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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 Scheduler module.
- 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>
This guide also uses the following icons to identify the different document elements:

- **Notes and helpful information.** For example, things that will become apparent later on in the procedure.

- **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.

- **Tips, ideas, and alternative methods.** For example, using shortcuts, applying previously learned tools, or suggesting different uses.

- **Warnings before taking action.** For example, precautions against irreversible actions, or actions that require a lot of work to undo.

- **Challenges and extra steps.** For example, steps that take you beyond the basic procedures.
Scheduling staff can use the Scheduler module to:

- Search for available time blocks
- Enter patient appointments
- Administer cancellations and no-shows
- Manage recall appointments
- Organize wait list appointments

This chapter covers the following topics:

- About scheduling modes
- Opening the Scheduler module
- About the Scheduler window

Read the following sections to familiarize yourself with the features of the Scheduler module.

1 About Scheduling Modes

There are different modes of scheduling:

- Book
- Chair
- Availability

Make sure you select the correct mode to suit the needs of your institution, clinic, or provider type. Use the table below to select the correct method.
This manual contains information on common features shared across all modes of scheduling. For mode-specific features, see the axiUm User Guide for Scheduler of that specific mode.

2 Opening the Scheduler Module

There are different methods to access the Scheduler module:

- Icon
- Actions menu
- Desktop

The following instructions describe these methods.

▼To open the Scheduler module using the icon:

Click (Scheduler).
To open the Scheduler module using the Actions menu:

From the **Actions** menu, click **Scheduler**.

To open the Scheduler module using the Desktop:

From the Desktop, click **Scheduler**.

The next section shows the Scheduler module window.
3 About the Scheduler Window

This is how the Scheduler window may look when you open it for the first time:

![Scheduler Window Diagram]

You are now ready to begin using the Scheduler window.
This chapter covers the setup tasks you must complete before using the Scheduler module. Depending on the Scheduler module’s mode that you are using, additional mode-specific setup is required. For instructions on mode-specific setup, refer to the axiUm User Guide for Scheduler for the associated scheduling mode. You must have access rights (i.e., administrator access level) to access some of these windows.

This chapter covers the following topics:

- Defining office charge codes
- Setting up Scheduler
- Defining appointments
- Setting up appointment activities

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

Before you set up the Scheduler module, you must carefully analyze the purpose and method of your institution’s scheduling. For information on the Scheduler module’s various purpose and recommended scheduling mode, see About Scheduling Modes on page 1.

1 Defining Office Charge Codes

Office charges can be a variety of patient charges, including items patients purchase at the clinic (e.g. toothbrush), cancellation or no-show charges, and bounced cheques.

For this example, we will create an office charge for no-show appointments called No Show.
To define an office charge:

1. Go to Maintenance module’s Transactions tab.
2. Double-click the Office Charge Codes icon.

axiUm displays the Office Charge Codes window. For information on the Office Charge Codes window, refer to the axiUm Reference Manual for Maintenance and see Office Charge Codes Window on page 943.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

   - Code: CANCEL
   - Description: Cancellation Charge
   - Print Description: Cancellation Charge
   - Amount: 20.00

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
2. Click (Close).

axiUm closes the Office Charge Codes window and returns to the Maintenance window.

You have successfully defined an office charge.

2 Setting up Scheduler

This section covers the following topics:

- Setting up clinic locations
- Setting up clinics
- Setting up chairs in clinics
- Setting up Scheduler display features

2.1 Setting up Clinic Locations

Chart requests and dispensary requests are tied to a location. When you make an appointment at a clinic at this location, you can also request charts and dispensary items.

Chair records must be associated to locations. If you do not define a location, you will be unable to create chair records later in the setup.

For this example, we will create a location Dental School Grad Clinic.
To set up a clinic location:

1. Go to Maintenance module's Office tab.
2. Double-click the Location icon.

axiUm displays the Location Codes window. For information on the Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Location Codes Window on page 449.

3. Click [Clear Data].

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Location: DSGC
   - Description: Dental School Grad Clinic
   - Charts Go To: Provider/User
   - Dispensary: DISP1, 1st Floor Dispensary
   - Active Days: Monday - Sunday

5. Click [Add a new Record].

axiUm saves the new record and displays it in the list view.
6. Click \( \times \) (Close).

axiUm closes the Location Codes window and returns to the Maintenance window.

You have successfully set up a clinic location.

### 2.2 Setting up Clinics

This section covers the following topics:

- Defining clinics
- Granting users access to clinics
- Defining clinic sessions

**Defining Clinics**

This is the clinic for which you are creating the book. You must set yourself as the owner of the book and add providers to your book.

**\( \blacktriangledown \) To set up your clinic:**

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Clinics icon.

axiUm displays the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see *Clinics Window* on page 725.
3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

- Name: Grad Clinic
- Use Instructor’s Work Schedules: selected
- Selectable for Appointment Requests: selected
- Charge for Cancelled Appt.: Yes (Prompt)
- Charge for Failed Appt.: Yes (Prompt)

5. Click (Add a new Record).

axiUm displays the Charge Defaults window. For information on the Charge Defaults window, refer to the axiUm Reference Manual for Maintenance and see Charge Defaults Window on page 728.

6. Enter the fields and options. For our example, we will enter nothing and click Cancel.

axiUm saves the entries, closes the Charge Defaults window, and returns to the Clinics window.

axiUm saves the new record and displays it in the list view.
7. Click (Close).

axiUm closes the Clinics window and returns to the Maintenance window.

You have successfully defined a clinic.

Granting Users Access to Clinics

To grant a user access to a clinic:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Clinics icon.

axiUm displays the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 725.
3. From the list view, highlight a clinic name. For our example, we will select Grad Clinic.

4. Click (User Access).

axiUm displays the User Accessibility for Clinics window. For information on the User Accessibility for Clinics window, refer to the axiUm Reference Manual for Maintenance and see User Accessibility for Clinics Window on page 731.

Next you must give yourself (the instructor) access to this clinic.

5. Search for a user record by entering the fields and options in the Selection Criteria section and clicking the Search button. For our example, we will search for you (the administrator), Axium Admin.

6. From the Users with No Access (searched for) list box, highlight a record.

7. Click (right arrow).

axiUm moves your name from the Users with No Access (searched for) list box to the Users with Access list box.
Next you must give your students access to this clinic.

8. Repeat steps 5 to 7 for the following providers:
   - Ken Klaahsen
   - Lisa Jaaks
   - Chris Wiid
   - Sandy Rhabb

9. Click (Close).

   axiUm closes the User Accessibility for Clinics window and returns to the Clinics window.

You have successfully granted multiple users access to a clinic.
Defining Clinic Sessions

If you are using chair mode of scheduling, you must define sessions. If you do not create sessions for your clinic, you cannot define your chair layout in the Scheduler window’s Chair tab.

For this example, we will set up the clinic Grad Clinic, and define a morning and afternoon session for this clinic.

