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**axiUm Release 5.11.04**

**Chart Tracker**

- 131904 - User names containing apostrophes cause SQL error

**EDI Claims**

- 131526 - Claim form does not default the billing number qualifier

**EHR**

- 131482 - Refresh issue
- 131551 - Scanned images are missing
- 131638 - Display issue
- 131786 - Problem with display of Medications/Prescriptions option
- 131789 - List view sorts incorrectly
- 131884 - Refreshing causes blank field

**Modified: 30-Nov-12**
131967 - Rx printing causes crash
131452 - Treatment-based questions are missing

General
102050 - Failed launch displays no explanation

Maintenance
131654 - Options are misaligned
131944 - Misleading checkbox name

Patient Card
131632 - Deleting patient retains their internet access account

Power Admin
130601 - Lost the ability to copy user level
131907 - Incorrect ID and field ID pointing to checkbox

Scheduler
130510 - Creating appointment request submits chart request
132102 - appoint.rpt is missing appointments tied to treatment

Transactions
131484 - Blank fields in claim forms

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EHR
129703 - axiUm appears to hang
132464 - Window disregards approver’s Power Admin rights
132809 - Cumulative evaluation from previous grades

General
132731 - Missing character in IPORTAL_PKG.sql
132852 - Problem with PAYPLAN_BAL_PKG.PP_OPEN_BAL

Info Manager
132184 - Overdue Extensions report causes SQL error
132789 - Missing category

Maintenance
132297 - Problems merging patient charts
132735 - Drop-down field does not save your selection
132911 - Printing claims with EOBs prompts for printer twice

Patient Attachments
132103 - Need the ability to troubleshoot empty consent files

Personal Planner
132381 - Closing the Edit Form Information window causes crash

Power Admin
132182 - The Eligibility button is missing
132461 - Template Notes not obeying Power Admin settings

Scheduler
132467 - Right-clicking on appointment block causes crash
132489 - Display problem with clinic holidays

Transactions
131855 - Allocating prepayments causes incorrect total
132139 - Patient payment record is hidden when it should display
132377 - Deleting payment plans causing problems
132815 - Insurance transfers to patient shows incorrectly
132905 - Clicking the Payment tab freezes axiUm
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Chart Tracker

124889 - Rescheduling appointments create no chart request
Module: Chart Tracking - Chart Request tab
Problem: This problem occurs if the Appointment Expert Options window (in Scheduler module - Chart Tracking - Chart Request tab) has the 'Make Appts' button will schedule automatically at time selected checkbox selected. Then when you use the Appointment Expert window to reschedule an existing active appointment to a future active appointment, axiUm deletes the current chart request, and this is fine. However, axiUm creates no chart request for the future appointment.
Solution: Fixed so that in the above scenario, axiUm auto-creates a chart request for the future appointment.

126360 - Uppercase letters in chart numbers display as lowercase
Module: Chart Tracking - Chart History tab, User History tab
Problem: When you check out a chart and the chart number begins with an uppercase letter (e.g. T41), and in the Chart Out window's Chart # Input field you enter the lowercase equivalent (i.e. t41), axiUm checks out the chart as T41, and this is fine. However, in the Chart History tab and the User History tab, axiUm displays the lowercase you entered (i.e. t41).
Solution: Fixed so that in the above scenario, axiUm displays uppercase.

Dispensary

125579 - Field entry required on inactive field
Module: Dispensary ~ Sterilize Kits window
Problem: In the Sterilize Kits window, entering the Kit field displays a message indicating that an outer bar code is required even though the Outer Code field is disabled and you cannot enter anything.

Setup:

1. Open the Dispensary Setup window.
   Go to Dispensary module - Setup button.
2. In the System Options section, make sure the following checkboxes are indicated:
   - Sterilization adds outer bar codes: selected
   - Outer bar codes generated from this application: selected
   - Use kit type defaults for sterilization periods: deselected

3. Click the OK button to save the changes, close the Dispensary Setup window, and return to the Dispensary module:

Steps to replicate:

1. From the Dispensary module, click the Sterilize button to display the Sterilize Kits window.

2. In the Kit field, enter the kit code.

3. Press ENTER. Do not click the Replace button.
   axiUrn displays an error message indicating that the expiry date must be in the future, and this is fine.
4. Click the OK button to close the error message.

5. In the Expiry Date field, enter a future date.

6. Return to the Kit field and press ENTER again.
   
   axiUm displays an error message indicating that an outer bar code must be entered although the Outer Code field is disabled and you cannot enter anything.

Solution: Fixed so that in the above scenario, axiUm displays the Replace Kit Instrument window instead of the error message.

125570 - Message is cut off in window

Module: Dispensary ~ Check Out Wrong Location Warning window

Problem: When a dispensary item has its last dispensary location set to a location with a long description, and you submit a dispensary request for another location, axiUm displays the Check Out Wrong Location Warning window, and this is fine. However, due to the long description, the text wraps onto a third line, causing the text to be cut off.

Solution: Fixed so that the entire message displays in the window.
126437 - Select Printer window displays when it should not

**Module**: Dispensary ~ Sterilize Kits window

**Problem**: If you have the Dispensary module set up to print no outer barcodes, and you sterilize a kit, axiUm still displays the Select Printer window (used to print outer barcodes).

**Solution**: Fixed so that in the above scenario, axiUm no longer displays the Select Printer window.

---

126488 - Checking out kit causes crash

**Module**: Dispensary ~ Check Out window

**Problem**: If you select a kit with:

- A kit type description greater than 32 characters (as defined in Maintenance module - Dispensary tab - Kit Types icon - Kit Type Codes window - Description field).
- An instrument in the kit that has reached its life cycle (as defined in Maintenance module - Dispensary tab - Instruments icon - Instrument Codes window - Life Cycle field).

Then when you check out this kit, axiUm crashes.

**Solution**: Fixed so that in the above scenario, axiUm no longer crashes.

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**EDI Claims**

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123710 - 837 Dental Version 5010 changes for Emdeon

**Module**: EDI Claims ~ EDI Claims window

**Problem**: 837 Dental Version 5010 claims are not formatted according to the Emdeon CT Dental Supplemental Filing Guidelines document. The following formatting problems are causing insurance companies to reject claims:

- REF*G5*Site ID: axiUm has a station option to control whether the Site ID is included with 5010 claims, but is turned off by default. Need this turned on by default.
- Insured Demographics Information: axiUm currently has no ability to send this DMG loop 2320 for the 5010 format. Need to forward this information.
- Patient Student Status: axiUm currently has no ability to send the student status code for the 5010 format. Need to forward this information.

**Solution:** Fixed the above three items:
- REF*G5*Site ID: axiUm has this turned on by default (except NYM claims).
- Insured Demographics Information: axiUm now forwards this information.
- Patient Student Status: axiUm now forwards this information.

---

**124501 - 835 Remittance Report issues**

**Module:** EDI Claims ~ EDI Claims window

**Problem:** There are two problems:
- The adjustment column in the second page is for provider adjustment, not claim adjustment.
- If the group code does not match, axiUm excludes the adjustment reason description.

**Solution:**
- Rename the Adjustment column to Provider Adjustment column
- If the group code does not match, axiUm ignores it.

---

**124625 - NY Medicaid 5010 claims are rejected**

**Module:** EDI Claims ~ EDI Claims window

**Problem:** Sometimes, axiUm rejects EDI 5010 NY Medicaid claims because the claim omits the patient's other insurances. axiUm sends the Medicaid policy plus one other insurance, not all other insurances.

Note: Other insurances refer to those in Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List - run a search - (Edit Record) - Insurance Company window - Advanced button - Insurance Company Advanced Options window, where the **Does not cover Medicaid claims/services** checkbox is selected.

**Solution:** Fixed so that in the above scenario, all other policies are displayed in the EDI file as SBR segments.

---

**126167 - NY Medicaid causing claim rejections**

**Module:** EDI Claims ~ EDI Claims window

**Problem:** NY Medicaid EDI claim formatting is different based on whether or not the Print Customary Total on Claim checkbox was on (found in Insurance Company setup), which is incorrect and causes issues for In Process billing.

**Solution:** Fixed so that for APG insurance, the claim formatting will now print the treatment amount on the individual treatment line and will add the amount from the rate code line into the
first treatment total. The amounts will vary between Medicaid Fees and Office Fees, depending on if the Print Customary Total on Claim checkbox is set.

126292 - Cannot find voided NY Medicaid claims
Module: EDI Claims ~ EDI Claims window
Problem: If you void a NY Medicaid claim (by going to EDI Claims window - Submitted Procedures tab - Void Claim right-click option - Void Claim window), axiUm moves the claim record to the Unsubmitted Procedures tab, and this is fine. However, if you batch the claim and EDI rejects it, you must resend it, but you can no longer find the claim record. The voided claim is missing from the Submitted Procedures tab.
Solution: Fixed so that axiUm shows the void claim in the Submitted tab.

126417 - CLAIM.Status < 0
Module: EDI Claims ~ EDI Claims window
Problem: Sometimes when an EDI batch is modified, axiUm updates the CLAIM.Status field incorrectly, creating negative values in the claim status.
Solution: Fixed.

126436 - Duplicate records in CLAIMH & CLAIMITH tables
Module: EDI Claims ~ EDI Claims window
Problem: When you submit an EDI claim, axiUm creates one record in the Claim Submission History window (in Transactions module - Treatment tab - Claim Submission History right-click option) but creates two records in the CLAIMH table and the CLAIMITH table.
Solution: Fixed so that in the above scenario, axiUm creates only one record in the CLAIMH table and the CLAIMITH table.

126845 - Date column is unclear
Module: EDI Claims ~ EDI Claims window
Problem: In the submitted tab, the Date column does not specify whether it refers to the claim date or the treatment date.
Solution: Renamed the column heading from Date to Trx Date.
126920 - Record checkboxes are not auto-selected

**Module:** EDI Claims ~ EDI Claims window

**Problem:** If you go to the Unsubmitted tab’s list view and highlight erroneous records (i.e. those in red text indicating missing overdue claim reasons), and enter a delay reason for it, axiUm updates these records to indicate they are now correct (i.e. black text indicates they have a claim reason), and this is fine. However, none of these records are selected (i.e. check box is selected).

**Solution:** Fixed so that in the above scenario, axiUm selects the checkbox next to the records.

126995 - Incorrect warning message (1)

**Module:** EDI Claims ~ EDI Claims window

**Problem:** When you enter a delay reason for one of many treatment records on the same claim, and some of these other treatment records already contain a delay reason, axiUm displays the Enter Delay Reason Code window. In this case, axiUm should display the Existing Delay Reason Warning window to warn you that some records already contain a delay reason, and to give you the option to overwrite them.

**Solution:** Now in the above scenario, axiUm displays the Existing Delay Reason Warning window.

127007 - Incorrect warning message (2)

**Module:** EDI Claims ~ EDI Claims window

**Problem:** In the Unsubmitted Procedures tab, if you add insurance companies to the Exclude field, and then you go to the Submitted Procedures tab and add one of the same insurance companies to the Include field, axiUm displays a message indicating the same insurance company is already in the exclude list. This is confusing because there is no Exclude field on the Submitted tab.

Steps to replicate:
1. Go to the EDI Claims window's Unsubmitted Procedures tab. 
   Note that this tab displays both the Include ins. field and the Exclude ins. field.

2. In the Exclude ins. field, add some insurance companies. For our example, we will add the following:
   - BCTX, Blue Cross Blue Shield of Texas
   - GWL, Great West Health and Dental Benefits
   - UNCON, United Concordia

3. Click on the Submitted Procedures tab.
   Note that this tab displays only the Include ins. field.
4. In the **Include ins.** field, add some insurance companies. For our example, we will add BCTX, Blue Cross Blue Shield of Texas.

   axiUm displays the Include Insurance Company warning window indicating that this insurance company exists in the Exclude list, and asks if you want to add it to the Include list. However, there is no **Exclude ins.** field in the Submitted Procedures tab, so this message is confusing.

   **Solution:** The warning is correct, because you are likely to retain the search criteria, but it now indicates that the Exclude list is on the Unsubmitted Procedures tab.

---

**127162 - Problems with re-batch records**

**Module:** EDI Claims ~ EDI Claims window

**Problem:** There are two problems with the Unsubmitted tab’s **Show Rebatch claims only** checkbox:

- When you rebatch a claim in the Submitted tab and you go to the Unsubmitted tab, axiUm should select this checkbox by default, but is not.
- When you deselect this checkbox and run a search, axiUm should display the Rebatch column heading that displays either Y or blank.

**Solution:** Fixed the above two problems
127247 - Re-batched treatment records display incorrectly

**Module**: EDI Claims ~ EDI Claims window

**Problem**: If you submit a multi-treatment claim, and you re-batch one treatment from that claim, and then you go to the Unsubmitted tab, the following occurs:

1. When axiUm auto-selects the **Show Rebatched claims only** checkbox, and you run a search, axiUm displays only the one treatment record that you re-batched. axiUm should display all treatment records from the same claim.

2. Then when you manually deselect the **Show Rebatched claims only** checkbox, and run a search again, axiUm displays all treatment records that you re-batched, and this is fine. However, the one treatment record you re-batched has the Rebatch column displaying Y while all other treatment records from the same claim show blank, and these should display Y.

Note: This is only a display issue. On the screen, axiUm indicates the one treatment you selected to re-batch. In the background, axiUm correctly re-batches all treatments from the same claim.

**Solution**: Fixed so that in the above scenarios:

1. axiUm displays all treatment records from the same claim.
2. All treatment records from the same claim have the Rebatch column displaying Y.

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**EHR**

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105397 - Duplicate treatment records (1)

**Module**: EHR ~ Patient Approvals window

**Problem**: Sometimes, if you select an in-process treatment that was re-billed at $0 and you complete this treatment, opening the Patient Approvals window displays duplicate treatment records.

**Solution**: Fixed so that in the above scenario, axiUm displays only one treatment record.

---

111995 - Duplicate treatment records (2)

**Module**: EHR ~ Patient Approvals window

**Problem**: This problem occurs if you go to the EHR module, create a treatment record, receive approval for it, and you go to the Transactions module to complete it and re-bill it, and then you return to the EHR module to make additional changes. Then when you open the Patient Approvals window, axiUm displays duplicate treatment records.

**Solution**: Fixed so that in the above scenario, axiUm displays only one treatment record.
**123948 - Quotation marks on supplement code causes error**

**Module:** EHR ~ Lab Order Form report  

**Problem:** If a lab order record contains a supplement code, and this supplement code contains quotation marks (""), you cannot view the Lab Order Form report.

**Steps to replicate:**

1. Go to the EHR window’s Labs tab.
2. Click (Create a new Record). axiUm displays the Add Lab Order window.
3. Enter the fields and click the OK button. axiUm closes the Add lab Order window and displays the Lab Order Details window.
4. In the Details field, enter text and click (Add a new Record). This enables the Supplements field.
5. In the Supplements field, enter a supplement code containing quotation marks (e.g. “casts”).
6. Click (close). axiUm closes the Lab Order Details window and returns to the EHR module’s Lab tab.
7. From the list view, highlight the lab record and click (Preview Report). axiUm displays the Crystal Report Windows Forms Viewer window indicating that an error occurred, instead of the Lab Order Form report.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the Crystal Report Windows Forms Viewer window and displays the Lab Order Form report.

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**124085 - Duplicate note records**

**Module:** EHR - Tx History tab

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5.11 Bug Fixes  
Modified: 30-Nov-12  
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Problem: If user1 on workstation1 edits a note (e.g. general note), and user2 on workstation2 edits the same note, and then both users receive approval for it, axiUm displays duplicate note records in the list view.

Solution: Fixed so that in the above scenario, axiUm approves the changes made by user1. When user2 tries to receive approval, axiUm displays the message, “This note has been modified by another user and cannot be updated.” Only one note record is displayed in the list view.

124284 - Printing treatment plan letters displays error message

Module: EHR - Tx Plan tab

Problem: Sometimes, printing treatment plan letters causes axiUm to display an error message.

Setup:

1. Open the Station Options window.
   Go to Maintenance module - System tab - Station Options icon.

2. Go to General section - Report section - Engine item.

3. In the Default field, enter 1 (CRPE Engine).

4. Click (Modify Record).
Steps to replicate:

1. Go to the EHR module - Tx Plan tab - Patient Acceptance tab.
2. Click the Letters button to display the Treatment Plan Letters window.

![Treatment Plan Letters Window](image)

3. Select a letter (e.g. Patient Letter).
4. Click the OK button.
   
   axiUm displays an error message.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays an error message.

---

**124659 - Highlighting no record enables Edit Record icon**

**Module:** EHR - Medications tab

**Problem:** If you go to the list view and highlight no record, axiUm still enables (Edit Record).

**Solution:** Fixed so that in the above scenario, (Edit Record) is disabled.

---

**124776 - Duplicate diagnosis codes displayed**

**Module:** EHR - Tx Plan tab

**Problem:** When you create a diagnosis category1, then a diagnosis code within category1, and then a diagnosis sub-category within category1, axiUm displays duplicate diagnosis codes in the EHR module.

**Setup:**

1. Open the Diagnostic Categories window.
   
   Go to Maintenance module - Clinical tab - Diagnostic Categories icon.
2. Click (Clear Data). axiUm clears the fields.

3. Enter the fields:
   - Code: Z3000
   - Description: X-Ray

4. Click (Add a new Record).
   axiUm saves the entries and displays the new record in the list view.

5. Click (close).
   axiUm closes the Diagnostic Categories window and returns to the Maintenance module.

6. Open the Clinical Diagnosis Code window.
   Go to Maintenance module - Clinical tab - Clinical Diagnosis Codes icon - Clinical Diagnosis List window - (Create a new Record).

7. Enter the fields and options.
   - Category: From the drop-down field, select X-Ray.
   - Code: Z3000
   - Description: X-Ray
8. Click the OK button.

axiUm saves the entries, closes the Clinical Diagnosis Code window, and returns to the Clinical Diagnosis List window.

9. Open the Diagnostic Categories window again.

10. Highlight the record Z3000, X-Ray.
11. Click \( \text{info} \) (Subcategories).
   axiUm displays the Diagnostic Subcategories window.

12. Enter the fields:
   - Subcategory: FullX
   - Description: Full X-Ray

13. Click \( \text{file} \) (Add a new Record).
   axiUm saves the entries and displays the new record in the list view.

14. Click \( \text{close} \) (close).
   axiUm closes the Diagnostic Categories window and returns to the Maintenance module.

Steps to replicate:

1. Go to the EHR module - Tx Plan tab - Diagnosis tab - Add/Update Diagnosis button - Select Clinical Diagnoses Code window - Full List tab.

2. Select the category you created.
   axiUm displays duplicate diagnosis codes.
Solution: Fixed so that in the above scenario, the diagnosis category displays only once.

124786 - Selecting Undefined Drug checkbox retains field values

Module: EHR - Medications tab

Problem: When you change the definition of a medication from an existing drug to an undefined drug, axiUm does not clear the associated fields.

Steps to replicate:

1. Open the Patient Medication Entry window.
   - Go to EHR module - Medications tab - (Create a new Record) - Existing Medication option

2. Enter the fields and options. For our example, we will enter the following:
   - Drug: Benadryl elixir
   - Start Date: 15/03/2012
   - End Date: 15/04/2012
3. Click the OK button. axiUm saves the entries, closes the Patient Medication Entry window, and returns to the EHR window.

4. From the list view, double-click on the record you just created. axiUm displays the Edit Patient Medication window.

5. Enter the fields and options. For our example we will enter:
   - Undefined Drug: Select this checkbox.
   - Drug: Enter new text that does not exist in the Drug Definition List window (e.g. Benylin)

   Problem 1: axiUm retains the previous values for the Dosage drop-down field, the Start Date field, and the End Date field.
6. Go to the Frequency field and click (ellipsis). axiUm displays the Drug dose Frequencies window.

   Problem 2: The Drug is the drug that you originally selected (i.e. Benadryl elixir), not the newly entered drug (i.e. Benylin).

7. Click (close). axiUm closes the Drug Dose Frequencies window and returns to the Edit Patient Medication window.

8. Click the OK button. axiUm closes the Edit Patient Medication window and returns to the EHR module.


   Problem 3: The Undefined Drug checkbox you selected is now deselected, although the Drug field indicates the name of the undefined drug you entered.
Solution: Fixed so that when you select the Undefined Drug checkbox, axiUm clears all the fields. This resolves all three problems identified above.

---

124893 - Can select drug frequency without drug dosage specified

**Module:** EHR ~ Patient Prescription Entry window, Patient Medication Entry window

**Problem:** In the following windows:

- **Patient Prescription Entry window**
  - Go to EHR module - Medication tab - (Create a new Record) - New Prescription option
- **Patient Medication Entry window**
  - Go to EHR module - Medication tab - (Create a new Record) - Existing Medication option

If you select an option in the Drug drop-down field but nothing in the Dosage drop-down field, the Frequency field (ellipsis) is enabled and you can select a dosage. Without a dosage, you should be unable to specify its frequency.

**Solution:** Fixed so that the Dosage drop-down field must display an option before axiUm enables the Frequency field (ellipsis).

---

125053 - Chart Add tab is slow

**Module:** EHR - Chart Add tab

**Problem:** When you go to the Expert tab to select diagnosis codes, axiUm is slow to load.
Solution: Fixed to improve speed.

