axiUm

axiUm User Guide for Rolodex & Patient Card

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Table of Contents

About this Guide........................................................................................................ ix
Document Conventions.......................................................................................... ix
Document Icons..................................................................................................... x

Chapter 1: About Rolodex / Patient Card.............................................................. 1
  About the Rolodex Module.................................................................................. 1
  Opening the Rolodex Module........................................................................... 1
  The Rolodex Module Window.......................................................................... 3
  About the Patient Card Window..................................................................... 4
  Opening the Patient Card.............................................................................. 4
  The Patient Card Window............................................................................... 6

Chapter 2: Patients.............................................................................................. 9
  Searching in the Rolodex Module.................................................................. 10
  About the Patient Search Function............................................................... 10
  Searching Patient Files................................................................................... 11
  Creating Patient Records.............................................................................. 11
  Viewing Patient Records............................................................................... 14
  Viewing Patient Records on the Rolodex Module......................................... 15
  Viewing Patient Records on the Patient Card Window............................... 16
  Viewing Patient Records on the Patient Info Window................................ 16
  Copying Patient Records.............................................................................. 17
  Modifying Patient Records.......................................................................... 20
  Using Patient Photos...................................................................................... 21
    Uploading Patient Photos........................................................................... 22
    Deleting Patient Photos.............................................................................. 25
  Using Sticky Notes......................................................................................... 27
  Using Patient Contact Notes......................................................................... 27
  Using Ortho Programs.................................................................................... 27
    Opening the Ortho Patient Information Window........................................ 28
    The Ortho Patient Information Window.................................................... 28
    Adding Ortho Programs to Patient Records............................................... 29
Viewing Current Ortho Programs for Patients ......................................................... 31
Changing Ortho Programs for Patients................................................................. 31
Removing Ortho Programs from Patients........................................................... 34
De-activating & Activating Patient Records......................................................... 34
De-activating Patient Records ............................................................................. 35
Activating Patient Records.................................................................................. 37
Viewing Patient Record Activity History .............................................................. 38
Opening the Patient History Window................................................................. 38
The Patient History Window................................................................................ 39
Previewing Patient Record Activity History ....................................................... 39
Printing Patient Record Activity History............................................................ 41
Deleting Patient Records .................................................................................... 41
Using Sticky Notes ............................................................................................... 43
Creating Sticky Notes......................................................................................... 44
Viewing Sticky Notes.......................................................................................... 46
Editing Sticky Notes............................................................................................. 47
Deleting Sticky Notes.......................................................................................... 48
Using Patient Contact Notes ............................................................................. 50
Opening the Patient Contact Notes Window....................................................... 50
The Patient Contact Notes Window ................................................................... 51
Creating Patient Contact Notes.......................................................................... 52
Viewing Existing Patient Contact Notes ............................................................ 54
Viewing Deleted Patient Contact Notes .............................................................. 54
Editing Patient Contact Notes............................................................................ 55
Deleting Patient Contact Notes.......................................................................... 56
Previewing Patient Contact Notes...................................................................... 58
Printing Patient Contact Notes.......................................................................... 58
Viewing Patient Contact Notes Activity History .............................................. 59
Using Patient Labels ............................................................................................ 61
Opening the Labels Window .............................................................................. 62
The Labels Window.............................................................................................. 63
Creating Patient Labels....................................................................................... 63
Creating Patient Labels Containing New Text.................................................... 63
Creating Patient Labels Containing Data Fields............................................... 68
Editing Patient Labels......................................................................................... 73
Deleting Objects in the Report Editor Window.................................................... 73
Moving Objects in the Report Editor Window..................................................... 74
Using Word Templates for Patient Labels........................................................ 77
Using Label Templates....................................................................................... 77
Creating Label Templates................................................................................... 77
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modifying Label Templates</td>
<td>80</td>
</tr>
<tr>
<td>Deleting Label Templates</td>
<td>83</td>
</tr>
<tr>
<td>Printing Patient Labels</td>
<td>86</td>
</tr>
<tr>
<td>Printing Patient Records</td>
<td>87</td>
</tr>
<tr>
<td>Checking Patients In &amp; Out</td>
<td>88</td>
</tr>
<tr>
<td>Checking Patients In</td>
<td>88</td>
</tr>
<tr>
<td>Checking Patients Out</td>
<td>89</td>
</tr>
<tr>
<td>Using Patient Check In Form</td>
<td>91</td>
</tr>
<tr>
<td>Managing Patient Recalls</td>
<td>92</td>
</tr>
<tr>
<td>Opening the Patient Recalls Window</td>
<td>93</td>
</tr>
<tr>
<td>The Patient Recalls Window</td>
<td>94</td>
</tr>
<tr>
<td>Creating Patient Recall Templates</td>
<td>95</td>
</tr>
<tr>
<td>Modifying Patient Recall Templates</td>
<td>96</td>
</tr>
<tr>
<td>Deleting Patient Recall Templates</td>
<td>97</td>
</tr>
<tr>
<td>Viewing Patient Recall Activity History</td>
<td>98</td>
</tr>
<tr>
<td>Submitting Patient Needs Requests</td>
<td>99</td>
</tr>
<tr>
<td>Opening the Patient Needs Window</td>
<td>100</td>
</tr>
<tr>
<td>The Patient Needs Window</td>
<td>102</td>
</tr>
<tr>
<td>Creating Patient Needs</td>
<td>102</td>
</tr>
<tr>
<td>Creating Multiple Patient Needs</td>
<td>104</td>
</tr>
<tr>
<td>Modifying Patient Needs</td>
<td>106</td>
</tr>
<tr>
<td>Deleting Patient Needs</td>
<td>106</td>
</tr>
<tr>
<td>Restricting &amp; Freeing Access to Patient Records</td>
<td>107</td>
</tr>
<tr>
<td>Restricting Access to Patient Records</td>
<td>108</td>
</tr>
<tr>
<td>Freeing Access to Patient Records</td>
<td>111</td>
</tr>
<tr>
<td>Using Chart Locks</td>
<td>114</td>
</tr>
<tr>
<td>Applying Chart Locks</td>
<td>115</td>
</tr>
<tr>
<td>Removing Chart Locks</td>
<td>117</td>
</tr>
<tr>
<td>Using Patient Attachments</td>
<td>119</td>
</tr>
<tr>
<td>Scheduling Patients</td>
<td>119</td>
</tr>
<tr>
<td>Chapter 3: Guarantors</td>
<td>121</td>
</tr>
<tr>
<td>Opening the Guarantor Tab</td>
<td>122</td>
</tr>
<tr>
<td>Adding Guarantors</td>
<td>123</td>
</tr>
<tr>
<td>Creating Guarantors who are not Patients</td>
<td>123</td>
</tr>
<tr>
<td>Adding Guarantors who are Patients</td>
<td>125</td>
</tr>
<tr>
<td>Viewing Guarantor Information</td>
<td>127</td>
</tr>
<tr>
<td>Modifying Guarantor Information</td>
<td>128</td>
</tr>
<tr>
<td>Converting Guarantors to Patients</td>
<td>129</td>
</tr>
</tbody>
</table>
Viewing Guarantor Information Activity History .......................................................... 130
Deleting Guarantors ...................................................................................................... 131
Deleting Guarantor Information from Patient Records ............................................. 131
Deleting Extraneous Guarantor Records from axiUm ............................................ 132

Chapter 4: Employers .................................................................................................... 137
Opening the Employers Tab ...................................................................................... 138
Adding Employer Information .................................................................................. 138
Viewing Current Employer Information .................................................................. 141
Viewing Deleted Employer Information .................................................................. 142
Modifying Employer Information ............................................................................. 143
Previewing Employer Information ............................................................................ 144
Printing Employer Information .................................................................................. 145
Viewing Employer Information Activity History .................................................... 146
Deleting Employer Information ................................................................................ 147
Linking Employers to Insurance Benefit Plans ....................................................... 148

Chapter 5: Rolodex Utilities .......................................................................................... 151
Using the Patient Selection List ................................................................................ 151
Adding Patient Names to the Patient Selection List ................................................ 152
Holding Patient Names in the Patient Selection List ................................................ 154
Taking Patients off Hold from the Patient Selection List ........................................... 156
Removing Patient Names from the Patient Selection List ......................................... 157
Viewing Patient Selection List of Specific Providers ................................................ 161
Receiving Faculty Approvals .................................................................................... 162
Submitting Need Requests ....................................................................................... 163
Submitting Appointment Requests .......................................................................... 168
Submitting Chart Requests ...................................................................................... 170
Using the Dispensary Request .................................................................................. 173
Opening the Dispensary Request Window ............................................................... 174
The Dispensary Request Window .............................................................................. 175
Submitting a Dispensary Request .............................................................................. 175
Adding Items to the Dispensary Request .................................................................. 175
Deleting Items from the Dispensary Request ............................................................ 179
Using Dispensary Templates .................................................................................... 180
Opening the Dispensary Template List Window ....................................................... 180
Creating Dispensary Templates ................................................................................ 181
Modifying Dispensary Templates ............................................................................. 182
Opening the Edit Dispensary Template Window ...................................................... 183
Assigning Treatments to Providers ............................................................... 228
Unassigning Treatments from Providers ...................................................... 228

Chapter 6: Insurance & Benefit Plans .......................................................... 231
Opening the Insurance Tab ........................................................................... 231
Using Medical Insurance ............................................................................ 232
Adding Medical Insurance Information to Patient Records ...................... 232
  Automatically Linking Insurance Companies ........................................... 232
  Manually Selecting Insurance Companies ............................................... 232
Viewing Insurance Information on Patient Records .................................... 234
  Viewing General Insurance Information .................................................. 234
  Viewing Deleted General Insurance Information ...................................... 234
  Viewing Detailed Insurance Information ............................................... 235
  The Insurance Company Window ............................................................ 236
  Viewing Detailed Trojan Information ....................................................... 236
Modifying Insurance Information in Patient Records .................................. 237
Deleting Insurance Information from Patient Records .............................. 237
Previewing Insurance Information ............................................................. 238
Printing Insurance Information ................................................................. 239
Viewing Insurance Activity History ............................................................ 239
Using Billing Sequence ............................................................................... 241
  Prioritizing Billing Sequence .................................................................... 241
  Resetting Billing Sequence ....................................................................... 242
Linking Insurance Companies to Benefit Plans ......................................... 243
Using Benefit Plans ................................................................................... 244
Viewing Patients’ Current Benefit Plan Coverages ..................................... 244
  Opening Current Benefit Plan Coverages .................................................. 244
  The Benefit Plan Coverage Window ......................................................... 245
  The Linked Coverage Template Window ................................................ 246
Adjusting Benefit Plan Coverage Details .................................................... 246
  Creating Additional Benefit Plan Coverage Details ................................. 247
  Modifying Benefit Plan Coverage Details ............................................... 249
    Modifying Benefit Plan Coverage Details Using the Insurance Tab ......... 249
    Modifying Benefit Plan Coverage Details Using the Benefit Plan Coverage Window .... 250
  Deleting Benefit Plan Coverage Details ................................................ 252
  Previewing Benefit Plan Coverage Details .............................................. 254
  Printing Benefit Plan Coverage Details .................................................. 255
  Copying Benefit Plan Coverage Details .................................................. 256
Using Benefit Plan Templates .................................................................. 257
  Opening the Coverage Template List Window ......................................... 258
Extending Benefit Plans to Dependents ...................................................... 261
    Applying Multiple Coverages to Multiple Patients ...................................... 261
    Applying Cross-Coverage Benefit Plans Between Two Adults .................... 261
    Applying Dual Coverage Benefit Plans From Two Adults to One Child .......... 266
    Applying Dual Coverage Benefit Plans From Two Adults to Two Children ...... 271
Viewing Cross-Coverage Benefit Plan Information ...................................... 272
The Dependents Window ............................................................................. 273
Editing Cross-Coverage Benefit Plan Information ........................................ 274
Viewing Cross-Coverage Benefit Plan Activity History ................................. 274
About this Guide

This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Rolodex and Patient Card window.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

Document Conventions

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

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
# Document Icons

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
The Rolodex module is the main window to the patient list. Almost all interaction with patient records start here. A major part of the Rolodex module is the Patient Card window.

This chapter covers the following topics:

- About the Rolodex module
- About the Patient Card window

Read the following sections to familiarize yourself with the features of the Rolodex module and the Patient Card window.

1 About the Rolodex Module

A user can add a new patient, search for an existing patient or delete an existing patient from axiUm’s Rolodex. There are also additional capabilities in the Rolodex to make chart requests, appointment requests, dispensary requests, patient needs requests, and accessing the treatment approval and student evaluation windows. These procedures will be described later on.

1.1 Opening the Rolodex Module

There are different methods to access the Rolodex module:

- Icon
- Actions menu
- Desktop

The following instructions describe these methods.
To open the Rolodex module using the icon:

Click  (Rolodex).

To open the Rolodex module using the Actions menu:

From the Actions menu, click Rolodex.

To open the Rolodex module using the Desktop:

From the Desktop, click  (Rolodex).

The next section describes the Rolodex module window.
1.2 The Rolodex Module Window

The Rolodex window is made up of the following major areas. This is how it may look when you open it for the first time.

When you highlight a patient in the patient list it displays their information in the patient information section. When you select the patient from the list it moves their name to the selected list and allows the user to navigate to other areas of the software with the selected patient's record.
2 About the Patient Card Window

2.1 Opening the Patient Card

The Patient Card displays read-only information about the patient. The Patient Card can be accessed through the following modules:

- Rolodex
- Patient Care
- Scheduler
- Transactions
- Ortho
- Patient Assignments
- Info Manager

You can also access the Patient Card:

- In the Perio EPR Forms window
- Clicking on the patient's name in the taskbar

Because the Rolodex module is accessible to almost all users, we will access the Patient Card from the Rolodex module. Users with access to the modules mentioned above can access the Patient Card through there.

The following instruction shows how to open the patient card using Jane Doe as our example.

▼To open the Patient Card through the Rolodex module:

1. Search for a patient.

   For instructions on searching patients, see Searching Patient Files on page 11.

2. From the patient list (i.e. search list) or the patient selection list, highlight the patient record.

   For instructions on searching for patient records, see Searching in the Rolodex Module on page 10.

   For instructions on adding patients to the patient selection list, see Adding Patient Names to the Patient Selection List on page 152.
3. Highlight a patient record.

4. Click (Patient Card).

axiUm displays the Patient Card for the selected patient. For information on the Patient Card, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Card Window on page 60.

The next section describes the Patient Card window.
2.2 The Patient Card Window

The Patient Card window is made up of the following major areas. This is how it may look when you open it for the first time.
The following table lists the interface elements and their descriptions:

<table>
<thead>
<tr>
<th>Interface Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient name</td>
<td>This is the patient name as entered in the system.</td>
</tr>
<tr>
<td>Chart in/out, location, patient type</td>
<td>In the top area of the card, beside the Patient name, there is information regarding the current location of the patient's chart. When using the Chart Tracking module of axiUm, this information will often be OUT and the name of the user who has taken the chart and the location where he/she has taken it will also be shown here. Otherwise the card will show that the chart is IN the chart room, or other designated storage area. For further details, see the axiUm User Guide for Chart Tracking module.</td>
</tr>
<tr>
<td>Patient Card tools</td>
<td>The user will also notice icons in the top area of this window. Their functions will be explained later in this section.</td>
</tr>
<tr>
<td>Personal information</td>
<td>Starting in the top left box, the Patient Card displays the Patient's name, birth date and address. In the middle top box, the Patient Card displays the telephone numbers where the patient may be reached and the preferred contact place and time. In the third box, the patient's chart number, status, first two assigned providers, ID # and access status are presented. Note that there is no limit to the number of assigned providers, but that this window displays only two.</td>
</tr>
<tr>
<td>Patient photo</td>
<td>You can upload a photo to display here.</td>
</tr>
<tr>
<td>Insurance information</td>
<td>The second row of boxes, include the patient's primary and secondary insurance policies, and his/her physician, emergency contact information, and manager assigned to this patient.</td>
</tr>
<tr>
<td>Emergency contact</td>
<td>The patient's emergency contact and physician information.</td>
</tr>
<tr>
<td>Alerts &amp; codes</td>
<td>The third row of boxes displays the patient's Alert, Office and Custom Codes. To get the full description of an Alert or Office Code, the user may simply move the mouse pointer over the code. This action will pop-up the detailed description of the selected Alert or Office Code. It also indicates the date of the next appointment and the next recall.</td>
</tr>
<tr>
<td>Aged accounts receivables summary</td>
<td>The patient's aged A/R balances and payment plan.</td>
</tr>
<tr>
<td>Appointment tools &amp; history</td>
<td>The patient's appointments are listed here. If the patient is receiving ortho-type treatments, the ortho stage is indicated in the Code column. Right-click to display additional options: Show History, Planned Treatments, and Notes. For more information on these windows, refer to the axiUm User Guide for Scheduler module.</td>
</tr>
</tbody>
</table>

You have now familiarized yourself with the general window elements of the Rolodex module and the Patient Card window.

The rest of this axiUm User Guide provides information and instructions on how to use the Rolodex module and the Patient Card as part of your daily tasks.
This chapter covers the utilities in the Rolodex / Patient Card module that pertains to the selected patient record. There are other utilities in the Rolodex / Patient Card module, but may not be directly related to the selected patient record. These are covered in *Rolodex Utilities* on page 151.

This chapter covers the following topics:

- Searching in the Rolodex module
- Creating patient records
- Viewing patient records
- Copying patient records
- Modifying patient records
- Viewing patient record activity history
- Deleting patient records
- Using sticky notes
- Using patient contact notes
- Using patient labels
- Printing patient records
- Checking patients in and out
- Using Patient Check In form
- Recalling patients
- Submitting patient needs requests
- Restricting and freeing access to patient records
- Using chart locks
- Using patient attachments
- Scheduling patients

At the end of this chapter you will be familiar with these tasks.
1 Searching in the Rolodex Module

This section covers the following topics:

- About the patient search function
- Searching patient files

1.1 About the Patient Search Function

The search function for searching patients (e.g. Rolodex module’s search field) behaves slightly differently than the search functions you will find in other parts of axiUm.

The following table lists the possible search criteria you can enter and the results you will see.

<table>
<thead>
<tr>
<th>If you enter...</th>
<th>axiUm will find...</th>
</tr>
</thead>
<tbody>
<tr>
<td>ma</td>
<td>All patients’ names beginning with Ma.</td>
</tr>
<tr>
<td></td>
<td>For example, Mathers, Matte, and Mallan.</td>
</tr>
<tr>
<td>,Ti</td>
<td>All patients with first names beginning with Ti.</td>
</tr>
<tr>
<td></td>
<td>For example, Tina, Timothy, and Tira.</td>
</tr>
<tr>
<td>sm,j</td>
<td>All patients’s last names beginning with Sm and the first name beginning with J.</td>
</tr>
<tr>
<td></td>
<td>For example, Joe Smith, Jack Smithe, and Jane Smithers.</td>
</tr>
<tr>
<td>_</td>
<td>All records. This is not recommended on large databases.</td>
</tr>
<tr>
<td>02/28/74</td>
<td>axiUm searches only perfect matches, it does not display partial matches. Entering 1973 will not display all patients born in that year.</td>
</tr>
</tbody>
</table>

Some search criteria require you to click on the corresponding column headings. In the following example, we will search for Jane Doe by her phone number.

▼ To search based on a telephone number:

1. In the search field, enter the phone number. For this example, we will enter 524-17.

   You can enter either whole or partial numbers. Use 555-1234 format. Do not use area codes. Entering 524-1 retrieves any telephone number starting with this sequence.

2. Click on the Home Phone column heading.
Creating Patient Records

axiUm displays the search results in the patient list.

<table>
<thead>
<tr>
<th>Name</th>
<th>Last</th>
<th>First</th>
<th>Phone</th>
<th>BirthDate</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe. Jane</td>
<td>Jane</td>
<td>Doe</td>
<td>234</td>
<td>20/1/79</td>
<td>846</td>
</tr>
</tbody>
</table>

💡 You can base your search criteria on any of the column headings. Just remember to click the column heading instead of pressing the Enter key.

Now that you know how to use the Rolodex module’s search function, you can use this to search for patient files.

1.2 Searching Patient Files

In the following example, we will search for Jane Doe by her last name.

▼ To search for a patient file:

1. In the search field, enter a search criteria. For this example, enter doe.
2. Press ENTER.

Patients matching the search criteria will appear in the patient list.

