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Approvals Window on page 53.

Patient Check In
This right-click option is enabled if the highlighted item in the list view is an appointment of type Active and the patient has an appointment booked for today but has not yet checked in.

This right-click option checks in the patient associated to the highlighted item. It also changes the appointment from type Checked In to type Chk In (Seated).

Undo Patient Check In
This right-click option is enabled if the patient associated to the highlighted item has checked in.

If the Patient Check In right-click option was selected in error, this right-click option will reverse the action.

Patient Check Out
This right-click option is enabled if the patient associated to the highlighted item has an appointment of type Checked In or type Chk In (Seated).

This right-click option indicates that the patient has been checked out of the clinic. It also changes the appointment to type Checked Out. Checked in patients are indicated on the appointment block in gray text.
### APPOINTMENT LISTS WINDOW - APPOINTMENTS TAB

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient Check In Form</strong></td>
<td>This right-click option is enabled if the patient associated to the highlighted item has checked in. This right-click option opens the <em>Patient Check In Form</em>.</td>
</tr>
<tr>
<td><strong>Patient Seated</strong></td>
<td>This right-click option is enabled if the patient associated to the highlighted item has checked in. This right-click option sets the appointment status to patient seated. This is visually indicated in the <em>Active</em> tab by black text in the appointment box. This option is only available if the patient is already checked in.</td>
</tr>
<tr>
<td><strong>Undo Patient Seated</strong></td>
<td>This right-click option is enabled if the <em>Patient Seated</em> right-click option was selected. If the <em>Patient Seated</em> right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td><strong>Chart Request</strong></td>
<td>This right-click option opens the <em>Request Chart-Out</em> window. For information on the <em>Request Chart-Out</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <a href="#">Request Chart-Out Window</a> on page 143.</td>
</tr>
<tr>
<td><strong>Patient Recalls</strong></td>
<td>This right-click option opens the <em>Patient Recalls</em> window. For information on the <em>Patient Recalls</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <a href="#">Patient Recalls Window</a> on page 120.</td>
</tr>
<tr>
<td><strong>Appointment Treatments</strong></td>
<td>This right-click option opens the <em>Appointment Treatments</em> window. For information on the <em>Appointment Treatments</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <a href="#">Appointment Treatments Window</a> on page 8.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>This right-click option opens the <em>Appointment Notes</em> window. For information on the <em>Appointment Notes</em> window, see <a href="#">Appointment Notes Window</a> on page 40.</td>
</tr>
<tr>
<td><strong>Add to Wait List</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type <em>Planned</em> or <em>Active</em>. This right-click option opens the <em>Add to Wait List</em> window. For information on the <em>Add to Wait List</em> window, see <a href="#">Add to Wait List Window</a> on page 6.</td>
</tr>
<tr>
<td><strong>Change to Request</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type <em>Planned</em>. This right-click option changes the highlighted item to appointment type <em>Requested</em>.</td>
</tr>
</tbody>
</table>

---

[Request Chart-Out Window](#): This window is used for creating and managing patient chart-out requests. It allows users to request patient charts for various reasons, ensuring that patient information is available and up-to-date when needed.

[Patient Recalls Window](#): This window is used for scheduling appointments for patient recalls. It helps in reminding patients for upcoming visits and ensures that appointments are efficiently managed.

[Appointment Treatments Window](#): This window is used for scheduling and managing appointment treatments. It allows users to add, edit, or delete treatments associated with an appointment, ensuring that patients receive the appropriate medical care.

[Appointment Notes Window](#): This window is used for recording and managing appointment notes. It allows users to document any specific instructions or comments related to an appointment, ensuring that important information is captured and easily accessible.

[Add to Wait List Window](#): This window is used for managing patient appointments on the wait list. It allows users to add appointments to the wait list, ensuring that patients are contacted in the correct order for their scheduled visits.
**APPOINTMENT LISTS WINDOW - APPOINTMENTS TAB**

<table>
<thead>
<tr>
<th><strong>Schedule</strong></th>
<th>This right-click option is enabled if the highlighted item is an appointment of type Planned or Requested.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clicking this button does one of the following:</td>
</tr>
<tr>
<td></td>
<td>• If the 'Make Appt' button will schedule automatically at time selected checkbox is selected in</td>
</tr>
<tr>
<td></td>
<td>the Appointment Expert Options window's Appointments section, axiUm books the appointment.</td>
</tr>
<tr>
<td></td>
<td>• If the 'Make Appt' button will schedule automatically at time selected checkbox is selected in</td>
</tr>
<tr>
<td></td>
<td>the Appointment Expert Options window's Appointments section, axiUm changes the highlighted</td>
</tr>
<tr>
<td></td>
<td>item in the list view to a hovering appointment block.</td>
</tr>
<tr>
<td></td>
<td>For information on the Appointment Expert Options window's Appointments section, see</td>
</tr>
<tr>
<td></td>
<td>Appointments Section on page 23.</td>
</tr>
<tr>
<td><strong>Reschedule</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active,</td>
</tr>
<tr>
<td></td>
<td>Checked In, Checked Out, Failed, or Cancelled.</td>
</tr>
<tr>
<td></td>
<td>This right-click option changes the highlighted item to a hovering appointment block. It</td>
</tr>
<tr>
<td></td>
<td>also changes the appointment type to Rescheduled.</td>
</tr>
<tr>
<td><strong>Schedule With</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Planned</td>
</tr>
<tr>
<td><strong>Expert</strong></td>
<td>or Requested.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Appointment Expert window (in regular mode). For information</td>
</tr>
<tr>
<td></td>
<td>on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode)</td>
</tr>
<tr>
<td></td>
<td>on page 12.</td>
</tr>
<tr>
<td></td>
<td>Once the appointment is scheduled, axiUm changes the highlighted item to appointment type Active.</td>
</tr>
<tr>
<td><strong>Confirm</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active.</td>
</tr>
<tr>
<td></td>
<td>This right-click option confirms the selected appointment.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active,</td>
</tr>
<tr>
<td></td>
<td>Checked In, Checked Out, Rescheduled, Requested, or Planned.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Edit Appointment window or the Edit Planned Appointment window.</td>
</tr>
<tr>
<td></td>
<td>For information on the Edit Appointment window, see Edit Appointment Window on page 59. For</td>
</tr>
<tr>
<td></td>
<td>information on the Edit Planned Appointment window, see Edit Planned Appointment Window on</td>
</tr>
<tr>
<td></td>
<td>page 69.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active,</td>
</tr>
<tr>
<td></td>
<td>Checked In, Checked Out, or Rescheduled.</td>
</tr>
<tr>
<td></td>
<td>This right-click option cancels the selected appointment. A cancelled appointment is one</td>
</tr>
<tr>
<td></td>
<td>that either the patient or the provider does not want to attend at this time.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Cancellation window. For information on the</td>
</tr>
<tr>
<td></td>
<td>Cancellation window, see Cancellation Window on page 54.</td>
</tr>
</tbody>
</table>
**APPOINTMENT LISTS WINDOW - APPOINTMENTS TAB**

<table>
<thead>
<tr>
<th>Right-Click Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Fail**           | This right-click option is enabled if the highlighted item is an appointment of type *Active*, *Checked In*, or *Checked Out*.  
This right-click option indicates that either the patient or the provider failed to arrive at their appointment.  
A failed appointment is one that either the patient did not cancel and did not show up. |
| **Undo Cancel/Fail** | This right-click option is enabled if the highlighted item is an appointment of type *Cancelled* or *Failed*.  
If the *Cancel* right-click option or the *Fail* right-click option was selected in error, this right-click option will reverse the action. |
| **Delete**         | This right-click option is enabled if the highlighted item is an appointment of type *Active*, *Checked In*, *Checked Out*, *Rescheduled*, *Requested*, or *Planned*.  
This right-click option removes the highlighted item from the Availability tab’s *Active* tab.  
It also removes the appointment time block from the Scheduler window's *Active* tab. |
| **Edit X-Ray Info** | This right-click option is enabled if the selected appointment is for a hygiene-type appointment code.  
If the appointment is for today or in the future, this right-click option opens the *X-Ray Information* window.  
If the appointment was in the past and the *X-Rays Taken* checkbox was deselected in the *X-Ray Information* window, you cannot open that *X-Ray Information* window.  
For information on the *X-Ray Information* window, see *X-Ray Information Window* on page 152. |
| **Print Appt Form** | This right-click option is enabled if the highlighted item is an appointment of type *Active*, *Checked In*, or *Checked Out*.  
This right-click option opens the *Print Appointment Options* window. For information on the *Print Appointment Options* window, see *Print Appointment Options Window* on page 107. |

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**10.2 Appointment Lists Window - Recalls Tab**

You can access this window by going to the Appointment Lists window and clicking the Recalls tab. For information on the Appointment Lists window, see *Appointment Lists Window* on page 28.

This tab is disabled in the Wait List tab’s Appointment Fill mode. For information on the Wait List tab’s Appointment Fill mode, see *Appointment Lists Window - Wait List Tab (Regular Mode)* on page 37.

Use this tab to search for and view a list of recall appointment records.
APPOINTMENT LISTS WINDOW - RECALLS TAB

Select Patient
This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar.

Patient Info...
This right-click option opens the Patient Info window. For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window on page 70.

Patient Card...
This right-click option opens the Patient Card window with information about the currently selected patient.

For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

Edit Recall...
This right-click option opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 120.

Add Appt Request...
This right-click option opens the New Appointment Request window. For information on the New Appointment Request window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see New Appointment Request Window on page 48.

Make Appointment...
This right-click option opens the New Appointment window. For information on the New Appointment window, see New Appointment Window on page 88.
10.3 Appointment Lists Window - Wait List Tab (Regular Mode)

You can access this window by going to the Appointment Lists window and clicking the Wait List tab. For information on the Appointment Lists window, see Appointment Lists Window on page 28.

Use this tab to view appointments on the wait list for the selected patient. You can also fill open appointment time using this wait list.

The items displayed in the Wait List tab fit the criteria of the selected time block (i.e. the same Clinic, Provider, etc). Highlight an item from the list view and select the Schedule button.

**APPOINTMENT LISTS WINDOW - WAIT LIST TAB (REGULAR MODE)**

<table>
<thead>
<tr>
<th>Type</th>
<th>Chart M</th>
<th>Patient</th>
<th>Key</th>
<th>Provider</th>
<th>Code</th>
<th>Time</th>
<th>Wait Days</th>
<th>Code</th>
<th>Reason</th>
<th>Pri</th>
<th>Not Before</th>
<th>Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned</td>
<td>258</td>
<td>Dave Jones</td>
<td>1123</td>
<td>Dr. Smith</td>
<td>50</td>
<td>Minutes</td>
<td>3</td>
<td>1</td>
<td>SOONER</td>
<td>1</td>
<td>Main Clinic</td>
<td></td>
</tr>
</tbody>
</table>

**Select Patient**
This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar.

**Show History**
This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25.

**Show Wait List History**
This right-click option opens the Wait List History window. For information on the Wait List History window, see Wait List History Window on page 150.
### APPOINTMENT LISTS WINDOW - WAIT LIST TAB (REGULAR MODE)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient Card</strong></td>
<td>This right-click option opens the Patient Card window with information about the currently selected patient. For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Card Window on page 55.</td>
</tr>
</tbody>
</table>
| **Check for Warnings and Errors** | This right-click option is enabled if the following conditions are met:  
  • You are accessing the Appointment Lists window’s Wait List tab using the Appointment Fill mode. For information on the Appointment Fill mode, see Appointment Lists Window - Wait List Tab (Appointment Fill Mode) on page 39.  
  • The record is grayed out.  
  Selecting this right-click option displays the associated warning message explaining the reason for this record being grayed out. |
| **Chart Request**       | This right-click option opens the Request Chart-Out window. For information on the Request Chart-Out window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Request Chart-Out Window on page 143. |
| **Appointment Treatments** | This right-click option opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8. |
| **Notes**               | This right-click option opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40. |
| **Schedule**            | This right-click option is enabled if the highlighted item is an appointment of type Planned or Requested.  
  Clicking this button does one of the following:  
  • If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm books the appointment.  
  • If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm changes the highlighted item in the list view to a hovering appointment block.  
  For information on the Appointment Expert Options window’s Appointments section, see Appointments Section on page 23. |
| **Edit Appointment**    | This right-click option opens the Edit Planned Appointment window or the Edit Appointment window. For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69. For information on the Edit Appointment window, see Edit Appointment Window on page 59. |
| **Edit Wait List Details** | This right-click option opens the Edit Wait List Details window. For information on the Edit Wait List Details window, see Edit Wait List Details Window on page 77. |
| **Remove from List**    | This right-click option opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40.  
  Once a note is entered, the highlighted item is deleted from the list view. |
### Appointment Lists Window - Wait List Tab (Regular Mode)

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change to Request</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Planned. This right-click option opens the Appointment Request window. For information on the Appointment Request window, see Appointment Request Window on page 45. This right-click option changes the highlighted item to appointment type Requested.</td>
</tr>
<tr>
<td>Cancel</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active, Checked In, Checked Out, or Rescheduled. This right-click option cancels the selected appointment. A cancelled appointment is one that either the patient or the provider does not want to attend at this time. This right-click option opens the Cancellation window. For information on the Cancellation window, see Cancellation Window on page 54.</td>
</tr>
<tr>
<td>Fail</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active, Checked In, or Checked Out. This right-click option indicates that either the patient or the provider failed to arrive at their appointment. A failed appointment is one that either the patient did not attend and did not provide notice for. They did not cancel and did not show up.</td>
</tr>
<tr>
<td>Undo Cancel/Fail</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Cancelled or Failed. If the Cancel right-click option or the Fail right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td>Delete</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active, Checked In, Checked Out, Rescheduled, Requested or Planned. This right-click option removes the highlighted item from the Availability tab's Active tab. It also removes the appointment time block from the Scheduler window's Active tab.</td>
</tr>
<tr>
<td>Print Appt Form</td>
<td>This right-click option is enabled if the highlighted item is an appointment of type Active, Checked In, or Checked Out. This right-click option opens the Print Appointment Options window. For information on the Print Appointment Options window, see Print Appointment Options Window on page 107.</td>
</tr>
</tbody>
</table>

### 10.4 Appointment Lists Window - Wait List Tab (Appointment Fill Mode)

This mode is only available by selecting an appointment block in the Scheduler module. To use this mode, go to the Active tab, right-click, and drag an area to select a time block. When you let go of the mouse, axiUm displays a list of options. Select the Fill from Wait List option. axiUm displays the Appointment Lists window’s Wait List tab, in Appointment Fill mode. In
addition to the fields and options available in regular mode, the Appointment Fill mode displays the following:

11 Appointment Notes Window

You can access this window by:

- Going to the Scheduler window’s Active tab, selecting a hovering appointment block, and selecting the Notes right-click option. For information on the Scheduler window’s Active tab, see *Scheduler Window - Active Tab* on page 128.
- Going to the Scheduler window’s Pending tab, highlighting an item from the list view, and selecting the Notes right-click option. For information on the Scheduler window’s Pending tab, see *Scheduler Window - Pending Tab* on page 138.
- Going to the Appointment Lists window’s Appointments tab, highlighting an item from the list view, and selecting the Notes right-click option. For information on the Appointment Lists window’s Appointments tab, see *Appointment Lists Window - Appointments Tab* on page 31.
- Going to the Appointment Lists window’s Wait List tab, highlighting an item from the list view, and selecting the Notes right-click option. For information on the Appointment Lists window’s Wait List tab, see *Appointment Lists Window - Wait List Tab (Regular Mode)* on page 37.
- Going to the New Appointment window and clicking the Notes button. For information on the New Appointment window, see *New Appointment Window* on page 88.
- Going to the Edit Appointment window and clicking the Notes button. For information on the Edit Appointment window, see *Edit Appointment Window* on page 59.

Use this window to create appointment notes, which are a series of prior, in-process and post-appointment notes. Clinical notes should be entered in the EHR module, not here. Appointment notes cannot be edited, they can only be deleted.
**Appointment Notes Window**

<table>
<thead>
<tr>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Deleted</td>
<td>This checkbox, if selected, indicates to search for deleted appointment notes that are no longer used in axiUm but can still be used for reporting purposes. Deleted appointment notes are displayed in the list view in gray text.</td>
</tr>
<tr>
<td>Note</td>
<td>This text box indicates any free-form text about the selected appointment.</td>
</tr>
<tr>
<td>Clear Data</td>
<td>Clicking this icon clears the user-entry fields. By clearing the fields, axiUm allows you to enter a new record.</td>
</tr>
<tr>
<td>Add a new Record</td>
<td>Clicking this icon adds the new appointment note you entered, and displays it in the list view.</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Clicking this icon permanently deletes the item selected from the list view.</td>
</tr>
</tbody>
</table>
12 Appointment Planning Window

You can access this window by:

- Going to the Patient Appointments window and clicking the Planning button. For information on the Patient Appointments window, see Patient Appointments Window on page 100.
- Going to the Family Appointments window and clicking the Planning button. For information on the Family Appointments window, see Family Appointments Window on page 79.

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.
**Appointment Planning Window**

**Show Scheduled**
This checkbox, if selected, displays planned and in-process treatments (unless they are associated to the selected appointment in the appointments list). If no appointment is selected, or if multiple appointments are selected, axiUm displays all planned and in-process treatments. Selecting this checkbox shows the *Appt Date* column in the *Planned Treatments* list view.

This checkbox, if deselected, hides treatments associated to an appointment (unless the appointment is cancelled, failed, or deleted).

**Mode**
This section indicates the appointment planning mode to run when using this window, and displays the following options:

- *Appointment Planning*: Select this option to add planned appointments and assign treatments, and also to set up and maintain appointment series.
- *Booking*: Select this option to define the booking order of appointments and appointment series.

**Show Treatments**
This checkbox, if selected, displays treatments associated to each appointment and lists them directly below the appointment record. axiUm shows the *Site* column and the *Surface* column in the right list view.

This checkbox, if deselected, hides treatment records from the list view.

**Show Past**
This checkbox, if selected, includes past appointments in the list view.

This checkbox, if deselected, hides appointments that are checked out. axiUm also hides active and checked-in appointments in the past.

**New Appt...**
Clicking this button displays the *New Planned Appointment* window. For information on the *New Planned Appointment* window, see *New Planned Appointment Window* on page 95.

**Create Series**
This right-click option is enabled if you highlight a record in the *Unbooked* list group.

This right-click option displays the *Appointment Series* window. For information on the *Appointment Series* window, see *Appointment Series Window* on page 51.

**Add to Series**
This right-click option is enabled if the highlighted record in the right list view is an appointment that is not part of a series.

Selecting this right-click option displays the *Appointment Series* window. For information on the *Appointment Series* window, see *Appointment Series Window* on page 51.

**Edit Series**
This right-click option is enabled if you highlight a record in the right list view’s *Series* list group.

Selecting this right-click option in the right list view displays the *Appointment Series* window. For information on the *Appointment Series* window, see *Appointment Series Window* on page 51.

**Remove from Series**
This right-click option is enabled if you highlight a record in the right list view’s *Series* list group.

Selecting this right-click option deletes the record from the list view.
13 Appointment Report Window

You can access this window by going to the Scheduler window’s Active tab and clicking (Print View). For information on the Scheduler window’s active tab, see Scheduler Window - Active Tab on page 128.

Use this window to print the contents of the Scheduler window’s Active tab.

**Appointment Report Window**

- **Date**
  - This field indicates the date for which to run the report for the selected tab.

- **Start**
  - This field indicates the start time on the date indicated in the Date field for which to run the Appointment List report.

- **End**
  - This field indicates the end time on the date indicated in the Date field for which to run the Appointment List report.

- **Portrait**
  - This option, if selected, indicates that the report's page orientation uses portrait format.

- **Landscape**
  - This option, if selected, indicates that the report's page orientation uses landscape format.

- **Columns per Page**
  - This field indicates the number of columns to display in the report. axiUm can display up to eight columns in portrait format, or 10 columns in landscape format.

- **No. of Copies**
  - This field indicates the number of copies of the Appointment List report to print.

- **OK**
  - Clicking this button saves the entries, closes the Appointment Report window, and prints the Appointment List report to the default printer.

- **Cancel**
  - Clicking this button cancels any entries and closes the Appointment Report window.
14 Appointment Request Window

You can access this window by:

- Going to the Patient Appointments window’s list view and double-clicking a record (of type Requested). For information on the Patient Appointments window, see Patient Appointments Window on page 100.