125269 - Clicking on treatment record highlights the line above

Module: EHR - Tx History tab

Problem: If you delete a planned treatment record and then you immediately click on a different planned treatment record, axiUm sometimes fails to highlight the correct record in the list view.

Setup:

1. Open the EHR Options window.
   Go to EHR module - (Options/Settings).

2. Click the Tx History tab.

3. Go to the Sort Options section and select the Sort planned activity to the end of the list checkbox.

4. Click (close).
   axiUm closes the EHR Options window and returns to the EHR module.

Steps to replicate:

1. Go to the EHR module’s Tx History tab.
Make sure there are enough completed and planned treatments to display a vertical scroll bar.

2. Delete a planned treatment record.

3. Click on the first planned treatment record in the list view (this should be located immediately below the last completed treatment record). In our example, you would click on the treatment record for D4210.

axiUm highlights the line above the planned treatment record for D4210.

Solution: Fixed so that in the above scenario, clicking on the planned treatment record highlights that record.

---

**125452 - Field values are not saved**

**Module:** EHR ~ Edit Patient Medication window

**Problem:** When you create a record for an existing medication, axiUm clears some of the fields.

**Steps to replicate:**

1. Open the Patient Medication Entry window.
   
   Go to EHR - Medications - (Create a new Record) - Existing Medication option.
2. Enter the fields and options. For our example, we will enter the following:
   - Drug: Tylenol-3
   - Dosage: 30 mg
   - Total: 12
   - Refills: 1
   - Note: Do not refill until all pills are used.

![Patient Medication Entry](image)

3. Click the OK button.
   axiUm saves the entries, closes the Patient Medication Entry window, and returns to the EHR module.

4. From the list view, double-click on the medication record you created.
   axiUm displays the Edit Patient Medication window. The following fields are now blank:
   - Total
   - Refills
   - Note
Solution: Fixed so that in the above scenario, axiUm retains the values you entered in these fields.

125500 - Completing treatments cuts off associated notes

Module: EHR ~ General Note window

Problem: When you change a treatment record from status Planned to status Completed, axiUm cuts off the associated note after 4,000 characters.

Steps to replicate:
1. Enter a planned treatment (by going to EHR window - Chart Add tab).
2. From the Tx History tab, highlight the planned treatment record you created, and select the Add Tx Note right-click option. axiUm displays the Select Note Type window.
3. Select the General Note option.
4. Click the OK button to display the General Note window.
5. In the text box, enter text. Make sure it exceeds 4,000 characters.
6. Click the OK button to save the entries, close the General Note window, and return to the EHR window.
7. Change the planned treatment record to status Completed (by going to the Tx History tab and selecting the Complete Treatments right-click option to display the Complete Treatments window).
8. From the Tx History tab, go to the general note record and double-click on it to display the General Note window.

Part of the note is now missing.

Solution: Fixed so that in the above scenario, axiUm displays the full note.
125577 - Checkbox overlaps tab

**Module:** EHR - Attachments tab

**Problem:** The *Release of patient information consent on file* checkbox is too close to the tab, cutting off the tab border.

**Solution:** Fixed so that the checkbox no longer interferes with the tab borders.

---

125771 - Drop-down field is too short

**Module:** EHR ~ Re-activate Treatment window

**Problem:** In the Re-activate Treatment window (in EHR module - Tx History tab - Re-activate Treatment right-click option), the drop-down field displays both the code and its description. However, the description portion is too short to display long text.

**Solution:** Increased the description portion of the drop-down field to display longer text.

---

126245 - Controlled substances not filtered based on access

**Module:** EHR ~ Patient Prescription Entry window

**Problem:** If you have *no* access rights to controlled substances (in the Users window - Clinical tab - Can Prescribe section, the Controlled Substances to checkbox is deselected), axiUm still displays them in the Patient Prescription Entry window (in EHR module - Medications tab - (Create a new Record) - New Prescription option) when you click on the Drug drop-down field.

If you have *restricted* access rights to controlled substances (in the Users window - Clinical tab - Can Prescribe section, the Controlled Substances to checkbox is selected and the drop-down
field displays a restricted level) axiUm does not display the restricted substances in the Patient Prescription Entry window, and this is fine.

**Solution:** Fixed so that in the above scenario, axiUm hides the controlled substances in the Patient Prescription Entry window.

---

## 126271 - Approved By column is confusing

**Module:** EHR ~ Select Form History window

**Problem:** When you go to the EHR window’s Forms tab and view an EPR form, the Last Appr field displays the name of the user who approved this form, and this is fine.

However, in the Select Form History window (in the EHR module - Forms tab - Show History), the Approved By column is blank. If you created an EPR form and you do not require approval, this column displays nothing, and this can be confusing.

**Solution:** Fixed. Made the following changes to the Select Form History window:
• Show Approvals: Selecting this checkbox displays the Approved By column and displays any associated approval user.

• Created Date: This disabled field indicates the date the EPR form was created.

---

**126481 - The Reprint Prescription right-click option is enabled**

**Module:** EHR - Medications tab

**Problem:** When you highlight a void prescription record, the Reprint Prescription right-click option is enabled, and selecting this does nothing. Because you are disallowed from printing void prescription, this option should be disabled.

**Solution:** Fixed so that in the above scenario, the Reprint Prescription right-click option is disabled.
**126795 - Prescribing undefined drugs not creating medication records**

**Module:** EHR ~ Medications tab

**Problem:** When you create a prescription for an undefined drug, axiUm displays this record in the prescriptions list (in EHR window - Medication's tab - Prescriptions option), and this is fine.

```
Date   Drug      Dose    Total  Refills  Provider  Provider Name  Approved By
01/06/2009 Amoxicillin  125 mg/5ml 0     0        Admin. Arum
01/06/2009 Amoxicillin  125 mg/5ml 0     0        Admin. Arum
04/11/2011 Alkaline water (distilled) 1 tsp or 1/4 tbl-1 0
12/01/2011 Amoxicillin (powder) 200 mg/5ml 0 Admin. Arum
09/05/2012 Cetirizine  12 tablets 0 Admin. Arum
```

However, if you view the medications list (by selecting the Medications option), axiUm does not display the same record.

```
Date   Drug      Dose    Total  Refills  Start Date  End Date  Entry User
01/06/2009 Amoxicillin  125 mg/5ml 0 01/06/2009 01/06/2009 Admin. Arum
15/03/2012 Benadryl  250 mg 0 15/03/2012 15/04/2012 Admin. Arum
```

**Solution:** Fixed so that in the above scenario, axiUm displays a copy of the prescription record in the medications list.

---

**126872 - Template note answer changes**

**Module:** EHR ~ Template Note window

**Problem:** If you create a template note containing a list-type answer that includes both 1 and 10, and you select 1, re-opening this note later displays 10.

**Solution:** Fixed so that the template note displays the answer you selected.
127099 - Completed extractions cannot be modified

**Module:** EHR - Tx History tab

**Problem:** If you complete an extraction-type treatment (e.g. D7210), and later you edit this record (e.g. change the discipline), axiUm displays the error message, "Cannot apply this on tooth __. This requires the tooth to be present."

**Solution:** Fixed so that in the above scenario, you can save the changes.

---

127233 - Procedure code changes when adding condition/finding

**Module:** EHR - Chart Add tab

**Problem:** Sometimes, when you add a condition for which its condition code begins with the same character as a regular procedure code, axiUm switches the condition code to a similar procedure code.

**Solution:** Fixed.

---

**Evaluations**

123037 - Modified evaluations display incorrect user

**Module:** Evaluations

**Problem:** Modifying grades in existing evaluations indicates it was modified by the instructor, but saves under the entry user name.

**Solution:** Fixed. So that User column displays entry user not instructor.

---

125978 - Field labels are cut off

**Module:** Evaluations - Periodic Evals tab

**Problem:** In the Evaluations window’s Periodic Evals tab, the following fields are cut off:

- Approved: Depending on your workstation's resolution, this field label may be cut off.
- Contacts: Regardless of your workstation's resolution, this field label is always cut off.
Solution: Fixed so that the above field labels are fully displayed.

---

**General**

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**104238 - Display issue with the Printing window**

**Module:** Printing

**Problem:** When you are in an insurance claim window (e.g. ADA Insurance Claim window), and you print the claim to paper, axiUm briefly displays the Printing window. This window does not use standard axiUm display format.

**Solution:** Fixed so that the Printing window uses the standard axiUm display format.

---

**119013 - Unnecessary message**

**Module:** Start Check

**Problem:** When you start-check an appointment containing a treatment for which the provider requires no consent, axiUm still displays the consent warning, "The Patient has NOT consented to at least one of the scheduled treatments. Are you sure you want to continue?" This message is unnecessary.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this warning.

---

**123273 - Auto-update fails**

**Module:** Others

**Problem:** When a newer version of axiUm becomes available to you, and you try opening the application, axiUm asks, "You are running an older version of axiUm. Do you want to update now?" If you click the Yes button, the update fails.

**Solution:** Fixed so that in the above scenario, axiUm runs the auto-update.

---

**125008 - Start Check refresh problem**

**Module:** Start Check

**Problem:** If you have a start check waiting for approval, and you log onto axiUm, the start check indicator on the status bar takes two minutes to turn from gray to red. During this time, you may not realize that you have a pending start check.

**Solution:** Fixed so that in the above scenario, the start check indicator displays red immediately after logging onto axiUm.
125255 - axiUm loads old Crystal drivers

**Module**: Crystal Reports

**Problem**: If your workstation is set up to use .NET Crystal engine (in Maintenance module - System tab - Station Options icon - Station Options window - General section - Report Section - Engine item - Default field = 2), axiUm still loads the old Crystal drivers.

**Solution**: Fixed so that in the above scenario, axiUm loads the new Crystal drivers.

---

127269 - Report heading overlaps title

**Module**: Survey report

**Problem**: When you print a survey, if the practice information displayed in the report heading is too long, it overlaps the report title.

**Solution**: Fixed.

---

**Info Manager**

122911 - Daily Activity Report omitting insurance adjustments

**Module**: Info Manager ~ Daily Activity report

**Problem**: In the Daily Activity Report (in Info Manager module - Practice tab - Daily Activity Report category), axiUm no longer displays insurance adjustments that are disassociated with the patient.

**Solution**: Fixed.

---

124653 - eRx Log report uses incorrect date criteria

**Module**: Info Manager ~ eRx Log report

**Problem**: When you run the eRx Log report (in Info Manager module - Clinical tab - eRx category), and you add a column condition for the Date column, axiUm displays no results even if there are records for that date.

**Solution**: Fixed so that axiUm displays records that exist for the selected date.

---

124657 - Loading incorrect exanmail.dot & exanmail.dotm files

**Module**: Info Manager ~ Select Letter Template window

**Problem**: Sometimes, when you run a mail merge (in Info Manager module - Letters button - Select Letter Template window), using a workstation configured for a Citrix environment, axiUm displays the error message, “Run-time error ’76’ : Path not found”. This occurs when the Temp folder contains older versions of exanmail.dot or exanmail.dotm.
Solution: Fixed so that in the above scenario, axiUm ensures that the correct versions of these files are used (from the axiUm install directory).

---

**126120 - Customized field labels display generic labels**

**Module:** Info Manager ~ Report Definition window

**Problem:** The Patient Office Charges report displays the generic label instead of the customized text you defined.

Setup:

1. Open the Custom Fields window.
   - Go to Maintenance module - Basic tab - Custom Fields icon.

   ![Custom Fields Window](image)

2. From the Field drop-down field, select the Treatment/Note 1 option.

3. In the Description field, enter a custom text. For our example, we will enter Location.

4. Click ![Add a new Record](image).
   - axiUm adds the new record to the list view.
5. From the Field drop-down field, select the Treatment/Note 2 option.

6. In the Description field, enter a custom text. For our example, we will enter Prognosis.

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

8. Click (close).
   axiUm closes the Custom Fields window and returns to the Maintenance module.
Steps to replicate:

1. From the Info Manager window, click the Billing tab.

2. Right-click to display a list of options and select the Edit Report option. axiUm displays the Report Definition window.

3. From the Files list box select the Patient Office Chg. option.

In the Fields list box, axiUm displays the generic labels **Chg. Custom 1** and **Chg. Custom 2**, not the customized labels we defined.

**Solution:** Fixed so that in the above scenario, these custom fields display their customized text.
126142 - Report titles use inconsistent font style

Module: Info Manager

Problem: Some reports (e.g. Aged Balances report) display the report title using regular font style, while other reports (e.g. Daily Activity Report) display the report title using bold font.

Solution: Fixed so that all report titles use Microsoft Sans Serif 13 font, bold.

126289 - Unable to export notes longer than 1,024 characters

Module: Info Manager ~ Clinical Notes report

Problem: In the Clinical Notes report, when you export a record, the Note Comment field displays only the first 1,023 characters of a SOAP note. Need an indication that the note is longer.

Solution: Fixed so that if the string is longer than 1,024 characters, axiUm displays (ellipsis) at the end of the string.

127082 - Guarantor Statements report not printing

Module: Info Manager ~ Guarantor Statements report

Problem: The Guarantor Statements report (in the Info Manager module - Billing tab - Guarantor Statements category) fails to display the patient ID. This prevents you from correctly printing the guarantor statement.

Solution: Fixed so that in the above scenario, axiUm prints the guarantor statement correctly.

127524 - Strange behaviors with Column Conditions window

Module: Info Manager ~ Column Conditions window
**Problem:** There are two behavior issues with the Column Conditions window (accessed by going to the Info Manager module and clicking on a column heading):

Problem 1: When you open the Column Conditions window, clicking on any field the first time does nothing (e.g. clicking on the Value 1 field does not show the cursor). The second time works fine.

Problem 2: When you open the Column Conditions window, it loses focus, meaning the window is inactive. You can still access the Info Manager window behind it and click on additional column headings to display more Column Conditions windows.

**Solution:** Fixed both problems.

Solution 1: When you initially open the Column Conditions window, clicking a field the first time selects it.

Solution 2: You cannot click on additional column headings in the Info Manager window to display more Column Conditions windows. Only the currently displayed Column Conditions window remains displayed.

---

**127525 - Time fields are rounded**

**Module:** Info Manager

**Problem:** When axiUm extracts time fields from the Oracle DateTime field, the time is rounded off.

**Solution:** Fixed.

---

**Inventory**
125251 - Special Characters throwing off default Inventory Location

**Module**: Inventory ~ Inventory Setup window

**Problem**: If an inventory location code contains an underscore ( _ ) or a hyphen ( - ), and you select this as your workstations’ default location code, axiUm selects a different location code (the closet match but without special character).

**Solution**: Fixed so that in the above scenario, axiUm uses the default location code you selected.

---

125593 - Button is cut off

**Module**: Inventory ~ Inventory Order window

**Problem**: In the Inventory Order window (in Inventory window - Pending Orders tab - run a search - highlight item in the list view - Order button), the Ordering Info button is cut off

**Solution**: Fixed to display the entire button.

---

Lab Tracking

125794 - Empty columns display comma ( , )

**Module**: Lab Tracking ~ Lab Order Details window

**Problem**: In the Lab Order Details window (in Lab Tracking module - Order Requests tab - double-click item from list view), if the Appr. User column is blank (i.e. it has not yet been approved), a comma is displayed in the blank column.

**Solution**: Fixed so that in the above scenario, axiUm excludes the comma ( , ) in blank columns.

---

Maintenance

81202 - Button displays only after modifying record

**Module**: Maintenance ~ Appointment Code Access window

**Problem**: In the Appointment Code Access window, if you change a code to limited access, you must modify this change first before having the ability to define the limited access.
Steps to replicate:

1. Open the Appointment Code Access window. 

2. Select a record where the Access drop-down list displays either Yes or No option. For our example we will select A - Dental Assistant.

3. From the Access drop-down field, select the Limited option. axiUm should display the Providers button so you can limit this access code based on select providers.

4. Click (Modify Record). Now axiUm displays the Provider button.
Now you can now click the Providers button and select providers to give access to this appointment code. However, after doing this you must click (Modify Record) again to save the changes.

Clicking (Modify Record) is similar to clicking a Save button; you select it after you have made all the changes. axiUm should not give you additional options afterwards.

**Solution:** Fixed. Now axiUm always displays the Providers button (in disabled mode). Only when you go to the Access drop-down field and select the Limited option does axiUm enable this button.

---

### 100536 - EDI Code field missing in Dutch version

**Module:** Maintenance ~ Insurance Company window

**Problem:** This affects Dutch version only. In the Insurance Company window (in Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window (Create a new Record)), axiUm displays the EDI Code field. This field is missing in the Dutch version.

**Solution:** Fixed so that the Dutch version displays the EDI Code field.

---

### 118197 - Objects can be defined with no color

**Module:** Maintenance ~ Procedure Code window.

**Problem:** In the Procedure Code window’s Graphic Detail section, if the Type drop-down field displays the Object option, you can leave the Color drop-down field blank.
Solution: Fixed so that when you create a procedure code for an object, axiUm forces you to select a color before saving this record.

123092 - Using the Tab key navigates out of sequence
Module: Maintenance ~ Users window
Problem: If you go to the Users window (in Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record)), and in the Clinical tab or the Provider tab you use the Tab key to navigate, axiUm navigates out of sequence. In other words, axiUm does not select the next field you would typically look.

For example, in the Clinical tab, if you tab to the Require Approval section’s Lab Order (Add/Redo/Remake) checkbox, pressing the Tab key skips the Entries on behalf of another provider drop-down field, and jumps to the Can Approve section’s Planned Tx checkbox.

Solution: Fixed so that in the above scenario, axiUm navigates in logical sequence.

124844 - Appointment Expert window causes display problems
Module: Scheduler ~ Appointment Expert window
Problem: If you are using Windows 7, and you try opening the Appointment Expert window, axiUm briefly displays the preview window before displaying the Appointment Expert window.

Solution: Fixed so that in the above scenario, axiUm does not display the preview window.

124934 - Tab order out of sequence
Module: Maintenance ~ Practice Options window
Problem: In the Practice Options window (in Maintenance module - Office tab - Practices icon - Practices window - (Practice Options)), pressing the Tab key navigates out of sequence.

Solution: Fixed so that axiUm navigates in sequence.

125075 - axiUm fails to verify duplicate chair import code
Module: Maintenance ~ Chairs window
Problem: When you enter an import code (in Maintenance module - Scheduler tab - Chairs icon - Chairs window - Import Code field), axiUm fails to verify the uniqueness of the import code. This causes Import Schedules (Clinic Times) to use the incorrect chair.

Solution: Fixed. Now when axiUm detects duplicate import codes, it displays a warning.
125382 - Cannot clear Birth field

**Module:** Maintenance ~ Users window

**Problem:** When you clear the birth date in a user’s record, axiUm retains the previous entry.

Steps to replicate:

1. Open the Users window.
   
   Go to Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record).

2. Click the Personal tab.

3. Go to the Personal section.

4. Go to the Birth field and clear the entry.

5. Click the Save button to save the changes,

6. Click the Close button to close the Users window and return to the Users List window.

7. Re-open the same record.
   
   The value in the Birth field is still displayed.
**Solution:** Fixed so that in the above scenario, axiUm saves the cleared value.

---

### 125497 - Existing records are not displaying

**Module:** Maintenance ~ Select Level/User window  

**Problem:** When copying color definitions from a user or user level, axiUm displays no options to copy from.

**Steps to replicate:**

1. Open the Copy Tx History Color Definitions window.
   - Go to Maintenance module - EHR tab - EHR Display Options icon - EHR Display Options window - (Tx History Color Definitions) - Tx History Color Definitions window - (Copy Tx History Color Definitions).

2. Click the Level/User Copy From (ellipsis).
   - axiUm displays the Select Level/User window. This window is blank, and you cannot copy the selected color definition from other users or user levels.

**Solution:** Fixed so that in the above scenario, axiUm displays all existing user levels.

---

### 125700 - Fields are too short

**Module:** Maintenance ~ Edit Coverage Template window, Benefit Plan Coverage window
**Problem:** The fields in the following windows are too short. Depending on the field, you are limited to three or four uppercase letters (e.g. Ws).

- Edit Coverage Template window (in Maintenance module - Insurance tab - Coverage Template icon - Coverage Template List window - ![Coverage Items]) :
  - Category field: Limited to three uppercase letters.

  - Category field: Limited to four uppercase letters.  
  - From field: Limited to four uppercase letters.  
  - To field: Limited to four uppercase letters.

**Solution:** Fixed so that the fields in the following windows are longer:

- Edit Coverage Template window:
  - Category field: Now allows six characters.

- Benefit Plan Coverage window:
  - Category field: Now allows six characters.  
  - From field: Now allows seven characters.  
  - To field: Now allows seven characters.

You can also horizontally scroll between characters in these fields.

**125706 - Fields are enabled in history window**

**Module:** Maintenance ~ Provider Non-Clinic Times History window  
**Problem:** In the Provider Non-Clinic Times History window (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - ![Non-Clinic Times]), the following fields are enabled:

- Date
- Starting on
- Ending on

Because this window displays historic records, all fields should be disabled.