You have now successfully found a patient file in axiUm.

2 Creating Patient Records

One of the first tasks you must complete when you set up axiUm is to create patient files. For this example, we will create a patient named Jane Doe.
To create a patient file:

1. Click (Add Patient).

axiUm displays the Patient Info - Add Patient window.

2. Enter the system-required fields and options provided.

3. Click Save.
axiUm saves the information. The Patient Info - Add Patient window is now called the Patient Info - Doe, Jane window and displays additional tabs. You can complete the tabs at a later time.

4. Click **Close**.

   axiUm closes the Patient Info window and displays a message box.

5. Click **Yes**.

   axiUm returns to the Rolodex module. The new patient is displayed in the patient information, patient list, patient selection list, and the taskbar. The taskbar also indicates the patient’s gender and age.

You have now successfully added a patient record into axiUm.

Selected checkboxes next to the patient’s name in the patient list indicate active patients.

Adding the patient’s name into the patient selection list lets you find frequently used files quickly. For more information about the patient selection list, see *Using the Patient Selection*
List on page 151.

3 Viewing Patient Records

Patient records can be viewed in different windows, each one giving you access to different levels of detail.

You can view patient records through the following windows, listed from the least amount of detail to the greatest amount of detail:

- Rolodex module
- Patient Card window
- Patient Info window

The following sections show how to view patient information in these windows.
3.1 Viewing Patient Records on the Rolodex Module

The Rolodex module’s patient information section gives you a general overview of the patient. The information is read-only.

The following instruction shows how to view patient records on the Rolodex module using our Jane Doe example.

▼To view a patient record on the Rolodex module:

1. Search for a patient.

   For instructions on searching patients, see Searching in the Rolodex Module on page 10.

   axiUm displays a brief demographic overview of the patient in the patient information section.

2. From the patient list, double-click on the patient's name.

   Alternatively, right-click to display a list of options and go to Select.
The patient’s name appears on the patient selection list, and also in the taskbar next to the patient’s chart number.

You have now successfully displayed the patient record on the Rolodex module.

### 3.2 Viewing Patient Records on the Patient Card Window

For instructions on viewing patient records on the Patient Card window, see *Opening the Patient Card* on page 4.

### 3.3 Viewing Patient Records on the Patient Info Window

The Patient Info window gives you the greatest amount of information and detail about the patient. This is also the only place where you can modify the patient’s information.

▼To view a patient record on the Patient Info window:

1. Open the **Patient Card** window.

   For instructions on opening the Patient Card window, see *Opening the Patient Card* on page 4.

2. Double-click anywhere on the Patient Card.

   When you double-click in a section, axiUm opens the Patient Info window to the tab displaying the associated information. For a description of these sections see *The Patient Card Window* on page 6.
axiUm displays the Patient Info window. For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window on page 75.

You have now successfully displayed the patient record on the Patient Info window.

4 Copying Patient Records

Once you have a patient file, you can copy them to create new patient records. This is often done when creating additional patient records for family members. For this example, we will copy Jane Doe’s file and create a file for her husband John Doe.

axiUm automatically transfers common patient information. When you copy files, it copies the following information from the original patient record to the new patient record:

- Last name
- Address
- Home phone number

It may also ask if you would like to copy the:

- Emergency contact
- Insurance policy (including employer information)
To copy a patient file:

1. Select a patient.

   For instructions on selecting patients, see Viewing Patient Records on page 14.

2. Click (Patient Copy).

   axiUm displays a message box.

3. Click Yes.

   If the original patient is a policy holder, axiUm displays a message box.

   ![Select Policies dialog box]

   If the original patient is a policy holder, their policies will be copied over to the new patient. If the original patient is not a policy holder, the new patient will become their dependent. In our example, the original patient has a policy. We will copy that policy to the new patient record.

4. Highlight the items. In our example, we have only one item to highlight.

5. Click OK.

   axiUm copies the insurance policy from the original patient to the new patient.
If the original patient has emergency contact information, axiUm displays a message box.

6. Click Yes.

axiUm displays the Patient Info - Doe, Copy of Jane.

7. Enter the fields and options provided, similar to how you would create a new patient file.

8. Click Save.

axiUm saves the information.

9. Click Close.

axiUm closes the Patient Info window and displays a message box.
10. Click Yes.

axiUm returns to the Rolodex module. The new patient is displayed.

You have now successfully copied a patient file to create a new patient.

5 Modifying Patient Records

This section covers the following topics:

- Using patient photos
- Using sticky notes
- Using patient contact notes
- Using ortho programs
- De-activating and activating patient records

Patient records are frequently updated to keep them current. In our example, we will update John Doe's patient record by changing his address.

▼To modify a patient record:

1. Open the Patient Card window.

   For instructions on opening the Patient Card window, see Opening the Patient Card on page 4.

axiUm displays the Patient Info window. For information on the Patient Info window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window on page 75.

3. Click on the Personal tab.

4. Make changes to the fields provided. For our example, we will do the following to the Home Address section:
   - Address: 1019 Graham Dr.
   - City: 100 Palms
   - Zip: 92274

5. Click Save.

axiUm saves your entries. Based on the address you entered, axiUm also automatically selects and displays the State and Country fields.

You have now successfully modified a patient record. The rest of this section will describe how to modify specific types of information.

Patient information is divided between six tabs. You can click on any tab to update the information in that tab.

### 5.1 Using Patient Photos

This section covers the following topics:

- Uploading patient photos
- Deleting patient photos
Uploading Patient Photos

▼To upload a patient photo:

1. Open the Patient Card window.

   For instructions on accessing the Patient Card, see Opening the Patient Card on page 4.

2. Double-click on the patient photo area.

   This displays the Patient Info window’s Clinical tab. For information on the Patient Info window’s Clinical tab, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window - Clinical Tab on page 89.

3. Click on Patient has Picture checkbox.

4. Click Browse....

   Alternatively, double-click on the patient photo area.
axiUm displays the Select Image window.

5. Browse to the image file and select it.

6. Click **Open**.

axiUm closes the Select Image screen and displays the image on the Patient Info window.

7. Click **Save**.

axiUm saves the uploaded image.

8. Click **Close**.
axiUm closes the Patient Info window and returns to the Patient Card window. The Patient Card window displays the patient photo.

9. Click (Close).

axiUm closes the Patient Card window and returns to the Rolodex module. The Rolodex module also displays the patient photo.

You have now successfully uploaded a patient’s photo in their patient record.

💡 If you rename the source file or delete it, this will not affect the photo display in axiUm.
Deleting Patient Photos

▼To delete a patient photo:

1. Open the **Patient Card** window.

   For instructions on accessing the Patient Card, see *Opening the Patient Card* on page 4.

2. Double-click on the patient photo area.

   This displays the Patient Info window. The Clinical tab is selected. For information on the Patient Info window’s Clinical tab, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Patient Info Window - Clinical Tab* on page 89.

3. Deselect the **Patient has Picture** checkbox.

4. Click **Save**.
axiUm deletes the image from the Patient Info window.

![Patient Info Window](image1)

5. **Click Close.**

axiUm closes the Patient Info window and returns to the Patient Card window. The Patient Card window no longer displays the patient photo.

![Patient Card Window](image2)

6. **Click** (Close).
axiUm closes the Patient Card window and returns to the Rolodex module. The Rolodex module also deletes the patient photo.

You have now successfully deleted a patient’s photo from their patient record.

5.2 Using Sticky Notes

For information and instructions on using sticky notes, see Using Sticky Notes on page 43.

5.3 Using Patient Contact Notes

For information and instructions on using patient contact notes, see Using Patient Contact Notes on page 50.

5.4 Using Ortho Programs

This section covers the following topics:

- Opening the Ortho Patient Information window
- The Ortho Patient Information window
- Adding ortho programs to patient records
- Viewing current ortho programs for patients
- Changing ortho programs for patients
- Removing ortho programs from patients
Opening the Ortho Patient Information Window

There are different methods to open the Ortho Patient Information window:

- Patient Card window
- Patient Info window

This section covers the different methods.

▼To open the Ortho Patient Information window using the Patient Card window:

1. Open the Patient Card window.
   
   For instructions on accessing the Patient Card, see Opening the Patient Card on page 4.

2. Click (Ortho Information).
   
   axiUm displays the Ortho Patient Information window.

▼To open the Ortho Patient Information window using the Patient Info window:

1. Open the Patient Info window.
   
   For instructions on accessing the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click the Codes tab.
3. Click Ortho....
   
   axiUm displays the Ortho Patient Information window.

The next section describes the Ortho Patient Information window.

The Ortho Patient Information Window

This is how the Ortho Patient Information window may look when you open it.
Use this window for:

- Adding ortho programs to patient records
- Viewing current ortho programs for patients
- Changing ortho programs for patients
- Removing ortho programs from patients

For information on the Ortho Patient Information window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Ortho Patient Information Window on page 56.

The following sections will explain the procedures for these tasks.

Adding Ortho Programs to Patient Records

▼ To add an ortho program to a patient record:

1. Open the Ortho Patient Information window.

   For instructions opening the Ortho Patient Information window, see Opening the Ortho Patient Information Window on page 28.

2. Select the Is Ortho Patient checkbox.

   axiUm enables the Ortho Set field.

3. Go to the Ortho Set: field and click (ellipsis).
axiUm displays the Set Codes window. For information on the Set Codes window, refer to the axiUm Reference Manual for Maintenance and see *Set Codes Window* on page 571.

4. From the list view, highlight an ortho program code for the ortho program the patient is to be placed on. For our example, we will select **CONSLT, Consultation**.

axiUm displays the details of the selected program in the list view.

5. Click **(Close)**.
axiUm saves your selection, closes the Set Codes window, and returns to the Ortho Patient Information.

axiUm displays the selected ortho program in the Ortho Set field.

6. Click OK.

axiUm saves the ortho program on the patient record, closes the Ortho Patient Information window, and returns to the Patient Card window.

You have now successfully assigned an ortho program to this patient record.

The patient’s ortho program is accessible in the Ortho module. For more information, see the axiUm User Guide for the Ortho module.

**Viewing Current Ortho Programs for Patients**

**▼To view the current ortho program for a patient:**

Open the **Ortho Patient Information** window.

For instructions opening the Ortho Patient Information window, see *Opening the Ortho Patient Information Window* on page 28.

**Changing Ortho Programs for Patients**

**▼To change the ortho program for a patient:**

1. Open the **Ortho Patient Information** window.

For instructions opening the Ortho Patient Information window, see *Opening the Ortho Patient Information Window* on page 28.
axiUm displays the current ortho program.

2. Go to the **Ortho Set** field and click (ellipsis).

   axiUm displays the Set Codes window. For information on the Set Codes window, refer to the axiUm Reference Manual for Maintenance and see *Set Codes Window* on page 571.

3. From the list view, select a different ortho program code. For our example, we will select **RECS**, Diagnostic Records.
axiUm displays the details of the selected program in the list view.

4. Click (Close).

axiUm saves your selection, closes the Set Code window, and returns to the Ortho Patient Information.

axiUm displays the updated ortho program in the Ortho Set field.

5. Click OK.

axiUm saves the updated ortho program on the patient record, closes the Ortho Patient Information window, and returns to the Patient Card window.

You have now successfully changed an ortho program in a patient record.
Removing Ortho Programs from Patients

▼To remove an ortho program from a patient record:

1. Open the Ortho Patient Information window.

   For instructions opening the Ortho Patient Information window, see Opening the Ortho Patient Information Window on page 28.

2. Go to the Ortho Set field and highlight the contents of the field.

   ![Ortho Patient Information Window](image)

3. Press DELETE.

   ![Ortho Patient Information Window](image)

4. Click OK.

   axiUm removes the ortho program from the patient record, closes the Ortho Patient Information window, and returns to the previous window.

   You have now successfully removed an ortho program from a patient record.

5.5 De-activating & Activating Patient Records

   axiUm automatically activates all patients when their record is created. You can de-activate patient records anytime.
Active Patient Records

Selected checkboxes in the patient list indicate active patient records.

Active patient records are those patients who are currently using the institution’s dental services, and you can access their records to perform tasks (e.g. you can book appointments).

Inactive Patient Records

Empty checkboxes indicate inactive patient records.

Inactive patient records are those patients who are no longer using the institution’s dental services, or those who are screening patients. De-activated patient records still show up in the Rolodex. This is because axiUm retains de-activated patient records, unlike deleted patient records that are permanently disposed from the database. You can access de-activated patient records but you cannot perform tasks (e.g. you cannot book appointments, access charting, or enter treatments).

You may also de-activate a patient’s record once they have had their work completed in the clinic, and re-activate them when more treatment is needed.

De-activating Patient Records

\[\text{To de-activate patient records:}\]

1. Open the Patient Info window.

For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.
2. Click on the **Personal** tab.

3. Deselect the **Patient** checkbox.

4. Click **Save**.

   axiUm saves your changes.

5. Click **Close**.

   axiUm applies your changes, closes the Patient Info window, and returns to the Patient Card window.

You have now successfully de-activated a patient record.

When you search for the patient record, the Rolodex module still displays the de-activated patient name in the patient list. The deselected checkbox indicates that the patient record is inactive.

You cannot manually select the checkbox next to the patient name to make a patient record active. You must follow the procedure.

You can move inactive patient names to the patient selection list. For instructions on moving patient names to the patient selection list, see *Adding Patient Names to the Patient Selection List* on page 152.
Modifying Patient Records

Activating Patient Records

▼ To activate patient records:

1. Open the Patient Info window.

   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Personal tab.

3. Select the Patient checkbox.

4. Click Save.

   axiUm saves your changes.

5. Click Close.

   axiUm applies your changes, closes the Patient Info window, and returns to the Patient Card window.

You have now successfully activated a patient record.

When you search for the patient record in the Rolodex module, the selected checkbox indicates that the patient record is active.

You cannot manually deselect the checkbox next to the patient name to make a patient record inactive. You must follow the procedure.
### 6 Viewing Patient Record Activity History

axiUm retains a historic record of all changes made to each patient record. The historic records contain:

- Type of action (added or updated)
- Areas of the patient record affected by the change
- User name of the person who made the changes
- Date and time of change
- Ability to preview and print each activity’s history

This section covers the following topics:

- Opening the Patient History window
- The Patient History window
- Previewing patient record activity history
- Printing patient record activity history

### 6.1 Opening the Patient History Window

![To open the Patient History window:]

1. Open the **Patient Info** window.
   
   For instructions on accessing the Patient Info window, see *Viewing Patient Records on the Patient Info Window* on page 16.

2. Click on one of the following tabs:
   - Personal
   - Codes
   - Clinical

3. Click **History**.

   axiUm displays the Patient History window.

The next section describes the Patient History window.
6.2 The Patient History Window

This is how the Patient History Window may look when you open it.

Use this window for:

- Previewing patient record activity history
- Printing patient record activity history

The following sections will explain the procedures for these tasks.

6.3 Previewing Patient Record Activity History

For our example, we will preview the activity history for Jane Doe’s patient record.

\[\text{To preview patient history activity:}\]

1. Open the Patient History window.

For instructions on opening the Patient History window, see Viewing Patient Record Activity History on page 38.
2. From the list view, highlight an item. For our example, we will select the sixth item.

3. Click (Preview Report).

axiUm displays the Patient History report. This report displays all personal, code, and clinical information in the patient record. In our example, Jane Doe’s patient record indicates that a user changed the patient status.

You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.

4. Click (Close).

axiUm closes the Patient History report and returns to the Patient Info window.

You have now successfully previewed the personal, code, and clinical activity history in a patient record.
6.4 Printing Patient Record Activity History

To print patient activity history report:

1. Open the Patient History window.
   For instructions on opening the Patient History window, see Viewing Patient Record Activity History on page 38.

2. Click (Print Report).
   axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.
   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.
   axiUm prints the report to the selected printer.

   You have now successfully printed the contact notes on a patient record.

7 Deleting Patient Records

You cannot delete patient records if the patient:

- is a guarantor for another patient
- has a future appointment
has a balance owing on their previous treatments

When you delete a patient record, you are permanently disposing it from the axiUm database.

To delete a patient record:

1. Go to the patient selection list.

   Alternatively, go to the patient list.

2. Highlight a patient's name. For our example, we will select John Doe.

3. Click (Delete Patient).

   axiUm displays a message box.

4. Click Yes.
axiUm deletes the patient’s name from the Rolodex module. The patient is no longer displayed in the patient information, patient list, patient selection list, or the taskbar.

You have now successfully deleted a patient record.

8 Using Sticky Notes

Sticky notes are for internal purposes and are used to pass information about a record between the faculty members.

Sticky notes can be manually created by staff or automatically displayed by axiUm. You may want to manually create a sticky note when you want to leave a specific message about a patient for other staff members to read. axiUm may generate a sticky note automatically when a patient has indicated in their Exan HealthAccess website account that their demographic information is not current.

Sticky notes made in one module are independent of those made in other modules. For example, the sticky notes created in the Patient Card cannot be viewed in the sticky notes of the Rolodex module.
This section covers the following topics:

- Creating sticky notes
- Viewing sticky notes
- Editing sticky notes
- Deleting sticky notes

8.1 Creating Sticky Notes

For our example, we will access the Sticky Notes utility from the Patient Card.

To create a sticky note:

1. Open the Patient Card window.

   For instructions on accessing the Patient Card, see Opening the Patient Card on page 4.

2. Click (Add Sticky Notes).

   axiUm displays the Stickies window.

3. Enter a note. For our example, enter This patient left behind her jacket last visit.

   At this time you can set up sticky note options.
To set up sticky note options:

3.1. Click (Note Options).

axiUm displays the Note Options window.

3.2. Enter the system-required fields and options provided.

3.3. Click OK.

axiUm saves the entries and closes the Note Options window.

4. Click and hold the mouse on the fold of the notepad.

The pointer turns into a notepad icon.

5. Drag the notepad icon onto the current window. For our example, we will drag the icon onto the Patient Card.
axiUm displays the sticky note indicator in the selected screen. In our example, this is the Patient Card. The sticky note indicator displays the number 3 on it, indicating that this patient has three sticky notes on their file.

For our example, we will access the Sticky Notes utility from the Patient Card window.

▼To view a sticky note:

1. Open the Patient Card window.

   For instructions on opening the Patient Card window, see Opening the Patient Card on page 4.

2. Click on the sticky note indicator.
axiUm displays the Edit Notes window.

3. When you are done reading, click **Save**.

axiUm closes the Edit Notes window.

You have now successfully viewed a sticky note in the patient record.

### 8.3 Editing Sticky Notes

For our example, we will access the Sticky Notes utility from the Patient Card window.

▼ **To edit a sticky note:**

1. Follow the instructions for viewing a sticky note.
2. In the **Edit Notes** window, make changes to the message.

    *At this time you can modify your sticky note options.*
To set up sticky note options:

2.1. Click on Options >.

axiUm expands the Edit Notes window to display more details.

2.2. Edit the fields and selections provided.

2.3. Click Save.

2.4. Click on << Options to hide the details section.

3. Click Save.

axiUm saves the entries.

4. Click (Close).

axiUm closes the Edit Notes window.

You have now successfully edited a sticky note in a patient record.

8.4 Deleting Sticky Notes

For our example, we will access the Sticky Notes utility from the Patient Card window.
To delete a sticky note:

1. Open the Patient Card window.
   For instructions on opening the Patient Card window, see Opening the Patient Card on page 4.

2. Click on the sticky note indicator.

   axiUm displays the Edit Notes window.

3. When you are done reading, click Remove.

   axiUm displays a message box.

4. Click Yes.
axiUm closes the Edit Notes window. The sticky note indicator is removed from the Patient Card.

You have now successfully deleted a sticky note from a patient record.

9 Using Patient Contact Notes

The Patient Contact Notes utility can be accessed from the:

- Patient Card window
- Patient Care module
- Transactions module

This section covers the following topics:

- Opening the Patient Contact Notes window
- The Patient Contact Notes window
- Creating patient contact notes
- Viewing existing patient contact notes
- Viewing deleted patient contact notes
- Editing patient contact notes
- Deleting patient contact notes
- Previewing patient contact notes
- Printing patient contact notes
- Viewing patient contact notes activity history

9.1 Opening the Patient Contact Notes Window

For our example, we will access the Patient Contact Notes utility from the Patient Card window.
To open the Contact Notes window:

1. Open the **Patient Card** window.
   
   For instructions on opening the Patient Card window, see *Opening the Patient Card* on page 4.

2. Click **(Contact Notes)**.

   axiUm displays the Patient Contact Notes window.