- Going to the Family Appointments window’s list view and double-clicking a record (of type Requested). For information on the Family Appointments window, see Family Appointments Window on page 79.

- Going to the Appointment Lists window’s Appointments tab, and in the list view, double-clicking a record (of type Requested). For information on the Appointment Lists window’s Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.

- Going to the Appointment Lists window’s Wait List tab, and in the list view, double-clicking a record (of type Requested). For information on the Appointment Lists window’s Wait List tab, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

- Going to the Scheduler module’s Availability tab (in any three sub-tabs), highlighting a planned appointment, and selecting the Change to Request right-click option.

Use this window to:

- Book the appointment for a provider (e.g. students asking their group manager to book appointments for them).

- Review and make changes to an existing appointment request.

- Change a planned appointment into a new appointment request.
**APPOINTMENT REQUEST WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[name]</td>
<td>This static field displays the patient’s title, last name, first name, and chart number, as entered in the Patient Info window’s Personal tab’s Name section. For information on the Patient Info window’s Personal tab’s Name section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Name Section on page 72.</td>
</tr>
<tr>
<td>Provider</td>
<td>This field indicates the provider number of the provider treating the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td>2nd Provider</td>
<td>This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td>Appt. Code</td>
<td>This drop-down field indicates the appointment code for the appointment you are booking. The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Appointment Code Window on page 649.</td>
</tr>
<tr>
<td>Tx Discipline</td>
<td>This drop-down field indicates the discipline under which the requested appointment belongs. This drop-down field defaults to the discipline associated with the appointment code displayed in the Appt. Code drop-down field. The options in this drop-down field are defined in the Treatment Discipline window. For information on the Treatment Discipline window, refer to the axiUm Reference Manual for Treatment Disciplines Window on page 87.</td>
</tr>
<tr>
<td>Appt. Status</td>
<td>This drop-down field indicates the status of the appointment you are requesting. 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 Status Codes Window on page 18.</td>
</tr>
<tr>
<td>Clinic</td>
<td>This drop-down field indicates the clinic you want for this requested appointment. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
</tbody>
</table>
**Appointment Request Window**

**Instructor**  
This field indicates the last name and first name of the instructor used in the search criteria. During the search process, axiUm considers the selected instructor’s availability based on their schedule defined in the Instructor Working Schedules window. For information on the Instructor Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see Instructor Working Schedules Window on page 710.

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 35.

**Not Before**  
This field indicates that this appointment is requested for a date no earlier than the date displayed in this field.

**Date**  
This field indicates the date for the requested appointment.

**Session**  
This drop-down field indicates the clinic session which this appointment was booked.

**Time**  
This field indicates the time for the requested appointment.

**Reason**  
This text box displays a short description of the reason for the planned appointment.

axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window's Appointment Code section. For information on the Appointment Code window's Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Section on page 651.

**Recall**  
This checkbox, if selected, indicates that this appointment is a planned recall appointment to a treatment follow-up.

If the Appt. Code drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox.

The drop-down field indicates the type of recall appointment you want to plan for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank.

**Note**  
This text box displays a detailed description of the reason for the planned appointment.

**Alert Staff**  
This checkbox, if selected, indicates to alert the staff of the appointment request. Selecting this checkbox displays the appointment request in the Personal Planner module’s Appointments tab’s list view. For information on the Personal Planner module’s Appointment tab, refer to the axiUm Reference Manual for Personal Planner and see Personal Planner Window - Appointments Tab on page 5.

**Alert Provider**  
This checkbox, if selected, indicates to alert the provider of the appointment request. Selecting this checkbox displays the appointment request in the Personal Planner module’s Appointments tab’s list view. Both the main provider and the second provider are alerted. For information on the Personal Planner module’s Appointment tab, refer to the axiUm Reference Manual for Personal Planner and see Personal Planner Window - Appointments Tab on page 5.

**Accept**  
Clicking this button saves the entries and closes the Appointment Request window.

**Cancel**  
Clicking this button cancels any entries and closes the Appointment Request window.
**APPOINTMENT REQUEST WINDOW**

**Tx Plan...**  
Clicking this button opens the *Appointment Treatments* window. For information on the *Appointment Treatments* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Appointment Treatments Window* on page 8.

**Recalls...**  
Clicking this button opens the *Patient Recalls* window. For information on the *Patient Recalls* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Patient Recalls Window* on page 12.

**Clear Note**  
Clicking this button clears any unsaved entries in the Note text box.

**Add Note**  
Clicking this button saves the entries in the Note text box and displays it in the list view.

**Delete Note**  
Clicking this button deletes the highlighted note from the list view.

---

**15 Appointment Reserve Info Window**

You can access this window by:

- Going to the Appointment Expert window (in regular mode) and selecting the View Appt Details right-click option. For information on the Appointment Expert window (regular mode), see *Appointment Expert Window (Regular Mode)* on page 12.

- Going to the Appointment Expert window (in preview mode) and selecting the View Appt Details right-click option. For information on the Appointment Expert window (preview mode), see *Appointment Expert Window (Preview Mode)* on page 18.

Use this window to view details of all appointments associated to the selected search result.
16 Appointment Scheduling Rules (Expert Settings) Window

You can access this window by going to the Appointment Expert Options window and clicking the Rules button. For information on the Appointment Expert Options window, see Appointment Expert Options Window on page 19.

Use this window to determine what rules the Appointment Expert window (in regular mode) will use for this workstation. The scheduling rules in this window apply only to the Appointment Expert window (in regular mode), and only for this workstation.

<table>
<thead>
<tr>
<th>Enforced Preferred Discipline</th>
<th>This checkbox, if selected, indicates to enforce the provider’s preferred discipline.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This checkbox works in conjunction with the Enforce Preference checkbox of the Provider Ideal Day Settings window’s Preferences section. For information on the Provider Ideal Day Settings window’s Preferences section, refer to the axiUm Reference Manual for Maintenance and see Preferences Section on page 746.</td>
</tr>
</tbody>
</table>
### Appointment Scheduling Rules (Expert Settings) Window

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Restricted ‘Not to Do’ Disciplines</strong></td>
<td>This checkbox, if selected, indicates to enforce the disciplines the provider does not prefer to perform.</td>
<td>This checkbox works in conjunction with the Do not do section’s Discipline drop-down fields in the Provider Ideal Day Settings window’s Preferences section. For information on the Provider Ideal Day Settings window’s Preferences section, refer to the axiUm Reference Manual for Maintenance and see Preferences Section on page 746.</td>
</tr>
<tr>
<td><strong>Restricted Preferred Appointment Codes</strong></td>
<td>This checkbox, if selected, indicates to enforce those appointment codes the provider prefers to perform.</td>
<td>This checkbox works in conjunction with the Detailed Ideal Day Settings window. For information on the Detailed Ideal Day Settings window, refer to the axiUm Reference Manual for Maintenance and see Detailed Ideal Day Settings Window on page 747.</td>
</tr>
<tr>
<td><strong>Limited Appointment Codes</strong></td>
<td>This checkbox, if selected, indicates that axiUm will consider the rules set up in the Limited Appointment Codes window for when you use the Appointment Expert window (in regular mode) to search for appointment openings for the selected provider.</td>
<td>For information on the Limited Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see Limited Appointment Codes Window on page 726. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.</td>
</tr>
<tr>
<td><strong>Limited Provider Exams (for Preventive Care)</strong></td>
<td>This checkbox, if selected, indicates that axiUm will limit provider exam rules for preventive care type appointments.</td>
<td></td>
</tr>
<tr>
<td><strong>Hold Times</strong></td>
<td>This checkbox, if selected, indicates that axiUm will consider hold time rules.</td>
<td>This checkbox works in conjunction with the Hold Time Reasons window. For information on the Hold Time Reasons window, axiUm Reference Manual for Maintenance and see Hold Time Reasons Window on page 704.</td>
</tr>
<tr>
<td><strong>Break Times</strong></td>
<td>This checkbox, if selected, indicates that axiUm will consider break time rules.</td>
<td>This checkbox works in conjunction with the Break Times window. For information on the Break Times window, refer to the axiUm Reference Manual for Maintenance see Break Times Window on page 678.</td>
</tr>
<tr>
<td><strong>Alternative Providers (for Preventive Care)</strong></td>
<td>This checkbox, if selected, indicates that axiUm will consider alternative providers for preventive care type appointments</td>
<td></td>
</tr>
</tbody>
</table>
**Appointment Series Window**

You can access this window by going to the Appointment Planning window and selecting the Create Series right-click option, the Add to Series right-click option, or the Edit Series right-click option. For information on the Appointment Planning window, see *Appointment Planning Window* on page 42.

Use this window to create and modify the selected appointment series.
**APPOINTMENT SERIES WINDOW**

**Modify Record**
Clicking this icon saves any modifications you made to the item selected from the list view.

**Delete Record**
Clicking this icon permanently deletes the item selected from the list view.

**Series Number**
This field indicates a unique number to identify this appointment series.

**Description**
This field indicates the full name of this appointment series.

**Appointment Reason**
This is the appointment reason as entered in the following windows:

- **New Appointment window.** For information on the *New Appointment* window, see *New Appointment Window* on page 88.

- **Edit Appointment window.** For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

- **New Planned Appointment window.** For information on the *New Planned Appointment* window, see *New Planned Appointment Window* on page 95.

- **Edit Planned Appointment window.** For information on the *Edit Planned Appointment* window, see *Edit Planned Appointment Window* on page 69.
18 Appt. Books Window

You can access this window by clicking (Book) from the following tabs in the Scheduler window:

- Active tab. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.
- Pending tab. For information on the Scheduler window’s Pending tab, see Scheduler Window - Pending Tab on page 138.
- Weekly tab. For information on the Scheduler window’s Weekly tab, see Scheduler Window - Weekly Tab on page 142.
- Monthly tab. For information on the Scheduler window’s Monthly tab, see Scheduler Window - Monthly Tab on page 147.

Use this window to select the book to display in the Scheduler window. The highlighted item in the list view is the currently selected book.
19 Cancellation Window

You can access this window by going to the Scheduler window’s Active tab, selecting a booked appointment block or a hovering appointment block, and selecting the Cancel right-click option. For information on the Scheduler window’s Active tab, see *Scheduler Window - Active Tab* on page 128.

This window works in conjunction with the Clinics window’s Charge for Cancelled Appt. drop-down field. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see *Clinics Window* on page 693.

Use this window to indicate a cancellation reason.
**Cancellation Window**

<table>
<thead>
<tr>
<th>Reason</th>
<th>This drop-down field indicates the reason for the academic cancellation. The options in this drop-down field are defined in the Missed Appointment Codes window. For information on the Missed Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see Missed Appointment Codes Window on page 731.</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Charge</td>
<td>This checkbox is disabled if the Charge for Cancelled Appt drop-down field in the Clinics window displays the No option. This checkbox is enabled if the following conditions are set up:  • The Charge for Cancelled Appt drop-down field in the Clinics window displays the Yes (Automatic) option or the Yes (Prompt) option.  • For the selected cancellation code, the associated Missed Appointment Codes window’s Office Charge field displays an office charge code. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693. This checkbox, if selected, indicates that the selected missed appointment code has no charges.</td>
</tr>
<tr>
<td>OK</td>
<td>If the Charge for Cancelled Appt drop-down field in the Clinics window displays the Yes (Automatic) option, and the No Charge checkbox is selected, clicking this button saves the selection and closes the Failed Appointment window. If the Charge for Cancelled Appt drop-down field in the Clinics window displays the Yes (Prompt) option, and the No Charge checkbox is deselected, clicking this button displays the Missed Appointment Charge window. For information on the Missed Appointment Charge window, see Missed Appointment Charge Window on page 86. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any selection and closes the Cancellation window.</td>
</tr>
</tbody>
</table>

20 Clinics Window

For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.
21 Daily Layout Window

You can access this window by going to the Scheduler window’s Chair tab and selecting the Daily Layout right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

Use this window to make chair reservations for providers for the selected day only. You can also set up discipline, group, and instructors for select chairs. Daily layouts override session layouts. For information on the Session Layout window, see Session Layout Window on page 148.

**Daily Layout Window**

<table>
<thead>
<tr>
<th>Clinic</th>
<th>This disabled field indicates the name of the selected clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discipline</td>
<td>This drop-down field indicates the discipline selected for this daily layout.</td>
</tr>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Discipline Codes window. For information on the Discipline Codes window, refer to the axiUm Reference Manual for Maintenance and see Discipline Codes Window on page 228.</td>
</tr>
<tr>
<td>Date</td>
<td>This disabled field indicates today’s date.</td>
</tr>
<tr>
<td>Group</td>
<td>This drop-down field indicates the provider group selected for this daily layout.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
**Daily Layout Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>This disabled field indicates the session associated to the selected clinic displayed in the Clinic field.</td>
</tr>
<tr>
<td>Inst. / User</td>
<td>This disabled field indicates the name of the instructor assigned to this daily layout.</td>
</tr>
<tr>
<td>Criteria</td>
<td>In this field, enter the first character(s) of the search criteria. Entering an underscore ( _ ) displays all results within the selected search option.</td>
</tr>
<tr>
<td>Search On</td>
<td>This drop-down field displays the following search options: Provider #, Last Name, First Name, Year, Group.</td>
</tr>
<tr>
<td>Provider Group</td>
<td>This drop-down field indicates the provider group used in the search criteria.</td>
</tr>
<tr>
<td>Provider Type</td>
<td>This drop-down field indicates the provider type used in the search criteria. The options available in this drop-down field are defined in the Provider Type Codes window. For information on the Provider Type Codes window, refer to the axiUm Reference Manual for Maintenance and see Provider Type Codes Window on page 453.</td>
</tr>
<tr>
<td>Search</td>
<td>Clicking this button starts the search process.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the entries and closes the Daily Layout window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any entries and closes the Daily Layout window.</td>
</tr>
</tbody>
</table>

### 22 Discipline/Group Layout Window

You can access this window by going to the Scheduler window’s Chair tab and selecting the Session Layouts right-click option. For information on the Scheduler window’s Chair tab, see `Scheduler Window - Chair Tab` on page 124.

Use this window to define this clinic’s session.
**DISCIPLINE/GROUP LAYOUT WINDOW**

**Show Past**
This checkbox, if selected, indicates the list view includes clinic holidays from past dates. Selecting this checkbox refreshes the list view to include past clinic holidays.

**Clinic**
This drop-down field indicates the clinic you want to select for this discipline layout or group layout.

The options in this drop-down field are defined in the **Clinics** window. For information on the **Clinics** window, refer to the axiUm Reference Manual for Maintenance and see **Clinics Window** on page 693.

**Description**
This field indicates a short description of this discipline layout or group layout.

**From Date**
This field indicates the date from which this discipline layout or group layout is to start.

**To Date**
This field indicates the date from which this discipline layout or group layout is to end.

**Mon - Sun**
These checkboxes, when selected, indicate the day of the week to apply this discipline layout or group layout.

This section displays the following checkboxes: **Mon**, **Tue**, **Wed**, **Thu**, **Fri**, **Sat**, and **Sun**.

**Session**
This drop-down field indicates the clinic session applied to this discipline layout or group layout.

The options in this drop-down field are defined in the **Sessions** window. For information on the **Sessions** window, refer to the axiUm Reference Manual for Maintenance and see **Sessions Window** on page 696.
**DISCIPLINE/GROUP LAYOUT WINDOW**

- **Clear Data**
  Clicking this icon clears the user-entry fields. By clearing the fields, axiUmd allows you to enter a new record.

- **Add a new Record**
  Clicking this icon adds the new discipline or group layout record you entered, and displays it in the list view.

- **Modify Record**
  Clicking this icon saves any modifications you made to the item selected from the list view.

- **Delete Record**
  Clicking this icon permanently deletes the item selected from the list view.

- **Preview Report**
  Clicking this icon displays the Discipline/Group Layout report.

- **Print Report**
  Clicking this icon prints the Discipline/Group Layout report to the default printer.

- **Session Layout**
  Clicking this icon displays the Session Layout window. For information on the Session Layout window, see *Session Layout Window* on page 148.

---

**23 Edit Appointment Window**

You can access this window by:

- Going to the Patient Appointments window’s list view and double-clicking a record (of type Active, Checked Out, Pending(Wait), or Rescheduled). For information on the Patient Appointments window, see *Patient Appointments Window* on page 100.

- Going to the Family Appointments window’s list view and double-clicking a record (of type Active, Checked Out, Pending(Wait), or Rescheduled). For information on the Family Appointments window, see *Family Appointments Window* on page 79.

- Going to the Appointment Lists window’s Appointments tab’s list view and double-clicking a record (of type Active). For information on the Appointment Lists window’s Appointments tab, see *Appointment Lists Window - Appointments Tab* on page 31.

Use this window to view and edit an appointment.
EDIT APPOINTMENT WINDOW

Reason
This text box displays a short description of the reason for the planned appointment.

axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window's Appointment Code section. For information on the Appointment Code window's Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Section on page 651.

Accept
Clicking this button saves the entries and closes the Edit Appointment window

Cancel
Clicking this button cancels any entries and closes the Edit Appointment window.

Add'l Providers
Clicking this button opens the Appointment Additional Providers window. For information on the Appointment Additional Providers window, see Appointment Additional Providers Window on page 11.

Tx. Plan...
Clicking this button opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8.

Recalls...
Clicking this button opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 120.

Notes...
Clicking this button opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40.

23.1 Patient Section

Use this section to view patient information on the selected appointment.
**EDIT APPOINTMENT WINDOW - PATIENT SECTION**

**[name]**
This static field displays the patient’s title, last name, first name, and chart number, as entered in the *Patient Info* window’s *Personal* tab’s *Name* section. For information on the *Patient Info* window’s *Personal* tab’s *Name* section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Name Section* on page 72.

**[address]**
This static field displays the patient’s address, as entered in the *Patient Info* window’s *Personal* tab’s *Home Address* section. For information on the *Patient Info* window’s *Personal* tab’s *Home Address* section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Home Address Section* on page 74.

**Home**
**Work**
**Other**
These static fields display the patient’s home number, work number, and alternative number, as entered in the *Patient Info* window’s *Personal* tab’s *Telephone* section. For information on the *Patient Info* window’s *Personal* tab’s *Telephone* section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Telephone Section* on page 75.

**Faculty**
This drop-down field is available if the *Scheduler Options* window’s *Appt Entry Window* section displays the Ortho option. For information on the *Scheduler Options* window’s *Appt Entry Window section*, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This disabled field displays the last name and first name of the faculty member, as entered in the *Patient Info* window’s *Personal* tab’s *Assignment* section, but only if the assigned faculty is from a discipline of type Ortho, as entered in the *Discipline* drop-down field of the *Faculty Assignments* window.

For information on the *Patient Info* window’s *Personal* tab’s *Assignment* section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Assignment Section* on page 78.

For information on the *Faculty Assignments* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Faculty Assignments Window* on page 31.

### 23.2 Appointment Section

Use this section to view and edit details for the selected appointment.
**EDIT APPOINTMENT WINDOW - APPOINTMENT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Ortho Stage Appointment</td>
<td>This checkbox is available if the Ortho option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This checkbox, if selected, indicates this appointment satisfies a specific stage of ortho care. Selecting this checkbox disables the Appt. Code drop-down field and displays the Stage drop-down field. Deselecting this checkbox hides the Stage drop-down field and the Minutes field. It also automatically enters the default reason in the Reason text box. You can deselect this checkbox to book a regular (i.e., non-ortho) appointment.</td>
</tr>
<tr>
<td>Provider</td>
<td>This field indicates the provider number of the provider treating the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td>2nd Provider</td>
<td>This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
</tbody>
</table>
**EDIT APPOINTMENT WINDOW - APPOINTMENT SECTION**

**Sched. 2nd For**
This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the aXiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment.

This drop-down field displays the following options:

- **Other Time**: If this provider is booked as a second provider, they will be defaulted to an assistant's time.
- **Provider Time**: If this provider is booked as a second provider, they will be defaulted to a provider's time.
- **Total Time**: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment.

**Appt. Code**
This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is deselected.

This drop-down field is disabled and set to the default ortho appointment code if the Is Ortho Stage Appointment checkbox is deselected. The default ortho appointment code is defined in the Ortho Appointment Code drop-down field of the Practice Options window's Ortho Settings section. For information on the Practice Options window's Ortho Settings section, refer to the aXiUm Reference Manual for Maintenance and see Ortho Settings Section on page 443.