To define a clinic session:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Clinics icon.

axiUm displays the Clinics window. For information on the Clinics window, refer to the axiUm Reference Manual for Maintenance and see Clinics Window on page 725.

3. From the list view, highlight a clinic name. For our example, we will select Grad Clinic.

4. Click (Sessions).

axiUm displays the Sessions window. For information on the Sessions window, refer to the axiUm Reference Manual for Maintenance and see Sessions Window on page 729.
5. Click  (Clear Data).

axiUm clears the fields and options.

6. Create a morning session by entering the fields and options. For our example, we will enter the following:

- **Description**: Morning Session
- **Start**: 08:00 AM
- **End**: 12:00 PM
- **Active Days**: Monday - Sunday
- **Active From**: September 1, 2012
- **To**: June 30, 2013
- **Period**: 1

7. Click  (Add a new Record).

axiUm saves the new record and displays it in the list view.
8. Click (Clear Data).

axiUm clears the fields and options.

9. Create an afternoon session by entering the fields and options. For our example, we will enter the following:

- **Description:** Afternoon Session
- **Start:** 01:00 PM
- **End:** 05:00 PM
- **Active Days:** Monday - Sunday
- **Active From:** September 1, 2012
- **To:** June 30, 2013
- **Period:** 2

10. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
11. Click \( \times \) (Close).

axiUm closes the Sessions window and returns to the Clinics window.

12. Click \( \times \) (Close).

axiUm closes the Clinics window and returns to the Maintenance window.

You have successfully set up a clinic.

### 2.3 Setting up Chairs in Clinics

If you are using book method of scheduling, make sure you have defined your clinic location first. For instructions on setting up clinic locations, refer to axiUm User Guide for Scheduler: Book Method of Scheduling and see *Setting up Clinic Locations* on page 18.

You must create chairs and assign these chairs to a clinic. If you do not do this, no chairs exist in the clinic and you will be unable to book appointments in that clinic. You will also be unable to define your clinic’s chair layout in the Clinic Layout window.
For this example, we will set up the following chair names:

- DC01
- DC02
- DC03
- DC04

To set up chairs in your clinic:

1. Go to Maintenance module's Scheduler tab.
2. Double-click the Chairs icon.

axiUm displays the Chairs window. For information on the Chairs window, refer to the axiUm Reference Manual for Maintenance and see Chairs Window on page 709.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Name: DC01
   - Description: DC01
   - Clinic: Grad Clinic
   - Time Block: 15 Minutes

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
6. Repeat steps 3 to 5 for the remaining chairs:

- DC02
- DC03
- DC04

7. Click \(\text{x}\) (Close).

    axiUm closes the Chairs window and returns to the Maintenance window.

You have successfully set up chairs in the clinic.
2.4 Setting up Clinic Details & Options

This section covers the following topics:

- Setting up clinic holidays
- Setting up clinic time reasons
- Setting up non-clinic time reasons
- Setting up closure reasons

Setting up Clinic Holidays

Clinic holidays are times when no treatments will be performed, and are often recurring and predictable, such as Christmas Day. For this example, we will create a clinic holiday for Christmas Day, for the clinic Dental School Grad Clinic.

▼To set up a clinic holiday:

1. Go to Maintenance module's Scheduler tab.
2. Double-click the Clinic Holidays icon.

axiUm displays the Clinic Holidays window. For information on the Clinic Holidays window, refer to the axiUm Reference Manual for Maintenance and see Clinic Holidays Window on page 714.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
• Clinic: Grad Clinic
• Description: Christmas Day
• Start Date: December 25, 2012
• End Date: December 25, 2012

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

6. Click (Close).

axiUm closes the Clinic Holidays window and returns to the Maintenance window.

You have successfully set up a clinic holiday.

Setting up Clinic Time Reasons

You can set up your clinic’s preferences to do certain types of treatments during certain times. These clinic preferences can be visually set up so that booking staff know when to book these types of treatments. Because these are preferences and not rules, you can still book appointments other than what is indicated during this clinic time.

For our example, we will create a clinic time called Oral Surgery.

▼To set up clinical time reasons:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Clinic Time Reasons icon.
axiUrn displays the Clinic Time Reasons window. For information on the Clinic Time Reasons window, refer to the axiUrn Reference Manual for Maintenance and see Clinic Time Reasons Window on page 720.

3. Click (Clear Data).

axiUrn clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Display Desc: Oral Surgery
   - Default Color: 

5. Click (Add a new Record).

axiUrn saves the new record and displays it in the list view.

6. Click (Close).

axiUrn closes the Clinic Time Reasons window and returns to the Maintenance window.

You have successfully set up a clinic time reason.
Setting up Non-Clinic Time Reasons

You can set aside time where no appointments can be booked. For example, classroom time when providers are not available at this clinic. For our example, we will create the non-clinic time Class. Since in-between morning and afternoon session can define lunch, you do not define lunch time here. If you do not define non-clinic times, providers will be booked during this time.

▼To set up non-clinic time reasons:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Non-Clinic Time Reasons icon.

axiUm displays the Clinic Time Exception Reasons window. For information on the Clinic Time Exception Reasons window, refer to the axiUm Reference Manual for Maintenance and see Clinic Time Exception Reasons Window on page 719.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Description: Class
   - Default Color:

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
6. Click (Close).

axiUm closes the Clinic Time Exception Reasons window and returns to the Maintenance window.

You have successfully set up a non-clinic time reason.

2.5 Setting up Scheduler Display Features

This section covers the following topics:

- Setting up Appointment window mode
- Setting up appointment indicators

Setting up Appointment Window Mode

There are two modes of appointment views, patient mode and family mode. Use patient mode for viewing the appointments of a single patient. Use family mode to group family members in the same appointment view window to co-ordinate their appointments in a way that is most convenient for the family (e.g. they all have the same appointment time, or consecutive appointments with the same provider).

This section covers the following topics:

- Setting up appointment view to use patient mode
- Setting up appointment view to use family mode
Setting up Appointment View to Use Patient Mode

▼To set up patient mode:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.

3. Go to the Patient/Family Appointments Window section.
4. From the Mode drop-down field, select Patient.

5. Click Accept.

axiUm saves the changes, closes the Scheduler Options window, and returns to the Scheduler window.
You have successfully set up the appointment view to use patient mode.

Setting up Appointment View to Use Family Mode

▼To set up family mode:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.

3. Go to the Patient/Family Appointments Window section.
4. From the Mode drop-down field, select Family.

5. Click Accept.
axiUm saves the changes, closes the Scheduler Options window, and returns to the Scheduler window.

You have successfully set up the appointment view to use family mode.

Setting up Appointment Indicators

Appointment indicators are visual cues or symbols on a patient’s appointment block (in the Active tab or Weekly tab) that let you identify important notes about the patient. This way staff is made aware of appointment needs. You can display up to a maximum of six indicators in an appointment block. For example, you can select to display a symbol on patients’ appointment blocks to indicate that they need X-rays for this appointment.