The next section describes the Contact Notes window.

### 9.2 The Patient Contact Notes Window

This is how the Contact Notes window may look when you open it.

Use this window for:

- Creating patient contact notes
- Viewing patient contact notes
- Editing patient contact notes
- Deleting patient contact notes
- Previewing patient contact notes
- Printing patient contact notes
- Viewing patient contact notes activity history

The following sections will explain the procedures for these tasks.
9.3 Creating Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

▼To create a patient contact note:

1. Open the Contact Notes window.

   For instructions on opening the Contact Notes window, see Opening the Patient Contact Notes Window on page 50.

2. Go to the Code field and click  (ellipsis).

   axiUm displays the Contact Note Codes window.

   For information on the Contact Note Codes window, refer to the axiUm Reference Manual for Maintenance and see Contact Note Codes Window on page 580.

3. From the list view, highlight an item. For our example we will select code DISC.

   Pt's home # is disc and her mother's number is not working.
axiUm displays the details of the highlighted item in the Code field and Text textbox.

4. Click (Close).

Alternatively, double-click the item.

axiUm saves your selection, closes the Contact Note Codes window, and returns to the Patient Contact Notes window.

The selected code and details are displayed in the Code field and Note textbook.

5. If you want to change the text, go to the Note text field and enter the changes.

6. Click (Add a new Record).
axiUm adds the item to the list view.

7. Click \( \times \) (Close).

axiUm closes the Patient Contact Notes window and returns to the previous window.

You have now successfully created a patient contact note for the patient record.

9.4 Viewing Existing Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

\[ \text{\textbf{\textcolor{red}{\textbf{\textbullet}} To view a patient contact note:}} \]

Open the Contact Notes window.

For instructions on opening the Contact Notes window, see \textit{Opening the Patient Contact Notes Window} on page 50.

9.5 Viewing Deleted Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.
To view a deleted patient contact note:

1. Open the Contact Notes window.

   For instructions on opening the Contact Notes window, see Opening the Patient Contact Notes Window on page 50.

2. Select the Show Deleted checkbox.

   axiUm displays the deleted contact notes in gray.

   ![Deleted contact notes in gray.](image)

You have now successfully viewed deleted contact notes in a patient record.

9.6 Editing Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

To edit a patient contact note:

1. Open the Contact Notes window.

   For instructions on opening the Contact Notes window, see Opening the Patient Contact Notes Window on page 50.
2. In the **Note** text field, enter the changes. For our example, we will add a new sentence
   *Try her father's number.*

3. Click ![Modify Record](image)
   axiUm saves the changes.

4. Click ![Close](image)
   axiUm closes the Patient Contact Notes window and returns to the previous window.

You have now successfully edited a patient contact note in the patient record.

### 9.7 Deleting Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

**To delete a patient contact note:**

1. Open the **Contact Notes** window.

   For instructions on opening the Contact Notes window, see *Opening the Patient Contact Notes Window* on page 50.
2. From the list view, select an item. For our example, we will select the note Pt's home # is disc and her mother's number is not working. Try her father's number.

3. Click (Delete Record).

axiUm displays a message box.

4. Click Yes.

axiUm deletes the item from the list view.

You have now successfully deleted a patient contact note from the patient record.
To view deleted contact notes, see *Viewing Deleted Patient Contact Notes* on page 54.

### 9.8 Previewing Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

**To preview patient contact notes:**

1. Open the **Contact Notes** window.
   
   For instructions on opening the Contact Notes window, see *Opening the Patient Contact Notes Window* on page 50.

2. Click (Preview Report).

   axiUm displays the Patient Contact Notes report. This report displays all notes in the patient record.

3. Click (Close).

   axiUm closes the Patient Contact Notes report and returns to the previous window.

You have now successfully previewed the contact notes in a patient record.

### 9.9 Printing Patient Contact Notes

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

---

You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.
To print patient contact notes:

1. Open the **Contact Notes** window.

   For instructions on opening the Contact Notes window, see *Opening the Patient Contact Notes Window* on page 50.

2. Click **Print Report**.

   axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

   *You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.*

4. Click **Select**.

   axiUm prints the report to the selected printer.

   You have now successfully printed the contact notes in a patient record.

### 9.10 Viewing Patient Contact Notes Activity History

For our example, we will access the Patient Contact Notes utility from the Patient Card window.

axiUm retains a cumulative record of all changes made to each contact note in a patient record. The historic records contain:

- Date and time of change
- Entire content of the contact note at the time it was saved
- User name of the person who made the changes
- Type of action
To view activity history of patient contact notes:

1. Open the Contact Notes window.

   For instructions on opening the Contact Notes window, see *Opening the Patient Contact Notes Window on page 50.*

2. From the list view, select an item. For our example, we will select the note *Pt's home # is disc and her mother's number is not working. Try her father's number.*

3. Click **(Show History).**

   axiUm displays the Patient Contact Notes History window.
4. Click on an item to view the details in the **Code** field and **Note** text box. For our example, we will select the first item.

![Contact note added.]

To compare the note details, used in our example, we will select the second item.

![Contact note updated.]

5. Click **(Close)**.

axiUm closes the Patient Contact Notes History window and returns to the previous window.

You have now successfully displayed the historic list of contact notes for the patient record.

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### 10 Using Patient Labels

Printing of patient chart labels with bar codes can be done for a single patient or for a group of patients. These bar coded charts can then be used in axiUm’s Chart Tracker module to keep track of the location of each chart in the clinic. The location of each patient’s chart is stored, along with a history of the chart’s location including the name of the person who had the chart and when and why they had it, if applicable.

You can also use this feature to create mailing labels.
This section covers the following topics:

- Opening the Labels window
- The Labels window
- Creating patient labels
- Editing patient labels
- Using Word templates for patient labels
- Using label templates
- Printing patient labels

### 10.1 Opening the Labels Window

▼To create new labels containing new text:

1. Open the **Patient Card** window.

   For instructions on opening the Patient Card window, see *Opening the Patient Card* on page 4.

2. Click ![Print Patient Label](image).

   axiUm displays the Select Patient Label window.

3. Click **Old Template**.

   axiUm displays the Labels window.

The next section describes the Labels window.
10.2 The Labels Window

This is how the Labels window may look when you open it.

![Labels Window]

Use this window for:

- Creating new labels
- Editing patient labels
- Using Word templates
- Using label templates
- Printing patient labels

The following sections will explain the procedures for these tasks.

10.3 Creating Patient Labels

Creating Patient Labels Containing New Text

▼ To create a new label with new text:

1. Open the Labels window.

   For instructions on opening the Labels window, see Opening the Labels Window on page 62.

2. Click New.
axiUm displays the Report Editor window.

3. Right-click anywhere in the white area of the window.

axiUm displays a rectangular frame to display your text.

4. Double-click on the rectangle.
axiUm displays the Edit Object window. The current rectangle’s configuration is displayed in the fields.

![Current rectangle’s configuration](image)

5. Select the **Text** option.

6. In the X field and Y field, enter the position of the cell. For our example, we will enter:
   - X: 0
   - Y: 0

7. In the W field enter the width of the cell. For our example, we will enter **700**.

8. In the #Lines field enter the number of lines it is to contain. For our example, we will enter **3**.

![At this time you can specify the fonts.](image)
To specify the fonts:

8.1. Click Pick.

axiUm displays your standard Windows Font window.

8.2. Enter the fields and options provided. For our example, we will select:

- Font: Arial Narrow
- Font style: Bold
- Size: 9

8.3. Click OK.

axiUm applies the selected font and returns to the Edit Object window.

9. Select an alignment. For our example, we will select the Align Center option.

10. Select how to wrap the text. For our example, we will select the Word Break option.
11. In the text box, enter the label you want to display. For our example, we will enter Jane Doe, Chart #247.

12. Click OK.

axiUm saves your changes, closes the Edit Object window, and displays the Report Editor window.

axiUm displays the text you entered according to the specifications you set.

13. In the Description field, enter a description. For our example, we will enter Jane Doe Text Label.
14. Click Save.

axiUm saves the label, closes the Report Editor window, and returns to the Labels window. It also displays the new label.

You have now successfully created a new label with new text.

Creating Patient Labels Containing Data Fields

▼To create a new label containing data fields:

1. Open the Labels window.

   For instructions on opening the Labels window, see Opening the Labels Window on page 62.

2. Click New.
Using Patient Labels

axiUm displays to Report Editor window.

3. Right-click anywhere in the white area of the window.

axiUm displays a rectangular frame to display your text.

4. Double-click on the rectangle.
axiUm displays the Edit Object window. The current rectangle’s configuration is displayed in the fields.

5. Select the **Data Field** option.

axiUm activates the Data Field button.

6. Click **Data Field**.

axiUm displays the Data Field window,

7. From the **File** drop-down field, select an item from which the data will be retrieve. For our example, we will select **Patient**.

8. From the **Field** drop-down, select an item list. For our example, we will select **Pt. First**.

9. Click **OK**.

axiUm saves the entries, closes the Data Field window, and returns to the Edit Object window.

10. In the **X** field and **Y** field, enter the position of the cell. For our example, we will enter:
11. In the **W** field enter the width of the cell. For our example, we will enter 700.

12. In the **#Lines** field enter the number of lines it is to contain. For our example, we will enter 3.

13. Click **OK**.

axiUm saves your entries, closes the Edit Object window, and returns to the Report Editor.
axiUm displays the text you entered according to the specifications you set.

14. In the Description field, enter a description. For our example, we will enter Jane Doe Data Label.

15. Click Save.

axiUm saves the label, closes the Report Editor window, and returns to the Labels window. It also displays the new label.

You have now successfully created a new label containing data fields.

When you print this label, the patient’s first name will automatically display in the cell marked Pt. First. The text that was entered in the previous steps will appear in the top cell as shown.
10.4 Editing Patient Labels

You can edit patient labels in the Report Editor window by:

- Deleting objects
- Moving objects

This section covers instructions for these tasks.

Deleting Objects in the Report Editor Window

▼ To delete an object from the Report Editor window:

1. Open the Report Editor window.
2. Hold down the CTRL key and click on the rectangle.
   axiUm changes the color of the rectangle to blue.

3. Click Delete.
   axiUm displays a message box.

4. Click Yes.
axiUm deletes the object. The program will prompt with a warning box to ensure the item should be deleted.

You have now successfully deleted an object from the Report Editor window.

**Moving Objects in the Report Editor Window**

There are different ways to move objects in the Report Editor window:

- Re-entering configurations
- Clicking and dragging

The following instructions cover these methods.

▼ **To move an object by re-entering configurations:**

1. Open the Report Editor window.
2. Double-click on the rectangle.
axiUm displays the Edit Object window. The current rectangle’s configuration is displayed in the fields.

3. Make changes to the fields and options. For our example, we will select the **Align Left** option.
4. Click **OK**.

axiUm updates your entries, closes the Edit Object window, and returns to the Report Editor.

5. Click **Save**.

axiUm saves the updates, closes the Report Editor window, and returns to the Labels window.

You have now successfully moved an object by re-entering the configurations.

**To move an object by clicking and dragging:**

1. Open the **Report Editor** window.
2. Hold down the **CTRL** key and click on the rectangle.
axiUm changes the color of the rectangle to blue.

3. Go inside the blue rectangle, and then click and hold down the mouse.

The rectangle should remain blue.

4. Drag the mouse to move the rectangle to a new position.

5. Release the mouse.

6. Left-click outside the rectangle.
The rectangle changes to black.

You have now successfully moved an object in the Report Editor window using the click-and-drag method.

💡 Click-and drag multiple objects to move them simultaneously.

## 10.5 Using Word Templates for Patient Labels

For information and instructions on using Word templates to create patient labels, refer to the axiUrn User Guide for Info Manager module.

## 10.6 Using Label Templates

Label templates must be created before any labels can be printed. The label template contains information on the type of labels that the clinic will be using. Label templates involve setting the dimensions of the labels, margins used when printing labels, and the format of the sheets that the labels are on. Label templates contain no text.

### Creating Label Templates

**To create a label template:**

1. Open the **Labels** window.
   
   For instructions on opening the Labels window, see *Opening the Labels Window* on page 62.

2. Highlight a label. For our example, we will select **Jane Doe Text Label**.

3. Click **Select**.
axiUm displays the Choose Label window.

![Choose Label Window](image)

4. Click **Setup**.

axiUm displays the Set Up Labels window.

![Set Up Labels Window](image)

5. In the **Description** field, enter a label description. For our example, we will enter Chart Label.

6. Specify all the necessary properties. For our example, we will enter:
   - **Top Margin**: 4
   - **Bottom Margin**: 4
   - **Label Width**: 20
• Label Height: 4
• Rows: 1
• Columns: 1

7. Click **Add**.

axiUm adds the template to the list view.

8. Click **Close**.
axiUm saves the new label, closes the Setup Labels window, and displays the label in the Choose Label window.

You have now successfully created a label template.

**Modifying Label Templates**

▲To modify a label template:

1. Open the **Labels** window.

   For instructions on opening the Labels window, see *Opening the Labels Window* on page 62.

2. Highlight a label. For our example, we will select **Jane Doe Text Label**.

3. Click **Select**.
axiUm displays the Choose Label window.

4. Highlight an item. For our example, we will select Chart Label.
5. Click Setup.

axiUm displays the Set Up Labels window.

6. Make changes to the fields and options. For our example we will change:
- **Description**: Paper Chart Label
- **Orientation**: Landscape

7. Click **Modify**.

axiUm saves the changes.

8. Click **Close**.
axiUm saves the changes, closes the Setup Labels window, and returns to the Choose Label window. axiUm also displays the new description.

You have now successfully modified a label template.

Deleting Label Templates

▼ To delete a label template:

1. Open the **Labels** window.

   For instructions on opening the Labels window, see *Opening the Labels Window* on page 62.

2. Highlight a label. For our example, we will select **Jane Doe Text Label**.

3. Click **Select**.
4. Highlight an item. For our example, we will select Chart Label.
5. Click Setup.

axiUm displays the Setup Labels window.

6. Highlight an item. For our example, we will select Chart Label.
7. Click Delete.
axiUm displays a message box.

![Message Box](image)

8. Click **Yes**.

axiUm deletes the item from the Setup Labels window.

![Setup Labels](image)

9. Click **Close**.

axiUm saves your deletion, closes the Setup Labels window, and returns to the Choose Label window.

![Choose Label](image)

You have now successfully deleted a label template.
10.7 Printing Patient Labels

▼To print a patient label:

1. Open the Labels window.

   For instructions on opening the Labels window, see Opening the Labels Window on page 62.

2. Highlight a label. For our example, we will select Jane Doe Text Label.

3. Click Select.

   axiUm displays the Choose Label window.

   ![Choose Label Window]

4. Highlight an item. For our example, we will select Paper Chart Label.

5. Click OK.

   axiUm displays the Select Printer window.

   ![Select Printer Window]
6. Highlight an item. This is the printer you want to print to.

You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

7. Click Select.

axiUm prints the label to the selected printer.

You have now successfully printed a patient label.

11 Printing Patient Records

▼To print a hard copy of the patient card:

1. Open the Patient Card window.

For instructions on opening the Patient Card window, see Opening the Patient Card on page 4.

2. Click (Print Patient Info).

axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

axiUm prints the report to the selected printer.

You have now successfully printed a patient record.
12 Checking Patients In & Out

This section covers the following topics:

- Checking patients in
- Checking patients out

12.1 Checking Patients In

Check-ins are different from sign-ins.

**Check-in**
You check-in patients at the clinic desk to indicate the patient is ready to be seen by a dentist.

**Sign-in**
You sign-in patients at the institution’s general reception to indicate that the patient has arrived and has been directed to the clinic.

As patients arrive at the clinic, they must be checked in for their appointments. This action changes the color of the patient name in the Rolodex, and changes the color of the appointment text to visually indicate that the patient has arrived.

The patient to be checked in must be in the selected list. For instructions on adding patients to the patient selection list, see Adding Patient Names to the Patient Selection List on page 188.

\[\text{To check in patients:}\]

1. Highlight a patient’s name.
2. Right-click to display a list of options.

3. Click Patient Check In.

axiUm displays the patient’s name in red.

You have now successfully checked in a patient.

12.2 Checking Patients Out

When patients leave the clinic, they must be checked out from axiUm.
To check out patients:

1. Highlight a patient’s name.
   
   Checked out patient names are in red until you highlight it.

![Patient Highlighted]

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

![Options Menu]

3. Click **Patient Check Out**.

   axiUm displays the patient’s name in black.

   ![Checked Out Patient]

   You have now successfully checked out a patient.
13 Using Patient Check In Form

The Patient Check In form shows basic patient information including insurance and balances due, and planned treatment data. The Patient Check In Form menu option can also be used to display this form.

For patient check-ins, axiUm can be set up to automatically display the patient check in form. Alternatively you can manually open the form.

You must check in the patient before you can access the Patient Check In Form. For instructions on checking patients in, see Checking Patients In on page 88.

▼ To display the patient check in form:

1. Highlight a patient’s name.

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

3. Click Patient Check In Form.
axiUm displays the patient check-in form.

The form shows basic patient information including insurance and balances due, and planned treatment data.

You have now successfully displayed the check-in form for the patient.

14 Managing Patient Recalls

Use the Patient Recalls window to manage the recall list for the currently selected patient.

Upon completion of a procedure that requires a recall, the system can prompt the user to enter a patient recall record, or automatically enter the recall on behalf of the provider (depending on how your institution has set up recall controls).

This section covers the following topics:

- Opening the Patient Recalls window
- The Patient Recalls window
- Creating patient recall templates
- Modifying patient recall templates
• Deleting patient recall templates
• Viewing patient recall activity history

14.1 Opening the Patient Recalls Window

There are different methods to open the Patient Recalls window:

• From the Rolodex module
• From the Patient Card window.

This section covers the different methods.

To open the Patient Recalls window using the Rolodex module:

1. Go to the patient selection list.
   Alternatively, go to the patient list.

2. Highlight a patient’s name.

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

4. Click Patient Recalls.

   axiUm displays the Patient Recalls window.
To open the Patient Recalls window using the Patient Card window:

1. Open the **Patient Card** window.

   For instructions on opening the Patient Card window, see *Opening the Patient Card* on page 4.

2. Click (Recall).

   axiUm displays the Patient Recalls window.

The next section describes the Patient Recalls window.

### 14.2 The Patient Recalls Window

This is how the Patient Recalls window may look when you open it.

![Patient Recalls Window](image)

Depending on how your institution has set up the recall system, some portions of the window may default according to the user. Otherwise they must fill in the fields manually.

Use this window for:

- Creating patient recall templates
- Modifying patient recall templates
- Deleting patient recall templates
- Viewing patient recall activity history
The following sections will explain the procedures for these tasks.

### 14.3 Creating Patient Recall Templates

You can create templates to standardize frequently entered patient recalls.

**To create a patient recall template:**

1. Open the Patient Recalls window. For our example, we will use Mary Doe’s record.

   For instructions on opening the Patient Recalls window, see *Opening the Patient Recalls Window* on page 93.

2. Enter the fields and options. For our example, we will enter:
   
   - **Recall Code**: 01M, 1 Month
   - **Recall Type**: HYG, Hygiene

3. Click ![Add a new Record](image)

![Patient Recalls window with example recall](image)
axiUm adds the new record to the list view.

You have now successfully created a patient recall template.

14.4 Modifying Patient Recall Templates

▼ To modify a patient recall template:

1. Open the Patient Recalls window.

   For instructions on opening the Patient Recalls window, see Opening the Patient Recalls Window on page 93.

2. Re-enter the fields and options. For our example, we will enter:

   • Recall Code: 03M, 3 Months
   • Recall Type: ENDO, Endodontics

3. Click (Modify Record).
axiUm updates the record in the list view.

You have now successfully modified a patient recall template.

14.5 Deleting Patient Recall Templates

To delete a patient recall template:

1. Open the Patient Recalls window.
   
   For instructions on opening the Patient Recalls window, see Opening the Patient Recalls Window on page 93.

2. From the list view, highlight an item. For our example, we will select code 03M.

3. Click (Delete Record).
axiUm deletes the record from the list view.

You have now successfully deleted a patient recall template.

14.6 Viewing Patient Recall Activity History

axiUm retains a historic record of all changes made to each patient recall record. The historic records contain:

- Recall information
- Type of action
- User name of the person who made the changes
- Date and time of change

For our example, we will use Jane Doe’s patient record.