This drop-down field indicates the appointment code for the appointment you are booking.

The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the aXiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.

**Stage**
This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window's Appt Entry Window section, refer to the aXiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is selected.

This drop-down field indicates the ortho stage for the appointment you are booking.

The options in this drop-down field are defined in the Stage Codes window. For information on the Stage Codes window, refer to the aXiUm Reference Manual for Maintenance and see Stage Codes Window on page 547.
**EDIT APPOINTMENT WINDOW - APPOINTMENT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Tx Discipline** | This drop-down field indicates the discipline under which the appointment treatment belongs.  
                       This drop-down field defaults to the discipline associated with the appointment code displayed in the *Appt. Code* drop-down field.  
                       The options in this drop-down field are defined in the *Treatment Discipline* window. For information on the *Treatment Discipline* window, refer to the axiUm Reference Manual for Maintenance and see *Treatment Disciplines Window* on page 87.  
                       If the *Is Ortho Stage Appointment* checkbox is selected, this drop-down field is limited to displaying only ortho-type disciplines. |
| **Appt. Status** | This drop-down field indicates the status of the appointment you are booking.  
                       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. |
| **Rank**       | This drop-down field is available if the *Scheduler Options* window's *Appt Entry Window* section displays the *Advanced* option. For information on the *Scheduler Options* window's *Appt Entry Window* section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.  
                       This field is for internal purposes and indicates a numeric ranking of an appointment’s importance that can be used to make cancellation decisions when chairs are limited. |
| **Recall**     | This checkbox, if selected, indicates that this appointment is a recall appointment to a treatment follow-up.  
                       If the *Appt. Code* drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox.  
                       The drop-down field indicates the type of recall appointment you want to make for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank. |

23.3 **Pt Information Section**

Use this section to view and edit other patient information for the selected appointment.

![Pt Information](image)
EDIT APPOINTMENT WINDOW - PT INFORMATION SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pt Status</td>
<td>This static field displays the patient’s status, as entered in the Status drop-down field of the Patient Info window’s Personal tab’s Personal section. For information on the Personal tab’s Personal section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Personal Section on page 73.</td>
</tr>
<tr>
<td>Time</td>
<td>This field indicates the best time to contact the patient, as entered in the Time field of the Patient Info window’s Personal tab’s Contact section. For information on the Personal tab’s Contact section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Contact Section on page 76.</td>
</tr>
<tr>
<td>Pref. Time</td>
<td>This field indicates the best time to schedule an appointment for this patient, as entered in the Pref. Appt field of the Patient Info window’s Codes tab’s Additional section. For information on the Codes tab’s Additional section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Additional Section on page 79.</td>
</tr>
<tr>
<td>Patient Due</td>
<td>This disabled displays the total amount the patient owes to date.</td>
</tr>
<tr>
<td>Estimate $</td>
<td>This field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This field indicates the estimate for this appointment treatment.</td>
</tr>
<tr>
<td>Tx Plan Total</td>
<td>This disabled field displays the total amount of the treatment plan.</td>
</tr>
</tbody>
</table>

23.4 Appt Details Section

Use this section to view and edit other appointment details for the selected appointment.

EDIT APPOINTMENT WINDOW - APPT DETAILS SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>This static field displays the time of the appointment. This static field is calculated in conjunction with the Appt. Code drop-down field.</td>
</tr>
<tr>
<td>Minutes</td>
<td>This field is enabled if the Is Ortho Stage Appointment checkbox is selected. This field indicates the number of minutes required for this ortho appointment you are booking.</td>
</tr>
</tbody>
</table>
24 Edit Clinic Time Description Window

You can access this window by:

- Going to the Scheduler window’s Active tab, highlighting an available time block, and selecting the Edit Clinic Time Description right-click option.
- Going to Scheduler window’s Weekly tab, highlighting an available time block, and selecting the Edit Clinic Time Description right-click option.

Use this window to reserve a clinic time. The reserved time hours are displayed in the Scheduler window’s Active tab, displaying the color defined in the Clinic Time Reasons window. For information on the Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see Clinic Time Reasons Window on page 689. The description is also displayed in the time block, portraying the work being performed during this reserved session.
You can access this window by going to the Scheduler window’s Chair tab and selecting the Edit Partial Clinic Times right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

Use this window to edit clinic times for the selected date.
EDIT PARTIAL CLINIC TIMES WINDOW

Date
This disabled field indicates the selected date as displayed in the taskbar.

Clinic
This disabled field indicates the selected clinic as displayed in the Scheduler window's title bar.

Session
This disabled field indicates the selected clinic's current session, as displayed in the Chair tab's title bar.

Provider
This disabled field indicates the provider ID associated to the selected chair.

From
This field indicates the start time range for this partial clinic time.

To
This field indicates the end time range for this partial clinic time.

Description
This field indicates a description for this partial clinic time.

Clicking (ellipsis) opens the Clinic Time Reasons window. For information on the Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see Clinic Time Reasons Window on page 689.

OK
Clicking this button saves the entries and closes the Edit Partial Clinic Times window.

Cancel
Clicking this button cancels any entries and closes the Edit Partial Clinic Times window.
26 Edit Planned Appointment Window

You can access this window by:

- Going to the Patient Appointments window’s list view and double-clicking a record (of type Planned). For information on the Patient Appointments window, see Patient Appointments Window on page 100.

- Going to the Family Appointments window’s list view and double-clicking a record (of type Planned). For information on the Family Appointments window, see Family Appointments Window on page 79.

- Going to the Appointment Lists window’s Appointments tab, and in the list view, double-clicking a record (of type Planned). For information on the Appointment Lists window’s Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.

Use this window to view and edit a planned appointment.

![Edit Planned Appointment Window](image)

**EDIT PLANNED APPOINTMENT WINDOW**

This static field displays the patient’s title, last name, first name, and chart number, as entered in the Patient Info window’s Personal tab’s Name section. For information on the Patient Info window’s Personal tab’s Name section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Name Section on page 72.

**Provider**

This field indicates the provider number of the provider treating the patient at this planned appointment.

Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.
EDIT PLANNED APPOINTMENT WINDOW

2nd Provider
This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this planned appointment.

Clicking ... (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.

Sched. 2nd For
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field displays the following options:

- **Other Time**: If this provider is booked as a second provider, they will be defaulted to an assistant’s time.
- **Provider Time**: If this provider is booked as a second provider, they will be defaulted to a provider’s time.
- **Total Time**: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment.

Appt. Code
This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is deselected.

This drop-down field is disabled and set to the default ortho appointment code if the Is Ortho Stage Appointment checkbox is deselected. The default ortho appointment code is defined in the Ortho Appointment Code drop-down field of the Practice Options window’s Ortho Settings section. For information on the Practice Options window’s Ortho Settings section, refer to the axiUm Reference Manual for Maintenance and see Ortho Settings Section on page 443.

This drop-down field indicates the appointment code for the appointment you are planning.

The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.

Tx Discipline
This drop-down field indicates the discipline under which the planned appointment treatment belongs.

This drop-down field defaults to the discipline associated with the appointment code displayed in the Appt. Code drop-down field.

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

Appt. Status
This drop-down field indicates the status of the appointment you are planning.

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.
**EDIT PLANNED APPOINTMENT WINDOW**

**Clinic**
This drop-down indicates the clinic you want for this planned appointment.

The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.

**Instructor**
This field indicates the last name and first name of the instructor used in the search criteria. During the search process, axiUm considers the selected instructor’s availability based on their schedule defined in the Instructor Working Schedules window. For information on the Instructor Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see Instructor Working Schedules Window on page 710.

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 35.

**Not Before**
This field indicates that this appointment is planned for a date no earlier than the date displayed in this field.

**Recall**
This checkbox, if selected, indicates that this appointment is a planned recall appointment to a treatment follow-up.

If the Appt. Code drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox.

The drop-down field indicates the type of recall appointment you want to plan for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank.

**Reason**
This text box displays a short description of the reason for the planned appointment.

axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window’s Appointment Code section. For information on the Appointment Code window’s Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Section on page 651.

**Tx Plan Total**
This field is available if the Scheduler Options window’s Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled field displays the total amount of the ortho treatment plan.

**Note**
This text box displays a detailed description of the reason for the planned appointment.

**Alert Staff**
This checkbox, if selected, indicates to alert the staff of the appointment request. Selecting this checkbox displays the appointment request in the Personal Planner module’s Appointments tab’s list view. For information on the Personal Planner module’s Appointment tab, refer to the axiUm Reference Manual for Personal Planner and see Personal Planner Window - Appointments Tab on page 5.
**EDIT PLANNED APPOINTMENT WINDOW**

**Alert Provider**
This checkbox, if selected, indicates to alert the provider of the appointment request.

Selecting this checkbox displays the appointment request in the Personal Planner module's Appointments tab's list view. Both the main provider and the second provider are alerted. For information on the Personal Planner module's Appointment tab, refer to the axiUm Reference Manual for Personal Planner and see Personal Planner Window - Appointments Tab on page 5.

**Patient Due**
This disabled displays the total amount the patient owes to date.

**Estimate**
This field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This field indicates the estimate for this appointment treatment.

**Appt Total**
This disabled field displays the total amount of the treatment in this planned appointment.

**Provider Time (Minutes)**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This section indicates to change the appointment duration using the total time required by the providers and assistants. For each new appointment, you can enter up to three provider times (using the Provider field) and three assistant times (using the Other fields).

**[indicator]**
This indicator displays ON WAIT LIST if this appointment was selected from the Appointment Lists window’s Wait List tab’s list view. For information on the Appointment Lists window’s Wait List tab, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

**Accept**
Clicking this button saves the entries and closes the Edit Planned Appointment window.

**Cancel**
Clicking this button cancels any entries and closes the Edit Planned Appointment window.

**Add’l Providers**
Clicking this button opens the Appointment Additional Providers window. For information on the Appointment Additional Providers window, see Appointment Additional Providers Window on page 11.

**Tx Plan...**
Clicking this button opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8.

**Recalls...**
Clicking this button opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 120.

**Clear Note**
Clicking this button clears any unsaved entries in the Note text box.

**Add Note**
Clicking this button saves the entries in the Note text box and displays it in the list view.

**Delete Note**
Clicking this button deletes the highlighted note from the list view.
27 Edit Provider Non-Clinic Times Window

You can access this window by going to the Scheduler window’s Active tab, going to a non-clinic time block, and selecting the Edit Non-Clinic Time right-click option.

Use this window to edit the selected provider’s unavailable time at the clinic.

ADD PROVIDER NON-CLINIC TIMES WINDOW

**OK**
Clicking this button saves the entries and closes the *Edit Provider Non-Clinic Times* window.

**Cancel**
Clicking this button cancels any entries and closes the *Edit Provider Non-Clinic Times* window.

27.1 Non-Clinic Time Section

Use this section to edit the selected provider’s non-clinic time schedule.
### EDIT PROVIDER NON-CLINIC TIMES WINDOW - NON-CLINIC TIME SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>This disabled field indicates the name of the provider as displayed in the Scheduler window's taskbar. For information on the Scheduler window, see Scheduler Window on page 121.</td>
</tr>
<tr>
<td>Description</td>
<td>This field is the full name of the non-clinic time reason.</td>
</tr>
<tr>
<td></td>
<td>Clicking (ellipsis) opens the Non-Clinic Time Reasons window. For information on the Non-Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see Non-Clinic Time Reasons Window on page 734.</td>
</tr>
<tr>
<td>Display Desc.</td>
<td>This field indicates the description of the non-clinic time.</td>
</tr>
<tr>
<td>Date</td>
<td>This field indicates the time-off date. If the time-off date is a recurring item, this field indicates the first day of the recurring week or month.</td>
</tr>
<tr>
<td>Color</td>
<td>This field indicates the color used to display the reason for the non-clinic time.</td>
</tr>
<tr>
<td>Partial Day</td>
<td>This checkbox, if selected, indicates this time-off day is a partial day.</td>
</tr>
<tr>
<td></td>
<td>Selecting this checkbox enables the Time Range field and the To field.</td>
</tr>
<tr>
<td>Time Range</td>
<td>This field is enabled if the Partial Day checkbox is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the time at which the partial time-off day starts.</td>
</tr>
<tr>
<td>To</td>
<td>This field is enabled if the Partial Day checkbox is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the time at which the partial time-off ends.</td>
</tr>
<tr>
<td>Is a recurring item</td>
<td>This disabled checkbox, if selected, indicates this time-off day is a recurring item, starting on the date displayed in the Date field.</td>
</tr>
<tr>
<td></td>
<td>Selecting this checkbox enables the fields and options in the Recurrance Pattern section. For information on the Recurrence Pattern section, see Recurrence Pattern Section on page 4.</td>
</tr>
<tr>
<td>Weekly</td>
<td>This option is enabled if the Is a recurring item option is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the recurrence pattern of the cycle indicated using the Weekly option or Monthly option.</td>
</tr>
<tr>
<td></td>
<td>Selecting this option displays the Recur every __ week(s) field in the Recurrance Pattern section. For information on the Recurrence Pattern section, see Recurrence Pattern Section on page 4.</td>
</tr>
<tr>
<td>Monthly</td>
<td>This option is enabled if the Is a recurring item option is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the recurrence pattern of the cycle indicated using the Weekly option or Monthly option.</td>
</tr>
<tr>
<td></td>
<td>Selecting this option displays the Recur every __ month(s) field in the Recurrance Pattern section. For information on the Recurrence Pattern section, see Recurrence Pattern Section on page 4.</td>
</tr>
</tbody>
</table>
EDIT PROVIDER NON-CLINIC TIMES WINDOW - NON-CLINIC TIME SECTION

Qualifies as a break

This checkbox, if selected, indicates that this non-clinic time satisfies any overlapping break time rules defined in the Break Times window. For information on the Break Times window, refer to the axiUm Reference Manual for Maintenances and see Break Times Window on page 678.

This checkbox defaults to the Qualifies as a break checkbox in the Non-Clinic Time Reasons window. For information on the Non-Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see Non-Clinic Time Reasons Window on page 734.

27.2 Recurrence Pattern Section

The options in this section are enabled if you are editing the selected provider’s recurring non-clinic schedule.

The options in this section are disabled if you are editing the selected provider’s non-clinic time for one session within a recurring session.

Use this section to edit recurrence schedules for the selected provider’s non-clinic time.

EDIT PROVIDER NON-CLINIC TIMES WINDOW - RECURRANCE PATTERN SECTION

Recur every __ week(s) / month(s)

This field is enabled if the Is a recurring item option is selected.

This field indicates the recurrence pattern of the cycle indicated using the Weekly option or Monthly option.

If you selected the Weekly option, this field displays Recur every __ week(s). If this field displays an entry greater than 1, the Starting on field and the Ending on field is enabled.

If you selected the Monthly option, this field displays Recur every __ month(s). If this field displays an entry greater than 1, the Starting on field and the Ending on field is enabled.
## Edit Provider Non-Clinic Times Window - Recurrance Pattern Section

**Starting on**
This field is enabled if the *Is a recurring item* option is selected, and the *Recur every __ week(s)* field or the *Recur every __ month(s)* field displays an entry greater than 1.

This field indicates the start date that this cycle begins. The date entered here is also automatically displayed in the *Ending on* date in the Recurrance pattern section as a disabled field.

<table>
<thead>
<tr>
<th>Ending on</th>
<th>This field is enabled if the <em>Is a recurring item</em> option is selected, and the <em>Recur every __ week(s)</em> field or the <em>Recur every __ month(s)</em> field displays an entry greater than 1. By default, this field is the same date entered in the <em>Date</em> field.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This field indicates the start date that this cycle ends.</td>
</tr>
</tbody>
</table>

**On the**
This field is displayed if the *Monthly* option is selected.

This field displays the recurring start week of the month, and displays the following options:

- **First**: The recurrence starts on the first week of the month.
- **Second**: The recurrence starts on the second week of the month.
- **Third**: The recurrence starts on the third week of the month.
- **Fourth**: The recurrence starts on the fourth week of the month.
- **Last**: The recurrence starts on the last week of the month.

**Monday - Sunday**
This field is enabled if the *Is a recurring item* option is selected.

These checkboxes, if selected, indicates the schedule applies to these days of the week, and displays the following checkboxes:

- **Monday**: The provider time-off schedule applies to Mondays.
- **Tuesday**: The provider time-off schedule applies to Tuesdays.
- **Wednesday**: The provider time-off schedule applies to Wednesdays.
- **Thursday**: The provider time-off schedule applies to Thursdays.
- **Friday**: The provider time-off schedule applies to Fridays.
- **Saturday**: The provider time-off schedule applies to Saturdays.
- **Sunday**: The provider time-off schedule applies to Sundays.

**Select All**
This button is enabled if the *Is a recurring item* option is selected.

Clicking this button selects all the days checkboxes (*Monday - Sunday*).

**Clear All**
This button is enabled if the *Is a recurring item* option is selected.

Clicking this button clears all the days checkboxes (*Monday - Sunday*).
28 Edit Wait List Details Window

You can access this window by going to the Appointment Lists window’s Wait List tab, highlighting a record from the list view, and selecting the Edit Wait List Details right-click option. For information on the Appointment Lists window’s Wait List tab, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

Use this window to edit a patient’s appointment wait record.

**EDIT WAIT LIST DETAILS WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This disabled field indicates the highlighted appointment's patient title, last name, first name, and chart number.</td>
</tr>
<tr>
<td>Clinic</td>
<td>This drop-down field displays the clinic needed for this waiting appointment. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
<tr>
<td>Reason</td>
<td>This drop-down field indicates the reason for placing the patient on the waiting list. The options in this drop-down field are defined in the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 816.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field is for internal purposes and indicates a numeric ranking of an appointment's importance that can be used to make cancellation decisions when chairs are limited. This field defaults to the value indicated in the Default Priority field of the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 816.</td>
</tr>
<tr>
<td>Note</td>
<td>This text box displays a detailed description of the reason for the patient being placed on the waiting list.</td>
</tr>
<tr>
<td>Days Waiting</td>
<td>This disabled field indicates the number of days this patient has been waiting to book this appointment.</td>
</tr>
<tr>
<td>Availability</td>
<td>Clicking this button opens the Patient Availability window. For information on the Patient Availability window, see Patient Availability Window on page 103.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the entries and closes the Edit Wait List Details window.</td>
</tr>
</tbody>
</table>
**EDIT WAIT LIST DETAILS WINDOW**

<table>
<thead>
<tr>
<th>Cancel</th>
<th>Clicking this button cancels any entries and closes the Edit Wait List Details window.</th>
</tr>
</thead>
<tbody>
<tr>
<td>History</td>
<td>Clicking this button opens the Wait List History window. For information on the Wait List History window, see Wait List History Window on page 150.</td>
</tr>
</tbody>
</table>

### 29 Failed Appointment Window

You can access this window by:

- Going to the Scheduler window’s Active tab, selecting a booked appointment block, and selecting the Fail right-click option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.

- Going to the Appointment Lists window’s Appointments tab, highlighting a record from the list view, and selecting the Fail right-click option. For information on the Appointment Lists window’s Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.

- Going to the Appointment Lists window’s Wait List tab, highlighting a record from the list view, and selecting the Fail right-click option. For information on the Appointment Lists window’s Wait List tab, see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

This window works in conjunction with the Clinics window’s Charge for Failed Appt. drop-down field. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.

Use this window to indicate a failed appointment reason.

![Failed Appointment Window](image)

**FAILED APPOINTMENT WINDOW**

<table>
<thead>
<tr>
<th>Reason</th>
<th>This drop-down field indicates the reason for the academic cancellation.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Missed Appointment Codes window. For information on the Missed Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see Missed Appointment Codes Window on page 731.</td>
</tr>
</tbody>
</table>
Family Appointments Window

30 Family Appointments Window

The Mode drop-down field must display the Family option in the Scheduler Options window’s Patient/Family Appointments Window section. For information on the Scheduler Options window’s Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804.

You can access the Family Appointments window by:

- Going to the Rolodex (Select Patient) window, selecting a patient, and clicking the Make New button. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.
- Going to the Scheduler window’s Active tab, highlighting a booked appointment or a hovering appointment block and selecting the Family Appointments right-click option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.
- Going to the Scheduler window’s Pending tab, highlighting a record from the list view, and
selecting the Family Appointments right-click option. For information on the Scheduler window’s Pending tab, see *Scheduler Window - Pending Tab* on page 138.

- Going to the Patient Card window’s appointment tools section, and double-click on a line in the list view. For information on the sections of the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Appointment History Area* on page 63.