**Solution:** Fixed so that the above fields are disabled.
125905 - Closing window causes crash

Module: Maintenance ~ Provider Non-Clinic Times History window

Problem: In some cases, when you close the Provider Non-Clinic Times History window (in Maintenance module - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - (Non-Clinic Times) - Provider Non-Clinic Times window - (Show History)), axiUm crashes.

Solution: Fixed so that in the above scenario, axiUm no longer crashes.

125967 - Clearing Checkbox does not save if custom warning is set

Module: Maintenance ~ Insurance Company Advanced Options window

Problem: In the Insurance Company Advanced Options window, if you deselect the Custom warning checkbox, axiUm does not clear the custom warning. This causes axiUm to select the checkbox when you re-open the Advanced window.

Steps to replicate:

1. Open the Insurance Company Advanced Options window.
   Go to Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window - (Edit Record) - Advanced button.

2. Select the following fields and options:
   - Warn if Services are not covered: From this drop-down field, select one of the following options:
     - On add
     - On approval
     - Both
   - Custom warning: Select this checkbox.
3. Click on the Warning button.

axiUm displays the Services Not Covered Text window.

4. In the text box, enter a custom text message. For our example, we will enter **This procedure is not covered by the patient’s primary insurance company. Do you want to continue?**

5. Click the OK button.

axiUm saves the entries, closes the Services Not Covered Text window, and returns to the Insurance Company Advanced Options window.

6. Click the OK button.

axiUm saves the changes, closes the Insurance Company Advanced Options window, and returns to the Insurance Company window.
7. Return to the Insurance Company Advanced Options window. The Custom warning checkbox is selected, and this is fine.

8. Deselect the Custom Warning checkbox.

9. Click the OK button.

   axiUm closes the Insurance Company Advanced Options window and returns to the Insurance Company window.

10. Return to the Insurance Company Advanced Options window.

    The Custom warning checkbox is still selected.
Workaround: Clear the text in the Services Not Covered Texted window first, and then deselect the Custom Warning checkbox.

Solution: Fixed so that in the above scenario, axiUm saves the checkbox and clears the custom warning.

126031 - Moving records in list view causes display issue

Module: Maintenance ~ Periodontal Display Conditions

Problem: In the Periodontal Display Conditions window (in Maintenance module - Perio tab - Perio Displays icon - Periodontal Display Options window - (Perio Display Conditions)), if you go to either the upper or bottom list view, highlight an item, and click the Up button or the Down button, axiUm moves the record up or down the list view. However the valued displayed in the first column remains in its original position.

Steps to replicate:

1. Go to the Lingual Conditions to Chart list view (bottom list view).

2. Highlight the record Gingival Margin.

3. Click the Up button.
axiUm moves the record up one level. However, the value in the first column (i.e. Gingival Margin) remains in the original row.

<table>
<thead>
<tr>
<th>Lingual Conditions to Chart</th>
<th>Display Type</th>
<th>Chart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plaque</td>
<td>Dots</td>
<td>Yes with auto-advance</td>
</tr>
<tr>
<td>Pocket Depth</td>
<td>Bars</td>
<td>Yes with auto-advance</td>
</tr>
<tr>
<td>Bleeding</td>
<td>Line</td>
<td>Yes with auto-advance</td>
</tr>
<tr>
<td>Gingival Margin</td>
<td>Dots</td>
<td>Yes</td>
</tr>
<tr>
<td>Attachments</td>
<td>Line</td>
<td>No</td>
</tr>
<tr>
<td>Calculus</td>
<td>Line</td>
<td>Yes with auto-advance</td>
</tr>
<tr>
<td>Furcation</td>
<td>Line</td>
<td>Yes</td>
</tr>
<tr>
<td>Tooth Mobility</td>
<td>Bars</td>
<td>Yes with auto-advance</td>
</tr>
</tbody>
</table>

**Solution:** Fixed so that in the above scenario, axiUm moves the entire row.

---

**126919 - Sub-questions not inheriting parent question setup**

**Module:** Maintenance ~ Form Item - Checklist Item window, Form Item - Additional Info window

**Problem:** In the Form Item - Checklist Item window or the Form Item - Additional Info window, the Available in iForms checkbox is enabled even if the parent question has this checkbox disabled.

**Solution:** Now in the above scenario, axiUm enables this checkbox for child questions only if the parent question has this checkbox selected.

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**127140 - Services Not Covered Text window is missing scroll bar**

**Module:** Maintenance ~ Services Not Covered Text window

**Problem:** In the Services Not Covered Text window (in the Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window - (Edit Record) - Insurance Company window - Advanced button - Insurance Company Advanced Options window - Warning button), axiUm displays no scroll bar. This prevents you from viewing long text.

**Solution:** Fixed so that this window displays a scroll bar.

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**127292 - Citrix/RDP problem**

**Module:** Maintenance ~ System Options window

**Problem:** If you log on from Citrix/RDP (remote desktop protocol), axiUm incorrectly passes the server name instead of the client name.

**Solution:** Fixed so that in the above scenario, axiUm pass the name of the client.

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**127576 - Unnecessary database records**

**Module:** Maintenance ~ Quick List Categories window

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Problem: If you go to the Quick List Categories window (in Maintenance module - EHR tab - EHR Display Options icon - EHR Display Options window - (Quick Lists)), and delete a record containing items, axiUm to retains this association in the database, creating extraneous database records. Note that this is not visible to the user.

Solution: Fixed so that in the above scenario, axiUm deletes these extraneous records.

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**Messenger**

### 125642 - Message printout exclude CC recipients

**Module:** Messenger

**Problem:** When you print a received message, axiUm omits the CC recipients from the printout.

Steps to replicate:

1. Open the Messenger module and create a new message for a recipient. Make sure that you also select a recipient in the CC field.

2. Click the Send button to send the message.

3. Log onto axiUm as the recipient of this message and open the Messenger module.
4. From the Inbox list view, double-click on the message. axiUm displays the View 'Received' Message window.

5. Click on the Print button.

axiUm prints the message to the default printer.

Solution: Fixed so the message printout includes the following fields:

- **To:** This displays recipients added to the To field.
- **CC:** This displays recipients added to the CC field.
- **BCC:** If you (the sender) print a sent message, this field displays recipients you added to the BCC field. If you are a CC recipient or a BCC recipient, this is always blank to retain anonymity.
126880 - axiUm requires entry of disabled field

Module: Ortho Manager

Problem: When you edit an ortho visit note, you are asked to enter a required field, even though this is unnecessary for ortho visits (and therefore the field is disabled).

Setup:

1. Create a custom field for field type Treatment (Clinical). For our example, we will create one called Prognosis,
2. Select the Entry is required checkbox.
3. Click (Add a new Record) to save the entry and display the record in the list view.
4. Click (close) to close the Custom Fields window and return to the Maintenance module.

Steps to replicate:

1. Open the Add Ortho Visit/Ortho Treatment window.
   
   Go to Ortho Manager module - (Ortho Treatment History) - Ortho Tx History window - (Create a new Record).
2. Enter the fields and option. For our example, we will enter the following:

- Provider: D1234, David Caan
- Is an ortho visit: Select this checkbox. Selecting this checkbox disables the custom field (i.e. Prognosis) we defined in the setup, and this is fine.
- Ortho Notes text box: enter any text (e.g. Patient’s first ortho visit.)

3. Click the OK button to save the entries, close the Add Ortho Visit/Ortho Treatment window, and return to the Ortho Tx History window. The new record is displayed in the list view.
4. From the list view, double-click on the record you just created to display the Edit Completed Ortho Treatment / Ortho Visit window.

5. In the Ortho Notes text box, make changes to the original text. For our example, we will change this text to “Patient's second ortho visit.”

6. Click the OK button.

axiUm displays a message indicating that you must enter the required field (i.e. Prognosis field). However, this field is unnecessary for ortho visit records and therefore disabled.

Solution: Fixed so that in the above scenario, axiUm no longer displays the message.
Patient Attachments

125359 - Selecting multiple parameters causes consent form to fail

Module: Patient Attachments - Consents

Problem: This problem occurs if your workstation is running on .NET engine. Sometimes, when you add a consent form and defined multiple parameters for it, axiUm displays only the first parameter in the report.

Solution: Fixed so that in the above scenario, axiUm displays all parameters you defined.

Patient Care

125024 - Old engine causes consents to hang

Module: Patient Care

Problem: If your workstation is set up to use CRPE Crystal engine (in Maintenance module - System tab - Station Options icon - Station Options window - General section - Report Section - Engine item - Default field = 1) and you try adding a patient consent, axiUm hangs.

Solution: Fixed so that in the above scenario, axiUm no longer hangs.

Patient Card

125384 - No validation on patient contact note codes

Module: Patient Card ~ Patient Contact Notes window

Problem: In the Patient Contact Notes window (in Patient Card window - (Contact Notes)), if you go to the Code field, enter a new value (one that does not exist in axiUm), and click (Add a new Record), axiUm saves this new code to the record you added. This should be disallowed.

Note: The changes you made to the patient contact note code applies only to the record you just added. The original code is retained in the Contact Note Codes window.

Solution: Fixed so that in the above scenario, axiUm displays a message indicating that the code is invalid.
125611 - Random insurance billing order

Module: Patient Card ~ Patient Info window

Problem: If you enter multiple insurance policies of equal policies, axiUm has no “tie breaker” criteria to determine their billing order. This results in a billing order that is inconsistent from one time to another. Need sorting criteria for axiUm to follow.

Solution: Now axiUm uses the following sequence of criteria to determine billing order: Insurance Company, Group#, Division#, Subscriber ID, and Policy ID.

126588 - PatHis.rpt Requires Deprecated PATEVENT Table

Module: Patient Card ~ Patient History report

Problem: When you go to the Patient History window and click the Preview Report button to display the Patient History report, axiUm displays the error message, “Error in File C:\Axium5.00.07\SREPORTS\PATHIS.RPT: The table could not be found.”

Solution: Fixed so that in the above scenario, axiUm no longer displays the error message.

126816 - Regenerating PatientAccess password not working

Module: Patient Card ~ Internet Access window
Problem: In some cases, if you go to the Internet Access window (Patient Info window - Personal tab - Status section - Internet Access button) and click the Regenerate button, the patient is unable to log on to the PatientAccess module using the regenerated password.

Solution: Fixed so that in the above scenario, the patient can log on using the regenerated password.

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### Personal Planner

121273 - Inconsistent terminology

**Module:** Personal Planner - Lists tab

**Problem:** In the Scheduler window - Availability tab - History tab, rescheduled appointment records have the Type column displaying Reschedule (present tense).

![Scheduler History Table](image)

However, in the Personal Planner window - Lists tab - Appointments tab, the same appointment record has the Type column displaying Rescheduled (past tense).

![Personal Planner Appointments Table](image)

**Solution:** Now in the above scenario, axiUm displays these as Reschedule.

---

### Power Admin

125645 - Roles overriding default rights not working

**Module:** Power Admin

**Problem:** If you go to the Power Admin module and create a level containing multiple roles, with all roles set to no access (red) by default, and then you grant access (green) to one item for one of these roles, axiUm grants no access to that item for this entire level.

**Solution:** Fixed so that if one role has access (green) to an item, the entire level has access to that item, even if all other roles within that level is set to no access (red) by default.
125671 - Missing control

**Module:** Power Admin ~ Oral Cavity Selection Warning window

**Problem:** In the Oral Cavity Selection warning window (in Dialogs - ELECTRONIC HEALTH RECORD (EHR) - Chart - Chart Warnings - Oral Cavity Selection Warning), the ✕ (close) is missing, preventing you from closing this window. The workaround is to press ESC.

![Oral Cavity Selection Warning Window](image)

**Solution:** Fixed so that this window displays the ✕ (close) icon.

125990 - Misplaced warning windows

**Module:** Power Admin

**Problem:** Some warning windows are located under the incorrect module. If you give a user level access to one module, they will have no access to those warning windows located under a different module to which they have no access.

For example, the Copy Patient Question window is located in Dialogs - PATEINT AREA - Patient Area Warnings. It should be located in Dialogs - ROLODEX - Rolodex Warnings.

**Solution:** Fixed so that warning windows are under the correction module.

126420 - Incorrect settings displayed for red & green based roles

**Module:** Power Admin ~ Control Settings For All Roles window

**Problem:** When you create multiple roles, and apply the same default rights to them, these color settings display incorrectly in the Control Settings For All Roles window.

**Setup:**

1. Open the Roles window.
   Go to Power Admin module - File menu - Roles option.

2. Click the New button.
   axiUm clear the fields.
3. Enter the fields and options. For our example, we will enter the following:
   - Description: Role1
   - Default Rights: No Access (all red)

4. Click the Add button.
   axiUm saves the entries and displays the new record in the list view.

5. Repeat steps 2 - 4 to create another record called Role2.

You now have two red-based roles, Role1 and Role2.
6. Click (close).

axiUm closes the Roles window and returns to the Power Admin window.

Steps to replicate:

1. From the main Power Admin window, go to the second drop-down field and select the Role1 option.

![Power Admin - doc51](image)

Steps to replicate:

2. Open a window. For our example, we will go to Dialogs - CHART TRACKING - Chart In - Chart In window.

All the fields are red. This is fine.

![Chart In](image)

3. Right-click on the displayed window and select the Show Control Settings right-click option.

axiUm displays the Control Settings For All Roles window.

The Access column for the currently selected red-based role (i.e. Role1) displays No - Red. This is fine.
However, the Access column for the other red-based role (i.e. Role2) displays Full Access - Green. Remember this.

4. Return to the main Power Admin window, go to the second drop-down field, and select the Role2 option.

5. Open the same window (i.e. the Chart In window).
   The setting for Role2 is now all-red (even though step 3 indicated green). This is now fine.
6. Open the Control Settings For All Roles window again.

The Access column for the *currently selected* red-based role (i.e. Role2) displays No - Red. This is also now fine.

However, the Access column for the *other* red-based role (i.e. Role1) now displays Full Access - Green (even though step 3 indicated all-red).

The problem is that the Control Settings For All Roles window displays the correct setting only for the role displayed in the main Power Admin window's second drop-down field. axiUm displays the *opposite* setting for other roles you created. For example, if you created five red-based roles, the one currently displayed in the Power Admin window's second drop-down
field show the correct setting while the records for the other four roles display the opposite settings.

This problem also occurs if you follow the above setup steps using Full Access (all green) option; then the current role shows green and other roles show red.

Note: This is a display issue only. The settings do work as defined.

**Solution:** Fixed so that in the above scenario, the Control Settings For All Roles window displays the settings defined in the Roles window.

---

### 126625 - Inconsistent terminology

**Module:** Power Admin ~ Estimate window  
**Problem:** When you go to axiUm and open the Estimate window (in EHR module - Tx History tab - ![Estimate](image) - Select Planned Treatments window - OK button), there is a section called Estimated Values and it displays the option called Stored Values.

However, in the Power Admin module, the same section is called Estimated Amounts and the option is called Planned Tx Date.
Solution: Fixed so that the section displays the title Estimated Values and the option is titled Stored Values
127239 - Find Menu Item window shows incorrect module

**Module:** Power Admin

**Problem:** When you search for a menu item, the search results display incorrect menu and module.

Steps to replicate:

1. Open the Find Menu Item window.
   Go to a branch - Find Menu Item right-click option.

   ![Find Menu Item window](image)

2. In the Criteria field, enter a menu name. For our example, we will enter **Patient Appointments**.

3. Click the Search button to run the search.

   ![Find Menu Item search results](image)

   Note that the Patient Appointments menu indicates it belongs to:

   - **Menu:** Chart - Preventive Care
     This is correct

   - **Module:** EDI Claims
     This is incorrect. It should be EHR (Note that this is only a display issue).
4. Click the Go To button to go to this menu in Power Admin. axiUm takes you to the EHR section’s Chart - Preventive Care menu, and this is fine.

![Power Admin - ax51](image)

This problem occurs when you search for any menu item.

**Solution:** Fixed so that in the above scenario, axiUm displays the correct module name in the Find Menu Item window’s Module column.

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**127240 - Menu item is missing**

**Module:** Power Admin

**Problem:** In Menus branch - Shared section - Tx History - Treatments section, the Patient Appointments menu item and the Family Appointments menu item is missing. Running a search for these menu items displays no results.

**Solution:** Fixed so that axiUm now displays the Patient/Family Appointments menu item.

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**Rolodex**

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**120987 - Evaluation form not auto-displaying**

**Module:** Rolodex ~ Patient Approvals window

**Problem:** If a provider requires approval for both a note and a treatment (that needs grading), and you cancel the approval process for the note only, approving the treatment does not automatically display the associated evaluation form.

**Solution:** Now in the above scenario, axiUm displays the message, "The approval process has been cancelled but some approved treatments may require grading. Please check the Unevaluated Tx tab in Evaluations Manager." You can then go to the Evaluations module and search for the associated evaluation form.
125207 - NY Medicaid not appending ancillary claim to today’s claim

**Module:** Rolodex ~ Patient Approvals window

**Problem:** This problem occurs if the Practice Options window (in Maintenance module - Office tab - Practices icon - Practices window - (Practice Options)) has the **Auto batch claim upon Patient Approvals** checkbox deselected. Then when you add a treatment for a NY Medicaid claim today, and then later you add an ancillary treatment, axiUm adds the new treatment as an independent claim without a rate code.

**Solution:** Fixed so that in the above scenario, axiUm appends the claim to today’s existing NY Medicaid claim.

125490 - axiUm default logo not displaying

**Module:** Rolodex

**Problem:** When you open the Rolodex module with no patient selected, the patient picture area displays a black box instead of the default axiUm logo image.

The same problem also exists in the Scheduler window.

**Solution:** Fixed so that in the above scenario the default axiUm logo is displayed.
Also fixed the same problem in the Scheduler module.

126370 - Requested date changes

**Module**: Rolodex ~ Appointment Request window

**Problem**: When you create a new appointment request, axiUm changes the value in the Date field to the one indicated in the Not Before field.

**Steps to replicate:**

1. Open the New Appointment Request window.
   
   Go to Rolodex module - patient selection list - Appt Request right-click option.

2. Enter the fields and options:
   
   - Date: Oct. 31, 2012
   - Not Before: July 31, 2012
3. Click the Accept button.
axiUm closes the New Appointment Request window and returns to the Rolodex window.

4. Open the Appointment Request window
Go to Scheduler module - (Rolodex) - Rolodex (Select Patient) window - select patient - Patient Appointments window / Family Appointments window - double-click on appointment request record.

The Date field displays the date displayed in the Not Before field.

**Solution:** Fixed so that in the above scenario, axiUm retains the value you entered in the Date field.

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**Scheduler**

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**87291 - Misleading group box title**

**Module:** Scheduler - Availability tab

**Problem:** The group box called Dep't Criteria indicates that the list view contains information from the Departments window (in Maintenance module - Office tab - Departments icon). However, they are from the Clinic Procedure Limits window (in Maintenance module - Scheduler tab - Clinic Procedure Limits icon). Need to change the name of this group box.
Solution: Changed the name of the group box from Dep’t Criteria to Clinical Procedure Limits.

101487 - Appointment Expert window loses focus
Module: Scheduler ~ Appointment Expert window
Problem: When you access the Appointment Expert window through the Patient Appointments window or the Family Appointments window, the Appointment Expert window loses focus (meaning it is no longer the active window).
Solution: Fixed so that in the above scenario, the Appointment Expert window remains active.

116575 - Clinic holiday description not displaying
Module: Scheduler - Active tab
Problem: When you view a book that uses book-by-provider method, axiUm does not display the clinic holiday description.
Solution: Fixed so that in the above scenario, axiUm displays the clinic holiday description. Also fixed in the Weekly tab where axiUm previously displayed no holiday information.
124560 - Problems displaying tooltip information

**Module**: Scheduler - Weekly tab

**Problem**: If a provider with a multi-chair day has a hold time in one chair, going to the Weekly tab and moving the cursor over that time shows only the hold time information.

**Solution**: Fixed so that if a provider has a multi-chair day and:
- Has a hold time, the hold time information displays in the tooltip.
- Has no hold time, the chair and clinic information displays in tooltip.

124649 - Modify icon is disabled

**Module**: Scheduler ~ Session Layout window

**Problem**: When you go to the Session Layout window (in Scheduler module - Chair tab - Session Layout right-click option - Discipline/Group Layout window - ![Session Layout]), and you right-click on a chair to remove an existing discipline stamp, axiUm disables ![Modify Record] and you cannot save your changes.

**Solution**: Fixed so that in the above scenario, ![Modify Record] is enabled.

124662 - Monthly tab display issues

**Module**: Scheduler - Monthly tab

**Problem**: When you hover over a provider time, axiUm displays the chair reservation multiple times.

**Solution**: Fixed so that axiUm displays the chair reservation only once.

124848 - Right-click options not following Power Admin settings

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

**Problem**: In the Patient Appointments window and the Family Appointments window, some of the right-click options do not follow the Power Admin settings.

**Solution**: Fixed so that in the above scenario, the right-click options reflect the Power Admin settings.

125308 - Searching for hygiene recall causes SQL error

**Module**: Scheduler ~ Appointment Expert window

**Problem**: In the Appointment Expert window, run a search using the following criteria:
- Search on Reserved Chairs: This option is selected.
• More Appts: Click this button to display the Additional Appointment Info window and enter additional search criteria (either a hygiene recall or a new patient exam).