To view activity history of patient recalls:

1. Open the Patient Recalls window.

   For instructions on opening the Patient Recalls window, see Opening the Patient Recalls Window on page 93.

2. Click (History).
axiUm displays the Patient Recall History window.

3. From the list view, highlight an item.

axiUm displays details of the patient recall record.

You have now successfully displayed the patient recall activity history.

15 Submitting Patient Needs Requests

Patient needs are entered during the screening process. This is a list of general patient needs that are not specific to ADA codes and have no associated dollar value.
Once patient needs are identified, axiUm can match these patients to providers who are waiting to fulfill specific treatments for graduation requirements.

This section covers the following topics:

- Opening the Patient Needs window
- The Patient Needs window
- Creating patient needs
- Creating multiple patient needs
- Modifying patient needs
- Deleting patient needs

15.1 Opening the Patient Needs Window

There are two methods to opening the Patient Needs window:

- Rolodex Module
- Patient Info window

This section covers the different methods.

▼To open the Patient Needs window using the Rolodex module:

1. Go to the patient selection list.
   Alternatively, go to the patient list.

2. Highlight a patient’s name.
3. Right-click to display a list of options.

![Right-click menu]

4. Click **Patient Needs**.

axiUm displays the Patient Needs window.

▼ **To open the Patient Needs window using the Patient Info window:**

1. Open the **Patient Info** window.

   For instructions on accessing the Patient Info window, see *Viewing Patient Records on the Patient Info Window* on page 16.

2. Click the **Codes** tab.

3. Click **Needs**...

   axiUm displays the Patient Needs window.

The next section describes the Patient Needs window.
15.2 The Patient Needs Window

This is how the Patient Needs window may look when you open it.

Use this window for:

- Creating patient needs
- Creating multiple patient need records
- Modifying patient need records
- Deleting patient need records

The following sections will explain the procedures for these tasks.

15.3 Creating Patient Needs

To create patient needs:

1. Open the Patient Needs window.
   
   For instructions on opening the Patient Needs window, see Opening the Patient Needs Window on page 100.

2. Go to the Need Code field and click (ellipsis).
   
   axiUm displays the Need Codes window.
For information on the Need Codes window, refer to the axiUm Reference Manual for Maintenance and see Need Codes Window on page 588.

3. From the list view, highlight an item. For our example, we will select CD L 4, CD Lower, Year 4.

4. Click (Close).

Alternatively, double-click on the item.

axiUm displays the selected needs code in the Need Code field.

5. Click (Add a new Record).

axiUm adds the new record to the list view.
You have now successfully created patient needs for a patient record.

15.4 Creating Multiple Patient Needs

▼To create multiple patient needs:

1. Open the Patient Needs window.

   For instructions on opening the Patient Needs window, see Opening the Patient Needs Window on page 100.

2. Click (Add Multiple Records).

   axiUm displays the Add Patient Needs window. For information on the Add Patient Needs window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Add Patient Needs Window on page 6.

3. From the list view, highlight multiple items. For our example, we will select:

   - CD U 4
   - ENDO A
4. Click OK.

axiUrn adds the selected items to the Patient Needs window.

You have now successfully created multiple patient needs for a patient record.
15.5 Modifying Patient Needs

To modify patient needs:

1. Open the Patient Needs window.

   For instructions on opening the Patient Needs window, see Opening the Patient Needs Window on page 100.

2. From the list view, highlight an item. For our example, we will select need code CD U 4.

3. Make changes to the fields and options. For our example, we will select Status RESOLV.

4. Click (Modify Record).

   axiUm saves the changes and updates the details in the list view.

   ![Selected code displayed.]

You have now successfully modified patient needs in a patient record.

15.6 Deleting Patient Needs

To delete patient needs:

1. Open the Patient Needs window.

   For instructions on opening the Patient Needs window, see Opening the Patient Needs Window on page 100.
2. From the list view, highlight an item. For our example, we will select need code 
   CD U 4.

3. Click (Delete Record).

   axiUm displays a message box.

4. Click Yes.

   axiUm deletes the item from the list view.

You have now successfully deleted patient needs from a patient record.

16 Restricting & Freeing Access to Patient Records

You can, for example, allow providers access to records of patients they are assigned to, that 
way providers have exclusive access to their patient records.

You can also give all users access to patient records, so that everyone can access them.

Only faculty members can restrict or free access to patient records.
This section covers the following topics:

- Restricting access to patient records
- Freeing access to patient records

### 16.1 Restricting Access to Patient Records

Sometimes it may be necessary to allow only assigned providers access to patient records instead of giving all users access to it.

There are different methods in restricting access to patient records:

- Rolodex module
- Patient Info window

This section covers the different methods.

**To restrict access to patient records using the Rolodex module:**

1. Search for a patient.
   
   For instructions on searching patients, see *Searching Patient Files* on page 11.

2. Go to the patient selection list.

   Alternatively, go to the patient list.

3. Highlight a patient’s name.
4. Right-click to display a list of options.

5. Click Restricted Access.

The patient is immediately given a restricted access status that restricts other users from accessing this record.

axiUm indicates this on the Patient Card window and in the Patient Info window’s Codes tab.
You have now successfully restricted access to a patient record from the Rolodex module.

▼To restrict access to patient records using the Patient Info window:

1. Open the Patient Info window.
   
   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Codes tab.

3. Deselect the Free Access checkbox.

   ![Deselect this checkbox.]

   The patient is immediately given a restricted access status that restricts other users from accessing this record.
axiUm indicates this on the Patient Card window.

You have now successfully restricted access to a patient record from the Patient Info window.

16.2 Freeing Access to Patient Records

Sometimes it may be necessary to make patient records accessible to all users rather than restricting access to only assigned providers.

There are different methods in freeing access to patient records:

- Rolodex module
- Patient Info window

This section covers the different methods.

▼To free access to patient records using the Rolodex module:

1. Search for a patient.
   
   For instructions on searching patients, see Searching Patient Files on page 11.

2. Go to the patient selection list.
   
   Alternatively, go to the patient list and highlight a patient’s name.
3. Left-click to display a list of options.
4. Highlight a patient’s name.
5. Right-click to display a list of options.
6. Click Free Access.
The patient is immediately given a free access status that all users can see.

You have now successfully freed access to a patient record from the Rolodex module.

▼ To free access to patient records using the Patient Info window:

1. Open the Patient Info window.

   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Codes tab.

3. Select the Free Access checkbox.

4. Click Save.

   The patient is immediately given a free access status that gives other users access to this patient record.

5. Click Close.
axiUm Version 5.11

axiUm closes the Patient Info window and returns to the Patient Card window.

axiUm indicates this on the Patient Card window.

You have now successfully freed access to a patient record from the Patient Info window.

17 Using Chart Locks

There are various reasons for locking patient charts. For example:

- Patients with overdue accounts and are not allowed to receive further treatments until they pay some of their outstanding balances.
- Patients who frequently miss appointments and may require additional confirmation before they can booked appointments.
- Patients who have not signed and returned consent forms for receiving treatments, and the procedure cannot move ahead until this is done.

These and other reasons can be set in the office codes. When office codes exist in the patient record, the patient record may be locked, preventing users from accessing them, and therefore restricting users from booking appointments or entering further treatments.
You can:

- Apply the chart lock, thereby barring users from accessing it until the lock is lifted.
- Remove the chart lock, thereby giving users access to it for a day.

17.1 Applying Chart Locks

When you apply chart locks, you are barring users from accessing patient records until the lock is lifted.

There are different methods for unlocking patient charts:

- Rolodex module
- Patient Info window

This section covers the different methods.

To enable patient chart locks using the Rolodex module:

1. Search for a patient.
   
   For instructions on searching patients, see Searching Patient Files on page 11.

2. Go to the patient selection list.
   
   Alternatively, go to the patient list and highlight a patient’s name.

3. Left-click to display a list of options.
4. Highlight a patient’s name.
5. Right-click to display a list of options.

![Menu options](image)

6. Click **Use Chart Locks**.

The patient chart can now be locked.

You have now successfully enabled the chart lock from the Rolodex module. You can now use chart locks on this patient.

**To enable patient chart locks using the Patient Info window:**

1. Open the **Patient Info** window.

   For instructions on opening the Patient Info window, see *Viewing Patient Records on the Patient Info Window* on page 16.

2. Click on the **Codes** tab.
3. Deselect the **No Chart Locks** checkbox.

4. Click **Save**.

The patient chart can now be locked.

You have now successfully locked the patient chart using the Patient Info window.

### 17.2 Removing Chart Locks

In the event a patient with a locked patient record require emergency treatments, they can be given a pardon and have their patient locks lifted for that day only. If you have a custom overnight script, axiUm will return the lock on the patient record.

There are different methods for removing chart locks:

- Rolodex module
- Patient Info window

This section covers the different methods.
To unlock patient charts using the Rolodex module:

1. Search for a patient.
   
   For instructions on searching patients, see *Searching Patient Files* on page 11.

2. Go to the patient selection list.

   Alternatively, go to the patient list and highlight a patient’s name.

3. Left-click to display a list of options.

4. Highlight a patient’s name.

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

6. Click **No Chart Locks**.

   The patient chart is now unlocked.

You have now successfully unlocked the patient chart using the Rolodex module.
To unlock patients using the Patient Info window:

1. Open the Patient Info window.

   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Codes tab.

3. Select the No Chart Locks checkbox.

4. Click Save.

   The patient chart is now unlocked.

You have now successfully unlocked the patient chart using the Patient Info window.

18 Using Patient Attachments

See the axiUm User Guide for the Patient Attachments module.

19 Scheduling Patients

See the axiUm User Guide for the Scheduler module
This chapter covers the utilities in the Rolodex / Patient Card module that pertains to the patients’ guarantors.

A guarantor is the payee of the treatment that the patient receives. A parent is often a child’s primary guarantor. Should the child be too young to pay for the treatment, the parent must take responsibility for the total cost of the invoice. Then the parent can send the invoice to their medical insurance company, if they have a benefit plan.

It is common to have more than one guarantor. The primary guarantor is the first to receive the invoice, and any other guarantors will pay for the remainder. This way, for example, the primary guarantor (e.g. the father) can process the invoice using his medical insurance, and the secondary guarantor (e.g. the mother) can process the remainder by cash.

You may also want to assign a guarantor to a patient if the patient has a poor credit history with the institution.

When you create a new patient record and you do not indicate a guarantor, axiUm automatically selects the patient as their own guarantor. You can change this information anytime.

This chapter covers the following topics:

- Opening the Guarantor tab
- Adding guarantors
- Viewing guarantor information
- Modifying guarantor information
- Converting guarantors to patients
- Viewing history of guarantor activities
- Deleting guarantor information

At the end of this chapter you will be familiar with these tasks.
1 Opening the Guarantor Tab

▼To open the Guarantor Tab:

1. Open the Patient Info window.

   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click the Guarantor tab.

   If the patient has no guarantor, axiUm automatically assigns the patient as their own guarantor. In our example, Jane Doe is her own guarantor.

   If the patient is a child, and has no parent assigned as a guarantor, the child must be the primary guarantor. Then they can take the invoice home to their parents.

   If the child patient has a parent assigned as a guarantor, make sure the parent’s record indicates they are the primary guarantor and clear any primary or secondary guarantor option for the child.

You have now successfully opened the Patient Info window’s Guarantor tab.
2 Adding Guarantors

There are different types of guarantors:

- Guarantors who are not patients in axiUm
- Guarantors who are patients in axiUm

This section explains how to add the different types of guarantors to patient records.

2.1 Creating Guarantors who are not Patients

Check to make sure that the guarantor is not a patient in axiUm. Creating a guarantor who is already a patient will result in duplicate records. To determine if the guarantor is already a patient in axiUm, search for guarantor names in the Rolodex as you would searching for patients. For instructions on searching for patients in the Rolodex module, see Searching Patient Files on page 11.

If you manually entered guarantors who are already patients, and you end up with multiple records, you can delete the extraneous ones. To delete extraneous guarantor records, see Deleting Extraneous Guarantor Records from axiUm on page 132.

For our example, we will use Jane Doe. We will add her husband John Doe as her guarantor.

▼To add a guarantor who is not a patient in axiUm:

1. Open the Patient Info window’s Guarantor tab.

   For instructions on opening the Patient Info window’s Guarantor tab, see Opening the Guarantor Tab on page 122.

2. Click (Clear Data).
axiUm clears some of the fields and options.

3. Enter the fields and options. For our example, we will enter:
   - **Relationship**: husband
   - **Title**: Mr.
   - **First**: John

4. Click (Add a new Record).
axiUm adds the guarantor to the list view.

5. Click Save.

axiUm saves the entries in the list view. axiUm also automatically selects the guarantor as the primary guarantor.

You have now successfully added a guarantor who is not a patient in axiUm.

The new guarantor is added to the Guarantor Rolodex window. To open the Guarantor Rolodex window, go to the Title field and click (ellipsis).

A deselected checkbox indicates that they are inactive patients.

By creating an inactive patient record in axiUm, the guarantor record can be reused in other patient records, and also be turned into patient records should they decide to become patients at the institution. For instructions on converting guarantors into patients, see Converting Guarantors to Patients on page 129.

2.2 Adding Guarantors who are Patients

For our example, we will use Jane Doe. We will add her husband John Doe as her guarantor.

▼To add a guarantor who is a patient in axiUm:

1. Open the Patient Info window’s Guarantor tab.

   For instructions on opening the Patient Info window’s Guarantor tab, see Opening the Guarantor Tab on page 122.
2. Click (Clear Data).

axiUm clears some of the fields and options.

3. Click the Select Guarantor button.

axiUm displays the Guarantor Rolodex window.

4. Search for a name. For our example, we will search for Doe.

5. Highlight a guarantor name. For our example, we will select John Doe.

6. Click (Close).

Alternatively, double-click the item.
Viewing Guarantor Information

axiUm saves your selection, closes the Guarantor Rolodex window, and returns to the Patient Info window.

7. Click (Add a new Record).

axiUm adds the guarantor to the list view.

8. Click Save.

You have now successfully added a guarantor who is a patient in axiUm.

3 Viewing Guarantor Information

▼To view guarantor information:

1. Open the Patient Info window’s Guarantor tab.

For instructions on opening the Patient Info window’s Guarantor tab, see Opening the Guarantor Tab on page 122.

2. From the list view, select a guarantor. For our example, we will select John Doe.
axiUm displays the details in the fields and options.

You have now successfully viewed guarantor information in a patient record.

4 Modifying Guarantor Information

▼ To modify guarantor information:

1. Display guarantor information.

   For instructions on viewing guarantor information, see Viewing Guarantor Information on page 127.

2. Re-enter the fields and re-select options. For our example, we will change his phone number to 509-524-1749.

3. Click (Modify Record).
Converting Guarantors to Patients

Converting Guarantors to Patients

axiUmp updates the guarantor information.

4. Click Save.

axiUmp saves the changes.

You have now successfully modified a guarantor’s information in a patient record.

5 Converting Guarantors to Patients

Often a person entered into axiUmp as a patient’s guarantor later wishes to become a patient.

To convert guarantors to patients:

1. Display guarantor information.

For instructions on viewing guarantor information, see Viewing Guarantor Information on page 127.

2. From the list view, highlight the guarantor who is to become a patient.

3. Click (Convert to Patient).
axiUm converts the guarantor to a patient.

You have now successfully converted a guarantor to a patient in axiUm.

The guarantor records can only be created, found, and converted into a patient in the Guarantor tab of the patient card. Manually entered guarantor records cannot be converted into patients, If the icon is not available when the guarantor is selected, the guarantor is already a patient.

6 Viewing Guarantor Information Activity History

axiUm retains a historic record of all changes made to each guarantor record. The historic records contain:

- Name of guarantor
- All areas of the Guarantor tab for comparing changes
- Type of action
- User name of the person who made the changes
- Date and time of change

For our example, we will use Jane Doe’s patient record. Because she is also her own guarantor, we will select her self-guarantor record.

▼To view activity history of guarantor information:

1. Follow instructions for viewing guarantor information.

   For instructions on viewing guarantor information, see Viewing Guarantor Information on page 127.

2. From the list view, highlight a guarantor. For our example, we will select Jane Doe.

3. Click (Show History).
Deleting Guarantors

You have now successfully opened and displayed a guarantor’s information history.

7 Deleting Guarantors

This section covers the following topics:

- Deleting guarantor information from patient records
- Deleting extraneous guarantor records from axiUm

7.1 Deleting Guarantor Information from Patient Records

To delete guarantor information from a patient record:

1. Display guarantor information.

   For instructions on viewing guarantor information, see Viewing Guarantor Information on page 127.

2. From the list view, highlight a record.

3. Click (Delete Record).
axiUm deletes the guarantor from the list view.

4. Click Save.

axiUm saves the deletion.

You have now successfully deleted a guarantor’s information from a patient record.

7.2 Deleting Extraneous Guarantor Records from axiUm

When you add guarantors to patient records, it is best to search for guarantors in the Guarantor Rolodex window to determine if they are already patients in axiUm. If you manually entered new guarantor information directly in the Patient Info window’s Guarantor tab and saved the information, axiUm stores this entry as a separate record. This is because axiUm cannot identify and match the details of the new record to those of existing records, therefore, axiUm cannot consolidate the identical records. This results in multiple records of the same person. To avoid confusion and reduce clutter, you can delete these extraneous guarantor records.

There is no direct method of deleting extraneous guarantor records. You must convert all manually entered guarantor records into patient records. Once they are patient records, you can delete these patients.

In this example, our Jane Doe record indicates that her husband John Doe is her primary guarantor. When this guarantor record was created, the user manually entered the fields instead of clicking the (ellipsis) and selecting from the Guarantor Rolodex window. The result is as follows:
This is an example of a manually entered guarantor record. The user entered the information in each field. Because the guarantor is already a patient in axiUm, this created a new guarantor record identical to an existing patient record.

1. Manually entered information.
2. Saved as new guarantor record.
3. Results in identical record. The deselected check box is the one manually created.
This is an example of a guarantor record selected using the Guarantor Rolodex window. The information is taken from the existing record and automatically displays it in the fields.

The following procedure will take the first example and explain how to delete extraneous records.

To delete extraneous guarantor records:

1. Open guarantor information.

   For instructions on viewing guarantor information, see Viewing Guarantor Information on page 127.

2. Add guarantors to the patient record.

   These are all the extraneous ones you see in the Guarantor Rolodex. Add each one to the patient record. For instructions on adding guarantors to patient records, see Adding Guarantors who are Patients on page 125. Remember to select only those that are not patients (deselected checkbox).
3. Convert each guarantor to a patient.

For instructions on converting guarantors to patients, see *Converting Guarantors to Patients* on page 129.

Now that they are patients, you can access their records in the Rolodex module.

4. Search for these new patients. For our example, we will search for **John Doe**.

For instructions on searching for patient records, see *Searching Patient Files* on page 11. axiUm displays all instances of John Doe that you converted from guarantor to patient.

5. Delete the extraneous records from the Rolodex. In our example, there is only one.

   ![Extraneous record. Delete.](image1)
   ![Original record. Do not delete.](image2)

   *Do not delete the original patient by the same name. Once you delete a patient record, you cannot retrieve it.*

For instructions on deleting patient records, see *Deleting Patient Records* on page 41.

You have now successfully deleted all extraneous guarantor records from axiUm.

All extraneous guarantor records are now deleted. The original guarantor record that was converted to a patient is still in the system to be used.
EMployers

This chapter covers the utilities in the Rolodex / Patient Card module that pertains to the patients’ employers.

Often patients work for an organization on hire. Other times, patients are sole proprietors who work for themselves on a contract basis, and are not hired by organizations.

If the patient works for an employer, entering employer records in axiUm allows you to link the employer to the insurance company used. Then you can select a benefit plan made specifically for that organization’s employers. This chapter covers these instructions.

If a patient does not have an employer, they may still use a medical insurance company. You can skip the employer record and apply the patient’s personal medical plan to their record. To apply benefit plans to a patient without an employer, skip this chapter and see Insurance & Benefit Plans on page 231.

This chapter covers the following topics:

- Opening the Employers tab
- Adding employer information
- Viewing current employer information
- Viewing deleted employer information
- Modifying employer information
- Previewing employer information
- Printing employer information
- Viewing employer information activity history
- Deleting employer information
- Linking employers to insurance benefit plans

At the end of this chapter you will be familiar with these tasks.
1 Opening the Employers Tab

To open the Employers tab:

1. Open the Patient Info window.

For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click the Employer tab.

You have now successfully opened the Patient Info window’s Employer tab.