For our example, we will set up to display a symbol indicating that the patient has additional booked appointments.

▼To set up an appointment indicator:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Appointment Indicators icon.

axiUm displays the Appointment Indicators window. For information on the Appointment Indicators window, refer to the axiUm Reference Manual for Maintenance and see Appointment Indicators Window on page 694.

There are six appointment indicators supplied by axiUm. You can modify the display of these.

3. Select the Active checkbox.
4. In the Display for drop-down field, select Today only.
5. Click (Appointment Indicator Values).
axiUm displays the Appointment Indicator Values window. For information on the Appointment Indicator Values window, refer to the axiUm Reference Manual for Maintenance and see *Appointment Indicator Values Window* on page 696.

Each indicator can have more than one value. For example, one for meeting the criteria (e.g. patient needs an exam) and one for resolving the criteria (e.g. the exam is complete); and you can select to invert the colors of the symbols to differentiate between met versus resolved criteria.

Next you must set up to display this indicator symbol in the Scheduler module.

**6.** Click (Close).

axiUm closes the Appointment Indicator Values window and returns to the Appointment Indicators window.

**7.** Click (Close).

axiUm closes the Appointment Indicators window and returns to the Maintenance window.

**8.** Go to *Maintenance* module’s *Scheduler* tab.

**9.** Double-click the *Scheduler Options* icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see *Scheduler Options Window* on page 828.
10. Go to the **Scheduler Type** section.

11. Click **Indicators**.

axiUm displays the Appointment Indicators to Display window. For information on the Appointment Indicators to Display window, refer to the axiUm Reference Manual for Maintenance and see *Appointment Indicators to Display Window* on page 839.

12. From the **Not Selected for Display** list box, select **HADAP. Has Additional Appointments**.
13. Click (right arrow).

axiUm moves the highlighted item from the Not Selected for Display list box to the Selected for Display list box.

14. Select the Show Indicators checkbox.

15. Click Accept.

axiUm closes the Appointment Indicators to Display window and return to the Scheduler Options window.

You have successfully set up appointment indicators to display in booked appointment blocks.

3 Defining Appointments

This section covers the following topics:

- Defining appointment codes
- Granting providers access to appointment codes
- Defining missed appointment codes

3.1 Defining Appointment Codes

This section covers the following topics:

- Defining appointment codes for single providers
- Defining appointment codes for multiple providers

Defining Appointment Codes for Single Providers

For our example, we will define a single-provider appointment code for a 2.5-hour appointment.

▼To define a single-provider appointment code:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Appt. Codes icon.

axiUm displays the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 679.
3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

- **Code**: 2.5HR
- **Description**: 2 1/2 Hour Appointment
- **Code Type**: Regular Appointment
- **Assign Provider**: Prompt (except Free Access Patient)
- **Assign Second Provider**: No
- **Minutes**: Provider: 120
- **Assign Event**: Scheduling Appt

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
6. Click \(\times\) (Close).

axiUm closes the Appointment Codes window and returns to the Maintenance window.

You have successfully defined an appointment code that requires a single provider.

**Defining Appointment Codes for Multiple Providers**

For our example, we will define a multiple-provider appointment code for a 2.5-hour appointment.

▼ **To define a single-provider appointment code:**

1. Go to **Maintenance** module’s **Scheduler** tab.
2. Double-click the **Appt. Codes** icon.

axiUm displays the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see *Appointment Code Window* on page 679.
3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

- Code: 2.5HR
- Description: 2 1/2 Hour Appointment
- Code Type: Regular Appointment
- Assign Provider: Prompt (except Free Access Patient)
- Assign Second Provider: Prompt (except Free Access Patient)
- Minutes: Provider: 120
- Assign Event: Scheduling Appt

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
6. Click (Close).

axiUm closes the Appointment Codes window and returns to the Maintenance window.

You have successfully defined an appointment code that requires multiple providers.

### 3.2 Granting Providers Access to Appointment Codes

This section covers the following topics:

- Granting appointment code access by provider types
- Granting appointment code access by individual providers

**Granting Appointment Code Access by Provider Types**

For our example, we will grant provider type **D. Dental Student** access to the **2.5HR, 2 1/2 Hour Appointment** appointment code.
To grant appointment code access by provider type:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Appt. Codes icon.

axiUm displays the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 679.

3. From the list view, highlight a record. For our example, we will highlight 2.5HR. 2 1/2 Hour Appointment.


axiUm displays the Appointment Code Access window. For information on the Appointment Code Access window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Access Window on page 689.
5. From the list view, highlight a record. For our example, we will highlight Dental Student.

6. From the Access drop-down field, select Yes.

7. Click (Modify Record).

axiUm saves the changes and displays the updated record in the list view.

8. Click (Close).

axiUm closes the Appointment Code Access window and returns to the Appointment Code window.

9. Click (Close).

axiUm closes the Appointment Code window and returns to the Maintenance window.

You have successfully granted appointment code access by provider type.

Granting Appointment Code Access by Individual Providers

▼To grant appointment code access by individual provider:

1. Go to Maintenance module’s Scheduler tab.

2. Double-click the Appt. Codes icon.

axiUm displays the Appointment Code window. For information on the Appointment Code window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Window on page 679.
3. From the list view, highlight a record. For our example, we will highlight 2.5HR, 2 1/2 Hour Appointment.


axiUm displays the Appointment Code Access window. For information on the Appointment Code Access window, refer to the axiUm Reference Manual for Maintenance and see Appointment Code Access Window on page 689.

5. From the list view, highlight a record. For our example, we will highlight D, Dental Student.

6. From the Access drop-down field, select Limited.

7. Click (Modify Record).

axiUm displays the Providers button on the Appointment Code Access window.
8. Click Providers.

axiUm displays the Provider Access to Appointment Codes window. For information on the Provider Access to Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see Provider Access to Appointment Code Window on page 691.

9. From the Providers with No Access list box, highlight a record. For our example, we will select provider David Caan.

10. Click (right arrow).

axiUm moves your name from the Providers with No Access list box to the Providers with Access list box.
11. Click \( \times \) (Close).

axiUm closes the Provider Access to Appointment Code window and returns to the Appointment Code Access window.

You have successfully granted appointment code access by individual provider.

3.3 Defining Missed Appointment Codes

This section covers the following topics:

- Defining failed appointments
- Defining cancelled appointments

**Defining Failed Appointments**

For our example, we will define the failed appointment *No Show, Did Not Show Up*.

\( \blacktriangledown \) To define a failed appointment:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Missed Appointment Codes icon.

axiUm displays the Missed Appointment Codes window. For information on the Missed Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see Missed Appointment Codes Window on page 763.
3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

   - Type: Fail
   - Code: NOSHOW
   - Reason: Did Not Show Up
   - Office Charge: LATE

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

6. Click (Close).

axiUm closes the Missed Appointment Codes window and returns to the Maintenance window.
You have successfully defined a failed appointment.