- Going to the Patient Card window’s Patient Card tools section, and clicking (Patient Appointments). For information on the sections of the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Patient Card Window* on page 55.

Use this window to view or make appointments for the selected patient and their family members. This lets you co-ordinate their appointments in a way that is most convenient for the family (e.g. they all have the same appointment time, or consecutive appointments with the same provider).

**FAMILY APPOINTMENTS WINDOW**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Scheduled</td>
<td>This option, if selected, indicates to display only unscheduled appointments in the list view. Unscheduled appointments are those appointments of type <em>Request (Del)</em>, <em>Requested</em>, <em>Planned</em>, and <em>Rescheduled</em>.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>This option, if selected, indicates to display only scheduled appointments in the list view. Scheduled appointments are those appointments of type <em>Active</em>, <em>Checked In</em>, or <em>Checked Out</em>.</td>
</tr>
<tr>
<td>All</td>
<td>This option, if selected, indicates to display both unscheduled and scheduled appointments in the list view.</td>
</tr>
</tbody>
</table>
### FAMILY APPOINTMENTS WINDOW

**Family**  
This list view displays the following:

- Currently selected patient.
- Any primary or secondary guarantors of the selected patient.
- Any patients the selected patient is a primary or secondary guarantor of.
- Any patients that are dependents of any of the selected patient’s primary or secondary guarantors.

**Select Patient**  
This right-click option in the Family list view makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar.

**Patient Info...**  
This right-click option in the Family list view opens the Patient Info window while the Family Appointments window remains displayed. For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window on page 70.

**Patient Card...**  
This right-click option in the Family list view closes the Family Appointments window and opens the Patient Card window.

For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

**Select All**  
Clicking this button selects all family members from the Family list box.

**Patient Information**  
This section displays the contact information of the patient highlighted in the Family section, as entered in the Patient Info window’s Personal tab.

For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window - Personal Tab on page 72.

**Providers**  
This section displays the primary provider and primary hygienists for the patient highlighted in the Family section, as entered in the Patient Info window’s Personal tab’s Assignment section.

For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Assignment Section on page 78.

**Show Past**  
This checkbox, if selected, indicates to display past appointments.

**GoTo**  
This button is enabled if the highlighted item in the list view is a scheduled appointment. Clicking this button will take you to the appointment.

- If the highlighted item is a pending appointment, axiUm takes you to the Scheduler window’s Pending tab.
- If the highlighted item is an active appointment, axiUm takes you to the Scheduler window’s Active tab.
**FAMILY APPOINTMENTS WINDOW**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Make New...</strong></td>
<td>If the Family list box displays more than one patient name, clicking this button opens the Select a Patient window. For information on the Select a Patient window, see <em>Select a Patient Window</em> on page 147. After selecting a patient name, axiUm displays the New Appointment window. If the family list box displays only one patient name, clicking this button opens the New Appointment window. For information on the New Appointment window, see <em>New Appointment Window</em> on page 88.</td>
</tr>
<tr>
<td><strong>New Planned...</strong></td>
<td>If the Family list box displays more than one patient name, clicking this button opens the Select a Patient window. For information on the Select a Patient window, see <em>Select a Patient Window</em> on page 147. After selecting a patient name, axiUm displays the New Planned Appointment window. If the family list box displays only one patient name, clicking this button opens the New Planned Appointment window. For information on the New Planned Appointment window, see <em>New Planned Appointment Window</em> on page 95.</td>
</tr>
<tr>
<td><strong>Edit...</strong></td>
<td>This button is enabled if the highlighted item is an appointment of type <em>Active, Checked In, Checked Out, or Pending (Wait)</em>. Clicking this button opens the Edit Appointment window. For information on the Edit Appointment window, see <em>Edit Appointment Window</em> on page 59.</td>
</tr>
<tr>
<td><strong>Delete...</strong></td>
<td>This button is enabled if the highlighted item is an appointment of type <em>Active, Checked In, Checked Out, or Pending (Wait)</em>. Clicking this button changes the highlighted item to appointment type <em>Deleted</em>.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>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. Clicking this button opens the Cancellation window. For information on the Cancellation window, see <em>Cancellation Window</em> on page 54.</td>
</tr>
</tbody>
</table>
FAMILY APPOINTMENTS WINDOW

Schedule

This button is displayed if the highlighted item is of type Requested, Planned, Pending, Ortho, Failed, or Cancelled. Of these appointment types, the ones that enable this button are Requested, Planned, Pending (Wait).

Clicking this button does one of the following:

• If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm books the appointment.

• If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm changes the highlighted item in the list view to a hovering appointment block.

For information on the Appointment Expert Options window’s Appointments section, see Appointments Section on page 23.

If the highlighted item is an appointment of type Planned, and the Not Before Date in the associated New Planned Appointment window or Edit Planned Appointment window shows a date, clicking this button opens the Scheduler window’s Active tab to this date.

For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.

For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69.

Reschedule

This button is available if the highlighted item is of type Active, Checked In, Checked Out, Failed, Cancelled, Deleted, and Rescheduled. Of these appointment types, the ones that enable this button are Active, Failed, Cancelled, and Deleted.

Clicking this button changes the highlighted item in the list view to a hovering appointment block.

Sch. w/Expert

This button is enabled if the highlighted item is of type Requested, Pending (Wait), or Rescheduled.

Clicking this button opens the Appointment Expert window (in regular mode). If the highlighted item is an appointment of type Planned, and the Not Before Date in the associated New Planned Appointment window or Edit Planned Appointment window shows a date, clicking this button opens the Appointment Expert window (in regular mode), with the From field displaying the same date. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.

For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.

For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69.

Undo

This button is enabled if the highlighted item is of type Cancelled or Failed.

Clicking this button will reverse the last action made to the highlighted item.

History

Clicking this button opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25.
31 Make Unavailable Window

You can access this window by going to the Scheduler window’s Chair tab, and on a chair, selecting the Make Unavailable right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

Use this to make chairs unavailable. For example, the chair requires maintenance.

Make Unavailable Window

Unavailable Details

From 09:00 AM
To 12:00 PM
Display Desc.
All chairs in the clinic

Unavailable Period

Apply to multiple dates
Repeat Every week(s)
Starting On
Ending On

OK
Cancel

MAKE UNAVAILABLE WINDOW

OK
Cancel

Clicking this button saves the entries and closes the Make Unavailable window.

Clicking this button cancels any entries and closes the Make Unavailable window.
31.1 Unavailable Details Section

Use this section to define the selected chair’s unavailable times.

<table>
<thead>
<tr>
<th>Unavailable Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>From 18:00 AM</td>
</tr>
<tr>
<td>To 12:00 PM</td>
</tr>
<tr>
<td>Display Desc.</td>
</tr>
<tr>
<td>All chairs in the clinic</td>
</tr>
</tbody>
</table>

**MAKE UNAVAILABLE WINDOW - UNAVAILABLE DETAILS SECTION**

- **From**
  - This field indicates the time from which the selected chair is unavailable.

- **To**
  - This field indicates the time in which the selected chair becomes available again.

- **Display Desc.**
  - This field indicates the unavailable reason.
  - Clicking (ellipsis) opens the Closure Reasons window. For information on the Closure Reasons window, refer to the axiUm Reference Manual for Maintenance and see Closure Reasons Window on page 700.

- **All chairs in the clinic**
  - Makes all unreserved chairs in the clinic unavailable.

31.2 Unavailable Period Section

Use this section to create recurring schedules for the selected chair’s unavailable times.

<table>
<thead>
<tr>
<th>Unavailable Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply to multiple dates</td>
</tr>
<tr>
<td>Days</td>
</tr>
<tr>
<td>Starting On</td>
</tr>
<tr>
<td>Ending On</td>
</tr>
</tbody>
</table>

**MAKE UNAVAILABLE WINDOW - UNAVAILABLE PERIOD SECTION**

- **Apply to multiple dates**
  - This checkbox, if selected, indicates that the chairs are unavailable over multiple dates.
  - Selecting this checkbox enables all the fields and options in this section.

- **Recur Every ___ week(s)**
  - This field is enabled if the Apply to multiple dates checkbox is selected.
  - This field indicates the recurrence pattern of this cycle.
You can access this window by:

- Going to the Cancellation window and clicking the OK button. For information on the Cancellation window, see *Cancellation Window* on page 54.
- Going to the Failed Appointment window and clicking the OK button. For information on the Failed Appointment window, see *Failed Appointment Window* on page 78.

Use this window to enter charges for missed appointments.

### 32 Missed Appointment Charge Window

#### MAKE UNAVAILABLE WINDOW - UNAVAILABLE PERIOD SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting On</td>
<td>This field is enabled if the <em>Apply to multiple dates</em> checkbox is selected. This field indicates the date in which the recurrence pattern for this cycle starts.</td>
</tr>
<tr>
<td>Ending On</td>
<td>This field is enabled if the <em>Apply to multiple dates</em> checkbox is selected. This field indicates the date in which the recurrence pattern for this cycle ends.</td>
</tr>
<tr>
<td>Monday - Sunday</td>
<td>These checkboxes are enabled if the <em>Apply to multiple dates</em> checkbox is selected. Select the checkbox next to the day of the week that the selected chair is to be unavailable in this recurrence pattern.</td>
</tr>
</tbody>
</table>

#### MISSED APPOINTMENT CHARGE WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice</td>
<td>This drop-down field indicates the practice in which the cancellation charges will be forwarded. The options in this drop-down field are defined in the <em>Practices</em> window. For information on the <em>Practices</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Practices Window</em> on page 432.</td>
</tr>
<tr>
<td>Date</td>
<td>This field indicates the date on which the cancellation charges occurred.</td>
</tr>
</tbody>
</table>
**Missed Appointment Charge Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td>This field indicates the default office charge code for the selected missed appointment reason. Clicking (ellipsis) opens the Office Charge Codes window to select from. For information on the Office Charge Codes window, refer to the axiUm Reference Manual for Maintenance and see Office Charge Codes Window on page 917.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>This field indicates the description for the office charge code selected in the Code field. You can edit the text.</td>
</tr>
<tr>
<td><strong>[custom field]</strong></td>
<td>This drop-down field is a custom field. These drop-down field are created in the Custom Fields window. For information on the Custom Fields window, refer to the axiUm Reference Manual for Maintenance and see Custom Fields Window on page 9. The options in this custom drop-down fields are created in the Custom Codes window. For information on the Custom Codes window, refer to the axiUm Reference Manual for Maintenance and see Custom Codes Window on page 7.</td>
</tr>
<tr>
<td><strong>Provider</strong></td>
<td>This field displays the provider number of the provider that the appointment was assigned. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td><strong>Amount</strong></td>
<td>This field indicates the default amount of the office charge code, as defined in the Amount field of the Office Charge Codes window. For information on the Office Charge Codes window, refer to the axiUm Reference Manual for Maintenance and see Office Charge Codes Window on page 917.</td>
</tr>
<tr>
<td><strong>Discipline</strong></td>
<td>This drop-down field indicates the discipline associated to the cancelled appointment. The options in this drop-down field are defined in the Treatment Disciplines window. For information on the Treatment Disciplines window, refer to the Treatment Disciplines Window on page 87.</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>Clicking this button saves the entries and closes the Missed Appointment Charge window.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Clicking this button cancels the entries and closes the Missed Appointment Charge window.</td>
</tr>
</tbody>
</table>
33 New Appointment Window

You can access this window by:

- Going to the Patient Appointments window and clicking the Make New button. For information on the Patient Appointments window, see Patient Appointments Window on page 100.
- Going to the Family Appointments window and clicking the Make New button. For information on the Family Appointments window, see Family Appointments Window on page 79.

Use this window to create a new appointment.

NEW APPOINTMENT WINDOW

Reason

This text box displays a short description (maximum 200 characters) of the reason for the appointment.

axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window's Appointment Code section. For information on the Appointment Code window's Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Section on page 651.

Provider Time (Minutes)

This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This section indicates to change the appointment duration using the total time required by the providers and assistants. For each new appointment, you can enter up to three provider times (using the Provider field) and three assistant times (using the Other fields).

Accept

Clicking this button saves the entries and closes the New Appointment window.
NEW APPOINTMENT WINDOW

**Cancel**
Clicking this button cancels any entries and closes the *New Appointment* window.

**Add'l Providers**
Clicking this button opens the *Appointment Additional Providers* window. For information on the *Appointment Additional Providers* window, see *Appointment Additional Providers Window* on page 11.

**Tx. Plan...**
Clicking this button opens the *Appointment Treatments* window. For information on the *Appointment Treatments* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Appointment Treatments Window* on page 8.

**Recalls...**
Clicking this button opens the *Patient Recalls* window. For information on the *Patient Recalls* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Patient Recalls Window* on page 120.

**Check in**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the *Advanced* option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This button is enabled in the *Edit Appointment* window. For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

**Check out...**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the *Advanced* option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This button is enabled in the *Edit Appointment* window. For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

**Reschedule**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the *Advanced* option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This button is enabled in the *Edit Appointment* window. For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

**Failed**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the *Advanced* option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This button is enabled in the *Edit Appointment* window. For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

**Cancelled**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the *Advanced* option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see *Appt Entry Window Section* on page 804.

This button is enabled in the *Edit Appointment* window. For information on the *Edit Appointment* window, see *Edit Appointment Window* on page 59.

**Notes...**
Clicking this button opens the *Appointment Notes* window. For information on the *Appointment Notes* window, see *Appointment Notes Window* on page 40.
33.1 Patient Section

Use this section to view patient information on the selected appointment.

<table>
<thead>
<tr>
<th>[name]</th>
<th>This static field displays the patient's title, last name, first name, and chart number, as entered in the Patient Info window's Personal tab's Name section. For information on the Patient Info window's Personal tab's Name section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Name Section on page 72.</th>
</tr>
</thead>
<tbody>
<tr>
<td>[address]</td>
<td>This static field displays the patient's address, as entered in the Patient Info window's Personal tab's Home Address section. For information on the Patient Info window's Personal tab's Home Address section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Home Address Section on page 74.</td>
</tr>
<tr>
<td>Home</td>
<td>These static fields display the patient's home number, work number, and alternative number, as entered in the Patient Info window's Personal tab's Telephone section. For information on the Patient Info window's Personal tab's Telephone section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Telephone Section on page 75.</td>
</tr>
<tr>
<td>Work</td>
<td>Faculty: This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.</td>
</tr>
<tr>
<td>Other</td>
<td>This disabled field displays the last name and first name of the faculty member, as entered in the Patient Info window's Personal tab's Assignment section, but only if the assigned faculty is from a discipline of type Ortho, as entered in the Discipline drop-down field of the Faculty Assignments window. For information on the Patient Info window's Personal tab's Assignment section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Assignment Section on page 78.</td>
</tr>
<tr>
<td></td>
<td>For information on the Faculty Assignments window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Faculty Assignments Window on page 31.</td>
</tr>
</tbody>
</table>
### 33.2 Appointment Section

Use this section to enter details for the selected appointment.

![New Appointment Window - Appointment Section](image)

**NEW APPOINTMENT WINDOW - APPOINTMENT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Ortho Stage</td>
<td>This checkbox available if the Ortho option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This checkbox, if selected, indicates this appointment satisfies a specific stage of ortho care. Selecting this checkbox disables the Appt. Code drop-down field and displays the Stage drop-down field. Deselecting this checkbox hides the Stage drop-down field and the Minutes field. It also automatically enters the default reason in the Reason text box. You can deselect this checkbox to book a regular (i.e., non-ortho) appointment.</td>
</tr>
<tr>
<td>Provider</td>
<td>This field indicates the provider number of the provider treating the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td>2nd Provider</td>
<td>This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
</tbody>
</table>
NEW APPOINTMENT WINDOW - APPOINTMENT SECTION

Sched. 2nd For  This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment.

This drop-down field displays the following options:

• Other Time: If this provider is booked as a second provider, they will be defaulted to an assistant's time.

• Provider Time: If this provider is booked as a second provider, they will be defaulted to a provider’s time.

• Total Time: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment.

Appt. Code  This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is deselected.

This drop-down field is disabled and set to the default ortho appointment code if the Is Ortho Stage Appointment checkbox is deselected. The default ortho appointment code is defined in the Ortho Appointment Code drop-down field of the Practice Options window's Ortho Settings section. For information on the Practice Options window's Ortho Settings section, refer to the axiUm Reference Manual for Maintenance and see Ortho Settings Section on page 443.

This drop-down field indicates the appointment code for the appointment you are booking.

The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.

Stage  This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is selected.

This drop-down field indicates the ortho stage for the appointment you are booking.

The options in this drop-down field are defined in the Stage Codes window. For information on the Stage Codes window, refer to the axiUm Reference Manual for Maintenance and see Stage Codes Window on page 547.
**NEW APPOINTMENT WINDOW - APPOINTMENT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tx Discipline</strong></td>
<td>This drop-down field indicates the discipline under which the appointment treatment belongs.</td>
</tr>
<tr>
<td></td>
<td>This drop-down field defaults to the discipline associated with the appointment code displayed in the Appt. Code drop-down field.</td>
</tr>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Treatment Discipline window. For information on the Treatment Discipline window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 87.</td>
</tr>
<tr>
<td></td>
<td>If the Is Ortho Stage Appointment checkbox is selected, this drop-down field is limited to displaying only ortho-type disciplines.</td>
</tr>
<tr>
<td><strong>Appt. Status</strong></td>
<td>This drop-down field indicates the status of the appointment you are booking.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Rank</strong></td>
<td>This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.</td>
</tr>
<tr>
<td></td>
<td>This field is for internal purposes and indicates a numeric ranking of an appointment's importance that can be used to make cancellation decisions when chairs are limited.</td>
</tr>
<tr>
<td><strong>Recall</strong></td>
<td>This checkbox, if selected, indicates that this appointment is a recall appointment to a treatment follow-up.</td>
</tr>
<tr>
<td></td>
<td>If the Appt. Code drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox.</td>
</tr>
<tr>
<td></td>
<td>The drop-down field indicates the type of recall appointment you want to make for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank.</td>
</tr>
</tbody>
</table>

### 33.3 Pt Information Section

Use this section to enter other patient information for the selected appointment.
NEW APPOINTMENT WINDOW - PT INFORMATION SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pt Status</td>
<td>This static field displays the patient's status, as entered in the Status drop-down field of the Patient Info window's Personal tab's Personal section. For information on the Personal tab's Personal section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Personal Section on page 73.</td>
</tr>
<tr>
<td>Time</td>
<td>This static field indicates the best time to contact the patient, as entered in the Time field of the Patient Info window's Personal tab's Contact section. For information on the Personal tab's Contact section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Contact Section on page 76.</td>
</tr>
<tr>
<td>Pref. Time</td>
<td>This field indicates the best time to schedule an appointment for this patient, as entered in the Pref. Appt field of the Patient Info window's Codes tab's Additional section. For information on the Codes tab's Additional section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Additional Section on page 79.</td>
</tr>
<tr>
<td>Patient Due</td>
<td>This disabled displays the total amount the patient owes to date.</td>
</tr>
<tr>
<td>Estimate $</td>
<td>This field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This field indicates the estimate for this appointment treatment.</td>
</tr>
<tr>
<td>Tx Plan Total</td>
<td>This disabled field displays the total amount of the treatment plan.</td>
</tr>
</tbody>
</table>

33.4 Appt Details Section

Use this section to enter other appointment details for the selected appointment.

NEW APPOINTMENT WINDOW - APPT DETAILS SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>This static field displays the time of the appointment.</td>
</tr>
<tr>
<td>Minutes</td>
<td>This field is calculated in conjunction with the Appt. Code drop-down field.</td>
</tr>
<tr>
<td></td>
<td>This field is enabled if the Is Ortho Stage Appointment checkbox is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the number of minutes required for this ortho appointment you are booking.</td>
</tr>
</tbody>
</table>
**NEW APPOINTMENT WINDOW - APPT DETAILS SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
<td>This static field is used in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td>Made on</td>
<td>This static field displays the date that the appointment was booked, and default to today's date.</td>
</tr>
<tr>
<td>Last user</td>
<td>This static field is used in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td>Sooner if possible</td>
<td>This checkbox, if selected, indicates that the patient wants to come in sooner than scheduled, if there is an earlier opening due to a cancellation. This can be used to generate reports of people that are willing to come in earlier that can be sued by staff to create short notice appointments.</td>
</tr>
<tr>
<td>Short Notice</td>
<td>This checkbox, if selected, indicates that the patient can be bumped up if there's an earlier opening, due to cancellation; not necessarily because the patient asked for it but because the institution allows it for the selected appointment.</td>
</tr>
<tr>
<td>Confirm</td>
<td>This button is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUrn Reference Manual for Maintenance and see Appt Entry Window Section on page 804. Clicking this button indicates patient confirmation and changes the field display from NOT CONFIRMED to CONFIRMED.</td>
</tr>
</tbody>
</table>

### 34 New Planned Appointment Window

You can access this window by:

- Going to the Patient Appointments window and clicking the New Planned button. For information on the Patient Appointments window, see Patient Appointments Window on page 100.
- Going to the Family Appointments window and clicking the New Planned button. For information on the Family Appointments window, see Family Appointments Window on page 79.
- Going to the Appointment Planning window and clicking the New Appt button. For information on the Appointment Planning window, see Appointment Planning Window on page 42.