Then when you click the Search button, axiUm displays an SQL error.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the SQL error.

---

**125578 - Wait List does not obey patient availabilities**

**Module:** Scheduler ~ Appointment Lists window

**Problem:** If you book an appointment from the Appointment Lists window’s Wait List tab, axiUm does not comply with the patient availability as defined in the Patient Availability window.

**Setup:**

1. Open the Appointment Lists window.

   Go to Scheduler module - \(\text{Lists}\).  

2. Click the Wait List tab.

3. Run a search.
4. From the list view, double-click on an appointment record. For our example, we will select Jane Doe’s active appointment. axiUm displays the Edit Wait List Detail window.

5. Click the Availability button. axiUm displays the Patient Availability window.

6. Select the fields and options. For our example, we will select the following:
   - availability time grid: Monday - Friday, 1pm - 5pm
   - Patient requires _ Days notice for scheduling appointments: 5
7. Click the OK button.
   axiUm saves the changes, closes the Patient Availability window, and returns to the Edit Wait List Detail window.

8. Click the OK button.
   axiUm closes the Edit Wait List Details window and returns to the Appointment Lists window.

9. Click (close).
   axiUm closes the Appointment Lists window and returns to the Scheduler module.

Steps to replicate:

1. Go to the Scheduler window's Active tab.

2. Find an available appointment block.
   Make sure you find one within 5 days from today, and during a time the patient is unavailable. For our example, we will select a morning time for the current date.

3. Right-click and drag to fill an appointment block.

4. Let go of the mouse to display a list of options.
5. Select the Fill from Wait List option.

axiUm displays the Appointment Lists window’s Wait List tab.

6. Highlight the appointment record from the setup.

7. Click the Schedule button.

axiUm books the appointment for today’s morning although the patient requires five days notice and available on afternoons only.
**Solution:** Fixed so that in the above scenario, axiUm disallows you from booking this appointment.

**125600 - Refresh issue with tooltip**

**Module:** Scheduler - Active tab

**Problem:** When you hover over an appointment block, axiUm displays a tool tip. The information displayed in this tooltip is based on the setup in the Appointment Display Options window. If the setup includes the Appt Procedures option, the tooltip displays the procedure codes associated to the selected appointment block. However, if you move treatment records within the appointment block (e.g. clear the current procedure and add a different one), the tooltip still shows the original treatment record. This is a refresh issue.

**Solution:** Fixed refresh issue. Now the tooltip displays the procedure codes that are currently associated to the selected appointment block.

**125716 - Problem reserving chair for provider with non-clinic time**

**Module:** Scheduler - Chair tab

**Problem:** If you try reserving a chair for a provider whose work schedule contains a non-clinic time, axiUm displays the Non-Clinic Time Warning window. For example, if provider1 works 9am - 5pm (with a 12pm - 1pm non-clinic time), and you try reserving chair1, axiUm tries to reserve the chair for the entire work schedule (i.e. 9pm - 5pm). axiUm should reserve around the non-clinic time by reserving 9am - 12pm and 1pm - 5pm separately, and skipping 12pm - 1pm.

**Solution:** Fixed so that axiUm creates the reserves around the non-clinic time.

**125858 - Appointment Expert window displays incorrect results (1)**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you run a search for available chairs for an instructor, the search results include the instructor's non-clinic time.

**Solution:** Fixed so that in the above scenario, axiUm excludes the instructor's non-clinic time in the search results.

**125859 - Appointment Expert window displays incorrect results (2)**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When you run a search for available chairs for a provider and for instructorA, the search results include time blocks for chairs taken by instructorB.

**Solution:** Fixed so that in the above scenario, axiUm excludes time blocks taken by instructorB in the search results.
125922 - Chart locks not working

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

**Problem**: Selecting a patient record containing a chart lock still lets you book planned appointments, book appointments through the Appointment Expert window, and reschedule appointments.

Setup:

1. Open the Chart Tracking Locks window.
   Go to Maintenance module - Office tab - Chart Tracking Locks icon.

2. Select a chart lock. For our example, we will select Electronic Chart Locks.

3. Click (Chart Tracking Lock Definitions).
   axiUm displays the Chart Tracking Lock Definitions window.

4. In the Alert Code fields, enter **COLL, Sent to Collection Agency**.

5. Click the OK button.
   axiUm closes the Chart Tracking Lock Definitions window and returns to the Chart Tracking Locks window.

6. Click (close).
   axiUm closes the Chart Tracking Locks window and returns to the Maintenance module.

7. Open the Users window.
   Go to Maintenance module - Office tab - Users icon - Users List window - run search - (Edit Record).

8. Go to the Additional tab’s Charts section, and in the Errors field, enter **Electronic Chart Locks**.
9. Click the Save button.
   axiUm saves the changes.

10. Click the Close button.
    axiUm closes the Users window and returns to the Uses List window.

11. Click \(\text{X}\) (close).
    axiUm closes the Uses List window and returns to the Maintenance module.

12. Open the Patient Info window.
    Go to Rolodex module - patient selection list - highlight patient - \(\text{Edit Patient}\).

13. Go to the Codes tab’s Patient Alerts section, and in the Alert 1 field, enter \text{COLL},
    Sent to Collection Agency.

14. Click the Save button.
    axiUm saves the changes.

15. Click the Close button.
    axiUm closes the Patient Info window and returns to the Rolodex module.

Then when you go to the Patient Appointments window or the Family Appointments window (in
Scheduler module - \(\text{Rolodex}\) - Rolodex (Select Patient) window - select the patient record
containing the chart lock), you can still plan appointments, book appointments, and reschedule
appointments. axiUm should disallow you from these tasks.

**Solution:** Fixed so that axiUm displays the Electronic Chart Lock Error message when you go to
the Patient Appointments window or the Family Appointments window and click one of the
following buttons:

- Make New
- Schedule
- Reschedule
- Sch. w/Expert
This prevents you from doing the following:

- Create a new appointment record
- Book an existing appointment (e.g. If a planned appointment already exists, you cannot book it)
- Reschedule an existing appointment
- Book an appointment in the Appointment Expert window.

126203 - Update Criteria Below right-click option not working

**Module**: Scheduler - Availability tab

**Problem**: If you highlight a record in the Request tab and select the Update Criteria Below right-click option, axiUm updates the date field in the status bar, and this is fine. However, if you repeat this for a different record (in the same clinic), axiUm retains the date from the previous record.

**Solution**: Fixed so that axiUm updates the date field.

126631 - You can add a deleted treatment to a new appointment

**Module**: Scheduler ~ Appointment Treatments window

**Problem**: In some cases, the Appointment Treatments window's Planned Treatments list view displays deleted planned treatments. This lets you add deleted treatments to a new appointment.

**Solution**: Fixed so that in the above scenario, axiUm no longer displays deleted appointments in the list view.

127125 - Deleting work schedule exception causes SQL error

**Module**: Scheduler ~ Work Schedule Exception window

**Problem**: In the Work Schedule Exception window (in Scheduler module - (Work Schedules) - Provider Working Schedules window - (Work Schedule Exception)), if you delete a record for
which the selected provider has a booked appointment on that day, axiUrn asks if you would like to undo this appointment.

If you click the Yes button, axiUrn displays an SQL error.

Solution: Fixed so that in the above scenario axiUrn no longer displays the SQL error.

127234 - Strange display behavior of Weekly tab

Module: Scheduler - Weekly tab

Problem: This problem sometimes occurs if the Scheduler has the following setup:

- Displays cancelled appointments
  In the Scheduler module - (Options/Settings) - Scheduler Options window - Options section, the Cancelled checkbox is selected.

- The provider ID displayed in the Scheduler window's status bar is the same provider that is scheduled for the selected appointment

Then in the Active tab you reschedule this appointment, drag the appointment block outside the Scheduler window, and then cancel the appointment block, the Weekly tab shows blank and the time column displays strange time.

Solution: Fixed so that in the above scenario, axiUrn displays the Weekly tab normally.
127266 - Drop-down field is cut off

**Module:** Scheduler ~ Additional Appointment Info window

**Problem:** In the Additional Appointment Info window (in Scheduler module - (Expert) - Appointment Expert window - More Appts button), clicking on the Code drop-down field displays a list of options. The code portion displays properly, but the description portion is cut off.

![Image of drop-down field](image)

**Solution:** Fixed so that the drop-down field displays the description in full.

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117468 - Improved wording on window

**Module:** Scheduler ~ Appointment Expert Options window

**Problem:** In the Appointment Expert Options window (in Scheduler module - (Expert) - Appointment Expert window - Options button), the explanations for the options are confusing. Need to improve the wording to make it clearer.

**Solution:** Fixed the wording displayed in the Appointment Expert Options window:

Current:
5.11 Bug Fixes

Modified: 30-Nov-12
Summary of changes:

**Discipline Search base on** section:

- option: Session or Daily Layout setup
  static text (new): Used with 'Search on Reserved Chairs' or 'Search on Available Chairs'

- option: Provider Schedule Ideal Day Preferences option
  static text (rewored): Used with 'Search on Reserved Chairs' only

**Instructor Search based on** section:

- option: Session or Daily Layout setup
  static text (new): Used with 'Search on Reserved Chairs' or 'Search on Available Chairs' -- but not when using 'Book's Open Hours'

- option: Instructor Work Schedule setup
  static text (rewored): Used with 'Search on Reserved Chairs' or 'Search on Available Chairs'

**Appointments section:**

- option: 'Make Appts' button will schedule automatically at time selected
  static text (reworded): Used with 'Search on Reserved Chairs' only

- option: 'Make Appts' button will schedule automatically and auto-add Reserve
  static text (rewored): Used with 'Search on Available Chairs' only

---

**127514 - Booking rescheduled appointment causes crash**

**Module:** Scheduler - Weekly tab

**Problem:** In some cases, when you reschedule an appointment and use Appointment Expert window to book it, axiUm crashes.

**Setup:**

1. Open the Books window.
   Go to Scheduler – (Book) – Appt. Books window – Modify button.

2. Deselect the Book has reservations checkbox.

3. Click (close).
   axiUm closes the Books window and returns to the Appt. Books window.

4. Click the Select button to select the book you set up.

5. Click (close).
   axiUm closes the Appt. Books window and returns to the Scheduler module.

6. Open Scheduler Options window.
   Go to Scheduler - (Options/ Settings).

7. Go to the Scheduler Type section and select the Book option.
8. Click the Accept button.

axiUm saves the changes, closes the Scheduler Options window, and returns to the Scheduler module.

Steps to replicate:

1. In the Scheduler window's Active tab, select a rescheduled (yellow hovering) appointment block and right-click to display a list of options.

2. Select the Appointment Expert option to display the Appointment Expert window.

3. Select the following fields and options:
   - Search on Available Chairs: selected
   - Based on Appt Book: selected

4. Click the Options button to display the Appointment Expert Options window.

5. Select the following fields and options:
   - 'Make Appts' button will schedule automatically at time selected: selected
   - 'Make Appts' button will schedule automatically and auto-add Reserve: selected
6. Click the Accept button.

_axiUm closes the Appointment Expert Options window and returns to the Appointment Expert window.

7. Click the Search button.

_axiUm runs the search and displays a list of search results.

<table>
<thead>
<tr>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>29/05/2012</td>
</tr>
<tr>
<td>28/05/2012</td>
</tr>
<tr>
<td>28/05/2012</td>
</tr>
<tr>
<td>28/05/2012</td>
</tr>
<tr>
<td>29/05/2012</td>
</tr>
<tr>
<td>29/05/2012</td>
</tr>
</tbody>
</table>

8. From the list view, highlight one of the search results and click the Make Appts button.

_axiUm crashes.

Solution: Fixed so that in the above scenario, _axiUm no longer crashes._

127808 - Appointment History window is missing records

**Module:** Scheduler ~ Appointment History window

**Problem:** If you go to the Patient Appointments window or the Family Appointments window, select a cancelled or failed appointment record, and re-book the appointment using the Appointment Expert window, the Appointment History window (accessed by selecting the booked
appointment - right-click - Show History option) displays all records, and this is fine. However, the Appointment History window for the cancelled appointment omits the cancellation record.

Solution: Fixed so that in the above scenario, axiUm displays the cancelled appointment record.

127932 - Fill from Wait List right-click option not working
Module: Scheduler ~ Appointment Lists window
Problem: Sometimes, when you try filling an appointment from the wait list, axiUm does not fill the appointment.
Solution: Fixed so that in the above scenario, axiUm fills the appointment from the wait list.

Transactions

96221 - Payment code override not clearing
Module: Transactions - Payment tab
Problem: If you have default bank set up on your workstation, and in Power Admin module this is set to red (inaccessible), and in axiUm you clear the payment code associated to the default bank and then select a different code (with no associated bank), the bank field is not cleared or reset to the workstation bank default.

Setup:

1. Set up a payment code and indicate a default bank code (e.g. CA1, Cashier Station 1).
   In Maintenance module - Transactions tab - Payment Codes icon - Payment Codes window, a payment code record (e.g. CA, Cash) has the Bank Default field displaying CA1, Cashier Station 1.
2. Set up a payment code (e.g. AE, American Express) and indicate no default bank code.

3. Set up your Transactions module's workstation options to default the bank code (e.g. CA2, Cashier Station 2).

   In Transactions module - (Options/Settings) - Transaction Options window - Miscellaneous section, the Default Bank field displays CA2, Cashier Station 2.
Usage:

1. Go to Transactions module - Payment tab.

2. Click the New button.
   axiUm clears the fields.

3. In the Code field, enter the payment code CA, Cash.
   In the Bank field, axiUm displays the default bank code CA1, Cashier Station 1.

4. In the Code field, enter the payment code AE, American Express.
   In the Bank field, axiUm still displays CA1, Cashier Station 1. Because the payment code has no default bank code associated to it, axiUm should use the workstation’s default bank code, CA2, Cashier Station 2.

Solution: Fixed so that in the above scenario, axiUm displays CA2, Cashier Station 2, in the Bank field.
101872 - Resubmitting pre-authorizations loses claim history

Module: Transactions ~ Claim Submission History window

Problem: In the Claim Submission History window (in Transactions module - Treatment tab - Planned tab - Claim Submission History right-click option), axiUm shows only the last submitted claim record, even if you submitted and then re-billed the planned treatment multiple times.

Solution: Fixed so that the Claim Submission History window displays all submitted claims.

105552 - Refresh issue (1)

Module: Transactions - Payment tab

Problem: While displaying the Transactions window’s Payment tab, if you open the EHR module and add a treatment record (leaving it unapproved), switching back to the Transactions window’s Payment tab displays $0 in the Unapproved field. axiUm should display the amount of the unapproved treatment entered in the EHR module. This is a refresh issue.

Solution: Fixed refresh issue. Now in the above scenario, the Unapproved field displays the amount of the unapproved treatment entered in the EHR module.

117941 - Refresh issue (2)

Module: Transactions - General tab

Problem: When user1 on workstation1 allocates payments or adjustments for a patient, and simultaneously, user2 on workstation2 does the same for the same patient, axiUm displays the incorrect value in the Amount column and the Applied column. This is caused by a refresh issue.

Solution: Fixed refresh issue. Now axiUm displays the correct value in the Amount column and the Applied column.

117958 - Tx Plan Total field for in-process tx shows incorrect amount

Module: Transactions ~ Edit Appointment window

Problem: If you do something that causes the treatment # to change (e.g. from the EHR module you edit the record, or from the Transactions module’s Treatment tab you either re-bill the in-process treatment or select the In Process Tx Visit right-click option), and then later you apply a payment to this in-process treatment, axiUm excludes this payment from the Edit Appointment window’s the Tx Plan Total field.

Solution: Fixed so that in the above scenario, axiUm updates this field to reflect the payment code.

124277 - Can mark deleted treatment as In Dispute

Module: Transactions - Treatments tab

Problem: If you go to the list view and highlight multiple records (including deleted records), and select the Held in Dispute right-click option, axiUm marks all records (including the deleted
records) as In Dispute. Because deleted treatments no longer exist, it makes no sense to dispute them.

**Solution:** Fixed so that in the above scenario, axiUm no longer marks these treatments as In Dispute.

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**124361 - Only one insurance policy is billed**

**Module:** Transactions - General tab

**Problem:** When a patient has a NY Medicaid policy and another Limited Visits policy, axiUm was allowing both to be billed which was causing some issues when the claim was created This is not a valid scenario and should be prevented.

**Solution:** When creating/approving/rebilling a claim, if a Limited Visits policy is being billed, the user will not be allowed to select any other policy.

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**124476 - Cannot update record by clicking the Modify button**

**Module:** Transactions - Treatments tab

**Problem:** If you make changes to a record (but do not save), and you go to the EHR module and make changes to the same record (and save), and then you return to the Transactions module and click the Modify button, axiUm displays the message, "Deleted procedure cannot be edited" although it was not deleted.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message and updates the record with the changes made in the EHR module.

---

**124594 - Payment discount applied incorrectly**

**Module:** Transactions - Adjustment tab

**Problem:** When there is more than one discount adjustment added on the same day, the second adjustment amount is calculated incorrectly.

**Setup:**

1. Set up your practice to accept discounts.
   
   In the Practice Options window’s Transactions Options section, the Payment discounts checkbox is selected.
2. Setup a payment code with a discount of 10%.

In the Payment Codes window, the Discount field displays an adjustment code (a credit-type adjustment, applicable to charges), and the Percent field displays 10.00.

Steps to replicate:

1. Go to the Transactions window’s Treatment tab.

2. Click the New Claim button.
3. Create two treatments charged 100% to the patient, for example:

- D1120, $40.00, all to patient

![Treatment screen with D1120 entered]

- D1120, $50.00, all to patient

![Treatment screen with D1120 entered]

4. Click the Payment tab.
   The **Today's** field displays $90.00, and this is fine.

![Today's field displaying $90.00]

5. Click the New button.
   axiUm clears the fields.

6. Enter the fields and options:
   - Code: CA, Cash (notice that axiUm immediately calculates $9.00 discount and $81.00 due today, and this is fine)

   ![Today's field displaying discount and due amount]

   - Bank: CA1, Cashier Station 1
   - Amount: $81.00
7. Click the Add button.

axiUm adds the new record to the list view.

![List View Example](image)

8. Click the Adjustment tab.

In the list view, the **Amount** column heading displays -$9.00, and the **Applied** column heading displays -$9.00.

![List View Example](image)

You have successfully added the first claim, and axiUm correctly applied the discount.

Next, we will add a second claim.

9. Click the Treatment tab.

10. Click the New Claim button.

11. Create two treatments charged 100% to the patient, for example:

   - D1120, $30.00, all to patient
• D1120, $20.00, all to patient

12. Click the Payment tab.
   The Today's field displays $50.00, and this is fine.

13. Click the New button.
   axiUm clears the fields.

14. Enter the fields and options:
   • Code: CA, Cash (notice that axiUm immediately calculates $5.00 discount and $45.00 due today, and this is fine)
   • Bank: CA1, Cashier Station 1
   • Amount: $45.00

15. Click the Add button.
   axiUm adds the new record to the list view.
16. Click the Adjustment tab.

In the list view, the **Amount** column heading shows -$5.00 and this is fine. However, the **Applied** column heading shows -$8.10, and this is incorrect (it should display -$5.00).

### Solution:
Fixed so that in the above scenario, the applied amount is the same as the adjustment amount. In our example, this is -$5.00 (not -$8.10).

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**124642 - Ortho Billing sending items to Print Held area**

**Module:** Transactions - Pmt Plan tab

**Problem:** If the Ortho Billing Options window (in Maintenance module - System tab - Processes icon - Processes window - Ortho Billings button) has the **Submit via EDI submissions** checkbox selected, and you do the following:

- Run ortho billings from the Maintenance module (in Maintenance - System tab - Processes icon - Ortho Billings button - Ortho Billing window):
  axiUm batches them for EDI, and this is fine.

- Run ortho billings from the Transactions module (in Transactions module - Pmt Plan tab - Ortho Billing button):
  axiUm sends the EDI claims to the Print Held area.

**Solution:** Fixed so that in the above scenario, axiUm batches the claims for EDI submission.
125088 - Patient statements show duplicate insurance payments

Module: Transactions ~ Statement report

Problem: Sometimes, when you allocate a payment to both a regular payment and a payment plan, the patient statement (in Transactions module ~ Treatment tab ~ Statement button ~ Statements window ~ Print button ~ Statement report) displays the insurance payment twice.

Solution: Fixed so that the insurance payment on the Statement report no longer displays duplicate records.

125367 - Cannot rebill from patient to NY Medicaid

Module: Transactions ~ Rebill Treatments window

Problem: When you rebill a claim from patient to NY Medicaid, axiUm displays the error message, "The episode rate code must be selected".

Solution: Fixed so that in the above scenario, axiUm no longer displays the message and you can rebill the claim. axiUm displays this message only when you bill from NY Medicaid to NY Medicaid.

125369 - Cannot rebill from NY Medicaid to NY Medicaid

Module: Transactions ~ Rebill Treatments window

Problem: If there is a $0 payment on the claim, and you rebill the claim from NY Medicaid to NY Medicaid, axiUm displays a message indicating that a paid/adjusted claim cannot be rebilled.