**Defining Cancelled Appointments**

For our example, we will create a cancelled appointment code **U24HR, Cancelled Under 24 Hour Notice**.

**To define a cancelled appointment:**

1. Go to **Maintenance** module’s **Scheduler** tab.
2. Double-click the **Missed Appointment Codes** icon.

   axiUm displays the Missed Appointment Codes window. For information on the Missed Appointment Codes window, refer to the axiUm Reference Manual for Maintenance and see **Missed Appointment Codes Window** on page 763.

3. Click (Clear Data).

   axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - **Type:** Cancel
   - **Code:** 24HROS
   - **Reason:** Cancelled Oral Surgery
   - **Office Charge:** CANCEL

5. Click (Add a new Record).

   axiUm saves the new record and displays it in the list view.
6. Click \(\text{Close}\).

axiUm closes the Missed Appointment Codes window and returns to the Maintenance window.

You have successfully defined a cancelled appointment.

4 Setting up Appointment Activities

This section covers the following topics:

- Setting up appointment entry mode
- Setting up wait lists

4.1 Setting up Appointment Entry Mode

This section covers the following topics:

- Setting up standard appointment entry mode
- Setting up advanced appointment entry mode
- Setting up ortho appointment entry mode
Setting up Standard Appointment Entry Mode

▼To set up the standard mode of appointment entry:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.

3. Go to the Appt Entry Window section.
4. Select the Standard option.

5. Click Accept.

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

You have successfully set up the Scheduler module to use the standard mode of appointment entry.
Setting up Advanced Appointment Entry Mode

To set up the advanced mode of appointment entry:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.

3. Go to the Appt Entry Window section.
4. Select the Advanced option.

5. Click Accept.

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

You have successfully set up the Scheduler module to use the advanced mode of appointment entry.
Setting up Ortho Appointment Entry Mode

To set up the ortho mode of appointment entry:

1. Go to **Maintenance** module’s **Scheduler** tab.
2. Double-click the **Scheduler Options** icon.

   axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see **Scheduler Options Window** on page 828.

3. Go to the **Appt Entry Window** section.
4. Select the **Ortho** option.

5. Click **Accept**.

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

You have successfully set up the Scheduler module to use the ortho mode of appointment entry.
4.2 Setting up Wait Lists

There is now a wait list for patients with active or pending appointments who want an earlier appointment date. You can place patients on the wait list manually, or have axiUm automatically do it for you. If there is an open spot in the scheduler that you want to fill, you can select the area and fill it directly from the wait list.

This section covers the following topics:

- Setting up wait list reasons
- Setting up wait list behavior

Setting up Wait List Reasons

Wait list reasons are reasons for patients being placed on the wait list.

▼To set up a wait list reason:

1. Go to Maintenance module’s Scheduler tab.
2. Double-click the Wait List Reasons icon.

axiUm displays the Wait List Reasons window. For information on the Wait List Reasons window, refer to the axiUm Reference Manual for Maintenance and see Wait List Reasons Window on page 849.

3. Click (Clear Data).
4. Enter the fields and options. For our example, we will enter the following:
   - Wait Reason: SOONER
   - Description: Wishes earlier appointment
   - Default Priority: 1
   - Expires: 0
5. Click \(\text{Add a new Record}\).

axiUm saves the new record and displays it in the list view.

6. Click \(\text{Close}\).

axiUm closes the Wait List Reasons window and returns to the Maintenance window.


axiUm displays the Default Patient Appointment Availability window. For information on the Default Patient Appointment Availability window, refer to the axiUm Reference Manual for Maintenance and see Default Patient Appointment Availability Window on page 734.

8. Click on the time blocks to select the entire institution’s default available hours of practice for booking patients. For our example, we will keep the default and change nothing.

9. Click OK.

axiUm saves the changes, closes the Default Patient Appointment Availability window, and returns to the Maintenance window.
You have successfully set up a wait list reason.

Setting up Wait List Behavior

▼To set up the wait list behavior:

1. Go to Maintenance module’s Scheduler tab.

2. Double-click the Scheduler Options icon.

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.

3. Go to the Wait List section.

4. Enter the fields and options. For our example, we will enter the following:
   - ‘Sooner if possible’ adds to Wait List: Yes (Prompt)
   - ‘Sooner if possible’ Wait Reason: SOONER, Wishes earlier appointment
   - Move to Pending Add to Wait List: Yes (Prompt)
   - Pending Wait List: SOONER, Wishes earlier appointment
5. Click **Accept**.

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

You have successfully set up wait list behavior.
This chapter covers the tasks you can accomplish using the Scheduler module.

This chapter covers the following topics:

- Searching for available time blocks
- Using Scheduler display features
- Managing appointment activities
- Printing appointment forms

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

1 Searching for Available Time Blocks

This section covers the following topics:

- Opening the Appointment Expert window
- Setting up the Appointment Expert window
- Using the Appointment Expert window

1.1 Opening the Appointment Expert Window

The Appointment Expert window is a powerful search tool for finding available appointment times specific to your search criteria.

To open the Appointment Expert window:

1. Go to the Scheduler module.
2. Click (Expert).
axiUm displays the Appointment Expert window. For information on the Appointment Expert window, refer to the axiUm Reference Manual for Scheduler and see Appointment Expert Window (Regular Mode) on page 14.

You have successfully opened the Appointment Expert window. You can define the default search behavior of the Appointment Expert window, then start using the Appointment Expert window.

For instructions on setting up the Appointment Expert window, see next section, Setting up the Appointment Expert Window on page 52.

For instructions on using the Appointment Expert window, see Using the Appointment Expert window on page 59.

1.2 Setting up the Appointment Expert Window

This section covers the following topics:

- Setting up search behavior
- Setting up scheduling behavior

Setting up Search Behavior

You can set up the Appointment Expert window’s default search behavior. For this example, we will set up the Appointment Expert window’s default search behavior to search for available appointment blocks between today and three months in the future, and to display in sets of 15 search results.
To set up this search behavior:

1. Open the **Appointment Expert** window.

   For instructions on opening the Appointment Expert window, see *Opening the Appointment Expert Window* on page 51.

2. Click **Options**.

   axiUm displays the Appointment Expert Options window. For information on the Appointment Expert Options window, refer to the axiUm Reference Manual for Scheduler and see *Appointment Expert Options Window* on page 19.
3. Go to the **Date Range** section.

4. Enter the fields and options. For our example, we will enter the following:
   - Start From __ days in the future: 0
   - Search To __ days in the future: 90

5. Go to the **Search** section.

6. Enter the fields and options. For our example, we will enter the following:
   - Number of search results: 15
   - Suggest multiple available times per open book: selected

7. Click **Accept**.
axiUm saves the changes, closes the Appointment Expert Options window, and returns to the Appointment Expert window.

You have successfully set up the Appointment Expert window’s default search behavior.

You can continue setting up more search behavior, or you can begin searching. To continue setting up more search behavior, continue reading the next sections, Setting up Scheduling Behavior on page 55.