Use this window to create planned appointments (e.g. when a student selects the appointment dates but haven’t booked the appointment), and also to apply rules and conditions to planned appointments.
NEW PLANNED APPOINTMENT WINDOW

[name]  This static field displays the patient's title, last name, first name, and chart number, as entered in the Patient Info window's Personal tab's Name section. For information on the Patient Info window's Personal tab's Name section, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Name Section on page 72.

Provider  This field indicates the provider number of the provider treating the patient at this planned appointment.

Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.

2nd Provider  This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this planned appointment.

Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.
<table>
<thead>
<tr>
<th><strong>NEW PLANNED APPOINTMENT WINDOW</strong></th>
<th></th>
</tr>
</thead>
</table>
| **Sched. 2nd For**               | This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.  
This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment.  
This drop-down field displays the following options:  
  - **Other Time**: If this provider is booked as a second provider, they will be defaulted to an assistant’s time.  
  - **Provider Time**: If this provider is booked as a second provider, they will be defaulted to a provider’s time.  
  - **Total Time**: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment. |
| **Appt. Code**                   | This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is deselected.  
This drop-down field is disabled and set to the default ortho appointment code if the Is Ortho Stage Appointment checkbox is deselected. The default ortho appointment code is defined in the Ortho Appointment Code drop-down field of the Practice Options window’s Ortho Settings section. For information on the Practice Options window’s Ortho Settings section, refer to the axiUm Reference Manual for Maintenance and see Ortho Settings Section on page 443.  
This drop-down field indicates the appointment code for the appointment you are planning.  
The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649. |
| **Tx Discipline**                | This drop-down field indicates the discipline under which the planned appointment treatment belongs.  
This drop-down field defaults to the discipline associated with the appointment code displayed in the Appt. Code drop-down field.  
The options in this drop-down field are defined in the Treatment Discipline window. For information on the Treatment Discipline window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 87. |
| **Appt. Status**                 | This drop-down field indicates the status of the appointment you are planning.  
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. |
**NEW PLANNED APPOINTMENT Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td>This drop-down field indicates the clinic you want for this planned appointment. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see <strong>Clinics Window</strong> on page 693.</td>
</tr>
<tr>
<td>Instructor</td>
<td>This field indicates the last name and first name of the instructor used in the search criteria. During the search process, axiUm considers the selected instructor’s availability based on their schedule defined in the Instructor Working Schedules window. For information on the Instructor Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see <strong>Instructor Working Schedules Window</strong> on page 710. 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 <strong>Instructor List Window</strong> on page 35.</td>
</tr>
<tr>
<td>Not Before</td>
<td>This field indicates that this appointment is planned for a date no earlier than the date displayed in this field.</td>
</tr>
<tr>
<td>Recall</td>
<td>This checkbox, if selected, indicates that this appointment is a planned recall appointment to a treatment follow-up. If the Appt. Code drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox. The drop-down field indicates the type of recall appointment you want to plan for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank.</td>
</tr>
<tr>
<td>Reason</td>
<td>This text box displays a short description of the reason for the planned appointment. axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window’s Appointment Code section. For information on the Appointment Code window’s Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see <strong>Appointment Code Section</strong> on page 651.</td>
</tr>
<tr>
<td>Tx Plan Total</td>
<td>This field is available if the Scheduler Options window’s Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see <strong>Appt Entry Window Section</strong> on page 804. This disabled field displays the total amount of the ortho treatment plan.</td>
</tr>
<tr>
<td>Note</td>
<td>This text box displays a detailed description of the reason for the planned appointment.</td>
</tr>
<tr>
<td>Alert Staff</td>
<td>This checkbox, if selected, indicates to alert the staff of the appointment request. Selecting this checkbox displays the appointment request in the Personal Planner module’s Appointments tab’s list view. For information on the Personal Planner module’s Appointments tab, refer to the axiUm Reference Manual for Personal Planner and see <strong>Personal Planner Window - Appointments Tab</strong> on page 5.</td>
</tr>
</tbody>
</table>
**NEW PLANNED APPOINTMENT WINDOW**

**Alert Provider**
This checkbox, if selected, indicates to alert the provider of the appointment request.

Selecting this checkbox displays the appointment request in the Personal Planner module’s Appointments tab’s list view. Both the main provider and the second provider are alerted. For information on the Personal Planner module’s Appointments tab, refer to the axiUm Reference Manual for Personal Planner and see Personal Planner Window - Appointments Tab on page 5.

**Patient Due**
This disabled displays the total amount the patient owes to date.

**Estimate**
This field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This field indicates the estimate for this appointment treatment.

**Appt Total**
This field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This disabled field displays the total amount of the treatment in this planned appointment.

**Provider Time (Minutes)**
This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This section indicates to change the appointment duration using the total time required by the providers and assistants. For each new appointment, you can enter up to three provider times (using the Provider field) and three assistant times (using the Other fields).

**Accept**
Clicking this button saves the entries and closes the New Appointment window.

**Cancel**
Clicking this button cancels any entries and closes the New Appointment window.

**Add'l Providers**
Clicking this button opens the Appointment Additional Providers window. For information on the Appointment Additional Providers window, see Appointment Additional Providers Window on page 11.

**Tx Plan...**
Clicking this button opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8.

**Recalls...**
Clicking this button opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 120.

**Clear Note**
Clicking this button clears any unsaved entries in the Note text box.

**Add Note**
Clicking this button saves the entries in the Note text box and displays it in the list view.

**Delete Note**
Clicking this button deletes the highlighted note from the list view.
35 Patient Appointments Window

The Mode drop-down field must display the Patient option in the Scheduler Options window’s Patient/Family Appointments Window section. For information on the Scheduler Options window’s Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804.

You can access this window by:

- Going to the Rolodex (Select Patient) window, selecting a patient, and clicking the Make New button. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.

- Going to the Scheduler window’s Active tab, highlighting a booked appointment or a hovering appointment block and selecting the Patient Appointments right-click option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.

- Going to the Scheduler window’s Pending tab, highlighting a record from the list view, and selecting the Patient Appointments right-click option. For information on the Scheduler window’s Pending tab, see Scheduler Window - Pending Tab on page 138.

- Going to the Patient Card window’s appointment tools section and double-click on a line in the list view. For information on the sections of the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment History Area on page 63.

- Going to the Patient Card window’s Patient Card tools section, click (Patient Appointments). For information on the sections of the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

Use this window to view a patient’s appointments.
PATIENT APPOINTMENTS WINDOW

Not Scheduled
This option, if selected, indicates to display only unscheduled appointments in the list view. Unscheduled appointments are those appointments of type Request (Del), Requested, Planned, and Rescheduled.

Scheduled
This option, if selected, indicates to display only scheduled appointments in the list view. Scheduled appointments are those appointments of type Active, Checked In, or Checked Out.

All
This option, if selected, indicates to display both unscheduled and scheduled appointments in the list view.

Show Past
This checkbox, if selected, indicates to display past appointments.

GoTo
This button is enabled if the highlighted item in the list view is a scheduled appointment. Clicking this button will take you to the appointment.

- If the highlighted item is a pending appointment, axiUm takes you to the Scheduler window’s Pending tab.
- If the highlighted item is an active appointment, axiUm takes you to the Scheduler window’s Active tab.

Make New...
Clicking this button opens the New Appointment window. For information on the New Appointment window, see New Appointment Window on page 88.

New Planned...
Clicking this button opens the New Planned Appointment window. For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.
### Patient Appointments Window

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Enabled Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit...</strong></td>
<td>This button is enabled if the highlighted item is an appointment of type Active, Checked In, Checked Out, or Pending(Wait). Clicking this button opens the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
<td></td>
</tr>
<tr>
<td><strong>Delete...</strong></td>
<td>This button is enabled if the highlighted item is an appointment of type Active, Checked In, Checked Out, or Pending(Wait). Clicking this button changes the highlighted item to appointment type Deleted.</td>
<td></td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>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. Clicking this button opens the Cancellation window. For information on the Cancellation window, see Cancellation Window on page 54.</td>
<td></td>
</tr>
<tr>
<td><strong>Undo</strong></td>
<td>This button is enabled if the highlighted item is of type Cancelled or Failed. Clicking this button will reverse the last action made to the highlighted item.</td>
<td></td>
</tr>
</tbody>
</table>
| **Schedule** | This button is displayed if the highlighted item is of type Request(Del), Requested, Ortho(Del), Planned, Pending(Wait), Failed, or Cancelled. Of these appointment types, the ones that enable this button are Requested, Planned, Pending(Wait). Clicking this button does one of the following:  
  - If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm books the appointment.  
  - If the ‘Make Appt’ button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm changes the highlighted item in the list view to a hovering appointment block.  
For information on the Appointment Expert Options window’s Appointments section, see Appointments Section on page 23.  
If the highlighted item is an appointment of type Planned, and the Not Before Date in the associated New Planned Appointment window or Edit Planned Appointment window shows a date, clicking this button opens the Scheduler window’s Active tab to this date.  
For information on the New Planned Appointment window, see New Planned Appointment Window on page 95.  
For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69. |
| **Reschedule** | This button is available if the highlighted item is of type Active, Checked In, Checked Out, Failed, Cancelled, Deleted, and Rescheduled. Of these appointment types, the ones that enable this button are Active, Failed, Cancelled, and Deleted. Clicking this button changes the highlighted item in the list view to a hovering appointment block. |
**PATIENT APPOINTMENTS WINDOW**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sch. w/Expert</td>
<td>This button is enabled if the highlighted item is of type Requested, Pending(Wait), or Rescheduled. Clicking this button opens the Appointment Expert window (in regular mode). If the highlighted item is an appointment of type Planned, and the Not Before Date in the associated New Planned Appointment window or Edit Planned Appointment window shows a date, clicking this button opens the Appointment Expert window (in regular mode), with the From field displaying the same date. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12. For information on the New Planned Appointment window, see New Planned Appointment Window on page 95. For information on the Edit Planned Appointment window, see Edit Planned Appointment Window on page 69.</td>
</tr>
<tr>
<td>History</td>
<td>Clicking this button opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25.</td>
</tr>
<tr>
<td>Add to Wait List</td>
<td>This button is enabled if the highlighted item is of type Active or Planned. Clicking this button opens the Add to Wait List window. For information on the Add to Wait List window, see Add to Wait List Window on page 6.</td>
</tr>
<tr>
<td>Recalls</td>
<td>Clicking this button opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Recalls Window on page 120.</td>
</tr>
<tr>
<td>Planning</td>
<td>Clicking the Planning button displays the Appointment Planning window. For information on the Appointment Planning window, see Appointment Planning Window on page 42.</td>
</tr>
<tr>
<td>Close</td>
<td>Clicking this button closes the Patient Appointments window.</td>
</tr>
</tbody>
</table>

**36 Patient Availability Window**

You can access this window by going to the Add to Wait List window and clicking the Availability button. For information on the Add to Wait List window, see Add to Wait List Window on page 6.

Use this window to define a patient’s availability.
PATIENT AVAILABILITY WINDOW

**Patient**
This disabled field indicates the last name, first name, and chart number of the selected patient.

**[time blocks]**
The green time blocks indicates the times when the patient is available for appointments. Clicking the blocks changes it from green (available) to white (unavailable).

**Patient requires ___ Days/Hours notice for scheduling appointments**
This field indicates the number of hours or days of notice that the selected patient requires before an appointment. The drop-down field indicates the duration of the value indicated in the above field. This drop-down field displays the following options:

- **Hours**: The previous field indicates the number of hours of notice the selected patient requires.
- **Days**: The previous field indicates the number of days of notice the selected patient requires.

**OK**
Clicking this button saves the entries and closes the Patient Availability window.

**Cancel**
Clicking this button cancels the entries and closes the Patient Availability window.

**Reset**
Clicking this button reverts the selected time blocks to its original display.

37 Patient Contact Information Window

You can access this window by clicking the Info button on the Appointment Expert window in regular mode. For information on the Appointment Expert window in regular mode, see Appointment Expert Window (Regular Mode) on page 12.
Use this window to view information about the patient selected in the Appointment Expert window (in regular mode).

**PATIENT CONTACT INFORMATION WINDOW**

Clicking this button closes the Patient Contact Information window.

### 38 Print Appointment List Window

You can access this window by going to the Scheduler window and clicking (Print List). For information on the Scheduler window, see *Scheduler Window* on page 121.

Use this window to define your print setup for the Appointment List report. This report displays your patient’s appointments, plus appointments of their family members, even if they are booked with other clinics, books, or providers.
### PRINT APPOINTMENT LIST WINDOW

<table>
<thead>
<tr>
<th>Print For</th>
<th>This section displays the following options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Clinic:</td>
<td>This option, if selected, indicates to run the Appointment List report based on a clinic. Selecting this option enables the drop-down field. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
<tr>
<td>• Book:</td>
<td>This option, if selected, indicates to run the Appointment List report based on a book. Selecting this option enables the drop-down field. The options in this drop-down field are defined in the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see Books Window on page 668.</td>
</tr>
<tr>
<td>• Provider:</td>
<td>This option, if selected, indicates to run the Appointment List report based on a provider. Selecting this option enables the field. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>This field indicates the date for which to run the Appointment List report.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Time From</th>
<th>This field indicates the start time on the date indicated in the Date field for which to run the Appointment List report.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>To</th>
<th>This field indicates the end time on the date indicated in the Date field for which to run the Appointment List report.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>File</th>
<th>This drop-down field is displayed if you have more than one appointment report (appoint_*.rpt file) in your SReports directory.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>This drop-down field indicates the appointment report to print.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>The options in this drop-down field are the file names of all the appointment reports available in your SReports directory.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Preview</th>
<th>Clicking this button displays the Appointment List report.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Print</th>
<th>Clicking this button prints the Appointment List report to the default printer.</th>
</tr>
</thead>
</table>

| Cancel       | Clicking this button cancels any entries and closes the Appointment List window. |
39 Print Appointment Options Window

You can access this window by:

- Going to the Appointment Lists window, if the list view displays appointments (of type Active), and clicking the Print Forms button. For information on the Appointment Lists window, see Appointment Lists Window on page 28.

- Going to the Scheduler window’s Active tab and selecting the Print Appt Form right-click option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.

Use this window to print appointment forms for clinical staff or appointment reminders for patients.

![Print Appointment Options Window](image)

**PRINT APPOINTMENT OPTIONS WINDOW**

<table>
<thead>
<tr>
<th>Clinical Appointment Form</th>
<th>This option, if selected, indicates to print the appointment form for clinical staff.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Appointment Form</td>
<td>This option, if selected, indicates to print an appointment reminder form for the selected patient.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the selection, closes the Print Appointment Options window, and prints the selected form to the default printer.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels the selection and closes the Print Appointment Options window.</td>
</tr>
</tbody>
</table>

40 Provider Non-Clinic Times Window

For information on the Provider Non-Clinic Times window, refer to the axiUm Reference Manual for Maintenance and see Provider Non-Clinic Times Window on page 773.
41 Provider Working Schedules Window

For information on the Provider Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see Provider Working Schedules Window on page 735.

42 Providers Requests Window

You can access this window by going to the Scheduler window’s Availability tab and clicking (Provider Requests). For information on the Scheduler window’s Availability tab, see Scheduler Window - Availability Tab on page 134.

Use this window to view all appointment requests from the selected provider.

![Provider Requests Window](image)

**PROVIDERS REQUESTS WINDOW**

<table>
<thead>
<tr>
<th>Provider</th>
<th>This disabled field indicates the provider’s name as displayed in the taskbar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close</td>
<td>Clicking this button closes the Provider Requests window.</td>
</tr>
</tbody>
</table>

43 Reassign Appointments Window

You can access this window by:

- Going to the Scheduler window’s Chair tab, and on a chair, selecting the Reassign Appointments right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

- Going to the Scheduler window’s Active tab, and on a column heading or on an appointment time block, selecting the Reassign Appointments right-click option. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.

- Going to the Scheduler window’s Weekly tab and right-clicking a time block. For information on the Scheduler window’s Weekly tab, see Scheduler Window - Weekly Tab
Use this window to reassign a provider’s appointments to another provider. For example, if a provider is away sick for the entire day, you can reassign their entire day’s schedule to another provider. Or, you can move all appointments from one provider in a specific chair to the same provider in a different chair in a different clinic.

**REASSIGN APPOINTMENTS WINDOW**

- **Provider**
  
  The first disabled field indicate the provider ID of the selected provider.
  
  The second disabled field indicates the selected provider’s name.

- **Clinic**
  
  This disabled drop-down field indicates the clinic associated to the currently selected book.

- **Chair**
  
  This disabled drop-down field indicates the name of the currently selected chair.

- **Date**
  
  This disabled field indicates the date associated to the appointment book that is currently viewed.

- **Time From**
  
  This field indicates the starting time range for this reassignment.

- **To**
  
  This field indicates the ending time range for this reassignment.

- **Provider**
  
  This field indicates the provider ID of the provider to whom you want to reassign appointments. This provider becomes a substitute provider.

  Clicking (ellipsis) opens the *Providers List* window to select from. For information on the *Providers List* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Providers List Window* on page 133.

  The disabled field indicates the selected provider’s name.

- **Clinic**
  
  This drop-down field indicates the clinic where the substituting provider will be placed.

  The options in this drop-down field are defined in the *Clinics* window. For information on the *Clinics* window, refer to the axiUm Reference Manual for Maintenance and see *Clinics Window* on page 693.
44 Reserve Partial Session (Expert) Window

You can access this window by booking either a planned appointment or an appointment request, in a chair with no reserves, using the chair method of scheduling. You must make sure that the Appointment Expert option’s Appointments section has the ‘Make Appts’ button will schedule automatically and auto-add Reserve checkbox is selected. For information on the Appointment Expert option’s Appointments section, see Appointments Section on page 23.

Use this window to view the details of the planned or requested appointment before confirming the details and booking the appointment.
Reserve Partial Session for Provider Window

Reserve Partial Session (Expert) Window

To
This field indicates the end time range for this partial session reserve.

Full Session
This checkbox, if selected, indicates that this provider is booked for the full clinic session, not the time range indicated in the From field and To field.

Selecting this checkbox disables the From field and the To field.

Description
This field indicates a description for this partial session reserve.

Clicking (ellipsis) opens the Clinic Time Reasons window. For information on the Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see Clinic Time Reasons Window on page 689.

OK
Clicking this button saves the entries and closes the Reserve Partial Session (Expert) window.

Cancel
Clicking this button cancels the entries and closes the Reserve Partial Session (Expert) window.

45 Reserve Partial Session for Provider Window

You can access this window by going to the Scheduler window’s Chair tab, and on a chair, selecting the Reserve Partial Session for right-click option. For information on the Scheduler window’s Chair tab, see Scheduler Window - Chair Tab on page 124.

Use this window to edit the session for this provider.

Reserve Partial Session for Provider Window

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>This disabled field indicates the selected date as displayed in the taskbar.</td>
</tr>
<tr>
<td>Clinic</td>
<td>This disabled field indicates the selected clinic as displayed in the Scheduler window’s title bar.</td>
</tr>
</tbody>
</table>

Reserve Partial Session for Provider Window
46 Rolodex (Select Patient) Window

You can access this window by going to the Scheduler window and clicking (Rolodex). For information on the Scheduler window, see Scheduler Window on page 121.

Use this window to search for and select patients to view in the Patient Appointments window or the Family Appointments window. For information on the Patient Appointments window, see Patient Appointments Window on page 100. For information on the Family Appointments window, see Family Appointments Window on page 79.
**Schedule Appointment Window**

You can access this window by going to the Scheduler window’s Availability tab and clicking (Make Appointment). For information on the Scheduler window’s Availability tab, see *Scheduler Window - Availability Tab* on page 134.