Solution: Fixed so that in the above scenario, axiUm no longer displays this message and you can rebill the claim. Note that axiUm still warns you that a payment/adjustment exists and will be moved to rebilled items.

125383 - Incorrect message

Module: Transactions ~ Rebill Treatments window

Problem: When you rebill a treatment to NY Medicaid and no visits exist on the same day, axiUm bills the patient $0, and this is fine. However, axiUm displays the message, “These treatments are not covered by Medicaid. If you continue, the patient will be billed.” This message is incorrect.

Solution: Changed the message to display, “Medicaid does not cover these treatments. If you continue, the treatments will be billed with a zero amount.”

125469 - Incorrect estimate amount

Module: Transactions ~ General tab

Problem: Sometimes the estimate shown in the Unapproved sub-tab is incorrect. This is because axiUm includes the deductible when you change from Planned status to In Process status.

Solution: Fixed to show the correct amount.
125683 - Problem billing treatments to NY Medicaid

**Module:** Transactions

**Problem:** This applies to changing treatment status in Transactions for patients using NY Medicaid insurance (limited-visit policy). If you enter a treatment in Transactions as status In Process or status Completed, and then you bill the claim to NY Medicaid, axiUm creates a separate claim for the treatment and bills the patient $0, and this is fine. However, if you enter the treatment as status Planned or status In Process and then change this status from Transactions (P->I, P->C, I->I, I->C), axiUm does not maintain the same behavior, and it should.

Note: When a treatment is entered in EHR, axiUm will only bill the patient at $0 if there is a Medicaid visit existing for the same day. Otherwise, the user will be warned that the treatment is not covered by Medicaid and the patient will be billed.

**Solution:** Fixed so that in the above scenario, axiUm will bill the patient $0. Note the following exception to this behavior:

axiUm retains the amount charged at the in-process status when all of the following conditions are met:

- You selected to bill the claim at the start of the treatment (in Practice Options window - Transactions Options section, the **Bill total amount at start of In Process** drop-down field displays either of the Yes options).
- You used the EHR module to enter the in-process treatment with a charge, then you change the status (I->I, I->C) from either the EHR module or the Transaction module.

Note: If you would like to charge the patient regardless of whether or not there is a covered Medicaid treatment on the same day or not, there is a new enhancement to allow this. For more information on this enhancement, refer to the Enhancement document and see 124137.

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125949 - Incorrect amount when steps are involved

**Module:** Transactions - Payment tab

**Problem:** In a procedure involving steps, there is a problem with the amount when completing the last step of an unapproved treatment.

**Solution:** Fixed.

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126225 - Statement report uses incorrect opening balance

**Module:** Transactions ~ Patient Receipt report, Guarantor Receipt report (new)

**Problem:** In the Statement report (in Transactions module - Payment tab - Receipt button - Receipt Printout window - Print button), the opening balance (displayed if you are viewing custom reports) is the sum of the absolute value (i.e. disregarding "+" and "-" amounts) of all payments
displayed in the report, plus the absolute value of the balance (the amount displayed in the Balance section). The opening balance should be the balance before the selected receipt date.

Solution: Fixed so that the opening balance is the balance before the selected receipt date.

126300 - Problems rebilling struck-out treatment record
Module: Transactions - Treatment tab
Problem: This applies to NY Medicaid only. If you rebill a struck-out, in-process treatment record, axiUm creates a history record indicating it was deleted. This may cause A/R reconciliation report balancing issues.
Solution: Fixed so that in the above scenario, axiUm no longer creates a deletion history.

126419 - Transactions Notes tab display issue
Module: Transactions - Notes tab
Problem: If your workstation is running Windows 7 and you press the ALT key, axiUm hides some of the screen elements.
Solution: Fixed so that in the above scenario, the fields are always displayed.

126429 - Claim Remittance Advice Remarks icon is incorrect
Module: Transactions ~ Explanation of Benefits (EOB) Details window
Problem: In the Explanation of Benefits (EOB) Details window (in Transactions module - Treatment tab - EOB Details right-click option), axiUm is using the incorrect Claim Remittance Advice Remark icon.
Solution: Fixed to use the correct icon.
**127085 - Guarantor receipt displays incorrect name**

**Module:** Transactions ~ Guarantor Receipt report

**Problem:** If the Guarantor Receipt is a custom report that includes the selected guarantor's name, axiUm shows this name on all payment lines, even those of their dependents.

Steps to replicate:

1. Open the Receipt Printout window.

2. Enter the following:
   - Include payment only: deselected
   - For Guarantor: selected

![Receipt Printout Window]

3. Click the Print button.

   axiUm displays the Guarantor Receipt report, showing payments that the selected guarantor made towards their own account, plus any other account for which they are responsible for paying (i.e. dependents). However, all payment lines (including those made towards dependents) show the guarantor's name.

**Solution:** Fixed so that in the above scenario, payments made to dependents show the dependent's name.
127136 - Payment tab Held For combo displays incorrect data

Module: Transactions - Payment tab

Problem: If you go to the Payment tab and from the list view you select a payment record, then you click on a different tab and return to the Payment tab, the Held For drop-down field displays the current patient. It should display the patient + payment type associated to the highlighted record.

Steps to replicate:

1. From the Rolodex, select a patient. For our example, we will select John Doe.

2. Go to the Transactions module’s Payment tab.

3. From the list view, highlight a record.

   The Held For drop-down field displays the name of the patient this payment is held for (i.e. Jane’s payment plan).
4. Click on a different tab. For our example, we will select the General tab.

5. Click on the Payment tab again.
   The Held For drop-down field now displays the currently selected patient (i.e. John).

**Solution:** Now in the above scenario, axiUm retains the correct information displayed in the Held For drop-down field.
axiUm Release 5.11.01

EDI Claims

127876 - Invalid code used in attachment section of EDI claims
Module: EDI Claims ~ EDI Claims window
Problem: When the claim attachment value File Transfer is selected, axiUm populates the PWK 02 segment using the value FL instead of FT.
Solution: Fixed to use the value FT.

127906 - Attachments on claims causes crash
Module: EDI Claims ~ EDI Claims window
Problem: When you open an EDI Claim window for a medical claim (e.g. 4010 or 5010), and you indicate an attachment type in the Claim Attachment drop-down field and a reference number in the Attachment Reference # field, clicking the OK button causes axiUm to crash.
Solution: Fixed so that in the above scenario, axiUm no longer crashes.

127941 - Missing EDI claim attachment information
Module: EDI Claims ~ EDI Claims window
Problem: When you open an EDI Claim window (e.g. HCFA Medical Insurance Claim [EDI Claim] window), any claim attachment type and reference number you entered is missing.
Solution: Fixed so that in the above scenario, this information is displayed.

127959 - Claim Attachment issue with comment field
Module: EDI Claims ~ EDI Claims window
Problem: For paper claims, if you submitted or held the claim containing attachment information, axiUm adds this information to the comment section of the claim, and this is fine. Then before printing the claim, if you change or remove the attachment information, axiUm fails to change or remove this from the comment section.
Solution: Fixed so that in the above scenario, axiUm updates the comment section.
128211 - ICD-9 codes print on claim forms instead of ICD-10 codes

Module: EDI Claims ~ EDI Claims window

Problem: If you set up axiUm to use ICD-9 codes, and you print the paper claims, axiUm displays ICD-10 codes instead.

Solution: Fixed so that in the above scenario, axiUm displays ICD-9 codes.

129228 - Auto Batch Claim Error Warning window is not displaying

Module: EDI Claims ~ EDI Claims window

Problem: When you select a rate-based NY Medicaid claim that has already been batched (and contains errors), and you add new treatment records to this claim, axiUm fails to display the Auto Batch Claim Error Warning window.

Solution: Fixed so that in the above scenario, axiUm displays the Auto Batch Claim Error Warning window.

129275 - DMG & PAT*04 segments causes claim rejections

Module: EDI Claims ~ EDI Claims window

Problem: Previously, for payors using 4010 claim format, you were required to convert claims to 5010 claim format before submitting the claim. To facilitate this conversion, Emdeon required you to include the DMG (Other Insured Demographics) segment and the PAT*04 (Patient Student Status) segment in the claim submission. However, as of July 1, 2012, all payors must use 5010 format, and therefore EDI 5010 Medical and Dental claims no longer require these segments for conversion purposes. Including this information in your claim submission now causes Emdeon to reject these claims.

The station options for converting these segments for EDI 5010 Medical and Dental claims are located in the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options) - Station Options window - EDI Claims section - Claim Formatting section:

- X12N50DenReqByEmdeon item
- X12N50MedReqByEmdeon item

These station options indicate whether or not the REF*G5 segment, the DMG segment, and the PAT*04 segment are all included.

Solution: Now these station options indicate to include only the REF*G5 segment, and excludes the DMG segment and the PAT*04 segment.

EHR
**126454 - Facility drop-down field is cut off**

**Module:** EHR ~ Treatment Billing Information window

**Problem:** When you go to the Treatment Billing Information window’s Facility drop-down field to display the options, the descriptions are cut off.

**Solution:** Fixed to display the entire description.

Also fixed similar problem with the Facility drop-down field in the Rebill Treatments window (in Transactions module - Treatment tab - Rebill Claim drop-down field or Rebill Treatment drop-down field).

---

**128009 - Notes are saved under incorrect patient**

**Module:** EHR - Notes tab

**Problem:** Sometimes, when you enter a clinical note, axiUrn saves it in a different patient record.

**Solution:** Fixed so that axiUrn saves the note with the correct patient record.

---

**128236 - SQL error**

**Module:** EHR ~ EHR Options window

**Problem:** This problem occurs in 5.11.00 only. If the currently selected patient has an appointment with at least one planned or in-process treatment, and the EHR Options window’s Sort Options section’s Show appointment’s treatments checkbox is selected, axiUrn displays an SQL error and crashes.

**Solution:** Fixed so that in the above scenario axiUrn no longer displays the SQL error or crashes.

---

**128265 - In-process treatment not updating provider**

**Module:** EHR - In Progress tab

**Problem:** If you select an in-process treatment record that was entered by another provider, and you make changes to this record, axiUrn asks if you want to change the provider on this record to yourself. If you select to do so, axiUrn still displays the last provider on this record.

**Solution:** Fixed so that in the above scenario, axiUrn displays you as the provider.

---

**128305 - Unnecessary error message**

**Module:** EHR - Forms tab

**Problem:** If providerA on workstationA adds an EPR form for patientA (leaving the EPR form open to the EPR Question Details - Spreadsheet window), and then providerB on workstationB adds the same EPR form for patientB, axiUrn displays a message indicating that this question is already being answered by another user.

**Solution:** Fixed so that in the above scenario, axiUrn no longer displays this message.
128462 - Problems printing the estimate report

Module: EHR ~ Estimate window

Problem: If the estimate report is set up so that the title uses all available space, and then you print the estimate report, axiUm crashes.

Steps to replicate:

1. Go to the EHR window’s Tx History tab.

2. Click (Estimate) to display the Select Planned Treatments window.

3. From the list view, highlight a record.

4. Click the OK button.
   axiUm displays the Estimate window.
5. Enter the following fields and checkboxes:
   - Title: In this field, enter enough characters to fill the field length
   - Student: Select this checkbox
   - Instructor: Select this checkbox
   - Patient: Select this checkbox

6. Click the Print button.
   axiUm prints the estimate report to the default printer and displays the Patient Signature window.

7. Enter the signature and click the OK button.
   axiUm saves the signature, closes the Patient Signature window, and returns to the Estimate window.

8. Click Close.
   axiUm closes the Estimate window, returns to the Select Planned Treatment window, and then crashes.

Solution: Fixed so that in the above scenario, axiUm no longer crashes.

128643 - EHR display issues when hovering over icon list arrow
Module: EHR
**Problem:** In some tabs, if you minimize the right-hand icons and hover over the arrow to display these icons, a display issue causes the underlying text to show on top of these icons.

**Solution:** Fixed the display issue.

---

**128871 - Error message preventing completion of upper arch txs**

**Module:** EHR - Chart Add tab

**Problem:** If you add a procedure code for the upper arch, and then try editing the procedure status, axiUm displays an error message. This error message prevents the completion of any upper arch treatments in the system.

**Solution:** Replace the error message with the appropriate warning message that allows the user to acknowledge the message and complete the treatment.

---

**128995 - Unable to delete planned treatments**

**Module:** EHR - Tx History tab

**Problem:** This problem occurs if you have the following setup in Users window’s Clinical tab’s Clinical Options section:

- **Edit/Delete I or C Txs:** From this drop-down field, select the No option
- **Delete Txs:** From this drop-down field, select the Planned only option

Then when you add a planned treatment and then try to delete it from the Tx history tab, axiUm displays the message, “You do not have access to modify or delete treatments.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message for planned treatments, but still displays it for in-process or completed treatments.
Note: This bug fix reversed a previous bug fix 124133 (see 5.10 Bug Fix doc). This re-introduces the problem, but was necessary to fix 128995.

---

**129038 - Symbols in drug description causes crash**

**Module:** EHR - Medications tab

**Problem:** Adding a medication record or a prescription record for which the drug description contains an apostrophe ('), causes axiUm to display a Database Warning window and then crash.

Steps to replicate:

1. Go to EHR module's Medication tab.

2. Click (Create a new Record) and select the New Prescription option to display the Patient Prescription Entry window.

3. From the Drug drop-down field, select a drug. For our example, we will select 'Amoxicillin' (including the single quotes).

4. Click (Add a new Record).

   axiUm displays the Database Warning window, then crashes.
The same problem occurs in the Patient Medication Entry window (in EHR module - Medication tab - (Create a new Record) - Existing Medication option).

**Solution:** Fixed so that in the above scenario, axiUm no longer displays the Database Warning window.

---

**129039 - Unnecessary AUDITHIS records are created**

**Module:** EHR - Medications tab

**Problem:** When you add or edit medication records, axiUm creates duplicate AUDITHIS records, resulting in extraneous data.

**Solution:** Fixed so that axiUm creates only one AUDITHIS record.

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**Evaluations**

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**116314 - Window flickers**

**Module:** Evaluations ~ Add/Edit Evaluation window

**Problem:** Sometimes, when you are in the Add/Edit Evaluation window entering in the Instructor field, the window flickers.

**Solution:** Fixed so that the window no longer flickers.

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**General**

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**128448 - Problems with SQL for allocating patient payments**

**Module:** Database

**Problem:** This affects version 5.10 only. The overnight process that allocates patient payments causes axiUm to show the incorrect amount in the Applied column and create no history record.

**Solution:** Fixed.

---

**128877 - Separators are missing from list of options**

**Module:** GUI

**Problem:** If axiUm is set up to hide disabled menus, and you log onto axiUm as a user whose user level contains a red-based role, axiUm hides the separators from the menu options.
Setup:

1. Open the Station Options window.
   Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).

2. Go to General section - Menu section - HideDisabledMenus item.

3. In the Current Value field, enter 1 (Yes).

4. Click (close).
   axiUm closes the Station Options window and returns to the Maintenance module.

Steps to replicate:

1. Log onto axiUm as a user with a red-based role.
2. Click on the Tools menu.
   The menu options are missing separators.

![Tools menu](image)

**Solution:** Fixed this problem throughout axiUm.

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**Info Manager**

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**128342 - A/R Reconciliation report using incorrect patient name**

**Module:** Info Manager ~ A/R Reconciliation report

**Problem:** This problem occurs if you allocated a single patient payment (e.g. father) to treatments for multiple patients (e.g. the mother and daughter). Then when you run the A/R Reconciliation report and select the "for All" option, axiUm displays this single payment under the name of the paying patient rather than displaying the payment breakdown by patient allocation. This could cause problems, for example, if the report is grouped by a patient field, payments may show under the wrong group.

**Solution:** Fixed both the standard and custom A/R Reconciliation reports to show payments allocated to multiple patients.

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**129111 - Ortho notes displaying as lab notes**

**Module:** Info Manager ~ Clinical Notes report

**Problem:** When you run a pre-defined Clinical Notes report (by going to Info Manager module - Clinical tab - Clinical Notes category - Pre-Defined button) and you selected to display the Note Type column (by going to Select Report window - New button - Report Definition window - Note file - Note Type field), when you run the report axiUm displays the text Lab Note when it should display the text Ortho Note.

**Solution:** Fixed so that the Note Type column indicates the correct note type.
129132 - Patient Office Charges report excludes some records

**Module:** Info Manager ~ Patient Office Charges report

**Problem:** When you run a Patient Office Charges report (in Info Manager module - Billing tab - Patient Office Charges category - Search button), and you include the Practice ID in the report, axiUm excludes those records with no practice.

**Solution:** Fixed so that in the above scenario, axiUm includes these records in the report.

---

129194 - Auto-update not working (1)

**Module:** General

**Problem:** When axiUm detects the availability of a newer version, and you select to run the auto-update, it displays the message, "You have an older version of the application. Do you want to update it?" If you click the Yes button, it displays an error message. This was caused by long report names preventing the creation of the log file.

**Solution:** Fixed so that in the above scenario, no error message displays and axiUm auto-updates.

---

129211 - Auto-update not working (2)

**Module:** Auto Update

**Problem:** When axiUm detects the availability of a newer version, and you select to run the auto-update, it creates a log file even if you turned this option off (i.e. the CpAxium.ini file has the LogAutoUpdate = 1).

**Solution:** Fixed so that axiUm creates a log file only if you turn off this option.

---

**Maintenance**

124880 - Change in grd_temp.rpt

**Module:** Maintenance ~ Grading Forms report

**Problem:** If you preview or print the Grading Forms report, axiUm displays the questions by their code, not in the order set up in the Grading Form Card window.

**Solution:** Fixed. axiUm now prints the questions in the Grading Forms report in the same order that these questions are displayed in the Grading Form Card window.

---

125268 - Pressing Alt + T not working

**Module:** Maintenance ~ EPR Form Setup widow

**Problem:** In the EPR Form Setup window, pressing ALT + T should display the Form Instructions window, and it does not.
5.11 Bug Fixes

127695 - Billing doctor information not being saved.

**Module**: Maintenance ~ Billing Doctors / Schedules List window.

**Problem**: When you access the Billing Doctors / Schedules List window from the Users window - Clinical tab - Clinical Options section - Billing ID field (ellipsis), and you change the billing doctor information, when you access the same window from the Maintenance module - Office tab - Billing Doctors & Fee Schedules icon, the same record is not updated.

**Solution**: Fixed so that changes are reflected in both areas.

127926 - Strange behavior in predefined columns

**Module**: Maintenance ~ Form Column Details window

**Problem**: In the Form Column Details window, when you change the answer type for a spreadsheet column heading (by going to the Column Heading Type drop-down field and selecting a different option), the Pre-defined Columns window (accessed by clicking the Pre-defined Columns button) clears columns created from the previous answer type.

**Solution**: Now in the above scenario, if pre-defined columns exist, axiUm displays a warning that changing the column heading type will delete the current pre-defined columns.

128386 - Field value changes

**Module**: Maintenance ~ Template Age-specific Coverage window

**Problem**: In the Template Age-specific Coverage window (in Maintenance module - Insurance tab - Coverage Templates icon - Coverage Template List window - (Coverage Items) - Edit Coverage Template window - (Age-specific Coverage Details)), if you create two records each containing different field values, then you go back to the Edit Coverage Template window and click (Modify), and then return to the Template Age-specific Coverage window, the two records you created now display the same field values.

**Solution**: Fixed so that in the above scenario, axiUm retain the values you entered.

128491 - Misplaced station options item

**Module**: Maintenance ~ Station Options window

**Problem**: Go to the Maintenance module - System tab - Station Options icon - Station Options window, and then go to Transaction branch - Payment Plan branch - DefaultPaymentPlanType item. This item should be located in the Transactions branch not the Transaction branch.
Solution: Fixed by moving the DefaultPaymentPlanType item into the Transactions branch - Payment Plan branch, and removing the Transaction branch.

128880 - Importing provider schedule creates blank value

Module: Maintenance ~ Provider Import window

Problem: When you import a provider schedule (in Maintenance module - Office tab - Provider Import icon - Provider Import window), and you view the provider record (in Maintenance module - Office tab - Users icon - Users List window - run a search - ![Edit Record] - Users window - Provider tab - Scheduler section), the 2nd Provider Sched. For field is blank.

Solution: Fixed so that in the above scenario, axiUm imports all provider details.

129034 - Procedure Code window’s Surf. Number field is disabled

Module: Maintenance ~ Procedure Code window

Problem: If you go to the Procedure Code window (in Maintenance module - Clinical tab - Procedure Code icon - Procedure Code List window - run a search for conditions or materials - select a record from list view - ![Modify Record]), and in the Graphic Details section you select the following:

- Type: Illustrated
axiUm disables the Surf. Number field. This was enabled in version 5.00.

**Solution:** Fixed by enabling this field again.

---

**Ortho Manager**

**126281 - Buttons should be disabled**

**Module:** Ortho Manager

**Problem:** When you add a form, those buttons disabled in the EHR module should also be disabled in the Ortho Manager module.

**Solution:** Fixed. Also fixed similar problem in the Perio Chart module.

---

**128003 - Overlapping screen elements**

**Module:** Ortho Manager

**Problem:** If your workstation runs on Windows 7 and you set up axiUm to use a low resolution, some screen elements in the Ortho Manager module overlap each other.

