Contents

**axiUm Release 5.11.00** ........................................................................................................... 1

**Dispensary** .......................................................................................................................... 1
51302 - Charges are visually associated to dispensary items ................................................. 1
63871 - Ability to scan a lost kit to dispensary count ............................................................. 2
71651 - Make Sterilization window focus in Kit field right after opening ......................... 5
72836 - Ability to override error messages ............................................................................ 5
73098 - Ability to omit out-of-service kit records from list view ...................................... 7
81816 - Requests tab now displays Order # column ............................................................ 8
82594 - Dispensary window can search on logon ID ............................................................ 10
82596 - Ability to define the cost of sundry items ................................................................. 11
84056 - Improved tracking of instrument life cycle ............................................................... 14
86274 - Ability to produce bulk dispensary statements ......................................................... 15
104249 - Changed field names ............................................................................................ 17

**EDI Claims** ......................................................................................................................... 21
126202 - Improved usability for list views ............................................................................ 21
126239 - Improved sorting speed ......................................................................................... 22
126241 - Ability to search on either treatment / claim date ................................................. 22
126243 - Improved ability to apply & update delay reason .................................................. 23
126596 - Date search based on country of practice ............................................................. 24
126626 - New right-click options in EDI Claims window .................................................... 25

**EHR** .................................................................................................................................... 25
119940 - Now deselects the Show Deleted checkbox by default ......................................... 25
124977 - Improved eRx troubleshooting ............................................................................. 25
125820 - Improved prescription entry on behalf of provider .............................................. 26
125821 - Removed unnecessary prescription fields .............................................................. 30
125822 - Ability for Patient Medication Entry window to remain open .............................. 31
125903 - Allow entry of value "PRN" for refills .................................................................... 32

**General** ................................................................................................................................ 33
124042 - Now supports multiple time zones ...................................................................... 33
124381 - New customized indicators on the status bar ....................................................... 34
125010 - Removed epoch times from axiUm database ....................................................... 37
127325 - Increase field in Log On window .......................................................................... 37

**Info Manager** .................................................................................................................... 38
103880 - New fields in the Claims report ............................................................................ 38

**Inventory** ........................................................................................................................... 40
127445 - Increased inventory bar code field ....................................................................... 40

**Maintenance** ...................................................................................................................... 41
67500 - Ortho billing to use treatment instructor ............................................................... 41
119967 - Ability to sort list views in most windows .............................................................. 41
119978 - Ability to define tooth-specific insurance coverage ........................................... 41
124932 - Consolidating sealants on NY Medicaid claims .................................................. 43
125702 - Now displays patient charge in various windows ................................................. 43
126192 - Improved speed of auto-batch ............................................................................. 44

**Patient Card** ....................................................................................................................... 44
123791 - Improved the Guarantor tab .................................................................................. 44

**Perfo Chart** ......................................................................................................................... 45
125083 - Disabling Perio still allows access through EHR .................................................... 45

**Rolodex** ................................................................................................................................ 48
124137 - New billing rule for rate-based NY Medicaid coverage ...................................... 48

**Scheduler** ........................................................................................................................... 49
38624 - Changed non-clinic times to clinic time exceptions .............................................. 49
121023 - More appointment display options ...................................................................... 52
axiUm Release 5.11.01
EHR
126673 - Improved eRx approval process .................................................. 82
128749 - Ability to display full diagnosis description .................................... 82
128848 - New eRx printer controls ............................................................... 83
Info Manager
124259 - New A/R Reconciliation by Department reports .............................. 85
Maintenance
127502 - Spreadsheets are now available in iForms .................................... 86
axiUm Release 5.11.02
EHR................................................................................................................. 88
129707 - Improved warning window ............................................................ 88
Patient Attachments
118464 - New station option to suppress the printing of consent forms .......... 89
axiUm Release 5.11.03
EDI Claims .................................................................................................... 91
131019 - Missing state license number causes EDI rejection .......................... 91
EHR.................................................................................................................. 91
128792 - Ability to define specific conditions on a consent form .................... 91
129508 - Ability to default Medications or Prescriptions option .................... 93
Maintenance................................................................................................. 94
130710 - Copying provider schedule can now copy same chairs .................... 94
130733 - Ability to multi-select tooth condition records & resolve them ......... 95
Patient Card
129736 - Access to Template Age-specific Coverage window ....................... 95
Transactions
130727 - Implemented new ADA 2012 claim form ...................................... 96
axiUm Release 5.11.04
Power Admin ................................................................................................. 97
130155 - New Form Page Details window ..................................................... 97
axiUm Release 5.11.05
Info Manager ................................................................................................ 99
132540 - Bank fields now available ............................................................... 99
Transactions .................................................................................................. 100
132509 - Claim forms now display billing doctor first ................................. 100
51302 - Charges are visually associated to dispensary items

Module: Dispensary - Lost Items tab

Issue: Currently, there is no visual relationship between the charges that providers incur (for lost or broken items) and the description of the dispensary items involved. If a provider questions a charge on their account, it is difficult to explain to them without this information. Need axiUm to show this information.

Enhancement: Now axiUm shows the following:

- In the Dispensary window's Lost Items tab, there is a Charge column heading (new). This column displays the cost associated to the record highlighted in the list view.

Also added the following new items in the Info Manager module:

- The Disp.Trx.Item Description field
Go to Info Manager module - Clinic Mgt tab - Dispensary A/R category - Edit Report right-click option - Report Definition window - Dispensary Trx file.

- The Dispensary Lost Charge file and the Dispensary Found Refund file
  Go to Info Manager module - Clinic Mgt tab - Dispensary Lost Items category - Edit Report right-click option - Report Definition window.

63871 - Ability to scan a lost kit to dispensary count

Module: Dispensary ~ Dispensary Count Lost Kit Warning window (new)

Issue: Currently, axiUm considers lost items as out-of-service, and therefore includes these lost items in the dispensary count process. Need the ability for axiUm to identify lost kits apart from out-of-service kits, and also give you the ability to scan a found kit into the dispensary count.

Enhancement: Now axiUm has the ability to identify lost kits from out-of-service kits, and gives you the ability to scan found kits.

Setup:

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

2. Go to Dispensary section - Dispensary branch - CountLostKitWarning item.
3. In the Current Value field, enter 1.

4. Click (Modify Record).

5. Click (close) to close the Station Options window and return to the Maintenance module.

6. Log out of axiUm and log back in.

Usage:

1. Open the Dispensary Count Processes window.
   Go to Maintenance module - Dispensary tab - Dispensary Count Processes icon.
2. Click the Append button.
   axiUm displays the Dispensary Count window.

3. In the Kit field, enter the barcode for a kit that has been marked as lost. For our example, we will enter 01ACBR0402.

4. Press ENTER.
   axiUm displays the Dispensary Count Lost Kit Warning window (new).

5. Click the Yes button.
   axiUm displays the Kit / Sundry Found window.
6. Click the OK button.
   axiUm displays the Check In Lost Kit Question window.

   ![Check In Lost Kit Question](image)

7. Click the Yes button.
   axiUm checks in the selected kit and includes the item in the dispensary count process.

---

**71651 - Make Sterilization window focus in Kit field right after opening**

**Module:** Dispensary ~ Sterilize Kits window, Transfer Kits window  
**Issue:** When axiUm displays the following windows, it does not default the cursor to any field:

- Sterilize Kits window  
  (Go to Dispensary module - Sterilize button)

- Transfer Kits window  
  (Go to Dispensary module - Transfer button)

Need axiUm to default the cursor to the Kit field.

**Enhancement:** Now when you open the above windows, axiUm defaults the cursor to the Kit field. This saves you from having to click in the Kit field before scanning each item.

---

**72836 - Ability to override error messages**

**Module:** Dispensary  
**Issue:** When you have reached your maximum number of hours checked out for a kit, the maximum allowable number of sundry items checked out for today, or have reached your maximum dispensary account balance (amount owing), axiUm displays an error message preventing you from taking further action until the problem is resolved. Need the ability to override these messages.

**Enhancement:** Changed the error messages to warning messages so that you can select to continue or not.

When you have reached your dispensary maximum checkout time (as defined in Users window - Provider tab - Locks section - Max Hrs Out field), axiUm displays the following message:

Current:
Enhancements

Modified: 30-Nov-12

New:

When you have reached the selected sundry’s allowable number of checked out items (as defined in the Sundry Code window’s Max Allowed field), axiUm displays the following message:

Current:

New:

When you have reached the allowable dispensary account balance (as defined in the Dispensary Setup window’s System Options section’s Lock Provider when balance > field), axiUm displays the following message:

Current:
New:

Note: You can change these windows from warning messages to error messages by going to the Power Admin module and disabling the Yes button to prevent users from accessing this button.

73098 - Ability to omit out-of-service kit records from list view

**Module:** Dispensary

**Issue:** Currently, axiUm includes out-of-service kits in the search process. Need the ability to exclude them from the search results.

**Enhancement:** Now has the ability to exclude out-of-service kits from search results. axiUm displays an Include Out of Service checkbox in the following windows:

- Maintenance - Dispensary tab - Kits icon - Instrument Kits List window
- Dispensary window - Kits In tab
Enhancements

Modified: 30-Nov-12

Dispensary window - Instruments tab

81816 - Requests tab now displays Order # column

Module: Dispensary

Issue: When you create a dispensary request and print the request, axiUm assigns an order number (e.g. 000830). But in the Dispensary window’s Request tab, axiUm shows a request number (e.g. Req ID 954). Need to display an Order Number column. This gives you the ability to search (or sort the columns) by order number and match it to the one on the printout the providers bring.

Enhancement: Now the Dispensary window’s Requests tab displays an Order # column (new). Clicking this column heading sorts the list.

In addition to the above enhancement, the Info Manager module’s Dispensary Request report contains four new fields:

1. Open the Report Definition window.
   Go to the Info Manager module Clinic Mgt tab - Dispensary Requests category - list view - right-click - Edit Report option.
The following fields are new:

- **DispReq Order #**: This field indicates the order number that axiUm assigned to the dispensary request printout.

- **DispReq Request Type**: This field indicates the type of dispensary request, and displays either Appt (i.e. automatic) or Manual on the Dispensary Request report.

- **DispReq Entry Date**: If the dispensary request was made manually, this field indicates the date it was submitted.

- **DispReq Entry Time (Entry Time)**: If the dispensary request was made manually, this field indicates the time it was submitted.

2. Click the OK button.
   axiUm saves the entries, closes the Report Definition window, and returns to the Info Manager module.