2 Adding Employer Information

If the patient is a child, you can leave the Employer tab empty.

To add employer information to a patient record:

1. Open the Patient Info window’s Employer tab.

For instructions on opening the Patient Info window’s Employer tab, see Opening the Employers Tab on page 138.
2. Go to the **Employer** field and click (ellipsis).

axiUm displays the Employer List window. For information on the Employer List window, refer to the axiUm Reference Manual for Maintenance and see *Employer List Window* on page 584.

3. Search for an employer. For our example, we will enter **GDL Home Services**.

4. Highlight a name. For our example, we will select **GDL Home Services**.

5. Click (Close).

Alternatively, double-click the item.
axiUm saves your selection, closes the Employer List window, and returns to the Patient Info window. axiUm also displays the details of the selected employer in the associated fields.

6. Go to the **Occupation** field and click (ellipsis).

axiUm displays the Occupations window.

For information on the Occupations window, refer to the axiUm Reference Manual for Maintenance and see *Occupations Window* on page 593.

7. From the list view, highlight an occupation. For our example, we will select **Customer Service Rep**.
8. Click (Close).

Alternatively, double-click the item.

axiUm saves your selection, closes the Occupations window, and returns to the Patient Info window.

9. Click (Add a new Record).

axiUm saves the entries and adds the employer information to the list view.

You have now successfully added employer information to a patient record.

3 Viewing Current Employer Information

▼To view current employer information:

1. Open the Patient Info window’s Employer tab.

For instructions on opening the Patient Info window’s Employer tab, see Opening the Employers Tab on page 138.
2. From the list view, select an employer. For our example, we will select GDL Home Services.

axiUm displays the details in the fields and options.

You have now successfully viewed current employer information in a patient record.

4 Viewing Deleted Employer Information

For our example, we will use John Doe’s patient record.

To view deleted employer information:

1. Open the Patient Info window’s Employer tab.

   For instructions on opening the Patient Info window’s Employer tab, see Opening the Employers Tab on page 138.

2. Select the Show Deleted checkbox.
axiUm displays the deleted employer information in gray.

You have now successfully viewed deleted employer information in a patient record.

5 Modifying Employer Information

To modify employer information:

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.

2. Re-enter the fields and re-select options. For our example, we will change the job title to Customer Service & Support Rep and change the phone number to (360) 638-7472.

3. Click (Modify Record).
axiUm updates the employer information.

4. Click Save.

axiUm saves the changes.

You have now successfully modified the employer information in a patient record.

6 Previewing Employer Information

▼To preview employer information:

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.

2. Click (Preview Report).
axiUm displays the Patient Employers report. This report displays all employer information activities in the patient record.

You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.

<table>
<thead>
<tr>
<th>Patient Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Doe, Jane</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

3. Click (Close).

axiUm closes the Patient Employers report and returns to the Patient Info window.

You have now successfully previewed the employer information in a patient record.

7 Printing Employer Information

Depending on your workstation setup, axiUm may display different print windows. Your workstation may default to the previously selected printer, including the folder you selected if you printed the report to file. Or you may be prompted to select a printer.

To print employer information:

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.

2. Click (Print Report).
axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

   axiUm prints the report to the selected printer.

You have now successfully printed the employer information for a patient record.

8 Viewing Employer Information Activity History

axiUm retains a historic record of all changes made to each employer record, including deleted records. The historic records contain:

- Name of employer
- All areas of the Employer tab for comparing changes
- Type of action
- User name of the person who made the changes
- Date and time of change

For our example, we will use Jane Doe’s patient record and her employer GDL Home Services.

▼To view activity history of employer information:

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.
2. From the list view, highlight an employer. For our example, we will select **GDL Home Services**.

3. Click **Show History**.

   axiUm displays the Patient Employer History window.

4. From the list view, highlight an item.

   axiUm displays details of the employer record.

You have now successfully viewed the activity history of the employer information in a patient record.

### 9 Deleting Employer Information

**WARNING:** You cannot delete an employer record if it has benefit plans linked to it. You must first delete the benefit plan. For instructions on deleting benefit plans, see Deleting Insurance Information from Patient Records on page 237.

**To delete employer information:**

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.
2. Click  (Delete Record).

axiUm displays a message box.

![Message Box]

3. Click Yes.

axiUm deletes the employer information from the list view.

![List View]

4. Click Save.

axiUm saves the deletion.

You have now successfully deleted employer information from a patient record.

10 Linking Employers to Insurance Benefit Plans

Insurance benefit plans are medical coverages provided by a specific medical insurance company and customized for a specific employer to give to their employees. You can automatically link the employer to this medical plan using axiUm. Before you continue, make sure that a benefit plan exists in the employer's records. For information on creating benefit plans, see the axiUm Reference Manual for Maintenance module.

To link employers to a benefit plan:

1. Display employer information.

   For instructions on viewing employer information, see Viewing Current Employer Information on page 141.

2. Click  (Link to Insurance Benefit Plan).
axiUm displays the Select Benefit Plan window.

3. Search for an insurance company name. For our example, we will search for United Concordia.

4. Highlight an insurance company name. For our example, we will select United Concordia.

Based on the employer indicated in the patient record, axiUm displays the benefit plan associated with that employer.

5. Click (Close).

Alternatively, double-click the item.

axiUm saves your selection, closes the Select Benefit Plan window, and displays a message box.

6. Click Yes.
axiUm displays the Policy Information window. For information on the Policy Information window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Policy Information Window on page 130.

7. Enter the fields and options. For our example, we will keep the default and change nothing.

8. Click OK.

axiUm saves the information, closes the Policy Information window, and returns to the Patient Info window. axiUm displays the insurance details in the Patient Info window’s Insurance tab. For information on the Patient Info window’s Insurance tab, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Info Window - Insurance Tab on page 100.

You have now successfully linked an employer to a benefit plan in a patient record.
This chapter covers additional utilities in the Rolodex / Patient Card module. These are utilities for the provider that may not be directly related to activities for the selected patient record. For information on utilities in the Rolodex / Patient Card module that pertain to the selected patient record, see *Patients* on page 9.

This chapter covers the following topics:

- Using the patient selection list
- Receiving faculty approvals
- Submitting provider needs requests
- Submitting appointment requests
- Submitting chart requests
- Using the dispensary requests
- Using patient-provider assignments
- Using treatment-provider assignments

At the end of this chapter you will be familiar with these tasks.

1 Using the Patient Selection List

Adding the patient’s name into the patient selection list lets you find frequently used files quickly. For information on the patient selection list, see *The Rolodex Module Window* on page 3.

Selected checkboxes in the patient selection list allows you to hold the patient in that list while you clear all other names from it.
This section covers the following topics:

- Adding patient names to the patient selection list
- Holding patient names in the patient selection list
- Taking patients off hold from the patient selection list
- Removing patient names from the patient selection list
- Viewing patient selection list of specific providers

1.1 Adding Patient Names to the Patient Selection List

When you created a new patient file, upon saving the new record, axiUm gave you the option to add it to the patient selection list. If you chose to do so, it will already be there. If not, you can add the patient to the patient selection list anytime.

You can also add inactive patients to the patient selection list. For information and instructions on de-activating patient records, see *De-activating & Activating Patient Records* on page 34.

There are different methods to add patient names to the patient selection list:

- Double-clicking the patient’s name.
- Right-clicking the patient’s name and selecting from the options.

This section covers the different methods. We will use our Jane Doe example.

▼To add a patient name to the patient selection list using the double-clicking method:

1. Go to the patient list and highlight a patient’s name.

   ![Patient List Example]

2. Double-click the patient’s name.
axiUm adds the patient to the patient selection list.

You have now successfully added a patient’s name to the patient selection list using the double-clicking method.

▼To add a patient name to the patient selection list using the right-clicking method:

1. Go to the patient list and highlight a patient’s name.

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

3. Click Select.

axiUm adds the patient to the patient selection list.

You have now successfully added a patient name to the patient selection list using the right-clicking method.
1.2 Holding Patient Names in the Patient Selection List

Holding patients in the patient selection list is helpful when:

- Retaining their name on the patient selection list while clearing all other names from the list.
- Avoiding the overnight process from removing the patient’s name from the patient selection list.

When you take all patient names off the patient selection list, only those held in the patient selection list (indicated by a selected checkbox) will remain on that list, while all others are removed.

There are different methods to hold patient names in the patient selection list:

- Marking the patient’s checkbox.
- Selecting from the options.

This section covers the different methods. We will use our Jane Doe example.

▼ To add the patient in the patient selection list using the checkbox method:

Go to the patient selection list and select the checkbox.

Selecting the checkbox in the selection list does not activate the patient record. Only those checkboxes in the patient list that are displayed as selected indicates that the patient record is active. For information and instructions on de-activating patients, see De-activating & Activating Patient Records on page 34.

axiUm will now hold the patient in the patient selection list.

You have now successfully held a patient in the patient selection list using the checkbox method.
To hold the patient in the patient selection list using the options method:

1. Go to the patient selection list and highlight a patient’s name.

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

3. Click **Hold Patient In List**.

   axiUm will now hold the patient in the patient selection list.

You have now successfully held a patient’s name in the patient selection list using the options method.

A selected checkbox in the selection list does not indicate that the patient record is active. Only those checkboxes in the patient list that are displayed as selected indicates that the patient record is active. For information and instructions on de-activating patients, see De-activating & Activating Patient Records on page 34.
1.3 Taking Patients off Hold from the Patient Selection List

If the checkbox next to their name is selected on the patient selection list, you can clear it so the patient name is taken off hold.

There are different methods to return patient names to the patient list individually:

- Using the checkbox.
- Selecting from the options.

This section covers the different methods. We will use our Jane Doe example.

▼To take a patient off hold using the checkbox method:

Go to the patient selection list and clear the checkbox.

axiUm has taken the patient’s name off hold.

You have now successfully taken a patient’s name off hold using the checkbox method.

▼To take a patient off hold using the options method:

1. Go to the patient selection list and highlight a patient’s name.

You have now successfully taken a patient’s name off hold using the options method.
2. Right-click to display a list of options.

![Image of right-click menu]

3. Click **Take Patient Off Hold**.

   axiUm will now take the patient off hold.

   ![Image of patient removed from list]

   You have now successfully held a patient in the patient selection list using the options method.

### 1.4 Removing Patient Names from the Patient Selection List

Once you start accumulating regular patients on the patient selection list, you may want to clear out those that you no longer use regularly. To do this, you must remove these patients from the patient selection list.

*axiUm does not delete the patient from the Rolodex module. They are simply removed from the easy-access list on the right to the general list on the left.*

There are different methods to return patient names to the patient list:

- Individually
- In multiples

This section covers the different methods. We will use our Jane Doe example.
To remove a patient name from the patient selection list individually:

1. Select a patient from the patient selection list.

2. If the checkbox is selected (as in our example), clear the checkbox.

   For instructions on clearing the checkbox, see *Taking Patients off Hold from the Patient Selection List* on page 156.

3. Right-click on the patient to display a list of options.

4. Click **Deselect**.

   axiUm removes the patient from the patient selection list.

You have now successfully removed a patient name using the patient selection list.
Because the patient is still in axiUm, their name remains in the patient list.

To remove a patient name from the patient selection list in multiples:

1. Go to the patient selection list.

   For our example, we will use Jane Doe (mother), John Doe (father), Mary Doe (daughter), and Mike Doe (son). All four names are held in the patient selection list (selected by checkboxes).

2. Clear checkboxes of those patient names you want to remove from the patient selection list.

   For our example, we will clear the checkboxes next to Mary and Mike.

   For instructions on clearing the checkbox, see Taking Patients off Hold from the Patient Selection List on page 156.
3. Right-click anywhere on the patient selection list to display a list of options.

![Dropdown menu](image1.png)

4. Click **Deselect All**.

axiUm removes all patients from the patient selection list. axiUm does not remove those patients with a selected checkbox.

![Selected patients](image2.png)

You have now successfully removed multiple patient names using the patient selection list. Because the patients are still in axiUm, their name remains in the patient list.
1.5 Viewing Patient Selection List of Specific Providers

Sometimes it may be necessary for instructors and/or administrative staff to view a particular user's selected list.

For our example, we will view Karina Nicoletti’s patient selection list.

▼ To view a specific user’s selected patient list:

1. Go to the patient selection list.
2. Right-click anywhere in the selected list to display the pop-up menu.
3. Click User List.
axiUm displays the Select User List window.

4. Select a user’s name. For our example, select Karina Nicoletti.
5. Click Select.

axiUm closes the Select User List window and returns to the Rolodex module. axiUm displays the selected user’s patient selection list.

You have now successfully displayed another user’s patient selection list.

To return to your selected patient list:

Repeat the previous instructions, this time selecting your own name.

2 Receiving Faculty Approvals

For information and instructions on receiving faculty approvals for treatment plans, see the axiUm User Guide for the EHR module.
3 Submitting Need Requests

A student can request for patients who have specific dental needs. Alternatively, a student can submit a request on the patient’s behalf to find another provider who can perform specific treatments. This allows you to match the student’s graduation requirements to a patient’s treatment needs.

The following procedure shows you how to submit a needs request on behalf of the patient. For this example, we will use David Caan as your student provider name.

▼ To submit a needs request:

1. Go to the patient selection list.

   Alternatively, go to the patient list.

2. Right-click anywhere in the selected list to display the pop-up menu.

3. Click Needs Request.
axiUm displays the Need Request window.

4. If the provider you want is not displayed, go to the **Provider** field and click  (ellipsis).

   axiUm displays the Providers List window.

5. Search for the provider by entering the search criteria. For our example, go to the **Criteria** field and enter **caan**.

   axiUm displays David Caan’s name.

6. From the list view, highlight the provider’s name.

7. Click  (Close).

   Alternatively, double-click on the provider’s name.
axiUm selects the name, closes the Providers List window, and returns to the Need Request window. The selected provider’s name is displayed in the Provider field.

8. Go to the **Type** drop-down field and select **Patient Need**. In our example, this is already selected.

9. Go to the **Code** field and click `(ellipsis)`.

    axiUm displays the Need Codes window. For information on the Need Codes window, refer to the axiUm Reference Manual for Maintenance and see *Need Codes Window* on page 588.

10. From the list view, select an item. For our example, we will select **ENDO A**.

11. Click `X` (Close).

    Alternatively, double-click on the item.
axiUm selects the item, closes the Need Codes window, and returns to the Need Request window. The selected code is displayed in the Code field.

12. Go to the **Patient Type** field and click (ellipsis).

axiUm displays the Patient Type Codes window. For information on the Patient Type Codes window, refer to the axiUm Reference Manual for Maintenance and see *Patient Type Codes Window* on page 617.

13. From the list view, select an item. For our example, we will select **TYPO**, Typodont.

14. Click (Close).

   Alternatively, double-click on the item.
axiUm selects the item, closes the Need Codes window, and returns to the Need Request window. The selected code is displayed in the Code field.

15. In the Note field, enter a note. For our example, we will enter Need to fulfill this treatment before end of next month.

16. Click OK.

To add multiple need requests, click the Add button instead. axiUm submits your request and clears the Need Request window for additional requests.

axiUm saves the information and closes the Need Request window.

You have now successfully submitted a needs request.

To view, modify, or delete your request after submitting it, you can do so in the Patient Assignments module. For more information and instructions, see the axiUm User Guide for the Patient Assignment module.
4 Submitting Appointment Requests

You can request to reserve time for the currently selected patient. The electronic request does not schedule appointments, instead the appointment requests are reviewed and allocated by an appointed staff member.

▼To submit an appointment request:

1. Go to the patient selection list.

   Alternatively, go to the patient list.

2. Right-click anywhere in the selected list to display the pop-up menu.

3. Click Appt Request.
axiUm displays the New Appointment Request window.

4. Go to the Provider field and click (ellipsis).

    axiUm displays the Providers List window.

5. Search for the provider by entering the search criteria.

6. Double-click an item. For our example, we will double-click on David Caan.

    axiUm selects the name, closes the Provider List window, and returns to the New Appointment Request window. The selected provider's name is displayed in the Provider field.

7. From the Clinic drop-down field, select a clinic. For our example, we will select Main Clinic.

8. Go to the Instructor field and click (ellipsis).

    axiUm displays the Instructor List window.
9. Search for the instructor by entering the search criteria. For our example, all instructors in axiUm are displayed for us.

10. Double-click an item. For our example, we will double-click on Karina Nicoletti.

axiUm selects the name, closes the Instructor List window, and returns to the New Appointment Request window. The selected instructor’s name is displayed in the Instructor field.

11. Enter the system-required fields and options provided.

12. Click Save.

axiUm saves the information and closes the New Appointment Request window.

You have now successfully submitted an appointment request.

5 Submitting Chart Requests

Using chart request prevents more than one person taking the same patient chart (paper chart, not electronic chart) at the same time. There are two types of chart requests, automatic and manual.

Automatic

axiUm submits automatic paper chart requests when a user schedules an appointment and the patient has a paper chart. This way the users can be certain to have access to a particular patient’s paper chart on the scheduled day.
Manual

Users submit manual chart requests when they require a patient's paper chart other than for the day of the patient's appointment, or the patient has both electronic and paper charts and the user wants the paper version.

▼ To submit a chart request:

1. Go to the patient selection list.

   Alternatively, go to the patient list.

2. Highlight a patient’s name.

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

4. Click Chart Request.

   If the patient has an electronic chart, axiUm displays a message box.

5. Click Yes. For our example, we do not need the electronic chart.
axiUm displays the Request Chart-Out window.

6. Go to the **User** field and click (ellipsis).

axiUm displays the Users List window.

7. Enter your search criteria. For our example, we will search for the provider David Caan.

8. Click (Close).

axiUm saves your selection, closes the Users List window, and returns to the Request Chart-Out window.

9. Enter the fields provided. For our example, we will overwrite the defaults and enter:
   - **Location**: DS Dental School
Using the Dispensary Request

- Date Out: 11/05/2008
- Time Out: 11:30 AM
- Days: 0
- Hours: 2

If another user has already made a chart request for the same date/time period, the program displays an error.

10. Click OK.

axiUm saves your entries and closes the Request Chart-Out window,

You have now successfully requested a paper chart.

A staff in charge of chart allocations must ensure that the user receives the chart on the specified date and time.

The chart request is accessible in the Chart Tracker module. For more information, see the axiUm User Guide for the Chart Tracker module.

6 Using the Dispensary Request

The Dispensary Request is for the provider to request equipment for treatment purposes. Automatic requests for the dispensary items are made when an appointment is scheduled and the treatment indicated, but there are other times that the provider may need to make a manual request (e.g., treatment changes).

This section covers the following topics:

- Opening the Dispensary Request window
- The Dispensary Request window
- Submitting a dispensary request
• Using dispensary templates

6.1 Opening the Dispensary Request Window

▼To open the Dispensary Request window:

1. Go to the patient selection list.
   Alternatively, go to the patient list.

2. Highlight a patient’s name.

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

4. Click Dispensary Request.

  axiUm displays the Dispensary Request window.

  The next section describes the Dispensary Request window.
6.2 The Dispensary Request Window

This is how the Dependents window may look when you open it.

Use this window for:

- Submitting a dispensary request
- Using dispensary templates

The following sections will explain the procedures for these tasks.

6.3 Submitting a Dispensary Request

This section covers the following topics:

- Adding items to the dispensary request
- Deleting items from the dispensary request

Adding Items to the Dispensary Request

You can create dispensary request by manually adding individual items. This section provides instructions on adding items manually.

You can also load dispensary templates that contain set items. For instructions on using dispensary templates, see Using Dispensary Templates on page 180.
To submit a dispensary request:

1. Open the Dispensary Request window.
   
   For instructions on opening the Dispensary Request window, see *Opening the Dispensary Request Window* on page 174.

2. From the Dispensary drop-down field, select the dispensary location. For our example, we will select DISP5, 5th Floor Dispensary.

3. Go to the Provider field and click the ellipsis.

   axiUm displays the Providers List window.

4. Enter your search criteria. For our example, we will search for the provider David Caan.

5. Highlight the provider’s name and click Close (Close).

   Alternatively, double-click on the provider’s name.

   axiUm closes the Providers List window.

   axiUm saves your selection, closes the Providers List window, and returns to the Dispensary Request window.
6. Enter the fields. For our example, we will enter the following:
   - **Date Out:** 16/05/2011
   - **Time Out:** 8:00AM
   - **Item Type:** Sundry

7. Go to the Code field and click (ellipsis).
   axiUm displays the Sundry List window.

8. Browse to the item or enter your search criteria. For our example, we will browse for the item **3001. Sml Latex Gloves**.