**Solution:** Fixed.

---

**Patient Card**

**128602 - Non-patient guarantors are excluded from search results**

**Module:** Patient Card ~ Guarantor Rolodex window

**Problem:** When you run a search in the Guarantor Rolodex window, axiUm excludes non-patient guarantors in the search results.

**Solution:** Fixed so that search results include non-patient guarantors.
104815 - Cannot find message box

**Module:** Power Admin

**Problem:** If you go to the axiUm application, and in the Users window you update a field, axiUm displays a message asking if you want to update this field for all users of this level. This message can be displayed in one of two windows:

- Update Other Users Warning window
- Update Other Providers Warning window

These message boxes are missing from the Power Admin module.

**Solution:** Fixed so that both windows are included in the Power Admin module.

122560 - Renamed windows

**Module:** Power Admin

**Problem:** Need to rename Power Admin windows to accurately reflect the title of its corresponding axiUm windows.

**Solution:** Changed the following window names:

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employers List</td>
<td>Employer List</td>
</tr>
<tr>
<td>Add/Edit Employer</td>
<td>Employer</td>
</tr>
<tr>
<td>Material Codes List</td>
<td>Material List</td>
</tr>
<tr>
<td>Add/Edit Material</td>
<td>Material</td>
</tr>
</tbody>
</table>

127846 - Levels involving administrator roles are not working

**Module:** Power Admin

**Problem:** If you create a level containing both an administrator role and a non-administrator role, assigning this level to a user restricts their access. This violates two rules:

- Administrator always has full access to the system.
- The role with the greater access rights encompasses the role with the lesser access rights.
This results in users with administrator-level rights unable to access all parts of axiUm.

**Solution:** Fixed so that in the above scenario, axiUm grants the maximum user rights.

---

**128166 - Cannot display Print List Options window**

**Module:** Power Admin ~ Print List Options window

**Problem:** When you try opening the Print List Options window, axiUm displays an error message.

![Error message](image)

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message.

---

**128263 - Menu item not working**

**Module:** Power Admin

**Problem:** Go to Main Program - Maintenance - Clinical and select only the Tx Disciplines checkbox (all other checkboxes are deselected). When you open axiUm and go to the Maintenance module’s Clinical tab, all icons including the Tx Disciplines icon is hidden.

**Solution:** Fixed so that in the above scenario, the Tx Disciplines icon in axiUm is shown.
128333 - Missing items

**Module:** Power Admin

**Problem:** The following menu items are missing:

- Eligibility Rejection Reason Codes
  In Main Program - Maintenance - Insurance

- Status Bar Indicators
  In Main Program - Maintenance - System

**Solution:** Fixed so these menu items are displayed in the Power Admin module.

128680 - Rolodex right-click options are unavailable

**Module:** Power Admin

**Problem:** When the default access is set to red (i.e. no access), the Rolodex module's right-click options are unavailable.

**Setup:**

5. Open axiUm.
6. Open the Station Options window.
   Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).
7. Go to General section - Menu - section HideDisabledMenus item.
8. In the Current Value field, enter 1 (Yes).
9. Click (close).

axiUm closes the Station Options window and returns to the Maintenance module.

Steps to replicate:

1. From the Power Admin main window, go to the first drop-down field and select the Level option.

2. From the second drop-down field, select an option. For our example, we will select the Rolodex - Read Only option.

   Make sure this role is defaulted to No Access by going to the File menu - Roles option - Roles window and make sure the Default Rights drop-down field displays the No Access (all red) option.

3. Go to the Menus section - Rolodex section - Rolodex item. Make sure some checkboxes are selected for access to these fields.
4. From the Power Admin main window, go to the first drop-down field and select the Role option.

5. From the second drop-down field, select an option. For our example, we will select the Rolodex - Read/Write option.

Make sure that this role is defaulted to No Access by going to the File menu - Roles option - Roles window and making sure the Default Rights drop-down field displays the No Access (all red) option.

6. Go to the Menus section - Rolodex section - Rolodex item. Make sure some checkboxes are selected for access to these fields.
7. Login to axiUm as a user assigned to the role you set up above.
8. Open the Rolodex module and right-click anywhere.

axiUm displays no right-click menu options.

Solution: Fixed so that in the above scenario, axiUm displays the right-click menu items and are enabled/disabled according to the Power Admin setup.

128681 - Menu item available only if role is default green access

Module: Power Admin

Problem: axiUm does not display the Select Teeth right-click menu option on the odontogram, even if you gave the level or role access rights to this option.

Setup:
1. Open axiUm.
2. Open the Station Options window.

Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).
3. Go to General section - Menu - section HideDisabledMenus item.

4. In the Current Value field, enter 1 (Yes).

5. Click (close).
   
   axiUm closes the Station Options window and returns to the Maintenance module.

Steps to replicate:

1. From the Power Admin main window, go to the first drop-down field and select the Level option.

2. From the second drop-down field, select an option.

3. Go to the Menus section - EHR section - Chart item. Make sure all the Select Teeth type checkboxes are selected for access to these fields.
4. From the Power Admin main window, go to the first drop-down field and select the Role option.

5. From the second drop-down field, select an option. For our example, we will select the EHR/Pat Attach - Read/Write option.

   Make sure that this role is defaulted to No Access by going to the File menu - Roles option - Roles window and making sure the Default Rights drop-down field displays the No Access (all red) option.

6. Go to the Menus section - EHR section - Chart item. Make sure all the Select Teeth type checkboxes are selected for access to these fields.

   ![Image of Menus and Fields]

7. Login to axiUm as a user assigned to the role you set up above.

8. Go to the EHR window's Odontogram section and right-click.

   axiUm displays no Select Teeth option or its sub-options.

   ![Image of Odontogram and Right-Click Menu]

**Solution:** Fixed so that in the above scenario, axiUm displays these right-click menu items.
129230 - Factoring Co field is missing

**Module:** Power Admin

**Problem:** This applies to Dutch version only. When you go to Dialogs branch - PATIENT AREA branch - Patient Codes item, the Patient Codes window, the Factoring Co. drop-down field is missing.

**Solution:** Fixed to display this field.
129690 - Opening window causes error message

**Module:** Power Admin

**Problem:** When you try opening the Patient Deductible with Family Max. Warning window, axiUm displays an error message.

**Steps to replicate:**

1. **Open the Find Dialog window.**
   
   Right-click anywhere in the left panel to display a list of options and select the Find Dialog option.

2. **In the Criteria field, enter** Patient Deductible with Family Max. Warning.

3. **Click the Search button.**
   
   axiUm displays the search result in the list view.
4. Click the Go To button.

axiUm displays the ObjectWindows Exception window.

Solution: Fixed so that in the above scenario, displays the Patient Deductible with Family Max. Warning window and no longer crashes.

---

**Rolodex**

**128017 - Regenerated password not working**

Module: Rolodex ~ Internet Access window

Problem: If you go to the Patient Info window - Personal tab - Information section - Internet Access button - Internet Access window - Account tab - Logon Information section, clicking the Regenerate button creates a new temporary password, and this is fine. However, when the patient uses this password to log on to the axiUm PatientAccess application, they are sometimes denied access. This happens when the generated password contains special characters.

Solution: Fixed so that in the above scenario, the patient can log into the axiUm PatientAccess application. This does not affect current passwords.
127183 - Rebooking causes crash
Module: Scheduler

Problem: When you book an appointment for a patient with multiple primary faculty assignments, axiUm displays the same appointment multiple times.

Solution: Fixed to prevent axiUm from crashing when re-booking appointments.

127696 - Unnecessary message (1)
Module: Scheduler - Chair tab

Issue: In some cases, if you reserve a chair containing a non-clinic time, axiUm displays a message indicating that doing so will cancel the chair's non-clinic time. Selecting to continue displays the message, "This chair has already been reserved." This message is unnecessary.

Solution: Fixed so that in the above scenario, axiUm no longer displays this message.

127951 - Appointment Expert (preview mode) display issue
Module: Scheduler ~ Appointment Expert window

Problem: When you open the Appointment Expert window (in preview mode) and select an appointment time block associated to a chair belonging to a book you cannot access, axiUm displays the message, "User does not have access to any books with this chair in it." This is fine. However, when you click the OK button to close this message, the Appointment Expert window (in preview mode) flickers.

Solution: Fixed so that in the above scenario, this window no longer flickers.

128018 - History record not showing modified time
Module: Scheduler - Chair tab

Problem: When you change an appointment from one chair to another, the history record shows the same date as previously displayed. It should show to modified date.

Solution: Fixed to show the modified date.

128143 - Discipline is excluded in subsequent searches
Module: Scheduler ~ Appointment Expert window

Problem: If you go to the Patient Appointments window or the Family Appointments window (in Scheduler module - (Rolodex) - Rolodex (Select Patient) window - select a patient record), and select multiple planned appointment records (each with different disciplines), and you search
for appointment time using the Appointment Expert window, axiUm applies the discipline when searching for the first planned appointment but excludes the discipline when searching for the remaining planned appointments. Because the search is not considering the discipline in the search process, the search results offer unsuitable times (e.g. violates ideal day times).

**Solution:** Fixed so that axiUm considers all disciplines when you run a search for multiple planned appointments containing different disciplines.

---

128218 - Searching for matching discipline does not work

**Module:** Scheduler ~ Appointment Expert window

**Problem:** In some cases, selecting the Only List Matching Disciplines checkbox and searching for multiple appointment blocks displays no search results, although available time exists for the selected discipline.

**Solution:** Fixed.

---

128220 - Unnecessary message (2)

**Module:** Scheduler ~ Appointment Expert window

**Problem:** Sometimes, when you search for a preferred discipline in the Appointment Expert window and you double-click on a search result, axiUm displays the Enforced Ideal Day Preference Warning window although you searched specifically for the preferred discipline.

**Solution:** Fixed. Now in the above scenario, axiUm no longer displays the Enforced Ideal Day Preferences window.

---

128656 - Unavailable chairs not displaying correctly

**Module:** Scheduler - Active tab

**Problem:** This affects version 5.10 only. If you make a chair unavailable, axiUm continues to display the column in beige, making the chair appear available. It should display gray.

**Setup:**

1. Create a book with the following setup:
   - **Book by chair**
     In the Books window, the **Book for selected** drop-down field displays the Chairs options.
   - **Book has no reservations**
     In the Books window, the **Book has reservations** checkbox is deselected.
2. Set up the Scheduler module to display in Book mode.
   In the Scheduler Options window’s Scheduler Type section, the Book option is selected.

   Then when you go to the Chair tab and make the chair unavailable (by right-clicking and selecting the Make Unavailable option), the associated column in the Active tab remains beige.

   **Solution:** Fixed so that in the above scenario, axiUm displays the column in gray.

---

### 129082 - Duplicate records

**Module:** Scheduler ~ Family Appointments window

**Problem:** This problem occurs if the Scheduler module is set up to display appointments in family mode (in Scheduler module - (Options/Settings) - Scheduler Options window - Patient/Family Appointments Window section, the Mode drop-down field displays the Family option).

Then when you create an appointment for two family members plus an appointment request for another family member, and you open the Family Appointments window (by going to Scheduler module - (Rolodex) - Rolodex (Select Patient) window - double-click a patient name) and click the Select All button, axiUm displays duplicate appointment records and appointment request records.

**Note:** This is a display issue only, and the appointments are not double-booked.
Solution: Fixed so that in the above scenario, axiUm displays one of each record.

129193 - Searching in Rolodex (Select Patient) window causes crash

Module: Scheduler ~ Rolodex (Select Patient) window

Problem: If you open the Rolodex (Select Patient) window (by going to Scheduler module - Rolodex)) and you run a search on a specific chart number, axiUm crashes or closes the Rolodex (Select Patient) window.

Solution: Fixed so that in the above scenario, axiUm no longer crashes or closes the Rolodex (Select Patient) window.

Transactions

121528 - Insurance information not retained

Module: Transactions - Treatment tab

Problem: When a claim is highlighted, the insurance list view displays the details the current policy details when it should display the details as they were at the time of entry.

Solution: Fixed.

122486 - Reprint/print copy of claim prints treatments out of order

Module: Transactions ~ claim form windows

Problem: When you print a claim form, axiUm lists the procedures in different order depending on whether you printed immediately or held printing. When you reprint a claim or print a copy, axiUm prints it in the same order as the “print held” version.

Solution: Fixed so that procedure codes print in the same order regardless of when or how the claim was printed.

123747 - Incorrect unapproved amount when not using BillAtStart

Module: Transactions - Payment tab

Problem: This problem occurs if you have the following setup:

- In Maintenance module - Office tab - Practice icon - Practices window - (Practice Options) - Practice Options window - Transactions Options section, the Bill total amount at start of In Process drop-down field displays the Yes option or the Yes (but can’t submit) option.
• In Maintenance module - System tab - System Options icon - System Options window - System Options section, the Bill pt portion of In Process procedure amounts checkbox is selected.

This causes axiUUm to calculate the Unapproved amount incorrectly by charging the treatment twice -- once when you added the treatment as an In Process status, and again when you changed the status to Completed.

**Solution:** Fixed.

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**124729 - Problems billing NY Medicaid**

**Module:** Transactions - Treatment tab  
**Problem:** If the policy fee (indicated in the Patient Info window - Insurance tab - Plan section - Fee Sch field) is different from the insurance company fee (indicated in the Maintenance module - Insurance tab - Insurance Companies icon - Insurance Companies List window - (Edit Record) - Default Fee field), adding a new treatment in the Transactions module's Treatment tab bills the claim using the insurance company fee. axiUUm should bill the claim using the policy fee.  
**Solution:** Fixed so that axiUUm bill the claim using the policy fee.

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**125279 - Re-billing order is different**

**Module:** Transactions  
**Problem:** When a patient has multiple policies, and one of the policies had no employer record, axiUUm does not re-bill them in the order they were originally billed. Policies with no employer record are appearing at the top of the list.  
**Solution:** Policies not tied to an employer will rank as a secondary employer and bill order will follow axiUUm rules.

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**126118 - Transactions display behavior**

**Module:** Transactions  
**Problem:** Sometimes, when you maximize and minimize the Transactions window, or if you change the resolution of your screen, axiUUm does not re-align the screen elements.  
**Solution:** Fixed so that in the above scenario, axiUUm adjusts the screen elements.

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**127221 - Cannot auto-allocate pre-payments**

**Module:** Transactions - Payments tab
Problem: If you go to the Transactions window - Payment tab - Allocate button - Applying Payment window - Pre-pay button - Pre-payment Allocation window, and you create a pre-payment record (with the Practice drop-down field left blank), and back in the Applying Payment window you click the Auto Apply button, axiUm does not auto-allocate the pre-payment amount.

Solution: Fixed by allowing you to auto-apply pre-payments with no practice specified.

127883 - Expand description on ADA 2006 claim form

Module: Transactions ~ claim form windows

Problem: ADA claim forms are not printing the last few characters of the procedure description if the description is over 27 characters long.

Solution: Fixed ADA 2002 and ADA2006 claim forms to print the full 30 characters of the description.

127903 - Unsupported file type is displayed for selection

Module: Transactions ~ claim form windows

Problem: When you submit a 4010 claim form, the associated claim form window lets you select the attachment type File Transfer. This option is not supported for 4010 EDI claims.

Solution: Fixed so that in the above scenario, this option is unavailable for 4010 EDI claims.

128284 - Statement report excludes insurance payment allocations

Module: Transactions ~ Statement report

Problem: If you allocated an insurance payment to a treatment that is assigned to a payment plan, and you use custom statement reports that include insurance payment allocations, axiUm omits this record from the report.

Solution: Fixed. Now in the above scenario, all insurance payments display on the custom Statement report.

128301 - Inactive status colors not showing for submitted planned txs

Module: Transactions - Treatment tab

Problem: In the Planned tab’s list view, planned treatment records with an Inactive treatment status does not display in the color defined for that status.

If the planned treatment is:

- Unsubmitted or is unbilled to insurance, the planned treatment is displayed in the associated status color.
- Submitted to insurance (for preauthorization), the planned treatment is displayed in black text.
5.11 Bug Fixes

Solution: Fixed.

128657 - Incorrect “held for” payment plan amounts
Module: Transactions

Problem: When adding a payment, if the payor is not responsible for the patient's payment plan, but chooses to allocate this payment to the payment plan (answers Yes to the prompt "This patient is on a payment plan. Would you like to apply the payment to the payment plan"), the Held For combo is not correctly indicating that the payment is held for the payment plan.

Solution: Fixed.

128755 - Duplicate patient payment records
Module: Transactions - General tab

Problem: This problem occurs when all of the following conditions are met:

- You are using version 5.10.
- You allocated multiple patient payments on the same day (one correct allocation and one with $0).
- You set up the Transactions module to display records in date ledger format (the Transactions Options window's Display Options section has the Date Ledger option selected).

Then when you view the Transactions window's General tab, axiUm displays the patient payment record twice. This is a display issue only, and all calculations are correct.

Solution: Fixed so that in the above scenario, axiUm displays the record once.

128872 - Problem with the PTBALEXT Package
Module: Transactions

Problem: There is a problem with the PTBAL EXT package when using OPEN ITEM. The over 365 buckets are not updated properly.

Solution: Fixed.
axiUm Release 5.11.02

EDI Claims

129531 - Blank fields in 5010 segments are written into the EDI file
Module: EDI Claims ~ EDI Claims window
Problem: If 5010 segments contain blank fields, and these blank fields are included in the EDI file, Emdeon rejects the claim.
Solution: Fixed so that if 5010 segments contain blank fields, axiUm omits these fields from the EDI file.

130005 - Erroneous records are returned
Module: EDI Claims - Remittance Responses tab
Problem: When processing 835 remittance responses, the insurance lookup was failing in some cases.
Solution: Fixed.

EHR

129847 - Current medication records are listed in different order
Module: EHR - Medications tab
Problem: If you add multiple medication records on the same day and these records have the same end date, axiUm displays these records in a different order in the Medications tab than in the Alerts tab's Current Medications section.
Solution: Fixed so that in the above scenario, axiUm lists the medication records in the same order. axiUm sorts these records based on the following order:

- end date
- entry date
- entry order

129990 - Display problem on warning window
Module: EHR ~ Services Not Covered Warning window
**Problem:** When you go to the Power Admin module and in the Services Not Covered Warning window you disable both the Yes button and the No button, the associated window in axiUm is displayed off the screen. If you try moving this window, it stretches (rather than moving) and as a result it distorts the window.

**Solution:** Fixed so that in the above scenario, the window displays normally.

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**Evaluations**

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**130060 - Column cut off in evaluation form**

**Module:** Evaluations ~ Add/Edit Evaluations window

**Problem:** This problem occurs when you open the Add/Edit Evaluations window through the Patient Approvals window. If the grade form displays multiple questions (enough to fill the list view), axiUm displays a vertical scroll bar. This is fine. However, the Grade column beside the vertical scroll bar is now cut off and you must use the horizontal scroll bar to enter the answer.

**Solution:** Fixed so that in the above scenario, axiUm fully displays the Grade column so you can enter the answers.
Info Manager

129705 - Closing the Info Manager module crashes axiUm

Module: Info Manager

Problem: This problem may occur if your workstation is running on Windows 7. If you run an Info Manager report (containing report criteria selected from the Options/Data section), and then you close the Info Manager module, axiUm crashes.

Solution: Fixed so that in the above scenario, axiUm no longer crashes.

129963 - Unable to delete obsolete columns

Module: Info Manager ~ Patient List report

Problem: When you run a predefined Patient List report (by going to the Info Manager module - Patients tab - Patient List category - Pre-defined button - Select Report window - highlight item in list view - Edit button), and the selected report contains fields that axiUm is unable to identify (i.e. fields such as the Pt.LastVisit field that are obsolete or invalid due to version changes), axiUm displays a message indicating this problem, but you are unable to remove these columns.

Solution: Fixed so that in the above scenario, you can remove these obsolete columns.

130029 - Missing Charges report causes crash

Module: Info Manager ~ Missing Charges report

Problem: When you run the Missing Charges report (by going to Info Manager module - Practice tab - Missing Charges category - Missing Charges window), and it contains more than 100 selected clinics, axiUm crashes.

Solution: Fixed so that in the above scenario, axiUm no longer crashes.

Kiosk

129414 - Wording change in message box

Module: Kiosk (previously called the axiUm Patient Sign-In application)

Problem: Need to rename the window title from axiUm Kiosk Settings to axiUm Kiosk Config.

Solution: Renamed the window title to axiUm Kiosk Config.
129539 - The executable file looks for old file *.ini file names

**Module:** Kiosk (previously called the axiUm Patient Sign-In application)

**Problem:** When we renamed the Kiosk configuration program from KioskSetup.exe to KioskConfig.exe, we also renamed the .ini files used by the Kiosk (axium.ini became KioskConfig.ini and axiumdb.ini became KioskConfigDb.ini). However, when you run Kiosk.exe, it still looks for the old file names, and because they no longer exist, axiUm displays instructions to run the Kiosk Config program instead of launching the Kiosk application.

**Solution:** The Kiosk has been changed to look for the correct *.ini file names.

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**Maintenance**

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129527 - Column shows illegible data

**Module:** Maintenance ~ Instrument Kits List window

**Problem:** In the Instrument Kits List window (in Maintenance module - Dispensary tab - Kits icon), if you create a new kit record and add a note to it, axiUm displays illegible data in the Note column.
Solution: Fixed so that in the above scenario, axiUm displays the text properly in the Note column.