3. Click the Search button.
   axiUm generates the Dispensary Request report. The new column headings are displayed.
82594 - Dispensary window can search on logon ID

Module: Dispensary

Issue: Various windows in the Dispensary module (e.g., Check In window) can display either the User Login field or the Provider Code (as set up in the Dispensary Setup window). However, the Dispensary window's Provider field always displays the Provider field regardless of the setup.

Enhancement: There are two enhancements:

- If you go to the Dispensary Setup window's Workstation Options section, and from the Identify Provider By drop-down field you select the User Login option, the main Dispensary window's Provider Code field changes to the User Login field.

- Then if you click this User Login (ellipsis), axiUm displays the Users List (Providers Only) window. This window displays a Logon column (new), and clicking this column heading sorts the list view by logon ID.
**82596 - Ability to define the cost of sundry items**

**Module:** Dispensary  

**Issue:** Need the ability to indicate the cost of sundry items. This lets you charge providers the replacement cost of sundry items expected back but not returned.  

**Enhancement:** You can now define replacement costs of sundry items.

**Setup:**

1. Open the Sundry Code window.  
   Go to Maintenance module - Dispensary tab - Sundries icon - Sundry List window - (Edit Record) and select an item from the list and remember its barcode.

2. On the Sundry Code window, deselect the Disposable Item checkbox. axiUm changes the name of the **Cost** field to the **Cost __ (when not returned)** field (new).  
   Deselecting this checkbox lets you access the Kit / Sundry Not Returned window for recording sundry items not returned. You will see this window later in the Dispensary module when we follow the usage instructions.

3. In the **Cost __ (when not returned)** field (new), enter the replacement cost of the item. For our example, we will enter 1.00.

4. Click the OK button.  
   axiUm saves the changes, closes the Sundry Code window, and returns to the Sundry List window.
Next, we will create a chargeable billing code. For our example, we will create one called LOST, Lost Instrument.

5. Open the Billing Codes window.
   Go to Maintenance module - Dispensary tab - Billing Codes icon.

6. Click (Clear Data).
   axiUm clears the fields.

7. Enter the fields and options. For our example, we will enter the following:
   - Code: LOST
   - Description: Lost Instrument
   - Type: Debit (+)

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

9. Click (close).
   axiUm closes the Billing Codes window and returns to the Maintenance module.

Usage:

1. Go to the Dispensary module and click the Check-Out button.
   axiUm displays the Check Out window.

2. Enter the fields and options. For our example we will enter the following:
   - Provider Code: D1234
   - Dispensary Item: SMLL. This is the barcode of the sundry item defined in our setup.
3. Click the Check-Out button.
axiUm check outs the item, closes the Check Out window, and returns to the Dispensary window.

4. Go to the Dispensary Out tab and click the Search button.

5. From the list view, highlight the item you checked out and click the Lost button.
axiUm displays the Kit / Sundry Not Returned window. We enabled access to this window in the setup (see setup step 2). In previous versions, you can access this window only if the lost item was a kit (not a sundry).

6. From the Reason drop-down field, select the reason code we defined earlier. For our example, this is LOST, Lost Instrument.
axiUm defaults the Charge field to the replacement cost of the sundry item.

7. Click the OK button.
axiUm saves the entries, closes the Kit / Sundry Not Returned window, and returns to the Dispensary window.

8. Click the Lost Items tab.

9. Click the Search button.

The sundry item is listed as a lost item, and indicates the associated charge.
Click on the Provider Bal tab and click the Search button. The replacement cost has been charged to the associated provider.

---

**84056 - Improved tracking of instrument life cycle**

**Module:** Dispensary ~ Replace Kit Instrument window

**Issue:** Need axiUm to notify you during the sterilization process when an instrument within a kit has reached the end of its life cycle.

**Enhancement:** Now has the ability for axiUm to notify you during the sterilization process when an instrument within a kit has reached the end of its life cycle.

**Setup:**

1. Open the Dispensary Setup window.
   
   Go to Dispensary module – Setup button.

2. Go to the Workstation Options section.
   
   The **Review Kit contents during sterilizations** drop-down field (changed, this used to be a checkbox) displays the following options:

   - **Never (new):** Selecting this option indicates that axiUm does not automatically display the Replace Kit Instruments window. To display this window, you must manually select to open it.

   - **Always (new):** Selecting this option indicates that axiUm always displays the Replace Kit Instruments window.

   - **Only when exceeding life cycle (new):** Selecting this option indicates that axiUm displays the Replace Kit Instruments window only if an instrument in the kit has reached the end of its life cycle.

3. From the **Review Kit contents during sterilizations** drop-down field, select the **Only when exceeding life cycle** option.
4. Click the OK button.  
axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary module.

Usage:

When you sterilize a kit, and one of the instruments in the kit has reached the end of its life cycle (as defined in Maintenance module - Dispensary tab - Instruments icon - Instrument Codes window), axiUm automatically displays the Replace Kit Instrument window. This window now displays a Life Cycle column heading (new). This lets you compare its defined life cycle against the number of times used, giving you the opportunity to replace it while you have the kit open.

For example, if one of the instruments in the list view has both the Life Cycle column heading and the Times Used column heading displaying the same value, this instrument must be replaced.

86274 - Ability to produce bulk dispensary statements

Module: Dispensary ~ Provider Bal tab

Issue: Need the ability to print dispensary statements for multiple students. Currently, you must select each student and print their statement individually, and this can be time-consuming.

Enhancement: Now has the ability to select multiple students and send dispensary statements to them using the Messenger module.
Usage:

1. Go to the Dispensary window’s Provider Bal tab.

2. Run a search on all providers.

3. Highlight those providers who have balances owing on their account (i.e. the Provider Bal column displays an amount).

Note: You can now highlight multiple records.

4. Right-click to display a list of options.

5. Select the Send Statements to Providers right-click option (new).

Selecting this right-click option sends the dispensary balance statement to the Messenger module for each provider in the highlighted records.
axiUm displays a confirmation message indicating that a dispensary balance statement has been sent to the selected providers.

![Confirmation Message]

The next time these providers log onto axiUm, it automatically displays this Messenger message.

---

**104249 - Changed field names**

**Module**: Dispensary

**Issue**: Some windows display dollar value field names (e.g. the Amount field), and these names can be confusing (e.g. the Amount field for indicating cost of items can be misinterpreted as quantity of items). Need to change these field labels so they are more descriptive.

**Enhancement**: Changed the field names in the following windows:

- Instrument Codes window
  - In Maintenance module - Dispensary tab - Instruments icon.
  - Changed the name of the **Amount** field to the **Cost __ (for replacement)** field.

  **Current:**
Kit Type Codes window
In Maintenance module - Dispensary tab - Kit Type Codes icon.
Changed the name of the Amount field to the Cost ___ (for replacement) field.

Instrument Kits window
In the Maintenance module - Dispensary tab - Kits icon - Instrument Kits List window - (Create a new record).
Changed the name of the Cost field to the Cost/Value field.
Kit Items window

In the Maintenance module - Dispensary tab - Kits icon - Instrument Kits List window - (Create a new record) - Instrument Kits window - Details button.

Changed the name of the **Cost** field to the **Cost/Value** field.

**Current:**

![Current Kit Items window]

**New:**

![New Kit Items window]

**Kit / Sundry Not Returned window**
In the Dispensary module - Dispensary Out tab - Lost button
Changed the name of the **Total** field to the **Charge** field.

![Screenshot](image1)

**Current:**

**New:**

Kit / Sundry Found window
In Dispensary module - Lost Items tab - Found button
Changed the name of the **Value** field to the **Amount Charged** field.

![Screenshot](image2)

**Current:**

**New:**

Dispensary Billings window
In the Dispensary module - Billing button
Changed the name of the **Total** column to the **Amount** column.

![Screenshot](image3)

**Current:**
New:

EDI Claims

126202 - Improved usability for list views

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

**Issue:** Need the ability to clear all selected insurance company names, or to clear only those belonging to the same parent company, from the following windows:

- Include Insurance Companies window
  
  In EDI module - Include ins. field (ellipsis)

- Exclude Insurance Companies window
  
  In EDI module - EDI Claims window - Unsubmitted Procedures tab - Exclude ins. field (ellipsis)
**Enhancement:** Now in the above windows, there is a Clear Group button (new) and a Clear All button (new).

![Include Insurance Companies](image1)

**Clear Group** (new): Selecting this button clears the highlighted item from the Selected Insurance Companies list view, plus those items from the same parent company.

![Exclude Insurance Companies](image2)

**Clear All** (new): Selecting this button clears all items from the Selected Insurance Companies list view.

---

**126239 - Improved sorting speed**

**Module:** EDI Claims ~ EDI Claims window  
**Issue:** In the Unsubmitted Procedures tab and the Submitted Procedures tab, clicking a column heading sometimes takes a long time to sort the records in the list view.  
**Enhancement:** Improved the sorting speed.

---

**126241 - Ability to search on either treatment / claim date**

**Module:** EDI Claims ~ EDI Claims window  
**Issue:** Currently the **Date from** and **Date to** fields are search criteria fields for claim dates. However, the dates displayed on the records in the search results reflect treatment dates. This is confusing because the date range for the search criteria (i.e. claim dates) does not match the dates displayed in the search results (i.e. treatment dates). Need the ability to specify the search fields as treatment date or claim date.  
**Enhancement:** (126241) Now you can specify in the search criteria to search by claim date or treatment date. In the EDI Claims window, there is a **Based on** drop-down field (new) with the options Claim Date and Treatment Date.
Note: The Auto Batch Unsubmitted Claims window also displays this new drop-down field.

126243 - Improved ability to apply & update delay reason

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

**Issue:** In the Unsubmitted Procedures tab, if you highlight a claim record (containing no delay reason), the Delay Reason right-click option is enabled, and this is fine. However, if the claim record already contains a delay reason, this right-click option is disabled, preventing you from changing its existing delay reason. Need the ability to update existing delay reasons on claim records.

**Enhancement:** Now if you highlight a claim record containing a delay reason, the Delay Reason right-click option is enabled.

Also, you can highlight multiple records and apply a delay reason to the selected claim records. To do this:

1. From the list view, highlight multiple records.
2. Right-click to display a list of options.
3. Select the Delay Reason option.
   axiUm displays the Existing Delay Reason Warning window.

   - Yes: Selecting this button will *apply* the delay reason to those claim records that have none, and will also *update* the delay reason on those that have one.
   - No: Selecting this button will apply the selected delay reason to only those claim records that have none.

4. Click the Yes button.
   axiUm displays the Enter Delay Reason window.
5. From the Delay Reason drop-down field, select a delay reason.