For instructions on searching in the Appointment Expert window, see Using the Appointment Expert window on page 59.

Setting up Scheduling Behavior

You can set up axiUm’s scheduling behavior to do one of the following when you select an available appointment block:

- Hover the appointment block over the book
- Book the appointment in the selected appointment block

This section covers the instructions on how to set up these booking behaviors in the Appointment Expert window.

Hovering Appointment Block

You can set up the Appointment Expert window’s booking feature so that when you select an available time block from the search results, axiUm will create a hovering appointment block. You can then take this appointment block and insert it in the appointment book yourself.

▼To set up the Appointment Expert window to hover the selected appointment block:

1. Open the Appointment Expert window.

   For instructions on opening the Appointment Expert window, see Opening the Appointment Expert Window on page 51.
2. Click Options.

axiUm displays the Appointment Expert Options window. For information on the Appointment Expert Options window, refer to the axiUm Reference Manual for Scheduler and see Appointment Expert Options Window on page 19.

3. Go to the Appointments section.

4. Deselect the ‘Make Appts’ button will schedule automatically at time selected checkbox.
5. Click Accept.

axiUm saves the changes, closes the Appointment Expert Options window, and returns to the Appointment Expert window.

You have successfully set up the Appointment Expert window’s behavior to display a hovering appointment block for a selected appointment block.

Booked Appointment Block

You can set up the Appointment Expert window’s booking feature so that when you select an available time block from the search results, axiUm will book the appointment for the selected appointment block.

▼To set up the Appointment Expert window to book the selected appointment block:

1. Open the Appointment Expert window.

For instructions on opening the Appointment Expert window, see Opening the Appointment Expert Window on page 51.
2. Click Options.

axiUm displays the Appointment Expert Options window. For information on the Appointment Expert Options window, refer to the axiUm Reference Manual for Scheduler and see *Appointment Expert Options Window* on page 19.

![Appointment Expert Options window](image)

3. Go to the Appointments section.

4. Select the ‘Make Appts’ button will schedule automatically at time selected checkbox.

![Make Appts checkbox](image)

5. Click Accept.

axiUm saves the changes, closes the Appointment Expert Options window, and returns to the Appointment Expert window.

You have successfully set up the Appointment Expert window to book a selected appointment block.
1.3 Using the Appointment Expert window

Before you begin, make sure you have set up your default Appointment Expert window search behavior. For instructions on setting up your default Appointment Expert window search behavior, see Setting up the Appointment Expert Window on page 52.

For this example, we will search for a one-hour appointment for patient Jane Doe who wants to see provider Ken Klaahsen in the month of November any time in the afternoon.

▼To use the Appointment Expert window to search for available appointment blocks:

1. Open the Appointment Expert window.

   For instructions on opening the Appointment Expert window, see Opening the Appointment Expert Window on page 51.

2. Enter the fields and options in the Appointment Expert window. For our example, we will enter the following:
   - Patient: Jane Doe
   - Provider: G150

3. Go to the Appt Info section.

4. From the Code drop-down field, select 1HR.

5. Go to the Date Range section and enter the following fields:
   - From: 01/11/2012
   - To: 30/11/2012
6. Go to the **Time Range** section and enter the following fields:

- **From:** 01:00 PM  
- **To:** 05:00 PM

7. Click **Search**.

axiUm begins the search process and displays any search results in the list view.

You have successfully used the Appointment Expert window to search for available appointment blocks.

2 Using Scheduler Display Features

This section covers the following topics:

- Using appointment window modes
- Using clinic time reasons
- Using non-clinic time reasons
- Using appointment indicators

2.1 Using Appointment Window Modes

This section covers the following topics:

- Using patient mode of appointment view
- Using family mode of appointment view
Using Patient Mode of Appointment View

Before you begin, make sure you have set up axiUm to display appointment views in patient mode. For instructions on displaying appointment views in patient mode, see Setting up Appointment View to Use Patient Mode on page 25.

For this example, we will open the Patient Appointments window for patient Jane Doe for entering a regular appointment.

▼ To open the Patient Appointments window:

1. Go to the Scheduler module.
2. Click (Rolodex).

axiUm displays the Rolodex (Select Patient) window. For information on the Rolodex (Select Patient) window, refer to the axiUm Reference Manual for Scheduler and see Rolodex (Select Patient) Window on page 121.

3. From the list box, select a patient. For our example, we will select Jane Doe.

axiUm displays the Patient Appointments window. For information on the Patient Appointments window, refer to the axiUm Reference Manual for Scheduler and see Patient Appointments Window on page 104.
4. Enter an appointment. For our example, we will select the **Make New** button to make a new appointment.

axiUm displays the New Appointment window. For information on the New Appointment window, refer to the axiUm Reference Manual for Scheduler and see *New Appointment Window* on page 91.

![New Appointment Window](image)

Use this window to enter an appointment. For instructions on entering new appointments, see *Entering New Appointments* on page 71.

You have successfully opened the Patient Appointments window for entering new appointments.

**Using Family Mode of Appointment View**

Before you begin, make sure you have set up axiUm to display appointment views in family mode. For instructions on displaying appointment views in family mode, see *Setting up Appointment View to Use Family Mode* on page 26.

For this example, we will open the Family Appointment window for patient Jane Doe and family members. Then we will select patient John Doe for entering a new appointment.

▼ **To open the Family Appointment window:**

1. Go to the **Scheduler** module.

2. Click ![Rolodex](image) (Rolodex).
Using Scheduler Display Features

axiUm displays the Rolodex (Select Patient) window. For information on the Rolodex (Select Patient) window, refer to the axiUm Reference Manual for Scheduler and see Rolodex (Select Patient) Window on page 121.

3. From the list box, select a patient. For our example, we will select Jane Doe.

axiUm displays the Family Appointments window. For information on the Family Appointments window, refer to the axiUm Reference Manual for Scheduler and see Family Appointments Window on page 80.

4. Enter an appointment. For our example, we will select the Make New button to make a new appointment.

axiUm displays the New Appointment window. For information on the New Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Appointment Window on page 91.
Use this window to enter an appointment. For instructions on entering new appointments, see *Entering New Appointments* on page 71.

You have successfully opened the Family Appointments window for entering new appointments.

2.2 Using Clinic Time Reasons

Before you begin, make sure you have set up clinic times reasons in axiUm. For instructions on setting up clinic time reasons in axiUm, see *Setting up Clinic Time Reasons* on page 21.

For this example, we will apply the clinic time Oral Surgery between 8:00am and 12:00pm to the chair occupied by provider Ken Klaahsen.

▼To apply clinic times to a book:

1. Go to the Scheduler module’s Active tab.
2. Right-click and drag an appointment block.
3. Release the mouse button.

axiUm displays a list of options.