130070 - Cannot change user’s preferred name

Module: Maintenance ~ Users window

Problem: In the Users window - Personal tab - Account section, if you change the value in the Preferred field and click the Save button, axiUm reverts to the original entry.

Solution: Fixed so that in the above scenario, axiUm retains the new entry.

Patient Attachments

129486 - Blank consent forms are treated as complete consent forms

Module: Patient Attachments
**Problem:** In some cases, axiUm fails to add a consent form, resulting in an empty consent record. In such cases, axiUm incorrectly detects these records as valid consents and stops displaying the “Consent Required” indicator on the status bar.

**Solution:** Fixed so that in the above scenario, axiUm will no longer consider these empty consents as valid and will continue displaying the “Consent Required” status bar indicator.

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**Patient Card**

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**130079 - Wait List column is blank**

**Module:** Patient Card

**Problem:** When you select a patient record that contains an appointment on the wait list, the Patient Card window’s Wait List column displays blank for this appointment, indicating they are not on a wait list.

**Solution:** Fixed so that if the selected patient is on a wait list, the Patient Card window’s Wait List column displays Yes.

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**Power Admin**

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**129690 - Opening window causes error message**

**Module:** Power Admin

**Problem:** When you try opening the Patient Deductible with Family Max. Warning window, axiUm displays an error message.

**Steps to replicate:**

1. Open the Find Dialog window.
   
   Right-click anywhere in the left panel to display a list of options and select the Find Dialog option.
5.11 Bug Fixes

2. **In the Criteria field, enter** Patient Deductible with Family Max.
   Warning.

3. **Click the Search button.**
   axiUm displays the search result in the list view.

   ![Find Dialog](image)

4. **Click the Go To button.**
   axiUm displays the ObjectWindows Exception window.

   ![ObjectWindows Exception](image)

   **Solution:** Fixed so that in the above scenario, displays the Patient Deductible with Family Max.
   Warning window and no longer crashes.

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**Rolodex**

**130016 - Blank consent forms are treated as complete consent forms**

**Module:** Rolodex

**Problem:** In some cases, axiUm fails to add a patient consent form, resulting in an empty consent record. In such cases, axiUm incorrectly detects these records as valid consents and fails to activate the chart lock. This means axiUm will let you access patient charts when you should be disallowed from doing so.
**Solution:** Fixed so that in the above scenario, axiUm will no longer consider these empty consents as valid and will activate the chart lock as if no consent form exists.

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### 130066 - Searching on Contact Phone takes a long time

**Module:** Rolodex

**Problem:** If you set up the Rolodex module to search on patient records based on their contact phone number (in the Rolodex Options window - Rolodex Section, the Optional Display Field (1-10) displays the Contact Phone option), and you run a search (on either contact phone numbers or all phone numbers), axiUm takes a long time to return search results.

**Solution:** Fixed by improving the speed of the search process.

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### 130096 - Using custom field displays Database Warning window

**Module:** Rolodex ~ Guarantor Rolodex window.

**Problem:** If you select one of the Pt.Custom Date fields as an Optional Display Column in the Rolodex settings, searching for a guarantor record in the Guarantor Rolodex displays the Database Warning window.

**Setup:**

1. Open the Patient Options window.
   
   Go to Rolodex window - ![Options/Settings]

   ![Patient Options window]

2. Go to the Rolodex section, and in the fields Optional Display Column (1-3) drop-down fields, select a custom patient field. For our example, we will go to the Optional Display Column 1 drop-down field and select the Pt. Custom Date 1 option.

3. Click the OK button.
   
   axiUm saves the changes, closes the Patient Options window, and returns to the Rolodex window.

**Steps to replicate:**

1. Open the Patient Info window.
Go to Rolodex window - patient selection list - highlight a record - (Edit Patient).

2. Click the Guarantor tab.

3. Click (Clear Data).
   axiUm clears the user-entry fields.

4. Go to the Guarantor Information section and click on the Title field (ellipsis).
   axiUm displays the Guarantor Rolodex window.

   ![Guarantor Rolodex Window]

5. Run a search.
   axiUm displays the Database Warning window.

   ![Database Warning Window]

Solution: Fixed so that in the above scenario, axiUm no longer displays the Database Warning window.

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**Transactions**

**129716 - Submitting EDI claim causes SQL error**

**Module:** Transactions

**Problem:** If you submit an EDI claim for a treatment, and the insurance company uses an alternate procedure code for that treatment, axiUm displays an SQL error.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays an SQL error.
129966 - Cannot re-bill multiple treatments

Module: Transactions ~ Applying Ins. Payment window

Problem: In the Applying Ins. Payment window, if you go to the list view and select multiple records and then right-click to display a list of options, the Rebill Treatments option is disabled. It should be enabled.

Solution: Fixed so that in the above scenario, the Rebill Treatments right-click option is enabled.
axiUm Release 5.11.03

EDI Claims

131123 - Invalid default qualifier for secondary IDs

Module: EDI Claims

Problem: In 4010 EDI claims, if the rendering provider has a blank billing number (in Maintenance window - Insurance tab - Insurance Companies - (Edit Record) - Insurance Company - Billing Numbers button - Billing Number window, the Billing No field is blank), axiUm sends 1E as the default qualifier. This causes medical claims to be rejected because it is an invalid qualifier for 4010 format.

Solution: Now, for 4010 medical and institutional EDI Claims, if there is no billing number, axiUm sends G2 (Provider commercial number) instead of 1E.

EHR

129980 - Auto-checkout causes incorrect insurance calculation

Module: EHR

Problem: This problem occurs when all of the following conditions are met:

- Treatments are added by providers who do not require approval.
- The patient has multiple insurance policies.
- The treatment date is in the past.

When this occurs, axiUm's auto-checkout omits calculating the secondary insurance split. To correct this, you must re-bill the claim in the Transactions module.

Solution: Fixed so that in the above scenario, axiUm calculate correctly.

130324 - Medications tab not obeying Power Admin settings

Module: EHR - Medications tab

Problem: When you go to the Power Admin module and disable either the Medications option or the Prescriptions option displayed in the EHR window's Medications tab, the EHR module does not obey these settings.
For example: You have Power Admin set up to hide the EHR window's Medications tab's Prescriptions option (so only the Medications option is shown), but you have axiUm set up to select the Prescriptions option by default. When you go to the EHR window's Medications tab, only the Medications option is available to select (the Prescriptions option is hidden), but axiUm contradicts this by displaying prescription records in the list view. If there is a conflict between Power Admin and axiUm settings, the Power Admin setting must take precedence. Continuing this process, if you add a medication record, axiUm displays this medication record in the current list view (i.e. the prescription list view), and it should be displayed in the medications list view.

**Solution:** Fixed so that the Medications tab obeys Power Admin settings and any conflicts such as the example above are resolved.

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**130330 - Medical Alerts table value not being maintained**

**Module:** EHR - Alerts tab

**Problem:** If you go to the Medical Alert Codes window (in Maintenance window – EHR tab – Medical Alerts icon), and you update a record (by accidentally clicking ![Add a new Record] first and then correctly clicking ![Modify Record]), the ALERTD2.Auto value is not maintained. This causes the medical alert code modified in this way to no longer display in patient records.

**Solution:** Fixed.

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**130422 - Refresh issue**

**Module:** EHR ~ Tooth Notes/Conditions window

**Problem:** If you are a provider who requires approval for conditions, and you open the Tooth Notes/Conditions window (in EHR window - odontogram - right-click - Tooth Notes/Conditions option), and then you add a condition to a patient record, axiUm displays the record in blue text (indicating that approval is required), and this is fine. However, the approval indicator on the status bar remains gray. This is a refresh issue. If you select a different patient and re-select the original patient, the indicator turns blue.

Note: Entering a condition through the EHR window’s Chart Add tab works fine.

**Solution:** Fixed the refresh issue. Now in the above scenario, the indicator turns blue immediately.

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**130588 - Medication windows contain prescription heading**

**Module:** EHR ~ Patient Medication Entry window,

**Problem:** In the following windows, axiUm displays a section called Patient Prescription:

- Patient Medication Entry window

  Go to EHR window - Medications tab - ![Create a new Record] - Existing Medication option.
• Edit Patient Medication widow

Go to EHR window - Medications tab - Medications option - double-click a record in the list view.

Because these are medication-type windows, the Patient Prescription section should be renamed to the Patient Medication section.

Solution: Changed the section name to Patient Medication in both windows.

131335 - Strange display of toolbar popup menu

Module: EHR - Medications tab

Problem: When you log onto axiUm as a user with no access to the eRx module, you can still access it.

Steps to replicate:
1. Log on to axiUm.

   Make sure you are a user who has no access to the eRx module (In the Users window - Clinical tab - Can Prescribe section, the Can Use eRx checkbox is deselected).

2. Go to EHR window - Medications tab.

3. Click (left arrow) to undock the menu.

4. Click (Create a new Record). Menu contains two items: New Prescription and Existing Medication.

5. Click (right arrow) to undock the menu.

6. Hover on the (right arrow) to pop up the toolbar.

7. Click (Create a new Record).

   The following options are displayed:
   
   - New Prescription
   - Existing Medication
   - axiUm eRx
   - axiUm eRx Instructor Signin
8. Click axiUm eRx.
   axiUm launches the eRx module.

This gives you access to the eRx module although you have no access rights for it.

**Solution:** Fixed so that in the above scenario, only the New Prescription option and the Existing Medication option are displayed.

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**Evaluations**

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**126433 - Data missing in periodic evaluations**

**Module:** Evaluations - Periodic Evals tab

**Problem:** When two instructors approve the same treatment, axiUm fails to increase the number of contacts of both instructors. This prevents the ability for both instructors to grade the same treatment.

For example: If InstructorA approves an in-process treatment (but does not evaluate), then InstructorB approves the same treatment while retaining the in-process status, axiUm deletes the treatment record approved by InstructorA (i.e. axiUm transfers the record from InstructorA to InstructorB). Because InstructorA can no longer access these unevaluated treatment records, they cannot grade them. Need axiUm to retain the record for InstructorA (i.e. axiUm copies the record from InstructorA to InstructorB).

**Solution:** Fixed.

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**130908 - Blank date fields display no search results**

**Module:** Evaluations - Periodic Evals tab

**Problem:** If you enter blank value in the Date From field and/or the Date To field, and you click the Search button, axiUm displays no search results. This is because blank date values are considered invalid.

**Solution:** Fixed so that axiUm considers blank date fields as open-ended values.
131950 - List view sorts incorrectly

**Module:** EHR - Tx History tab

**Problem:** Clicking on the Diagnosis column heading sorts the list view by diagnosis code. Because the Diagnosis column displays diagnosis descriptions, sorting by diagnosis code causes the list view to appear to sort incorrectly.

**Solution:** Fixed. Clicking on the Diagnosis column heading now sorts the list view by diagnosis description.

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**General**

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130523 - Strange behavior of Appointment Start Check window

**Module:** Start Check

**Problem:** When you open the Appointment Start Check window (by selecting the red start-check indicator on the status bar) and you and click (left arrow), the Description column displays P*.

**Solution:** Fixed so that in the above scenario, axiUm displays the procedure code description.

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130556 - Update scripts are incorrectly setting the insurance amount

**Module:** General

**Problem:** When updating axiUm to version 5.10, the update scripts set the insurance paid amount incorrectly for Type 74 records, affecting some custom reports.

**Solution:** Fixed.

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131208 - Cannot run axiUm with read-only access to axium.ini

**Module:** Login
Problem: If you have no write access to the axiUm.ini file and you try running the application, axiUm displays the message, “Unable to create INI file. Please contact your system administrator,” and axiUm fails to start.

Solution: You no longer require write access to the axium.ini file to run axiUm.

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**Info Manager**

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**130696 - Report displaying duplicate records**

**Module:** Info Manager ~ Clinical Charts report

**Problem:** If you select a new patient and add two treatments for today, and then you run the Clinical Chart report with the following criteria:

- In the Report Definition window:
  - The Selected list view displays only the Patient.Pt First field, the Patient.Pt Last field, the Treatment (Chart).TxChart Treatment Date field.
  - The Distinct Rows checkbox is selected.

- In the Column Conditions window, set the Treatment (Chart).TxChart Treatment Date criteria to today’s date.

Then when you run the report, axiUm displays two records for today’s visit.

**Solution:** Fixed so that in the above scenario, axiUm displays only one record.

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**Lab Tracking**

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**130602 - Deleting records retain original value**

**Module:** Lab Tracking ~ Lab Order Costs window

**Problem:** In the Lab Costs window, if you enter a record, modify it, and then delete it, the Total field retains the original value even though there are no records remaining (and therefore no costs remaining).
Solution: Fixed so that in the above scenario axiUUm calculates the correct total.

Also, if no records are highlighted in the list view, axiUUm disables 🗑️ (Modify Record) and 🗑️ (Delete Record).

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**Maintenance**

**131265 - Missing provider type description**

**Module:** Maintenance ~ Users List window

**Problem:** In the Users List window (in Maintenance window - Office tab - Users icon), clicking on the Provider Type drop-down field displays a list of provider type codes but no longer shows the associated descriptions.
Solution: Fixed so that the description displays again.

**Messenger**

**130309 - Auto-search not working in CC & BCC fields**

**Module:** Messenger ~ New Message window

**Problem:** In the New Message window (Messenger window - 📩 (New Message)), if you click on the To field, enter a partial name, and then press the Tab key, axiUm displays a drop-down field of all names beginning with that value. Then you can press the up/down arrow keys to navigate this list, and press the Enter key to select the highlighted item. However, this only works for the To field. If you do this in the CC field or BCC field; the up/down arrow keys disallows you from navigating the drop-down options.

**Solution:** Fixed so that in the above scenario, you can auto-search and select from the CC and BCC fields.
Patient Attachment

130707 - Cancelling an action requires too many mouse clicks
Module: Patient Attachment ~ Enter Parameter Values window
Problem: If you want to cancel the Enter Parameter Values window, you must click the Cancel button on (up to) seven windows to return to the Add Patient Consent window.
Solution: Fixed so that if no parameters are required, clicking the Cancel button returns you to the Add Patient Consent window. If parameters are required, clicking the Cancel button displays a message indicating that the request was cancelled, and then returns to the Add Patient Consent window. This fix reduces the number of clicks by four or more.

Personal Planner

126283 - Search speed is slow
Module: Personal Planner - Assigned Forms tab
Problem: When you select the Include User's Previous Assignments checkbox and run a search, axiUm takes a long time to process.
Solution: Fixed by improving the search speed.

130975 - Setting default tab causes crash
Module: Personal Planner
Problem: In some cases, if you set up a default tab (in Maintenance window - System tab - Custom Reports icon - Custom Reports window - ⚠️ (Level Access) - Report Access window, the Is Default checkbox is selected) and you open the Personal Planner module, either axiUm fails to open the report or the application crashes.
Solution: Fixed so that in the above scenario, axiUm displays the default report (i.e. tab).

Power Admin

130099 - The Change Password window is not working
Module: Power Admin ~ Change Password window
Problem: If you go to the Change Password window (in Dialogs - OTHER - Change Password) and you make the fields and buttons read-only (i.e. yellow), the Change Password window in axiUm is still enabled. Note that this works fine if you access the window by going to the Tools menu and selecting the Change Password option.
Solution: Fixed so that in the above scenario, axiUm disables these fields.

130444 - Settings are not working
Module: Power Admin ~ Patient Appointments window, Family Appointments window
Problem: In the Patient Appointments window and the Family Appointments window (in Power Admin window - Dialogs - SCHEDULER - Patient Appointments or Family Appointments), you cannot set the security on the Schedule button or the Reschedule button.
Solution: Fixed so that you can set the security on these buttons.

Rolodex

130263 - Refresh issue when changing patient name
Module: Rolodex
Problem: When you change the name of a patient (displayed on the patient selection list), axiUm does not update their name. If you refresh the window by closing and re-opening the Rolodex window, axiUm displays the updated name.
Solution: Fixed refresh problem.

130310 - Refresh issue when updating provider assignment
Module: Rolodex
Problem: When you go to the patient selection list and highlight a patient name, and you assign a provider to this patient, axiUm does not update the provider assignment information in the patient information section (top pane). If you refresh the window by closing and re-opening the Rolodex window, axiUm displays the updated information.
Solution: Fixed refresh problem.

130536 - Window loses focus
Module: Rolodex ~ Electronic Chart Lock Warning window, Edit Notes window
Problem: If you go to the patient list, and hold the mouse button down long enough on a patient record (containing either a chart lock or a sticky note), when axiUm displays the Electronic Chart Lock Warning window or the Edit Notes window, this window loses focus (it is no longer the active window). Clicking on it does nothing, and you are unable to close the window.
Solution: Fixed so that in the above scenario, axiUm retains focus on these windows.
131125 - Added patient records are not audited properly

Module: Rolodex ~ Patient History window

Problem: When you created a patient record, axiUm does not audit this properly. In other words, the Patient History window (in Patient Info window - History button) axiUm fails to display the Added-type history record.

Solution: Fixed so that axiUm correctly audits the creation of patient records.

Also, axiUm now has a script to correct bad data, so that records that previously appeared to be missing now displays the user of the overnight package.

Scheduler

117358 - Deleted treatment records are shown

Module: Scheduler ~ Appointment Treatments window

Problem: When you add a planned treatment to an appointment record and then you delete the planned appointment, axiUm still shows the appointment record in the Appointment Treatments window.

Steps to replicate:

1. In the Scheduler module, book an appointment for a patient.
2. Right-click on the appointment block to display a list of options.
3. Select the Appointment Treatments option to display the Appointment Treatments window.
4. From the Planned Treatments list view, highlight a treatment record and click (right arrow) to move the record to the Appointed Treatments list view.
5. Click the Close button to close the Appointment Treatments window and return to the Scheduler window.
6. Go to the EHR window’s Tx History tab.
7. Delete the planned treatment you added to the appointment.
8. Return to the Appointment Treatments window. axiUm still shows the deleted treatment.

Solution: Now in the above scenario, the planned treatment record you delete from the EHR module’s Tx History tab is also deleted from the Scheduler module’s Appointment Treatments window.

130424 - Unavailable time blocks shown as available

Module: Scheduler - Active tab

Problem: If you are using the book method of scheduling and you make a time block unavailable, axiUm retains the beige background (indicating they are still available). This is a display issue and the column still behaves correctly as if the chair is unavailable.
Solution: Fixed so that in the above scenario, axiUm displays the columns in gray (indicating they are unavailable).

---

**130449 - Planned procedures disappear when window is re-opened**

**Module:** Scheduler ~ Appointment Treatments window

**Problem:** If you go to the Appointment Treatment window and add a procedure (by using the Planned Procedure field and clicking the ➔ (right arrow)), axiUm displays the planned procedure record in the list view, and this is fine. However, if you close and re-open the Appointment Treatments window, this record disappears from the list view.

**Solution:** Fixed so that in the above scenario, axiUm retains the planned procedure record in the Appointed Treatments list view.

---

**130554 - CreateDate not getting updated from T3 IVR**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When an appointment is booked, the APPOINT.CreateDate database field should be updated to the current date from the axiUm server. This was happening for appointments booked in axiUm but not for appointments booked via the T3 IVR. Instead, the creation date of the original planned appointment was being kept.

**Solution:** Now, when an appointment is booked from the T3 IVR (using the ScheduleAppointment function in the T3 IVR web interface) the APPOINT.CreateDate field is updated to the server date.

---

**130899 - Speed issues**

**Module:** Scheduler - Active tab

**Problem:** This problem occurs if all of the following conditions are met:

- You are using the book method of scheduling
  
  In Scheduler window - ➔ (Options/Settings) - Scheduler Options window - Scheduler Type section, the Book option is selected.

- The book has no reservations
  
  In Maintenance window - Scheduler tab - Book icon - Books window, the Book has reservations checkbox is deselected.

Then when you place the cursor on a time block, axiUm is slow to respond.

**Solution:** Fixed so that in the above scenario, axiUm runs faster.
130984 - Yellow hovering appointment blocks become hidden

**Module**: Scheduler - Active tab

**Problem**: If you used workstationA (wide screen or high resolution) to cancel an appointment and then you rescheduled this appointment (change to a yellow hovering appointment block), and then moved this appointment block to edge of the screen, axiUm remembers the XY co-ordinates of this screen's location. Then if you go to workstationB (regular screen or low resolution) and open the same Scheduler window's Active tab, axiUm displays the appointment block on the original XY co-ordinates, which no longer fits on the current screen. This makes the appointment block appear to be missing.

**Solution**: Fixed so that in the above scenario, for workstationB, axiUm displays the yellow hovering appointment block on the top left area of the Scheduler window.

---

**Transactions**

130377 - SQL function returns incorrect amounts

**Module**: Transactions

**Problem**: The PAYPLAN_BAL_PKG.PP_OPEN_BAL function (which retrieves the overall payment plan amount, then applies all payments and adjustments against this payment plan amount, and then returns the total amount) is excluding allocated payments (i.e. Type 73 records), causing the total amount to be incorrect.