6. Click the OK button.
   axiUm applies the selected delay reason to those claim records that have none and updates them on those that have one, closes the Enter Delay Reason window, and returns to the EDI Claims window.

126596 - Date search based on country of practice

Module: EDI Claims ~ EDI Claims window
Issue: In the EDI Claims window’s Submitted Procedures tab, the Date from drop-down field and the Date to drop-down field were renamed to the Trx Date from drop-down field and the Trx Date to drop-down field, respectively, and this is fine for US practices. Need axiUm to retain the previous field names for Canadian practices only.
Enhancement: Now axiUm changes these field names based on country of practice.

Setup:

1. Open the Regional System Settings window.
   Go to Maintenance module - System tab - System Options icon - System Options window - System Options section - Regional button.

2. In the System Settings section, select one of the following options:
   - Canada
     This option, if selected, indicates that the EDI Claim window’s Submitted tab displays the field names Date from and Date to.
   - USA
This option, if selected, indicates that the EDI Claim window’s Submitted tab displays the field names **Trx Date from** and **Trx Date to**.

### 126626 - New right-click options in EDI Claims window

**Module:** EDI Claims ~ EDI Claims window  
**Issue:** Currently if you are using axiUm 5.00.17 set up for US practice, the Unsubmitted Procedures tab and the Submitted Procedures tab displays two right-click options:
  - Select Highlighted Rows
  - Deselect Highlighted Rows

These right-click options are available only if your practice is in the US, and only in version 5.00.17. Need the ability for all practices (US, Canadian, Dutch) to displays these right-click options, in all subsequent versions.

**Enhancement:** Now the above right-click options are available regardless of your country of practice.

### EHR

### 119940 - Now deselects the Show Deleted checkbox by default

**Module:** EHR ~ Patient Medical Alerts window  
**Issue:** Need the Patient Medical Alerts window (in EHR module - Alerts tab - Update Medical Alerts right-click option) to have the Show Deleted checkbox deselected by default.

**Enhancement:** Now the Patient Medical Alerts window deselects this checkbox by default. This is useful for reducing clutter by hiding outdated conditions (e.g. pregnancy) that no longer apply to the selected patient.

### 124977 - Improved eRx troubleshooting

**Module:** EHR - Medications tab  
**Issue:** There are two issues preventing axiUm Support from effectively troubleshooting eRx requests and responses:
  - Currently, axiUm logs only unsuccessful requests and responses between axiUm and DrFirst® Rcopia®. Need the ability to include successful logs.
  - Currently, axiUm uses an embedded browser, which hides the address bar. Need the ability to use the standard browser (i.e. the parameterized URL), which shows the address bar.
**Enhancement:** Now axiUm has the above abilities.

**Setup:**

1. Open the Station Options window.
   - Go to Maintenance module - System tab - Station Options icon.
2. Go to EHR section - Prescriptions section - eRxDebug (new).

![Station Options Window](image)

0 = No: Log only erroneous requests and responses, and continue using the embedded browser.

1 = Yes: Log all SSO (single sign-on) connections, requests, and responses; and use the standard browser.

---

**125820 - Improved prescription entry on behalf of provider**

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

**Issue:** Currently, when dental assistants enter prescriptions on behalf of a provider, they can prescribe only those drugs accessible to themselves. Need the ability to grant dental assistants access to the same drugs granted to the provider.

**Enhancement:** Now axiUm has extended the proxy mode to prescription entries.

**Setup:**

1. Open the Desktop Settings window.
   - Go to Maintenance module - System tab - Desktop icon.
2. Go to the Display Settings section and select the Show Provider # checkbox. This will ensure that the status bar will display the provider’s number of the provider you are entering on behalf of.

3. Click \( \times \) (close).
   axiUm saves the changes, closes the Desktop Settings window, and returns to the Maintenance module.

4. Open the Users window.
   Go to Maintenance module - Office tab - Users icon - Users List window - run a search - select a record for dental assistant - \( \text{Edit Record} \).

   Make sure the provider is granted a dental assistant user level. For our example, we will select Alan Davis.

5. Click the Clinical tab.

6. Go to the Can Prescribe section and select the With inherited rights when "Entry on Behalf of" checkbox (new).
7. Click the Save button.
   axiUm saves the changes.

8. Click the Close button.
   axiUm closes the Users window and returns to the Maintenance module.

Usage:

1. Log in as the dental assistant you set up above. In our example, this is Alan Davis.

2. From the Tools menu, select the Entry on Behalf of Provider option.
   axiUm displays the Entry on Behalf of Provider window.

3. Select the Provider option and in the field, enter a provider code. For our example, we will enter D1234, David Caan.

4. Click the OK button.
   axiUm displays your name (the proxy provider) and also the dentist's provider number in the status bar.

   You now have access to all of the drugs that the selected provider can access, and you can enter prescriptions on behalf of this provider.

5. Open the Patient Prescription Entry window.

   Go to EHR module - Medications tab and click, (Create a new Record) - New Prescription.
The Provider field displays the name of the provider for whom you are entering this prescription.

6. Enter the fields and options. For our example, we will enter the following:
   - Drug: This drop-down field displays all drugs accessible to the dentist, even if you (the dental assistant) have no access to them. For our example, we will enter Amoxicillin.
   - Dosage: 125 mg/5ml

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

8. Click the Done button.
   axiUm displays the User Verification window (new).

   Use this window for the provider to confirm the prescription that you (the proxy provider) entered. axiUm displays the dentist name in the ID field.

   - Cancel: Clicking this button displays a message indicating that axiUm cannot continue without authorization.

   - OK: Clicking this button approves the proxy entry.

9. In the Password field, enter the dentist's password.
10. Click the OK button.

axiUm authorizes the prescription entry, closes the Patient Prescription Entry window, and prints the prescription. The prescription printout displays the dentist's name, not your (proxy Provider) name.

axiUm adds a new prescription record in the Medications tab's list view (Prescriptions option). The record reflects the dentist provider's name, not your (proxy provider) name.

<table>
<thead>
<tr>
<th>Date</th>
<th>Drug</th>
<th>Dose</th>
<th>Total</th>
<th>Refills</th>
<th>Provider</th>
<th>Provider Name</th>
<th>Approved By</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/06/2009</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>01/06/2009</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>04/11/2011</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>04/11/2011</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>04/11/2011</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>04/11/2011</td>
<td>Acetaminophen</td>
<td>200 mg</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Clarithromycin</td>
<td>240 tablets</td>
<td>0</td>
<td></td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
<td>Admin, Axum</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
<tr>
<td>06/06/2012</td>
<td>Amoxicillin</td>
<td>125 mg/5ml</td>
<td>0</td>
<td></td>
<td>D1234</td>
<td>Cain, David</td>
<td>Cain, David</td>
</tr>
</tbody>
</table>

Note: If you (the proxy provider) require approval for prescriptions, axiUm first displays the User Verification message, and then the User Authentication-prescription approval message.

125821 - Removed unnecessary prescription fields
Module: EHR ~ Patient Prescription Entry window

Issue: In the Patient Prescription Entry window (in EHR module - Medications tab - Create a new Record - New Prescription option), some disabled fields are automatically entered by axiUm when you save the new record. Because there is no need for you to enter these fields, they should be removed from the Patient Prescription Entry window to avoid confusion.

Enhancement: Removed the following fields from the Patient Prescription Entry window:
  - Presc. #
  - Doctor
  - Approved On
Current:

![Patient Prescription Entry window]

New:

![Patient Prescription Entry window]

Note that axiUm still displays these fields in the following windows:

- View Patient Prescription window
- Refill Patient Prescription window
- Void Patient Prescription window

---

**125822 - Ability for Patient Medication Entry window to remain open**

**Module:** EHR ~ Patient Medication Entry window  
**Issue:** Currently, when you are in the Patient Medication Entry window (in EHR module - Meditions tab - ✽ (Create a new Record) - Existing Medication option) and you click the OK button, axiUm saves your entries and closes this window. Need the ability for the Patient Medication Entry window to remain open so you can enter multiple records for the same patient without having to re-open it.

**Enhancement:** Now the Patient Medication Entry window displays an Add button (new). Clicking this button saves the entries, clears the fields, and leaves the window open for you to enter another record.
125903 - Allow entry of value “PRN” for refills

**Module:** EHR - Medications tab

**Issue:** Need the ability to enter prescription and medication refills using the value PRN (meaning "pro re nata" or “as needed”). Currently, axiUm restricts you to entering only numeric values (e.g. 99) in the Refill fields of various windows.

**Enhancement:** Now has the ability to enter refills using the value PRN. axiUm displays a PRN checkbox (new) that you can select in the following windows:

- Patient Prescription Entry window
- Patient Medication Entry window
- Edit Patient Medication window

The PRN checkbox is also displayed in the following windows, but disabled:

- View Patient Prescription window
- Refill Patient Prescription window
- Void Patient Prescription window

Also, in the EHR window’s Medications tab, axiUm displays the value PRN in the Refills column.

![Patient Medication Entry window](image)
124042 - Now supports multiple time zones

Module: Other

Issue: Currently, axiUm only supports clients where the server and all of the locations are in the same time-zone. Need the ability to support multiple time zones.

Enhancement: Now supports multiple time zones. This is useful if you are a scheduling staff based in one time zone and you schedule providers based in a different time zone.

Setup:

1. Open the Desktop Settings window (changed).

![Desktop Settings window]

2. Go to the Other Settings section.

![Other Settings window]

3. In the **Time Zone Offset (from server)** field, enter the number of hours that your local time zone is offset from the server’s time zone. If you do not set this field, axiUm will audit all activities performed in your local system using the server’s time zone, resulting in incorrect audit times.

Note: The multi-time zone setting does not affect users. This enhancement was implemented strictly for accurate auditing.
124381 - New customized indicators on the status bar

Module: Status Bar

Issue: Need the ability to see additional indicators in axiUm to quickly give the user information about the clinic, the current patient, etc.

Enhancement: Now has the ability to customize indicators to be displayed on the status bar. axiUm can calculate these indicators based on information from a database query. They may be refreshed manually or on a timer (i.e., every 30 seconds). axiUm can display the indicators directly in the status bar (embedded) or in a pop-up area accessed by clicking the status bar.

Each indicator is associated with an Oracle function that is coded to return information from a database query.

The indicator can be displayed in any of the following formats:
- image (bitmap)
- text (up to 3 chars returned by function)
- color block

You can view the tooltip on each indicator to view the full description (i.e., SP = Self Pay patient).

The indicators displayed are defined by user. This lets a user (e.g. doctor) to view different indicators than other users (e.g. cashier).