Use this window to convert an appointment request into an appointment.

---

**ROLODEX (SELECT PATIENT) WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>In this field, enter the first character(s) of the item you want to find based on the search options selected. Entering an underscore ( _ ) displays all results within the selected search option.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Patient</td>
<td>Clicking this icon displays the <em>Patient Info</em> window for entering a new patient record. For information on the <em>Patient Info</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Patient Info Window</em> on page 70.</td>
</tr>
</tbody>
</table>

---

47 Schedule Appointment Window
### Schedule Appointment Window

| **Reason** | This text box displays a short description (maximum 200 characters) of the reason for the appointment. axiUm automatically enters the default reason, as defined in the Default Reason field of the Appointment Code window's Appointment Code section. For information on the Appointment Code window's Appointment Code section, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Section on page 651. |
| **Provider Time (Minutes)** | This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This section indicates to change the appointment duration using the total time required by the providers and assistants. For each new appointment, you can enter up to three provider times (using the Provider field) and three assistant times (using the Other fields). |
| **Accept** | Clicking this button saves the entries and closes the New Appointment window. |
| **Cancel** | Clicking this button cancels any entries and closes the New Appointment window. |
| **Add'l Providers** | Clicking this button opens the Appointment Additional Providers window. For information on the Appointment Additional Providers window, see Appointment Additional Providers Window on page 11. |
| **Tx. Plan...** | Clicking this button opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8. |
| **Recalls...** | Clicking this button opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 120. |
SCHEDULE APPOINTMENT WINDOW

Check in

This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This button is enabled in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.

Check out...

This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This button is enabled in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.

Reschedule

This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This button is enabled in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.

Failed

This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This button is enabled in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.

Cancelled

This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This button is enabled in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.

Notes...

Clicking this button opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40.

47.1 Patient Section

Use this section to view patient information on the selected appointment.
**47.2 Appointment Section**

Use this section to enter details for the selected appointment.
### SCHEDULE APPOINTMENT WINDOW - APPOINTMENT SECTION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is Ortho Stage</strong></td>
<td>This disabled checkbox is available if the Ortho option is selected in the Scheduler Options window's Appt Entry Window section. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This checkbox, if selected, indicates this appointment satisfies a specific stage of ortho care. This checkbox, if selected, disables the Appt. Code drop-down field and displays the Stage drop-down field. This checkbox, if deselected, hides the Stage drop-down field and the Minutes field. It also automatically enters the default reason in the Reason text box.</td>
</tr>
<tr>
<td><strong>Provider</strong></td>
<td>This disabled field indicates the provider number of the provider treating the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
<tr>
<td><strong>2nd Provider</strong></td>
<td>This field indicates the provider number of another provider (e.g. an assistant) helping to treat the patient at this appointment. Clicking (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133.</td>
</tr>
</tbody>
</table>
SCHEDULE APPOINTMENT WINDOW - APPOINTMENT SECTION

Sched. 2nd For  This checkbox is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field indicates the default option for the provider displayed in the 2nd Provider field when they are booked in an appointment as a second provider. In other words, it indicates what doctor/assistant time to use (how their time is treated) when this provider is the secondary provider for an appointment.

This drop-down field displays the following options:

• Other Time: If this provider is booked as a second provider, they will be defaulted to an assistant’s time.

• Provider Time: If this provider is booked as a second provider, they will be defaulted to a provider’s time.

• Total Time: If this provider is booked as a second provider, they will be defaulted to be present during the entire duration of the appointment.

Appt. Code  This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is deselected.

This drop-down field is disabled and set to the default ortho appointment code if the Is Ortho Stage Appointment checkbox is deselected. The default ortho appointment code is defined in the Ortho Appointment Code drop-down field of the Practice Options window’s Ortho Settings section. For information on the Practice Options window’s Ortho Settings section, refer to the axiUm Reference Manual for Maintenance and see Ortho Settings Section on page 443.

This drop-down field indicates the appointment code for the appointment you are booking.

The options in this drop-down field are defined in the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.

Stage  This drop-down field is available if the Scheduler Options window’s Appt Entry Window section displays the Ortho option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This drop-down field is enabled if the Is Ortho Stage Appointment checkbox is selected.

This drop-down field indicates the ortho stage for the appointment you are booking.

The options in this drop-down field are defined in the Stage Codes window. For information on the Stage Codes window, refer to the axiUm Reference Manual for Maintenance and see Stage Codes Window on page 547.
SCHEDULE APPOINTMENT WINDOW - APPOINTMENT SECTION

**Tx Discipline**

This drop-down field indicates the discipline under which the appointment treatment belongs.

This drop-down field defaults to the discipline associated with the appointment code displayed in the Appt. Code drop-down field.

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

If the Is Ortho Stage Appointment checkbox is selected, this drop-down field is limited to displaying only ortho-type disciplines.

**Appt. Status**

This drop-down field indicates the status of the appointment you are booking.

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.

**Rank**

This drop-down field is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804.

This field is for internal purposes and indicates a numeric ranking of an appointment's importance that can be used to make cancellation decisions when chairs are limited.

**Recall**

This checkbox, if selected, indicates that this appointment is a recall appointment to a treatment follow-up.

If the Appt. Code drop-down field displays a recall-type appointment, axiUm automatically selects this checkbox.

The drop-down field indicates the type of recall appointment you want to make for the selected patient, and lists all recalls types for this patient. If the patient has no recalls listed, you can leave this drop-down field blank.

47.3 Pt Information Section

Use this section to enter other patient information for the selected appointment.
**47.4 Appt Details Section**

Use this section to enter other appointment details for the selected appointment.

**SCHEDULE APPOINTMENT WINDOW - APPT DETAILS SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>This static field displays the time of the appointment. This static field is calculated in conjunction with the Appt. Code drop-down field.</td>
</tr>
<tr>
<td>Minutes</td>
<td>This field is enabled if the Is Ortho Stage Appointment checkbox is selected. This field indicates the number of minutes required for this ortho appointment you are booking.</td>
</tr>
</tbody>
</table>

---

**SCHEDULE APPOINTMENT WINDOW - PT INFORMATION SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pt Status</td>
<td>This static field displays the patient’s status, as entered in the Status drop-down field of the Patient Info window’s Personal tab’s Personal section. For information on the Personal tab’s Personal section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Personal Section on page 73.</td>
</tr>
<tr>
<td>Time</td>
<td>This static field indicates the best time to contact the patient, as entered in the Time field of the Patient Info window’s Personal tab’s Contact section. For information on the Personal tab’s Contact section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Contact Section on page 76.</td>
</tr>
<tr>
<td>Pref. Time</td>
<td>This field indicates the best time to schedule an appointment for this patient, as entered in the Pref. Appt field of the Patient Info window’s Codes tab’s Additional section. For information on the Codes tab’s Additional section, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Additional Section on page 79.</td>
</tr>
<tr>
<td>Patient Due</td>
<td>This disabled displays the total amount the patient owes to date.</td>
</tr>
<tr>
<td>Estimate $</td>
<td>This field is available if the Scheduler Options window’s Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window’s Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. This field indicates the estimate for this appointment treatment.</td>
</tr>
<tr>
<td>Tx Plan Total</td>
<td>This disabled field displays the total amount of the treatment plan.</td>
</tr>
</tbody>
</table>
**Scheduler Window**

This is the main Scheduler module window. The default tab is either the Chair tab or the Active tab, depending on your setup.

You can access this window by:

- Clicking ![Scheduler](Scheduler) from the axiUm main screen icons.
- Clicking the Scheduler option from the Actions menu.
- Clicking ![Scheduler](Scheduler) from the Desktop.

Use this window for all your daily scheduling tasks.

---

**Schedule Appointment Window - Appt Details Section**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>This disabled field indicates the last name and first name of the instructor associated to this appointment. Clicking <img src="ellipsis" alt="ellipsis" /> opens the Instructor List window to select from. For information on the Instructor List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Instructor List Window on page 35.</td>
</tr>
<tr>
<td>Chair</td>
<td>This static field is used in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td>Made on</td>
<td>This static field displays the date that the appointment was booked, and default to today's date.</td>
</tr>
<tr>
<td>Last user</td>
<td>This static field is used in the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td>Sooner if possible</td>
<td>This checkbox, if selected, indicates that the patient wants to come in sooner than scheduled, if there is an earlier opening due to a cancellation. This can be used to generate reports of people that are willing to come in earlier that can be sued by staff to create short notice appointments.</td>
</tr>
<tr>
<td>Short Notice</td>
<td>This checkbox, if selected, indicates that the patient can be bumped up if there's an earlier opening, due to cancellation; not necessarily because the patient asked for it but because the institution allows it for the selected appointment.</td>
</tr>
<tr>
<td>Confirm</td>
<td>This button is available if the Scheduler Options window's Appt Entry Window section displays the Advanced option. For information on the Scheduler Options window's Appt Entry Window section, refer to the axiUm Reference Manual for Maintenance and see Appt Entry Window Section on page 804. Clicking this button indicates patient confirmation and changes the field display from NOT CONFIRMED to CONFIRMED.</td>
</tr>
</tbody>
</table>

---

48 Scheduler Window

This is the main Scheduler module window. The default tab is either the Chair tab or the Active tab, depending on your setup.

You can access this window by:

- Clicking ![Scheduler](Scheduler) from the axiUm main screen icons.
- Clicking the Scheduler option from the Actions menu.
- Clicking ![Scheduler](Scheduler) from the Desktop.

Use this window for all your daily scheduling tasks.
**SCHEDULER WINDOW**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Rolodex)</td>
<td>Clicking this icon displays the <em>Rolodex (Select Patient)</em> window. For information on the <em>Rolodex (Select Patient)</em> window, see <em>Rolodex (Select Patient) Window</em> on page 112.</td>
</tr>
<tr>
<td>(Book)</td>
<td>This icon is available if the <em>Active</em> tab, the <em>Pending</em> tab, the <em>Weekly</em> tab, or the <em>Monthly</em> tab is selected. Clicking this icon displays the <em>Appt. Books</em> window. For information on the <em>Appt. Books</em> window, see <em>Appt. Books Window</em> on page 53.</td>
</tr>
<tr>
<td>(Clinic)</td>
<td>This icon is available if the <em>Chair</em> tab or the <em>Availability</em> tab is selected. Clicking this icon displays the <em>Clinics</em> window. For information on the <em>Clinics</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Clinics Window</em> on page 693.</td>
</tr>
<tr>
<td>(Expert)</td>
<td>Clicking this icon displays the <em>Appointment Expert</em> window (in regular mode). For information on the <em>Appointment Expert</em> window (regular mode), see <em>Appointment Expert Window (Regular Mode)</em> on page 12.</td>
</tr>
<tr>
<td>(Lists)</td>
<td>Clicking this icon displays the <em>Appointment Lists</em> window. For information on the <em>Appointment Lists</em> window, see <em>Appointment Lists Window</em> on page 28.</td>
</tr>
<tr>
<td>(Notes/</td>
<td>Clicking this icon displays the <em>Stickies</em> window. For information on the <em>Stickies</em> window, refer to the axiUm QuickStart Guide and see <em>Stickies Window</em> on page 9.</td>
</tr>
<tr>
<td>Stickies)</td>
<td></td>
</tr>
<tr>
<td>(Non-Clinic</td>
<td>Clicking this icon displays the <em>Provider Non-Clinic Times</em> window. For information on the <em>Provider Non-Clinic Times</em> window, see <em>Provider Non-Clinic Times Window</em> on page 107.</td>
</tr>
<tr>
<td>Times)</td>
<td></td>
</tr>
</tbody>
</table>
## Scheduler Window

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Work Schedules" /></td>
<td>Clicking this icon displays the Provider Working Schedules window. For information on the Provider Working Schedules window, refer to the axiUm Reference Manual for Maintenance and see Provider Working Schedules Window on page 735.</td>
</tr>
<tr>
<td><img src="image" alt="Print List" /></td>
<td>Clicking this icon displays the Appointment List window. For information on the Appointment List window, see Print Appointment List Window on page 105.</td>
</tr>
<tr>
<td><img src="image" alt="Print View" /></td>
<td>If you are currently on the Active tab, clicking this icon displays the Appointment Report window to set your print configurations for the Appointment Report. For information on the Appointment Report window, see Appointment Report Window on page 44. If you are currently on any other tab, clicking this icon prints the contents of the selected tab to the default printer.</td>
</tr>
<tr>
<td><img src="image" alt="Options/Settings" /></td>
<td>Clicking this icon displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 796.</td>
</tr>
<tr>
<td><img src="image" alt="Today" /></td>
<td>Clicking this icon moves the appointment book to today’s date.</td>
</tr>
<tr>
<td><img src="image" alt="Date" /></td>
<td>Clicking this icon displays a drop-down calendar to select a date. Clicking (minus) moves the displayed date one day earlier. Clicking (plus) moves the displayed date one day later.</td>
</tr>
</tbody>
</table>
| ![1 Week](image) | Clicking this icon displays the following options:  
* 1 Day: Selecting this option changes this icon to display 1 Day.  
* 1 Week: Selecting this option changes this icon to display 1 Week.  
* 1 Month: Selecting this option changes this icon to display 1 Month.  
* 6 Months: Selecting this option changes this icon to display 6 Months.  
Clicking (minus) moves the displayed date back by one increment, for the time length selected above. For example, if you selected the 1 Day option, clicking this icon moves the date back by one day.  
Clicking (plus) moves the displayed date forward by one increment for the time length selected above. For example, if you selected the 1 Month option above, clicking this icon moves the date ahead by one month. |
| ![Select Provider](image) | This icon displays the provider’s name. Clicking this icon displays the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133. |
**SCHEDULER WINDOW**

This icon displays the selected patient's name, gender, and age.

Clicking this icon displays the following options:

- **Select Patient**: Clicking this option makes the displayed patient the active patient.

- **Patient Info**: Clicking this option displays the Patient Info window. For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window on page 70.

- **Patient Card**: Clicking this option displays the Patient Card window with information about the currently selected patient. For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

- **Patient Appointments**: This option is displayed if the Mode drop-down field displays the Patient option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804. Clicking this option displays the Patient Appointments window. For information on the Patient Appointments window, see Patient Appointments Window on page 100.

- **Family Appointments**: This option is displayed if the Mode drop-down field displays the Family option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804. Clicking this option displays the Family Appointments window. For information on the Family Appointments window, see Family Appointments Window on page 79.

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### 48.1 Scheduler Window - Chair Tab

You can access this window by going to the Scheduler window and clicking the Chair tab. For information on the Scheduler window, see Scheduler Window on page 121.

This tab displays the selected clinic’s chair layout.

axiUm opens this tab as the default if the Chair option is selected in the Scheduler Options window’s Scheduler Type section. For information on the Scheduler Options window’s Scheduler Type section, refer to the axiUm Reference Manual for Maintenance and see Scheduler Type Section on page 797.

The chair layout displayed in this tab is set up in the Clinic Layout window. For information on the Clinic Layout window, refer to the axiUm Reference Manual for Maintenance and see Clinic Layout Window on page 687.
**Scheduler Window - Chair Tab**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[chair]</td>
<td>Clicking on a chair reserves it under the logged in provider's name. axiUm displays the provider's name on the chair.</td>
</tr>
<tr>
<td>Select Clinic...</td>
<td>This right-click option opens the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
<tr>
<td>Make Appt Request...</td>
<td>This right-click option is used for making appointment requests. Selecting this right-click option displays the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.</td>
</tr>
<tr>
<td>Reserve Chair for...</td>
<td>This right-click option opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Providers List Window on page 133. This right-click option reserves the chair for the entire session for a selected provider. axiUm displays the selected provider’s name on the chair.</td>
</tr>
<tr>
<td>Reserve Partial Session for...</td>
<td>This right-click option is displayed if the Enable Partial Reserve on Chair Tab checkbox is selected in the Scheduler Options window’s Chair Labels section. For information on the Scheduler Options window’s Chair Labels section, refer to the axiUm Reference Manual for Maintenance and see Chair Labels Section on page 803. This right-click option opens the Reserve Partial Session for Provider window. For information on the Reserve Partial Session for Provider window, see Reserve Partial Session for Provider Window on page 111.</td>
</tr>
</tbody>
</table>
**SCHEDULER WINDOW - CHAIR TAB**

<table>
<thead>
<tr>
<th>Right-Click Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve for Second Provider...</td>
<td>This right-click option opens the <strong>Providers List</strong> window to select from. For information on the <strong>Providers List</strong> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <strong>Providers List Window</strong> on page 133. This right-click option adds the selected provider as an assistant on the one reserve or selected reserves if more than one for the session. Chairs reserved with a second provider display an asterisk ( * ).</td>
</tr>
<tr>
<td>Unreserve Chair</td>
<td>This right-click option is enabled if the selected chair is reserved for a main provider. This right-click option removes the main provider from the chair reservation. Removing the reservation for the main provider will remove any reservations made for a second provider.</td>
</tr>
<tr>
<td>Unreserve Second Provider</td>
<td>This right-click option is enabled if the selected chair is reserved for a second provider. This right-click option removes the second provider from the chair reservation.</td>
</tr>
<tr>
<td>Move Reservation</td>
<td>This right-click option moves the selected reservation (provider and their patient) to another chair in the current clinic or a different clinic. A new clinic has to be selected using the <strong>Select Clinic</strong> right-click option. Reservations can be moved between sessions, but not between different dates.</td>
</tr>
<tr>
<td>Move Reservation (within Clinic)</td>
<td>This right-click option moves the selected reservation (provider and their patient) to another chair in this same clinic.</td>
</tr>
<tr>
<td>Edit Partial Clinic Times...</td>
<td>This right-click option is displayed if the <strong>Enable Partial Reserve on Chair Tab</strong> checkbox is selected in the <strong>Scheduler Options</strong> window’s <strong>Chair Labels</strong> section. For information on the <strong>Scheduler Options</strong> window’s <strong>Chair Labels</strong> section, refer to the axiUm Reference Manual for Maintenance and see <strong>Chair Labels Section</strong> on page 803. This right-click option opens the <strong>Edit Partial Clinic Times</strong> window. For information on the <strong>Edit Partial Clinic Times</strong> window, see <strong>Edit Partial Clinic Times Window</strong> on page 67.</td>
</tr>
<tr>
<td>Edit Clinic Time Description</td>
<td>This right-click option opens the <strong>Edit Clinic Time Description</strong> window. For information on the <strong>Edit Clinic Time Description</strong> window, see <strong>Edit Clinic Time Description Window</strong> on page 66.</td>
</tr>
</tbody>
</table>
**SCHEDULER WINDOW - CHAIR TAB**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Synchronize Reservations** | This right-click option is enabled if:  
  - The selected date is in the past  
  - The selected clinic has overflow chairs  
  - The session has started and finished  
  - There are available chairs with no reserves, or reserved for a provider with no appointments started yet.  
  
  This right-click menu option automatically moves the student and their patient(s) from overflow chairs to chairs that are available (no reserved provider, or has a reserved provider but the patient has not check in yet) within the clinic.  
  
  Processing continues in a non-recursive loop to bump providers from the overflow chairs (chairs with reserves that have appointments) into available chairs. This is done by using Patient check-in times (for appointments in chairs) so this is on a first-come, first-serve basis, and is sub-sorted by reserve times (for those institutions not using patient check-ins, it will be done on first asked, first served).  
  
  For each provider in an overflow chair, axiUm looks for an available chair in the current clinic, in the following order: First, it tries an available chair with no reserve. Second, it looks for one with a reserve long enough and not over with no appointments. Third, it looks for one with a reserve long enough and not over with appointments where patient didn't show up yet. |
| **Reassign Appointments...** | This right-click option is enabled if there are appointments in this chair for the selected date.  
  
  This right-click option opens the Reassign Appointments window. For information on the Reassign Appointments window, see Reassign Appointments Window on page 108. |
| **Academic Cancellation** | This right-click option opens the Academic Cancellation window. For information on the Academic Cancellation window, see Academic Cancellation Window on page 1. |
| **Make Unavailable** | This right-click option opens the Make Unavailable window. For information on the Make Unavailable window, see Make Unavailable Window on page 84. |
| **Undo Unavailable** | This right-click option is enabled if the selected chair is unavailable.  
  