4. Select the **Edit Clinic Time Description** option.

axiUm displays the Edit Clinic Time Description window. For information on the Edit Clinic Time Description window, refer to the axiUm Reference Manual for Scheduler and see *Edit Clinic Time Description Window* on page 67.
5. Go to the **Description** field and click (ellipsis).

axiUm displays the Clinic Time Reasons window. For information on the Clinic Time Reasons window, refer to the axiUm Reference Manual for Maintenance and see *Clinic Time Reasons Window* on page 720.

6. From the list view, highlight an item. For our example, we will select **Oral Surgery**.

7. Click (Close).

axiUm saves the selection, closes the Clinic Time Reasons window, and returns to the Edit Clinic Time Description window.

The selected clinic time name is displayed in the Description field.

8. Click **OK**.

axiUm saves the entry, closes the Edit Clinic Time Description window, and returns to the Scheduler window. The selected clinic time is displayed in the selected time block using the associated description name and color.
You have successfully displayed a clinic time. This indicates that this time is preferably used for booking appointments for a specific purpose. axiUm still allows you to book other appointments outside this preference.

### 2.3 Using Non-Clinic Time Reasons

Before you begin, make sure you have set up non-clinic time reasons in axiUm. For instructions on setting up non-clinic time reasons in axiUm, see *Setting up Non-Clinic Time Reasons* on page 23.

For this example, we will apply the non-clinic time Class between 1:00pm and 2:00pm to the chair occupied by provider Ken Klaahsen.

**To apply non-clinic times to a book:**

1. Go to the *Scheduler* module’s *Active* tab.
2. Right-click and drag an appointment block.
3. Release the mouse button.

axiUm displays a list of options.

4. Select the **Add Clinic Time Exception** option.

axiUm displays the **Add Provider Clinic Time Exceptions** window. For information on the Add Provider Clinic Time Exceptions window, refer to the axiUm Reference Manual for Scheduler and see *Add Provider Clinic Time Exceptions Window* on page 2.
5. Go to the **Description** field and click [ ] (ellipsis).

   axiUm displays the Clinic Time Exception Reasons window. For information on the Clinic Time Exception Reasons window, refer to the axiUm Reference Manual for Maintenance and see *Clinic Time Exception Reasons Window* on page 719.

6. From the list view, highlight a record. For our example, we will select **Class**.

7. Click [ ] (Close).

   axiUm saves the selection, closes the Clinic Time Exception Reasons window, and returns to the Add Provider Clinic Time Exceptions window.

   The selected non-clinic time name is displayed in the Description field.

8. Click **OK**.
axiUm saves the selection, closes the Add Provider Clinic Time Exceptions window, and returns to the Scheduler window. The selected non-clinic time is displayed in the selected time block using the associated description name and color.

You have successfully displayed a clinic time. This indicates that this provider time or chair time is unavailable for booking appointments. You cannot book anything in a non-clinic time block.

### 2.4 Using Appointment Indicators

Before you begin, make sure you have set up appointment indicators in axiUm. For instructions on setting up appointment indicators in axiUm, see *Setting up Appointment Indicators* on page 27.

For this example, we will enter multiple appointments so that axiUm displays the indicator Has Additional Appointments to notify that the patient has additional appointments booked in axiUm, for the same day.

▼To display appointment indicators in the book:

1. Go to the Scheduler module’s Active tab.
2. For our example, we will create two regular appointments for the same provider.

For instructions on creating appointments, see *Entering New Regular Appointments* on page 72.
axiUm displays the indicator on the appointments to signify that this patient has other booked appointments. Hovering the mouse over the indicator displays a tooltip.

You have successfully used appointment indicators in the Scheduler window.

3 Managing Appointment Activities

This section covers the following topics:

- Entering new appointments
- Entering planned appointments
- Placing appointments on wait list
- Entering appointments using shared chairs
- Rescheduling appointments
- Deleting appointments
- Failing appointments
- Cancelling appointments
- Checking patients in and out
- Reassigning appointments

3.1 Entering New Appointments

This section covers the following topics:

- Entering new regular appointments
- Entering new recall (hygiene) appointments
Entering New Regular Appointments

For this example, we will enter a new regular appointment (i.e., not a recall appointment) for patient Jane Doe.

▼ To enter a new appointment:

1. Open an appointment window. For our example, we will open the Patient Appointments window.

   For instructions on opening the Patient Appointments window, see Using Patient Mode of Appointment View on page 61.

2. Click Make New.

   axiUm displays the New Appointment window. For information on the New Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Appointment Window on page 91.

3. Enter the fields and options. For our example, we will enter the following:

   • Provider: G150
   • Appt. Code: 1.5HR, 1 1/2 Hour Appointment
4. Click Accept.

axiUm saves the entries, closes the New Appointment window, and returns to the Scheduler window. axiUm hovers the appointment block for you to book.

You have successfully entered a regular appointment.

**Entering New Recall (Hygiene) Appointments**

For this example, we will enter a new recall appointment (i.e., hygiene appointment) for patient Jane Doe to see hygienist Alan Davis.

▼To enter a new recall appointment:

1. Open an appointment window. For our example, we will open the Patient Appointments window.

   For instructions on opening the Patient Appointments window, see Using Patient Mode of Appointment View on page 61.

2. Click Make New.

   axiUm displays the New Appointment window. For information on the New Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Appointment Window on page 91.
3. Enter the fields and options. For our example, we will enter the following:

- **Provider**: Y601
- **Appt. Code**: RECALL, Recall Appointment
- **Recall**: selected

4. Click **Accept**.

axiUm saves the entries, closes the New Appointment window, and returns to the Scheduler window. axiUm hovers the appointment block for you to book.
3.2 Entering Planned Appointments

This section covers the following topics:

- Entering planned regular appointments
- Entering planned recall (hygiene) appointments

Entering Planned Regular Appointments

For this example, we will plan a regular appointment (i.e., not a planned recall appointment) for patient Jane Doe.

▼To enter a planned appointment:

1. Open an appointment window. For our example, we will open the Patient Appointments window.

   For instructions on opening the Patient Appointments window, see Using Patient Mode of Appointment View on page 61.

2. Click New Planned.
axiUm displays the New Planned Appointment window. For information on the New Planned Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Planned Appointment Window on page 99.

3. Enter the fields and options. For our example, we will enter the following:

- **Provider**: G150
- **Appt. Code**: 1.5HR, 1 1/2 Hour Appointment

4. Click Accept.

axiUm saves the entries, closes the New Planned Appointment window, and displays the Patient Appointments window. The planned recall appointment is displayed in the list view.
You have successfully entered a planned appointment.

**Entering Planned Recall (Hygiene) Appointments**

For this example, we will plan a recall appointment (i.e., hygiene appointment) for patient Jane Doe to see hygienist Alan Davis.

▼ **To enter a planned recall appointment:**

1. Open an appointment window. For our example, we will open the **Patient Appointments** window.

   For instructions on opening the Patient Appointments window, see *Using Patient Mode of Appointment View* on page 61.