The usage of this feature is limitless, as any data may be accessed. Examples:
- Patient Insurance Type: HMO, PPO, Self-Pay, Dual coverage, Medicaid, Grant Fund
- Patient Perio Risk Category: Severe, High, Medium, Low
- Patient Caries Risk Category: Severe, High, Medium, Low
- Patient Last Exam: Over 12 months, 6-12 months, within past 6 months
- Doctor has patient in waiting room (based on appt checked-in, but patient not seated)
- DOR: Initials of DOR (tooltip displays full name)
- Number of patients in the clinic: Counts the number of appointments in the clinic that are checked-in but not yet checked-out.

Setup:

1. Open the Status Bar Indicators window (new).
   Go to Maintenance module – System tab - Status Bar Indicators icon (new).
Use this window to set up a status bar indicator.

The Type drop-down field has the following options:

- **Image**: Selecting this option indicates that the indicator is an icon and will display an image (bitmap).

- **Text (Mapped)**: Selecting this option indicates that the indicator will display text (up to 3 characters). The text displayed is associated to a return value from the function (e.g. a value of 0/1 could be mapped to Yes/No or True/False). The text color and background color are customizable.

- **Text (Returned)**: Selecting this option indicates that the indicator will display the text returned by the function. The text color and background color are customizable.

For each indicator, specify if it is based on the current patient. If checked, the indicator will be refreshed when the current patient changes.

An optional refresh time can also be set. This field may not be necessary for indicators that are based on the current patient, as these will refresh automatically when the current patient changes.

2. **Click** ![Image](image.png) (Status Bar Indicator Values).
   axiUm displays the Status Bar Indicator Values window.

   ![Image](image.png)
   Use this window to define the value of the selected status bar indicator.

   For **Image** indicators, will link the various function return values to an image and set a tooltip for each.

   For **Text (Mapped)** indicators, will link the various function return values to a text string and tooltip and indicate the text color and background color to use.

3. **Click** ![Image](image.png) (Level Access).
   axiUm displays the Status Bar Indicator Access window (new).
Use this window to set the display format for the given indicator and user level.

The Show Indicator drop-down field displays the following options:

- **No**: Selecting this option hides the indicator from the status bar.
- **On Status Bar**: Selecting this option displays the indicator on the status bar.
- **In the Indicator Popup**: Selecting this option displays the indicator in a popup window (accessed by clicking the up arrow on status bar)

4. Click (Level Access). axiUm displays the Status Bar Indicator Access by Level window (new). This is the easiest way to manage indicator access/display by user level.

Use this window to grant access rights and display preferences of each status bar indicator for the selected user level.
125010 - Removed epoch times from axiUm database

**Module**: Database

**Issue**: In preparation for supporting multiple time zones, need to make changes to the storage of some of the date fields and time fields in the database that are currently stored in EPOCH format (i.e., time since Jan 1, 1970).

**Enhancement**: These changes affect the following tables/fields in the database (note: there are no changes to the axiUm user interface):

<table>
<thead>
<tr>
<th>Table</th>
<th>Old Field Name (EPOCH)</th>
<th>New Field Name (Oracle Date/Time)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALERTP2</td>
<td>Time</td>
<td>AddDateTime</td>
</tr>
<tr>
<td>ALERTP2H</td>
<td>Time</td>
<td>AddDateTime</td>
</tr>
<tr>
<td>ANSWER2</td>
<td>Time</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>APPOINT</td>
<td>Modified</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>APPTTHIS</td>
<td>Modified</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>AP_NOTE</td>
<td>AP_NOTE_FTime</td>
<td>AddDateTime</td>
</tr>
<tr>
<td>AP_NOTE</td>
<td>AP_NOTE_LTime</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>DETAIL2</td>
<td>Time</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>GRAPHP2</td>
<td>Time</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>GRAPHHIS</td>
<td>Time</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>NOTES2</td>
<td>FTime</td>
<td>ModifiedDateTime</td>
</tr>
<tr>
<td>TREATME2</td>
<td>Time</td>
<td>ModifiedDateTime</td>
</tr>
</tbody>
</table>

127325 - Increase field in Log On window

**Module**: Logon

**Issue**: When you go to the Tools menu and select the Log On As User option, axiUm displays the Log On window. In the As Station field, you can enter a maximum of 12 characters. Need to increase the maximum number of characters allowed.

**Enhancement**: Now you can enter a maximum of 128 characters.
Info Manager

103880 - New fields in the Claims report

Module: Info Manager - Billing tab

Issue: Need the ability to identify the insurance companies in the Claims report as either a dental insurance company or a medical insurance company.

Enhancement: Now has the ability to identify the insurance companies in the Claims report as either a dental insurance company or a medical insurance company.

Usage:

1. Go to the Info Manager module - Billing tab - Claims category.

2. Open the Report Definition window.
   Go to the list view and select the Edit Report right-click option.

3. Go to the Files list box.

   The following files are new:
   - Insurance1
   - Insurance2
   - Insurance3

4. Highlight a file. For our example, we will select Insurance1.

5. Go to the Fields list box, and based on the file selected above, highlight one of the following new fields
   - Ins1 Type of Cvg
- Ins2 Type of Cvg
- Ins3 Type of Cvg

The following new fields have also been added to the three insurance files:
- Contract Code
- Default Fee
- Contract Fees
- Co-pay Amt
- ID Qualifier
- EDI Claims
- Network
- EDI Format

6. Click the Add button.
axiUm moves the field **Insurance1. Ins1 Type of Cvg** from the Fields list box to the Selected list box.

7. Repeat steps 3 - 6 to add the following:
- Insurance2 Ins1 Type of Cvg
- Insurance3 Ins1 Type of Cvg

You now have three type-of-coverage fields from three insurance records.
8. Click the OK button.
   axiUm closes the Report Definition window and returns to the Info Manager window.

9. Click the Search button.
   axiUm runs the report.

   The column headings Ins1 Type of Cvg, Ins2 Type of Cvg, and Ins3 Type of Cvg displays
   the insurance coverage type as either Dental or Medical.

---

**Inventory**

**127445 - Increased inventory bar code field**

**Module:** Inventory  
**Issue:** Need to increase the maximum character length in many fields.  
**Enhancement:** Now the following fields hold up to 20 characters:

- Inventory Product window’s UPC code field
- Inventory Product window’s UPC code field
- Inventory Location Codes window’s Bar Code field
- Transfer Products window’s Input field
- Receipt of Goods window’s Input field
- Inventory Adjustment window’s Input field
- Inventory Count window’s Input field
- Order Filling window’s Input field
67500 - Ortho billing to use treatment instructor
Module: Maintenance ~ Ortho Billing window
Issue: When generating ortho monthly fees, need the approving instructor (displayed on the fee line) to be the instructor associated to the treatment of the ortho payment plan. This way, when you set up to use the approval faculty on the claim form, axiUm prints the correct doctor on the claim form. Currently, axiUm displays the user running the ortho billing process.
Enhancement: Now in the above scenario when you run the ortho billing process (in Maintenance module - System tab - Processes icon - Processes window - Ortho Billings button), axiUm displays the approving user (indicated on the ortho treatment plan’s first ortho treatment record) instead of the approving instructor (the user running the ortho billing process).

119967 - Ability to sort list views in most windows
Module: Maintenance
Issue: Need the ability to sort the list views in all Maintenance windows. Currently only a few windows have this functionality.
Enhancement: Now most list views in axiUm windows have the ability to sort by clicking on a column heading.

119978 - Ability to define tooth-specific insurance coverage
Module: Maintenance ~ Select Tooth Sites window (new)
Issue: Need a way to specify that a benefit plan only covers some procedures for certain sites and not others.
Enhancement: Now you can specify that a benefit plan covers only certain tooth site(s) for some procedures. This works in conjunction with age-specific coverage. For example, you can indicate that for D1351, sealants, the plan covers 75% for the first permanent molars up to age 9 and the second permanent molars up to age 15.

There is now an Only covered for certain sites checkbox (new) in the following windows:

- Edit Coverage Template window
  Go to Maintenance module - Insurance tab - Benefit Plans tab - Benefit Plan List window - (Edit/View Benefit Plans) - Edit Coverage Template window - Plan section - Coverage button - Linked Coverage Template window - (Use Template) - Coverage Template List window - (Coverage Items)
- Template Age-specific Coverage window
  Go to Maintenance module - Insurance tab - Benefit Plans tab - Benefit Plan List window -
  ![Edit/View Benefit Plans](new) (Edit View Benefit Plans) - Edit Coverage Template window -
  ![Age-specific Coverage Details](new) (Age-specific Coverage Details)

Selecting this checkbox displays the Sites button (new). Clicking the Sites button displays the
Select Tooth Sites window (new). Use this window to select the tooth sites applicable to the
selected benefit plan coverage.
124932 - Consolidating sealants on NY Medicaid claims

**Module:** Maintenance - Insurance tab

**Issue:** Currently, axiUm consolidates sealant-type procedures on limited-visit type claims. However, this causes rejections for limited-visit type insurance companies that are not NY Medicaid. Need axiUm to have the ability to consolidate sealant-type procedures for limited-visit type claims which are specifically NY Medicaid.

**Enhancement:** Now axiUm handles sealant-type treatment claims in the following way:

<table>
<thead>
<tr>
<th>If:</th>
<th>Then:</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's a paper claim</td>
<td>axiUm does not consolidate</td>
</tr>
<tr>
<td>It's EDI (NYMed EDI version), Limited Visits</td>
<td>axiUm does not consolidate</td>
</tr>
<tr>
<td>and Rate based</td>
<td></td>
</tr>
<tr>
<td>It's EDI (NYMed EDI version) and Limited</td>
<td>axiUm consolidates</td>
</tr>
<tr>
<td>Visits and APG method</td>
<td></td>
</tr>
</tbody>
</table>

125702 - Now displays patient charge in various windows

**Module:** Maintenance - Insurance tab

**Issue:** In various insurance coverage windows, need axiUm to show the patient charge amount for each line (e.g. basic, major, ortho). Having this information readily available helps you explain coverage details to the patient.

**Enhancement:** axiUm now displays a Pt Charge column heading in the following windows’ list views:

- Benefit Plan Coverage
- Coverage Template List
- Edit Coverage Template
- Linked Coverage Template
Below is an example of this new column heading in the Coverage Template List window:

![Coverage Template List](image)

**126192 - Improved speed of auto-batch**

**Module:** Maintenance ~ Auto Batch Unsubmitted Claims window

**Issue:** In the Auto Batch Unsubmitted Claims window (in Maintenance module - System tab - Processes icon - Auto Claims button), when you run the auto-batch, axiUm takes a long time to process. Need to improve the speed of auto-batch.