  This right-click option makes the selected chair available. |
| **Session Layouts...** | This right-click option opens the Discipline/Group Layout window. For information on the Discipline/Group Layout window, see Discipline/Group Layout Window on page 57. |
| **Daily Layout...** | This right-click option opens the Daily Layout window. For information on the Daily Layout window, see Daily Layout Window on page 56. |
48.2 Scheduler Window - Active Tab

You can access this window by going to the Scheduler window and clicking the Active tab. For information on the Scheduler window, see Scheduler Window on page 121.

This tab displays the selected appointment book in daily layout.

axiUm opens this tab as the default if the Book option is selected in the Scheduler Options window’s Scheduler Type section. For information on the Scheduler Options window’s Scheduler Type section, refer to the axiUm Reference Manual for Maintenance and see Scheduler Type Section on page 797.

Appointment time blocks indicate patient appointments. If a provider is double-booked in a chair, for the same start time and time length, axiUm uses split-column display of the appointments. If a provider is double-booked in a chair, for slightly different start time and time length, axiUm uses a staggered display of the appointments.
## Scheduler Window - Active Tab

### [Appointment Block Colors]
Time block statuses are indicated by the following background colors:

- Grey: Not available for booking appointments. When a patient has been checked out the appointment box displays grey text.
- Yellow: Available for making appointments.
- White or custom color blocks: Appointments. The appointment block can be customized to show up to five lines of data about the patient appointment. The appointment background color can also be customized in the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 796.

### [Appointment Text Colors]
Appointment statuses are indicated by the following text colors:

- Green: Appointment is unconfirmed.
- Blue: Appointment is confirmed.
- Red: Patient has been checked in.
- Black: The patient is seated.

### [Vertical Appointment Bars]
The colored vertical bar at the left side of the appointment’s time slot (not the column) is the provider’s schedule color, as indicated in the Schedule Color field of the Users window’s Provider tab’s Scheduler section. For information on the Provider tab’s Scheduler section, refer to the axiUm Reference Manual for Maintenance and see Scheduler Section on page 514.

### [Appointment Indicators]
An A in the right bottom corner of the appointment time block indicates that the patient has an alert. There are two types of alerts, indicated by color:

- Red: A medical alert
- Green: A patient alert.

Additional indicators can be displayed. These additional indicators are used in conjunction with the Appointment Indicators to Display window. For information on the Appointment Indicators to Display window, refer to the axiUm Reference Manual for Maintenance and see Appointment Indicators to Display Window on page 807.

### [Vertical Column Bars]
The vertical bar (the additional fixed column next to the time column) indicates the different types of provider time, and displays the following colors:

- Green: Single booking
- Red: Multiple bookings
- Gray: Unavailable, non-clinic time (e.g., lunch break)

This feature works in conjunction with the Show Provider Time Column for Current Provider checkbox in the Scheduler Options window’s Options section. For information on the Scheduler Options window’s Options section, refer to the axiUm Reference Manual for Maintenance and see Options Section on page 799.
<table>
<thead>
<tr>
<th>Scheduler Window - Active Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add Non-Clinic Time...</strong></td>
</tr>
<tr>
<td>This right-click option opens the Add Provider Non-Clinic Times window. For information on the Add Provider Non-Clinic Times window, see Add Provider Non-Clinic Times Window on page 2.</td>
</tr>
</tbody>
</table>

| **Edit Non-Clinic Time...**  |
| This right-click option opens the Edit Provider Non-Clinic Times window for editing the selected non-clinic time. For information on the Edit Provider Non-Clinic Time window, see Edit Provider Non-Clinic Times Window on page 73. |

| **Delete Non-Clinic Time...** |
| This right-click option deletes the selected non-clinic time. |

| **Edit Clinic Time Description...**  |
| This right-click option opens the Edit Clinic Time Description window. You can manually enter a description instead of selecting from the predefined list. |

*axiUm* displays the clinic time description at the start of the chair reservation using the color defined in the Default Color field of the Clinic Time Reasons window. Manually entered descriptions are displayed in yellow.  
For information on the Edit Clinic Time Description window, see Edit Clinic Time Description Window on page 66. |

| **Reassign Appointments...** |
| This right-click option opens the Reassign Appointments window. For information on the Reassign Appointments window, see Reassign Appointments Window on page 108. |

| **Fill from Wait List...** |
| This right-click option opens the Appointment Lists window. For information on the Appointment Lists window, see Appointment Lists Window on page 28. |

| **Make Appt Request...** |
| This right-click option is used for making appointment requests. Selecting this right-click option displays the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112. |

| **Patient Card...** |
| This right-click option opens the Patient Card window with information about the currently selected patient.  
For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55. |

| **Select Patient** |
| This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar. |

| **Show History...** |
| This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25. |

| **Dial Patient** |
| This right-click option will dial the patient’s phone number to a phone connected to the current workstation. |

| **Appointment Expert...** |
| This right-click option opens the Appointment Expert window (in regular mode). For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12. |

| **Appointment Treatments** |
| This right-click option opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Appointment Treatments Window on page 8. |
### Scheduler Window - Active Tab

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
<td>This right-click option opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40.</td>
</tr>
<tr>
<td>Change to Planned</td>
<td>This right-click option changes the selected hovering appointment block to a planned appointment. The planned appointment is displayed in the Appointment Lists window’s Appointments tab. For information on the Appointment Lists window’s Appointments tab, see Appointment Lists Window - Appointments Tab on page 31.</td>
</tr>
<tr>
<td>Move to Pending Page</td>
<td>This right-click option changes the selected hovering appointment block from the Chair tab to the Pending tab. For information on the Pending tab, see Scheduler Window - Pending Tab on page 138.</td>
</tr>
<tr>
<td>Move to Availability</td>
<td>This right-click option is available if the selected hovering appointment block began as an appointment request, using the New Appointment Request window. For information on the New Appointment Request window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see New Appointment Request Window on page 48. This right-click option moves the hovering appointment block to the Scheduler window’s Availability tab’s Request tab. For information on the Availability tab, see Scheduler Window - Availability Tab on page 134.</td>
</tr>
<tr>
<td>Confirm</td>
<td>This right-click option confirms the selected appointment. Confirmed appointments are displayed in blue text.</td>
</tr>
<tr>
<td>Edit</td>
<td>This right-click option opens the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td>Cancel</td>
<td>This right-click option cancels the selected appointment. A cancelled appointment is one that either the patient or the provider does not want to attend at this time. This right-click option opens the Cancellation window. For information on the Cancellation window, see Cancellation Window on page 54.</td>
</tr>
<tr>
<td>Failed</td>
<td>This right-click option indicates that either the patient or the provider failed to arrive at their appointment. A failed appointment is one that either the patient did not attend and did not provide notice for. They did not cancel and did not show up.</td>
</tr>
<tr>
<td>Delete</td>
<td>This right-click option removes the appointment from the Active tab.</td>
</tr>
<tr>
<td>Patient Approvals</td>
<td>This right-click option opens the Patient Approvals window. For information on the Patient Approvals window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Approvals Window on page 53.</td>
</tr>
<tr>
<td>Patient Check In</td>
<td>This right-click option indicates that the patient has been checked into the clinic. Checked in patients are indicated on the appointment block in red text.</td>
</tr>
<tr>
<td>Undo Patient Check In</td>
<td>This right-click option is enabled if the Check In right-click option was selected. If the Patient Check In right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td><strong>Scheduler Window - Active Tab</strong></td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td><strong>Patient Check Out</strong></td>
<td>This right-click option is enabled if the Patient Check In right-click option was selected. This right-click option indicates that the patient has been checked out of the clinic. Checked in patients are indicated on the appointment block in gray text.</td>
</tr>
<tr>
<td><strong>Patient Check In Form</strong></td>
<td>This right-click option opens the <em>Patient Check In Form</em>.</td>
</tr>
<tr>
<td><strong>Patient Seated</strong></td>
<td>This right-click option is enabled if the patient <em>Check In</em> option was selected. This right-click option sets the appointment status to patient seated. This is visually indicated in the Active tab by black text in the appointment box. This option is only available if the patient is already checked in.</td>
</tr>
<tr>
<td><strong>Undo Patient Seated</strong></td>
<td>This right-click option is enabled if the <em>Patient Seated</em> right-click option was selected. If the <em>Patient Seated</em> right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td><strong>Chart Request</strong></td>
<td>This right-click option opens the <em>Request Chart-Out</em> window. For information on the <em>Request Chart-Out</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Request Chart-Out Window</em> on page 143.</td>
</tr>
<tr>
<td><strong>Patient Recalls</strong></td>
<td>This right-click option opens the <em>Patient Recalls</em> window. For information on the <em>Patient Recalls</em> window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Patient Recalls Window</em> on page 120.</td>
</tr>
<tr>
<td><strong>Reschedule</strong></td>
<td>This right-click option changes the selected scheduled appointment block into a hovering appointment block.</td>
</tr>
<tr>
<td><strong>Edit X-Ray Info</strong></td>
<td>This right-click option is enabled if the selected appointment is for a hygiene-type appointment code. If the appointment is for today or in the future, this right-click option opens the <em>X-Ray Information</em> window. If the appointment was in the past and the <em>X-Rays Taken</em> checkbox was deselected in the <em>X-Ray Information</em> window, you cannot open that <em>X-Ray Information</em> window. For information on the <em>X-Ray Information</em> window, see <em>X-Ray Information Window</em> on page 152.</td>
</tr>
<tr>
<td><strong>Next appointment...</strong></td>
<td>If the patient has another appointment in the future, this right-click option opens the <em>Edit Appointment</em> window for the patient’s next appointment. For information on the <em>Edit Appointment</em> window, see <em>Edit Appointment Window</em> on page 59. If the patient does not have another appointment, axiUm notifies you that the patient does not have another appointment and asks if you would like to add a new one.</td>
</tr>
<tr>
<td><strong>Make appointment...</strong></td>
<td>This right-click option opens the <em>New Appointment</em> window. For information on the <em>New Appointment</em> window, see <em>New Appointment Window</em> on page 88.</td>
</tr>
</tbody>
</table>
## Scheduler Window - Active Tab

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient Appointments</strong></td>
<td>This right-click option is available if the Mode drop-down field displays the Patient option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804. This right-click option opens the Patient Appointments window. For information on the Patient Appointments window, see Patient Appointments Window on page 100.</td>
</tr>
<tr>
<td><strong>Family Appointments</strong></td>
<td>This right-click option is available if the Mode drop-down field displays the Family option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804. This right-click option opens the Family Appointments window. For information on the Family Appointments window, see Family Appointments Window on page 79.</td>
</tr>
<tr>
<td><strong>Print Appt Form</strong></td>
<td>This right-click option opens the Print Appointment Options window. For information on the Print Appointment Options window, see Print Appointment Options Window on page 107.</td>
</tr>
<tr>
<td><strong>Select Providers/Chairs...</strong></td>
<td>This right-click option is enabled if you have the Allow dynamic columns for providers/chairs checkbox selected in the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see Books Window on page 668. This right-click option opens the Book's Chair Selection window. For information on the Book's Chair Selection window, refer to the axiUm Reference Manual for Maintenance and see Book's Chair Selection Window on page 673. The selected provider or chair is temporarily added for this session only. The next time you open the Scheduler window, the book will be restored to display all original columns.</td>
</tr>
<tr>
<td><strong>Remove Provider/Chair</strong></td>
<td>This right-click option is enabled if you have the Allow dynamic columns for providers/chairs checkbox selected in the Books window. For information on the Books window, refer to the axiUm Reference Manual for Maintenance and see Books Window on page 668. This right-click option temporarily removes the selected provider or chair column for this session only. The next time you open the Scheduler window, the book will be restored to display all original columns. If you use the Appointment Expert window (in regular mode) to select an appointment for a chair that you removed, and then book the appointment in this chair, axiUm returns the associated column (i.e. chair) to the Active tab for booking. For information on the Appointment Expert window (regular mode), see Appointment Expert Window (Regular Mode) on page 12.</td>
</tr>
</tbody>
</table>
**48.3 Scheduler Window - Availability Tab**

You can access this window by going to the Scheduler window and clicking the Availability tab. For information on the Scheduler window, see *Scheduler Window* on page 121.

Use this tab to process appointments by matching student appointment requests with patient appointments.

axiUm opens this tab as the default if the Availability option is selected in the Scheduler Options window’s Scheduler Type section. For information on the Scheduler Options window’s Scheduler Type section, refer to the axiUm Reference Manual for Maintenance and see *Scheduler Type Section* on page 797.
SCHEDULER WINDOW - AVAILABILITY TAB

**Patient**
This first static field displays the selected patient’s name.

The second static field displays the selected patient’s phone number.

**Provider Requests**
Clicking this icon displays the Providers Requests window. For information on the Providers Requests window, see Providers Requests Window on page 108.

**Patient Card**
Clicking this icon displays the Patient Card window with information about the currently selected patient.

For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55.

**Make Appointment**
You can use this icon if the Availability option is selected in the Scheduler Options window’s Scheduler Type section. For information on the Scheduler Options window’s Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804.

If the Availability option is deselected in the Scheduler Options window’s Scheduler Type section, you must book the appointment in the Scheduler window’s Active tab. For information on the Scheduler window’s Active tab, see Scheduler Window - Active Tab on page 128.

If the selected item is an appointment request, clicking this icon opens the Schedule Appointment window. For information on the Schedule Appointment window, see Schedule Appointment Window on page 113.

If no item is selected, clicking this icon opens the New Appointment window. For information on the New Appointment window, see New Appointment Window on page 88.
## SCHEDULER WINDOW - AVAILABILITY TAB

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong></td>
<td>This tab displays active appointments for the selected patient.</td>
</tr>
<tr>
<td><strong>Request</strong></td>
<td>This tab displays appointment requests for the selected patient.</td>
</tr>
<tr>
<td><strong>History</strong></td>
<td>This tab displays a historic record of all appointment activities for the selected patient.</td>
</tr>
<tr>
<td><strong>Provider</strong></td>
<td>This static field displays the last name and first name of the currently selected provider.</td>
</tr>
<tr>
<td><strong>Clinic</strong></td>
<td>This drop-down field displays the clinic for which availability detail is displayed in the Availability section. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.</td>
</tr>
</tbody>
</table>

**Daily Availability**

This section displays availability indicators for the selected provider.

This section displays time blocks in the following possible colors:

- **White**: The chair is not reserved by anyone.
- **Yellow**: The chair is reserved without an appointment made yet.
- **Red**: The chair is reserved for another person with a student entered appointment.
- **Blue**: The chair is reserved for another person with a staff entered appointment.
- **Green**: The chair is reserved for the student currently logged in.
- **Gray**: An unavailable time slot.
- **Bronze**: The time is scheduled off for a holiday.

**Chairs / Instructors Currently Reserved**

This section displays the reserved chairs for the provider indicated on the Provider static field, for the clinic indicated in the Clinic drop-down field.

**Procedures**

Highlighting an item from the Availability tab’s Active tab’s list view displays the procedures associated to that active appointment.

**Dep’t Criteria**

This section indicates the number of procedures of a certain discipline this clinic is allowed to perform, including the number of these procedure remaining that are allowed to be performed.

The selected procedure limits for this clinic are defined in the Clinical Procedure Limits window. For information on the Clinical Procedure Limits window, refer to the axiUm Reference Manual for Maintenance and see Clinic Procedure Limits Window on page 690.

This section displays the following columns:

- **Description**: This column shows what is limited.
- **Max.**: This column shows the maximum allowed for the session.
- **Left**: This column shows the amount remaining to be scheduled before the limit is reached. When you exceed the limit, this column displays a negative amount.
### Scheduler Window - Availability Tab

| **Update Criteria** | This right-click option is enabled if an item is highlighted in the Request tab’s list view.  
This right-click option updates the Availability section to reflect the highlighted item in the Request tab’s list view. |
|---------------------|-------------------------------------------------------------------------------------------------|
| **Make Appointment** | Clicking this button makes an appointment using the highlighted item from the list view.  
This is equivalent to the Make Appointments right-click option. |
| **Select Patient**  | This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar. |
| **Show History...** | This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25. |
| **Dial Patient**    | This right-click option will dial the patient's phone number to a phone connected to the current workstation. |
| **Add to Wait List**| This right-click option opens the Add to Wait List window. For information on the Add to Wait List window, see Add to Wait List Window on page 6. |
| **Change to Request** | This right-click option is enabled if the item highlighted in the Scheduler window’s Availability tab’s History tab is an appointment of type Planned.  
This right-click option opens the Appointment Request window. For information on the Appointment Request window, see Appointment Request Window on page 45. |
| **Schedule**        | This right-click option is available if the item highlighted in the History tab’s list view is an appointment of type Pending or Planned.  
Clicking this button does one of the following:  
• If the 'Make Appt' button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm books the appointment.  
• If the 'Make Appt' button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm changes the highlighted item in the list view to a hovering appointment block.  
For information on the Appointment Expert Options window’s Appointments section, see Appointments Section on page 23. |
| **Reschedule**      | This right-click option is available if an item is highlighted in the Availability tab’s Active tab’s list view or the Availability tab’s History tab’s list view.  
This right-click option changes the highlighted item into a hovering appointment block. |
| **Confirm**         | This right-click option confirms the selected appointment.  
Confirmed appointments are displayed in the Scheduler window’s Active tab’s appointment time block in blue text. |
| **Edit**            | This right-click option opens the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59. |
**Scheduler Window - Availability Tab**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel</td>
<td>This right-click option cancels the selected appointment. A cancelled appointment is one that either the patient or the provider does not want to attend at this time. This right-click option opens the Cancellation window. For information on the Cancellation window, see Cancellation Window on page 54.</td>
</tr>
<tr>
<td>Fail</td>
<td>This right-click option indicates that either the patient or the provider failed to arrive at their appointment. A failed appointment is one that either the patient did not attend and did not provide notice for. They did not cancel and did not show up.</td>
</tr>
<tr>
<td>Undo Cancel/Fail</td>
<td>If the Cancel right-click option or the Fail right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td>Delete</td>
<td>This right-click option removes the highlighted item from the Availability tab’s Active tab. It also removes the appointment time block from the Scheduler window's Active tab.</td>
</tr>
<tr>
<td>Print Appt Form</td>
<td>This right-click option is enabled in the Availability tab’s Active tab. This right-click option opens the Print Appointment Options window. For information on the Print Appointment Options window, see Print Appointment Options Window on page 107.</td>
</tr>
</tbody>
</table>

### 48.4 Scheduler Window - Pending Tab

You can access this window by going to the Scheduler window and clicking the Pending tab. For information on the Scheduler window, see Scheduler Window on page 121.

Use this tab to temporarily hold appointments while waiting to enter pre-scheduling information. For example, when booking an appointment with a patient on the phone and the patient needs to call back to confirm the appointment, or if you are uncertain of a provider’s availability during a certain appointment block.
Scheduler Window - Pending Tab

**Group**
This drop-down field indicates the user group used in the search criteria. The options displayed 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.

**Provider**
This field indicates the provider number of the provider in the search criteria. Clicking ✉️ (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 133.

Entering a provider in this field enables the For Patients assigned to Provider checkbox.

**User**
This field indicates the last name and first name of the entry user in the search criteria. Clicking ✉️ (ellipsis) opens the Users List window to select from. For information on the Users List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Users List Window on page 166.

Clicking ✗ (delete) removes the currently selected user name from the field.