**Solution**: Fixed to include Type 73 records.

---

130405 - The Tx Status drop-down field is blank

**Module**: Transactions - Treatment tab

**Problem**: When you select either an in-process or completed treatment record, and in the Tx Status drop-down field you:

- Clear the existing value:
  
  When you click the Modify button, axiUm enters the default value in the Tx Status drop-down field, if any exist (in Maintenance window - Basic tab - Status Codes - Status Codes window, the Default checkbox is selected).

  axiUm should enter the default value only when you create a new record, not when you edit an existing record. In this case, the Tx Status drop-down field should remain blank.

- Enter a value that makes this record inactive (in Maintenance window - Basic tab - Status Codes - Status Codes window, the Make Treatment Inactive checkbox is selected):
  
  When you click the Modify button, axiUm enters the default value in the Tx Status drop-down field, if any exist. If no default values exist, axiUm clears your entry.

  In this case, axiUm should retain the value you selected.
Solution: Fixed so that in the above scenarios:

- The Tx Status drop-down field remains blank.
- The Tx Status drop-down field retains the value you selected.

130752 - Problem closing payment plans
Module: Transactions - Pmt Plan tab

Problem: When you close a payment plan (by clicking the Delete/Close button), axiUm disassociates the allocation history records from their payment plan, causing an imbalanced A/R Reconciliation report.

Solution: Fixed so that in the above scenario the A/R Reconciliation report shows the correct balance.

130932 - Warning appears when it should not
Module: Transactions - Ins Pmt tab

Problem: When you add a duplicate insurance payment record, axiUm displays the Duplicate Insurance Payment Warning window that notifies you of an existing identical record, and this is fine.

However, the term *duplicate* is defined as having the same insurance company, date, code, and total. For example, if you add a similar insurance payment record but for a different bank, axiUm still displays this warning, and in this case axiUm should suppress it.

Solution: Now in the above scenario, axiUm no longer displays the Duplicate Insurance Payment window.

130976 - Multiple users cause incorrect A/R amount
Module: Transactions - Payments tab

Problem: This problem occurs if userA on workstationA created a patient payment record, then userB on workstationB begins reversing that patient payment (but does not click the OK button), and then userA allocates that patient payment. Then later on when userB completes the patient payment reversal (by clicking the OK button), the list view’s Applied column displays an incorrect amount. This causes incorrect A/R amounts.

Solution: Fixed so that in the above scenario, when userB clicks the OK button, axiUm displays a message to prevent them from completing this action.
axiUUm Release 5.11.04

Chart Tracker

131904 - User names containing apostrophes cause SQL error
Module: Chart Tracker ~ Chart Out window
Problem: If a user’s name contains an apostrophe (‘) (e.g. O’Neil), and you try checking out a chart for this user (with no submitted chart request), axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays the SQL error.

EDI Claims

131526 - Claim form does not default the billing number qualifier
Module: EDI Claims ~ EDI Claims window
Problem: In 5010 EDI claims, the Billing Provider qualifier is always populated with G2. This should populate with the value of the billing provider (as set up in the Billing Number window’s Billing No. drop-down field).
Solution: Fixed so that the acceptable values in this segment are G2 and LU. If it is one of these two values, axiUm now populates with the Billing Provider's qualifier; otherwise axiUm uses the qualifier G2.

EHR

131482 - Refresh issue
Module: EHR - Chart Add tab
Problem: If a provider logs into axiUUm and clicks the Details sub-tab in Chart Add, axiUUm defaults the Provider field to the provider's ID, and this is fine. Then if that provider enables Entry on Behalf of Provider for a different provider, the Provider field still displays the logged-in provider’s ID. You must close and re-open the EHR module for the Provider field to display the proxy provider’s ID. This is a refresh issue.
Solution: Fixed so that in the above scenario, axiUUm refreshes the Provider field immediately.
131551 - Scanned images are missing

**Module:** EHR - Forms tab

**Problem:** If an EPR form contains two attachment-type questions that are vertically spaced apart enough that both are not visible at once, and you perform the following steps:

1. Add an attachment to the question at the top of the form.
2. Scroll using the mouse or scroll bar so that the top question is not visible.
3. Add an attachment to the question at the bottom of form.
4. Scroll back up to the top of the form with the mouse wheel or scroll bar.

Then it appears as if the attachment was not added. No history of an added attachment is shown. Internally, the attachment is uploaded to the database but it is not linked to the question on the form. Recovery in this case may be problematic if the attachment is a scanned copy of a paper form that is later destroyed.

**Solution:** Fixed so that in the above scenario, the link between an attachment and a question is not lost when the question is scrolled out of view.

---

131638 - Display issue

**Module:** EHR - Tx History tab

**Problem:** If you go to the list view and move the horizontal scroll bar to the right and then click on a column heading, axiUm returns only the scroll bar and contents to their original position while retaining the column headings on the right. This results in mismatched columns and contents.

**Default display:**

![Default Display](image)

Then... after scrolling to the horizontal bar to the far right of the list view (notice the column heading and content matches):
Then...after clicking on a column heading (notice the column heading and contents are now mismatched):

The same problem exists in the Ortho Tx History window and the Perio Tx History window.

**Solution:** Fixed so that in the above scenario, axiUm retains the column heading with its associated content.

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**131786 - Problem with display of Medications/Prescriptions option**

**Module:** EHR - Medications tab

**Problem:** Depending on the default Medications/Prescriptions option set up on your workstation, opening a record clears the state of the Medications/Prescriptions option.
Steps to replicate:

1. Open the Station Options window.
   
   Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).

2. Go to EHR branch - Medications section - EHRMedMode item.

   ![Station Options window](image)

3. In the Current Value field, enter 0 (Medications).

4. Open the EHR window's Medications tab.
   
   The Medications option is selected by default, and this is fine.

   ![EHR window Medications tab](image)

5. Select the Prescriptions option.
axiUrn displays prescription records in the list view.

6. From the list view, double-click on a prescription record to open it and then close the window.

Problem: The Prescriptions option is cleared, and it should remain selected. Note that both options are cleared.

We will now reverse the default Medications/Prescriptions station option.

7. Open the Station Options window.

Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).

8. Go to EHR branch - Medications section - EHRMedMode item.
9. In the Current Value field, enter 1 (Prescriptions).

10. Open the EHR window’s Medications tab.

    The Prescriptions option is selected by default, and this is fine.

11. Select the Medications option.

    axiuUm display medication records in the list view.
12. From the list view, double-click on a prescription record to open it and then close the window.

Problem: The Medications option is cleared, and it should remain selected. Note that both options are cleared.

Solution: Fixed so that in the above scenario, the Medications/Prescriptions option remains selected.

131789 - List view sorts incorrectly

Module: EHR - Tx History tab

Problem: There are two problems:

Problem 1:
Clicking on any column heading (displayed after the Diagnosis column) fails to correctly sort the list view.

Problem 2:
Clicking on the Prov./User column heading sorts the list view by provider code. Because the Prov./User column displays provider names, sorting by provider code causes the list view to appear to sort incorrectly.

Solution: Fixed.

Solution 1:
Clicking on any column heading displayed after the Diagnosis column now sorts the list view correctly.

Solution 2:
Clicking on the Prov./User column heading now sorts the list view by provider name.

131884 - Refreshing causes blank field

Module: EHR - Tx History tab
**Problem:** When logged in as a user that has eRx enabled in axiUm but who is not registered in axiUm eRx, and you add an existing medication and click the Refresh eRx button, axiUm blanks the Entry User field and turns the line’s text blue as if it were unapproved.

**Solution:** Fixed so that in the above scenario, the Entry User field retains its value and the text remains black. Note that the refresh in this case will still fail until the user is registered in axiUm eRx.

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**131967 - Rx printing causes crash**

**Module:** EHR - Tx History tab

**Problem:** axiUm crashes when a prescription for drug whose Drug Description contains an apostrophe is added, printed, refilled, has interactions, etc.

**Setup:**

1. Open the Drug Doses window.
2. In the Dose field, enter a dosage. For our example, we will enter 500mg/10ml – injct’n.
3. Click (Add a new Record).
   - axiUm adds the new dosage record to the list view.
4. Click (close).
   axiUm closes the Drug Doses window and returns to the Drug Definition List window.

5. Click (close).
   axiUm closes the Drug Definition List window and returns to the Maintenance window.

Steps to replicate:

1. Open the EHR window’s Medications tab.

2. Click (Create a new Record) to display a list of options.

3. Select the New Prescription option.
   axiUm displays the Patient Prescription Entry window.

4. Enter the fields and options.
   Make sure that the Dosage drop-down field displays an apostrophe (‘). For our example we will enter 500mg/10ml - injct’n.
5. Click (Add a new Record). axiUm adds the record to the list view.

<table>
<thead>
<tr>
<th>Drug</th>
<th>Dose</th>
<th>Total</th>
<th>Refills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acyclovir (Zovirax)</td>
<td>500mg/10ml - injch</td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

6. Click Done.

axiUm displays a Database Warning window.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.

---

**Evaluations**

**131452 - Treatment-based questions are missing**

**Module:** Evaluations ~ Add/Edit Evaluation window
**Problem:** If you select a completed treatment record, change the provider on that treatment record from provider1 to provider2, and then add a treatment-based evaluation form for provider2, the treatment-based questions are missing from provider2’s evaluation form.

Note: Adding an evaluation form through the EHR module works fine.

**Solution:** Fixed so that in the above scenario, the evaluation form displays treatment-based questions for provider2.

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**General**

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**102050 - Failed launch displays no explanation**

**Module:** Error Messages

**Problem:** If the axiUm install path contains parenthesis, axiUm cannot run. However, if you try launching the application and it fails for this reason, it displays no error message explaining this.

**Solution:** Fixed so that in the above scenario, axiUm displays the message, “The current file path has parentheses which is not allowed. Cannot proceed!”

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**Maintenance**

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**131654 - Options are misaligned**

**Module:** Maintenance ~ Users window

**Problem:** When you go to the Users window (in Maintenance window - Office tab - Users icon - Users List window - run a search - (Edit Record)), click on the Provider tab, and go to the Provider ID’s section, the SIN option and the TIN option are misaligned with the corresponding text box.

**Solution:** Fixed so that the options are aligned with the corresponding text box.
131944 - Misleading checkbox name

**Module:** Maintenance ~ System Options window

**Problem:** The Support Citrix stations checkbox is misleading.

**Solution:** Renamed this checkbox to Use thin clients.

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Patient Card

131632 - Deleting patient retains their internet access account

**Module:** Patient Card

**Problem:** When you delete a patient record, their internet access account is retained.

**Solution:** Fixed so that deleting a patient record also deletes their internet access account.

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Power Admin

130601 - Lost the ability to copy user level

**Module:** Power Admin

**Problem:** When we added the ability to create roles (in version 5.10.00, enhancement 78348), we lost the ability to copy user levels. Need to restore the ability to copy user levels.

**Solution:** Fixed. Now the Levels window has a Copy button (new).
131907 - Incorrect ID and field ID pointing to checkbox

**Module:** Power Admin

**Problem:** If the Info Manager branch - Tables section - Patient item, shows the Pt. Resp. Id# field is as red, and you go to Info Manager window - Patient List Category, the Patient Type option in the list view is disabled.

**Solution:** Fixed to control the correct report field access, not the Patient Type checkbox.

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Scheduler

130510 - Creating appointment request submits chart request

**Module:** Scheduler

**Problem:** Creating an appointment request for a patient with a paper chart causes axiUm to submit a chart request. axiUm should generate a chart request only when you schedule an appointment.

**Solution:** Fixed so that when you create an appointment request, axiUm no longer submits a chart request.
132102 - appoint.rpt is missing appointments tied to treatment

Module: Scheduler

Problem: If a provider has two appointments (each with treatment records attached), for the same date and time, and in the same clinic and chair, the Print Appointment List report displays the attached treatments for only one of the appointments.

Solution: Fixed so that in the above scenario, axiUm displays the attached treatments for both appointments in the report.

Transactions

131484 - Blank fields in claim forms

Module: Transactions

Problem: This problem occurs when you have all of the following setup:

- In Maintenance window - System tab - System Options icon - System Options window - System Options section, the Medical Diagnosis Code Type displays the ICD-10 option.
- In Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - (Edit Record):
  - The Diag. code type drop-down field displays the ICD-9 option.
  - The **Claim form** drop-down field displays either a HCFA-type claim format or the ADA 2012 claim format.
- In Transactions window - Treatment tab - Medical button - Tx Medical Information window - Medical Info section, all four **Diagnosis Code (for Claim)** fields display a value.

Then when you submit the claim, the diagnosis codes indicated in the first, second, and third field of the Tx Medical Information window is displayed in Box 34a positions B, C, and D (A is blank).

The same problem occurs in the EDI file.

Solution: Fixed so that in the above scenario, all four diagnosis codes are displayed in the claim form.
axiUm Release 5.11.05

EHR

129703 - axiUm appears to hang

Module: EHR - Tx Plan tab

Problem: If you go to the Patient Acceptance tab, click the Accept/Print button, sign the acceptance, and in the Billing Options for Planned Treatment window you click the OK button, axiUm appears to hang when it is actually processing. Exiting axiUm by pressing ctrl+alt+delete, causes missing records in the database.

Solution: Fixed by:

- Showing a progress bar to the Save to Chart process
- Placed transaction processing around each treatment record to be saved in the saving process. This prevents records from corrupting in the event you exit during the saving process.

132464 - Window disregards approver’s Power Admin rights

Module: EHR ~ Provider Non-Treatment Warning window

Problem: The Provider Non-Treatment Warning window uses the logon user’s Power Admin rights rather than the approver’s. For example, if you have this window’s Yes button set to yellow for a student and green for an instructor, when the instructor swipes to approve the treatment, this button remains disabled.

Solution: Fixed so that the Provider Non-Treatment Warning window uses the approver’s Power Admin rights.

132809 - Cumulative evaluation from previous grades

Module: EHR

Problem: This problem occurs when using evaluation forms that have the Treatments are Cumulative checkbox selected and the students grade themselves. If you (a provider who requires sessional grading) change your treatment record from Planned status to In Process status, and receive approval, axiUm displays the associated sessional evaluation form. If you answer some questions, and change the treatment record to Completed status, the previous answers in the evaluation form are blank. You must then locate the previous version of the form by clicking the View Others button.

Solution: Fixed so that in the above scenario, axiUm retains the answers.
132731 - Missing character in IPORTAL_PKG.sql

Module: Database
Problem: The IPORTAL_PKG.sql is missing a forward slash ( / ). This may cause update scripts to fail.
Solution: Fixed to include the forward slash ( / ).

132852 - Problem with PAYPLAN_BAL_PKG.PP_OPEN_BAL

Module: Database
Problem: PAYPLAN_BAL_PKG.PP_OPEN_BAL not correctly handling type 74’s, causing miscalculations for insurance payments.
Solution: Fixed.

Info Manager

132184 - Overdue Extensions report causes SQL error

Module: Info Manager ~ Overdue Extensions report
Problem: If you select the Overdue Extensions report (in Info Manager window - Patients tab - Overdue Extensions category), and you add any Provider, Provider Type, or Patient Provider field, running the report displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.

132789 - Missing category

Module: Info Manager ~ Forms On File report
Problem: If you did not purchase the Inventory module, the Forms On File category (in Info Manager window - Clinic Mgt tab) is missing. This prevents you from running the Forms On File report.
Also, the Inventory Activity report is displayed and this is unnecessary. Without the Inventory module, there is no need to run the Inventory Activity report.
Solution: Fixed so that in the above scenario, the Forms On File category is available regardless whether you purchased the Inventory module.
Also in the above scenario, axiUm hides the Inventory Activity report.
Maintenance

132297 - Problems merging patient charts
Module: Maintenance ~ Chart Merge Utility window
Problem: If two patient records are merged and both patients have had an insurance payment allocation from the same bulk cheque, the separate Type 74 records for this insurance payment are not merged into one. This results in multiple Type 74 records for a given patient and insurance payment.
Solution: Fixed.

132735 - Drop-down field does not save your selection
Module: Maintenance ~ Inventory Product window
Problem: The Inventory Product window's Cost method drop-down field does not retain the option you selected.

Steps to replicate:
1. Open the Inventory Product window.
   Go to the Maintenance window - Inventory tab - Products icon - Inventory Products List window - 📋 (Edit Record).
2. Go to the Product Details section.
3. From the Cost method drop-down field, select the LIFO option or the Average option.
   Do not select the first option (i.e. FIFO).
4. Click the OK button to save the changes and close the Inventory Product window.
5. Re-open the Inventory Product window.
   The Cost method drop-down field displays the FIFO option.

Solution: Fixed so that in the above scenario, axiUm retains the option you selected.

132911 - Printing claims with EOBs prompts for printer twice
Module: Maintenance ~ Desktop Settings window
Problem: If you have the following setup: In Maintenance window - System tab - Desktop Settings icon - Desktop Settings window, the Always Selecting Printer for Printing checkbox is selected. Then if you print batches of claims (by going to Maintenance window - System tab - Processes icon - Processes window - Print Held button - Print Held Claims window), and axiUm detects an EOB as an attachment to the claim printing, axiUm asks you to select the printer again (once for the claim printing, and again for the EOB)
Solution: Fixed so that axiUm prints the EOB on the same printer you selected to print the claim. This way you are prompted only once.
Patient Attachments

132103 - Need the ability to troubleshoot empty consent files

Module: Patient Attachments
Problem: axiUm is creating empty consent files.
Solution: axiUm now has the following new station options to capture more logging information to help troubleshoot.

Setup:
1. Open the System Options window.
   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).
2. Go to General section - Office section.
3. The following items are new:
   - DBLogging
   - DBLocalLogPath
   - DBNetworkLogPath

The log files contain records for logon, logoff and DB errors (network disconnection).

Personal Planner

132381 - Closing the Edit Form Information window causes crash

Module: Personal Planner ~ Edit Form Information window
Problem: When you open the Edit Form Information window (in Personal Planner window – Assigned Forms tab – run search – highlight item from list view – right-click – Edit Form Information option) and then immediately click the OK button, axiUm crashes.
Solution: Fixed so that in the above scenario, axiUm no longer crashes.
132182 - The Eligibility button is missing

**Module:** Power Admin ~ Patient Insurance window

**Problem:** This affects US version only. When you open the Patient Insurance window (in Power Admin window - Dialogs - PATIENT AREA - Patient Insurance), the Eligibility button is missing.

**Solution:** The Eligibility button is now shown.
132461 - Template Notes not obeying Power Admin settings

**Module:** Power Admin

**Problem:** If your user level contains a role where the default rights are set to No Access (all red), and you go to the EHR module and open a template note, the answer fields are disabled.

**Solution:** Fixed so that in the above scenario, the answer fields are enabled.

---

132467 - Right-clicking on appointment block causes crash

**Module:** Scheduler - Active tab

**Problem:** If you right-click on a yellow “floating” appointment block to display a list of options, and during this time axiUm refreshes the screen, selecting an option (e.g. the Notes option) causes axiUm to crash.

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.

---

132489 - Display problem with clinic holidays

**Module:** Scheduler - Active tab
Problem: If you are viewing the Active tab on a date defined as a clinic holiday, axiUm displays incorrect number of columns and the columns display incorrect providers.

Solution: Fixed.

---

Transactions

131855 - Allocating prepayments causes incorrect total

Module: Transactions

Problem: When you allocate a patient pre-payment to a patient charge, the internal history records show the apply-to-payment amount before the unallocate-from-pre-pay amount, temporarily causing a greater payment total than the original amount before decreasing the amount to account for the allocation to the charge.

Note: This has no affect on payment history displays or A/R balances in axiUm. However, the A/R report detail line may appear confusing.

Solution: Fixed to show the decrease (i.e. unallocate-from-pre-pay amount) before the increase (i.e. apply-to-payment).

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132139 - Patient payment record is hidden when it should display

Module: Transactions - Payment tab

Problem: This problem occurs if the selected patient has a guarantor (and the patient is not their own guarantor). If you create a payment record where the patient paid, and you deselect the Include Guarantors' Payments for Other Patients checkbox, axiUm displays this payment record in the list view, and this is fine. However, if you select this checkbox, the payment record is omitted from the list view.

Solution: Fixed so that in the above scenario, the payment record displays in the list view.

---

132377 - Deleting payment plans causing problems

Module: Transactions - General tab

Problem: If you delete a payment plan where the Balance to Charge is the same as the Plan Total, axiUm updates the associated transactions incorrectly. You can see this discrepancy in the Transactions window’s General tab using the Date Ledger view mode (in Transactions window - (Options/Settings) - Transaction Options window - Display Options section, and in the General Tab view section the Date Ledger options is selected).

Solution: Fixed so that the correct amount is shown.

---

132815 - Insurance transfers to patient shows incorrectly

Module: Transactions ~ Statements report
**Problem:** When a payment plan ID reaches a certain number, any insurance amount that have been rejected and where an insurance adjustment transfer to patient was made, causes it to show incorrectly in the statement.

**Solution:** Fixed to show correctly on the statement.

---

**132905 - Clicking the Payment tab freezes axiUm**

**Module:** Transactions - Payment tab

**Problem:** If you select a patient and then click on the Transactions window’s Payment tab, axiUm freezes momentarily.

**Solution:** Fixed so that in the above scenario, axiUm no longer freezes.