**Enhancement:** Improved the speed of auto-batch.

---

**123791 - Improved the Guarantor tab**

**Module:** Patient Info window - Guarantor tab
**Issue:** The Guarantor tab’s Guarantor Information section is confusing. Need to improve this section to make the guarantor search more intuitive.

![Guarantor Tab Image]

**Enhancement:** Improved the guarantor search by replacing (ellipsis) with the Select Guarantor button (new). Clicking this button still displays the Guarantor Rolodex window.

![Enhanced Guarantor Tab Image]

---

**Perio Chart**

### 125083 - Disabling Perio still allows access through EHR

**Module:** Perio Chart

**Issue:** Need the ability to disable the Perio module from the axiUm main screen, the Actions menu, and the Desktop, while retaining the ability to access it through the EHR module’s Perio tab.

**Enhancement:** Now you can disable the Perio Chart module for a select user level (e.g. Dental Student) while still granting them access through the EHR module only. This is useful if you want to force providers to begin their perio workflow in the EHR module.

**Setup:**

1. Open the Power Admin module.

2. From the first drop-down field, select the Role option.

3. From the second drop-down field, select a role. For our example, we will select the Dental Student option.
4. Go to Main Program - Main Menu.

5. Deselect the Perio Chart checkbox.

6. Go to Dialogs - Electronic Health Record (EHR) - Perio - EHR Perio. axiUm displays the EHR Perio window.

7. Make sure all elements are green or accessible.

8. Click (close). axiUm closes the EHR Perio window.

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

10. Click the Close button. axiUm closes the Power Admin module.

Usage:

1. Log into axiUm as a user with the level Dental Student we defined in the setup.
The Perio module is inaccessible from the following areas of axiUm:

- Icon: The Perio Chart icon (displayed between the EHR icon and the Ortho Manager icon) is now hidden.

- The Actions menu: The Perio Chart option is now disabled.

- The Desktop: Clicking on (Perio Chart) displays a message indicating that access to this module is denied.
2. Open the EHR module’s Perio tab.
   All items we indicated in the Power Admin module as green or accessible are still available.

---

**Rolodex**

**124137 - New billing rule for rate-based NY Medicaid coverage**

**Module**: Rolodex ~ Patient Approvals window

**Issue**: For patients using NY Medicaid insurance (flat-rate, limited-visit), if they receive both covered and non-covered procedures on the same day, they pay $0 for the non-covered procedures. Need the ability to change this rule.

**Enhancement**: Now has the ability to change the rule for rate-based NY Medicaid coverage.

**Setup**:

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

2. Go to Transactions section - Transaction section - NYMedBillNonCovered (new).
• 0 = Off: This retains the current behavior. If the patient received covered and non-covered procedures on the same day, the patient is charged $0 for the non-covered procedures.

• 1 = On: Bill patient for non-covered NY Medicaid treatments even if a NY Medicaid claim exists on the same day. Selecting this option uses the fee schedule associated to their insurance to determine if the procedure is covered. Then:

  If the procedure is covered:
  o axiUm charges the insurance $0 and charges the patient $0.

  If the procedure is not covered:
  o axiUm charges the fee schedule associated to the billing ID.
  o axiUm charges the insurance $0 and charges the patient the amount in the fee schedule.

---

Scheduler

38624 - Changed non-clinic times to clinic time exceptions

Module: Scheduler ~ Provider Clinic Time Exceptions (changed)
**Issue:** Need to change the non-clinic time feature so that you can indicate that they are still available for clinic time but only at a specific clinic.

**Enhancement:** Changed the non-clinic time feature to a clinic time exceptions feature.

**Setup:**

1. Open the Provider Working Schedules window.
   Go to Maintenance module - Scheduler tab - Provider Schedules icon.

   The [Non-Clinic Times] has been renamed to [Clinic Time Exceptions].

   **Current:**

   ![Current](image1.png)

   **New:**

   ![New](image2.png)

2. Click [Clinic Time Exceptions].
   axiUm displays the Provider Clinic Time Exceptions window (changed, this used to be called the Provider Non-Clinic Times window).

   **Current:**

   ![Current](image3.png)

   **New:**

   ![New](image4.png)
3. Go to the Clinic Time Exception section.

![Clinic Time Exception Window]

**Only Available in** (new): This drop-down field indicates that this is the only clinic that the selected provider is available in during their exception.

4. Enter the fields and options. For our example, we will enter the following:
   - Provider: David Caan
   - Description: On Rotation
   - Display Desc: On Rotation
   - Only Available in: Main Clinic
   - Date: 06/06/2012
   - Color: **(aqua)**

![Completed Provider Clinic Time Exception]

5. Click [Add a new Record].

   axiUm adds the new exception to the list view.

6. Click [Close] (close).

   axiUm closes the Provider Clinic Time Exceptions window and returns to the Maintenance module.
Usage:

Then when you go to the Scheduler window’s Active tab or Weekly tab, the provider’s exception time is displayed in the appointment book, and hovering over this time displays a popup indicating the clinic they can be scheduled in. The provider will be prevented from being booked in any other clinic during this time.

Active tab (chair view):

![Active tab (chair view)](image)

Active tab (book view):  
Weekly tab:

![Active tab (book view)](image)  
![Weekly tab](image)

121023 - More appointment display options
Module: Scheduler ~ Appointment Display Options window
**Issue:** Currently in the Appointment Display Options window, you can define five display options. Need an additional five custom fields to allow for a total of 10 display options.

**Current:**

![Appointment Display Options window]

**Enhancement:** Now has the ability to define five additional display options. The Appointment Display Options window displays the fields Line 6 - Line 10 (new).

**New:**

![Appointment Display Options window with additional display options]

---

**124401 - New scheduling notes for specific providers**

**Module:** Scheduler

**Issue:** Need the ability to add provider-specific notes in the scheduler. This helps you:

- As a provider, you can record preferences to assist the scheduling staff in booking appointments.
- As a scheduling staff, you can view the provider’s notes and preferences for booking appointments with that provider.
Enhancement: Now has the ability to enter scheduling notes for specific providers.

Setup:

1. Open the Provider Scheduling Note Codes window (new).
   Go to Maintenance module - Scheduler tab - Provider Schedule Note Codes icon (new).

2. Click (Clear Data).
   axiUm clears the fields.

3. Enter the fields. For our example, we will enter the following:
   - Code: CBS
   - Text: Cannot be scheduled on:

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 Provider Scheduling Note Codes window and returns to the Maintenance module.

Usage:

1. Go to the Scheduler module.

2. Go to the status bar and click on the provider field.
axiUm displays a list of options (new).

3. Select the Select Provider option (new).
axiUm displays the Providers List window to select from (Note: in previous versions, clicking on the status bar’s provider field immediately displayed this window). For our example, we will search for and select Ken Klaahsen, G150. Alternatively, click on a Provider column heading in the Active tab to select a provider.
4. Click on the provider field again and this time select the Provider Scheduling Notes option.
axiUm displays the Provider Scheduling Notes window (New).

5. Read the next section for instructions on performing the following tasks:
   - Creating and viewing a scheduling note for general use
   - Creating and viewing a scheduling note for a date range
   - Creating and viewing a scheduling note for a second provider

Creating and viewing a scheduling note for general use:

1. In the Provider field, enter the provider’s ID. This field defaults to the provider displayed in the Scheduler module’s status bar’s provider field. For our example we will use the default, G150.

2. Click the Update Notes button.
   axiUm displays the Update Provider Scheduling Notes window (new). Use this window to create scheduling notes.
3. Click (Clear Data).
   axiUm clears the fields.

4. Go to the Note text box and click (ellipsis).
   axiUm displays the Provider Scheduling Note Codes window.
5. From the list view, highlight a record. For our example, we will highlight CBS, Cannot be scheduled on:

6. Click ☐️ (close).

axiUm closes the Provider Scheduling Note Codes window and returns to the Update Provider Scheduling Notes window. The selected note code is displayed in the Note text box.

7. In the Note text box, we will add the text: June 30

Now the text reads: Cannot be scheduled on: June 30

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

9. Click (close).
   axiUm closes the Update Provider Scheduling Notes window and returns to the Provider Scheduling Notes window. The updated note code is displayed in the text box.

10. Click (close).
    axiUm closes the Provider Scheduling Notes window and returns to the Scheduler module.

11. To view the note we just entered, select any date (e.g. next week) for this provider and open the Provider Scheduling Notes window. axiUm displays the note you entered. This note remains with this provider until you delete the note.

Creating and viewing a scheduling note for a date range:

1. In the Provider field, enter the provider's ID. For our example, we will enter G150.

2. Click the Update Notes button.
   axiUm displays the Update Provider Scheduling Notes window (new).

   For our example, we will modify an existing note and apply a date range.
3. From the list view, highlight the record we created earlier.

4. Enter the fields and options. For our example, we will modify an existing note and apply the date range by entering the following:
   - **Start Date:** 06/30/2012
   - **End Date:** 09/05/2012
   - **Note:** In this text box, we will use the existing note **Cannot be scheduled on: June 30** and change it to **Cannot be scheduled on: June 30 – September 5 (summer holidays).**

5. Click  (Modify Record).
   axiUm saves the changes and updates the record in the list view.
6. Click close. axiUm closes the Update Provider Scheduling Notes window and returns to the Provider Scheduling Notes window. The selected note code is not displayed in the text box because we have not reached the start of the date range (i.e. June 30, 2012).

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>30/06/2012</td>
<td>05/09/2012</td>
<td>Cannot be scheduled on: June 30 - ...</td>
</tr>
</tbody>
</table>

7. To view the note we just entered, select the Show for checkbox and in the date field, enter a date within the date range you entered for this note (e.g. June 30, 2012). axiUm displays the note in the text box. This note remains with this provider until you reach the end of the date range (September 5, 2012).

Creating and viewing a scheduling note for a second provider:

1. Click the Secondary Provider (up arrow). axiUm displays additional fields.
2. In the Provider field, select a second provider. For our example, we will enter G151.

3. Click the Update Notes button and enter a note for this provider.

4. Click (close).
   axiUm closes the Provider Scheduling Notes window and returns to the Scheduler module.

5. From the status bar, select the second provider as the current provider. For our example, we will search for and select Lisa Jaaks, G151.