2. Click **New Planned**.

   axiUm displays the New Planned Appointment window. For information on the New Planned Appointment window, refer to the axiUm Reference Manual for Scheduler and see *New Planned Appointment Window* on page 99.

3. Enter the fields and options. For our example, we will enter the following:

   - **Provider:** Y601
   - **Appt. Code:** RECALL, Recall Appointments
   - **Recall:** selected
4. **Click Accept.**

axiUm saves the entries, closes the New Planned Appointment window, and displays the Patient Appointments window. The planned recall appointment is displayed in the list view.

![New planned recall appointment](image)

You have successfully entered a planned recall appointment.

### 3.3 Placing Patient Appointments on Wait List

This section covers the following topics:

- Moving booked appointments to wait list
- Moving planned appointments to wait list
- Entering new appointments in wait list
- Moving pending appointments to wait list

Patients who cannot get an earlier appointment can be placed on a wait list to be contacted if an earlier appointment becomes available.

When you check in a patient for their appointment, axiUm automatically removes them from the wait list.

**Moving Booked Appointments to Wait List**

If a patient has a booked (i.e., active) appointment and wants to be placed on a wait list for an earlier appointment, you can edit the booked appointment by placing it on a wait list.
Before you begin, make sure you have set up wait lists in axiUm. For instructions on setting up wait lists in axiUm, see Setting up Wait Lists on page 46.

To move a booked appointment to the wait list:

1. Go to Scheduler module’s Active tab.

2. Select an appointment by right-clicking it.

axiUm displays a list of options.
3. Select the **Add to Wait List** option.

axiUm displays the Add to Wait List window. For information on the Add to Wait List window, refer to the axiUm Reference Manual for Scheduler and see *Add to Wait List Window* on page 6.

![Add to Wait List window](image)

Note that the Reason drop-down field defaults to the wait list reason defined in the setup.

4. Click **OK**.

axiUm saves the entries, closes the Add to Wait List window, and returns to the Scheduler window.

![Scheduler window](image)

When you open this appointment (i.e., Edit Appointment window), axiUm displays the wait list indicator to signify that this appointment is already on the wait list.
Managing Appointment Activities

axiUm displays the appointment in the Appointment Lists window’s Wait List tab. For information on the Appointment Lists window’s Wait List tab, refer to the axiUm Reference Manual for Scheduler and see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

You have successfully moved a booked (i.e., active) appointment to the wait list.

Moving Planned Appointments to Wait List

Only planned appointments can be moved to the wait list, other appointment types cannot.

Before you begin, make sure you have set up wait lists in axiUm. For instructions on setting up wait lists in axiUm, see Setting up Wait Lists on page 46.

For this example, we will select an existing planned appointment (i.e., not a recall appointment) for patient Jane Doe and place this patient’s appointment on the wait list for an earlier appointment.
To move a planned appointment to the wait list:

1. Open an appointment window. For our example, we will open the **Patient Appointments** window.

   For instructions on opening the Patient Appointments window, see *Using Patient Mode of Appointment View* on page 61.

2. From the list view, highlight a record of type Planned. For our example, we will select the 90-minute appointment.

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

4. Select the **Add to Wait List** option.

   axiUm displays the Add to Wait List window. For information on the Add to Wait List window, refer to the axiUm Reference Manual for Scheduler and see *Add to Wait List Window* on page 6.

5. Click **OK**.

   axiUm saves the entries, closes the Add to Wait List window, and returns to the Patient Appointments window. axiUm indicates that the planned appointment is now on the wait list.
Managing Appointment Activities

axiUm displays the appointment in the Appointment Lists window’s Wait List tab. For information on the Appointment Lists window’s Wait List tab, refer to the axiUm Reference Manual for Scheduler and see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.

You have successfully moved a planned appointment to the wait list.

Entering New Appointments in Wait List

For this example, we will select an existing planned appointment (i.e., not a recall appointment) for patient Jane Doe and place this patient’s appointment on the wait list for an earlier appointment.

For this example, we will enter a new regular appointment.

▼ To enter a new appointment directly in the wait list:

1. Enter a new regular appointment.

   For instructions on entering a new regular appointment, see Entering New Regular Appointments on page 72.

2. In the New Appointment window’s Appt Details section, select the Sooner if possible checkbox.

   Note that in the setup, we indicated that selecting this checkbox will automatically place the appointment on the wait list (see Setting up Wait List Behavior on page 48).
3. Click **Accept**.

axiUm displays the Add to Wait List Question window.

4. Click **Yes**.

axiUm displays the Add to Wait List window. For information on the Add to Wait List window, refer to the axiUm Reference Manual for Scheduler and see *Add to Wait List Window* on page 6.

Note that the Reason drop-down field defaults to the wait list reason defined in the setup (see *Setting up Wait List Behavior* on page 48).

5. Click **OK**.
axiUm saves the entries, closes the Add to Wait List window, closes the New Appointment window, and returns to the Scheduler window. axiUm hovers the appointment block for you to book.

When you open this appointment (i.e., Edit Appointment window), axiUm displays the wait list indicator to signify that this appointment is already on the wait list.

axiUm displays the appointment in the Appointment Lists window’s Wait List tab. For information on the Appointment Lists window’s Wait List tab, refer to the axiUm Reference Manual for Scheduler and see Appointment Lists Window - Wait List Tab (Regular Mode) on page 37.
You have successfully entered a new appointment in the wait list.

Moving Pending Appointments to Wait List

Before you begin, make sure you have set up wait lists in axiUm. For instructions on setting up wait lists in axiUm, see Setting up Wait Lists on page 46.

▼To move a pending appointment to wait list:

1. Go to Scheduler module’s Active tab.

2. Select a rescheduled appointment by selecting a hovering appointment block. For instructions on rescheduling an appointment, see Rescheduling Appointments on page 89.
3. Select the **Move to Pending** page option.

axiUm removes the hovering appointment block from the Scheduler window.

Note that in the setup, we indicated that moving an appointment to pending status will move it to the wait list (see **Setting up Wait List Behavior** on page 48).

axiUm displays the appointment in the Appointment Lists window’s Wait List tab. For information on the Appointment Lists window’s Wait List tab, refer to the axiUm Reference Manual for Scheduler and see **Appointment Lists Window - Wait List Tab (Regular Mode)** on page 37.
You have successfully moved a pending appointment to the wait list.

### 3.4 Entering Appointments Using Shared Chairs

Before you begin, make sure you have the following:

- An appointment code that requires multiple providers. For instructions on setting up appointment codes for multiple providers, see *Defining Appointment Codes for Multiple Providers* on page 32.
- You are set up to use the advanced mode of appointment entry. For instructions on setting up advanced mode of appointment entry, see *Setting up Advanced Appointment Entry Mode* on page 44.

For this example, we will enter a new regular appointment using an appointment code that requires a second provider.

**To enter an appointment using shared chairs:**

1. Enter a new appointment.
   
   For instructions on entering new appointments, see *Entering New Regular Appointments* on page 72.