9. Click (Close).
   axiUm closes the Sundry List window.
axiUm saves your selection, closes the Sundry List window, and returns to the Dispensary Request window.

10. Click ![Add a new Record](Add a new Record). axiUm adds the item to the list view and assigns an order number for the request.

11. Click **OK**. axiUm displays a message box.

12. Click **No**. For our example, we will not need a printout.
You have now successfully submitted a dispensary request for this patient record.

The dispensary request is accessible in the Dispensary module. For more information, see the axiUm User Guide for the Dispensary module.

Deleting Items from the Dispensary Request

▼To delete an item from the dispensary request:

1. Open the **Dispensary Request** window.

   For instructions on opening the Dispensary Request window, see *Opening the Dispensary Request Window* on page 174.

2. Highlight an item from the list view. In our example, we will select the item code 3001, Sml Latex Gloves.

   ![Dispensary Request Window](image)

3. Click ![Delete Record](image)

   axiUm displays a message box.

4. Click **Yes**.
axiUm deletes the item from the Dispensary Request window.

You have now successfully deleted a dispensary request for this patient record.

### 6.4 Using Dispensary Templates

This section covers the following topics:

- Opening the Dispensary Template List window
- Creating dispensary templates
- Modifying dispensary templates
- Loading dispensary templates
- Deleting dispensary templates
- Previewing dispensary templates
- Printing dispensary templates

#### Opening the Dispensary Template List Window

**To open the Dispensary Template List window:**

1. Open the **Dispensary Request** window.
   
   For instructions on opening the Dispensary Request window, see *Opening the Dispensary Request Window* on page 174.

2. There are minimum field requirements before you can open the Dispensary Template List window. In our example, we will enter the following:
• **Dispensary**: DISP2, 2nd Floor Dispensary
• **Provider**: David Caan

3. **Click Load...**

axiUm displays the Dispensary Template List window.

You have now successfully opened the Dispensary Template List window.

Use this window for:

• Creating dispensary templates
• Modifying dispensary templates
• Loading dispensary templates
• Deleting dispensary templates
• Previewing dispensary templates
• Printing dispensary templates

The following sections will explain the procedures for these tasks.

**Creating Dispensary Templates**

⚠️ **To create a dispensary template:**

1. **Open the Dispensary Template List window.**

   For instructions on opening the Dispensary Template List window, see *Opening the Dispensary Template List Window* on page 180.

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

3. Enter the fields. For our example, we will enter:
   - Code: 001
   - Description: Basic Kit

4. Click (Add a new Record).

   axiUm adds the new record to the list view.

   ![Dispensary Template List](image)

You have now successfully created a dispensary template. If you followed this example, the template is empty. You must add items to the template. For instructions on adding items to the template, see *Adding Items to Dispensary Templates* on page 184.

**Modifying Dispensary Templates**

Use the Edit Dispensary Template window to add, modify, and delete items from templates.

This section covers the following topics:

- Opening the Edit Dispensary Template window
- The Edit Dispensary Template window
- Adding items to dispensary templates
- Modifying items on dispensary templates
- Deleting items from dispensary templates
Opening the Edit Dispensary Template Window

To open the Edit Dispensary Template window:

1. Open the Dispensary Template List window.

   For instructions on opening the Dispensary Template List window, see Opening the Dispensary Template List Window on page 180.

2. From the list view, highlight an item.

3. Click (Edit Dispensary Template)

   Alternatively, double-click the item.

   axiUm displays the Edit Dispensary Template window.

The next section describes the Edit Dispensary Template window.

The Edit Dispensary Template Window

This is how the Edit Dispensary window may look when you open it.

Use this window for:

- Adding items to dispensary templates
- Modifying items on dispensary templates
- Deleting items from dispensary templates

The following sections will explain the procedures for these tasks.
Adding Items to Dispensary Templates

For our example, we will use the template Basic Kit we created earlier. In the following procedure, we will do the following:

- Add a sundry item: Amalgabond Plus
- Add a kit item: Dispenser Gun

▼ To add items to the dispensary template:

1. Open the Edit Dispensary Template window.

   For instructions on opening the Edit Dispensary Template window, see *Opening the Edit Dispensary Template Window* on page 183.

2. From the Item Type drop-down field, select Sundry. In our example, this is selected for us.

3. Go to the Code field and click (ellipsis).

   axiUm displays the Sundry List window. For information on the Sundry List window, refer to the axiUm Reference Manual for Maintenance and see *Sundry List Window* on page 119.

4. From the list view, highlight an item. For our example, we will select AMABON, Amalgabond Plus.

5. Click (Close).

   Alternatively, double-click on the item.

   axiUm saves the selection, closes the Sundry List window, and returns to the Edit Dispensary Template window.
axiUm also displays the selected item type and code.

6. Click (Add a new Record).

axiUm adds the new record to the list view.

7. Click (Clear Data).

axiUm clears the fields.

8. From the **Item Type** drop-down field, select **Kit**. In our example, this is selected for us.

9. Go to the **Code** field and click (ellipsis).
axiUm displays the Kit Type Codes window. For information on the Kit Type Codes window, refer to the axiUm Reference Manual for Maintenance and see *Kit Type Codes Window* on page 103.

10. From the list view, highlight an item. For our example, we will select **CPRM**, Crown Remover.

11. Click ✗ (Close).

   Alternatively, double-click on the item.

axiUm saves the selection, closes the Sundry List window, and returns to the Edit Dispensary Template window.

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

![Edit Dispensary Template](image)

13. Click (Modify Record).

axiUm saves the changes.

You have now successfully added items to a dispensary template. The Basic Kit template now contains:

- Add a sundry item: Amalgabond Plus
- Add a kit item: Dispenser Gun

Modifying Items on Dispensary Templates

For our example, we will take the Basic Kit template we created earlier. In the following procedure, we will change the sundry item Amalgabond Plus to a kit, Curing Light.

▼To modify items on the dispensary template:

1. Open the **Edit Dispensary Template** window.

   For instructions on opening the Edit Dispensary Template window, see *Opening the Edit Dispensary Template Window* on page 183.
2. From the list view, highlight an item. For our example, we will select AMABON, Amalgabond Plus.

![Image of Dispenser Template](image)

3. From the Item Type drop-down field, select Sundry.

4. Go to the Code field and click (ellipsis).

   axiUm displays the Sundry List window. For information on the Sundry List window, refer to the axiUm Reference Manual for Maintenance and see Sundry List Window on page 119.

![Image of Sundry List](image)

5. From the list view, highlight an item. For our example, we will select BONTRP, Bone Trap Screen.

6. Click (Close).

   Alternatively, double-click on the item.
axiUm saves the selection, closes the Sundry List window, and returns to the Edit Dispensary Template window.

7. Click (Modify Record).

axiUm replaces the old item (AMABON, Amalgabond Plus) with the new item (LGHT, Curing Light), and saves the changes.

You have now successfully modified the dispensary template.

The Basic Kit template now contains Curing Light instead of Amalgabond Plus.

Deleting Items from Dispensary Templates

For our example, we will take the Basic Kit template we created earlier. In the following procedure, we will delete the kit Dispenser Gun.
To delete an item from the dispensary template:

1. Open the **Edit Dispensary Template** window.

   For instructions on opening the Edit Dispensary Template window, see *Opening the Edit Dispensary Template Window* on page 183.

2. From the list view, highlight an item. For our example, we will select **DGUN**, Dispenser Gun.

   ![Edit Dispensary Template window](image)

3. Click ![Delete Record](image) (Delete Record).

   axiUm displays a message box.

   ![Message box](image)

4. Click **Yes**.
axiUm deletes the item from the list view.

You have now successfully deleted an item from the dispensary template.

In our example, we deleted the kit Dispenser Gun.

**Loading Dispensary Templates**

**To load a dispensary template:**

1. Open the Dispensary Template List window.

   For instructions on opening the Dispensary Template List window, see *Opening the Dispensary Template List Window* on page 180.

2. Click **Load**.

   axiUm displays the Dispensary Template List window.

3. From the list view, highlight an item. For our example, we will select **Basic Kit**.

4. Click **X** (Close).

   Alternatively, double-click on the item.
axiUm applies your selection, closes the Dispensary Template List window, and returns to the Dispensary Request window.

axiUm displays the details of the selected dispensary template.

5. Click **OK**.

   axiUm displays the following message box.

   ![Message Box](image)

   *You can load multiple templates in a single dispensary request.*

6. Click **No**. For our example, we will not need to print the dispensary request.

   axiUm closes the Dispensary Request window.

You have now successfully loaded a dispensary form and submitted it.
Deleting Dispensary Templates

To delete a dispensary template:

1. Open the Dispensary Template List window.

   For instructions on opening the Dispensary Template List window, see Opening the Dispensary Template List Window on page 180.

2. From the list view, highlight an item.

3. Click (Delete Record).

   axiUm displays a message box.

   ![Message Box]

   Click Yes.

   axiUm deletes the item from the list view.

   You have now successfully deleted a dispensary template.

Previewing Dispensary Templates

To preview a dispensary template:

1. Open the Dispensary Template List window.

   For instructions on opening the Dispensary Template List window, see Opening the Dispensary Template List Window on page 180.

2. From the list view, highlight an item.

3. Click (Preview Report).
axiUm displays the Dispensary Templates report. This report displays all sundry and kit items in the template.

You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.

4. Click (Close).

axiUm closes the Dispensary Templates report and returns to the Dispensary Template List window.

You have now successfully previewed the contact notes in a patient record.

**Printing Dispensary Templates**

▼To print a dispensary template:

1. Open the **Dispensary Template List** window.

   For instructions on opening the Dispensary Template List window, see *Opening the Dispensary Template List Window* on page 180.

2. From the list view, highlight an item.

3. Click **(Print Report)**.
axiUm displays the Select Printer window.

4. Highlight an item. This is the printer you want to print to.

💡 You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

5. Click Select.

axiUm prints the report to the selected printer.

You have now successfully printed the contact notes in a patient record.

7 Using Patient-Provider Assignments

You can assign specific providers to specific patients. By providers they can be providers (e.g. students), managers (e.g., supervising clerical staff), or faculty members. You can assign an unlimited number of providers for each patient. The benefit to this is that there is no need to review patient needs and provider requests beforehand.

This section covers the following topics:

- Using provider assignments
- Using provider assignment EPR forms
- Using manager assignments
- Using faculty assignments
- Assigning multiple providers for patients
7.1 Using Provider Assignments

This section covers the following topics:

- Opening the Provider Assignments window
- The Provider Assignments window
- Assigning providers to patients
- Viewing current provider assignments
- Viewing deleted provider assignments
- Viewing past provider assignments
- Viewing provider assignment activity history
- Unassigning providers from patients

Opening the Provider Assignments Window

Administrative personnel or provider group managers generally perform this task.

There are different methods to opening the Provider Assignments windows:

- Rolodex module
- Patient Info window

This section covers the different methods. We will use our Jane Doe example.

▼To open the Provider Assignments windows using the Rolodex module:

1. Search for a patient.
   
   For instructions on searching patients, see Searching Patient Files on page 11.

2. Go to the patient selection list.
   
   Alternatively, go to the patient list.

3. Highlight a patient’s name.
4. Right-click to display a list of options.

![Right-click options menu]

5. Click **Provider Assignments**.

axiUm displays the Provider Assignments window.

▶ **To open the Provider Assignments windows using the Patient Info window:**

1. Open the **Patient Info** window.

   For instructions on opening the Patient Card window, see *Viewing Patient Records on the Patient Info Window* on page 16.

2. Click on the **Personal** tab.

3. Go to the **Assignment** section.

4. Click **Providers...**

   axiUm displays the Provider Assignments window.

The next section describes the Provider Assignments window.
The Provider Assignments Window

This is how the Provider Assignments window may look when you open it.

Use this window for:

- Assigning providers to patients
- Viewing current provider assignments
- Viewing deleted provider assignments
- Viewing past provider assignments
- Viewing provider assignment activity history
- Unassigning providers from patients

The following sections will explain the procedures for these tasks.

For instructions on assigning multiple providers for patients, see *Assigning Multiple Providers for Patients* on page 225.

**Assigning Providers to Patients**

For our example, we will assign provider David Caan to Jane Doe’s patient record.

▼ **To assign a provider to a patient:**

1. Open the **Provider Assignments** window.

   For instructions on opening the Provider Assignments window, see *Opening the Manager Assignments Window* on page 210.
2. Go to the **Provider** field and click  
   (ellipsis).

   axiUm displays the Providers List window.

3. Search for the provider by entering the search criteria. For our example, go to the **Criteria** field and enter  
   caan.

   axiUm displays David Caan’s name.

4. Highlight the provider’s name and click  
   (Close).

   Alternatively, double-click on the provider’s name.

   axiUm selects the provider’s name, closes the Providers List window, and returns to the Provider Assignments window. In our example, the selected provider’s ID is displayed in the Provider field.

5. Enter the fields and options.
6. Click (Add a new Record).

axiUm adds the new record to the list view.

7. Click (Close).
axiUm saves the provider assignment, closes the Provider Assignments window, and returns to the Patient Info window. axiUm displays the assigned provider in the Patient Info window’s Personal tab, and also in the Patient Card window.

You have now successfully assigned a provider to a patient.

Viewing Current Provider Assignments

▼To view current provider assignments:

Open the Provider Assignments window.

For instructions on opening the Provider Assignments window, see Opening the Manager Assignments Window on page 210.

Viewing Deleted Provider Assignments

For our example, we will use Jane Doe’s patient record.
▼To view deleted provider assignments:

1. Open the **Provider Assignments** window.

   For instructions on opening the Provider Assignments window, see *Opening the Manager Assignments Window* on page 210.

2. Select the **Show Deleted** checkbox.

   axiUUm displays the deleted provider assignment in gray.

You have now successfully viewed deleted provider assignments in a patient record.

**Viewing Past Provider Assignments**

axiUUm saves all provider assignments that have expired their assignment date so you can view them later on.

▼To view past provider assignments:

1. Open the **Provider Assignments** window.

   For instructions on opening the Provider Assignments window, see *Opening the Manager Assignments Window* on page 210.

2. Select the **Show Past** checkbox.

   axiUUm displays the past provider assignment in gray.
You have now successfully viewed past provider assignments in a patient record.

**Viewing Provider Assignment Activity History**

axiUm retains a historic record of all changes made to each patient-provider assignment record. The historic records contain:

- Provider #
- Patient name
- Start and end date of the assignment term
- User name of the person who made the changes
- Date and time of change
- Information from the Dependents window for comparing changes

For our example, we will use Jane Doe’s patient record. We will also use the provider David Caan.

▼To view activity history of provider assignments:

1. Open the **Provider Assignments** window.

   For instructions on opening the Provider Assignments window, see *Opening the Manager Assignments Window* on page 210.

2. From the list view, highlight a provider’s name. For our example, we will select David Caan.

3. Click **(Show History)**.

   axiUm displays the Provider Assignments History window.
4. From the list view, highlight an item.

axiUm displays details of the patient-provider assignment record.

![Provider Assignments History](image)

You have now successfully opened and displayed a provider assignment history.

**Unassigning Providers from Patients**

▼ To unassign a provider from a patient:

1. Open the **Provider Assignments** window.

   For instructions on opening the Provider Assignments window, see *Opening the Manager Assignments Window* on page 210.

2. Highlight a provider’s name. For our example, we will select **David Caan**.
Note that this provider is the primary provider in a list of multiple providers.

3. Click (Delete Record).

axiUm displays a message box.

4. Click Yes.
axiUm deletes the item from the list box.

When you delete the primary provider, axiUm does not automatically assign it to the sole remaining provider. If you want to indicate this provider as the primary provider, you must manually indicate it.

5. Click (Close).

axiUm saves the deletion, closes the Provider Assignment window, and returns to the Patient Info window. axiUm displays the other provider in the Patient Info window’s Personal tab, and also in the Patient Card window.

You have now successfully unassigned a provider from a patient.

7.2 Using Provider Assignment EPR Forms

This section covers the following topics:

- Opening Provider Assignment EPR Forms window
- Answering provider assignment EPR forms
- Adding EPR forms
- Viewing EPR form activity history
- Printing EPR forms
• Selecting different forms

Opening Provider Assignment EPR Forms Window

▼ To open the Provider Assignment EPR Forms window:

1. Open the Provider Assignments window.

   For instructions on opening the Provider Assignments window, see Opening the Manager Assignments Window on page 210.

2. From the list view, highlight a provider’s name. For our example, we will select David Caan.

3. Click (EPR Forms).

   axiUm displays the Add EPR Form window.

4. From the Form drop-down field, select a form name.

5. Click OK.

   axiUm displays the Provider Assignment EPR Forms window.

Answering Provider Assignment EPR Forms

▼ To answer questions in the Provider Assignment EPR Forms:

1. Open the Provider Assignment EPR Forms window.

   For instructions on opening the Provider Assignment EPR Forms window, see Opening Provider Assignment EPR Forms Window on page 207.

2. Answer the questions on the form.

   ![You may require faculty approval.]

Adding EPR Forms

▼To create a different form when you’re done with the current one:

1. Open the Provider Assignment EPR Forms window.

   For instructions on opening the Provider Assignment EPR Forms window, see Opening Provider Assignment EPR Forms Window on page 207.

2. Click (Create New Form).

   axiUm displays the Add EPR Form window.

3. From the Form drop-down field, select a form name.

4. Click OK.

   axiUm displays the selected form in the Provider Assignment EPR Forms window.

Viewing EPR Form Activity History

▼To view the activity history of an EPR Form:

1. Open the Provider Assignment EPR Forms window.

   For instructions on opening the Provider Assignment EPR Forms window, see Opening Provider Assignment EPR Forms Window on page 207.

2. Click (View Form History).

   axiUm displays the Select Form History window.

3. From the list view, highlight an item.

4. Click OK.

   Alternatively, double-click on the item.

Printing EPR Forms

▼To print an EPR Form:

1. Open the Provider Assignment EPR Forms window.

   For instructions on opening the Provider Assignment EPR Forms window, see Opening Provider Assignment EPR Forms Window on page 207.
2. Click \( \text{Print Form Report} \).

axiUm displays the Print EPR Form window.

3. Enter the fields and select from the fields.

4. Select one of the following:
   
   - Preview: Displays the Provider Assignment Form report
   - Print: Print to selected printer

**Selecting Different Forms**

\( \text{To select a different form:} \)

1. Open the Provider Assignment EPR Forms window.

   For instructions on opening the Provider Assignment EPR Forms window, see *Opening Provider Assignment EPR Forms Window* on page 207.

2. Click \( \text{Select Forms} \).

   axiUm displays the Select Form window.

3. From the list view, highlight an item.

4. Click **OK**.

   Alternatively, double-click the item.

   axiUm saves your selection, closes the Select EPR Form, and returns to the Provider Assignment EPR Forms window.

### 7.3 Using Manager Assignments

This section covers the following topics:

- Opening the Manager Assignments window
- The Manager Assignments window
- Assigning managers to patients
- Viewing current manager assignments
- Viewing deleted manager assignments
- Viewing manager assignment activity history
- Unassigning managers from patients
Opening the Manager Assignments Window

The following instructions show how to open the Manager Assignments windows.

There are different methods to access the Manager Assignments windows:

- Rolodex module
- Patient Info window

This section covers the different methods. We will use our Jane Doe example.

▼To open the Manager Assignments windows using the Rolodex module:

1. Search for a patient.
   
   For instructions on searching patients, see Searching Patient Files on page 11.

2. Go to the patient selection list.
   
   Alternatively, go to the patient list.

3. Highlight a patient’s name.

4. Right-click to display a list of options.
5. Click Manager Assignments.

axiUm displays the Manager Assignments window.

▼To open the Manager Assignments windows using the Patient Info window:

1. Open the Patient Info window.

   For instructions on opening the Patient Card window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Personal tab.

3. Go to the Assignment section.

4. Click Managers....

   axiUm displays the Manager Assignments window.

The next section describes the Manager Assignments window.

The Manager Assignments Window

This is how the Manager Assignments window may look when you open it.

Use this window for:

- Assigning managers to patients
- Viewing current manager assignments
- Viewing deleted manager assignments
- Viewing manager assignment activity history
- Unassigning managers from patients

The following sections will explain the procedures for these tasks.
For instructions on assigning multiple managers for patients, see Assigning Multiple Providers for Patients on page 225.