6. Open the Provider Scheduling Notes window. The second provider is displayed at the top. Because we specified no date range, this note will continue to display for this provider until you delete the note.
You can also access the Update Provider Scheduling Notes window from the following windows:

- Provider Working Schedules window’s Update Notes button (new)

- Appointment Expert window’s (full view mode) Provider Scheduling Notes right-click option (new)

- Appointment Expert window’s (preview mode) Provider Scheduling Notes right-click option (new)
In the Appointment Expert windows (both modes), if you run a search for a provider and also a second provider, and these providers both have scheduling notes for the selected date, the Provider Scheduling Notes window displays both providers’ notes in this window. Scheduling staff can then use this information to make informed decisions when booking appointments.

Tips -- Leave the Provider Scheduling Notes window open while you do the following, and the content displays notes for the associated provider and date:

- In the Scheduler module’s Active tab, highlight different time blocks.
- In the Appointment Expert window, highlight different records from the search results.

---

**124528 - Now shows background color**

**Module:** Scheduler - Active tab

**Issue:** If a column contains background color (e.g. ideal day preferences), and the column is fully booked, you cannot see the color behind it. This creates two problems:

- You are unaware of the information in the background (e.g. clinic time descriptions).
- You cannot create a double-booking for the provider by clicking on the background (there is none).
Enhancement: Now the scheduled appointment block is slightly narrower to allow the background color to show. If there is no background color, the background displays in beige. You can click on this area to double-book this time block.

<table>
<thead>
<tr>
<th>Schedule - Grad Clinic Book</th>
<th>(Tue, Jun 5, 2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>7:00a</td>
<td></td>
</tr>
<tr>
<td>7:30a</td>
<td></td>
</tr>
<tr>
<td>8:00a</td>
<td>Jane Doe (F33)</td>
</tr>
<tr>
<td></td>
<td>250</td>
</tr>
<tr>
<td></td>
<td>4HR - 4 Hour Appointment</td>
</tr>
<tr>
<td>8:30a</td>
<td></td>
</tr>
<tr>
<td>9:00a</td>
<td></td>
</tr>
<tr>
<td>9:30a</td>
<td></td>
</tr>
<tr>
<td>10:00a</td>
<td></td>
</tr>
<tr>
<td>10:30a</td>
<td></td>
</tr>
<tr>
<td>11:00a</td>
<td></td>
</tr>
<tr>
<td>11:30a</td>
<td></td>
</tr>
<tr>
<td>12:00p</td>
<td></td>
</tr>
<tr>
<td>12:30p</td>
<td></td>
</tr>
<tr>
<td>1:00p</td>
<td></td>
</tr>
</tbody>
</table>

**125085 - New popup windows**

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

**Issue:** Need the ability to display additional information when you select an appointment record in the Patient Appointments window or the Family Appointments window.
**Enhancement:** Now axiUm has the ability to display customized details about the highlighted appointment record in the Patient Appointments window or the Family Appointments window.

**Setup:**

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

2. Go to the Scheduler Type section.

3. Click on the List Popups button (new).  
   axiUm displays the List Popup Options (Appointments) window (new).
Use this window to define the type of appointment details you want axiUm to display in the popup window.

**Automatically when appointment is selected:** This option, if selected, indicates that when you highlight a record, axiUm automatically displays the popup window. If you close the popup window and select a different record, axiUm displays another popup window.

**Manually by pressing the spacebar:** This option, if selected, indicates that when you highlight a record and you want to view the popup window, you must select the Additional Info (Spacebar) right-click option or press the spacebar.

**Line 1-10:** These 10 drop-down fields display the same options as the Line 1-10 drop-down fields in the Appointment Display Options window (in Scheduler - (Options/Settings) - Scheduler Options window - Display button). These drop-down fields display details related to appointments.

4. Enter the fields and options. For our example, we will enter the following:
   - Manually by pressing the spacebar: selected
   - Line 1: Patient Name option
   - Line 2: Patient Chart# option
   - Line 3: Appt Provider option
5. Click the Accept button.
   axiUm saves the entries, closes the List Popup Options (Appointments) window, and returns to the Scheduler Options window.

6. Click the Accept button.
   axiUm closes the Scheduler Options window and returns to the Scheduler window.

Usage:

1. Open the Patient Appointments window or the Family Appointments window.
   Go to Scheduler module - Rolodex - Rolodex (Select Patient) window - double-click a patient name.

2. From the list view, highlight a record.

3. Do one of the following:
   - Press the spacebar.
   - Right-click to display a list of options and select the Additional Info (Spacebar) option (new).
axiUm displays a popup window. This window contains the details you defined in the setup.

4. From the popup window, click ✗ (close).
   axiUm closes the popup window.

The same popup window is also available in the following windows:

- **Patient Card window**
  Go to Rolodex module - ☐ (Patient Card)

- **Appointment Lists window - Appointments tab, Wait List tab**
  Go to Scheduler module - ☐ (List)

- **Provider Requests window**
  Go to Scheduler module - ☐ (Provider Requests)
• Scheduler window - Availability tab
  o Active tab
  o Request tab
  o History tab

• Scheduler window - Pending tab

• Appointment Planning window
  Go to Scheduler module - Rolodex - Rolodex (Select Patient) window - double-click a patient name - Patient Appointments window, Family Appointments window - Planning button

• Personal Planner window - Appointments tab

---

125704 - New right-click options

**Module**: Scheduler ~ Appointment Lists window

**Issue**: Need the ability to access the Appointment Expert window from the Appointment Lists window’s Wait List tab.

**Enhancement**: The Schedule with Expert right-click option (new) is now available from the Appointment Lists window’s Wait List tab.

Also, the same right-click option is also available from the Scheduler window’s Pending tab.
Module: Scheduler

125827 - New indicators for inactive planned treatments

Issue: When a planned treatment is marked as inactive, the treatment cannot be completed until you re-activate it. Need an indicator on inactive planned treatment records so providers are aware that these treatments cannot be performed, and also so that scheduling staff are aware that the appointment cannot be booked.

Enhancement: Now axiUm displays warning messages when you do the following:

- Plan an appointment for an inactive planned treatment:
  Plan Inactive Treatment Warning window: One or more of the selected treatments that you are planning is inactive. Are you sure you want to continue?

- Add an appointment for an inactive planned treatment:
  Schedule Inactive Treatment Warning window: One or more of the selected treatments that you are scheduling is inactive. Are you sure you want to continue?

- Add an appointment request for an inactive planned treatment
  Plan Inactive Treatment Warning window: One or more of the selected treatments that you are planning is inactive. Are you sure you want to continue?

- Reschedule an appointment for an inactive planned treatment
  Appointment Treatments Inactive Warning window: At least one of the planned treatments being performed during the appointment(s) is inactive. Are you sure you want to continue?
**Transactions**

**31873 - New custom fields**

**Module:** Transactions - Payment tab, Adjustment tab, Ins Pmt tab

**Issue:** Need the ability to create custom fields to display in the Transactions module for patient payments, adjustments, and insurance payments.

**Enhancement:** Now has the ability to define custom fields to display in the Transactions module for the following tabs:
- Payment tab
- Adjustment tab
- Ins Pmt tab

These custom fields can display additional information, for example, the department for which a patient payment is made. You can then run a report in the Info Manager module to include this information.

**Setup:**

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

2. Go to the Field drop-down field.
   The following options are new:
   - Adjustment 1 - Adjustment 2
     These two custom fields are displayed in the Transactions window's Adjustment tab.
   - Insurance Payment 1 - Insurance Payment 2
     These two custom fields are displayed in the Transactions window's Ins Pmt tab.
   - Patient Payment 1 - Patient Payment 2
     These two custom fields are displayed in the Transactions window's Payment tab.
In this example, we will create custom fields to display in the Transactions window’s Payment tab.

3. Select a custom field. For our example, we will select Patient Payment 1.

4. In the Description field, enter the label you want axiUm to display for this custom field. For our example, we will enter Department.

5. Click (Modify Record).
   axiUm saves the changes.

6. Click (close).
   axiUm closes the Custom Fields window and returns to the Maintenance module.

   We will now create options to select from this custom drop-down field.

7. Open the Custom Codes window.
   Go to Maintenance module - Basic tab - Custom Codes icon.
The Type drop-down field has the following new options:

- Adjustment 1
- Adjustment 2
- Insurance Payment 1
- Insurance Payment 2
- Patient Payment 1
- Patient Payment 2

8. Select the custom drop-down field you just created. In our example, this is Patient Payment 1 - Department.

9. Click (Clear Data).
   axiUm clears the fields.

10. Enter the fields and options. For our example, we will enter the following:
    - Code: ORTHO
    - Description: Orthodontics

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

12. Repeat steps 8-11 to create another record for PEDI, Pediatrics.

You now have two new records.
You now have a custom drop-down field called Department, and this drop-down field contains two options ORTHO and PEDI.

13. Click (close).
   axiUm closes the Custom Codes window.

Usage:

1. Go to the Transactions window’s Payment tab’s Payment section.
   The custom label Department is displayed.

2. Click on the Department drop-down field.
   The two custom options ORTHO and PEDI are displayed.

Additional custom fields:

Follow the setup instructions described above to customize the two fields in the Adjustment tab. Use the custom fields Adjustment 1 and Adjustment 2.
Follow the setup instructions described above to customize the two fields in the Ins Payment tab. Use the custom fields Insurance Payment1 and Insurance Payment2.

Running Info Manager reports to include these new custom fields:

- Info Manager - Billing tab - Patient Payments category - Report Definition window - Patient Payment files
  - Pmt. Custom1 field (new)
  - Pmt. Custom2 field (new)

- Info Manager - Billing tab - Insurance Payments category - Report Definition window - Insurance Payment files
  - Ins.Pmt. Insurance1 field (new)
  - Ins.Pmt. Insurance2 field (new)

- Info Manager - Billing tab - Patient Adjustments category - Report Definition window - Patient Adjustments file
  - Adj. Adjustment1 field (new)
  - Adj. Adjustment2 field (new)

---

87373 - Removing delimiting characters in claim notes

**Module:** Transactions ~ EDI claim windows

**Issue:** If you submit a claim to EDI (Transactions module - Treatment tab - Submit button), axiUm displays the associated EDI claims window. Then if you go to the Comments/Remarks text box and enter a hyphen (-) or a colon (:), EDI rejects the claim. Currently, axiUm strips out only the tilde (~) and asterisk (*). Need the ability to also strip out the hyphen (-) and colon (:).

**Enhancement:** Now if you enter a hyphen (-) or a colon (:) in an EDI claim window’s Comments/Remarks text box, axiUm removes these characters before submitting the claim to EDI.
124825 - Co-pay allocation causes claim submission problems

**Module**: Transactions ~ EDI Claims windows  

**Issue**: For NY Medicaid claims, if there is a patient amount that has been paid (e.g. co-pay amount), need the option to suppress sending this information in the EDI file.