2. Make sure that the appointment code you select requires multiple providers.

3. Make sure that the second provider does not have:
   
   - Chairs reserved
   - Assigned reservations

   In the Scheduler window’s Active tab, axiUm displays multiple columns showing the additional provider required for the selected appointment code.
3.5 Rescheduling Appointments

For this example, we will reschedule an existing appointment for patient Jane Doe.

To reschedule an appointment:

1. Go to the Scheduler module’s Active tab.
2. From the book, select an existing appointment by right-clicking it.

axiUm displays a list of options.

3. Select the Reschedule option.

axiUm changes the booking appointment block to a hovering appointment block.
4. Move the hovering appointment block to a different available time.

5. Double-click to book it.
You have successfully rescheduled an appointment.

3.6 Deleting Appointments

If an appointment was entered in error, you can delete it.

For this example, we will delete an appointment that was made in error for patient Jane Doe.

▼To delete an appointment:

1. Go to the Scheduler module’s Active tab.
2. From the book, select an existing appointment by right-clicking it.

axiUm displays a list of options.
3. Select the **Delete** option.

axiUm displays the Delete Appointment Warning window.

4. Click **Yes**.

axiUm deletes the appointment block.
You have successfully deleted an appointment.

### 3.7 Failing Appointments

Before you begin, make sure you have defined failed appointments in axiUm. For instructions on defining failed appointments in axiUm, see *Defining Failed Appointments* on page 39.

For this example, we will indicate that the patient Jane Doe failed to show up for the booked appointment.

**To fail an appointment:**

1. Go to the **Scheduler** module’s **Active** tab.
2. From the book, select an existing appointment by right-clicking it.

   axiUm displays a list of options.
3. Select the **Failed** option.

axiUm displays the Failed Appointment window. For information on the Failed Appointment window, refer to the axiUm Reference Manual for Scheduler and see *Failed Appointment Window* on page 79.

4. From the **Reason** drop-down field, select a fail reason. For our example, we will select **NOSHOW**, Did Not Show Up.

5. Click **OK**.

axiUm displays the Missed Appointment Charge window. For information on the Missed Appointment Charge window, refer to the axiUm Reference Manual for Scheduler and see *Missed Appointment Charge Window* on page 90.
6. In the **Practice** drop-down field, select a practice to apply the charges. For our example, we will select **School of Dentistry**.

7. Click **OK**.

axiUm displays the Reschedule Now Question window.

8. Click **No**.

axiUm saves the entries, closes the Missed Appointment charge window and the Failed Appointment window, and returns to the Scheduler window.

axiUm deletes the appointment block.

![Scheduler - Grad Clinic Book](image)

You have successfully indicated a failed appointment.

### 3.8 Cancelling Appointments

Before you begin, make sure you have defined cancellation appointments in axiUm. For instructions on defining cancellation appointments in axiUm, see Defining Cancelled Appointments on page 41.
For this example, we will cancel a booked appointment for the patient Jane Doe, and indicate that this patient cancelled with less than 24 hour notice.

▼To cancel an appointment:

1. Go to the Scheduler module’s Active tab.
2. From the book, select an existing appointment by right-clicking it.

axiUm displays a list of options.

3. Select the Cancel option.

axiUm displays the Cancellation window. For information on the Cancellation window, refer to the axiUm Reference Manual for Scheduler and see Cancellation Window on page 55.
4. From the **Reason** drop-down field, select a cancellation reason. For our example, we will select **U24HR, Cancelled Under 24 Hour Notice**.

5. Click **OK**.

   axiUm displays the Missed Appointment Charge window. For information on the Missed Appointment Charge window, refer to the axiUm Reference Manual for Scheduler and see **Missed Appointment Charge Window** on page 90.

6. In the **Practice** drop-down field, select a practice to apply the charges. For our example, we will select **School of Dentistry**.

7. Click **OK**.

   axiUm displays the Reschedule Now Question window.

8. Click **No**.

   axiUm saves the entries, closes the Missed Appointment charge window and the Failed Appointment window, and returns to the Scheduler window.

   axiUm deletes the appointment block.
You have successfully cancelled an appointment.

3.9 Checking Patients In & Out

For instructions on checking patients in and out, refer to the axiUm User Guide for Rolodex & Patient Card and see Checking Patients In & Out on page 88.

3.10 Reassigning Appointments

You can reassign all appointments under a single provider to a different provider. This is useful if the provider called in sick and you want to transfer their appointments to another available provider.

For this example, we will reassign all appointments booked for Ken Klaahsen today to Lisa Jaaks.

▼To reassign all existing appointment under a provider for a selected day:

1. Go to the Scheduler module’s Active tab.
2. Do one of the following:
   - Go anywhere in a column and select the Reassign Appointments right-click option.
   - Go to a column heading and select the Reassign Appointments right-click option.

axiUm displays the Reassign Appointments window. For information on the Reassign Appointments window, refer to the axiUm Reference Manual for Scheduler and see Reassign Appointments Window on page 117.
3. Go to the **To** section.
4. Enter the fields and options. For our example, we will enter the following:
   - **Provider**: G151, Lisa Jaaks
   - **Clinic**: Grad Clinic
   - **Chair**: DC02

5. Click **OK**.

   axiUm saves the changes, closes the Reassign Appointments window, and returns to the Scheduler window.

   axiUm transfers the appointments from one provider to another.
You have successfully reassigned all appointments from one provider to another.

4 Appointment Printouts

This section covers the following topics:

- Setting up appointment form defaults
- Printing appointment forms

4.1 Setting up Appointment Form Defaults

For this example, we will set up axiUm to default to printing the appointment card for the patient to take home.

▼To set up your default printer for printing appointment forms:

1. Go to the Scheduler module.

2. Click (Options/Settings).

axiUm displays the Scheduler Options window. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 828.
3. Go to the **Printing** section.

4. Enter the fields and options. For our example, we will enter the following:

   - Default Appt Form: Appointment Card
   - Default Reminder Description: Please remember to bring your ID.
   - Calculate Patient’s balance for Appointment form?: selected

5. Click **Accept**.

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

You have successfully set up printout defaults for appointment forms. You can now print appointment forms. For instructions on printing appointment forms, see next section, *Printing Appointment Forms* on page 102.
4.2 Printing Appointment Forms

Before you begin, make sure you set up the default options for printing appointment forms. For instructions on setting up default options for printing appointment forms, see Setting up Appointment Form Defaults on page 100.

▼To print appointment forms:

1. Go to the Scheduler module.
2. Go to a booked appointment.
3. Select an appointment by right-clicking it.

axiUm displays a list of options.

4. Select the Print Appt Form option.

axiUm displays the Print Appointment Options window. For information on the Print Appointment Options window, refer to the axiUm Reference Manual for Scheduler and see Print Appointment Options Window on page 113.
The default option set up is already selected. For our example, we will keep the default and change nothing.

5. Click OK.

axiUm displays the 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 appointment form to the default printer.

You have successfully printed an appointment form for a patient.