Assigning Managers to Patients

Because managers are clerical staff, they are not providers and therefore do not treat patients. They only supervise providers who are treating patients.

For our example, we will assign manager Dave Tory to Jane Doe’s patient record.

▼ To assign a manager to a patient:

1. Open the Manager Assignments window.

   For instructions on opening the Manager Assignments window, see Opening the Manager Assignments Window on page 210.

2. Go to the User field and click (ellipsis).

   axiUm displays the Users List window.

3. Search for the provider by entering the search criteria. For our example, go to the Criteria field and enter tory.

   axiUm displays Dave Tory’s name.

4. Highlight the manager’s name and click (Close).
Alternatively, double-click on the manager’s name.

axiUm selects the manager’s name, closes the Users List window, and returns to the Manager Assignments window. In our example, the selected manager’s ID is displayed in the User field.

5. Click **(Add a new Record)**.

axiUm adds the new record to the list view.

6. Click **(Close)**.

axiUm saves the manager assignment, closes the Manager Assignments window, and returns to the Patient Info window.

You have now successfully assigned a manager to a patient.

**Viewing Current Manager Assignments**

**To view current manager assignments:**

Open the Manager Assignments window.

For instructions on opening the Manager Assignments window, see *Opening the Manager Assignments Window* on page 210.
Viewing Deleted Manager Assignments

For our example, we will use Jane Doe’s patient record.

▼To view deleted manager assignments:

1. Open the Manager Assignments window.

   For instructions on opening the Manager Assignments window, see Opening the Manager Assignments Window on page 210.

2. Select the Show Deleted checkbox.

   axiUm displays the deleted manager assignment in gray.

You have now successfully viewed deleted manager assignments in a patient record.

Viewing Manager Assignment Activity History

axiUm retains a historic record of all changes made to each manager-provider assignment record. The historic records contain:

- Manager’s user ID
- Manager name
- Type of action
- User name of the person who made the changes
- Date and time of change

For our example, we will use Jane Doe’s patient record. We will also use the manager Dave Tory.
To view activity history of manager assignments:

1. Open the **Manager Assignments** window.

   For instructions on opening the Manager Assignments window, see *Opening the Manager Assignments Window* on page 210.

2. From the list view, highlight a provider’s name. For our example, we will select **Dave Tory**.

3. Click 📋 *(Show History)*.

   axiUm displays the Provider Assignments History window.

4. From the list view, highlight an item.

   axiUm displays details of the manager-provider assignment record.

You have now successfully opened and displayed a manager assignment history.
Unassigning Managers from Patients

▼To unassign a manager from a patient:

1. Open the Manager Assignments window.

   For instructions on opening the Manager Assignments window, see Opening the Manager Assignments Window on page 210.

2. Highlight a manager’s name. For our example, we will select Dave Tory.

3. Click the (Delete Record).

   axiUm displays a message box.

4. Click Yes.

   axiUm deletes the item from the list box.
5. Click \( \text{X} \) (Close).

axiUm saves the deletion, closes the Manager Assignment window, and returns to the Patient Info window.

You have now successfully unassigned a manager from a patient.

### 7.4 Using Faculty Assignments

This section covers the following topics:

- Opening the Faculty Assignments window
- The Faculty Assignments window
- Assigning faculty to patients
- Viewing current faculty assignments
- Viewing deleted faculty assignments
- Viewing faculty assignment activity history
- Unassigning faculty from patients

#### Opening the Faculty Assignments Window

The following instructions show how to open the Faculty Assignments windows.

There are different methods to access the Faculty Assignments windows:

- Rolodex module
- Patient Info window

This section covers the different methods. We will use our Jane Doe example.

**To open the Faculty Assignments windows using the Rolodex module:**

1. Search for a patient.
   
   For instructions on searching patients, see *Searching Patient Files* on page 11.

2. Go to the patient selection list.
   
   Alternatively, go to the patient list.
3. Highlight a patient’s name.

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

5. Click Faculty Assignments.

   axiUm displays the Faculty Assignments window.

▼To open the Faculty Assignments windows using the Patient Info window:

1. Open the Patient Info window.

   For instructions on opening the Patient Card window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click on the Personal tab.

3. Go to the Assignment section.

4. Click Faculty....

   axiUm displays the Faculty Assignments window.

For information on the Faculty Assignments window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Faculty Assignments Window on page 35.
The Faculty Assignments Window

This is how the Faculty Assignments window may look when you open it.

Use this window for:

• Assigning faculty to patients
• Viewing current faculty assignments
• Viewing deleted faculty assignments
• Viewing faculty assignment activity history
• Unassigning faculty from patients

The following sections will explain the procedures for these tasks.

For instructions on assigning multiple faculty members for patients, see Assigning Multiple Providers for Patients on page 225.

Assigning Faculty to Patients

For our example, we will assign faculty member Gary Bennett to Jane Doe’s patient record.

▼To assign a faculty member to a patient:

1. Open the Faculty Assignments window.

   For instructions on opening the Faculty Assignments window, see Opening the Faculty Assignments Window on page 217.

2. Go to the Faculty User field and click (ellipsis).
axiUm displays the Users List window.

3. Search for the provider by entering the search criteria. For our example, go to the Criteria field and enter bennett.

axiUm displays Gary Bennett’s name.

4. Highlight the faculty member’s name and click (Close).

Alternatively, double-click on the faculty member’s name.

axiUm selects the faculty member’s name, closes the Users List window, and returns to the Faculty Assignments window. In our example, the selected faculty member’s ID is displayed in the User field.

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

![Faculty Assignments window](image)

6. Click (Close).

axiUm saves the faculty assignment, closes the Faculty Assignments window, and returns to the Patient Info window.

You have now successfully assigned a faculty member to a patient.

**Viewing Current Faculty Assignments**

- **To view current faculty assignments:**
  
  Open the Faculty Assignments window.

  For instructions on opening the Faculty Assignments window, see *Opening the Faculty Assignments Window* on page 217.

**Viewing Deleted Faculty Assignments**

For our example, we will use Jane Doe’s patient record.

- **To view deleted faculty assignments:**
  
  1. Open the Faculty Assignments window.

     For instructions on opening the Faculty Assignments window, see *Opening the Faculty Assignments Window* on page 217.

  2. Select the Show Deleted checkbox.
axiUm displays the deleted faculty assignment in gray.

You have now successfully viewed deleted faculty assignments from a patient record.

**Viewing Faculty Assignment Activity History**

axiUm retains a historic record of all changes made to each faculty-provider assignment record. The historic records contain:

- Manager’s information
- Type of action
- User name of the person who made the changes
- Date and time of change

For our example, we will use Jane Doe’s patient record. We will also use the faculty member Gary Bennett.

▼To view activity history of faculty assignments:

1. Open the **Faculty Assignments** window.

   For instructions on opening the Faculty Assignments window, see *Opening the Faculty Assignments Window* on page 217.

2. From the list view, highlight a provider’s name. For our example, we will select Gary Bennett.

3. Click ![Show History](Show History).
axiUm displays the Faculty Assignments History window.

4. From the list view, highlight an item.

axiUm displays details of the faculty-provider assignment record.

You have now successfully opened and displayed a faculty assignment history.

Unassigning Faculty from Patients

▼To unassign a faculty member from a patient:

1. Open the Faculty Assignments window.

   For instructions on opening the Faculty Assignments window, see Opening the Faculty Assignments Window on page 217.
2. Highlight a manager’s name. For our example, we will select Gary Bennett.

3. Click (Delete Record).

axiUm displays a message box.

4. Click Yes.

axiUm deletes the item from the list box.

5. Click (Close).

axiUm saves the deletion, closes the Faculty Assignment window, and returns to the Patient Info window.

You have now successfully unassigned a faculty assignment from a patient record.
7.5 Assigning Multiple Providers for Patients

For our example, we will assign two providers. Then we will indicate one as the primary provider.

To assign multiple providers to a patient record:

1. Add two providers. For our example, we will add David Caan and Terry Gates.

   For instructions on assigning providers, see Assigning Providers to Patients on page 198.

2. In the assignments window, highlight the provider that you want to assign as the primary provider. For our example, we will select David Caan.

   axiUm displays the details of the selected provider in the fields and options.

3. Select the Is Primary checkbox.

4. Click (Modify Record).
axiUm saves the changes and indicates in the list view that the provider is now a primary provider for this patient.

5. Click (Close).

axiUm saves the provider assignment, closes the assignment window, and returns to the Patient Info window. axiUm displays the assigned providers in the Patient Info window’s Personal tab, and also in the Patient Card window. When multiple providers
are assigned to a patient, only the primary provider is displayed in the Patient Info window.

You have now successfully assigned multiple providers to a patient record. You also indicated one as the primary provider.

You can mix the different provider types (providers, managers, faculty) when adding multiple providers. However, only providers display in the Patient Info window.

8 Using Treatment-Provider Assignments

When assignment is restricted to specific treatments use the Assign Treatments window to assign providers to specific treatments.

This section covers the following topics:

• Assigning treatments to providers
• Unassigning treatments from providers
8.1 Assigning Treatments to Providers

▼To assign treatments to providers:

1. Open the Provider Assignments window.

   For instructions on opening the Provider Assignments window, see Opening the Manager Assignments Window on page 210.

2. From the list view, highlight a provider’s name. For our example, we will select David Caan.

3. Click (Assign Treatments).

   Alternatively, double-click on the provider’s name.

   axiUm displays the Assign Treatments window.

4. From the Treatments (Not Assigned to) list view, highlight an item

5. Click (right arrow).

   axiUm moves the provider’s name to the Treatments (Assigned to) list view.

6. Click Close.

You have now successfully assigned a treatment to a provider.

The provider can modify specific treatments within the patient’s chart.

8.2 Unassigning Treatments from Providers

▼To unassign treatments from providers:

1. Open the Provider Assignments window.

   For instructions on opening the Provider Assignments window, see Opening the Manager Assignments Window on page 210.

2. From the list view, highlight a provider’s name. For our example, we will select David Caan.

3. Click (Assign Treatments).

   Alternatively, double-click on the provider’s name.
axiUm displays the Assign Treatments window.

4. From the Treatments (Assigned to) list view, highlight an item.
5. Click (left arrow).

   axiUm moves the provider’s name to the Treatments (Not Assigned to) list view.

6. Click Close.

You have now successfully unassigned a treatment from a provider.
INSURANCE & BENEFIT PLANS

This chapter covers procedures in the Rolodex / Patient Card module to manage insurance and benefit plans for the selected patient record.

Benefit plans are insurance coverages provided by the employer. If you have multiple patients with the same employer (and therefore on the same benefit plan), you can use the same benefit plan to apply to all these patient records.

This chapter covers the following topics:

• Opening the Insurance tab
• Using medical insurance
• Using billing sequence
• Linking insurance companies to benefit plans
• Using benefit plans
• Extending benefit plans to dependents

At the end of this chapter you will be familiar with these tasks.

1 Opening the Insurance Tab

▼To open the Insurance tab:

1. Open the Patient Info window.

   For instructions on opening the Patient Info window, see Viewing Patient Records on the Patient Info Window on page 16.

2. Click the Insurance tab.
You have now successfully opened the Patient Info window’s Insurance tab.

2 Using Medical Insurance

This section covers the following topics:

- Adding medical insurance information to patient records
- Viewing insurance information on patient records
- Modifying insurance information in patient records
- Deleting insurance information from patient records
- Previewing insurance information
- Printing insurance information
- Viewing insurance activity history

2.1 Adding Medical Insurance Information to Patient Records

There are different methods to associate patient records to medical insurance companies:

- automatically linking patient records to the employers’ insurance companies
- manually selecting insurance companies

This section covers the different methods.

Automatically Linking Insurance Companies

For instructions on automatically linking patient records to insurance companies that are used by the patient’s employer, see Linking Employers to Insurance Benefit Plans on page 148.

Manually Selecting Insurance Companies

However, sometimes the patient does not have insurance provided by their employer. For example, they are still in a probation period, the employer does not provide insurance, or the patient is self-employed. In this case, they may have purchased a personal insurance. You can manually enter the insurance information in the Patient Info window’s Insurance tab.
To add insurance information to a patient record:

1. Open the Patient Info window’s Insurance tab.

   For instructions on opening the Patient Info window’s Insurance tab, see Opening the Insurance Tab on page 231.

2. Go to the Insurance field and click (ellipsis).

   axiUm displays the Insurance Companies List window. For information on the Insurance Companies List window, refer to the axiUm Reference Manual for Maintenance and see Insurance Companies List Window on page 315.

3. Search for an insurance company name. For our example, we will search for United Concordia.

4. Highlight an insurance company name. For our example, we will select United Concordia.

5. Click (Close).

   Alternatively, double-click the item.

   axiUm saves your selection, closes the Insurance Companies List window, and returns to the Patient Info window.

6. Click (Add a new Record).
axiUm saves the entries and adds the insurance information to the list view. Because the benefit plan involves both the insurance company and the employer, they are both displayed.

axiUm also enables the Coverage button. Clicking this now opens the Benefit Plan Coverage window. Use the Benefit Plan Coverage window to adjust benefit plan details for this patient or for all patients on the same plan. For more information on adjusting benefit plan details, see Adjusting Benefit Plan Coverage Details on page 246.

If the patient has more than one employer, and therefore more than one benefit plan, you can enter additional benefit plans here.

7. Click Save.

axiUm saves the new benefit plan record.

You have now successfully added insurance information to a patient record.

2.2 Viewing Insurance Information on Patient Records

Viewing General Insurance Information

▼ To view general insurance information:

Display the Insurance tab.

For instructions on opening the Insurance tab, see Opening the Insurance Tab on page 231.

Viewing Deleted General Insurance Information

For our example, we will use John Doe’s patient record.

▼ To view deleted guarantor information:

1. Display the Insurance tab.

For instructions on opening the Insurance tab, see Opening the Insurance Tab on page 231.

2. Select the Show Deleted checkbox.
axiUm displays the deleted insurance information in gray.

![Deleted insurance information in gray.](image)

You have now successfully viewed deleted insurance information in a patient record.

**Viewing Detailed Insurance Information**

You can view detailed insurance information on a patient record on the Insurance Company window.

There are different methods to open the Insurance Company window:

- Clicking a button
- Double-clicking an item

This section covers the different methods.

▼ **To view detailed insurance information by clicking a button:**

1. Display the Insurance tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. Click Ins. Details.

   axiUm displays the Insurance Company window.

▼ **To view detailed insurance information by double-clicking an item:**

1. Display the Insurance tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. From the list view, double-click on an insurance information.
axiUm displays the Insurance Company window.

The next section describes the Insurance Company window.

**The Insurance Company Window**

This is how the Insurance Company window may look when you open it.

For information on the Insurance Company window, refer to the axiUm Reference Manual for Maintenance and see Insurance Company Window on page 317.

**Viewing Detailed Trojan Information**

\( \text{\textbullet} \) To view detailed trojan information:

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. Click **Trojan Details**.

   axiUm displays the Trojan Details window.
2.3 Modifying Insurance Information in Patient Records

For information and instructions on modifying benefit plan details, see *Adjusting Benefit Plan Coverage Details* on page 246.

2.4 Deleting Insurance Information from Patient Records

![Warning]

*If you delete insurance information from a patient record, it will also delete the same insurance information from the dependents’ patient records. Later if you add new insurance information to the patient record, axiUm adds the new insurance information to all the dependents’ patient records.*

**To delete insurance information from patient records:**

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. From the list view, select an item.

3. Click ![Delete Record](image). axiUm displays a message box.

4. Click **Yes**.

   axiUm deletes the insurance information from the list view.

5. Click **Save**.

   axiUm saves the deletion.

You have now successfully deleted insurance information from a patient record.
2.5 Previewing Insurance Information

To preview insurance information:

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. Click **Preview Report**.

   axiUm displays the Insurance Policy Information report. This report displays all insurance information details in the patient record.

   You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.

   ![Insurance Policy Information Report]

3. Click **Close**.

   axiUm closes the Insurance Policy Information report and returns to the Patient Info window.

   You have now successfully previewed an insurance information report in a patient record.
2.6 Printing Insurance Information

To print insurance information:

1. Display the **Insurance** tab.
   
   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. Click (Print Report).
   
   axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

   *You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.*

4. Click **Select**.
   
   axiUm prints the report to the selected printer.

   You have now successfully printed insurance information in a patient record.

2.7 Viewing Insurance Activity History

axiUm retains a historic record of all changes made to each insurance record. The historic records contain:

- Subscriber #
- Name of employee (patient name)
- Insurance company
- Name of employer
For our example, we will use Jane Doe’s patient record and her insurance company United Concordia.

**To view activity history of employer information:**

1. **Display the Insurance tab.**

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. **From the list view, highlight an employer.** For our example, we will select UNCON.

3. **Click (Show History).**

   axiUm displays the Patient Insurance History window.

4. **From the list view, highlight an item.**

   axiUm displays details of the insurance record.

   You have now successfully viewed insurance information history in a patient record.
3 Using Billing Sequence

This section covers the following topics:

- Prioritizing billing sequence
- Resetting billing sequence

3.1 Prioritizing Billing Sequence

If a patient record has more than one insurance company, you must set the order in which invoices are sent to the insurance companies, so that the invoice is processed in sequence. If you do not set the billing sequence, axiUm creates one based on an internal formula.

▼To prioritize the order of insurance billing:

1. Display the Insurance tab.
   
   For instructions on opening the Insurance tab, see Opening the Insurance Tab on page 231.

2. Click Bill Order...

   axiUm displays the Billing Order window.

3. Highlight an item. For our example, we will select the insurance company UNCON.

4. Use the ↑ and ↓ buttons to move the items up and down the list. For our example, we will click ↑ to move insurance company UNCON to the top of the list.
5. Click **Save**.

axiUm saves the changes.

6. Click **Close**.

axiUm closes the Billing Order window and returns to the Patient Info window.

You have now successfully prioritized the order of insurance billing for a patient record.

### 3.2 Resetting Billing Sequence

You can reset the order of insurance billing to the original order,

**To reset the billing order:**

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. Click **Bill Order...**

   axiUm displays the Billing Order window.

3. Click **Reset**.

   axiUm resets the list to the original order.

4. Click **Save**.

   axiUm saves the changes.

5. Click **Close**.

   axiUm closes the Billing Order window and returns to the Patient Info window.
You have now successfully reset the insurance billing order for a patient record.

4 Linking Insurance Companies to Benefit Plans

Sometimes a benefit plan may not be associated with the selected insurance. For example, you selected the insurance company, but no insurance details show up in the fields of the Insurance tab. When this happens, you can manually select a benefit plan and link it to the associated insurance company.

To link insurance companies to benefit plans:

1. Display an insurance benefit plan in a patient record.
   
   For instructions on viewing a benefit plan in a patient record, see Viewing Insurance Information on Patient Records on page 234.

2. Follow instructions for linking employers to insurance benefit plans.
   
   For instructions on linking employers to insurance benefit plans, see Linking Employers to Insurance Benefit Plans on page 148.

axiUm saves the information, closes the Policy Information window, and returns to the Patient Info window. axiUm displays the insurance details in the Patient Info window’s Insurance tab.
You have now successfully linked an insurance company to a benefit plan in a patient record.

5 Using Benefit Plans

This section covers the following topics:

- Viewing patients’ current benefit plan coverages
- Adjusting benefit plan coverage details
- Using benefit plan templates

5.1 Viewing Patients’ Current Benefit Plan Coverages

This section covers the following topics:

- Opening current benefit plan coverages
- The Benefit Plan Coverage window
- The Linked Coverage Template window

Opening Current Benefit Plan Coverages

To open the Benefit Plan Coverage window:

1. Display an insurance benefit plan in a patient record.

   For instructions on viewing a benefit plan in a patient record, see Viewing Insurance Information on Patient Records on page 234.

2. Click Coverage....

   axiUm displays one of the following windows:

   - Benefit Plan Coverage window
   - Linked Coverage Template window

   The following sections describe these windows.
The Benefit Plan Coverage Window

The Benefit Plan Coverage window displays details of the currently used benefit plan. If you do not have a benefit plan associated with the selected insurance company, this window will be blank. In this case, you must create a benefit plan coverage.

Use the Benefit Plan Coverage window to add or adjust benefit plan coverage details. For instructions on adjusting benefit plan coverage details, see Adjusting Benefit Plan Coverage Details on page 246.
The Linked Coverage Template Window

The Linked Coverage Template window displays details of the currently used benefit plan template. If the patient record is not using a template, this window will be blank.