**Solution**: Two new station options have been added.

Set up:

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

2. Go to EDI Claims section - Claim Formatting section - NYMSuppressPtPaid item (new). This item applies to 4010 claims.

   ![Station Options Window](image.png)

3. In the Current Value field, enter one of the following options:
   
   - **0 - No**: Prevents axiUm from sending claims with a patient paid amount.
   - **1 - Yes**: Lets you submit claims with a patient paid amount. axiUm does not send this information to EDI.
125824 - Ability to set default option for payment plan type

Module: Transactions - Pmt Plan tab

Issue: Need the ability to set the default option displayed in the **Plan is for** drop-down field.

Enhancement: Now has the ability to set the default option displayed in the **Plan is for** drop-down field. This is useful for enforcing certain users to create only certain types of payment plans (e.g. ortho).

Setup:

1. Open the Transaction Options window.
   Go to Transactions module - **(Options/Settings).**

2. Go to the Miscellaneous section.
   There is a Default Pmt Plan Type drop-down field (new).

3. Select an option. For our example, we will select the Orthodontics option.

4. Click the OK button.
   axiUm saves the changes, closes the Transactions Options window, and returns to the Transactions module.

Usage:

1. Go to Transactions - Pmt Plan tab.

2. Click the New button.
   The **Plan is for** drop-down field displays the default we selected in the setup. You can select a different option.

Note: If you want users within a user level to always use the default payment plan type, go to the Power Admin module and make the **Plan is for** drop-down field yellow.
125910 - Improved billing process

Module: Transactions ~ EDI claim windows

Issue: Need to improve billings for office visit fees, missed appointment charges, and claims processing.

Enhancement: The following main enhancements have been made:

Office Visit Fees:

Setup:

- Need `tx_prg_WDE.sql` (the treatment package)
- Insurance must be set up correctly as a Parent Company and then individual insurance companies under the parent (this is determined by the `tx_prg_WDE.sql`).
- Must set up the procedure code OVFEE.

Usage:

- Amount of OVF is added in patient's insurance policy.
- An OVF is automatically created when the patient has insurance, plus an appointment and treatment in the same day but in this case, the OVF is created as a treatment, not an office charge.
- The OVF is submittable to insurance.
- You cannot add an office visit fee manually as a procedure code; it must be added through Transactions module - Treatments tab - Add Office Visit Fee right-click option.
- If dual insurance exists, no office fee is created.
- If a patient has dual coverage where insurance is primary and a different insurance is secondary, then office visit fee charged. The OVFEE amount is billed to primary as its own.
- Line item, and when secondary is billed, it consolidates the amount of OVFEE with most expensive treatment (OVFEE is not visible).
- If a patient has dual coverage and a different insurance is primary, an office visit fee is charged. For primary insurance, the OVFEE amount is consolidated with the most expensive treatment on the claim rather than showing a line item for the OVFEE. The secondary claim shows the OVFEE as a separate line item.
- OVF should not show in the EHR, only in the Transactions module.

Missed Appointment Charges:

Setup:

- Need a Missed appointment code in procedure codes. The amount can then be customized in the patient's benefit plan coverage.

Usage:

- When the patient has an appointment and you fail the appointment, a missed appointment charge is automatically created. It can also be set up to charge automatically by the overnight report.
- You cannot manually add a missed appointment charge as a treatment line but can do it by selecting the Add Non-Clinical Treatment right-click option.
Missed appointment charges can be submitted.

126102 - New options in the Receipt Printout window

Module: Transactions ~ Receipt Printout window

Issue: When a guarantor payment is distributed over multiple patients, axiUm displays these guarantor payment amounts incorrectly on the Patient Receipts report. Need axiUm to process this type of payment more effectively so it can display the correct amount.

Enhancement: Now has the ability to print receipts separately for patients and for guarantors. This changes the way axiUm generates receipts so that it displays the correct payment amount on that receipt.

Usage:

Open the Receipt Printout window (go to Transactions module - Payment tab - Receipt button).

![Receipt Printout window]

There are two new options:

- **For Patient** (new): Selecting this option indicates to print the Patient Receipt report. This report displays all payments made towards the current patient's account. This includes payments made directly on this patient's account, payments allocated to this patient's account, and payments held for this patient. This option works in conjunction with the **Include payments only** checkbox (see note below).

- **For Guarantor** (new): Selecting this option indicates to print the Guarantor Receipt report (new). This report displays payments that the selected guarantor made towards their own account, plus any other account for which they are responsible for paying (i.e. dependents). This option works in conjunction with the **Include payments only** checkbox (see note below).

Note: If you select the **Include payments only** checkbox, the selected receipt (patient or guarantor) shows only payments and excludes details (e.g. charges, treatment information). If you deselect this checkbox, the selected receipt shows both payments
and charges. However, the usage of standard reports versus custom reports may change the display of this information.

---

**126150 - Ability to manage remark codes in the EOB**

*Module:* Transactions ~ Explanation of Benefits (EOB) Details window  

*Issue:* In the Explanation of Benefits (EOB) Details window (in Transactions module - Treatment tab - EOB Details right-click option), the (Claim Remittance Advice Remark Code) is enabled only if system-added remark codes exist. However, clicking this icon opens the Remittance Advice Remark Codes window in read-only mode. Need the ability to add, modify, and delete these codes if no system-added remark codes exist.

*Enhancement:* Now the Explanation of Benefits (EOB) Details window has the (Claim Remittance Advice Remark Code) enabled at all times. Then:

- If no system-added remark codes exist, clicking this icon displays the Remittance Advice Remark Codes window and you can now add, delete, or modify the codes.

- If system-added remark codes exist, the icon clicking this icon displays the Remittance Advice Remark Codes window in read-only mode.

---

**126191 - Ability to re-send NY Medicaid claim as a replacement claim**

*Module:* Transactions ~ EDI claim windows  

*Issue:* This is for NY Medicaid only. Need the ability to re-send claims as a “replacement claims” rather than voiding it and sending it as a new claim.

*Enhancement:* Now axiUm has the ability to re-send NY Medicaid claims as “replacement claims”. There are two ways to do this:

- If you fix the claim before rebilling: When you submit the claim from the Transactions module, the ADA and HCFA claim windows displays the **Is replacement claim** checkbox (new) and a TCN drop-down field (new, TCN = Transaction Control Number) to indicate that this claim is a replacement claim. The TCN drop-down field displays any EOB records that have been entered for the claim or those that can be entered manually. These fields will only display for NY Medicaid claims.

- If you make no fixes to the claim before rebilling: You can re-batch the claim from within EDI Claims window’s Submitted tab, then go to the Unsubmitted tab and select the Edit Detail right-click option to display the claim window and enter the replacement claim information.
126673 - Improved eRx approval process

**Module:** EHR - Medications tab

**Issue:** With the current eRx workflow, the instructor must log onto axiUm to approve prescriptions entered by students. Need the ability for instructors to approve and send eRx prescriptions while students remain logged onto axiUm.

**Enhancement:** Now has the ability for instructors to approve and send prescriptions while the student remains logged onto axiUm. When you go to the EHR window’s Medications tab and click (Create a new Record) to display a list of options, there is an axiUm eRx Instructor Signin option (new). Selecting this option lets you sign onto eRx.

128749 - Ability to display full diagnosis description

**Module:** EHR - Tx History tab

**Issue:** When you create a diagnosis code, the Clinical Diagnosis Code window’s Description field lets you enter a maximum of 60 characters but the EHR window’s Tx History tab lets you see only 15 characters. Need the ability to display the full diagnosis description.

**Enhancement:** Now the Diagnosis column displays up to 50 characters depending on other settings.

Note: Only 5% of diagnosis descriptions in the COHRI list of standard diagnosis codes are longer than 50 characters. To view the entire description, double-click on a record to display the edit window (e.g. Edit In Process Treatment window) and hover over the Diagnosis field to display the tooltip.

To optimize the size of the Diagnosis column:
- Limit the display of optional columns (by going to the EHR window - Options/Settings - EHR Options window - Tx History tab - Hide Columns list box, and selecting columns to hide)
- Maximize the EHR window (by clicking (Maximize))
- Increase the resolution (by going to Maintenance module - System tab - Desktop icon - Desktop Options window - Display Settings section - Default Resolution drop-down field, and selecting a higher resolution)
- Enter diagnosis descriptions using title caps or lower case (using all upper case occupies more space)

128848 - New eRx printer controls

Module: EHR - Medications tab

Issue: Need the ability to select and configure the printer for eRx printing.

Enhancement: Now axiUm has the ability to display a printer prompt when you use eRx.

Default printer setup:

1. Open the Desktop Settings window.
   Go to Maintenance window - System tab - Desktop icon.

![Desktop Settings window]

2. Go to the Other Settings section and select the Always Select Printer for Printing checkbox.
   axiUm enables the Exceptions button.
3. Click the Exceptions button.
   axiuUm displays the Always Select Printer Exceptions window.

4. Select the **Always Use this printer without asking** checkbox. 
   This forces axiuUm to use the selected printer.

5. Click OK.
   axiuUm saves the changes, closes the Always Select Printer Exceptions window, and 
   returns to the Desktop Settings window.

6. Click OK.
   axiuUm closes the Desktop Settings window and returns to the Maintenance window.

Printer prompt setup:

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

2. Go to EHR section - Prescriptions section - eRxPrint item (new).
3. In the Current Value field, enter one of the following options:
   - 0 - Never: When you close the eRx module, axiUm does not print the eRx prescription.
   - 1 - Prompt: When you close the eRx module, axiUm displays the prompt, “New prescriptions have been entered into eRx. Do you wish to print these prescriptions?” Clicking the Yes button prints the prescription to the default printer selected in the previous setup.
   - 2 - Always: When you close the eRx module, axiUm automatically prints the prescription to the default printer selected in the previous setup.

---

**Info Manager**

**124259 - New A/R Reconciliation by Department reports**

**Module:** Info Manager  
**Issue:** Need to improve the speed when running the following reports:
   - AR Reconciliation report
   - AR Reconciliation Professional report

**Enhancement:** New versions of the above reports are now available, with improved processing time. You can set up axiUm to use the new or old version of these reports.

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

2. Go to Info Manage section - A/R Reconciliation section (new) - NewARRecByDep item (new).
   - 0 - No: Selecting this option indicates to use the old version.
   - 1 - Yes: Selecting this option indicates to use the new version.

3. Click (close) to close the Station Options window and return to the Maintenance module.

Then when you run the A/R Reconciliation report by department, axiUm displays the new version of the existing report.