**Clinic**
This drop-down field indicates the clinic used in the search criteria. The options in this drop-down field are defined in the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 693.
### SCHEDULER WINDOW - PENDING TAB

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td>This field indicates the appointment code used in the search criteria. Clicking ... (ellipses) opens the Appointment Code window to select from. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 649.</td>
</tr>
<tr>
<td><strong>For Patients assigned to Provider</strong></td>
<td>This checkbox is enabled if the Provider field displays a provider. This checkbox, if selected, indicates to search for patients assigned to the provider indicated in the Provider field.</td>
</tr>
</tbody>
</table>
| **Search**          | Clicking this button starts the search process. The search results depend on who you are logged in as:  
- If there is a user in the User field, and no provider in the Provider field, the search results will only include those appointments that were made pending by the user indicated (Last user) and any provider as the appt provider.  
- If there is a provider in the Provider field, and no user in the User field, the search results will include those appointments that have that provider as the 1st, 2nd, or other provider and made pending by any user.  
- If there is a user in the User field, and a provider in the Provider field, the search results will include those appointments that have that provider as the 1st, 2nd, or other provider and also that provider as the user (Last user).  
Note: It does not matter what mode you are in (chair, book, etc.); the results are the same except that in chair mode, there is no user, just the provider, which means that it shows all appointments with that provider as the 1st, 2nd, or other provider regardless of the user who made the appointment pending. In another words, in chair mode it displays you as the provider, and in book mode it displays you as the user. |
| **Patient Card...** | This right-click option opens the Patient Card window with information about the currently selected patient. For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 55. |
| **Select Patient**  | This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar. |
| **Show History...** | This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25. |
| **Dial Patient**    | This right-click option will dial the patient’s phone number to a phone connected to the current workstation. |
| **Patient Approvals** | This right-click option opens the Patient Approvals window. For information on the Patient Approvals window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Approvals Window on page 53. |
## Scheduler Window - Pending Tab

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Appointments...</td>
<td>This right-click option opens one of the following windows:</td>
</tr>
<tr>
<td></td>
<td>• <em>Patient Appointments</em> window: This window is displayed if the Mode drop-down field displays the Patient option in the Scheduler Options window’s Patient/Family Appointments Window section. For information on the <em>Patient Appointments</em> window, see <em>Patient Appointments Window</em> on page 100.</td>
</tr>
<tr>
<td></td>
<td>• <em>Family Appointments</em> window: This window is displayed if the Mode drop-down field displays the Family option in the Scheduler Options window’s Patient/Family Appointments Window section. For information on the <em>Family Appointments</em> window, see <em>Family Appointments Window</em> on page 79.</td>
</tr>
<tr>
<td></td>
<td>For information on the Scheduler Options window’s Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see <em>Patient/Family Appointments Window Section</em> on page 804.</td>
</tr>
<tr>
<td>Chart Request</td>
<td>This right-click option opens the Request Chart-Out window. For information on the Request Chart-Out window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Request Chart-Out Window</em> on page 143.</td>
</tr>
<tr>
<td>Patient Recalls</td>
<td>This right-click option opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Patient Recalls Window</em> on page 120.</td>
</tr>
<tr>
<td>Appointment Treatments</td>
<td>This right-click option opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see <em>Appointment Treatments Window</em> on page 8.</td>
</tr>
<tr>
<td>Notes</td>
<td>This right-click option opens the Appointment Notes window. For information on the Appointment Notes window, see <em>Appointment Notes Window</em> on page 40.</td>
</tr>
<tr>
<td>Add to Wait List</td>
<td>This right-click option opens the Add to Wait List window. For information on the Add to Wait List window, see <em>Add to Wait List Window</em> on page 6.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Clicking this button does one of the following:</td>
</tr>
<tr>
<td></td>
<td>• If the ‘Make Appt button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm books the appointment.</td>
</tr>
<tr>
<td></td>
<td>• If the ‘Make Appt button will schedule automatically at time selected checkbox is selected in the Appointment Expert Options window’s Appointments section, axiUm changes the highlighted item in the list view to a hovering appointment block.</td>
</tr>
<tr>
<td></td>
<td>For information on the Appointment Expert Options window’s Appointments section, see <em>Appointments Section</em> on page 23.</td>
</tr>
<tr>
<td>Edit</td>
<td>This right-click option opens the Edit Appointment window. For information on the Edit Appointment window, see <em>Edit Appointment Window</em> on page 59.</td>
</tr>
<tr>
<td>Cancel</td>
<td>This right-click option cancels the selected appointment. A cancelled appointment is one that either the patient or the provider does not want to attend at this time.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Cancellation window. For information on the Cancellation window, see <em>Cancellation Window</em> on page 54.</td>
</tr>
</tbody>
</table>
**Scheduler Window - Pending Tab**

<table>
<thead>
<tr>
<th>Delete</th>
<th>This right-click option removes the highlighted item from the Availability tab’s Active tab. It also removes the appointment time block from the Scheduler window’s Active tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wait</td>
<td>This column heading indicates whether a pending appointment exists on the wait list.</td>
</tr>
</tbody>
</table>

48.5 Scheduler Window - Weekly Tab

You can access this window by going to the Scheduler window and clicking the Weekly tab. For information on the Scheduler window, see *Scheduler Window* on page 121.

This tab displays the selected appointment book in weekly layout.
### Scheduler Window - Weekly Tab

<table>
<thead>
<tr>
<th><strong>Appointment Block Colors</strong></th>
<th>Time block statuses are indicated by the following background colors:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Grey: Not available for booking appointments. When a patient has been checked out the appointment box displays grey text.</td>
</tr>
<tr>
<td></td>
<td>• Yellow: Available for making appointments.</td>
</tr>
<tr>
<td></td>
<td>• White or custom color blocks: Appointments. The appointment block can be customized to show up to five lines of data about the patient appointment. The appointment background color can also be customized in the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 796.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Appointment Text Colors</strong></th>
<th>Appointment statuses are indicated by the following text colors:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Green: Appointment is unconfirmed.</td>
</tr>
<tr>
<td></td>
<td>• Blue: Appointment is confirmed.</td>
</tr>
<tr>
<td></td>
<td>• Red: Patient has been checked in.</td>
</tr>
<tr>
<td></td>
<td>• Black: The patient is seated.</td>
</tr>
</tbody>
</table>

| **Vertical Bars** | The colored vertical bar at the left side of the appointment box is the provider's schedule color, as indicated in the Schedule Color field of the Users window’s Provider tab’s Scheduler section. For information on the Provider tab’s Scheduler section, refer to the axiUm Reference Manual for Maintenance and see Scheduler Section on page 514. |

<table>
<thead>
<tr>
<th><strong>Appointment Indicators</strong></th>
<th>An A in the right bottom corner of the appointment time block indicates that the patient has an alert. There are two types of alerts, indicated by color:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Red: A medical alert</td>
</tr>
<tr>
<td></td>
<td>• Green A patient alert</td>
</tr>
</tbody>
</table>

Additional indicators can be displayed. These additional indicators are used in conjunction with the Appointment Indicators to Display window. For information on the Appointment Indicators to Display window, refer to the axiUm Reference Manual for Maintenance and see Appointment Indicators to Display Window on page 807.

<table>
<thead>
<tr>
<th><strong>Vertical Column Bars</strong></th>
<th>The vertical bar (the additional fixed column next to each column) indicates the different types of provider time, and displays the following colors:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Green: Single booking</td>
</tr>
<tr>
<td></td>
<td>• Red: Multiple bookings</td>
</tr>
<tr>
<td></td>
<td>• Gray: Unavailable, non-clinic time (e.g., lunch break)</td>
</tr>
</tbody>
</table>

This feature works in conjunction with the Show Provider Time Column for Current Provider checkbox in the Scheduler Options window’s Options section. For information on the Scheduler Options window’s Options section, refer to the axiUm Reference Manual for Maintenance and see Options Section on page 799.
<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Non-Clinic Time...</td>
<td>This right-click option opens the Add Provider Non-Clinic Times window. For information on the Add Provider Non-Clinic Times window, see Add Provider Non-Clinic Times Window on page 2.</td>
</tr>
<tr>
<td>Edit Non-Clinic Time...</td>
<td>This right-click option opens the Edit Provider Non-Clinic Times window for editing the selected non-clinic time. For information on the Edit Provider Non-Clinic Time window, see Edit Provider Non-Clinic Times Window on page 73.</td>
</tr>
<tr>
<td>Delete Non-Clinic Time...</td>
<td>This right-click option deletes the selected non-clinic time.</td>
</tr>
<tr>
<td>Edit Clinic Time Description...</td>
<td>This right-click option opens the Edit Clinic Time Description window. You can manually enter a description instead of selecting from the predefined list.</td>
</tr>
<tr>
<td></td>
<td>axiUm displays the clinic time description at the start of the chair reservation using the color defined in the Default Color field of the Clinic Time Reasons window. Manually entered descriptions are displayed in yellow.</td>
</tr>
<tr>
<td></td>
<td>For information on the Edit Clinic Time Description window, see Edit Clinic Time Description Window on page 66.</td>
</tr>
<tr>
<td>Reassign Appointments...</td>
<td>This right-click option opens the Reassign Appointments window. For information on the Reassign Appointments window, see Reassign Appointments Window on page 108.</td>
</tr>
<tr>
<td>Fill from Wait List...</td>
<td>This right-click option opens the Appointment Lists window. For information on the Appointment Lists window, see Appointment Lists Window on page 28.</td>
</tr>
<tr>
<td>Make Appt Request...</td>
<td>This right-click option is used for making appointment requests. Selecting this right-click option displays the Rolodex (Select Patient) window to select from. For information on the Rolodex (Select Patient) window, see Rolodex (Select Patient) Window on page 112.</td>
</tr>
<tr>
<td>Patient Card...</td>
<td>This right-click option opens the Patient Card window with information about the currently selected patient.</td>
</tr>
<tr>
<td></td>
<td>For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Card Window on page 55.</td>
</tr>
<tr>
<td>Select Patient</td>
<td>This right-click option makes the patient in the highlighted item in the list view the active patient. When a patient becomes active, their information is displayed in the axiUm taskbar.</td>
</tr>
<tr>
<td>Show History...</td>
<td>This right-click option opens the Appointment History window. For information on the Appointment History window, see Appointment History Window on page 25.</td>
</tr>
<tr>
<td>Dial Patient</td>
<td>This right-click option will dial the patient's phone number to a phone connected to the current workstation.</td>
</tr>
<tr>
<td>Patient Approvals</td>
<td>This right-click option opens the Patient Approvals window. For information on the Patient Approvals window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Approvals Window on page 53.</td>
</tr>
<tr>
<td>Patient Check In</td>
<td>This right-click option indicates that the patient has been checked into the clinic. Checked in patients are indicated on the appointment block in red text.</td>
</tr>
</tbody>
</table>
**Scheduler Window - Weekly Tab**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Undo Patient Check In</strong></td>
<td>This right-click option is enabled if the Check In right-click option was selected. If the Patient Check In right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td><strong>Patient Check Out</strong></td>
<td>This right-click option is enabled if the Patient Check In right-click option was selected. This right-click option indicates that the patient has been checked out of the clinic. Checked in patients are indicated on the appointment block in gray text.</td>
</tr>
<tr>
<td><strong>Patient Check In Form</strong></td>
<td>This right-click option opens the Patient Check In Form.</td>
</tr>
<tr>
<td><strong>Patient Seated</strong></td>
<td>This right-click option is enabled if the patient Check In option was selected. This right-click option sets the appointment status to patient seated. This is visually indicated in the Active tab by black text in the appointment box. This option is only available if the patient is already checked in.</td>
</tr>
<tr>
<td><strong>Undo Patient Seated</strong></td>
<td>This right-click option is enabled if the Patient Seated right-click option was selected. If the Patient Seated right-click option was selected in error, this right-click option will reverse the action.</td>
</tr>
<tr>
<td><strong>Chart Request</strong></td>
<td>This right-click option opens the Request Chart-Out window. For information on the Request Chart-Out window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Request Chart-Out Window on page 143.</td>
</tr>
<tr>
<td><strong>Patient Recalls</strong></td>
<td>This right-click option opens the Patient Recalls window. For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Recalls Window on page 120.</td>
</tr>
<tr>
<td><strong>Appointment Treatments</strong></td>
<td>This right-click option opens the Appointment Treatments window. For information on the Appointment Treatments window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Appointment Treatments Window on page 8.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>This right-click option opens the Appointment Notes window. For information on the Appointment Notes window, see Appointment Notes Window on page 40.</td>
</tr>
<tr>
<td><strong>Reschedule</strong></td>
<td>This right-click option changes the selected scheduled appointment block into a hovering appointment block.</td>
</tr>
<tr>
<td><strong>Confirm</strong></td>
<td>This right-click option confirms the selected appointment. Confirmed appointments are displayed in blue text.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>This right-click option opens the Edit Appointment window. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>This right-click option cancels the selected appointment. A cancelled appointment is one that either the patient or the provider does not want to attend at this time. This right-click option opens the Cancellation window. For information on the Cancellation window, see Cancellation Window on page 54.</td>
</tr>
</tbody>
</table>
**SCHEDULER WINDOW - WEEKLY TAB**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Failed</strong></td>
<td>This right-click option indicates that either the patient or the provider failed to arrive at their appointment.</td>
</tr>
<tr>
<td></td>
<td>A failed appointment is one that either the patient did not attend and did not provide notice for. They did not cancel and did not show up.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>This right-click option removes the appointment from the Active tab.</td>
</tr>
<tr>
<td><strong>Edit X-Ray Info</strong></td>
<td>This right-click option is enabled if the selected appointment is for a hygiene-type appointment code.</td>
</tr>
<tr>
<td></td>
<td>If the appointment is for today or in the future, this right-click option opens the X-Ray Information window.</td>
</tr>
<tr>
<td></td>
<td>If the appointment was in the past and the X-Rays Taken checkbox was deselected in the X-Ray Information window, you cannot open that X-Ray Information window.</td>
</tr>
<tr>
<td></td>
<td>For information on the X-Ray Information window, see X-Ray Information Window on page 152.</td>
</tr>
<tr>
<td><strong>Next appointment...</strong></td>
<td>If the patient has another appointment in the future, this right-click option opens the Edit Appointment window for the patient's next appointment. For information on the Edit Appointment window, see Edit Appointment Window on page 59.</td>
</tr>
<tr>
<td></td>
<td>If the patient does not have another appointment, axiUm notifies you that the patient does not have another appointment and asks if you would like to add a new one.</td>
</tr>
<tr>
<td><strong>Make Appointment...</strong></td>
<td>This right-click option opens the New Appointment window. For information on the New Appointment window, see New Appointment Window on page 88.</td>
</tr>
<tr>
<td><strong>Patient Appointments</strong></td>
<td>This right-click option is available if the Mode drop-down field displays the Patient option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Patient Appointments window. For information on the Patient Appointments window, see Patient Appointments Window on page 100.</td>
</tr>
<tr>
<td><strong>Family Appointments</strong></td>
<td>This right-click option is available if the Mode drop-down field displays the Family option in the Scheduler Options window's Patient/Family Appointments Window section. For information on the Scheduler Options window's Patient/Family Appointments Window section, refer to the axiUm Reference Manual for Maintenance and see Patient/Family Appointments Window Section on page 804.</td>
</tr>
<tr>
<td></td>
<td>This right-click option opens the Family Appointments window. For information on the Family Appointments window, see Family Appointments Window on page 79.</td>
</tr>
<tr>
<td><strong>Print Appt Form</strong></td>
<td>This right-click option opens the Print Appointment Options window. For information on the Print Appointment Options window, see Print Appointment Options Window on page 107.</td>
</tr>
</tbody>
</table>
48.6 Scheduler Window - Monthly Tab

You can access this window by going to the Scheduler window and clicking the Monthly tab. For information on the Scheduler window, see Scheduler Window on page 121.

This tab displays the full month at a glance. Clicking on a date will take you to the Active tab for the selected date.

49 Scheduler Options Window

For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 796.

50 Select a Patient Window

axiUm displays this window when you:

- Click the Make New button on the Family Appointments window.
- Click the New Planned button on the Family Appointments window.

For information on the Family Appointments window, see Family Appointments Window on page 79.

Use this window to select a family member for whom you want to make an appointment.
Session Layout Window

You can access this window by going to the Discipline/Group Layout window and clicking (Session Layout). For information on the Discipline/Group Layout window, see Discipline/Group Layout Window on page 57.

Use this window to stamp the names of disciplines, user groups, and instructors onto chairs in a clinic for a session and date range.
**SESSION LAYOUT WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>This disabled field indicates the name of the session, as entered in the Description field of the Discipline/Group Layout window. For information on the Discipline/Group Layout window, see Discipline/Group Layout Window on page 57.</td>
</tr>
<tr>
<td><strong>Discipline</strong></td>
<td>This drop-down field indicates the discipline selected for this session's layout. The options in this drop-down field are defined in the Discipline Codes window. For information on the Discipline Codes window, refer to the axiUm Reference Manual for Maintenance and see Discipline Codes Window on page 228.</td>
</tr>
<tr>
<td><strong>Group</strong></td>
<td>This drop-down field indicates the provider group selected for this session's layout. 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.</td>
</tr>
</tbody>
</table>
### SESSION LAYOUT WINDOW

**Inst. / User**

This disabled field indicates the name of the instructor assigned to this session layout. Clicking the ellipsis opens the *Users List* window to select from. For information on the *Users List* window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Users List Window* on page 166.

**Modify Record**

Clicking this icon saves any modifications you made to the item selected from the list view.

**Delete Record**

Clicking this icon permanently deletes the item selected from the list view.

---

## 52 Wait List History Window

You can access this window by:

- Going to the Appointment Lists window’s Wait List tab, highlighting a record in the list view, and then selecting the Show Wait List History right-click option.

- Going to the Appointment History window and clicking the Wait History button. For information on the Appointment History window, see *Appointment History Window* on page 25.

- Going to the Edit Wait List Details window and clicking the History button. For information on the Edit Wait List Details window, see *Edit Wait List Details Window* on page 77.

A historic list of records is available in the list view. Selecting an item from the list view displays the details in the window’s fields. Because this is a historic record, all fields in this window are read-only.
**Wait List History Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This disabled field indicates the selected patient's name and chart number.</td>
</tr>
<tr>
<td>Clinic</td>
<td>This disabled drop-down field indicates the clinic associated to the highlighted item in the list view.</td>
</tr>
<tr>
<td>Reason</td>
<td>This disabled drop-down field indicates the reason for placing the selected patient on the wait list.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field is for internal purposes and indicates a numeric ranking of an appointment's importance that can be used to make cancellation decisions when chairs are limited. This field defaults to the value indicated in the Default Priority field of the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 816.</td>
</tr>
<tr>
<td>Note</td>
<td>This text box indicates any free-form notes associated to this appointment in the wait list.</td>
</tr>
<tr>
<td>Close</td>
<td>Clicking this button closes the Wait List History window.</td>
</tr>
</tbody>
</table>
53 X-Ray Information Window

You can access this window by:

- Going to the Scheduler window’s Active tab, highlighting a booked appointment block, and selecting the Edit X-Ray Info right-click option. For information on the Scheduler window’s Active tab, see *Scheduler Window - Active Tab* on page 128.

- Going to the Scheduler window’s Weekly tab, highlighting a booked appointment block, and selecting the Edit X-Ray Info right-click option. For information on the Scheduler window’s Weekly tab, see *Scheduler Window - Weekly Tab* on page 142.

- Going to the Appointment Lists window’s Appointment tab, highlighting an appointment from the list view (of code type Recall), and selecting the Edit X-Ray Info right-click option. For information on the Appointment Lists window’s Appointment tab, see *Appointment Lists Window - Appointments Tab* on page 31.

X-ray technicians can use this window to add details about X-rays taken for the selected patient. Other providers can use this window to view those X-rays and details.

![X-Ray Information Window](image)

**X-RAY INFORMATION WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td>This drop-down field indicates the Preventive Care code that is of type X-Ray. The options in this drop-down field are defined in the <em>Preventive Care Codes</em> window. For information on the <em>Preventive Care Codes</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Preventive Care Codes Window</em> on page 598.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>This drop-down field indicates the date the X-rays were taken.</td>
</tr>
</tbody>
</table>
| **BW** | This section is enabled if the Code drop-down field displays an option. This section indicates the bitewings:  
  - Right molar  
  - Right premolar  
  - Left premolar  
  - Left molar |
### X-Ray Information Window

**PA#**  
This field is enabled if the Code drop-down field displays an option.  
This field indicates the periapical number.

**Pan**  
This checkbox is enabled if the Code drop-down field displays an option.  
This checkbox, if selected, indicates that a panorex X-ray was taken.

**Ceph**  
This checkbox is enabled if the Code drop-down field displays an option.  
This checkbox, if selected, indicates that a cephalometric X-ray was taken.

**FMX**  
This checkbox is enabled if the Code drop-down field displays an option.  
This checkbox, if selected, indicates that a full mouth survey (X-ray) was taken.

**Other**  
This field indicate any other types of X-ray analysis taken.

**Note**  
This text box indicates any free-form notes associated to this X-ray.

**Exposures**  
This button is enabled if the Code drop-down field displays an option.  
Clicking this button opens the Patient Exposures window. For information on the Patient Exposures window, refer to the axiUm Reference Manual for EHR and see Patient Exposures Window on page 114.

**X-Rays Taken**  
This checkbox, if selected, indicates that X-rays have been taken.

**OK**  
Clicking this button saves the entries and closes the X-Ray Information window.

**Cancel**  
Clicking this button cancels the entries and closes the Academic Cancellation window.