Use the Linked Coverage Template window to:

- Copy current linked coverage templates. For instructions on copying coverage templates, see *Copying Benefit Plan Coverage Details* on page 256.
- Use benefit plan coverage templates. For instructions on using benefit plan coverage templates, see *Using Benefit Plan Templates* on page 257.

### 5.2 Adjusting Benefit Plan Coverage Details

You can change the benefit plan for a single patient, or for all patients using that benefit plan.

Often if a patient’s benefit plan changes, all other patients using that benefit plan (i.e. all other patients working for the same employer) will also change. Use the Benefit Plan Coverage window to change the details of either a single patient or all patients using that benefit plan.

This section covers the following topics:

- Creating additional benefit plan coverage details
- Modifying benefit plan coverage details
- Deleting benefit plan coverage details
• Previewing benefit plan coverage details
• Printing benefit plan coverage details
• Copying benefit plan coverage details

Creating Additional Benefit Plan Coverage Details

If you want to add a benefit plan that is similar to an existing one, you can copy the details of an existing one, and make changes to it for the selected patient. For instructions on copying benefit plans, see Copying Benefit Plan Coverage Details on page 256.

If you want to use a benefit plan that already exists, you can use an existing benefit plan coverage template. For information and instructions on using benefit plan coverage templates, see Using Benefit Plan Templates on page 257.

▼To create additional benefit plan details:

1. Open the Patient Info window’s Insurance tab.

   For instructions on opening the Patient Info window’s Insurance tab, see Opening the Insurance Tab on page 231.

2. From the list view, highlight an item. For our example, we will select Jane Doe’s insurance.

<table>
<thead>
<tr>
<th>Subscriber ID</th>
<th>Name</th>
<th>Ins. Co.</th>
<th>Employer</th>
<th>Group</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000000</td>
<td>Doe, John Doe</td>
<td>BlueCross</td>
<td>IBM Health Services</td>
<td>123456</td>
<td>4</td>
</tr>
<tr>
<td>0000000001</td>
<td>Doe, Jane</td>
<td>BlueCross</td>
<td>IBM Health Services</td>
<td>123456</td>
<td>4</td>
</tr>
</tbody>
</table>

3. Choose one of the following:

   To change the benefit plan details for the selected patient, deselect **Can have multiple subscribers** checkbox.

   To change the benefit plan details for all patients using this benefit plan, select **Can have multiple subscribers** checkbox. For our example, we will select this option.

4. Click Coverage.
axiUm displays the Benefit Plan Coverage window. It shows the coverage details included in the benefit plan.

![Benefit Plan Coverage Window](image)

5. Click **Clear Data**.

axiUm clears the fields.

6. Enter the fields and options. For our example, we will select the following:

   - **Item #**: 180
   - **Category**: B
   - **Name**: Pulp Capping
   - **From**: D3110
   - **To**: D3120
   - **Percentage**: 80

7. Click **(Add a new Record)**.

Because we selected to change the benefit plan details for all patients using this benefit plan, and this affects three other subscribers, axiUm displays the following message box.

![Multiple Subscriber Warning](image)
8. Click Yes.

axiUrn adds the item to the list view.

You have now successfully added a benefit plan coverage detail in axiUrn.

Modifying Benefit Plan Coverage Details

There are different ways to modify the benefit coverage details:

- On the Insurance tab
- The Benefit Plan Coverage window

The following instructions cover both methods.

Modifying Benefit Plan Coverage Details Using the Insurance Tab

▼To modify benefit plan details on the Insurance tab:

1. Open the Patient Info window’s Insurance tab.

   For instructions on opening the Patient Info window’s Insurance tab, see Opening the Insurance Tab on page 231.

2. From the list view, highlight an item. For our example, we will select Jane Doe’s insurance.

<table>
<thead>
<tr>
<th>Subscriber</th>
<th>Name</th>
<th>Ins. Co.</th>
<th>Employer</th>
<th>Group</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>Jane D</td>
<td>UNICOM</td>
<td>GDL Home Services</td>
<td>00025</td>
<td>4</td>
</tr>
<tr>
<td>098765432</td>
<td>John D</td>
<td>AETNA</td>
<td>GDL Home Services</td>
<td>00025</td>
<td>4</td>
</tr>
</tbody>
</table>

3. Choose one of the following:

   To change the benefit plan details for the selected patient, deselect Can have multiple subscribers checkbox.

   To change the benefit plan details for all patients using this benefit plan, select Can have multiple subscribers checkbox. For our example, we will select this option.

   Once you have multiple subscribers on the benefit plan, you cannot deselect this checkbox.

4. Make changes to the fields and options under the Benefit Plan Information section.
Changes made to this section apply to all subscribers using the selected benefit plan. For our example, we will select the following:

- **Group:** 66425
- **Division:** 4

Because we selected to change the benefit plan details for all patients using this benefit plan, and this affects three other subscribers, axiUm displays the following message box.

5. Click **(Modify Record).**

6. Click **Yes.**

axiUm saves the changes.

You have now successfully modified benefit plan coverage details using the Insurance tab.

**Modifying Benefit Plan Coverage Details Using the Benefit Plan Coverage Window**

To modify benefit plan details on the Benefit Plan Coverage window:

1. Open the **Patient Info** window’s **Insurance** tab.

   For instructions on opening the Patient Info window’s Insurance tab, see *Opening the Insurance Tab* on page 231.
2. From the list view, highlight an item. For our example, we will select Jane Doe’s insurance.

<table>
<thead>
<tr>
<th>Subscriber ID</th>
<th>Name</th>
<th>Ins. Co.</th>
<th>Employer</th>
<th>Group</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>31053013</td>
<td>Doe, Jane</td>
<td>BETK</td>
<td>GDL Home Services</td>
<td>18625</td>
<td>4</td>
</tr>
<tr>
<td>309528912</td>
<td>Doe, Jane</td>
<td>BETK</td>
<td>GDL Home Services</td>
<td>18625</td>
<td>4</td>
</tr>
</tbody>
</table>

3. Choose one of the following:

To change the benefit plan details for the selected patient, deselect **Can have multiple subscribers** checkbox.

To change the benefit plan details for all patients using this benefit plan, select **Can have multiple subscribers** checkbox.

4. Click **Coverage**.

axiUm displays the Benefit Plan Coverage window. It shows the coverage details included in the benefit plan.

5. From the list view, highlight an item. For our example, we will select ID 180, Pulp Capping.

6. Re-enter the fields and options. For our example, we will select the following:
   - Percentage: 90
   - Times #: 1
   - Frequency: 1, Year(s)

7. Click **(Modify Record)**.
Because we selected to change the benefit plan details for all patients using this benefit plan, and this affects three other subscribers, axiUm displays the following message box.

8. Click Yes.

Because we changed the coverage percentage, you have the option to apply it to the selected item or to all items in the same category. axiUm displays the following message box.

9. Click Yes. For our example, we will choose to apply the changes to all items in the category.

axiUm saves the changes.

You have now successfully modified benefit plan coverage details using the Benefit Plan Coverage window.

Deleting Benefit Plan Coverage Details

To delete benefit plan details:

1. Open the Patient Info window’s Insurance tab.

For instructions on opening the Patient Info window’s Insurance tab, see Opening the Insurance Tab on page 231.

2. From the list view, highlight an item. For our example, we will select Jane Doe’s insurance.
3. Click **Coverage**.

   axiUm displays the Benefit Plan Coverage window. It shows the coverage details included in the benefit plan.

4. From the list view, select an item. For our example, we will select ID **180**, **Pulp Capping**.

5. Click **(Delete Record)**.

   Because we selected to change the benefit plan details for all patients using this benefit plan, and this affects three other subscribers, axiUm displays the following message box.

6. Click **Yes**.
axiUm displays a message box.

![Message Box](image)

7. Click Yes.

axiUm deletes the benefit plan information from the list view.

You have now successfully deleted a benefit plan coverage detail.

**Previewing Benefit Plan Coverage Details**

▼ To preview benefit plan coverage details:

1. Open the Benefit Plan Coverage window.

   For instructions on opening the Benefit Plan Coverage window, see *Opening Current Benefit Plan Coverages* on page 244.

2. From the list view, select an item.

3. Click ![Preview Report](image) (Preview Report).
axiUm displays the Benefit Plan Coverage report. This report displays benefit plan details in the patient record.

You can print the report from this window. For more information on this and other Crystal Reports features, refer to your Crystal Report help document.

4. Click 🔊 (Close).

axiUm closes the Benefit Plan Coverage report and returns to the Patient Info window.

You have now successfully previewed the benefit plan coverage information.

**Printing Benefit Plan Coverage Details**

▼ To print insurance information details:

1. Open the **Benefit Plan Coverage** window.

   For instructions on opening the Benefit Plan Coverage window, see *Opening Current Benefit Plan Coverages* on page 244.

2. Click 📜 (Print Report).
axiUm displays the Select Printer window.

![Select Printer Window]

3. Highlight an item. This is the printer you want to print to.

   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

axiUm prints the report to the selected printer.

You have now successfully printed insurance information.

Copying Benefit Plan Coverage Details

If you want to add a benefit plan (or replace the current benefit plan with a different one), and it is similar to an existing one, you can copy the details of an existing benefit plan, and make changes to it.

To copy benefit plan coverage details:

1. View the patient’s current benefit plan details.

   For instructions on opening the Benefit Plan Coverage window, see Opening Current Benefit Plan Coverages on page 244.

2. From the list view, select an item

3. Click (Copy Template).
axiUm displays a message box.

4. Click Yes.

axiUm displays the Coverage Template List window.

5. From the list view, select an item.

6. Click (Close).

Alternatively, double-click the item.

axiUm saves your selection, closes the Coverage Template List window, and returns to the previous window.

axiUm displays the details of your selection.

7. Click (Modify Record).

axiUm saves the changes.

8. Click (Close).

axiUm saves your changes, closes the current window, and returns to the Patient Info window.

You have now successfully copied a benefit plan coverage.

5.3 Using Benefit Plan Templates

If you want to use a benefit plan that already exists, you can use an existing benefit plan coverage template.
This section covers the following topics:

- Opening the Coverage Template List window
- The Coverage Template List window
- Applying benefit plan templates
- Copying currently linked coverage templates

**Opening the Coverage Template List Window**

▼To open the Coverage Template List window:

1. View the patient’s current benefit plan details.
   
   For instructions on opening the Benefit Plan Coverage window, see *Opening Current Benefit Plan Coverages* on page 244.

2. Click (Use Template).
   
   axiUm displays the Coverage Template List window.

The next section describes the Coverage Template List window.
The Coverage Template List Window

This is how the Coverage Template List window may look when you open it.

Use this window to copy coverage templates. For instructions on copying coverage templates, see Copying Currently Linked Coverage Templates on page 260.

For information on the Coverage Template List window, refer to the axiUm Reference Manual for Maintenance and see Coverage Template List Window on page 298.

Applying Benefit Plan Templates

1. Open the Coverage Template List window.

   For instructions on opening the Coverage Template List window, see Opening the Coverage Template List Window on page 258.

2. From the list view, highlight an item.

3. Click (Close).

   Alternatively, double-click the item.

   axiUm saves your selection, closes the Coverage Template List window, and returns to the previous window.

4. Click (Close).
Alternatively, double-click the item.

axiUm saves your selection, closes the current window, and returns to the Patient Info window.

Copying Currently Linked Coverage Templates

▼To copy currently linked coverage templates:

1. View the patient’s current benefit plan details.

   For instructions on opening the Benefit Plan Coverage window, see *Opening Current Benefit Plan Coverages* on page 244.

2. From the list view, select an item.

3. Click (Copy Template).

   axiUm displays a message box.

4. Click Yes.

   axiUm displays the Coverage Template List window.

5. From the list view, select an item.

6. Click (Close).

   Alternatively, double-click the item.

   axiUm saves your selection, closes the Coverage Template List window, and returns to the previous window.

   axiUm displays the details of your selection.

7. Click (Modify Record).

   axiUm saves the changes.

8. Click (Close).
6 Extending Benefit Plans to Dependents

This section covers the following topics:

- Applying multiple coverages to multiple patients
- Viewing cross-coverage benefit plan information
- The Dependents window
- Editing cross-coverage benefit plan information
- Viewing cross-coverage benefit plan activity history

6.1 Applying Multiple Coverages to Multiple Patients

This section covers the following topics:

- Applying cross-coverage benefit plans between two adults
- Applying dual coverage benefit plans from two adults to one child
- Applying dual coverage benefit plans from two adults to two children

Applying Cross-Coverage Benefit Plans Between Two Adults

In a cross-coverage situation, a couple applies their benefit plans to themselves and also to each other. In the following procedure, will use our Jane Doe and John Doe examples:

- Jane Doe and John Doe are both patients in axiUm.
- Jane Doe and John Doe both work for the same company, GDL Home Services.
- Jane Doe has a benefit plan, and would like to extend coverage to her husband John Doe.
- John Doe also has a benefit plan, and would also like to extend coverage to his wife Jane Doe.

▼To apply cross-coverage benefit plans between two adults:

1. Open the Patient Info window’s Guarantor tab for the first patient, Jane Doe.

For instructions on opening the Patient Info window’s Insurance tab, see Opening the Guarantor Tab on page 122.
2. Add the second patient as a guarantor. For our example, we will add John Doe to Jane Doe's patient record.

For instructions on adding guarantors, see Adding Guarantors who are Patients on page 125.

axiUm displays a message box.

3. Click Yes.

4. In the Patient Info window's Guarantor tab, make sure that you have:
   
   • Primary Guarantor checkbox selected for Jane Doe
   • Secondary Guarantor checkbox selected for John Doe
axiUm displays the guarantor’s employer information in the Employers tab.

Jane Doe’s patient record.

Jane Doe’s employer information.

John and Jane are primary holders of their own insurance benefit plan.

axiUm also displays the guarantor’s insurance information in the Insurance tab.

Jane Doe’s patient record.

John Doe’s insurance information.
5. Open the Patient Info window’s Guarantor tab for the second patient, John Doe.

For instructions on opening the Patient Info window’s Insurance tab, see Opening the Guarantor Tab on page 122.

6. Add the second patient as a guarantor. For our example, we will add Jane Doe to John Doe’s patient record.

For instructions on adding guarantors, see Adding Guarantors who are Patients on page 125.

axiUm displays a message box.

7. Click Yes.

8. In the Patient Info window’s Guarantor tab, make sure that you have:
   • Primary Guarantor checkbox selected for John Doe
   • Secondary Guarantor checkbox selected for Jane Doe
axiUm displays the guarantor’s employer information in the Employers tab.

John Doe's employer information.

Jane Doe's employer information.

John & Jane are primary holders of their own insurance benefit plan.

axiUm also displays the guarantor’s insurance information in the Insurance tab.

John Doe's patient record.

Jane Doe's insurance information.
You have now successfully applied a cross-coverage benefit plan between two adults.

Applying Dual Coverage Benefit Plans From Two Adults to One Child

In a dual coverage situation, a couple applies both of their benefit plans to their child.

In the following procedure:

- We will take our Jane Doe and John Doe example from the previous section, *Applying Cross-Coverage Benefit Plans Between Two Adults* on page 261.
- Mary Doe is not yet a patient in axiUm.
- Apply dual coverage to their first child, Mary Doe.

▼To apply dual insurance coverage on a child’s patient record:

1. Create a patient record for Mary Doe.
   
   For instructions on creating patient records, see *Creating Patient Records* on page 11.

   You can create a child’s patient record by copying a parent’s patient record (see Copying Patient Records on page 17). axiUm gives you the option to copy the parent’s benefit plans. If you do, you only need to add the other parent’s benefit plan.

2. Add the first guarantor to the patient record. For our example, we will add John Doe to Mary Doe’s patient record.
   
   For instructions on adding guarantors, see *Adding Guarantors who are Patients* on page 125.

   axiUm displays a message box.

3. Click Yes.
4. Highlight the guarantor’s name, John Doe.
5. Select the **Primary Guarantor** checkbox.

axiUm displays the guarantor’s employer information in the Employers tab.

Mary Doe’s patient record.

John Doe’s employer information.

John is the primary holder of his insurance benefit plan.
axiUm also displays the guarantor’s insurance information in the Insurance tab.

6. Add the second guarantor to the patient record. For our example, we will add Jane Doe to Mary Doe’s patient record.

For instructions on adding guarantors, see *Adding Guarantors who are Patients* on page 125.

axiUm displays a message box.

7. Click Yes.
Because the first guarantor we added is already the patient’s primary guarantor, axiUm automatically assigns the second guarantor as the secondary guarantor.
axiUm displays the guarantor’s employer information in the Employers tab. Because the patient does not work, axiUm displays the guarantors’ employer information.

John & Jane are primary holders of their own insurance benefit plan.

axiUm also displays the guarantor’s insurance information in the Insurance tab.

John & Jane’s employer information.
You have now successfully applied a dual coverage benefit plan to a child’s patient record.

**Applying Dual Coverage Benefit Plans From Two Adults to Two Children**

In a dual coverage situation, a couple applies both of their benefit plans to their child. In the following procedure:

- We will take our Jane Doe and John Doe example from the previous section, *Applying Cross-Coverage Benefit Plans Between Two Adults* on page 261.
- Mary Doe is the first child, is already a patient in axiUm, and has dual benefit plan coverage from the previous section, *Applying Dual Coverage Benefit Plans From Two Adults to One Child* on page 266.
- Mike Doe is the second child, and is not yet a patient in axiUm.

▼To apply dual benefit plan coverage for the second child:

1. Copy the first child’s patient record. For our example, we will use Mary Doe’s patient record to create Mike Doe’s patient record.

   For instructions on copying patient records, see *Copying Patient Records* on page 17.

   When axiUm displays the Select Policies window, highlight all policies to apply. We want the second child to receive the same dual insurance coverage as the first child.

   ![Select Policies Window](image)

2. Add the first guarantor to the patient record. For our example, we will add John Doe to Mike Doe’s patient record.

   For instructions on adding guarantors, see *Adding Guarantors who are Patients* on page 125.

3. Add the second guarantor to the patient record. For our example, we will add Jane Doe to Mike Doe’s patient record.

   For instructions on adding guarantors, see *Adding Guarantors who are Patients* on page 125.

4. Click *Save*. 
You have now successfully created a dual benefit plan coverage from two adults to two children.

### 6.2 Viewing Cross-Coverage Benefit Plan Information

You can view general information about the benefit plan on a patient’s dependents in the Dependents window.

There are different methods to opening the Dependents window:

- Clicking a button
- Double-clicking an item.

This section covers the different methods.

▼ To view cross-coverage benefit plan information by clicking a button:

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.

2. From the list box, click on a patient’s name. For our example, we will select *John Doe*.

   ![Dependents Window](image)

3. Click **Dependents**...

   axiUm displays the Dependents window.

▼ To view cross-coverage benefit plan information by double-clicking:

1. Display the **Insurance** tab.

   For instructions on opening the Insurance tab, see *Opening the Insurance Tab* on page 231.
2. From the list box, double-click on a patient’s name. For our example, we will select John Doe.

axiUm displays the Dependents window.

The next section describes the Dependents window.

6.3 The Dependents Window

This is how the Dependents window may look when you open it.

Use this window for:

- Editing cross-coverage benefit plan information
- Viewing cross-coverage benefit plan activity history

The following sections will explain the procedures for these tasks.
6.4 Editing Cross-Coverage Benefit Plan Information

To edit cross-coverage benefit plan information:

1. Open the Dependents window. For our example, we will select John Doe.

   For instructions on opening the Insurance tab, see Viewing Cross-Coverage Benefit Plan Information on page 272.

2. Make changes to the fields and options.

3. Click OK.

   axiUm saves the changes, closes the Dependents window and returns to the Patient Info window.

6.5 Viewing Cross-Coverage Benefit Plan Activity History

axiUm retains a historic record of all changes made to each dependent’s record. The historic records contain:

- Department # or Patient ID
- Type of action
- User name of the person who made the changes
- Date and time of change
- Information from the Dependents window for comparing changes

For our example, we will use Jane Doe’s patient record. Her husband John Doe is a dependent in her patient record.

To view activity history of cross-coverage benefit plans:

1. Open the Dependents window. For our example, we will select John Doe.

   For instructions on opening the Insurance tab, see Viewing Cross-Coverage Benefit Plan Information on page 272.

2. Click History.
axiUm displays the Dependents History window.

3. From the list view, highlight an item.

axiUm displays details of the dependent’s coverage record.

You have now successfully viewed the Dependents History window.