---

**Maintenance**

**127502 - Spreadsheets are now available in iForms**

*Module:* Maintenance ~ Form Item - Question window
**Issue:** Need the ability to make spreadsheet-type questions available in iForms. Currently, if you open the Form Item - Question window (for a spreadsheet-type question), select the Available in iForms checkbox, and click the OK button, axiUm displays a message indicating that iForms does not support spreadsheets.

**Enhancement:** Now spreadsheet-type questions are available in iForms. In the above scenario, axiUm no longer displays this message.

Note: iForms with security questions are compatible with PatientAccess 2.10, to be released in July 2012.
129707 - Improved warning window

**Module:** EHR ~ Services Not Covered Warning window

**Issue:** Currently, when you create a *planned* treatment that is not covered by insurance, axiUm can display the Services Not Covered Warning window, and this is useful to know at the time you create the planned treatment. However, if you create an in-process treatment or a completed treatment, axiUm does not display the same message and you are unaware that the treatment is not covered. Need the ability to display this window when you create in-process treatment records and completed treatment records.

**Enhancement:** Now axiUm has the ability to display this window when you add in-process treatment records and completed treatment records.

**Setup:**

1. Open the EHR Options window.

2. Click the Chart Add tab.

3. Select the **Warn if Services not Covered when adding I or C txs (for insurance companies that warn for P txs)** checkbox.

4. Click the OK button.
axiUm saves the changes, closes the EHR Options window, and returns to the EHR window.

Then when you enter an in-process or completed treatment record, and the patient's primary insurance company does not cover this treatment, axiUm displays the Services Not Covered Warning window.

In addition to this, axiUm checks the patient's coverage templates (eligible amount and coverage percentage), limits (patient, family, item, and category), and frequency (item and category), and then indicates on the Services Not Covered Warning window why the service is not covered. axiUm displays this additional information in all cases.

This enhancement also applies to the Ortho module and the Perio module.

---

**Patient Attachments**

**118464 - New station option to suppress the printing of consent forms**

**Module:** Patient Attachments

**Issue:** If you are a provider who requires a patient consent form to be signed, and you enter a planned treatment in the EHR module, axiUm displays the Print patient Consent Question window asking if you want to print the consent. Need the ability to suppress the Print Patient Consent Question window but still print the consent form.

**Enhancement:** Now has the ability to suppress the Print Patient Consent Question window.

**Setup:**

1. Open the System Options window.
   
   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).
2. Go to EPR / Attachments section - Attachment Contract section - AskToPrint item (new).

3. In the Current Value field, enter one of the following options:
   - 0 - No: axiUm suppresses the Print Patient Consent Question window.
   - 1 - Yes: axiUm displays the Print Patient Consent Question window.
EDI Claims

131019 - Missing state license number causes EDI rejection

Module: EDI Claims
Issue: In 5010 EDI claims, the Billing Doctor No Qualifier is always G2, regardless of the setting in Maintenance window - Insurance tab - Insurance Companies - (Edit Record) - Insurance Company - Billing Numbers button - Billing Number window - Billing No field.
Also, if the billing doctor's phone number is blank, the claim is rejected.
Enhancement: If Billing Doctor No. Qualifier is 0B, 1G, G2 or LU, axiUm will use that value. If a different value exists, axiUm defaults them to G2.
Also, if the billing doctor's phone number is blank, axiUm uses the practice phone number.

EHR

128792 - Ability to define specific conditions on a consent form

Module: EHR - Chart Add tab
Issue: Currently, you can define a procedure to require a patient consent. Need the added ability to define specific circumstances requiring a patient consent.
Enhancement: Now you can define consent rules, and these rules are based on specific circumstances.

Setup;

1. Go to Maintenance window - EHR tab.
   There is a Required Consent Rules icon (new).

2. Click on the Required Consent Rules icon (new).
   axiUm displays the Required Consent Rules window (new).
Use this window to define consent form rules.

The consent rule titled Tx Consent Required is already provided for you. Use this consent rule to maintain the currently existing behavior; this rule requires any treatment-based consent form for all procedure codes that have been set up to require consent. You can change this consent rule.

You can create additional rules using the three options in the Rule Type drop-down field:

- **Any Treatment Based Consent**: Selecting this option indicates that specific provider types performing specific procedures require any treatment-based consent form.
- **Specific Consent**: Selecting this option indicates that specific provider types performing specific procedures require a specific consent form.
- **Custom Function**: Selecting this option indicates that specific patients (e.g. under 16 years old, has insurance, etc.) require a specific consent form. These rules are defined in custom functions.

The process of adding consents has been improved to help the user identify which consents are required and which treatments require the same consent:

- In the EHR window, clicking (Add Patient Consent) now displays two options:
  - **Add Patient Consent (new)**: This option, if selected, displays the Consent List window. This is the same behavior as clicking (Add Patient Consent) in previous versions.
  - **View Missing Required Consents option (new)**: This option, if selected, displays the Consent List window showing only those consents required for the patient or the selected treatment.
The Consent List window now has an **Only show required consents that are missing for this patient** checkbox, and selecting this checkbox displays only those consents that are required for the patient.

The EHR window’s Tx History tab now has a **View Missing Required Consents** right-click option (new). Selecting this option displays the Consent List window with the **Only show required consents that are missing for this treatment** checkbox (new) automatically displayed and selected.

Notes:
- You can now set up a planned treatment to require multiple consents to satisfy all rules. axiUm retains the consent indicator on the treatment record until you have satisfied all rules.
- If a provider belongs to a provider type that requires consent, the rule applies only if their user record indicates that they require a patient consent.
- Consents are only required for patients whose record indicates that a treatment-based consent is required.

---

**129508 - Ability to default Medications or Prescriptions option**

**Module:** EHR - Medications tab

**Issue:** Need the ability to default the Medications tab to select the Medications option or the Prescriptions option.
**Enhancement:** Now has the ability to default the Medications tab to select the Medications option or the Prescriptions option.

**Setup:**

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

2. Go to EHR section - Medications section - EHRMedMode(new).

3. In the Current Value field, enter one of the following options:
   
   - 0 - Medications: Selects the Medications option by default.
   - 1 - Prescriptions: Selects the Prescriptions option by default.

---

**Maintenance**

**130710 - Copying provider schedule can now copy same chairs**

*Module: Maintenance ~ Copy Provider Work Schedule window*
**Issue:** In the Copy Provider Work Schedule window (in Maintenance window - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - (Copy Schedules)), need the ability to copy the same chairs into the new work schedule.

**Enhancement:** Now when you copy a schedule to the same provider, axiUm asks, “This provider has specific chairs assigned. Do you want to keep the assigned chairs in the new schedule copied to?”

- Yes: axiUm assigns the same chairs.
- No: axiUm assigns chairs by availability.

Also, when you copy a schedule to a different provider (who has a default chair applicable to the work schedule), axiUm asks whether you want to use that chair.

---

**130733 - Ability to multi-select tooth condition records & resolve them**

**Module:** EHR - Tx History tab

**Issue:** Currently, you can resolve one condition at a time. Need the ability to resolve multiple condition records.

**Enhancement:** Now you can select multiple records from the list view and select the Resolve Condition right-click option.

You can also do this in the following windows:

- Tooth Notes/Conditions window
  In EHR window - odontogram - select tooth - right-click - Tooth Notes/Conditions

- Tooth Conditions window
  In EHR window - odontogram - select tooth - right-click - Tooth Notes/Conditions - Tooth Notes/Condition window - (Add a new Condition)

---

**Patient Card**

**129736 - Access to Template Age-specific Coverage window**

**Module:** Patient Info window ~ Linked Coverage Template window

**Issue:** Need the ability to look at the complete copayments for any given benefit plan without having to close it and go to the coverage template. Those who have no access to the Maintenance module cannot look to see if this is an age specific.

**Enhancement:** Now you can access the Age-specific Coverage window from the Linked Coverage Template window.

To do this:

1. Open the Patient Info window.
2. Click the Insurance tab.
3. Click the Coverage button.
axiUm displays the Linked Coverage Template window.

4. Click (Age-specific Coverage Details) (new).
axiUm displays the Template Age-specific Coverage Details window.

Previously this window was accessible only from the Maintenance window.

---

**Transactions**

130727 - Implemented new ADA 2012 claim form

*Module:* Transactions

*Issue:* The new ADA 2012 dental claim form became available July 1, 2012. Need axiUm to support this new claim format.

*Enhancement:* axiUm now supports ADA 2012 dental claim forms.
130155 - New Form Page Details window

**Module:** Power Admin ~ Form Page Details window (new)

**Issue:** In the EHR window’s Forms tab, need the ability to disable the Calculate button. Currently there is no Power Admin window that gives you the ability to do this.

**Enhancement:** There is now a Form Page Details window (new).

**Setup:**

1. Open the Power Admin window.

2. Go to Dialogs section - SHARED branch - New Form Page Details item.

3. Click on the New Form Page Details item.

   axiUm opens the Form Page Details window (new).
Use this window to set security on the toolbar items of any EPR form page, including the Calculate button. This security applies to all EPR forms that exist in axiUm (e.g. perio EPR forms).
**axiUm Release 5.11.05**

**Info Manager**

**132540 - Bank fields now available**

**Module:** Info Manager ~ Trx Allocations report, General Transactions report

**Issue:** Need the ability for reports to show the bank used to process payment. When you run a report showing refunds, it is helpful to see which bank the original payment took place.

**Enhancement:** Now has a Trx Bank field in the following reports:

Trx Allocations report

General Transactions report
Go to Info Manager - Billing tab - Trx Allocations category - right-click - Edit Report option - Report Definition window - Trx Charge / Apply To file - Tx. Bank field (new).
Enhancements

Modified: 30-Nov-12

Note: axiUm displays values for the Tx.Bank field only if refund records exist. To report on banks used for regular payments, you must add the Payment/Adjustment.Pmt.Bank Code to the report.

Transactions

132509 - Claim forms now display billing doctor first

Module: Transactions ~ Claim Form Codes window

Issue: If the first treatment shown on the claim form was performed by someone who is not a billing provider (e.g. a hygienist), axiUm uses the generic billing doctor information for the entire claim. Need axiUm to search for the first billing provider shown on the claim form and use this as the billing entity for the entire claim.

Enhancement: Now in the Claim Form Codes window (in Maintenance window - Insurance tab - Claim Form Codes icon,) if the Use Treating Dentists as Billing Entity checkbox is selected, axiUm uses the first billing provider found on the claim form as the billing entity for the entire claim. If there is no billing provider on the claim form, axiUm uses the non-billing provider (e.g. hygienist) shown on the first treatment.